

SEMLEP Business Survey 2017: Central Bedfordshire Council

Report: September 2017

SEMLEP

South East Midlands
Local Enterprise Partnership

**Central
Bedfordshire**



Research
Evaluation
Community Engagement
Strategy Development

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SEMLEP Business Survey 2017: Central Bedfordshire Council

Executive Summary

Introduction and background

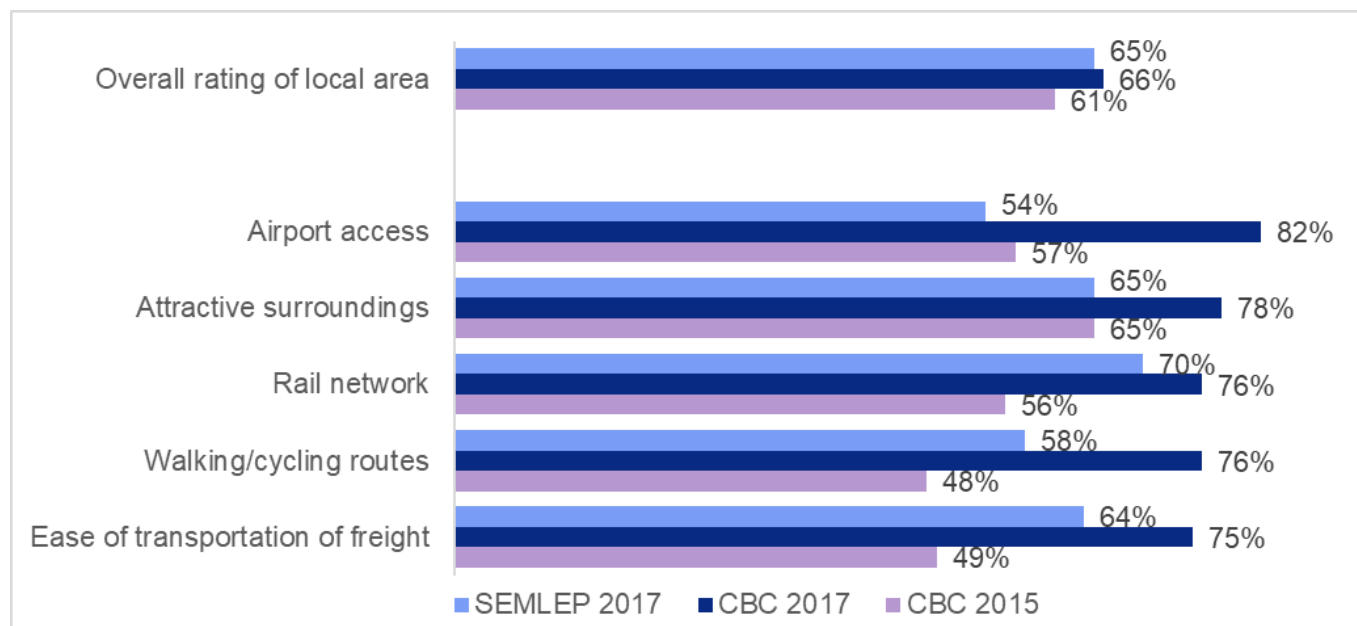
1. The South East Midlands Local Enterprise Partnership (SEMLEP) is one of 38 LEPs in England tasked with determining local economic priorities and undertaking activities aimed at driving economic growth and increasing jobs, via a business-led partnership. SEMLEP covers an area made up of 14 local authorities, of which Central Bedfordshire is one.
2. This report presents findings from the 2017 SEMLEP business survey for Central Bedfordshire Council. It covers the following issues:
 - Quality of the local area as a business location
 - Business engagement and support
 - Business performance
 - Employment, skills and training
 - Innovation
 - Regulation
 - Perceptions about SEMLEP
3. The survey's overarching aim was to identify the economic challenges and opportunities facing businesses in the area, to inform SEMLEP and local authority approaches to the development and delivery of their economic development activities. This report provides analysis to support and inform these activities, and shows comparisons to SEMLEP overall and over time, as well as by other variables such as businesses, to help provide a local picture of business need.
4. A total of 2,374 interviews (252 of which were in Central Bedfordshire) were carried out via telephone over a six-week period between mid-June to the start of August 2017, with a sample of businesses that was representative of the business population in the area.

Key findings

Quality of the local area for business

5. Overall, two-thirds of businesses (66%) rated their local area as a good area to do business, giving it a score of 4 or 5 out of 5. This is broadly consistent when compared over time and against the SEMLEP average.
6. Ratings on specific aspects were generally higher than seen across SEMLEP, and there have been several notable improvements since 2015. The area has seen large improvements in the ratings of aspects of the infrastructure. Infrastructure dominates the top 5 rated aspects of the area, which may reflect the substantial investment Central Bedfordshire has undertaken in the road and public transport network over recent years.

Figure 1: Top 5 rated aspects of the local area over time (% giving a 4 or 5 out of 5)



Number of respondents: SEMLEP 2374, CBC 2017 252, CBC 2015 255. Figures exclude don't know answers.

Questions asked: Overall, how do you rate your location as a place to do business? How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

7. The lowest rated aspects were the local town centre (27% gave a positive rating), the local support available to businesses (41%), the availability of affordable housing (45%), locally available workforce (48%) and the average pay scales/wage levels for the area (53%).
8. Overall, 10% of businesses were thinking of relocating. Of these, half were looking to relocate within Central Bedfordshire (5%), and the remaining 5% were looking to relocate outside of the SEMLEP area. The most common reason for considering relocation was to move to larger premises.

