

Bracknell Forest Council: Business Survey 2022-23

Report: January 2023



Research
Evaluation
Community Engagement
Strategy Development

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Executive Summary

Introduction and background

1. Bracknell Forest Council commissions annually a survey of businesses to gain an understanding of the impacts of changing economic conditions on businesses in Bracknell Forest, as well as capture the views of local businesses about skills, infrastructure and the green agenda amongst other topical issues. The research is used to inform economic strategies and initiatives 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).
3. Specific issues covered by the survey are:
 - Current economic conditions, including post-pandemic recovery, energy prices and cost of living challenges
 - Brexit
 - Skills including vacancies, hard-to-fill vacancies, skills gaps, retention and training
 - Infrastructure including physical infrastructure, broadband and business support provision
 - Employee wellbeing
 - The green agenda and commitment to net-zero

Approach to the research

4. A total of 517 interviews were carried out via CATI (computer assisted telephone interviewing) between the start of November and the end of November 2022.
5. A bespoke, local questionnaire was developed and tested with local businesses. Some of the questions repeated those asked in previous business surveys conducted in 2021, 2020 and 2014/15 to allow for comparability, although several of the questions are new or adapted to reflect current circumstances and areas of interest.
6. 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

Economic conditions

7. Just under a quarter of businesses (23%) said their turnover was at least slightly higher than compared to pre-Covid levels, 33% said there has been no change and two-fifths (39%) said it is at least slightly lower. Consequently, there are some signs of business recovery post-Covid, with in 2021 57% of businesses stating that turnover was at least slightly lower (including 35% stating it was substantially lower). 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.
8. Bracknell Forest businesses were more likely to expect performance over the next 12 months to improve (37%) rather than deteriorate (20%), while two-fifths (43%) expected performance to remain stable. This said, optimism is less than in 2021, although this may reflect that in 2021 the base was lower given the pandemic and the only way was up. At the same time, the current lower level of optimism may also reflect the challenging current trading conditions.
9. A fifth of businesses (21%) said they are not affected by current economic conditions or issues. Over half (54%) said they are negatively affected by the cost of living crisis and 38% said the energy prices. 20% mentioned Brexit and 16% said the post-pandemic recovery. Approximately, 2-3% mentioned each of the following: 'general economic conditions', 'uncertainty with the Government' and 'the war in Ukraine' as negative impacts on their business.
10. To mitigate economic impacts, 28% of businesses said they wanted access to finance to help manage the current economic challenges, 22% said they wanted support to reduce costs and 14% mentioned access to Government support. 11% mentioned access to employment and skills support, 6% business information, support or advice, 5% mentioned developing local supply chains and encouraging residents to shop local (mentioned spontaneously in the 'other' comments) and 3% mentioned investment to improve local infrastructure. 29% said they did not need any help or support, which was more likely to be mentioned by businesses that do not consider there to be any notable challenges for their business currently.
11. **These results indicate that businesses have recovered to an extent from the pandemic, which is now over-shadowed by other economic challenges such as the energy price rise and cost of living crisis. Whilst there is a degree of resilience amongst businesses and a sense that they are not sure in which direction the economic wind will blow, there are undoubtedly concerns for the forthcoming year. Consequently, there is demand for business support, partly financial and partly around help to reduce costs, other business support information and advice, and work to develop a robust local economy, potentially targeted at key sectors and businesses.**

Brexit

12. The results almost mirror those from 2021 highlighting sustained impact, with 42% of businesses stating that leaving the EU has had a longer term negative impact, half no notable impact and only 3% said it has had a positive impact. The direction of the impact was more skewed towards negative than had been anticipated by businesses beforehand.

In the 2020 Business Infrastructure Survey (prior to the end of the Brexit transition period), 23% had anticipated a negative impact.

13. Similar with 2021, problems importing from the EU was the most common negative impact for businesses, with 24% saying this is a key issue for them. Supply chain problems are an issue for 22%, 16% said labour availability is an issue and 10% stated the increased cost of business. Problems importing from the EU, supply chain issues and labour availability are particular issues for larger businesses.
14. **The proportion that said Brexit has had an impact on their business is higher in 2022 and 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 has perhaps been overshadowed by the pandemic. This highlights the continued need to support businesses to adapt to the post-EU reality, although it is potentially now part of the wider economic challenges facing businesses locally and nationally.**

Recruitment, skills and retention

15. Businesses reported a higher number of vacancies in 2022 (49%) than 2021 (37%), perhaps reflecting post-pandemic business growth as well as fluidity in the labour market. This compares to 31% of businesses who reported having had at least one vacancy in the 2020 Business Skills Survey.
16. 61% of businesses that had vacancies reported that they had found at least one of these vacancies hard to fill, equating to 30% of all businesses. This compares to 59% of hard-to-fill vacancies in 2021 (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 they had found at least one of these vacancies hard-to-fill, equating to 15% of all businesses.
17. 15% of businesses with staff have skills gaps and 79% do not. This is a slightly more positive picture than in 2021 where 22% of businesses said they had skills gaps and similar to results in 2020 (85% did not have skills gaps).
18. 43% of businesses mentioned that they found it easy to retain staff in Bracknell Forest. A third of businesses mentioned they do not have any staff to retain. Just 6% said it is difficult to retain staff. This is similar to the figures seen in the 2021 survey (when 46% of businesses mentioned that they found it easy to retain staff in Bracknell Forest and 35% of businesses mentioned they do not have any staff to retain).
19. 28% of businesses said their workforce would benefit from training to improve their skills and 32% said they would not (with 34% not having any employees). Businesses with skills gaps in their existing workforce were more likely to state their staff would benefit from training – cited by 86% of these businesses.
20. 31% of businesses said they would be interested in a Bracknell-based training and development service.
21. **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, Brexit and current economic conditions. Recruitment and skills issues tend to be major constraints on growth and are likely to represent key areas to support local businesses.**

Infrastructure

22. As in 2021, 35% of businesses said they expect their operations in Bracknell Forest to increase. 48% said stay the same and 8% decrease.
23. The most common aspect of infrastructure to improve, mentioned by around a quarter, remains the local road network, access to motorways, and traffic alleviation (24% in both 2022 and 2021). The second most cited improvement is reduced business rates and general pro-business measures, cited by 12% of respondents (9% in 2021). Approximately 5% mentioned more electric car charging points spontaneously in the 'other' comments.
24. Reducing business rates continues to be one of the most cited actions to support growth, mentioned by 20% of businesses (12% in 2021 and 20% in 2020). General pro-business measures and support for small businesses was cited by 15% of businesses (8% in 2021 and 9% in 2020). 11% of businesses mentioned improving the local road network and traffic alleviation (16% in 2021 and 19% in 2020). Approximately 5% mentioned inward investment marketing and promotion spontaneously in the 'other' comments.
25. In 2021, 4% mentioned support to help recover from the pandemic, which was not cited in 2022 and neither was support to manage the impact of Brexit.
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. There is also emerging demand to invest in electric charging points and sustainable travel, as well as invest in inward marketing activities.**

Broadband

27. Whilst the majority of businesses remain unaware of Superfast Berkshire, there has been a slight increase with 26% of businesses aware compared to 19% in 2021 (and 21% in 2020).
28. 51% of businesses now have access to superfast/full-fibre broadband, which is an improvement on the 2021 figure (43%) and 2020 (40%).
29. 30% rate their internet connection as excellent, similar to previous survey results (26% in 2021 and 30% in 2020). 49% rate it as adequate (58% in 2021 and 59% in 2020), and 16% rate it as poor (13% in 2021). Businesses without superfast broadband are more likely than others to rate their internet connection as poor – 33% rate it as poor compared with 5% of businesses that have superfast broadband.
30. The majority of businesses (89%) remain unaware of the grants to install superfast/full-fibre broadband (87% in 2021). 5% are aware of them in their area and 2% are aware of them in general, but not that they may be available in their area, with overall 7% stating that they are aware of the grants.
31. Similar to 2021, the majority of businesses (81%) are not aware of the Building Digital UK Gigabit project (77% in 2021). 15% are aware of it (19% in 2021). 53% of businesses said having Gigabit capable broadband is at least quite important to their business, which is a decrease compared with 67% in 2021. 26% said it is not important (compared to 16% in 2021). Businesses that are aware of the Building Digital UK Gigabit project are more likely to consider having Gigabit capable broadband as important – 69% think it is important compared with 52% of businesses that are not aware.
32. **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

- 33. 14% of businesses are aware of the LEP (16% in 2021 and 25% in 2020), whereas 86% are not aware (82% in 2021 and 72% in 2020).
- 34. Similar to 2021, 20% of businesses are aware of the Thames Valley Berkshire Growth Hub (22% in 2021 and 14% in 2020). Businesses that are aware of the LEP are more likely to be aware of the Growth Hub – 62% that are aware of the LEP are also aware of the Growth Hub compared with 13% of businesses that are not aware of the LEP.
- 35. 16% of businesses are aware of the Bracknell Business Improvement District (11% in 2021). Businesses within the general BID area are more likely to be aware – 22% are aware compared with 7% of other businesses.
- 36. **There remains scope to increase awareness of the LEP, Growth Hub and BID to help maximise the benefit of these services to local businesses, and support business growth, especially during the challenging economic climate ahead.**

Wellbeing

- 37. As in 2021, flexible working is the most cited scheme offered to employees (26% in 2022 and 33% in 2021). 15% cited healthcare schemes and 13% access to mental health support and 11% well-being schemes. 10% cited home-working, which has changed from 17% in 2021 and 33% in 2020 (which is likely due to inflated levels in those years as a result of lockdowns and the pandemic). Similarly, flexible working has decreased from 52% in 2020 and 33% in 2021 to 26% in 2022, likely due to changes in working practices during the height of the pandemic.
- 38. 49% of businesses said they measure or monitor staff wellbeing levels, similar to 2021.
- 39. 58% said that Covid-19 has not impacted on their staff or is not applicable (likely because they do not have staff). This is similar to 2021 (56%). 20% said the pandemic decreased mental health and wellbeing (13% in 2021) and 13% mentioned increased stress levels (23% in 2021).
- 40. 22% of businesses said they provide information to their staff on free wellbeing services available in Bracknell Forest. 36% of businesses that said they do not provide such information to their staff, are interested in finding out more, especially larger businesses.
- 41. **Whilst the immediate impact of the pandemic on businesses and their staff has perhaps subsided, it has left a legacy of increased flexible and home-working and both a greater need for, and provision of, workplace wellbeing schemes. This is a positive, although there remains scope to support businesses further to enhance wellbeing provision to their staff.**

Green agenda

- 42. 52% of businesses said that climate change and sustainability issues are at least quite important for their business.
- 43. Similar with 2021, 4% of businesses are committed to becoming net-zero by 2030 (5% in 2021) and a further 5% have targets but not a deadline (7% in 2021). 41% of businesses said becoming net-zero is not something they are committed to or given much thought (40% in 2021).

44. Businesses who had actively committed to net-zero were asked what actions they were taking to achieve this. Businesses are taking a variety of actions, most notably reviewing energy efficiency of buildings (28%), sourcing sustainable materials (23%), changing company cars to electric (21%), encouraging sustainable forms of transport (20%) and relatedly installing electric vehicle charging points (15%). 16% are measuring their carbon footprint.
45. The most commonly cited barrier businesses gave to reducing the carbon footprint of their business was the lack of grants (15%), followed by not thinking the agenda is important (13%), availability of low-carbon alternatives (13%), lack of electric vehicle charging points (10%), being unable to change existing processes (9%), lack of capital/finance (8%) and lack of knowledge (8%). 18% said they 'don't know', perhaps reflecting a lack of engagement with, and knowledge of, the subject matter. 14% said that their business does not face barriers.
46. In response to the above barriers, businesses said the help they require to reduce their carbon footprint includes: information and advice, as well as hands-on support, to help design and implement changes; grants to facilitate changes and remove financial barriers; incentives to make changes, such as tax breaks or other financial or commercial advantages; improved infrastructure, especially electric vehicle charging points and improved public transport and cycling routes; and increased opportunities to recycle, becoming more digital and reducing paper-use.
47. In addition, about 20% of respondents said they do not need help because it is not a priority for them, especially in the current economic conditions. Similarly, about 10% of respondents said they do not need help because they are already doing as much as they can (or already have external help or internal expertise). About a third of respondents did not provide an answer to this question, perhaps indicating a lack of engagement or interest in the subject matter and that they do not know what support or help they require.
48. **Arguably, the sentiment amongst consumers for sustainability is only matched by about half of businesses locally. This suggests there is notable scope to increase awareness amongst businesses of their role to promote the green agenda and its benefits for businesses and the local economy, and support them to develop more sustainable business practices.**

The importance of segmenting and targeting

49. The survey results highlight consistent differences based on size of business, amongst other variables. For example, larger businesses are more likely to be resilient to the current economic conditions despite perhaps being more affected by them (based on their responses to this survey). They are also more likely to experience issues around recruitment and skills. They tend to have greater business support demands, although they have better access to infrastructure and broadband and are more aware and engaged with business support organisations and initiatives. They are also more likely to have wellbeing schemes and embrace the green agenda than smaller businesses. **This demonstrates the importance of segmenting businesses and developing appropriate strategies and support packages based on those segments.**

Main Report

Section 1: Introduction

Introduction, background and aims of the research

- 1.1. Bracknell Forest Council commissions annually a survey of businesses to gain an understanding of the impacts of changing economic conditions on businesses in Bracknell Forest, as well as capture the views of local businesses about skills, infrastructure and the green agenda amongst other topical issues. The research is used to inform economic strategies and initiatives 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:
 - Current economic conditions, including post-pandemic recovery, energy prices and cost of living challenges
 - Brexit
 - Skills including vacancies, hard-to-fill vacancies, skills gaps, retention and training
 - 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 517 interviews were carried out via CATI (computer assisted telephone interviewing) between the start of November and the end of November 2022.
- 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 2021, 2020 and 2014/15 to allow for comparability, although several of the questions are new or adapted to reflect current circumstances and areas of interest.
- 1.8. Quota sampling was used to ensure a representative split of the approximate 4,750 businesses operating 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 Statistics¹. 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 previous surveys, as well as by other variables such as business size.
- 1.10. With 517 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 current and previous surveys where applicable (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.

¹ Inter-departmental Business Register (IDBR) 2021. 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: Economic conditions

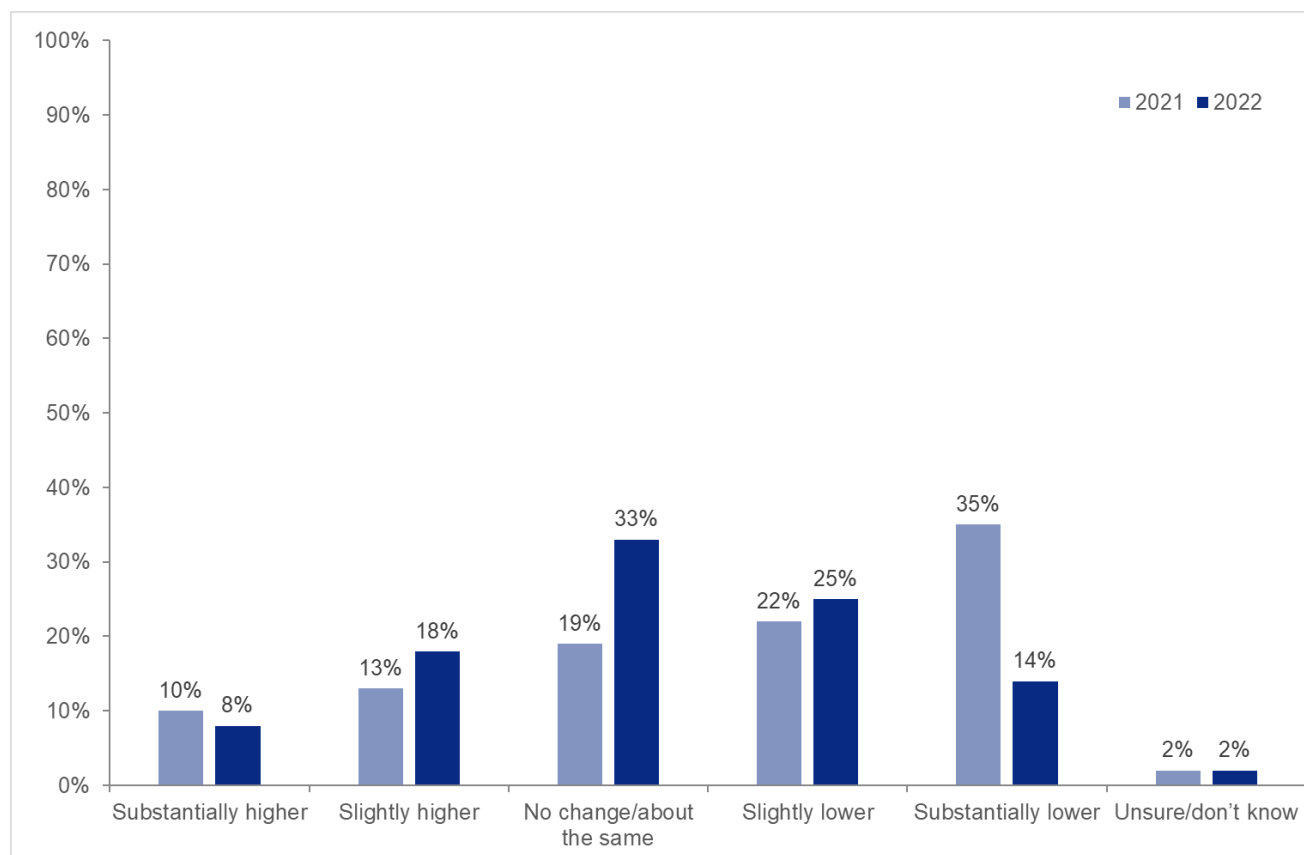
Introduction

2.1. This section presents findings about businesses' perceptions and experiences of the current economic conditions, including post-pandemic recovery, energy prices and cost of living challenges.

Business turnover

- 2.2. Just under a quarter of businesses (23%) said their turnover was at least slightly higher than compared to pre-Covid levels, 33% said there has been no change and two-fifths (39%) said it is at least slightly lower.
- 2.3. There are some signs of business recovery post-Covid, with in 2021 57% of businesses stating that turnover was at least slightly lower (including 35% stating it was substantially lower). 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. Smaller businesses are more likely to state that their turnover remains at least slightly lower – 43% of businesses with 0 to 4 employees said this, compared with 30% with 5 to 19 employees and 16% with 20+ employees.

Figure 2.1: Business turnover compared to pre-Covid levels



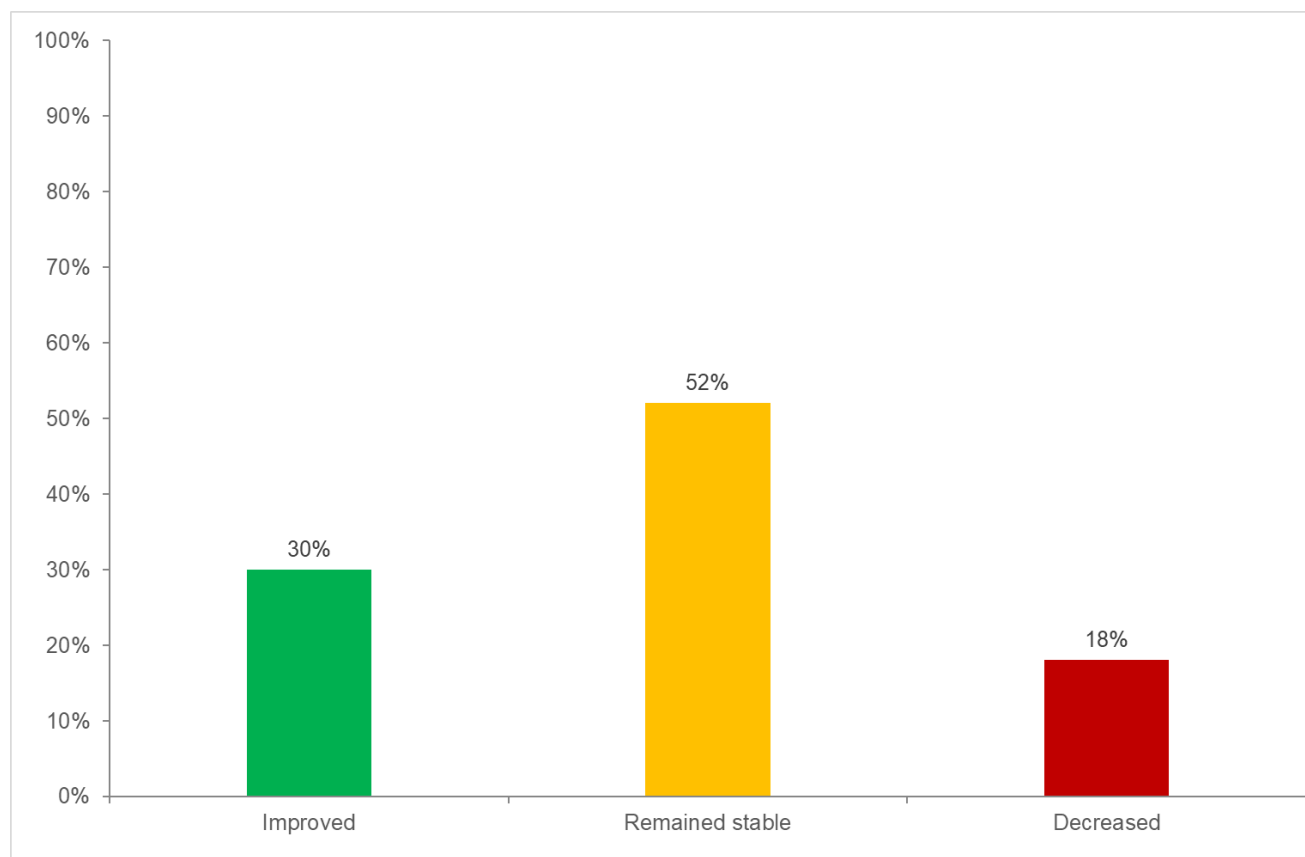
Number of respondents: 516.

Question asked: Compared to pre-Covid-19 pandemic levels, would you say that your businesses' turnover is higher, lower or about the same?

Business performance in past 12 months

- 2.5. 30% of businesses said business performance improved over the past 12 months, 52% said it remained stable and 18% said it decreased.
- 2.6. Smaller businesses are less positive than larger ones. For example, 29% of businesses with 0 to 4 employees said business performance improved (20% decreased), compared with 31% of businesses with 5 to 19 employees (12% decreased) and 51% with 20+ employees (6% decreased).

Figure 2.2: Business performance over past 12 months



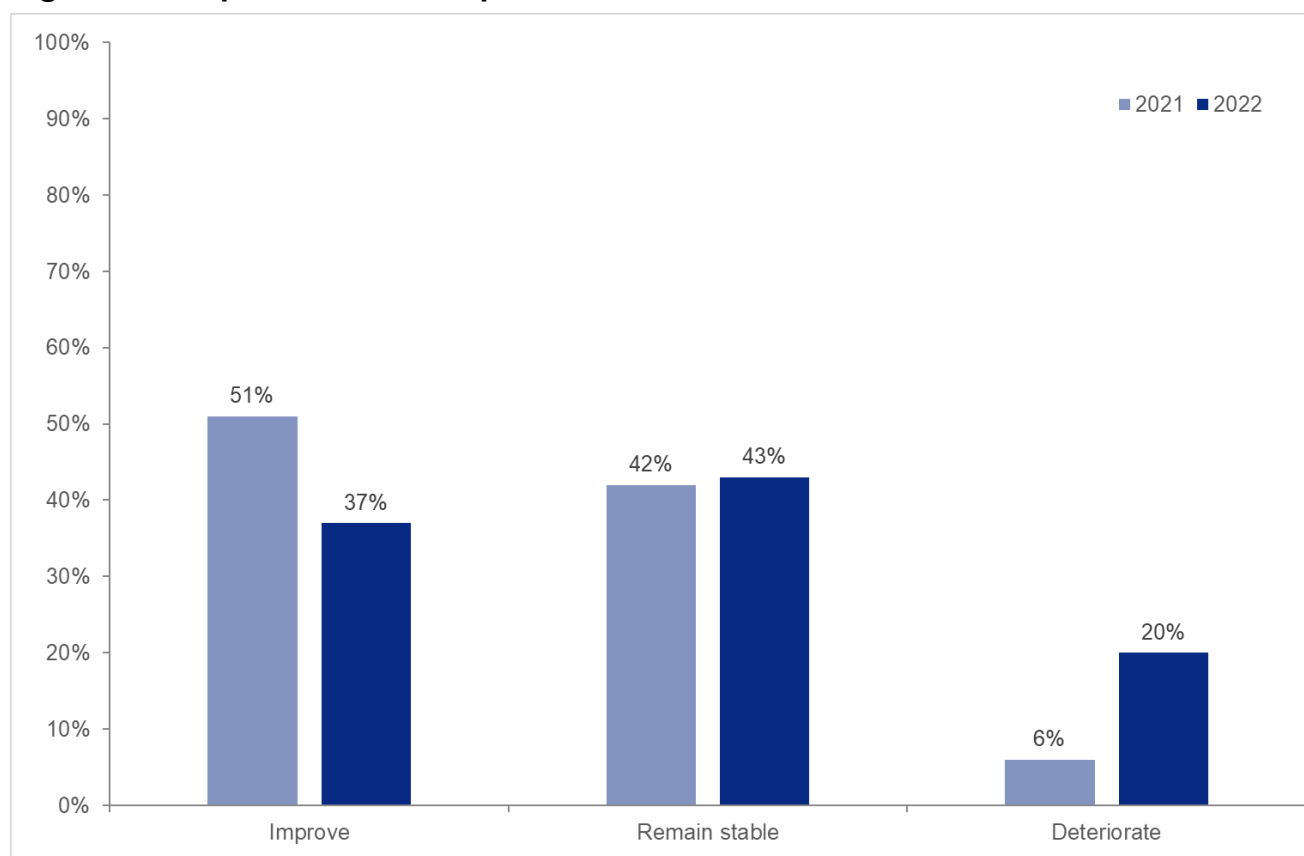
Number of respondents: 513.