Business engagement

9. Businesses were more likely to disagree (32%) than agree (21%) that the Council provides value for money. This was slightly more negative than the figures seen in 2015.
10. Nearly all businesses (99%) had used some form of business advice or support in the past 12 months. This was most commonly advice from an accountant (63%), Central Government department or government body (such as HMRC, Jobcentre Plus) (50%) or a solicitor (26%).
11. Use of local initiatives was fairly low; 9% have contacted the Council, 2% had used the Velocity Growth hub, 2% the business timebank service and none of the businesses in the survey had used My Incubator Ventures.
12. Businesses' rating of the quality of the advice received has reduced since 2015, with just 40% rating it as at least "good" compared to 51% in 2015.

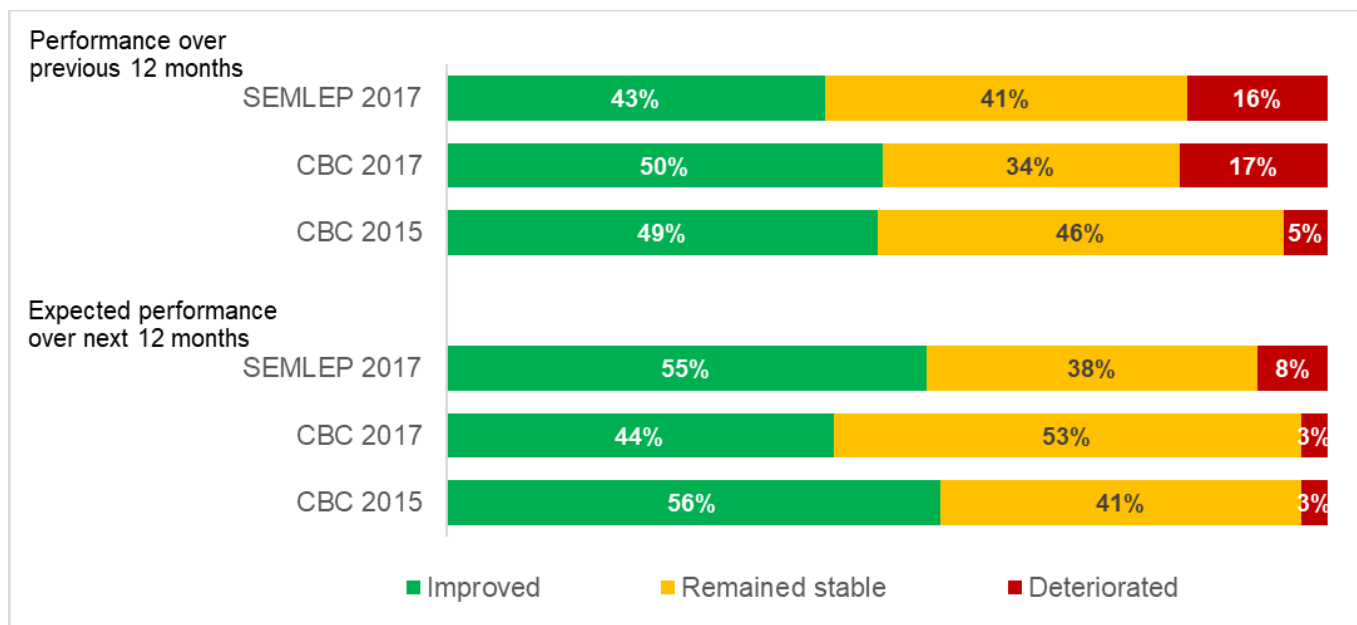
Business performance

13. The performance of Central Bedfordshire businesses over the past 12 months has been, on the whole, positive, with half of businesses reporting their performance has improved compared to just 17% saying it has deteriorated. This is a more positive picture than is seen

across SEMLEP as a whole. However, the proportion saying business has declined has increased more than three-fold since 2015.

14. Business confidence for the future has fallen from the levels seen in 2015 and is lower than is seen across SEMLEP as a whole, although businesses are still unlikely to expect to see a deterioration in their performance.

Figure 2: Business performance over previous 12 months, and expected performance over next 12 months



Number of respondents: SEMLEP 2374, CBC 2017 252, CBC 2015 255.

Questions asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? Over the next 12 months, do you expect your business performance to improve, remain stable or deteriorate?

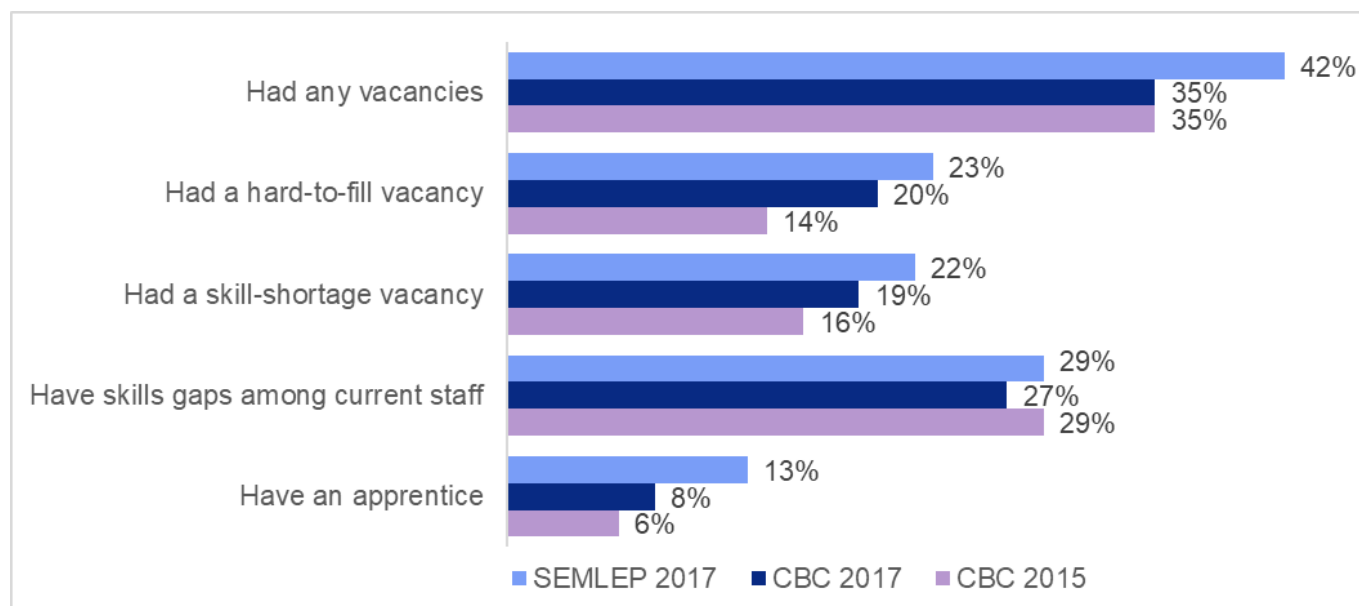
15. Overall, 96% of businesses were able to name at least one external factor that was proving a constraint on business growth. The most commonly reported constraint on business growth in the Central Bedfordshire area was a lack of skilled labour (also commonly cited across SEMLEP).
16. The UK's upcoming exit from the European Union is causing some concern among businesses, with over a third (38%) expecting to see a negative impact compared to just 15% expecting the impact to be positive.
17. Businesses believe the most important things the Council and other support organisations could do to help their business are lower business rates (24%), providing or assisting them to find suitable premises (8%) and general investment in the local area (6%).