Question asked: Over the past 12 months, has your business performance improved, remained stable or decreased?

Business performance in next 12 months

- 2.7. Bracknell Forest businesses were more likely to expect performance over the next 12 months to improve (37%) rather than deteriorate (20%), while two-fifths (43%) expected performance to remain stable.
- 2.8. This said, optimism is less than in 2021, although this may reflect that in 2021 the base was lower given the pandemic and the only way was up. At the same time, the current lower level of optimism may also reflect the challenging current trading conditions.
- 2.9. Larger businesses are more likely to expect performance over the next 12 months to improve (54% of businesses with 20 or more staff said it would improve, compared with 36% of other businesses).

Figure 2.3: Expected business performance over next 12 months



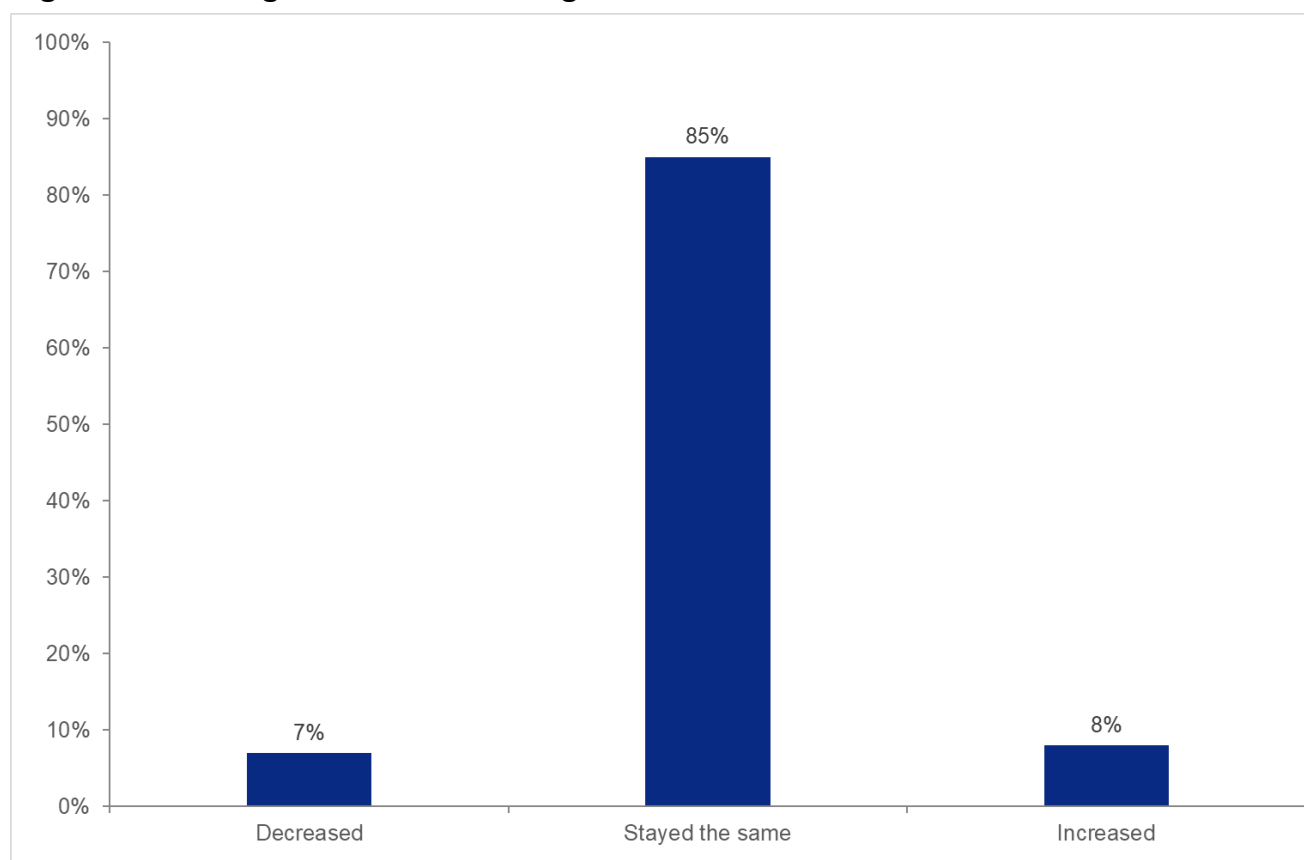
Number of respondents: 515.

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

Home Working

- 2.10. Most businesses said levels of homeworking have stayed the same compared to pre-pandemic levels (85%), while 7% said it decreased and 8% said it increased.
- 2.11. Of the small number that said homeworking has increased, 62% said that it had led to a decrease in productivity and 16% said it had increased productivity. 54% of these respondents also said increased homeworking has led to a decrease in commercial office and meeting space, while just 8% said it increased demand.
- 2.12. 19% of businesses said they are encouraging at least some staff who have been working from home to return to the workplace, 1% said they will do in the future, 11% said they have not and 68% said they do not have staff working from home.

Figure 2.4: Changes in home working



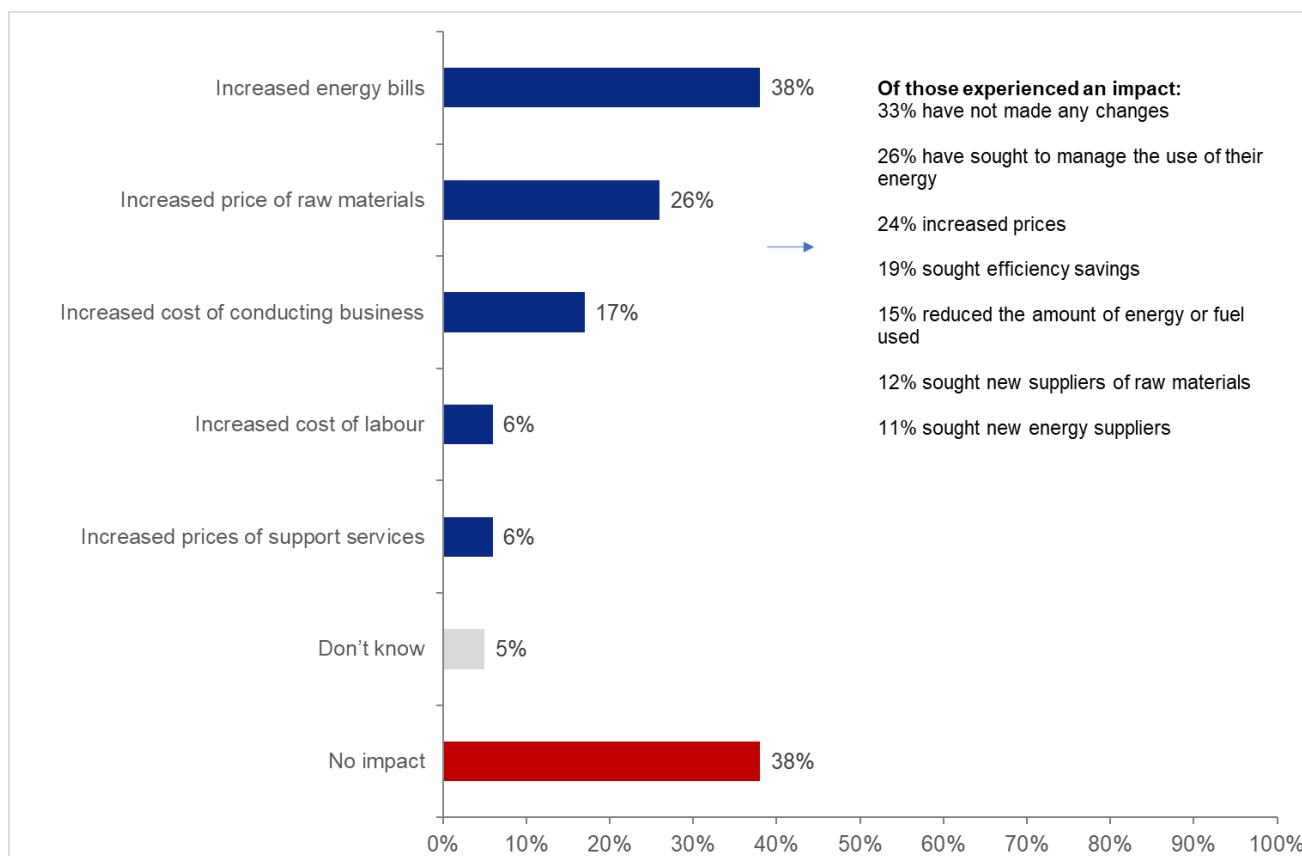
Number of respondents: 503.

Question asked: Compared to pre-pandemic levels, over the past 12 months, has the proportion of your workforce working from home/remotely decreased, stayed the same or increased?

Energy prices

- 2.13. 38% of businesses said there has not been an impact on their business of the rise in energy prices and 5% said they do not know. This indicates that 57% of businesses are impacted by the rise in energy prices.
- 2.14. 38% of businesses said they have experienced increased energy prices and 26% an increase in the price of raw materials, while 17% said it has increased the cost of doing business.
- 2.15. Impact is greater amongst larger businesses, with 55% of businesses with 0 to 4 employees stating they experienced an impact, compared with 62% of businesses with 5 to 19 employees and 66% of businesses with 20 or more employees.
- 2.16. Whilst a third of those that experienced an impact have not made any changes, 24% of have increased prices and others have sought to reduce costs by making changes to their use of energy, making efficiency savings and/or seeking new suppliers.

Figure 2.5: Impact of energy prices



Number of respondents: 516.

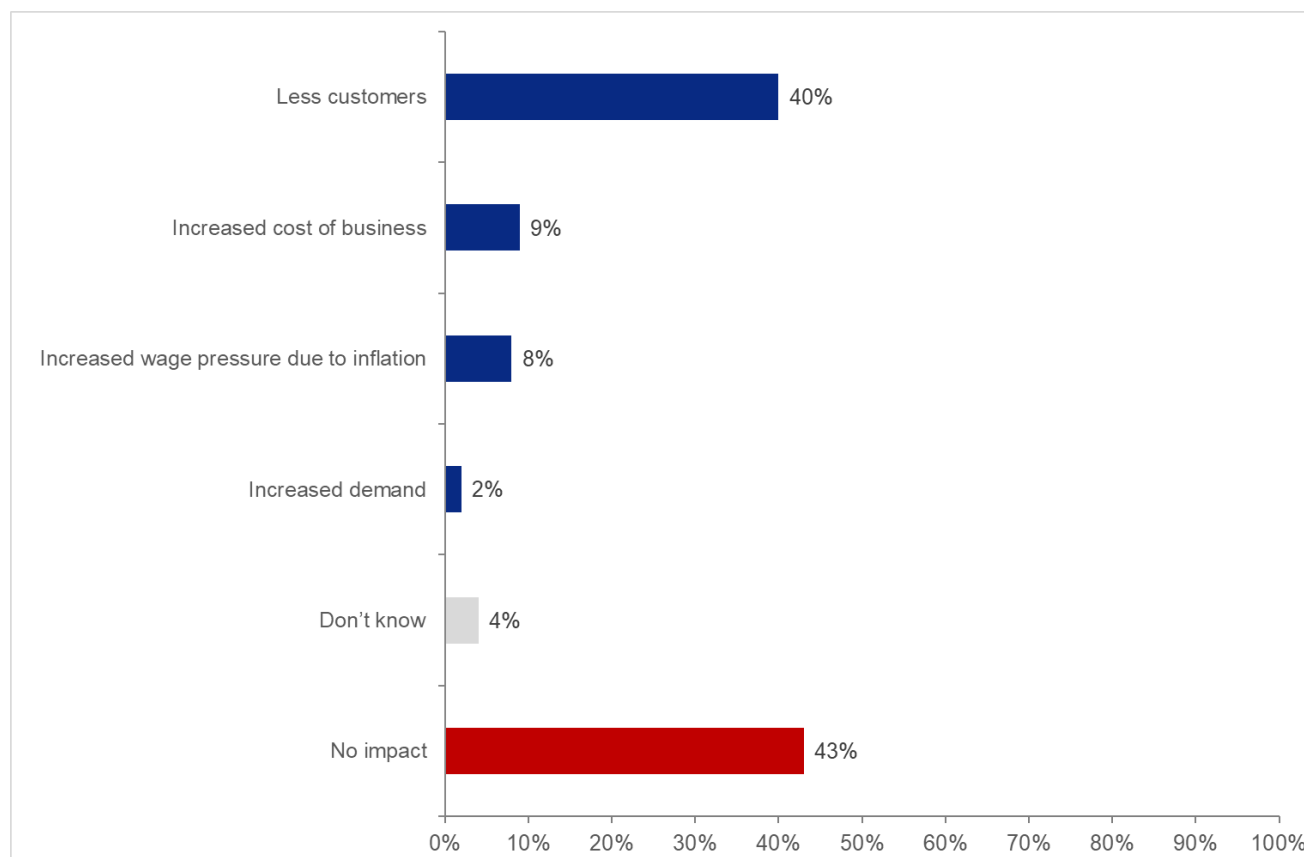
Question asked: What, if anything, has been the impact of the increase in energy prices on your business?

Note: Respondents could select multiple responses.

Cost of living

- 2.17. 43% of businesses said there has not been an impact on their business of the cost of living crisis and 4% said they do not know. This indicates that 53% of businesses are impacted by the cost of living crisis.
- 2.18. 40% of businesses said the cost of living crisis has led to less customers, 9% said it has increased the cost of business and 8% said it has increased wage pressure.
- 2.19. Impact is greater amongst larger businesses, with 65% of businesses with 20 or more staff experiencing an impact, compared with 52% of smaller businesses.

Figure 2.6: Impact of cost of living



Number of respondents: 514.

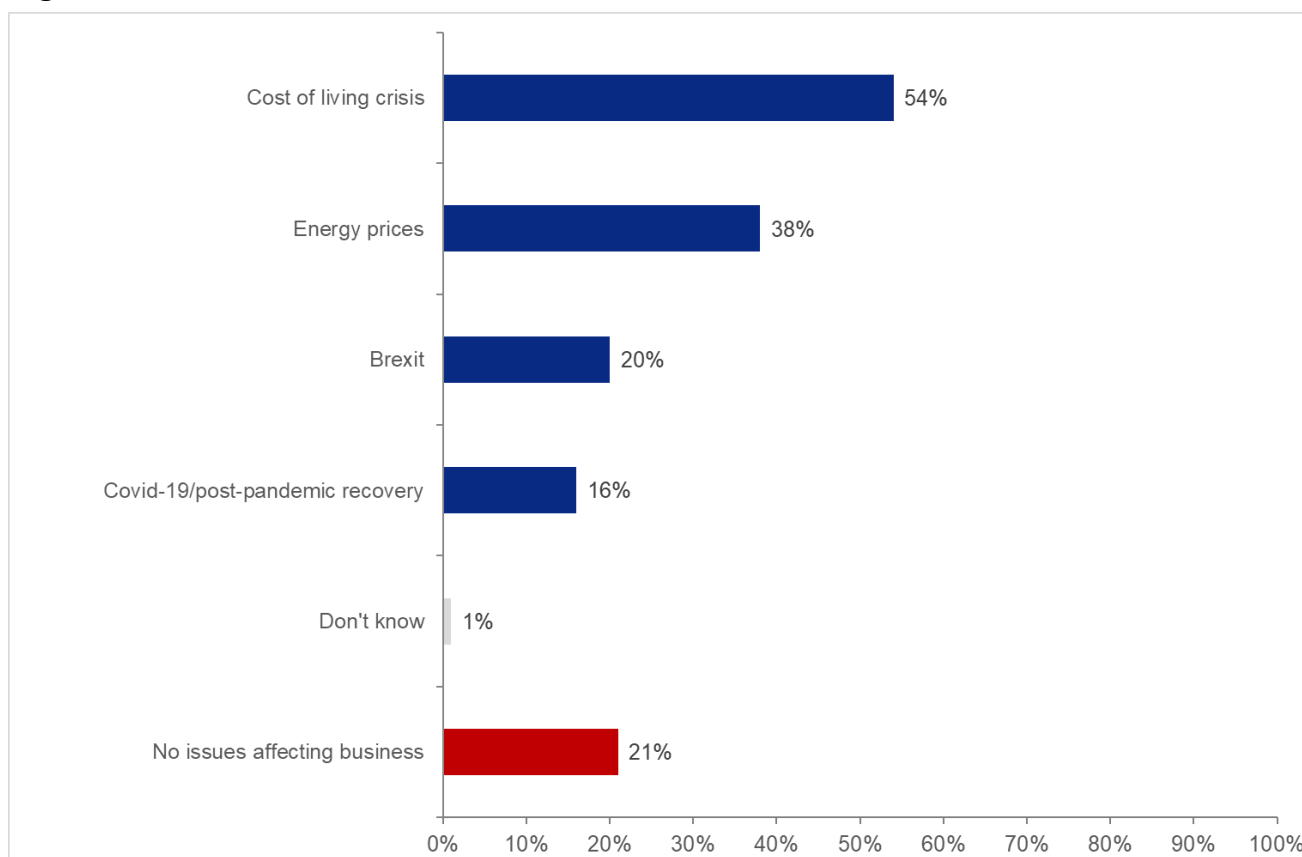
Question asked: What, if anything, has been the impact of the current cost of living crisis on your business?

Note: Respondents could select multiple responses.

Economic issues

- 2.20. A fifth of businesses (21%) said they are not affected by current economic conditions or issues.
- 2.21. Over half (54%) said they are affected by the cost of living crisis and 38% said the energy prices. 20% mentioned Brexit and 16% said the post-pandemic recovery.
- 2.22. Approximately, 2-3% said each of the following: 'general economic conditions', 'uncertainty with the Government' and 'the war in Ukraine'.
- 2.23. Larger businesses are more likely to say there are issues compared with smaller businesses – Just 11% of businesses with 20 or more staff said there are not any issues, compared with 21% of other businesses.

Figure 2.7: Main economic issues



Number of respondents: 516.

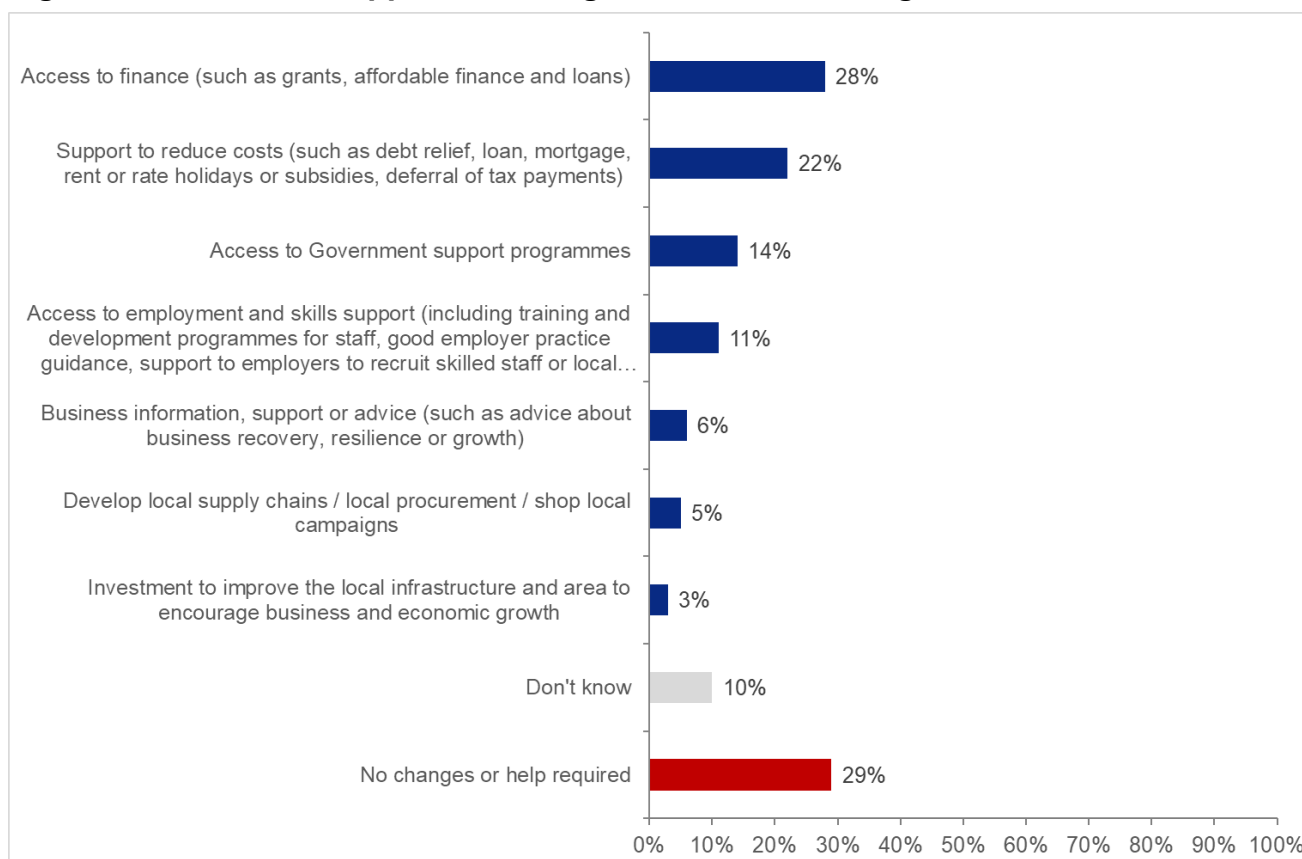
Question asked: What are the main economic issues that are affecting your business's performance and growth?

Note: Respondents could select multiple responses.

Business support

- 2.24. 28% of businesses said they wanted access to finance to help manage the current economic challenges, 22% said they wanted support to reduce costs and 14% mentioned access to Government support.
- 2.25. 11% mentioned access to employment and skills support, 6% business information, support or advice, 5% mentioned developing local supply chains and encouraging residents to shop local (mentioned spontaneously in the 'other' comments) and 3% mentioned investment to improve local infrastructure.
- 2.26. 29% said they did not need any help or support, which was more likely to be mentioned by businesses that do not consider there to be any notable challenges for their business currently.
- 2.27. Larger businesses are more likely to want business support – just 10% of businesses with 20 or more employees said they did not want support compared with 21% with 5 to 19 employees and 32% with 0 to 4 employees. Larger businesses are most interested in access to finance and also access to employment and skills support.

Figure 2.8: Business support to manage economic challenges



Number of respondents: 515.

Question asked: What, if anything, would help your business and the local economy deal with the current economic challenges?

Note: Respondents could select multiple responses.

Section 3: Brexit

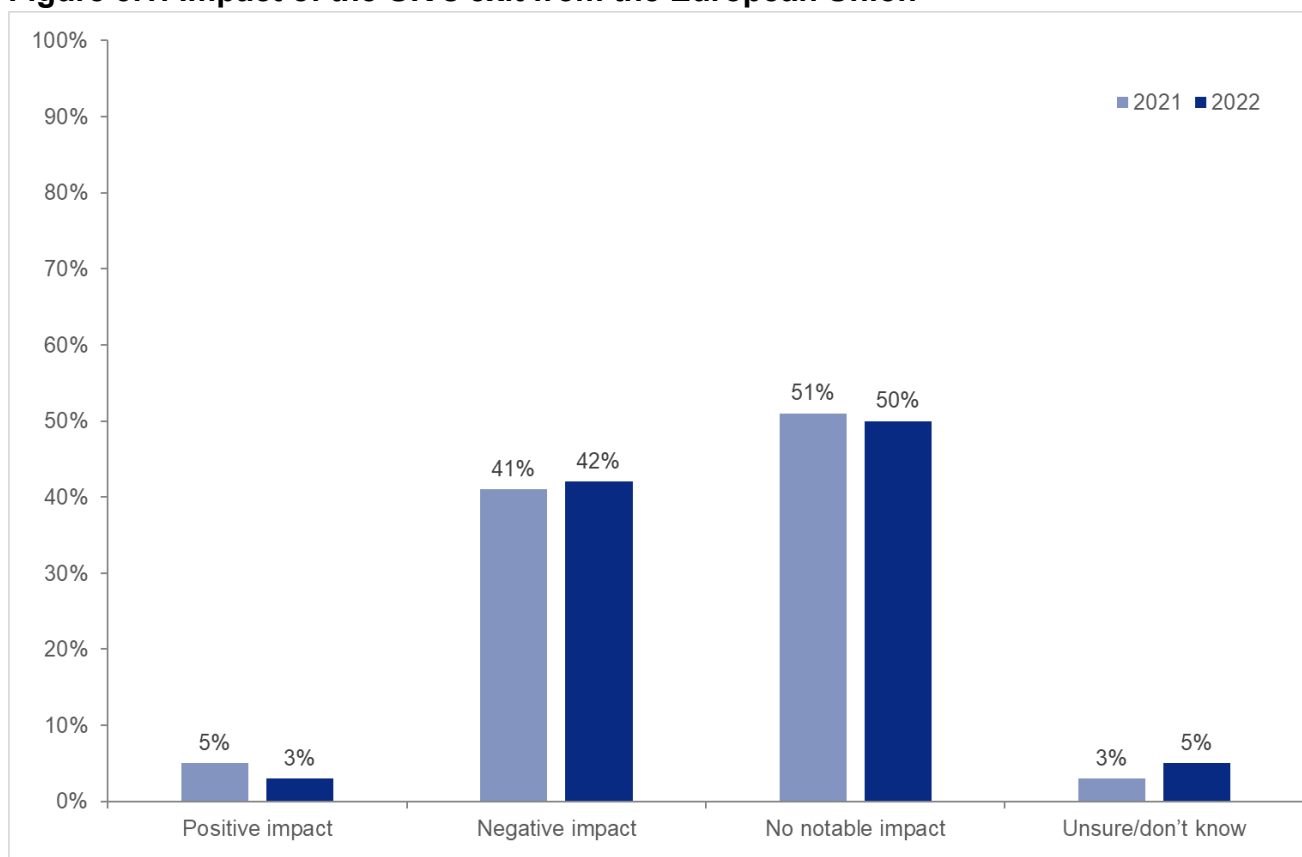
Introduction

- 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.

Impact of leaving the European Union

- 3.3. The results almost mirror those from 2021 highlighting sustained impact, with 42% of businesses stating that leaving the EU has had a longer term negative impact, half no notable impact and only 3% said it has had a positive impact.
- 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 (prior to the end of the transition period), 23% had anticipated a negative impact.
- 3.5. Larger businesses are more likely to state a negative impact – 56% of businesses with 20 or more employees said Brexit has had a longer term impact on their business compared with 41% of other businesses.
- 3.6. The small number of businesses that said leaving the EU is positive mentioned, similar to 2021, that this is because it has reduced red tape and provides more opportunities for UK suppliers to support UK based businesses.

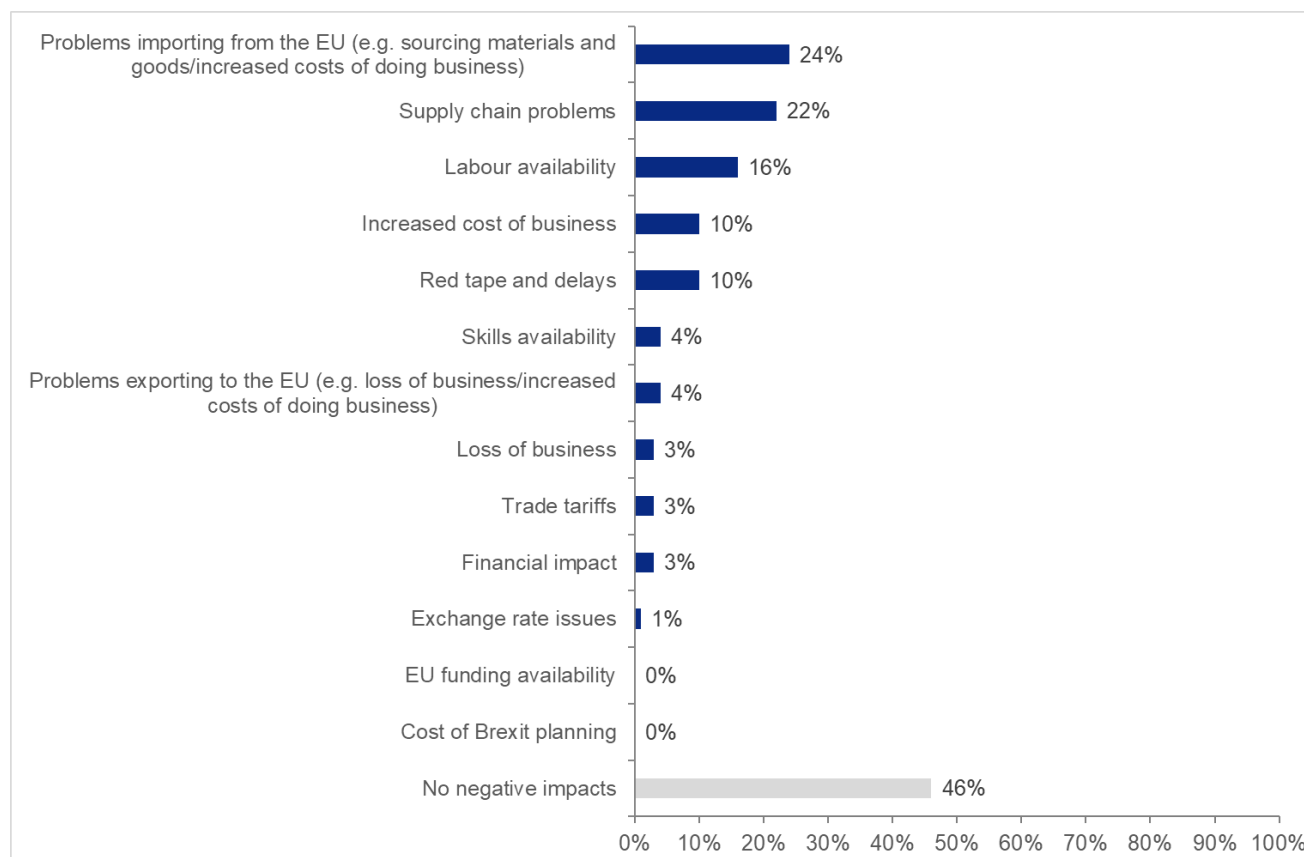
Figure 3.1: Impact of the UK's exit from the European Union



Number of respondents: 516. Question asked: Overall, has the long-term impact on your business of the UK leaving the European been positive, negative or neither?

- 3.7. Similar with 2021, problems importing from the EU was the most common negative impact for businesses, with 24% saying this is a key issue for them. Supply chain problems are an issue for 22%, 16% said labour availability is an issue and 10% stated the increased cost of business.
- 3.8. Problems importing from the EU, supply chain issues and labour availability are particular issues for larger businesses.
- 3.9. 10% mentioned red tape and delays spontaneously through the 'other' comments.
- 3.10. Almost half of businesses (46%) did not mention any negative impacts of leaving the EU on their business.

Figure 3.2: Negative impacts of leaving the EU



Number of respondents: 512.

Question asked: What have been the main negative long-term or sustained impacts, if any, that you have seen on your business of the UK leaving the EU?

Note: Respondents could select multiple responses.

Section 4: Recruitment, Skills, Retention and Training

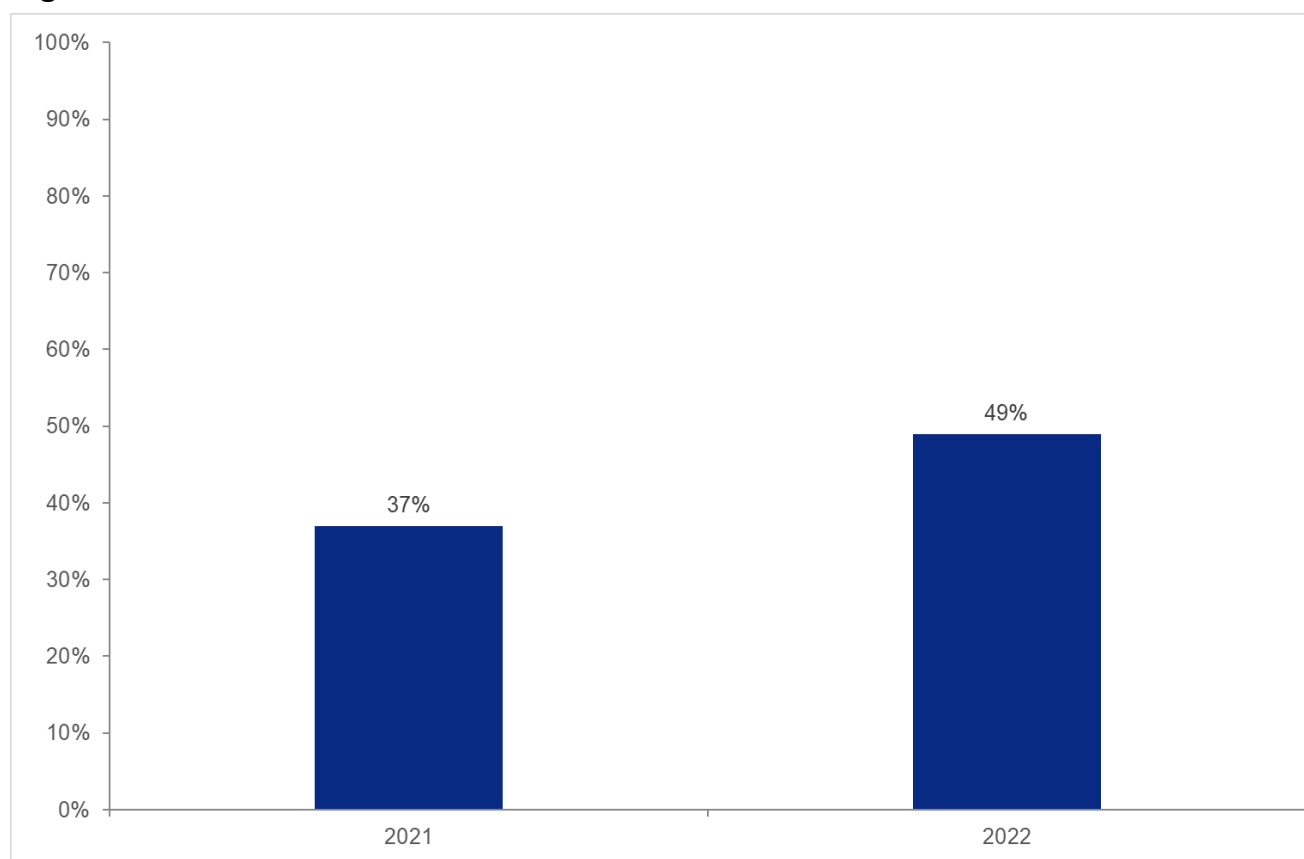
Introduction

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, retention issues and training.

Vacancies

- 4.2. Businesses reported a higher number of vacancies in 2022 (49%) than 2021 (37%), perhaps reflecting post-pandemic business growth as well as fluidity in the labour market. This compares to 31% of businesses who reported having had at least one vacancy in the 2020 Business Skills Survey.
- 4.3. Larger businesses are more likely to have vacancies - 100% of the businesses with 20+ employees have had a vacancy in the past 12 months, compared to 84% of businesses with 5 to 19 employees and 39% with 0 to 4 employees.

Figure 4.1: Businesses with vacancies in Bracknell Forest



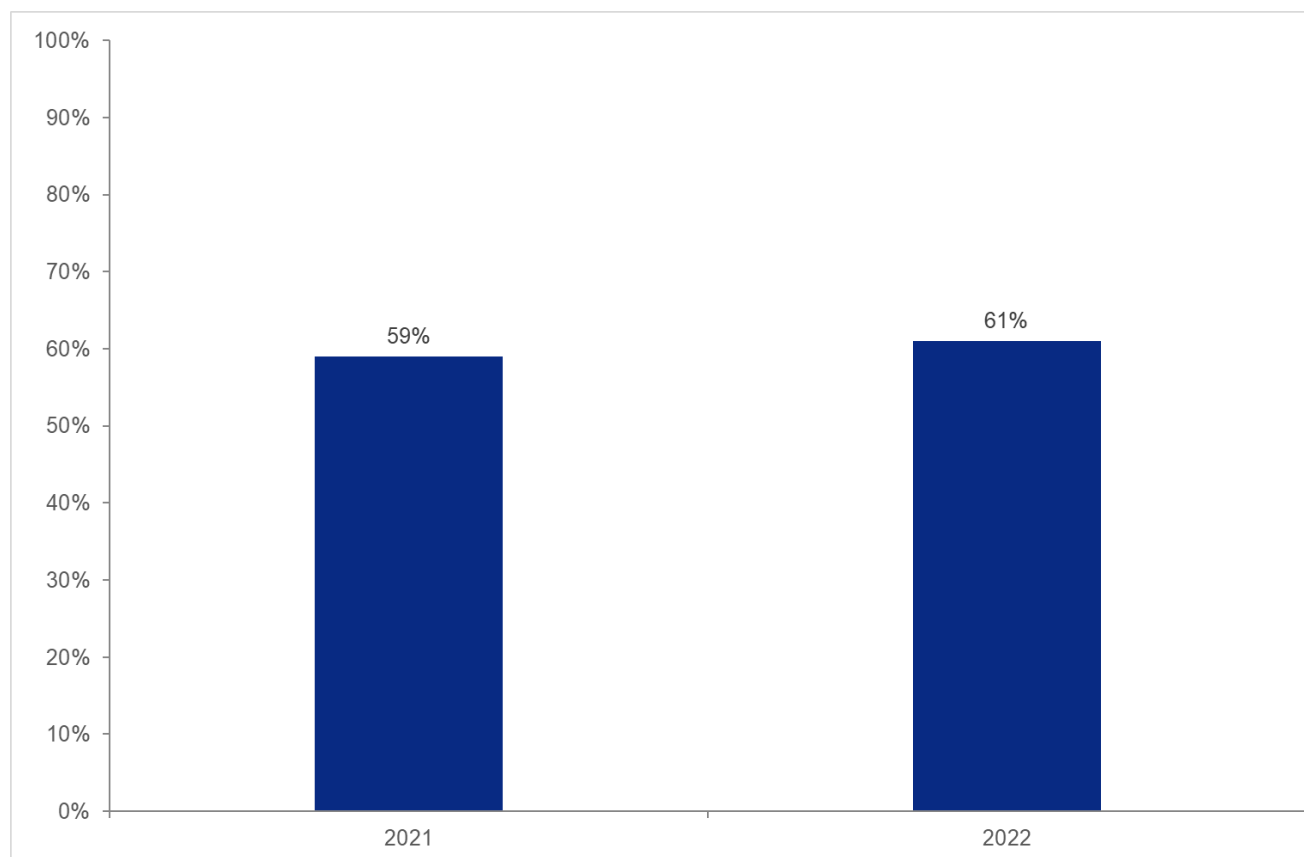
Number of respondents: 514.

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

Hard-to-fill-vacancies

- 4.4. 61% of businesses that had vacancies reported that they had found at least one of these vacancies hard to fill, equating to 30% of all businesses.
- 4.5. This compares to 59% of hard-to-fill vacancies in 2021 (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 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



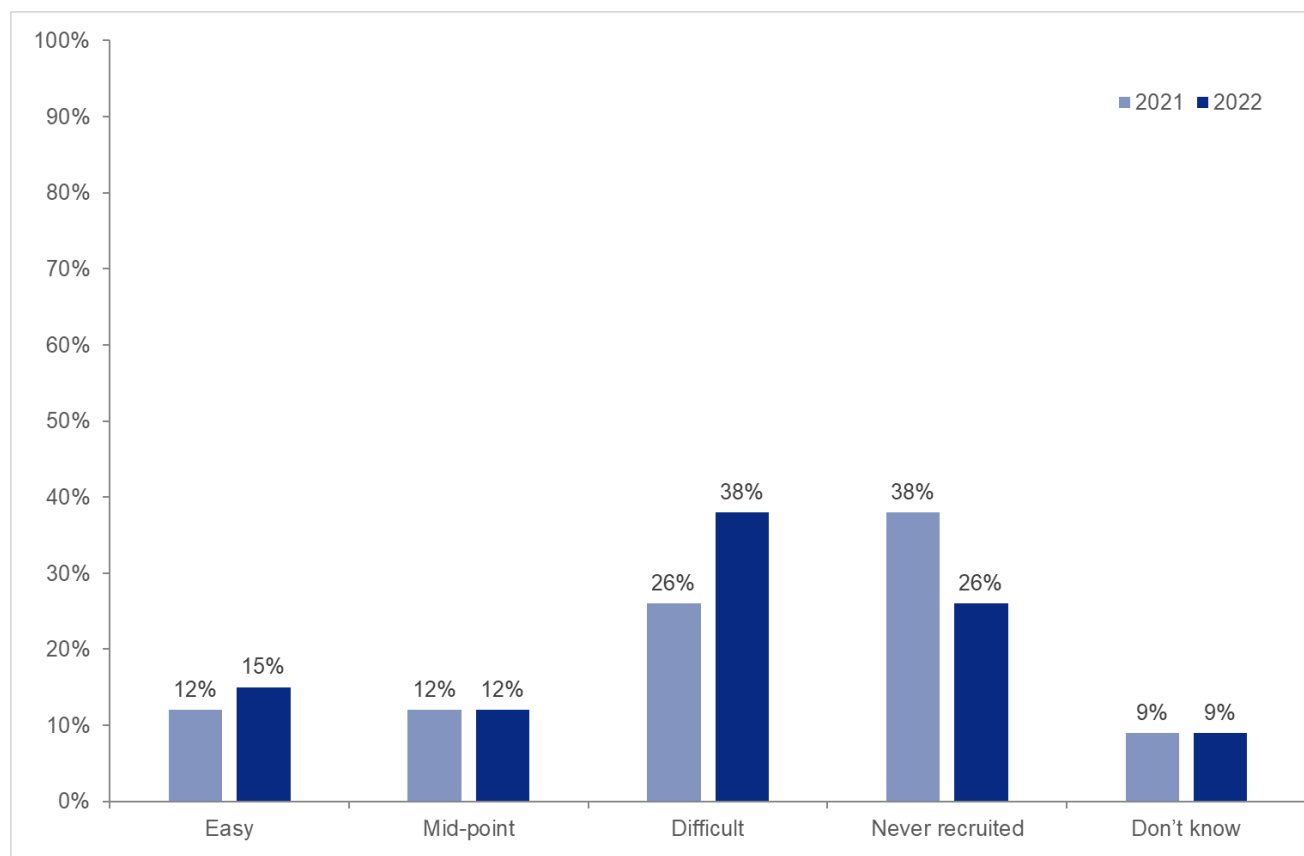
Number of respondents: 253 (only asked to businesses with vacancies in last 12 months).

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

- 4.6. 15% said that it was easy to recruit staff with the right skills and 38% said it was difficult. Once taking into account whether a business has recruited staff or not, the results are similar with those in 2021.
- 4.7. 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



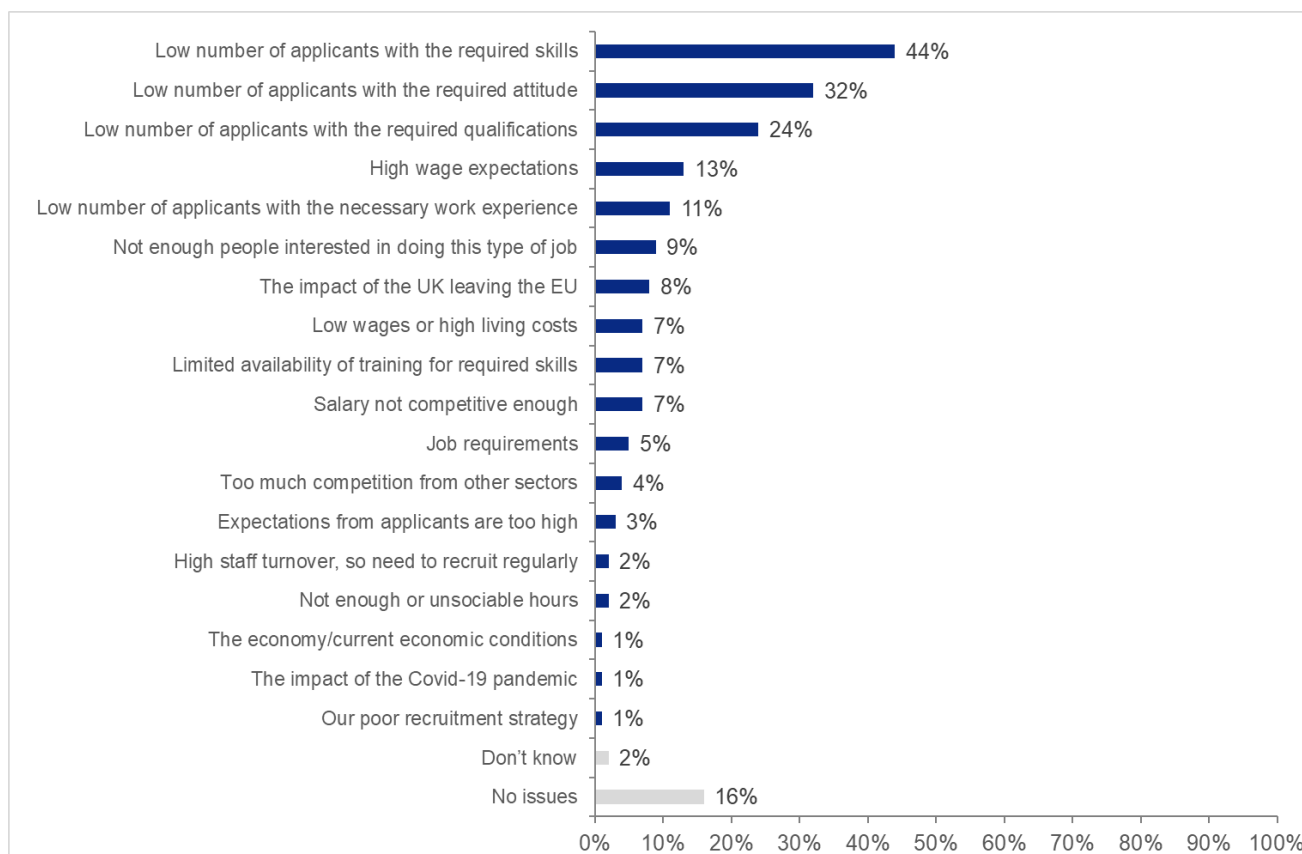
Number of respondents: 510.

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 right skills amongst new recruits

- 4.8. The main reason for difficulties finding recruits with the right skills was a low number of applicants with the required skills (44%). This was followed by a low number of applicants with the required attitude (32%) and a low number with the required qualifications (24%). These are the same top cited reasons as in 2021.
- 4.9. 8% of businesses cited Brexit (11% in 2021). Just 1% mentioned the pandemic, compared to 9% in 2021.
- 4.10. Businesses with 20 or more staff were more likely to mention a low number of applicants with the required skills - 63% of businesses with 20 or more staff mentioned this, compared with 42% of other businesses.

Figure 4.4: Reasons for difficulties in finding right skills amongst new recruits



Number of respondents: 325 (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?

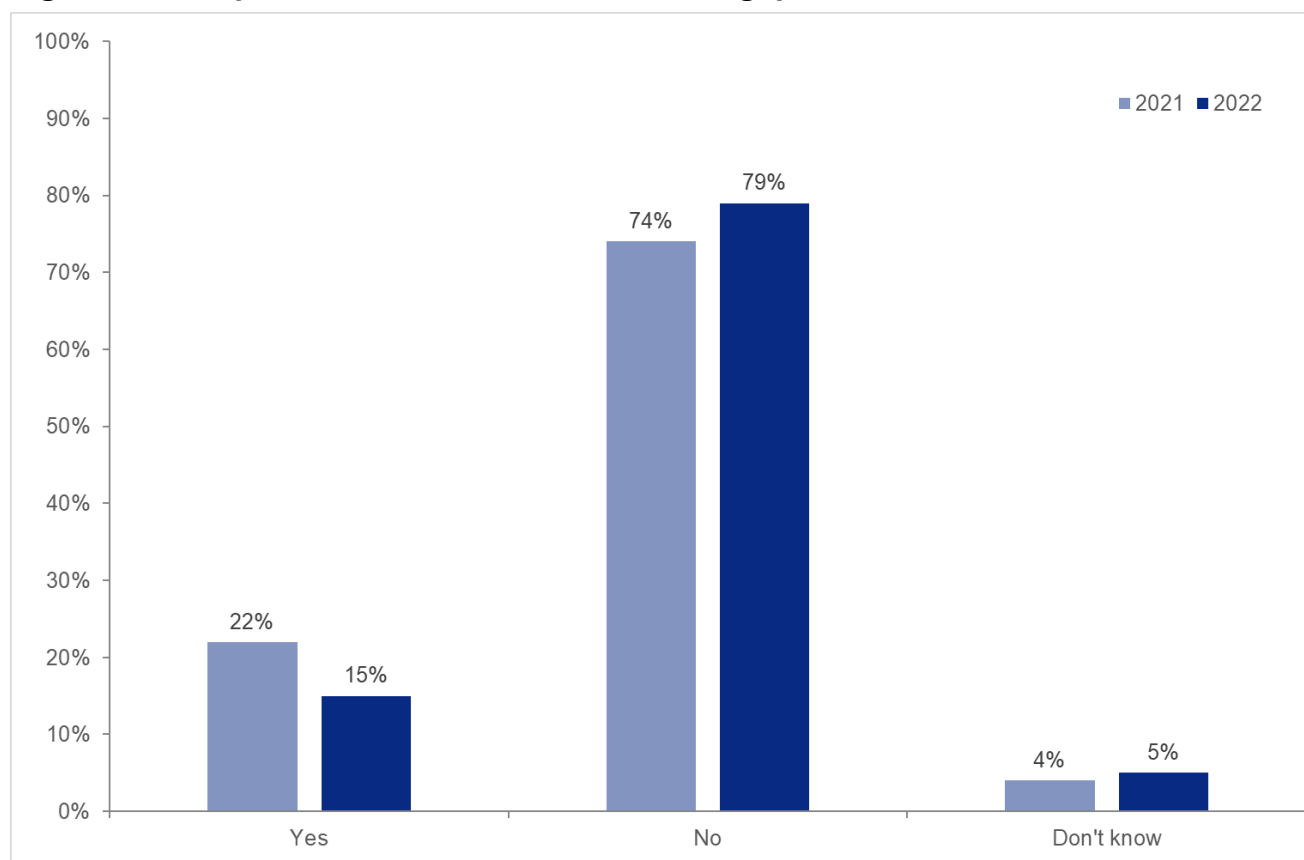
Note: Respondents could select multiple responses.