Employment, skills and training

18. Just over a third (35%) of businesses reported having had at least one vacancy in the 12 months preceding the survey. This is comparable to the figure seen in 2015 but lower than the SEMLEP average of 42%.
19. Over half of businesses that had vacancies (56%) reported they had found at least one of these vacancies hard to fill. This is an increase on the levels seen in 2015 (39%) and 2014 (43%). This 56% equates to 20% of all businesses, again higher than seen in 2015 (14%)

but comparable to SEMLEP as a whole (23%).

Figure 3: Summary of key employment, skills and training figures



Number of respondents: SEMLEP 2374, CBC 2017 252, CBC 2015 255.

20. Just over half (53%) of employers with vacancies could list at least one skill they had trouble recruiting for in the previous year. This equates to 19% of all businesses; which is broadly in line with the position in 2015 (16%), and the SEMLEP average (22%).
21. The majority of businesses believed their workforce to already be well skilled, however 27% were able to list at least one skill their staff were lacking (a “skills gap”), which is also in line with figures seen in 2015 and across SEMLEP (both 29%).
22. Overall, 8% of businesses had a current apprentice (on a recognised government apprenticeship scheme) at the time of the survey. This was comparable to 2015, but lower than the figure seen across SEMLEP as a whole (13%). A further 37% of Central Bedfordshire businesses said they would consider taking on an apprentice, leaving 55% who would not consider employing apprentices.

Innovation

23. Innovation levels have fallen when compared with previous years: 20% of businesses said they had introduced any new products, services, patents or processes in the 12 months preceding the survey (compared to 29% in 2015 and 25% across SEMLEP). 22% of businesses expected to innovate in the coming 12 months (compared to 33% in 2015 and 31% across SEMLEP).
24. Of those not innovating, the majority (71%) said it was not something they were even thinking about, either because they had other priorities or they did not consider it relevant to their business. The excessive perceived economic risk was also a major barrier, mentioned by approaching two-thirds (62%) of non-innovators; related to this 11% said they were uncertain of the demand for innovation, goods and services. Financial factors and skills were also mentioned.
25. Overall 10% of businesses in the region had links with universities or colleges for research and development purposes. This is similar to previous years and to the SEMLEP average.

Regulation

26. Almost two-thirds (64%) of businesses said they believe that, on the whole, effective regulation supports their business operations. This was an increase on levels seen in 2015 (50%). Of those who did not feel supported by regulation, the vast majority (94%) said this was because there was too much regulation.

SEMLEP

27. Overall, 20% of businesses said they had heard of SEMLEP prior to the survey. This is consistent with the number seen in 2015, which was an increase on 2014 levels, and is in contrast to the pattern seen across the SEMLEP area as a whole, which has seen a reduction in awareness (to 13%).
28. Businesses aware of SEMLEP had most commonly heard of them through communications from their Local Authority (50%). This was higher than for SEMLEP overall (28%) and may go some way to explaining why levels of awareness in Central Bedfordshire were higher than elsewhere.
29. Businesses believe that the strategic focus of SEMLEP should primarily be on business support (35%). However, over a third of businesses said they did not know what SEMLEP's priorities should be, suggesting they were unaware of SEMLEP's role and how it can help businesses.

SEMLEP Business Survey 2017: Central Bedfordshire Council

Main Report

Section 1: Introduction

Introduction and background

- 1.1. The South East Midlands Local Enterprise Partnership (SEMLEP) is one of 38 LEPs in England tasked with determining local economic priorities and undertaking activities aimed at driving economic growth and increasing jobs, via a business-led partnership. SEMLEP covers an area made up of 14 local authorities¹, including Central Bedfordshire. The LEP is in an area encapsulating over 90,000 businesses and generating an economy worth in excess of £50bn².
- 1.2. This report presents the findings from the 2017 SEMLEP Business Survey for Central Bedfordshire. It provides analysis to support and inform SEMLEP and Central Bedfordshire's strategy and activities, and shows comparisons to SEMLEP overall, over time and by other variables such as business size where possible to build a picture of the needs of businesses in the area.

Aims and Objectives

- 1.3. The survey's overarching aim was to identify the economic challenges and opportunities facing businesses in the area to inform SEMLEP and local authority approaches to the development and delivery of their economic development activities.
- 1.4. Specific issues covered by the survey are:
 - Perceptions about SEMLEP
 - Quality of the local area as a business location
 - Business engagement and support
 - Business performance
 - Employment, skills and training
 - Innovation
 - Regulation

¹ Aylesbury Vale, Bedford, Central Bedfordshire, Cherwell, Corby, Daventry, East Northamptonshire, Kettering, Luton, Milton Keynes, South Northamptonshire, Northamptonshire, Northampton City and Wellingborough.