Skills gaps within existing workforce

4.11. 15% of businesses with staff have skills gaps and 79% do not.

4.12. This is a slightly more positive picture than in 2021 where 22% of businesses said they had skills gaps and similar to results in 2020 (85% did not have skills gaps).

Figure 4.5: Proportion of businesses with skills gaps in Bracknell Forest

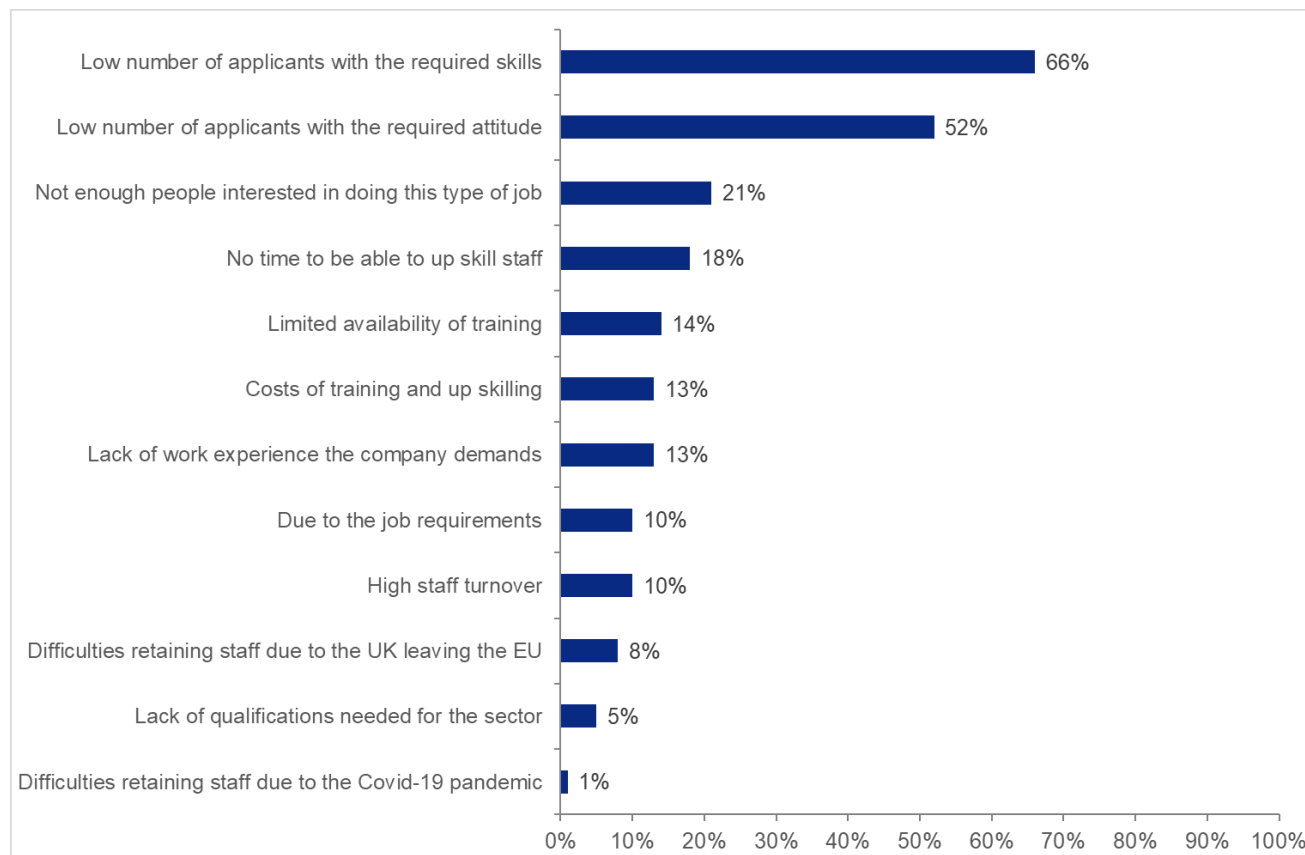


Number of respondents: 337. Excludes 'not applicable – do not have any staff' responses for comparability with previous data.

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. The main reason cited for skills gaps in existing workforces is a lack of skills and attitudes, with some also mentioning training related issues.

Figure 4.6: Reasons for experiencing skills gaps in current workforce



Number of respondents: 52 (only asked to businesses that have skills gaps).

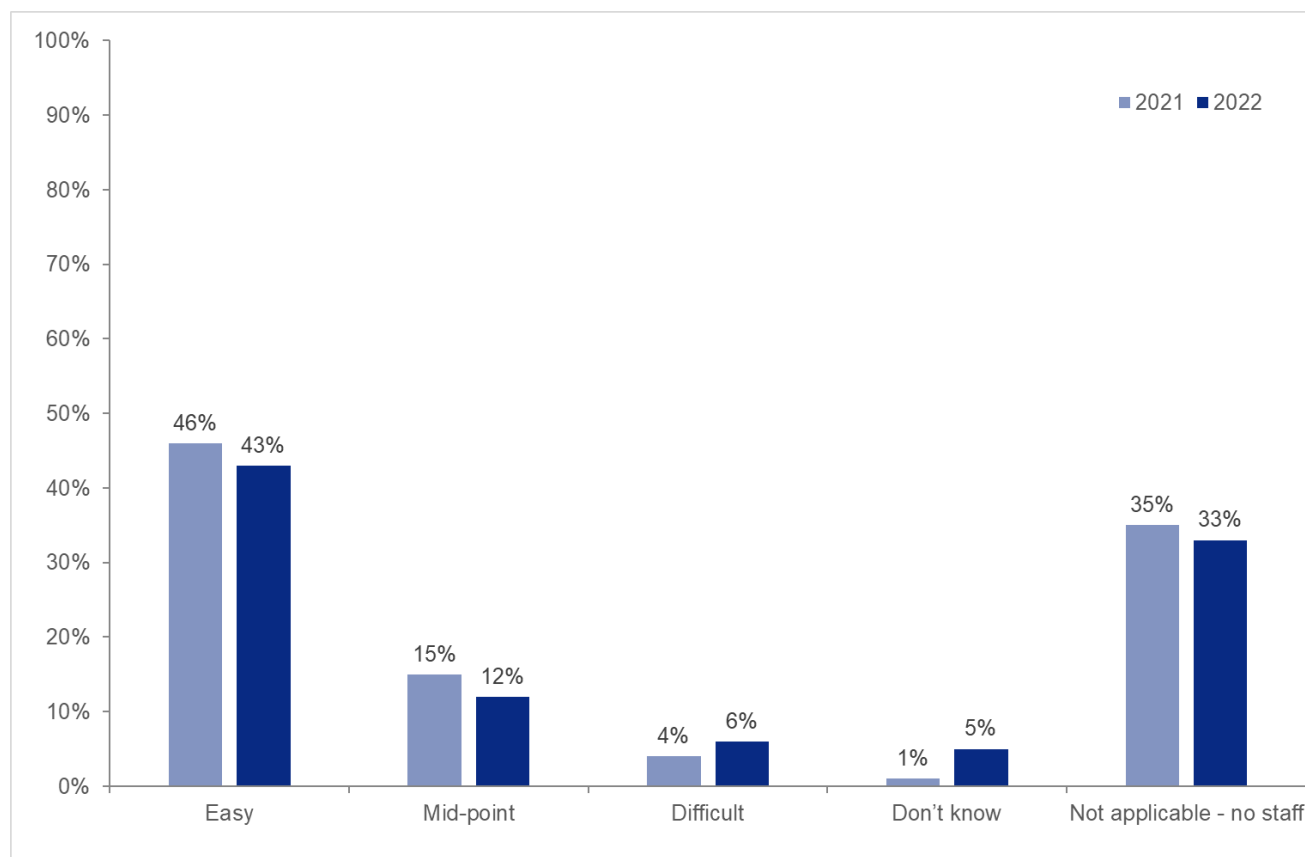
Question asked: In general, why would you say you are experiencing skills gaps amongst your current workforce?

Note: Respondents could select multiple responses.

Ability to retain staff in Bracknell Forest

- 4.14. 43% of businesses mentioned that they found it easy to retain staff in Bracknell Forest. A third of businesses mentioned they do not have any staff to retain. Just 6% said it is difficult to retain staff.
- 4.15. This is similar to the figures seen in the 2021 survey and 2020 Business Skills Survey (when 51% of businesses mentioned that they found it easy to retain staff in Bracknell Forest and 37% of businesses mentioned they do not have any staff to retain).

Figure 4.7: Ability to retain staff in Bracknell Forest



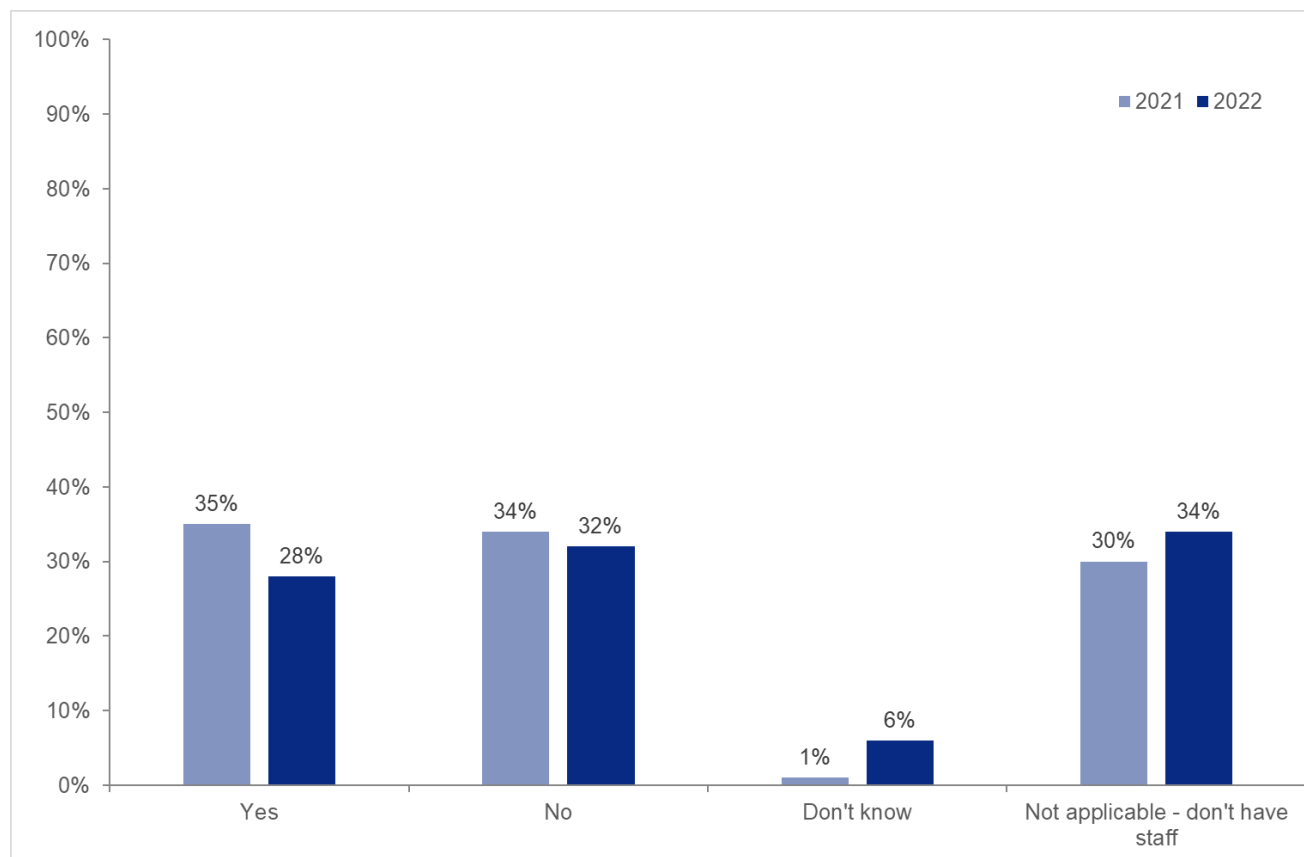
Number of respondents: 515.

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?

Benefit of training

- 4.16. 28% of businesses said their workforce would benefit from training to improve their skills and 32% said they would not (with 34% not having any employees).
- 4.17. Businesses with skills gaps in their existing workforce were more likely to state their staff would benefit from training – cited by 86% of these businesses.
- 4.18. The results are similar to 2021, once the proportion of businesses with staff and don't know responses are taken into account.

Figure 4.8: Proportion of businesses benefiting from skills training



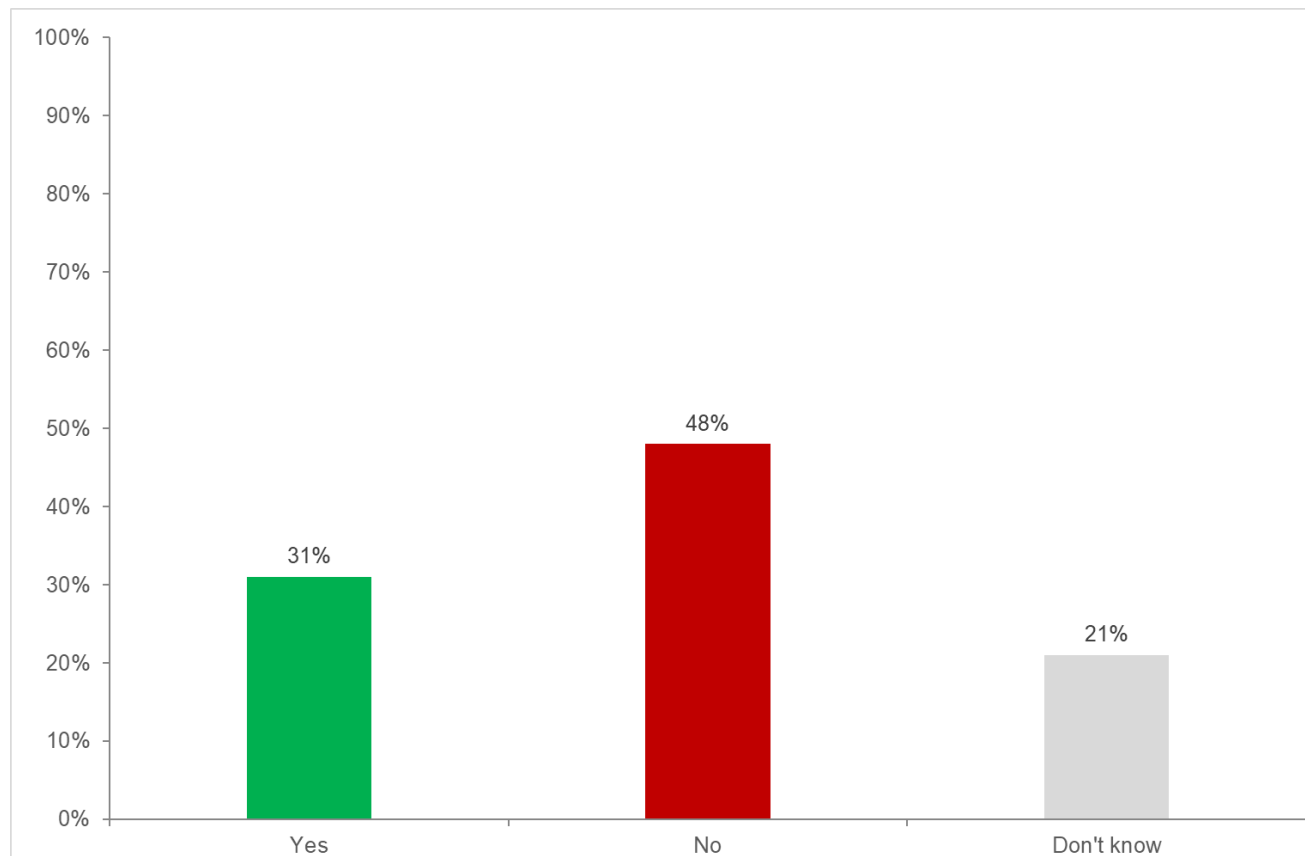
Number of respondents: 511.

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

Training and development service

- 4.19. 31% of businesses said they would be interested in a Bracknell-based training and development service.
- 4.20. Interest is greatest amongst larger businesses, with 78% of businesses with 20 or more staff interested compared with 27% of smaller businesses.

Figure 4.9: Interest in a Bracknell-based training and development service



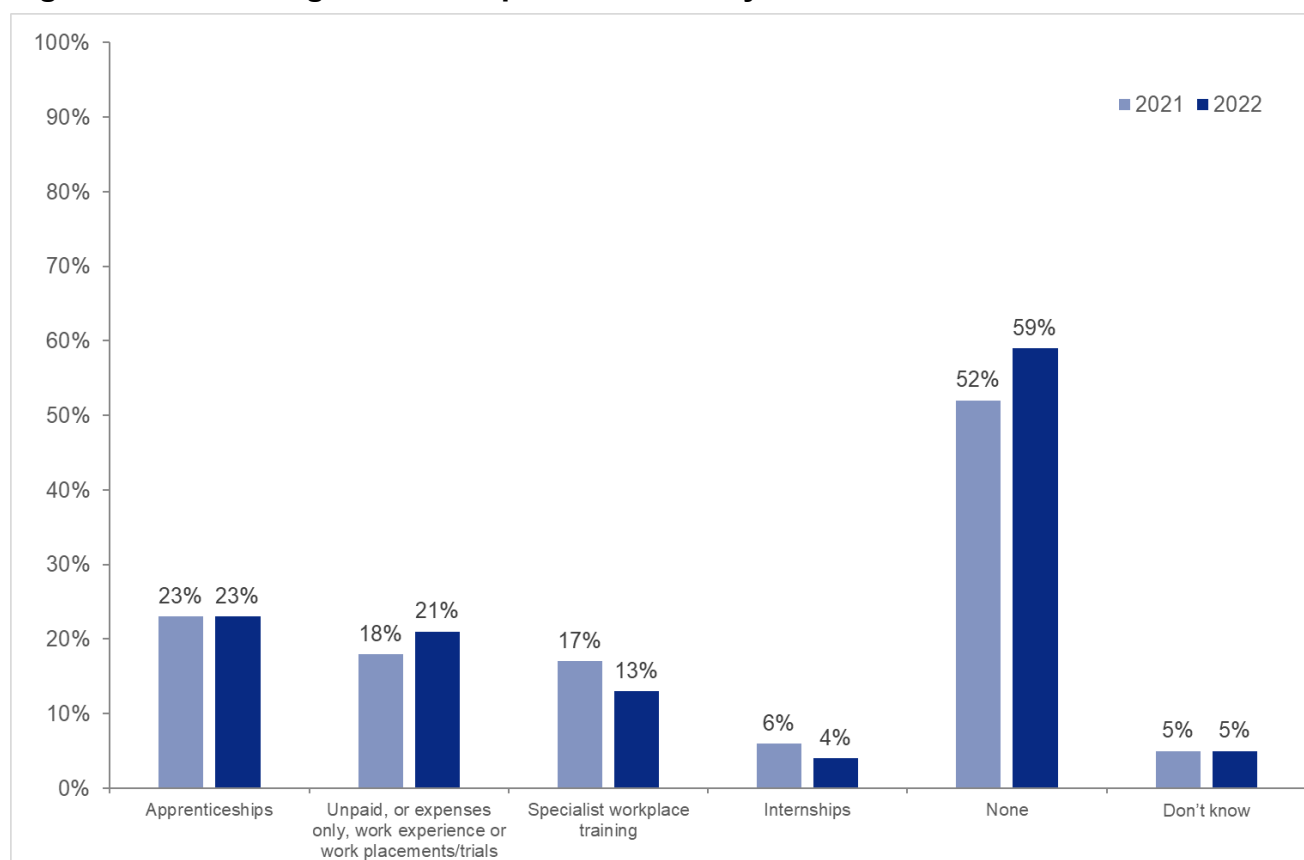
Number of respondents: 502.

Question asked: Would your business benefit from a Bracknell-based training and development service, such as a Skills and Training Hub, that liaises with businesses and training providers to help make it easier to access appropriate training and development opportunities?

Training and development offered

- 4.21. 59% of businesses said they do not offer any of the listed types of training and development. Apprenticeships are the most commonly offered type of training, mentioned by just under a quarter (23%) of businesses. 21% provided unpaid, or expenses only, work experience or work placements/trials.
- 4.22. Results are similar to those in 2021, although there is a slightly lower proportion of businesses that offer training in 2022 (59%) compared with 2021 (52%).
- 4.23. Larger businesses are more likely to offer training and development – only 12% of businesses with 20 or more staff do not offer training/development, compared with 45% of businesses with 5 to 19 staff and 65% with 0 to 4 staff that do not offer training/development.

Figure 4.10: Training and development offered by businesses



Number of respondents: 513.

Question asked: Which of the following does your organisation offer?

Note: Respondents could select multiple responses.

Section 5: Infrastructure

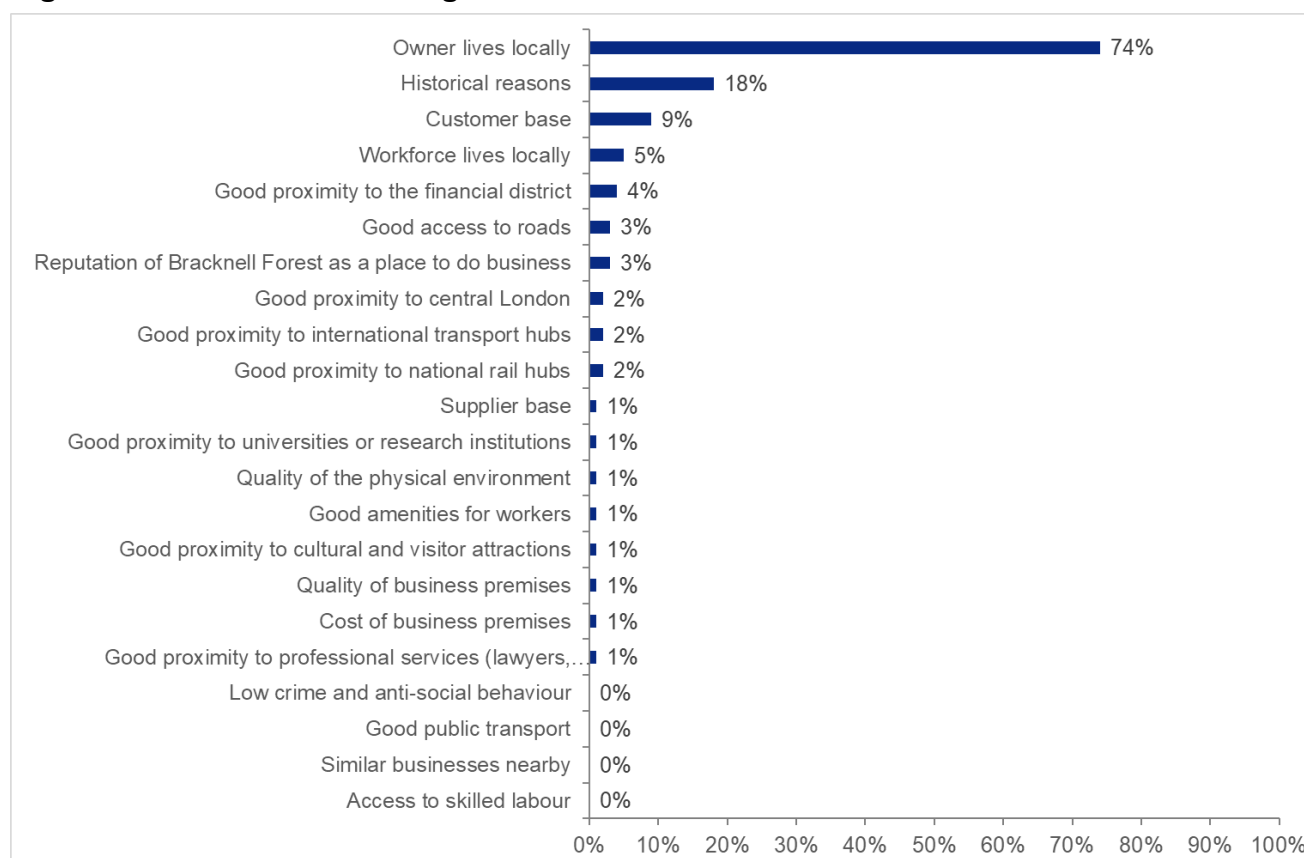
Introduction

5.1. 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

5.2. Almost three-quarters of businesses (74%) 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 2021 survey and 2020 Business Infrastructure Survey.