² Source: <http://www.semlep.com/> accessed 08/08/2017.

Approach to the research

- 1.5. A total of 2,374 interviews were carried out via CATI (computer assisted telephone interviewing) over a six-week period between mid-June to the start of August 2017.³ In total, 252 of these interviews were with Central Bedfordshire businesses. Interviews took an average of 20-25 minutes to complete, and were conducted with decision makers.
- 1.6. Surveys were completed at the establishment level, that is to say, 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. This ensured the information collected reflects the local picture.
- 1.7. The questionnaire was based on that used in the 2015 survey, with a few changes to reflect updated priorities and challenges of the area. Questions were added about the UK's exit from the European Union, the work experience offered by businesses and their working practices. Central Bedfordshire also included some questions specific to the area. The full questionnaire can be found in the appendix to this report.
- 1.8. Quota sampling was used to ensure a representative split of businesses by size and sector. Quotas were set in proportion to the SEMLEP business population statistics, sourced from the Office of National Statistics⁴. Quotas were achieved to within 1-2% of the original target, weighting was then applied to ensure the final data was fully representative of the business population.
- 1.9. The business population in Central Bedfordshire is heavily weighted towards small and micro establishments with 98% of businesses having fewer than 50 staff and 77% fewer than 5. Professional, scientific and technical activities is the biggest sector in terms of the number of establishments there are in the area (16%); construction (14%) and businesses administration and support services (12%) are also common.

A note on this report

- 1.10. This report presents the findings for the Central Bedfordshire local authority area, with analysis presented by key business characteristics where sample sizes allow. Comparisons to the overall SEMLEP findings are presented throughout.
- 1.11. This is the fourth time the SEMLEP business survey has been run. Central Bedfordshire has participated on every occasion, so where possible, comparisons are made to previous years.
- 1.12. With 2,374 respondents, the survey provides for statistically reliable data. At this number of respondents, the sample error or accuracy of the survey results is +/- 1-2% at a 95% confidence level, depending on the result. This means that we can be 95% confident that the "real" result for any given question would be within 1-2% of those stated within the survey findings. There were 252 interviews completed in Central Bedfordshire, which gives a confidence interval of +/- 4-6% at the 95% level, depending on the result. In crude terms, this means there needs to be a difference of between 5-8 percentage points between SEMLEP and Central Bedfordshire results to be statistically significant. It also means there needs to be a 10-16 percentage point difference for comparisons over time to be statistically significant.

³ The interview target for each local authority was set at 100. Seven local authorities including Central Bedfordshire chose to boost the number of interviews carried out in their area further to increase statistical reliability, and allow an individual report to be produced.

⁴ ONS UK Business Activity - Size and Location 2016.

Section 2: Quality of the Local Area for Business

Key Findings:

- Two-thirds of businesses in Central Bedfordshire rated their local area positively as a place to do business. This is comparable to previous years and to SEMLEP as a whole.
- Ratings on specific aspects were generally higher than seen across SEMLEP, and there have been several improvements since 2015. In particular, the area has seen large improvements in the ratings of aspects of the infrastructure.
- The lowest rated aspects were the local town centre (27% gave a positive rating), the local support available to businesses (41%), the availability of affordable housing (45%), locally available workforce (48%) and the average pay scales/wage levels for the area (53%).
- A tenth of businesses were looking at relocating their business; half of these within Central Bedfordshire but the remaining half (5% of all businesses) were looking at relocating outside of the SEMLEP area. The main reason given for this was a need for larger premises.