Figure 5.1: Reasons for being located in Bracknell Forest



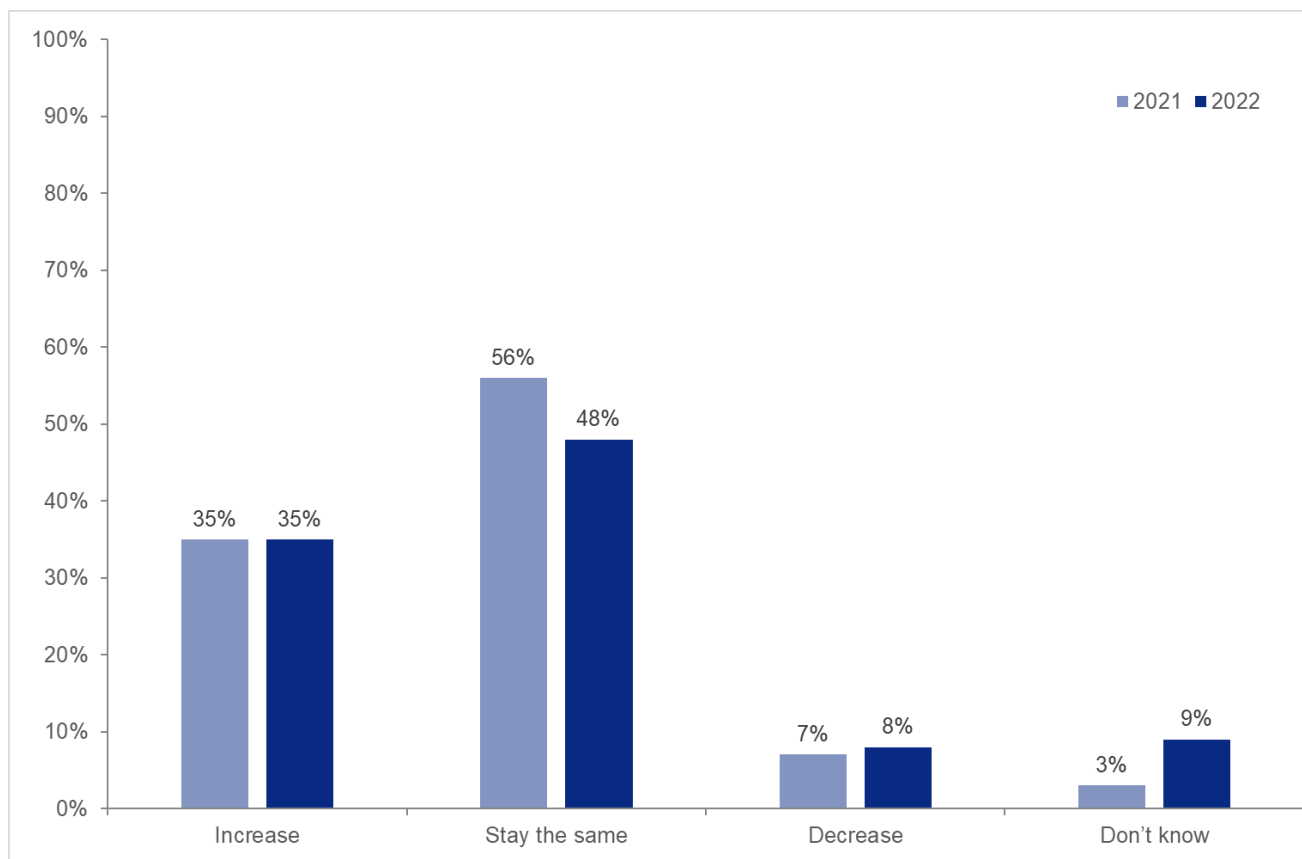
Number of respondents: 516.

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

Expected business operations in Bracknell Forest

- 5.3. As in 2021, 35% of businesses said they expect their operations in Bracknell Forest to increase. 48% said stay the same and 8% decrease.
- 5.4. Larger businesses are more likely to say that operations will increase – 60% of businesses with 20 or more staff said so, compared with 33% of other businesses.
- 5.5. Of those that expect their business to increase, most said they expected to increase turnover, customers and staff, which in a small number of cases may also lead to changing premises. 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, while a small number mentioned more home-working and less reliance on commercial premises/office space.

Figure 5.2: Expected size and scale of operations in Bracknell Forest over the next 3 years



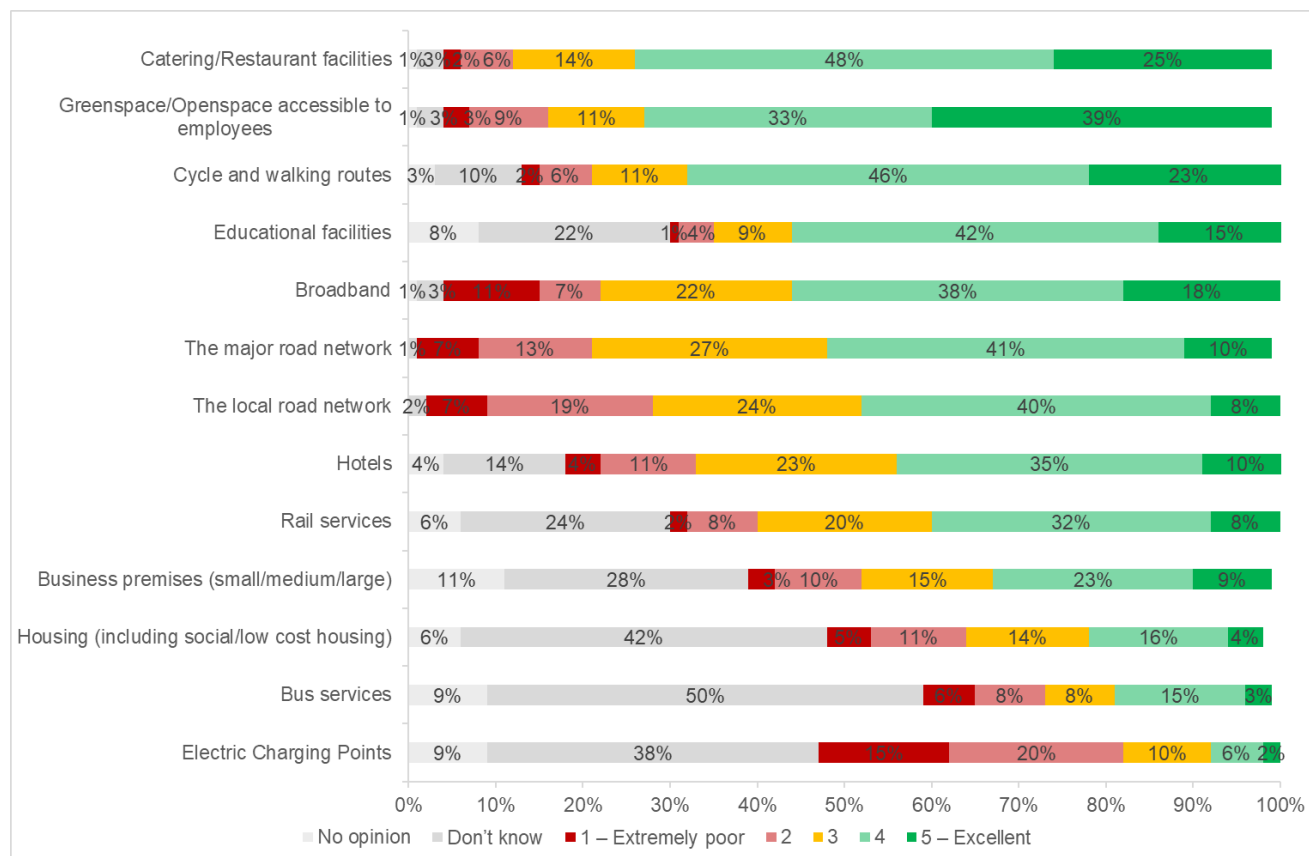
Number of respondents: 514.

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? This might include changes to business premises, employee numbers or outputs.

Ratings of the local infrastructure

- 5.6. 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.
- 5.7. As in 2021, Businesses gave predominantly positive ratings to catering and restaurant facilities (73%) and greenspace/openspace being accessible to employees (72%) (76% and 72% rated as good respectively in 2021).
- 5.8. Businesses were also generally positive about the cycle and walking routes, with 69% of businesses rating it good (66% in 2021).
- 5.9. Views on the educational facilities tended to also be positive on balance - 57% felt it was good (54% in 2021).
- 5.10. Views on broadband tended to also be positive on balance - 56% felt it was good (54% in 2021), although 18% rated it as poor (same as in 2021).
- 5.11. Views on major and local road networks were mixed as in the past – 51% rated major road networks as good and 20% as poor (43% good in 2021 and 22% poor). 48% rated the local road network as good and 26% poor (38% good and 24% poor in 2021).
- 5.12. 45% rated hotels as good (44% in 2021) and 15% poor (also 15% in 2021). 40% rated rail services as good (35% in 2021) and 10% as poor (13% in 2021).
- 5.13. 32% rated business premises as good (33% in 2021) and 13% poor (12% in 2021).
- 5.14. 20% rated housing as good (35% in 2021) and 16% as poor (20% in 2021).
- 5.15. 18% rated the bus service as good (20% in 2021) and 14% as poor (also 14% in 2021).
- 5.16. Just 8% of businesses said the availability of electric charging points is good (7% in 2021) and 35% said the availability is poor (39% in 2021).

Figure 5.3: Ratings of aspects of the local infrastructure



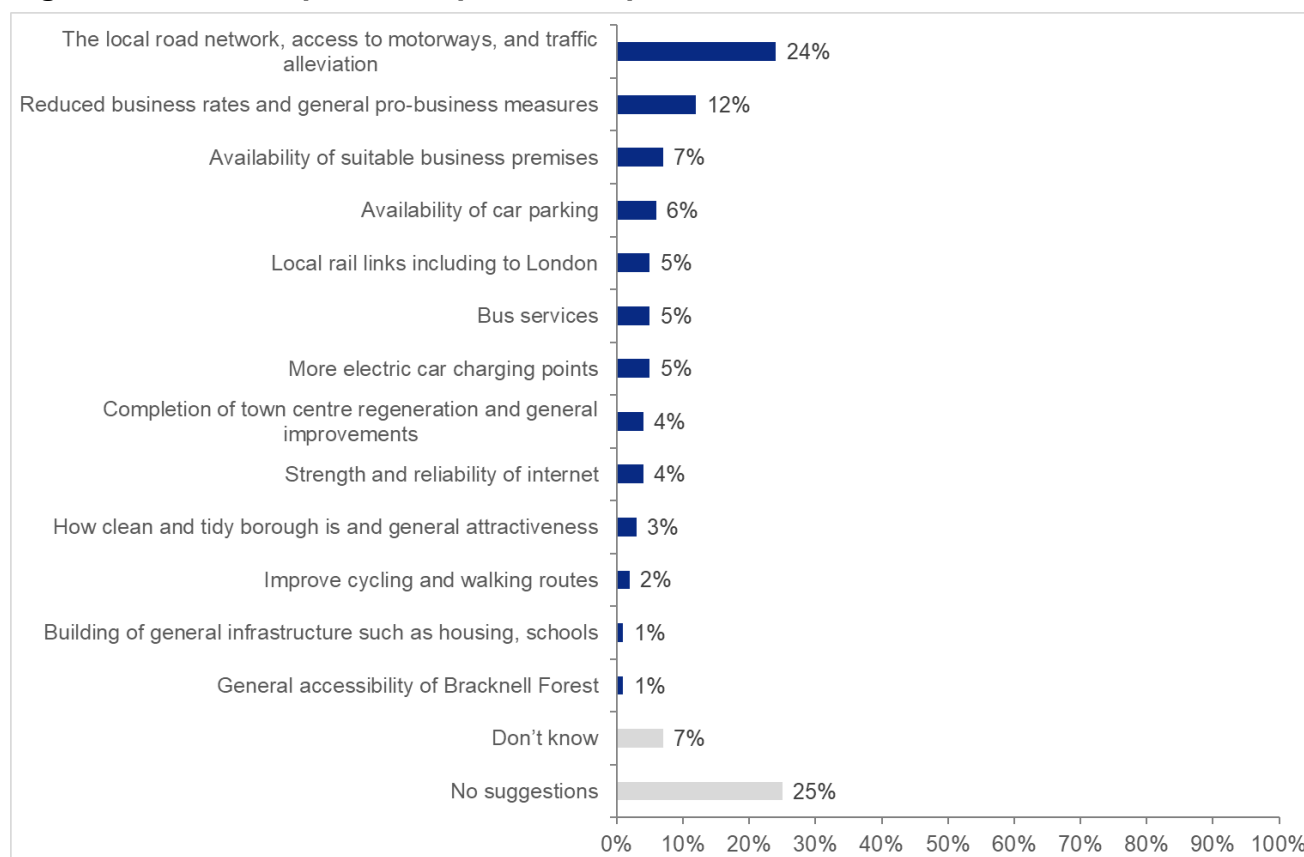
Number of respondents: 516.

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 aspects of local infrastructure in Bracknell Forest to improve

- 5.17. As in 2021, the most common aspect, mentioned by around a quarter, was the local road network, access to motorways, and traffic alleviation (24% in both 2022 and 2021).
- 5.18. The second most cited improvement is reduced business rates and general pro-business measures, cited by 12% of respondents (9% in 2021).
- 5.19. 6% of businesses cited availability of car parking, which is a decrease from 16% in 2021.
- 5.20. Approximately 5% mentioned more electric car charging points spontaneously in the 'other' comments.

Figure 5.4: Most important aspects to improve



Number of respondents: 514.

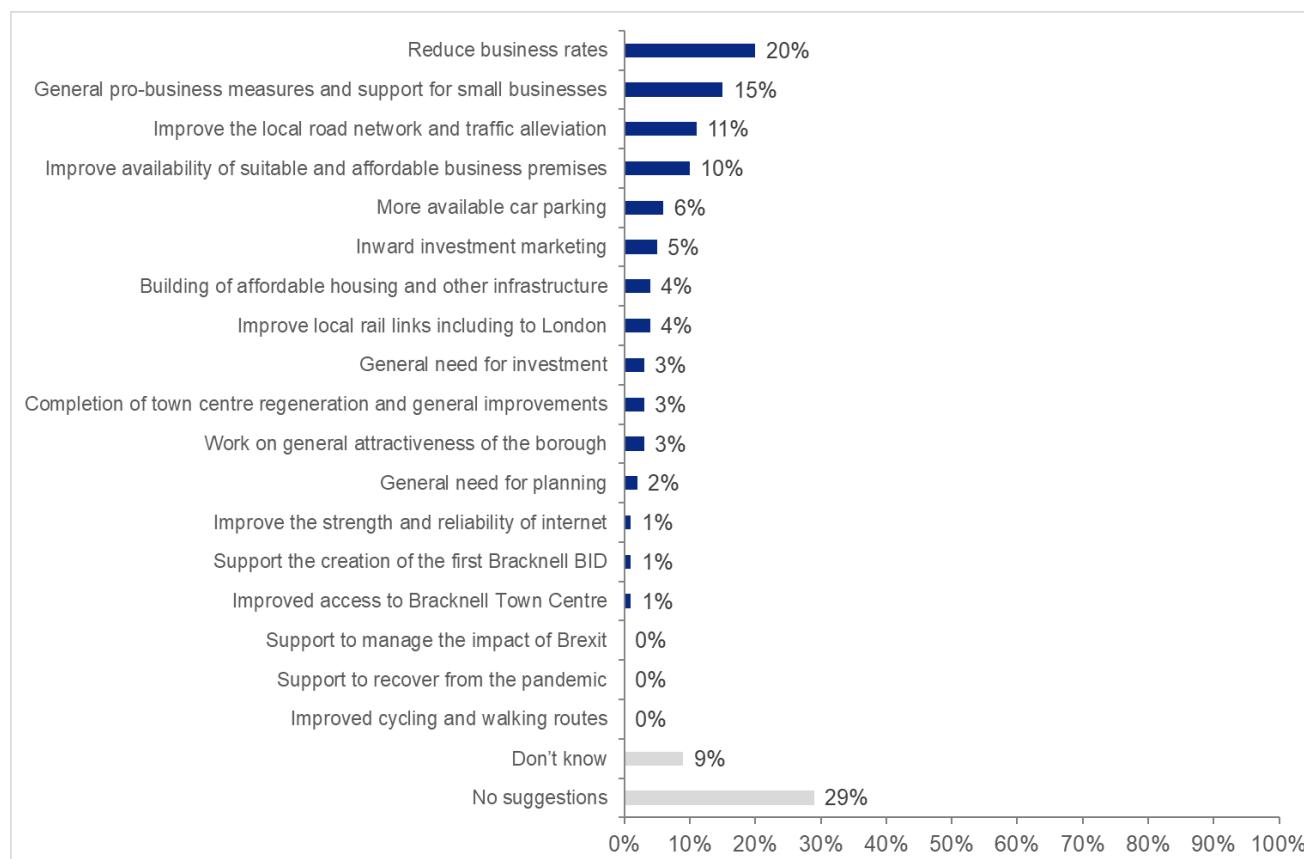
Question asked: What do you consider is the most important aspect of the local infrastructure in Bracknell Forest that should be improved to make it a better place to do business?

Note: Respondents could select multiple responses.

Infrastructure actions to grow the Bracknell Forest economy

- 5.21. Reducing business rates continues to be one of the most cited actions to support growth, mentioned by 20% of businesses (12% in 2021 and 20% in 2020).
- 5.22. General pro-business measures and support for small businesses was cited by 15% of businesses (8% in 2021 and 9% in 2020).
- 5.23. 11% of businesses mentioned improving the local road network and traffic alleviation (16% in 2021 and 19% in 2020).
- 5.24. More available car parking was mentioned by 10% of businesses (5% in the 2020 Business Infrastructure Survey).
- 5.25. 10% mentioned improving the availability of suitable and affordable business premises (6% in 2021 and 13% in 2020).
- 5.26. Approximately 5% mentioned inward investment marketing and promotion spontaneously in the 'other' comments.
- 5.27. In 2021, 4% mentioned support to help recover from the pandemic, which was not cited in 2022 and neither was support to manage the impact of Brexit.

Figure 5.5: Actions Council and partners could take to grow the Bracknell Forest economy



Number of respondents: 512.

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 multiple responses.

Section 6: Broadband

Introduction

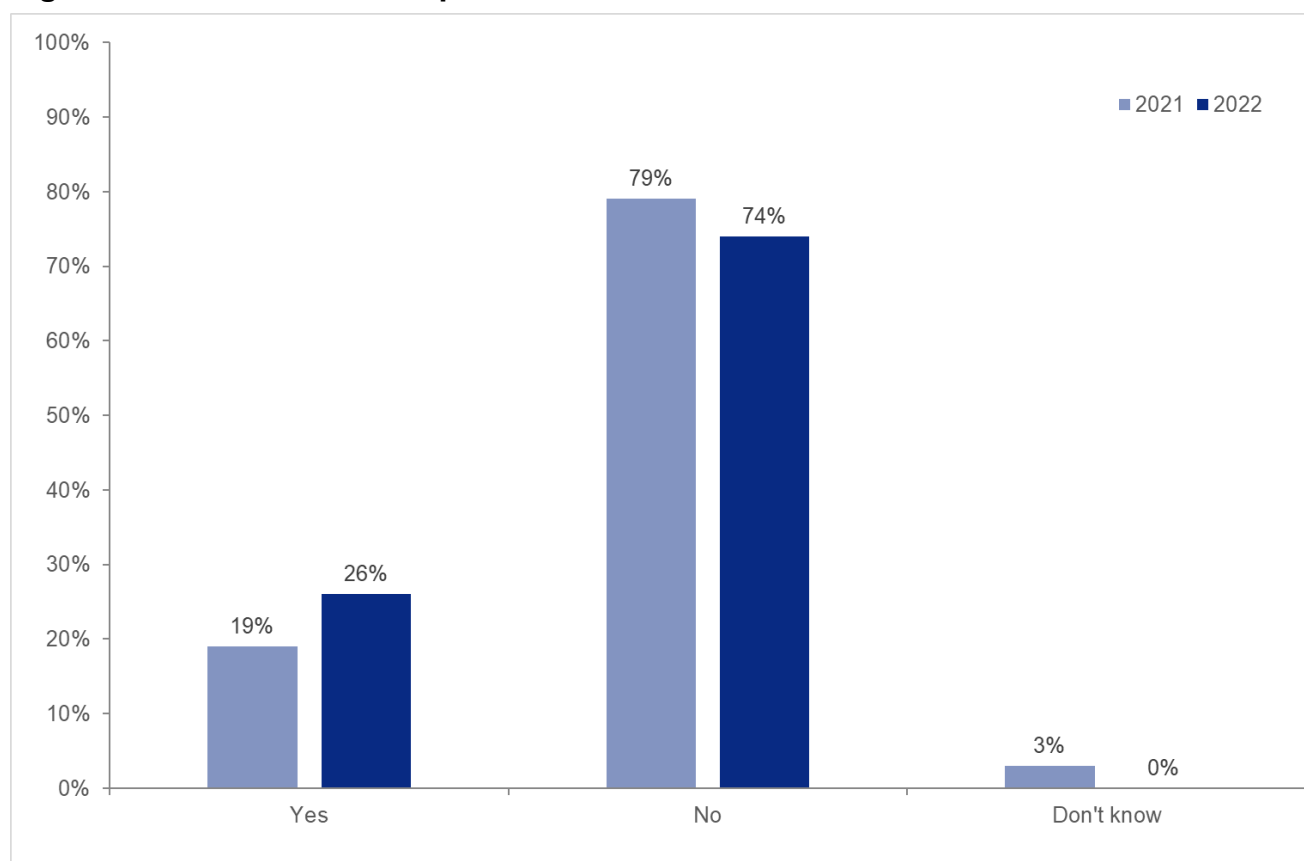
6.1. This section covers businesses' usage and perceptions of broadband and improvement initiatives.

Awareness of Superfast Berkshire

6.2. Whilst the majority of businesses remain not aware of Superfast Berkshire³, there has been a slight increase with 26% of businesses aware compared to 19% in 2021 (and 21% in 2020).

6.3. Awareness is higher amongst smaller businesses – 27% of businesses with under 20 staff are aware, compared with 8% of larger businesses.

Figure 6.1: Awareness of Superfast Berkshire



Number of respondents: 515.

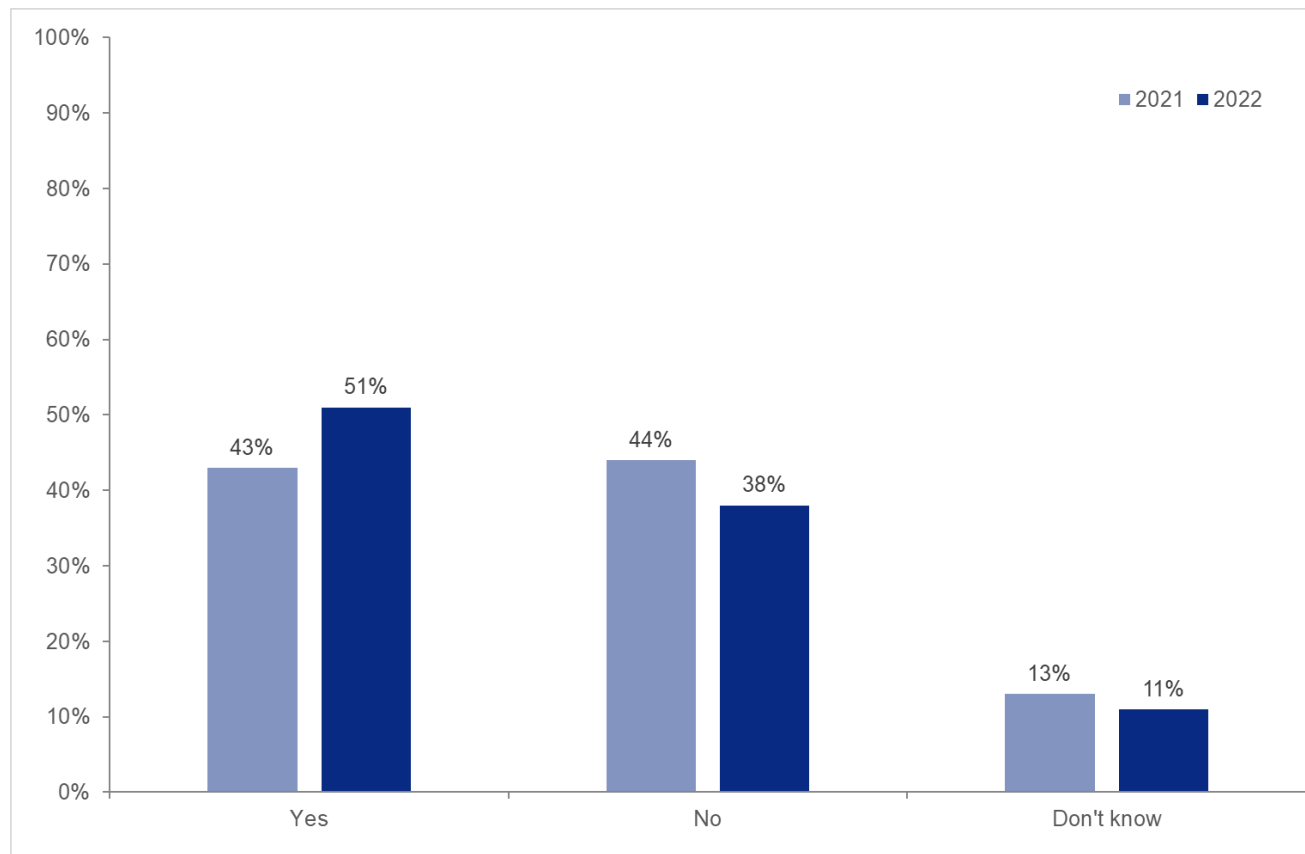
Question asked: Bracknell Forest Council is involved with a programme to improve broadband throughout Berkshire called Superfast Berkshire, which aims to ensure that 99% of Bracknell Forest have access to full-fibre broadband. Where you aware of this?

³ 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

- 6.4. 51% of businesses now have access to superfast/full-fibre broadband, which is an improvement on the 2021 figure (43%) and 2020 (40%).
- 6.5. Larger businesses of 20 or more staff are slightly more likely to have access to superfast broadband (61%), compared with smaller businesses (50%).

Figure 6.2: Access to superfast broadband



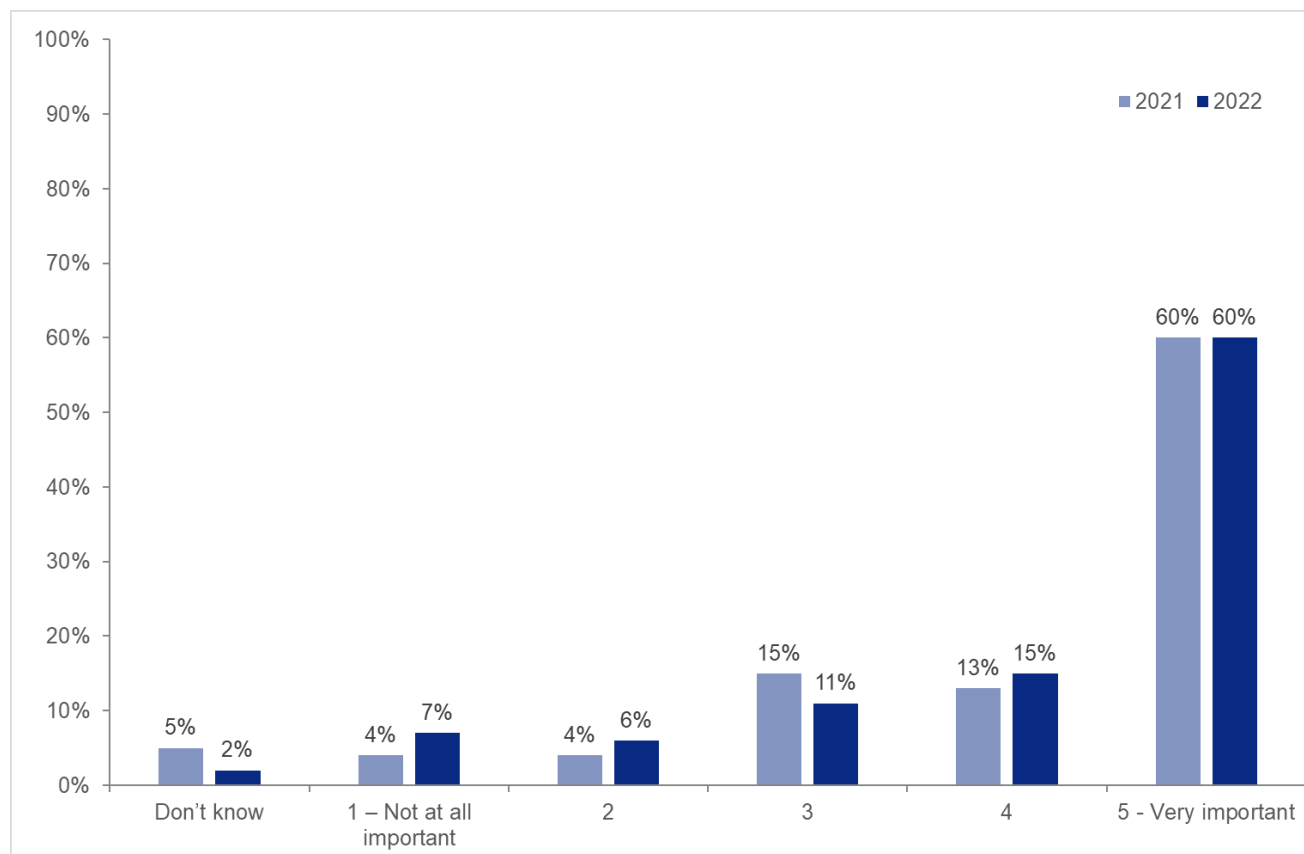
Number of respondents: 515.

Question asked: Does your business currently have access to superfast/full-fibre broadband?

Importance of superfast broadband to business in Bracknell Forest

- 6.6. 75% said superfast broadband is “important” (those rated 4 and 5). This compares similarly with 73% in 2021 and 79% in the 2020.
- 6.7. Businesses that do not have superfast broadband are less likely to say it is important – 58% said it is important compared with 87% of businesses that do have superfast broadband.
- 6.8. Businesses with 20 or more employees were more likely to say it is important - 97% said it is important, compared with 73% of smaller businesses.

Figure 6.3: Importance of superfast broadband to business in Bracknell Forest



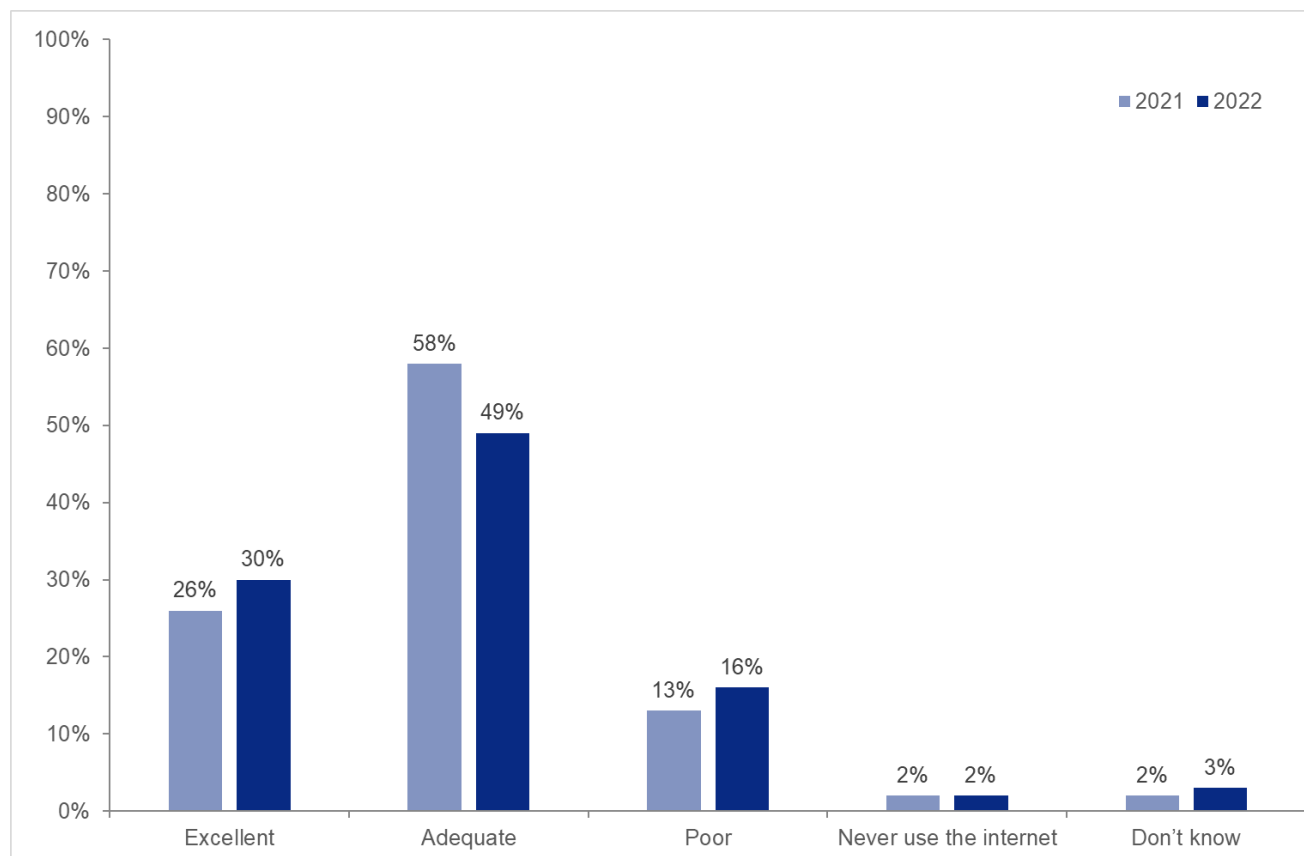
Number of respondents: 512.

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

Rating of internet connection

- 6.9. 30% rate their internet connection as excellent, similar to previous survey results (26% in 2021 and 30% in 2020).
- 6.10. 49% rate it as adequate (58% in 2021 and 59% in 2020), and 16% rate it as poor (13% in 2021).
- 6.11. Businesses without superfast broadband are more likely than others to rate their internet connection as poor – 33% rate it as poor compared with 5% of businesses that have superfast broadband.

Figure 6.4: Rating of business's internet connection



Number of respondents: 514.

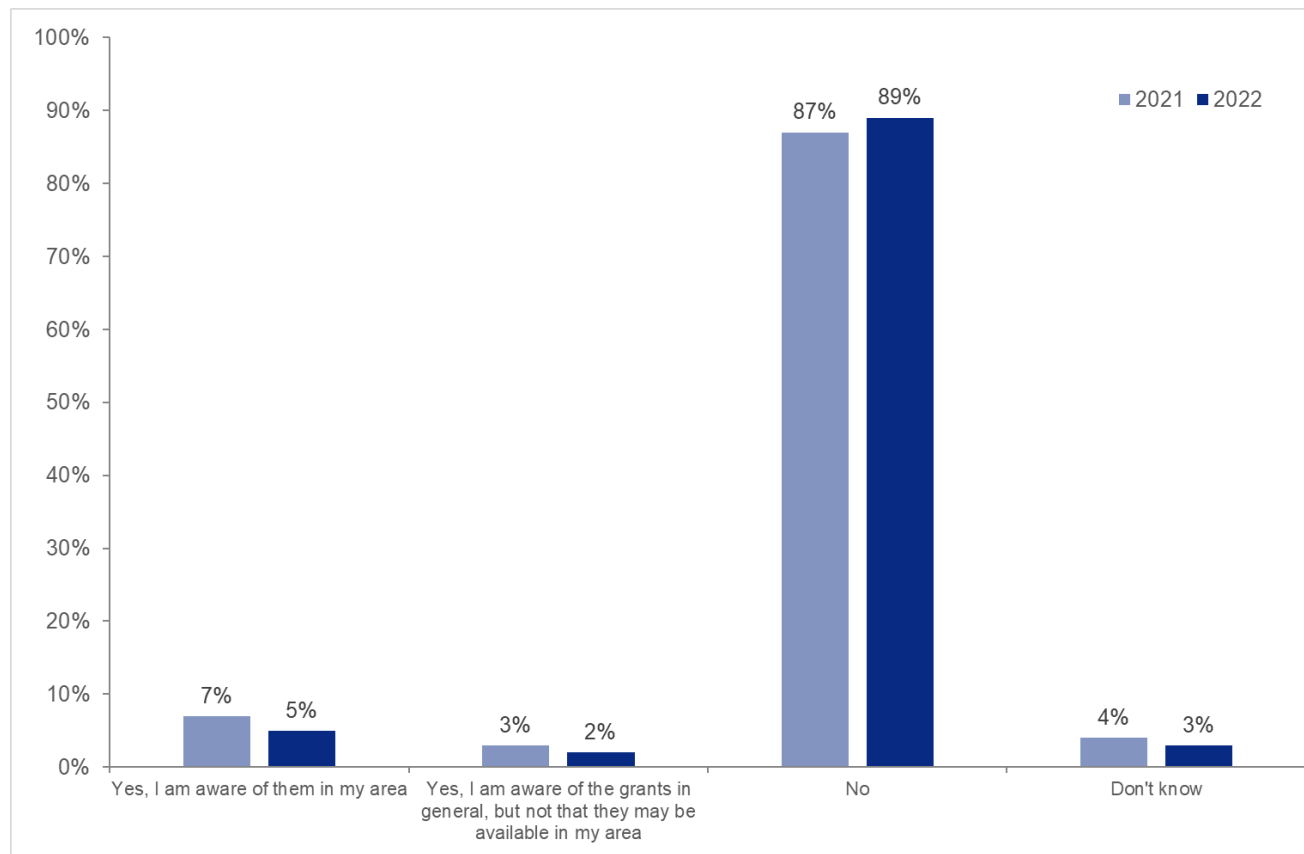
Question asked: How would you rate your business's current internet connection? Would you say it's . . .

Awareness of grants to install superfast broadband

6.12. The majority of businesses (89%) remain unaware of the grants to install superfast/full-fibre broadband (87% in 2021).

6.13. 5% are aware of them in their area and 2% are aware of them in general, but not that they may be available in their area, with overall 7% stating that they are aware of the grants.

Figure 6.5: Awareness of grants to install superfast broadband



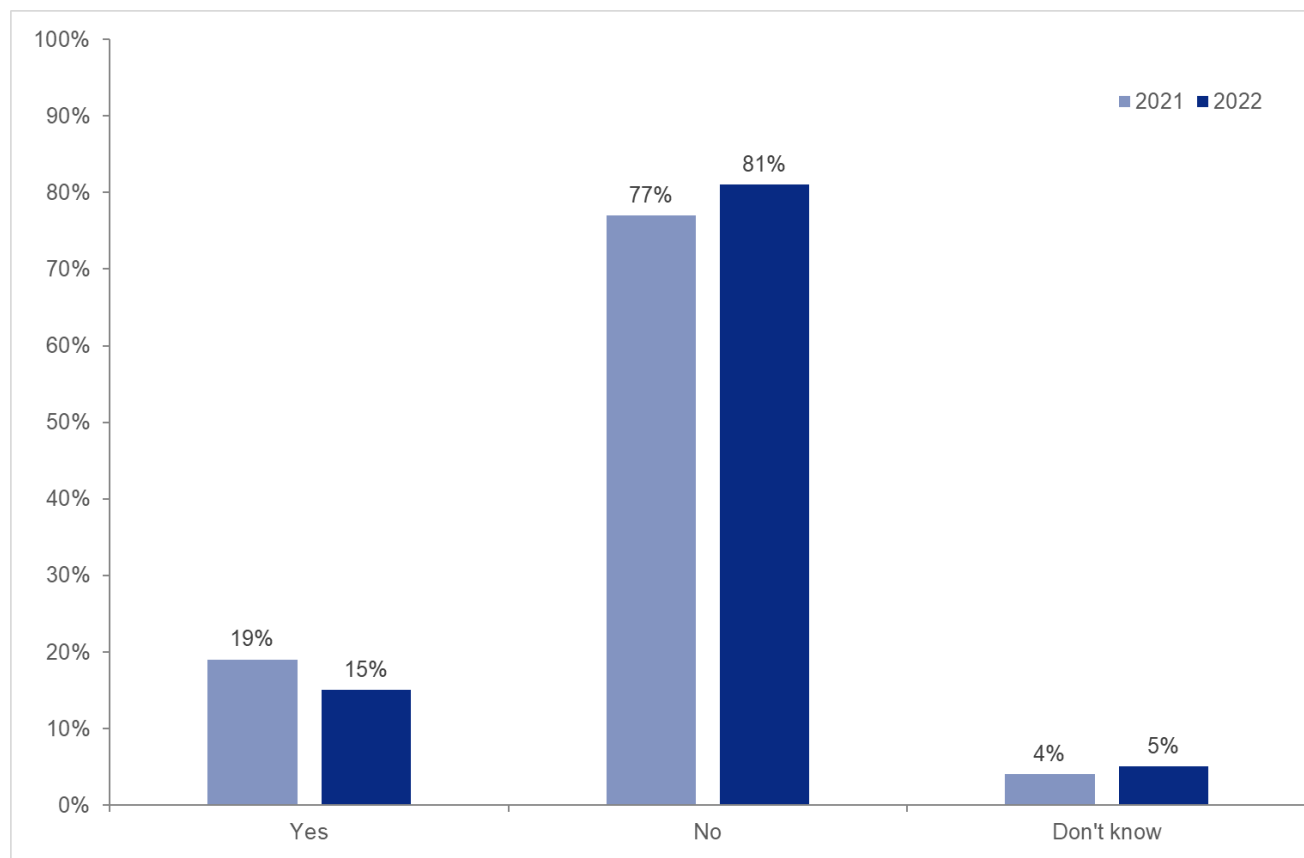
Number of respondents: 509.

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

Awareness of the Building Digital UK Gigabit project

6.14. Similar to 2021, the majority of businesses (81%) are not aware of the Building Digital UK Gigabit project (77% in 2021). 15% are aware of it (19% in 2021).

Figure 6.6: Awareness of the Building Digital UK Gigabit project



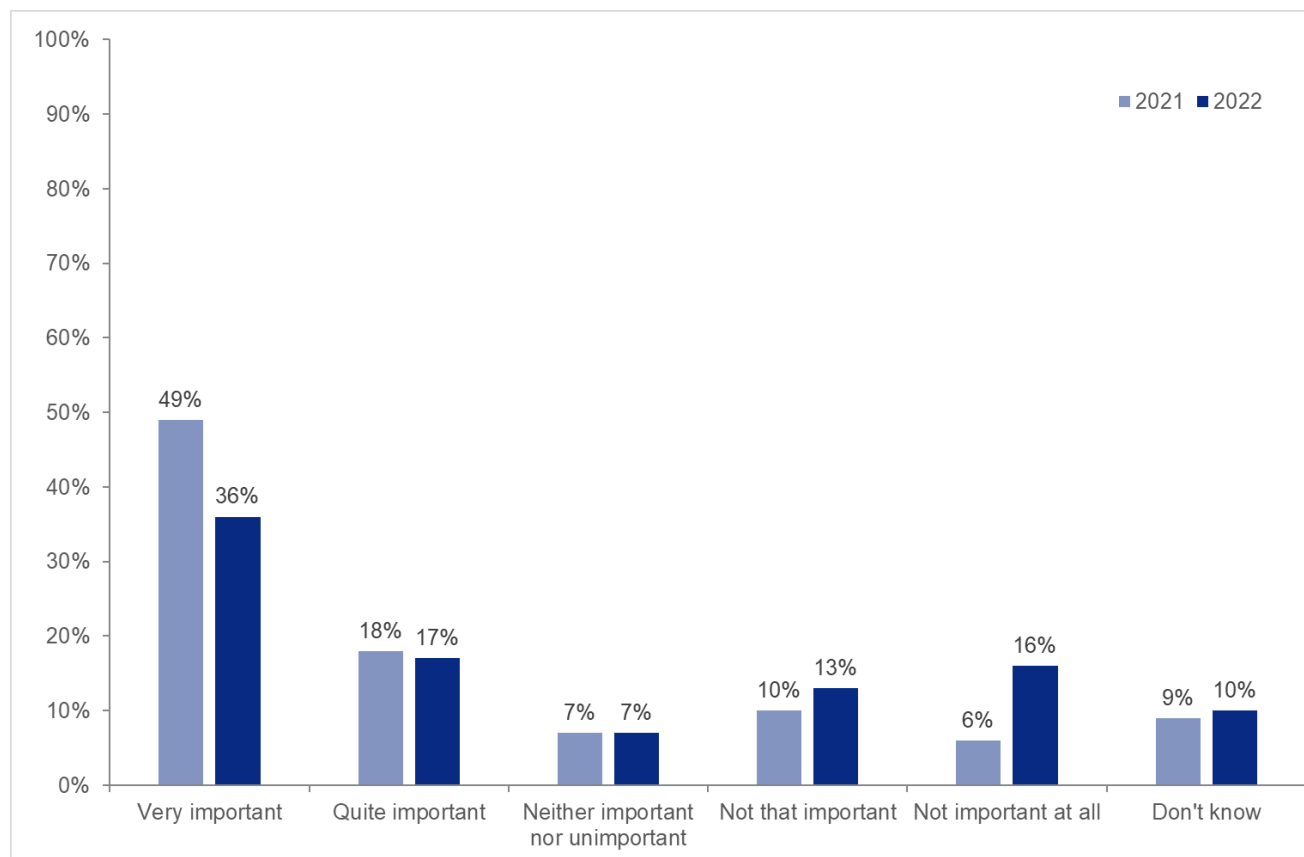
Number of respondents: 506.

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

- 6.15. 53% of businesses said having Gigabit capable broadband is at least quite important to their business, which is a decrease compared with 67% in 2021. 26% said it is not important (compared to 16% in 2021).
- 6.16. Businesses that are aware of the Building Digital UK Gigabit project are more likely to consider having Gigabit capable broadband as important – 69% think it is important compared with 52% of businesses that are not aware.
- 6.17. Larger businesses are more likely to say that having Gigabit capable broadband is at least quite important to their business – 87% of businesses with 20 or more staff said so, compared with 57% of businesses with 5 to 19 staff and 49% of businesses with 0 to 4 staff.

Figure 6.7: Importance of having Gigabit capable broadband to businesses



Number of respondents: 509.

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

Section 7: Awareness of key local business support/improvement organisations

Introduction

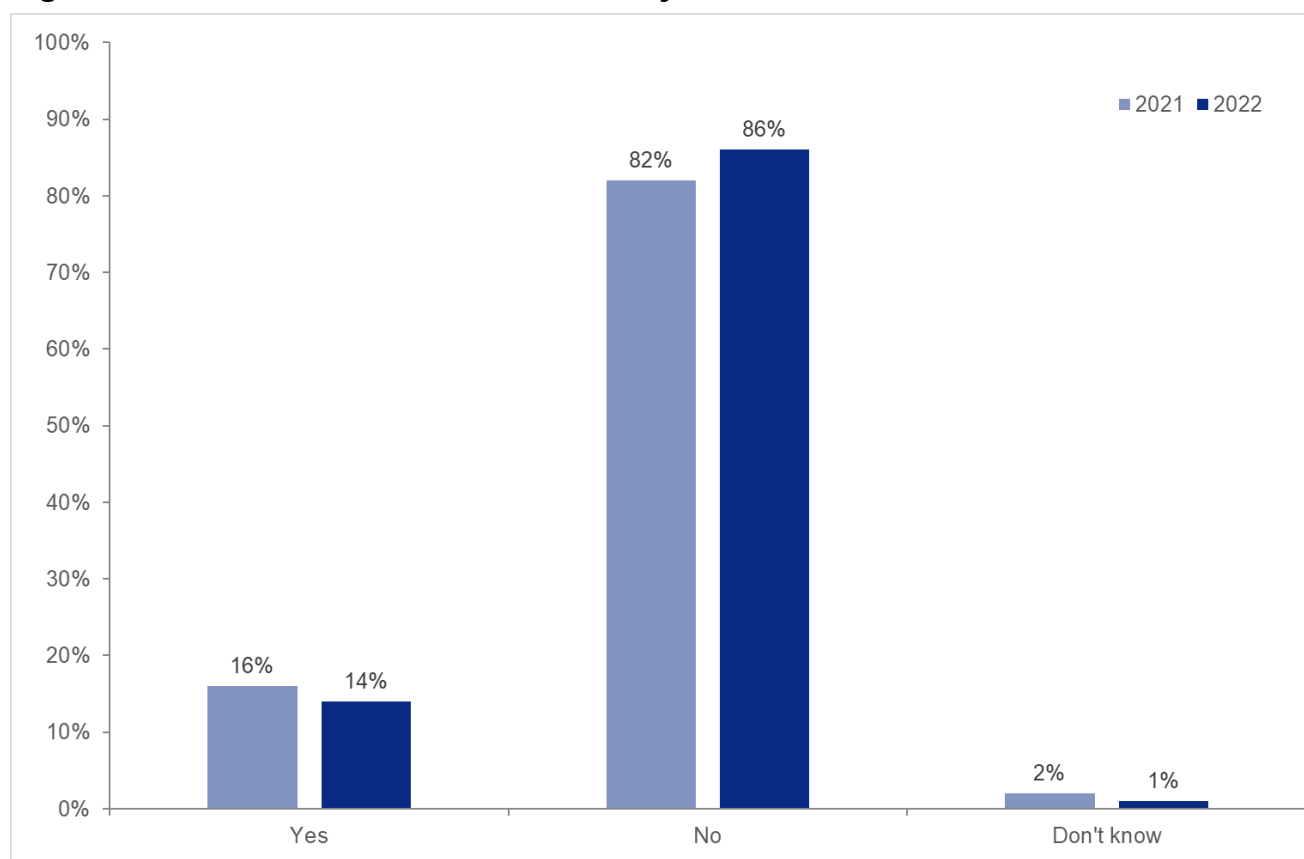
7.1. This section covers businesses' awareness of the Thames Valley Berkshire Local Enterprise Partnership (TVB LEP), Thames Valley Berkshire Growth Hub, and the Bracknell Business Improvement District.