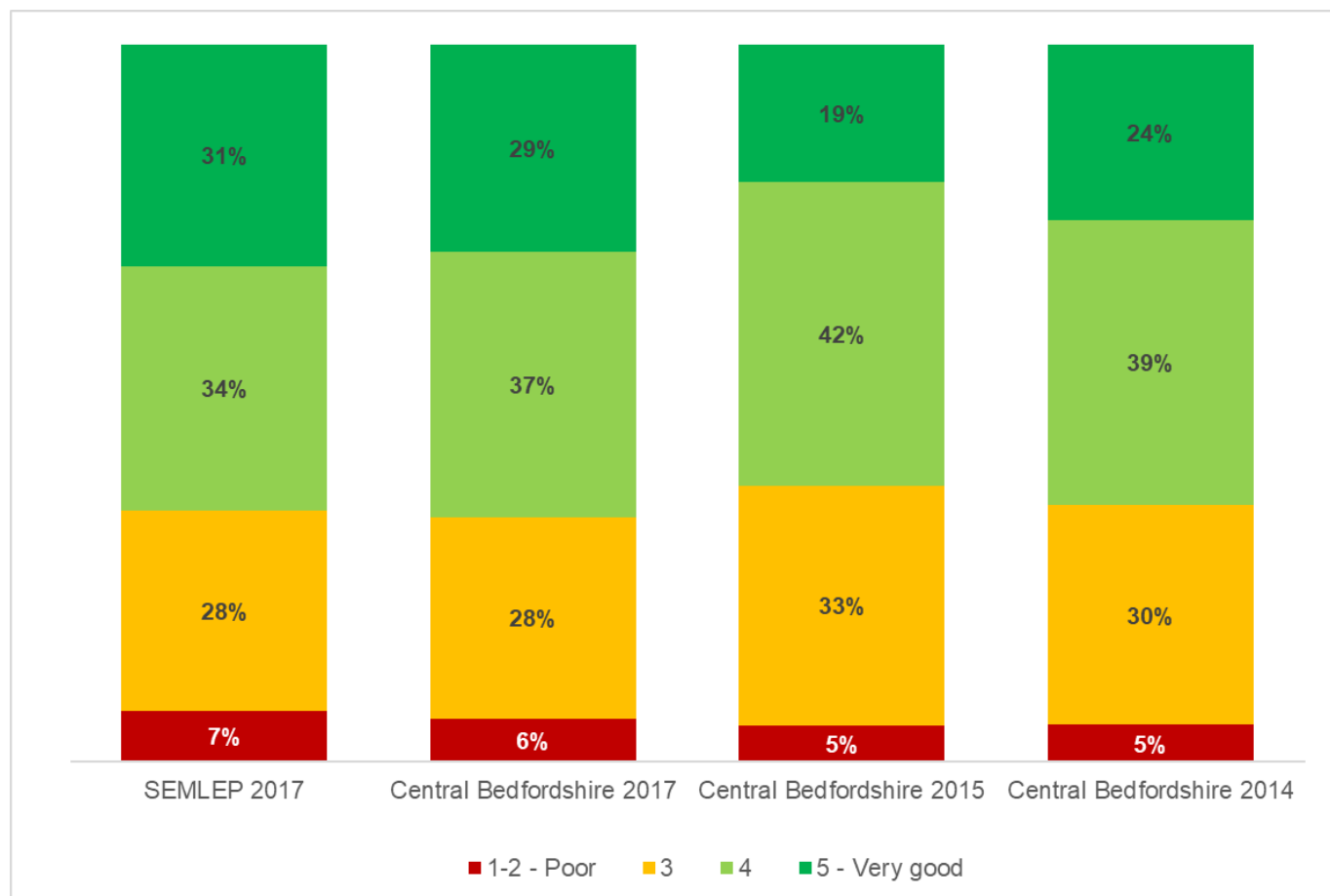
Introduction

- 2.1. This section looks at business perceptions of the local area as a place to do business, both overall and in terms of specific aspects of the business and labour market conditions, attractiveness of the area to live in and local infrastructure.

The area as a place to do business

- 2.2. Overall, two-thirds of businesses (66%) rated their local area as a good area to do business in, giving it a score of 4 or 5 out of 5. This is in line with previous years (61% in 2015, 63% in 2014, 60% in 2013) and with SEMLEP overall (65%).

Figure 2.1: Rating of the local area as a place to do business over time



Number of respondents: SEMLEP 2017 2,284; CBC 2017 227, 2015 255, 2014 261. Excludes don't know responses.
Question asked: Overall, how do you rate your location as a place to do business?

Availability and quality of key aspects of the area

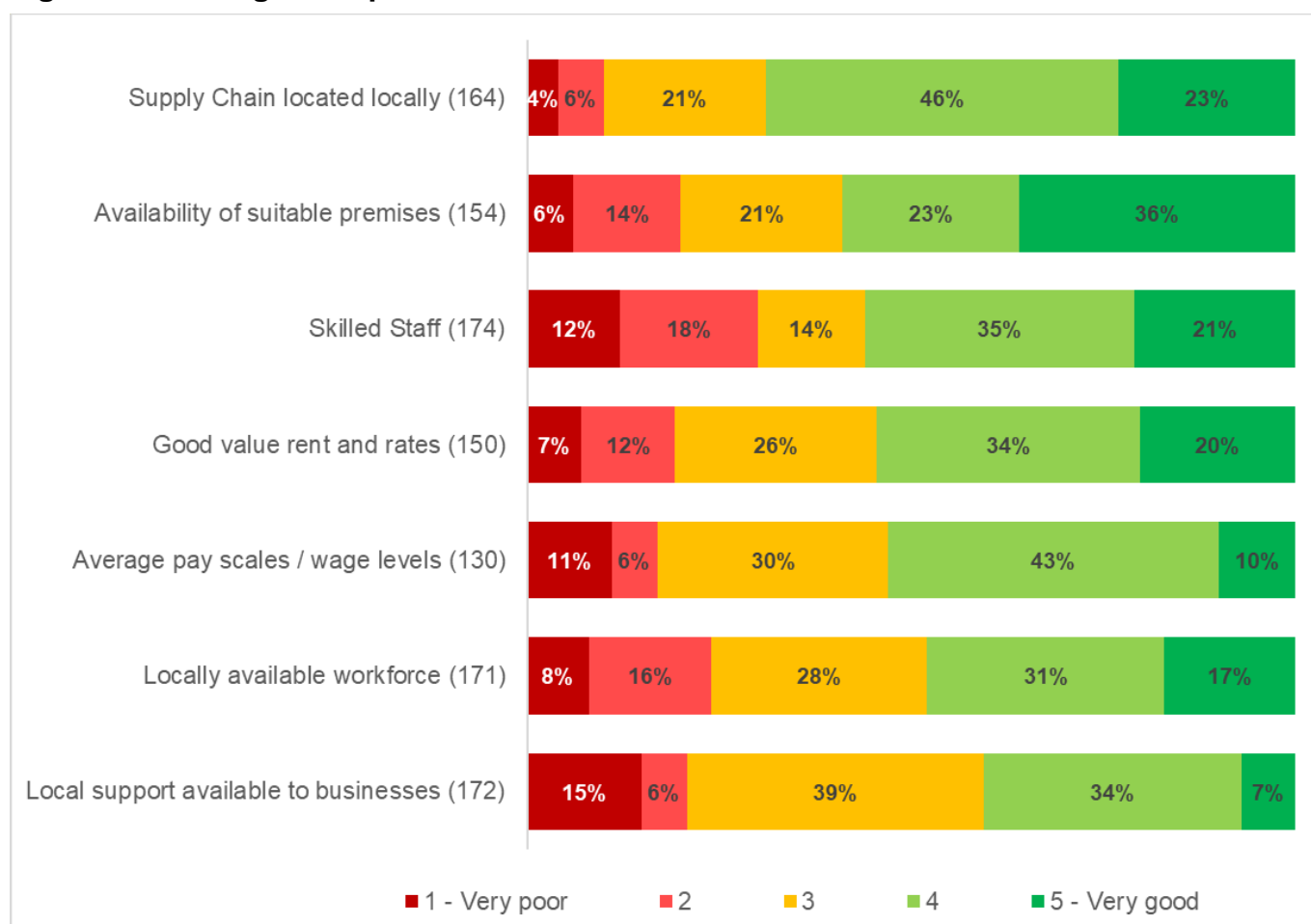
2.3. Businesses rated their local area on 19 different aspects from a business perspective. These can be grouped into three broad topics as follows:

Business conditions	As a place to live and work	Infrastructure
<ul style="list-style-type: none"> Supply chain located locally Skilled staff Locally available workforce Local support available to businesses Average pay scales/wage levels Availability of suitable premises Good value rent and rates 	<ul style="list-style-type: none"> Affordable housing Good quality schools/colleges Proximity to universities Attractive surroundings Availability of local services (such as retail and leisure) The local town centre 	<ul style="list-style-type: none"> Road network Rail network Airport access Public transport Walking/cycling routes Ease of transportation of freight

Ratings of business and labour market conditions

- 2.4. Ratings were on the whole positive for aspects relating to the business and labour market conditions in the local area, with more businesses giving positive responses than negative. That said, the survey highlights areas for improvement, in particular relating to the local support available to businesses. This was the same as the picture across SEMLEP.
- 2.5. Rural businesses provided lesser ratings than urban businesses for three of these aspects. 52% of rural businesses rated access to skilled staff at 4 or 5, compared with 62% of urban businesses. Similarly, 45% of rural businesses rated the locally available workforce at 4 or 5, compared with 54% of urban businesses. Finally, 40% of rural businesses rated availability of suitable premises at 4 or 5, compared with 59% of urban businesses.

Figure 2.2: Ratings of aspects of business and labour market conditions in local area

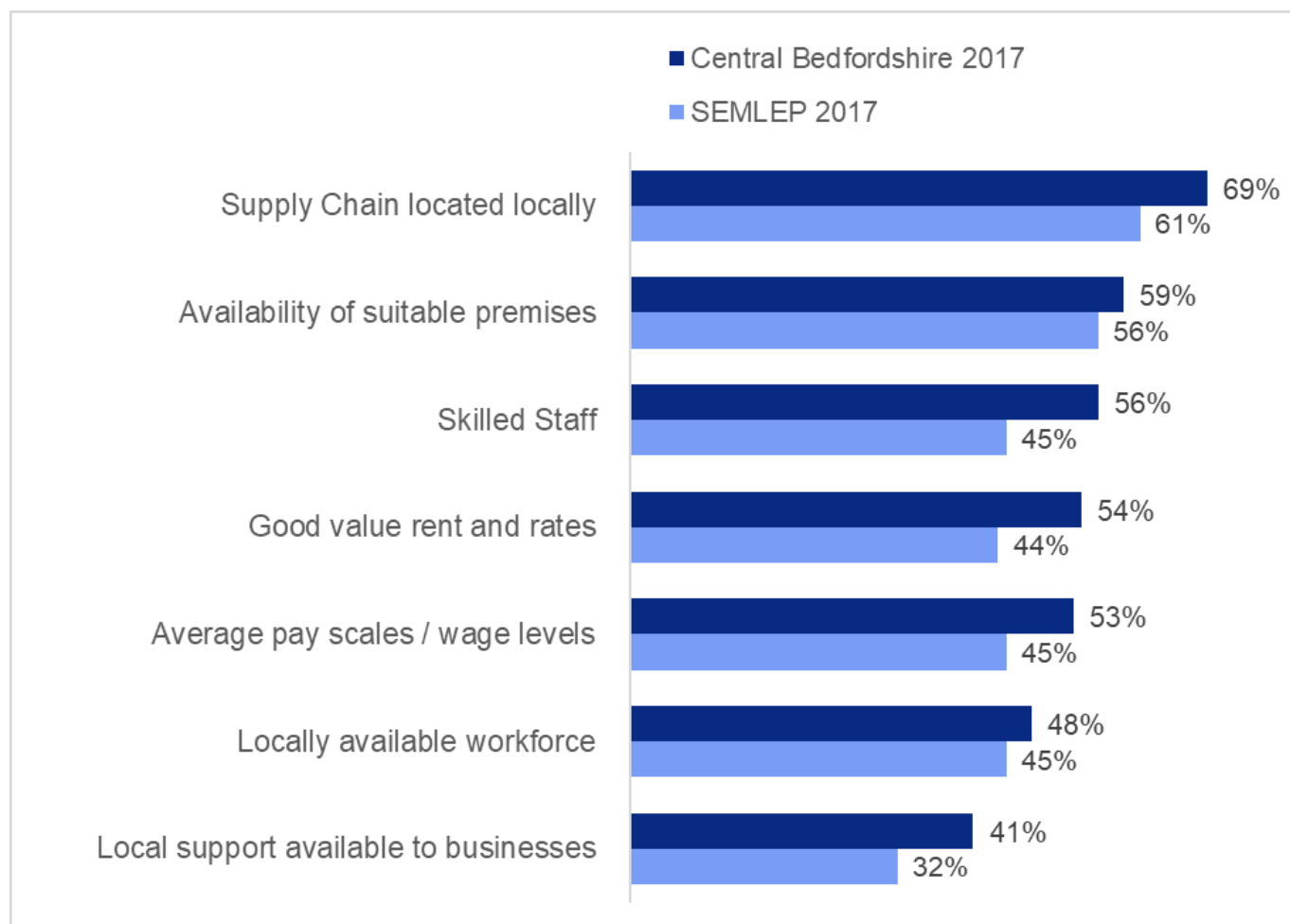


Numbers in brackets are the number of responses to each question (excludes "don't know" responses).

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

- 2.6. Ratings for aspects of business and labour market conditions in the local area were higher across the board than ratings given by businesses across SEMLEP as a whole, although the difference for two aspects, availability of local premises and locally available workforce, did not reach statistical significance.