Awareness of the Thames Valley Berkshire LEP

7.2. 14% of businesses are aware of the LEP (16% in 2021 and 25% in 2020), whereas 86% are not aware (82% in 2021 and 72% in 2020).

7.3. Larger businesses are more aware of the LEP – 24% of businesses with 20 or more staff are aware compared with 17% with 5 to 19 staff and 12% with 0 to 4 staff that are aware of the LEP.

Figure 7.1: Awareness of the Thames Valley Berkshire LEP



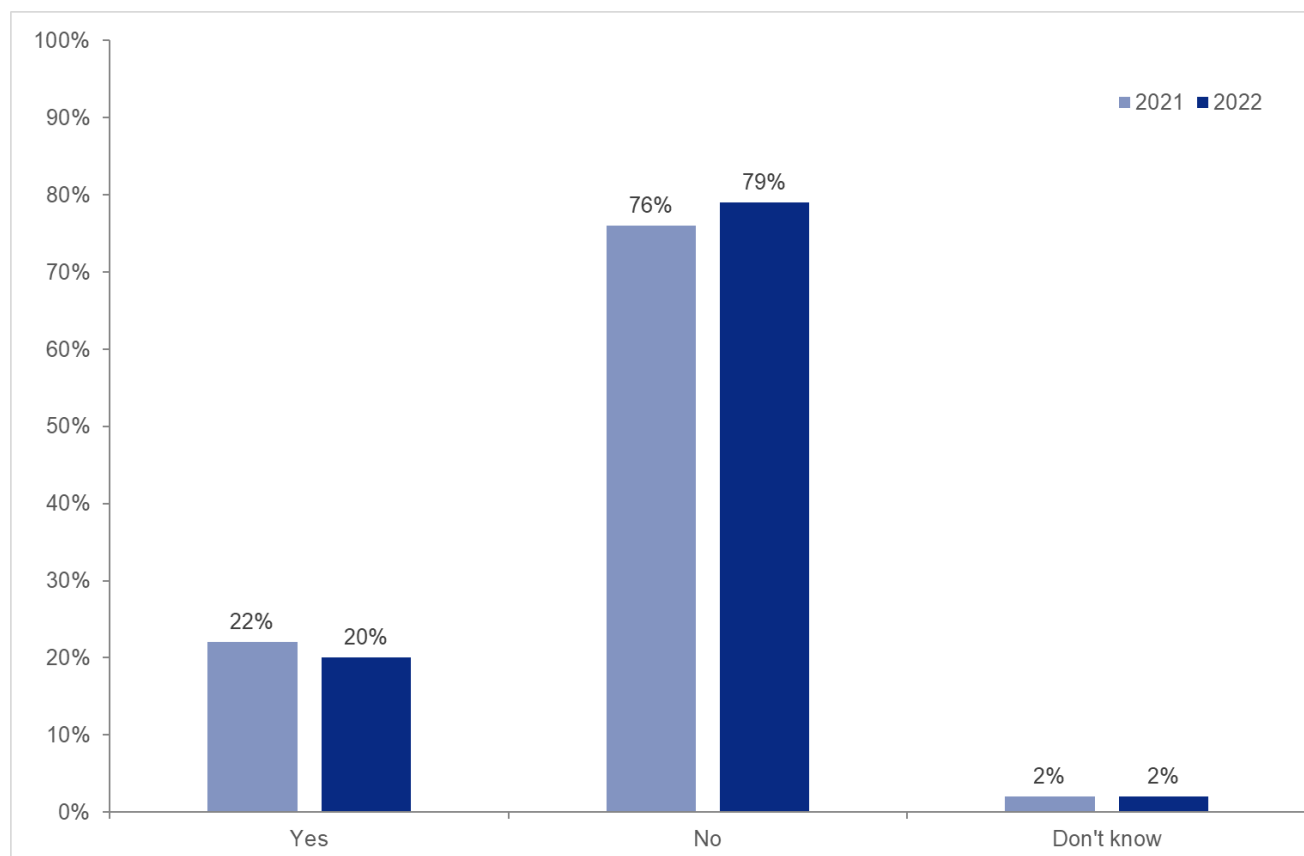
Number of respondents: 515.

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

- 7.4. Similar to 2021, 20% of businesses are aware of the Thames Valley Berkshire Growth Hub (22% in 2021 and 14% in 2020).
- 7.5. Businesses that are aware of the LEP are more likely to be aware of the Growth Hub – 62% are aware of the Growth Hub compared with 13% of businesses that are not aware of the LEP.

Figure 7.2: Awareness of Thames Valley Berkshire LEP Growth Hub



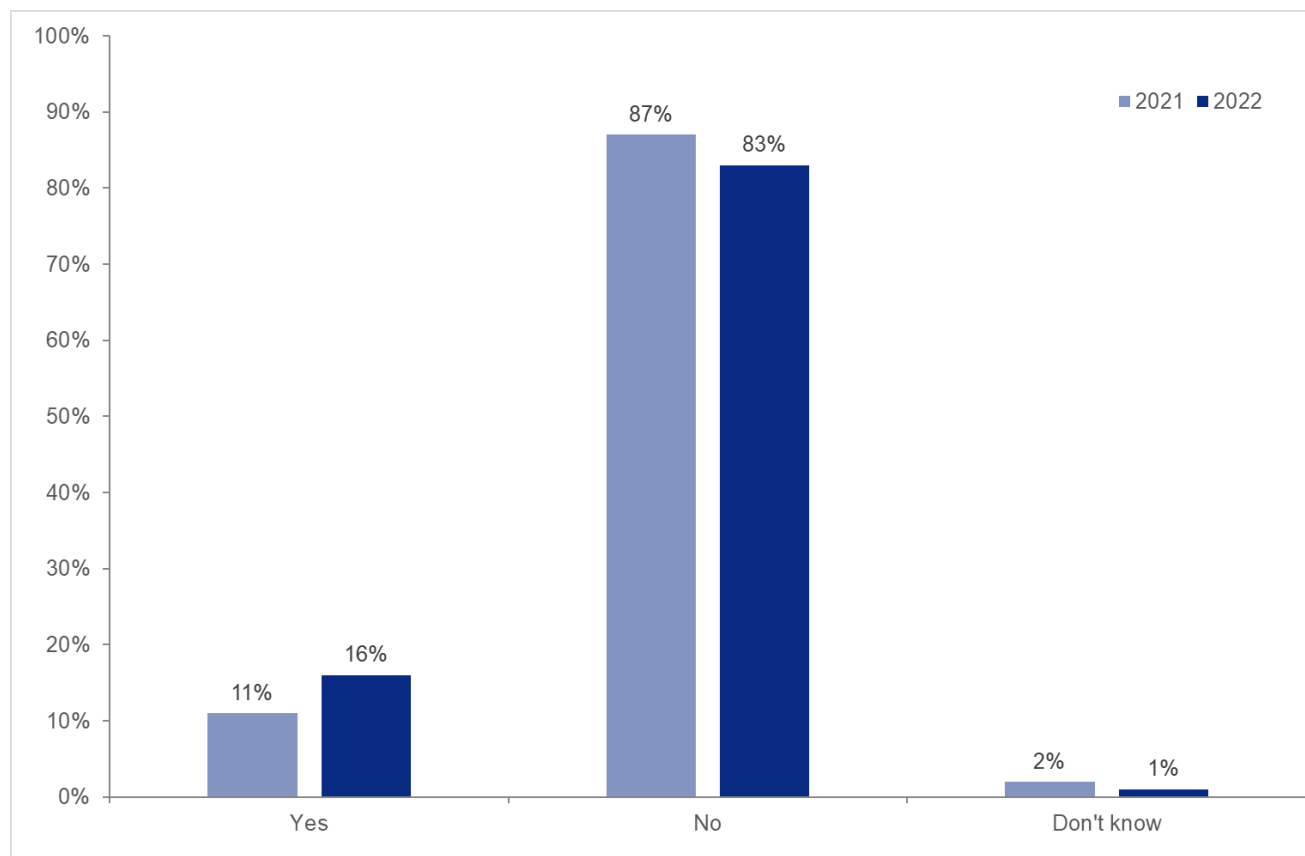
Number of respondents: 513.

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

- 7.6. 16% of businesses are aware of the Bracknell Business Improvement District (11% in 2021).
- 7.7. Businesses within the general BID area are more likely to be aware – 22% are aware compared with 7% of other businesses.
- 7.8. Larger businesses are more likely to be aware – 39% of businesses with 20 or more staff are aware, compared with 25% of businesses with 5 to 19 staff and 13% of businesses with 0 to 4 staff.

Figure 7.3: Awareness of the Bracknell Business Improvement District (BID)



Number of respondents: 515.

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

Section 8: Wellbeing

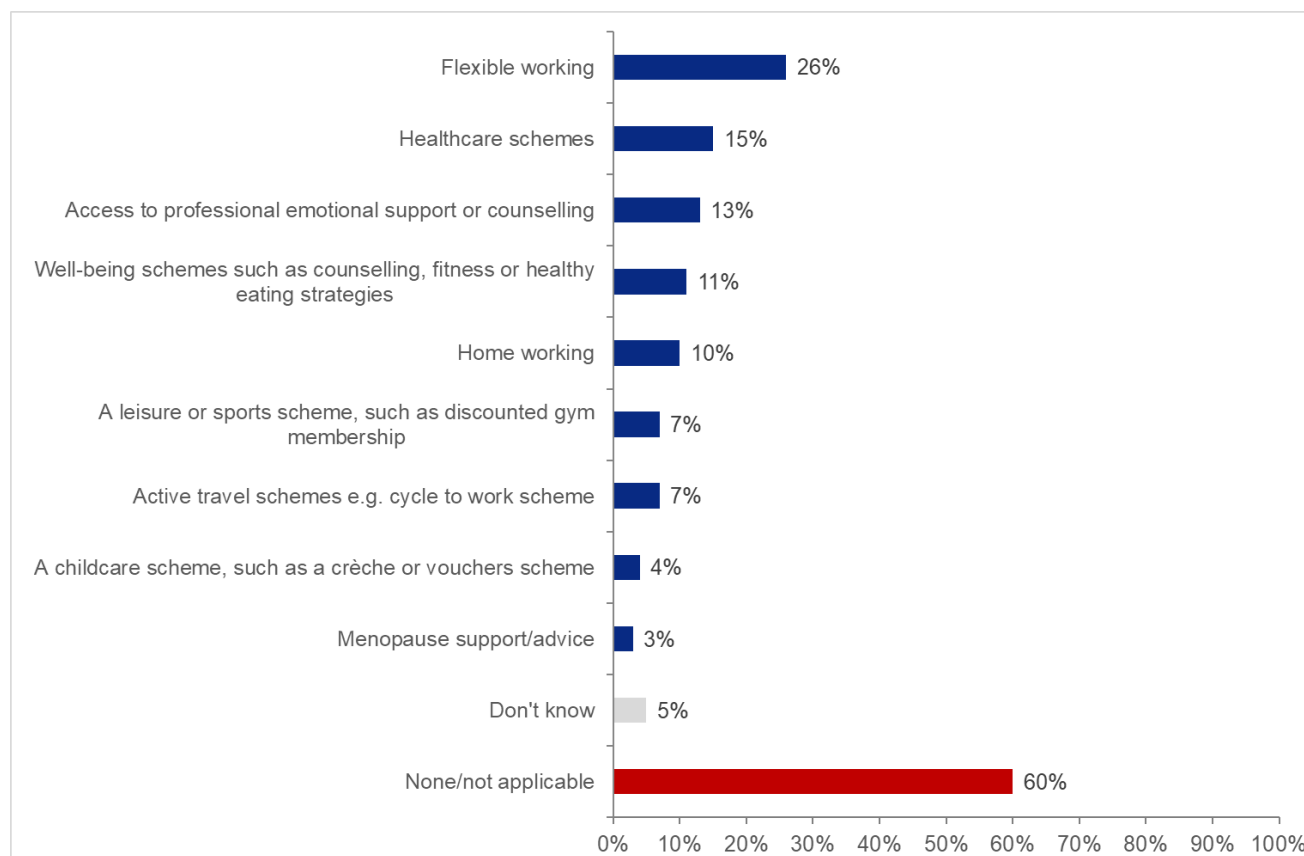
Introduction

8.1. 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

- 8.2. As in 2021, flexible working is the most cited scheme offered to employees (26% in 2022 and 33% in 2021). 15% cited healthcare schemes and 13% access to mental health support and 11% well-being schemes.
- 8.3. 10% cited home-working, which has changed from 17% in 2021 and 33% in 2020 (which is likely due to inflated levels in those years as a result of lockdowns and the pandemic). Similarly, flexible working has decreased from 52% in 2020 and 33% in 2021 to 26% in 2022, likely due to changes in working practices during the height of the pandemic.
- 8.4. Larger businesses are more likely to offer health and well-being schemes to employees – 89% of businesses with 20 or more staff offer such schemes, compared with 53% of businesses with 5 to 19 staff and 34% of businesses with 0 to 4 staff.

Figure 8.1: Health and well-being schemes offered to employees



Number of respondents: 516.

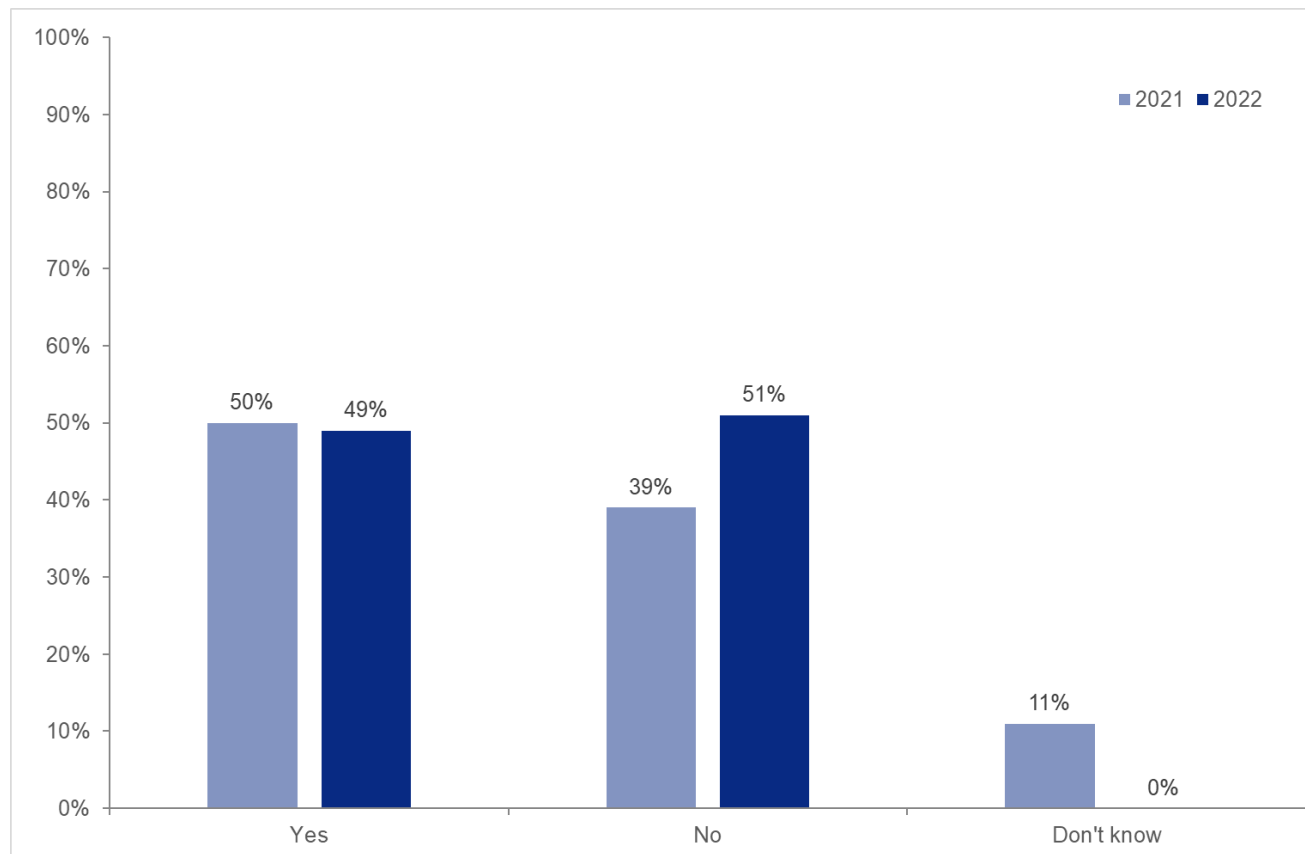
Question asked: Which of the following does your organisation offer to employees?

Note: Respondents could select multiple responses.

Measuring staff wellbeing levels

- 8.5. 49% of businesses said they measure or monitor staff wellbeing levels, similar to 2021.
- 8.6. Larger businesses are more likely to do so – 80% of businesses with 5 or more staff measure or monitor staff wellbeing levels compared with 41% of businesses with 0 to 4 staff.

Figure 8.2: Measuring or monitoring staff wellbeing levels



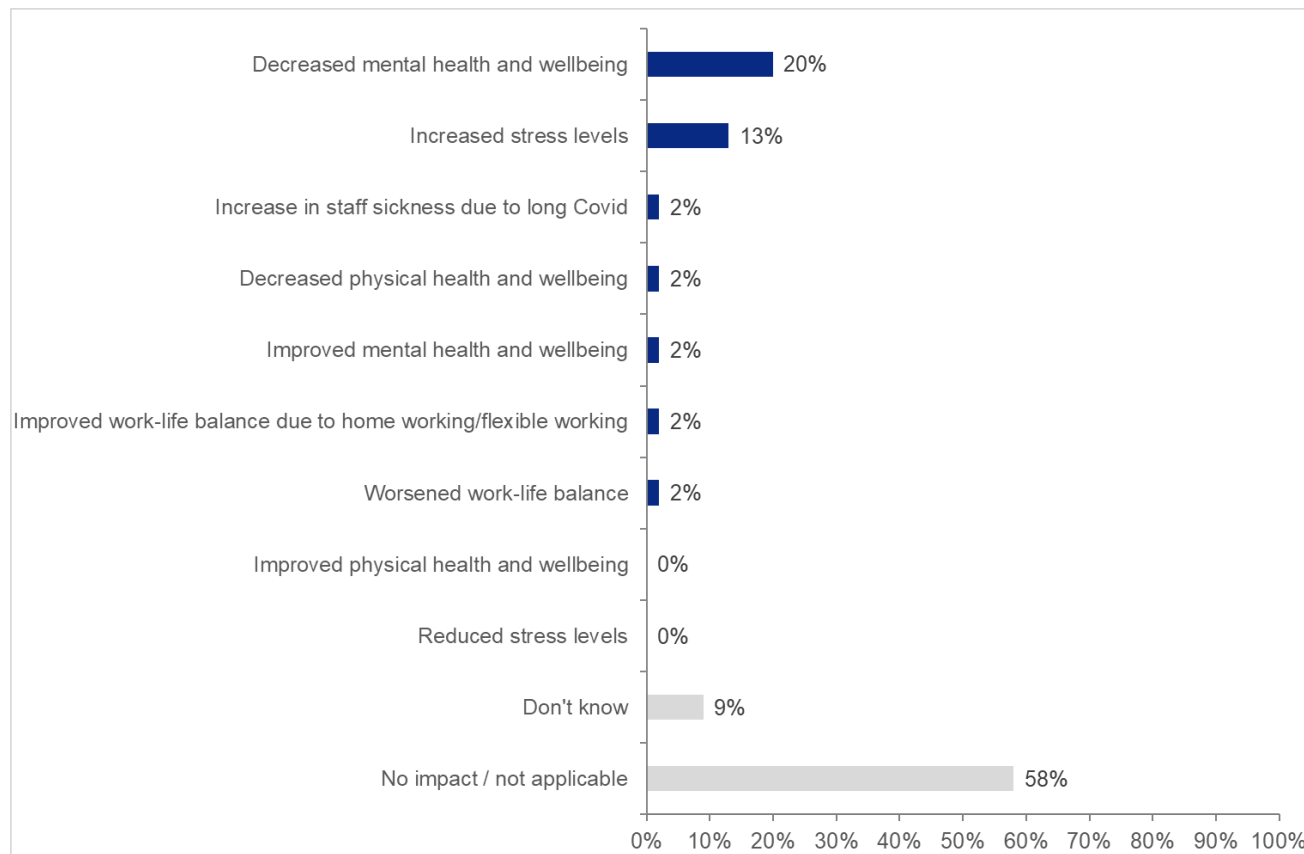
Number of respondents: 512.

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

Impact of Covid-19 on staff wellbeing

- 8.7. 58% said that Covid-19 has not impacted on their staff or is not applicable (likely because they do not have staff). This is similar to 2021 (56%).
- 8.8. 20% said the pandemic decreased mental health and wellbeing (13% in 2021) and 13% mentioned increased stress levels (23% in 2021).

Figure 8.3: Impact of Covid-19 on wellbeing



Number of respondents: 510.

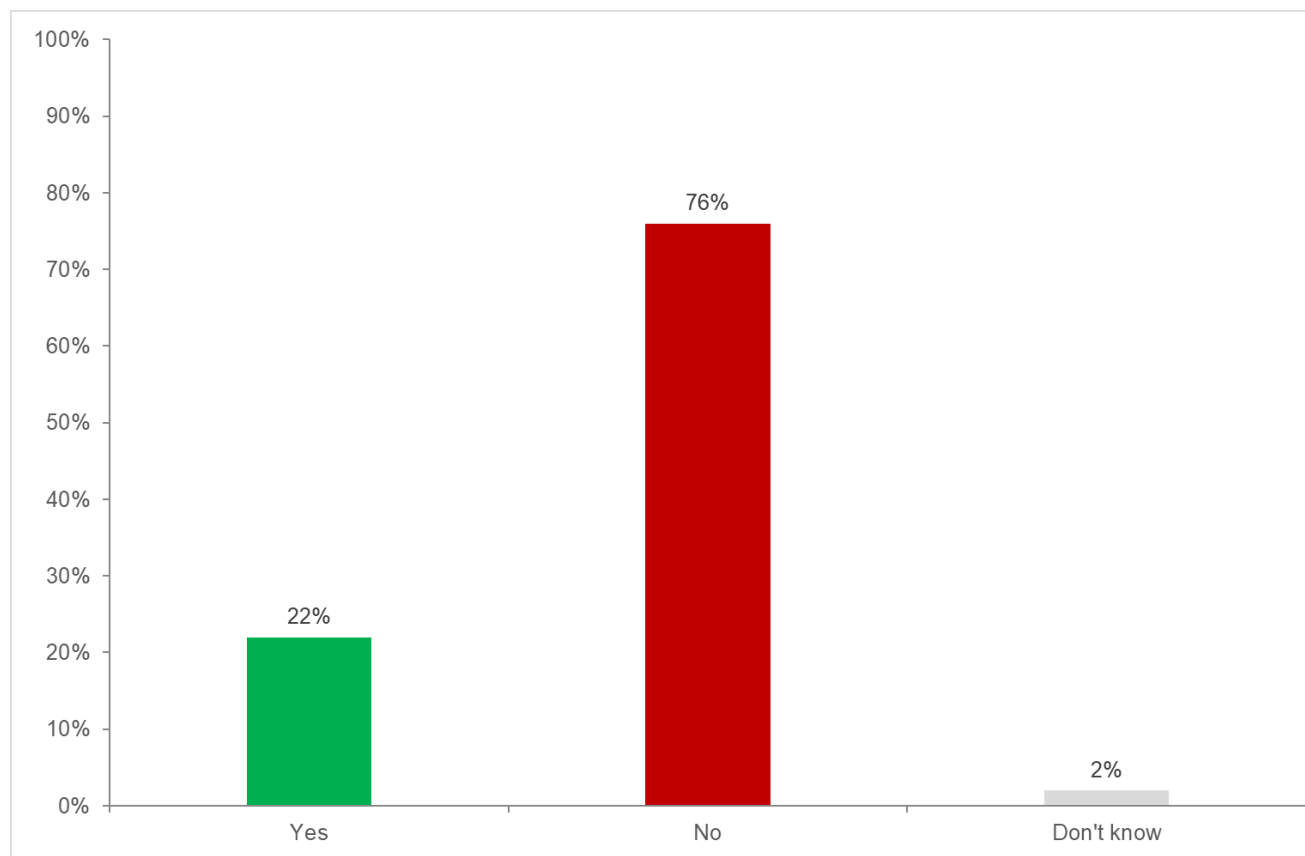
Question asked: In what ways, if any, has the Covid-19 pandemic impacted on staff wellbeing?

Note: Respondents could select multiple responses.

Information on free wellbeing services

- 8.9. 22% of businesses said they provide information to their staff on free wellbeing services available in Bracknell Forest.
- 8.10. Larger businesses are more likely to do so – 50% of businesses with 20 or more staff provide such information to their staff, compared with 39% with 5 to 19 staff and 17% with 0 to 4 staff.
- 8.11. 36% of businesses that said they do not provide such information to their staff, are interested in finding out more, especially larger businesses.

Figure 8.4: Providing information on free wellbeing services



Number of respondents: 510.

Question asked: Do you provide information to your staff on free wellbeing services available in Bracknell Forest?

Section 9: The Green Agenda

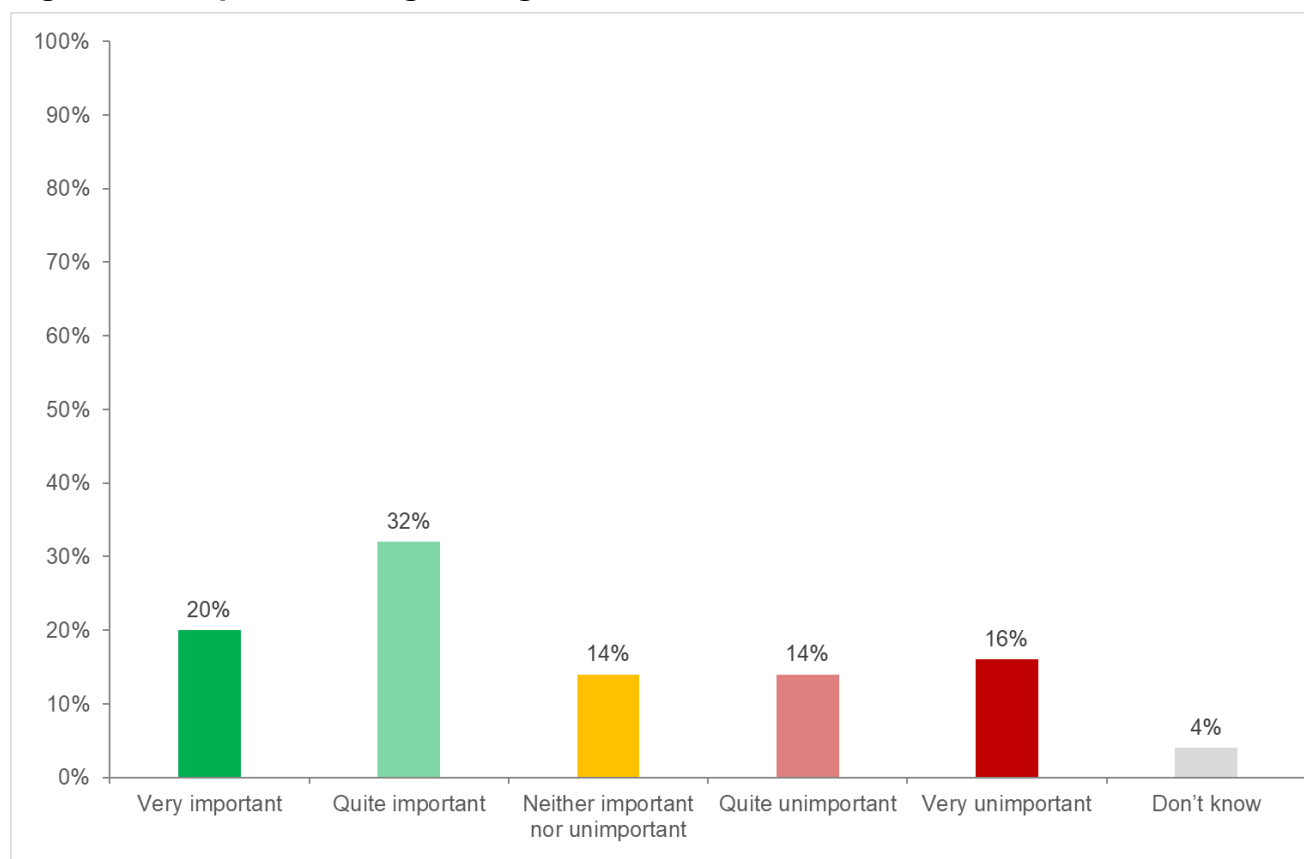
Introduction

9.1. 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, barriers to reducing businesses' carbon footprint and support required to become more sustainable and green-friendly.

Importance of green agenda

- 9.2. 52% of businesses said that climate change and sustainability issues are at least quite important for their business.
- 9.3. Larger businesses are more likely to say it is important – 93% of businesses with 20 or more staff said it is important, compared with 68% of businesses with 5 to 19 staff and 46% of businesses with 0 to 4 staff.

Figure 9.1: Importance of green agenda to business



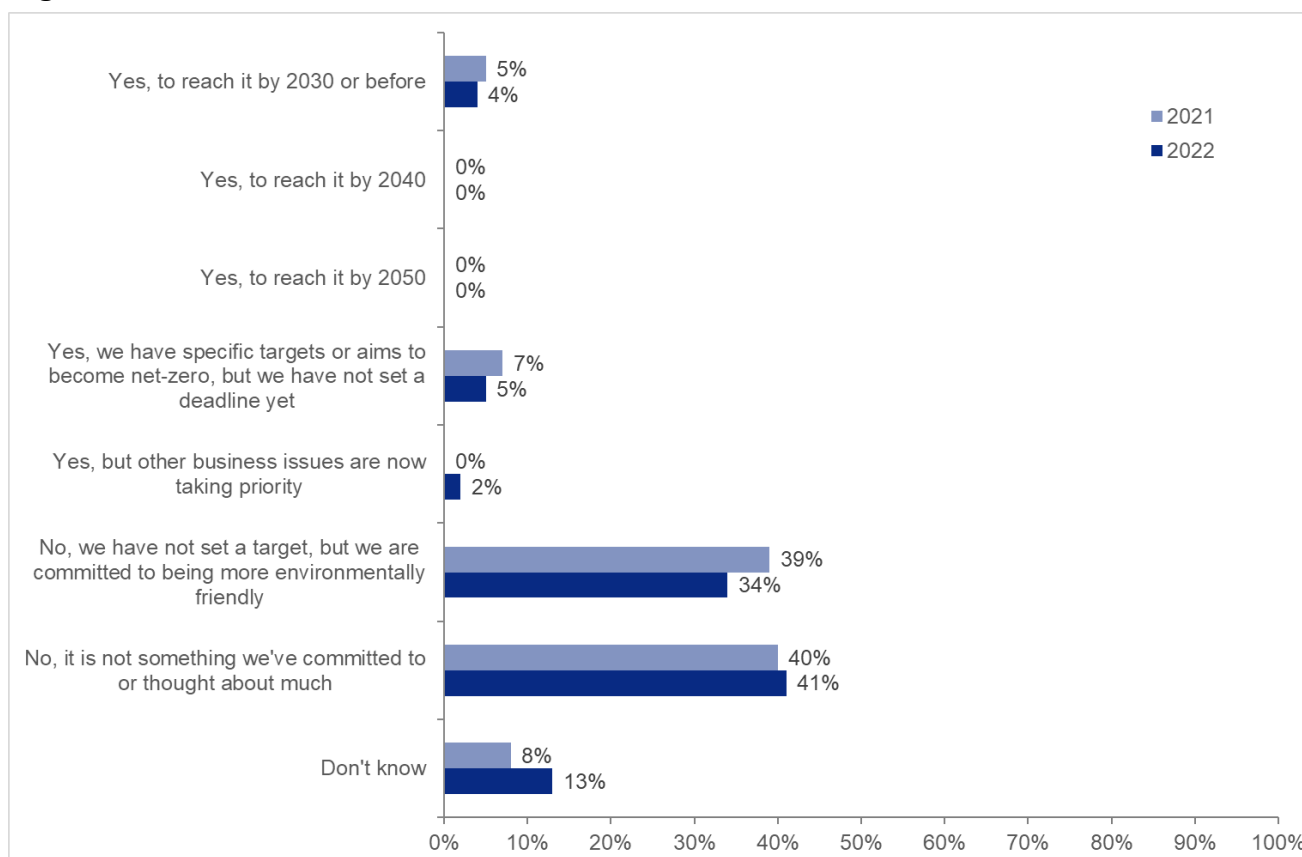
Number of respondents: 514.

Question asked: How important are climate change and sustainability issues for your business?

Commitment to net-zero

- 9.4. Similar with 2021, 4% of businesses are committed to becoming net-zero by 2030 (5% in 2021) and a further 5% have targets but not a deadline (7% in 2021).
- 9.5. Of those that have set targets, 37% are currently implementing carbon reduction measures, 6% in the next 12 months, 8% in the next 24 months and 10% in the next 36 months. 27% said they will implement at a later date and 12% did not know when they would implement measures.
- 9.6. 41% of businesses said becoming net-zero is not something they are committed to or given much thought (40% in 2021).
- 9.7. Larger businesses are more likely to have some sort of commitment towards net zero – 19% of businesses with 20 or more staff said they are committed to becoming net-zero by 2030, compared with 7% of businesses with 5 to 19 staff and 3% with 0 to 4 staff.

Figure 9.2: Commitment to become net-zero



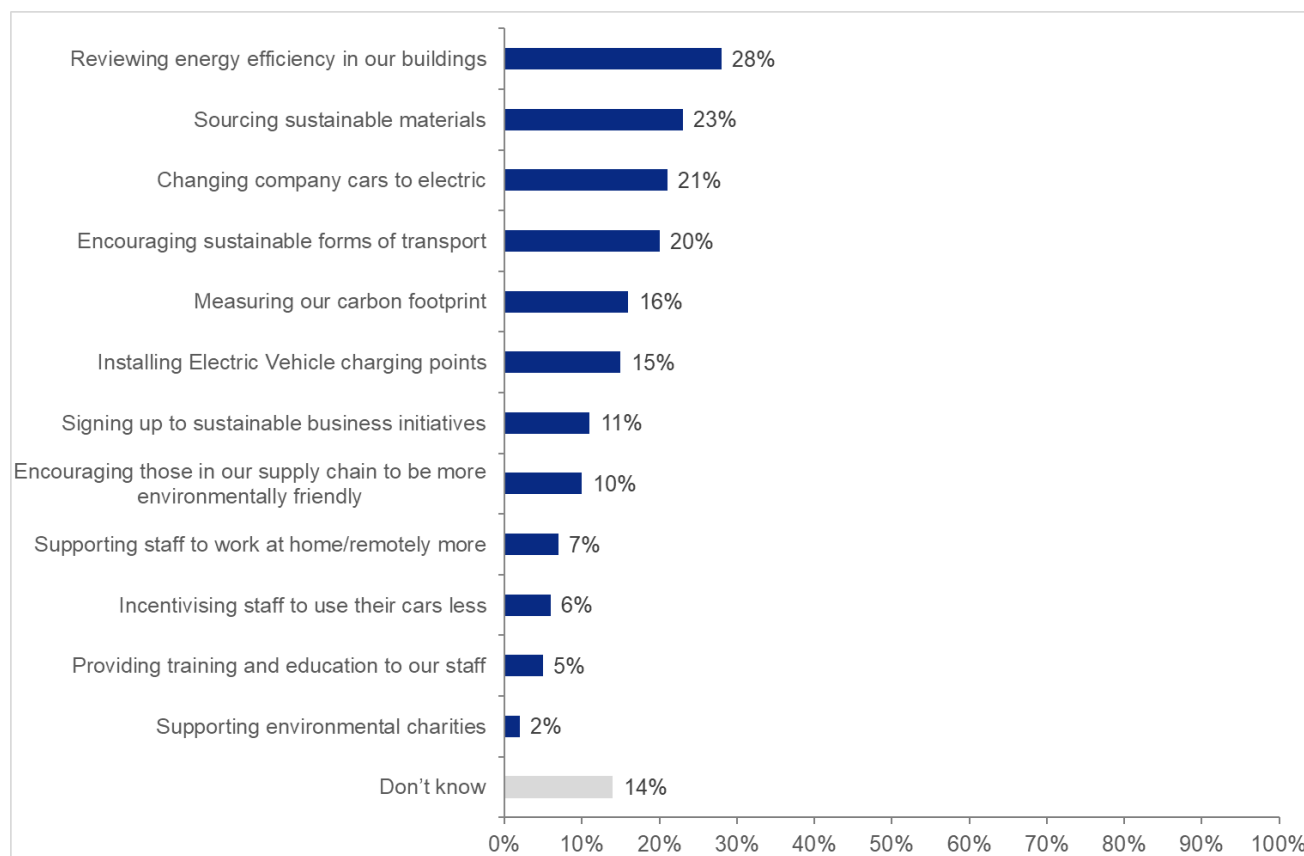
Number of respondents: 512.

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

Actions towards becoming net-zero

- 9.8. Businesses who had actively committed to net-zero were asked what actions they were taking to achieve this. Businesses are taking a variety of actions, most notably reviewing energy efficiency of buildings (28%), sourcing sustainable materials (23%), changing company cars to electric (21%), encouraging sustainable forms of transport (20%) and relatedly installing electric vehicle charging points (15%). 16% are measuring their carbon footprint.
- 9.9. In addition, in 'other' comments about 4-5% of respondents spontaneously mentioned increasing recycling and a similar proportion mentioned using renewable sources of energy.

Figure 9.3: Actions towards becoming net-zero



Number of respondents: 68 (only asked to those actively committed).

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

Note: Respondents could select multiple responses.

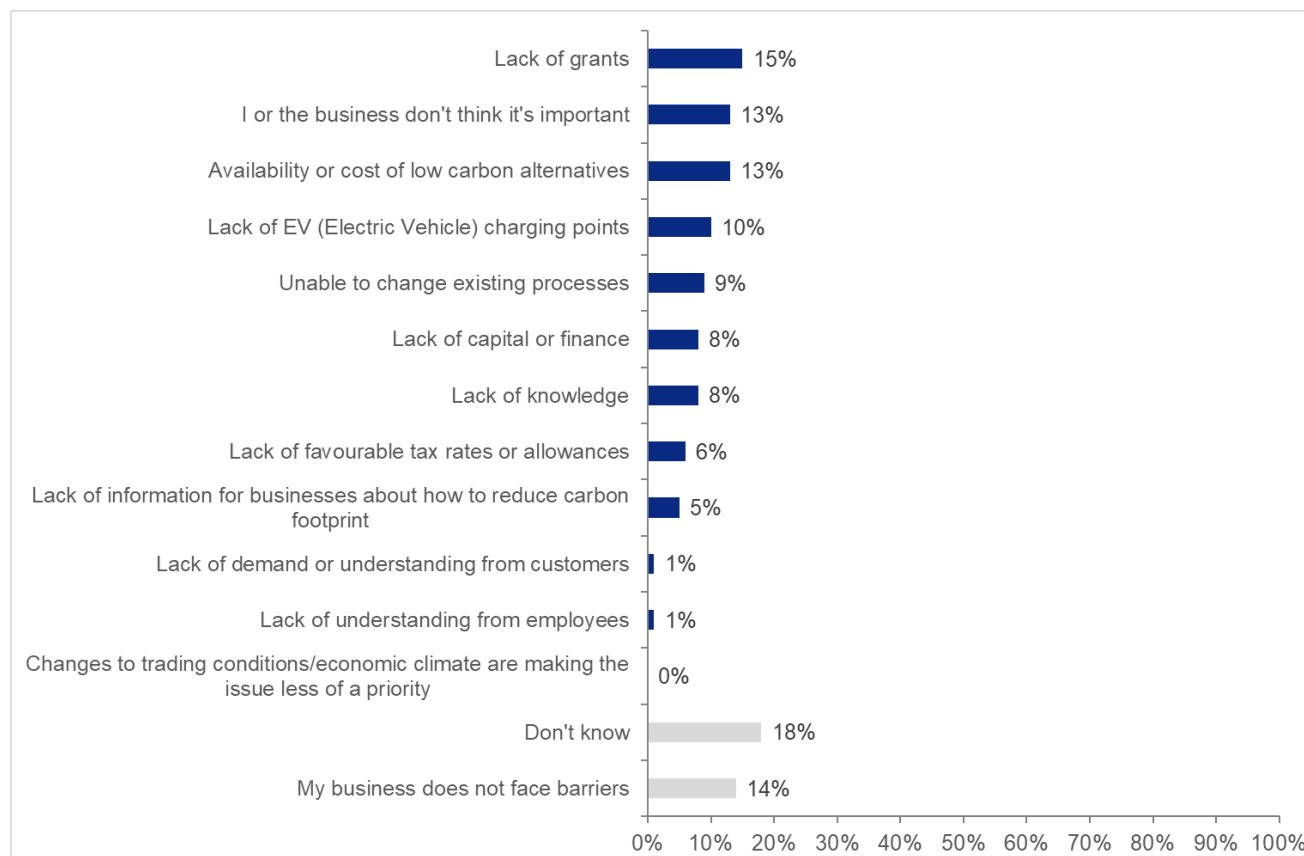
Barriers to reducing carbon footprint

9.10. The most commonly cited barrier businesses gave to reducing the carbon footprint of their business was the lack of grants (15%), followed by not thinking the agenda is important (13%), availability of low-carbon alternatives (13%), lack of electric vehicle charging points (10%), being unable to change existing processes (9%), lack of capital/finance (8%) and lack of knowledge (8%).

9.11. 18% said they 'don't know', perhaps reflecting a lack of engagement with, and knowledge of, the subject matter.

9.12. 14% said that their business does not face barriers.

Figure 9.4: Barriers to reducing businesses' carbon footprint



Number of respondents: 496.

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

Note: Respondents could select multiple responses.

9.13. In response to the above barriers, businesses were asked what support they would like to help reduce their business's carbon footprint. The following were most commonly mentioned:

- Information and advice, as well as hands-on support, to help design and implement changes: cited by approximately 15% of respondents.
- Grants to facilitate changes and remove financial barriers: c10% of respondents.
- Incentives to make changes, such as tax breaks or other financial or commercial advantages: c10% of respondents.
- Improved infrastructure, especially electric vehicle charging points and improved public

transport and cycling routes: c10% of respondents.

- Increased opportunities to recycle, becoming more digital and reducing paper-use: c5% of respondents.

- 9.14. In addition, about 20% of respondents said they do not need help because it is not a priority for them, especially in the current economic conditions. Similarly, about 10% of respondents said they do not need help because they are already doing as much as they can (or already have external help or internal expertise).
- 9.15. About a third of respondents did not provide an answer to this question, perhaps indicating a lack of engagement or interest in the subject matter and that they do not know what support or help they require.

Bracknell Forest Business Survey 2022

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: Economic conditions

Note to interviewer: Read out - This next set of questions asks about your experience, and the impact on your business, of the current economic situation including the rising cost of energy, cost of living and the post-pandemic recovery.

- Q4. Compared to pre-Covid-19 pandemic levels, would you say that your businesses' turnover is higher, lower or about the same?** Note to interviewer: Read out and select one answer only.
- ☐ Substantially higher
 - ☐ Slightly higher
 - ☐ Slightly lower
 - ☐ Substantially lower
 - ☐ No change/about the same
 - ☐ Unsure/don't know
- Q5. Compared to pre-pandemic levels, over the past 12 months, has the proportion of your workforce working from home/remotely decreased, stayed the same or increased?** Note to interviewer: Select one answer only.
- ☐ Decreased
 - ☐ Stayed the same
 - ☐ Increased
- 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. Has your business been encouraging employees who have been working from home to return to the workplace?** Note to interviewer: Read out response options and select one answer only.
- ☐ Yes, all of them
 - ☐ Yes, some of them
 - ☐ Not yet, but intend to
 - ☐ No
 - ☐ N/A do not have many staff working from home
 - ☐ Don't know
- Q9. Over the past 12 months, has your business performance improved, remained stable or decreased?** Note to interviewer: Select one answer only.
- ☐ Improved
 - ☐ Remained stable
 - ☐ Decreased
- Q10. 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

Q11. What, if anything, has been the impact of the increase in energy prices on your business?

Note to interviewer: Ask unprompted and select all relevant answers.

- ☐ Increased cost of conducting business
- ☐ Increased energy bills
- ☐ Increased price of raw materials
- ☐ Increased prices of support services
- ☐ Increased cost of labour
- ☐ No impact
- ☐ Don't know
- ☐ Other

If 'other', please specify:

Q12. If impact, how have you mitigated against the impact of energy prices on your business?

Note to interviewer: Ask unprompted and select all relevant answers.

- ☐ Sought efficiency savings
- ☐ Sought to manage use of energy
- ☐ Sought new energy suppliers
- ☐ Sought other new suppliers of raw materials
- ☐ Sought other new suppliers of support services
- ☐ Reduced amount of energy and fuel used
- ☐ Reduced labour costs
- ☐ Increased prices of goods and services
- ☐ No changes or mitigation made
- ☐ Don't know
- ☐ Other

If 'other', please specify:

Q13. What, if anything, has been the impact of the current cost of living crisis on your business?

Note to interviewer: Ask unprompted and select all relevant answers.

- ☐ Less customers
- ☐ Increased wage pressure due to inflation
- ☐ Increased demand
- ☐ No impact
- ☐ Don't know
- ☐ Other

If 'other', please specify:

Q14. What are the main economic issues that are affecting your business's performance and growth? Note to interviewer: Ask unprompted and select all relevant answers.

- ☐ Covid-19/post-pandemic recovery
- ☐ Brexit
- ☐ Energy prices
- ☐ Cost of living crisis
- ☐ Other
- ☐ No issues affecting business
- ☐ Don't know

If 'other', please specify:

Q15. What, if anything, would help your business and the local economy deal with the current economic challenges? 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
- ☐ 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

Q16. Overall, has the long-term impact on your business of the UK leaving the European been positive, negative or neither? Note to interviewer: Select one answer only.

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

Q17. What have been the main negative long-term or sustained impacts, if any, that 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:

Q18 What have been the positive long-term impacts, if any, on your business of the UK leaving the EU? Please list below:

Section 4: Recruitment, Skills and Retention

Q19. Ask all: Have you had any vacancies in the last 12 months? Select one answer only.

- ☐ Yes
- ☐ No

Q20. Ask those that said 'Yes' to previous question: Have you had any vacancies in the last 12 months that you have found hard to fill? Select one answer only.

- ☐ Yes
- ☐ No

Q21. Ask all: 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

Q22. Ask those that have recruited: 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
- ☐ High wage expectations
- ☐ Our poor recruitment strategy
- ☐ Not enough or unsociable hours
- ☐ Low wages or high living costs
- ☐ The economy/current economic conditions
- ☐ 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:

Q23. 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

Q24. 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
- ☐ Due to the job requirements
- ☐ Costs of training and up skilling
- ☐ No time to be able to up skill staff
- ☐ Difficulties retaining staff due to economic conditions
- ☐ 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:

Q25. 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

Q26. 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

Q27. Would your business benefit from a Bracknell-based training and development service, such as a Skills and Training Hub, that liaises with businesses and training providers to help make it easier to access appropriate training and development opportunities?? Note to interviewer: Select one answer only.

- ☐ Yes
- ☐ No
- ☐ Don't know

Q28. Ask all: 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

Q29. 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
- ☐ Menopause support/advice
- ☐ None
- ☐ Don't know
- ☐ Not applicable

Q30. 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

Q31. 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
- ☐ Increase in staff sickness due to long Covid
- ☐ Other
- ☐ No impact
- ☐ Don't know
- ☐ Not applicable

If 'other', please specify:

Q32. Do you provide information to your staff on free wellbeing services available in Bracknell Forest? Note to interviewer: Select one answer only.

- ☐ Yes
- ☐ No
- ☐ Don't know

Q33. If No or don't know, would you like to receive information on this services? Note to interviewer: Select one answer only.

- ☐ Yes
- ☐ No
- ☐ Don't know

Section 7: Infrastructure

Q34. 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:

Q35. 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

Q36. If said 'Increase' to previous question: In what ways?

Q37. If said 'Decrease' to previous question: In what ways?

Q38. 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bus services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The major road network	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The local road network	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Broadband	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing (including social/low cost housing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Greenspace/Open space accessible to employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catering/Restaurant facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cycle and walking routes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business premises (small/medium/large)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electric Charging Points	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q39. 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:

Q40. 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

Q41. Bracknell Forest Council is involved with a programme to improve broadband throughout Berkshire called Superfast Berkshire, which aims to ensure that 99% of Bracknell Forest have access to full-fibre broadband. Where you aware of this? Select one answer only.

- ☐ Yes
- ☐ No
- ☐ Don't know

Q42. Does your business currently have access to superfast/full-fibre broadband? Select one answer only.

- ☐ Yes
- ☐ No
- ☐ Don't know

Q43. How important is having superfast/full-fibre 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

- Q44. 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
- Q45. Are you aware of grants to install superfast/full-fibre 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
- Q46. 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
- Q47. 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

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

- Q48. 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
- Q49. 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
- Q50. 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

Q51. How important are climate change and sustainability issues for your business? Note to interviewer: Read out response options and select one answer only.

- ☐ Very important
- ☐ Quite important
- ☐ Neither important nor unimportant
- ☐ Quite unimportant
- ☐ Very unimportant
- ☐ Don't know

Q52. 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
- ☐ Yes, but other business issues are now taking priority
- ☐ 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

Q53. If yes, are you planning to implement carbon reduction measures in the next 12, 24 or 36 months? Note to interviewer: Ask unprompted, but clarify if required. Select one answer only.

- ☐ Yes, currently implementing
- ☐ Plan to implement within the next 12 months
- ☐ Plan to implement within the next 24 months
- ☐ Plan to implement within the next 36 months
- ☐ We will implement at a later date
- ☐ Don't know

Q54. 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:

Q55. 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
- ☐ Lack of information for businesses about how to reduce carbon footprint
- ☐ Changes to trading conditions/economic climate are making the issue less of a priority
- ☐ My business does not face barriers
- ☐ I or the business don't think it's important
- ☐ Don't know
- ☐ Other

If 'Other', please specify:

Q56 What support, if any, would your organisation like to help you to reduce your business's carbon footprint?

Q57 Thank you for taking part in this survey, if you would like to receive relevant information from Bracknell Forest Council, please may we have your permission to share you email address with Bracknell Forest Council? Note to interviewer: If yes, please record below:

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