Figure 2.3: Proportion of businesses giving a rating of 4 or 5 out of 5 for aspects of business and labour market conditions in local area vs. SEMLEP

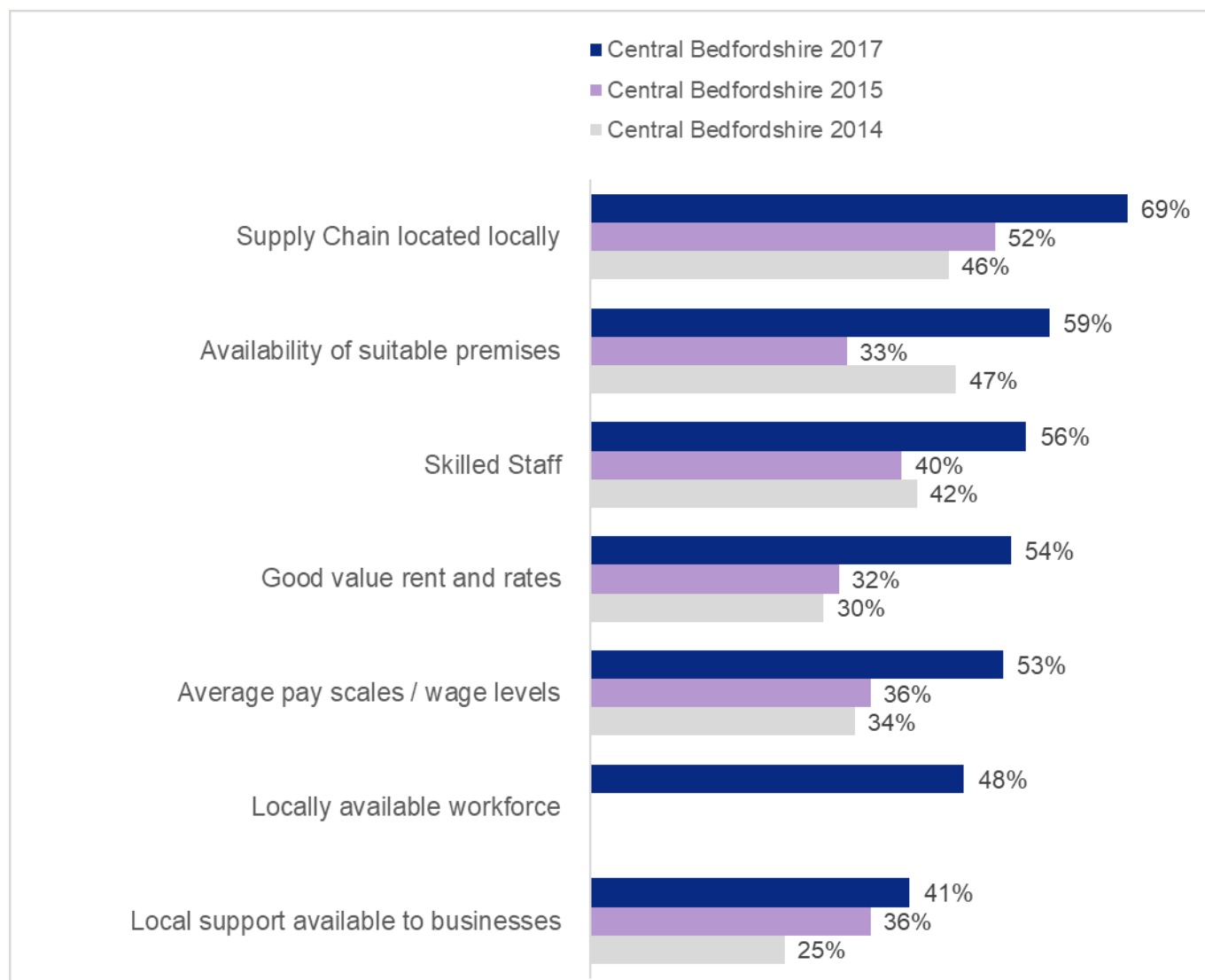


Number of respondents: SEMLEP 2,370, CBC 252. Excludes don't know responses.

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

- 2.7. The time series analysis paints a positive picture, with large improvements perceived since 2015 for almost every aspect. The largest improvements have come in the availability of suitable premises (26 percentage point improvement) and the value of rent and rates (22 percentage point improvement).
- 2.8. However, the rating of the local support available to businesses has remained static; this is also the lowest rated aspect of the business and labour market conditions in the area.

Figure 2.4: Proportion of businesses giving a rating of 4 or 5 out of 5 for aspects of business and labour market conditions in local area: time series



Number of respondents: 2017 252, 2015 255, 2014 261. Excludes don't know responses.

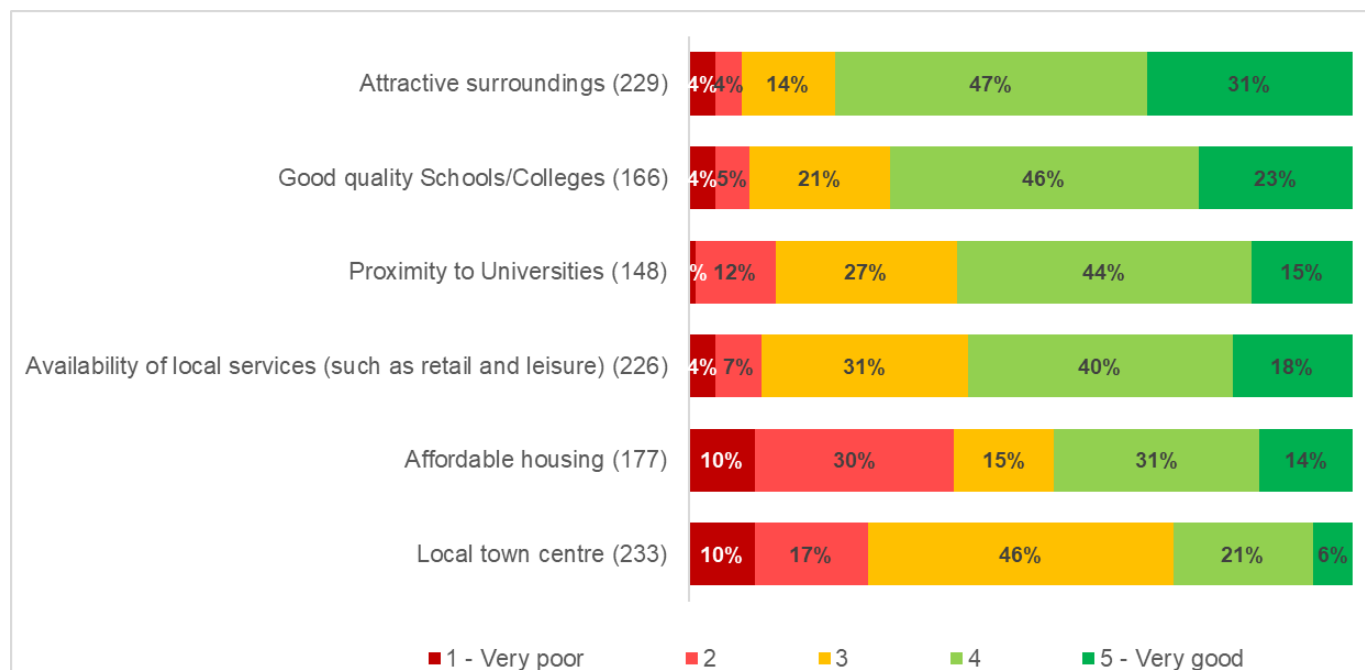
Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

There is no time series comparison for "locally available workforce", this question is new for 2017.

Ratings of the area as a place to live and work

- 2.9. The area is rated very highly by businesses, with attractive surroundings, good quality education options and a good availability of local services and amenities. However, there are lower ratings for the availability of affordable housing in the area: four-in-ten businesses (40%) think this is poor.
- 2.10. Views on the quality of the local town centre were polarised, with 27% giving a positive rating and 27% a negative one.

Figure 2.5: Ratings of aspects of the local area as a place to live and work

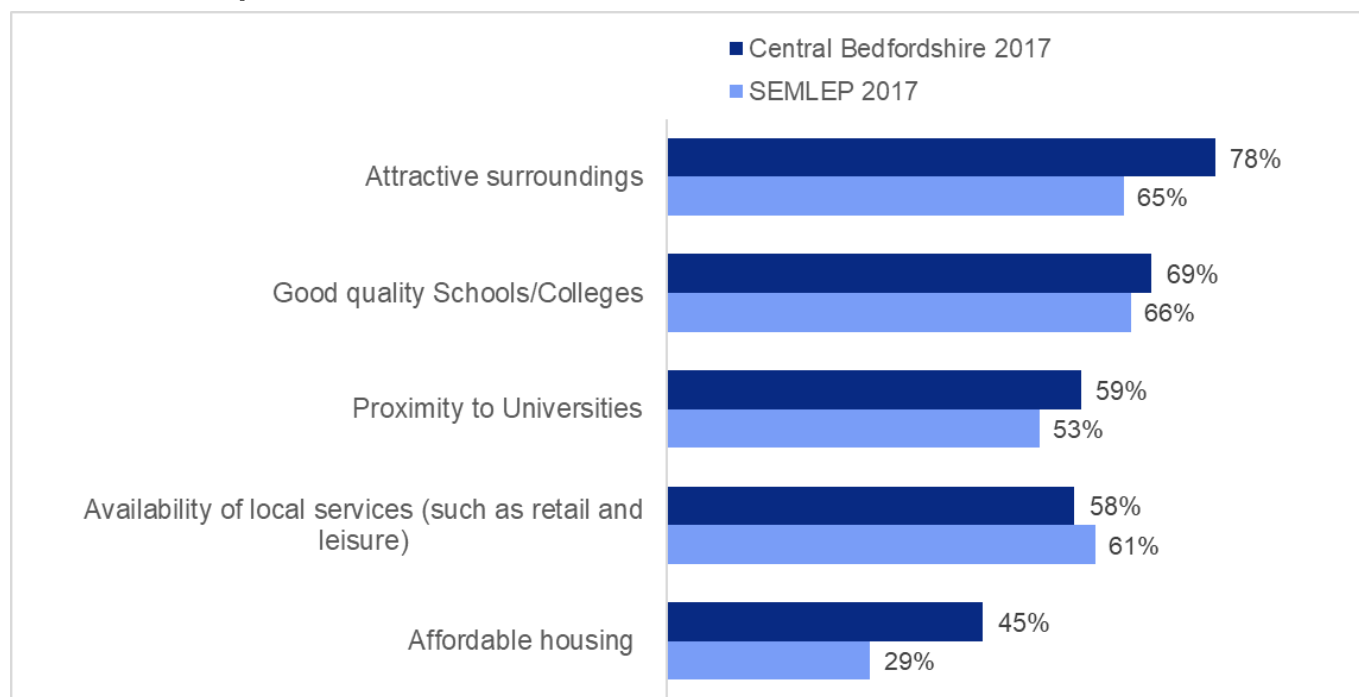


Numbers in brackets are the number of responses to each question (excludes “don’t know” responses).

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

2.11. Businesses in Central Bedfordshire rated the attractiveness of their surroundings more positively than businesses across SEMLEP as a whole. They were also more likely to be positive about the amount of affordable of housing, although this was still the lowest rated of the aspects of the area as a place to live and work.

Figure 2.6: Proportion of businesses giving a rating of 4 or 5 out of 5 for aspects of the local area as a place to live and work vs. SEMLEP

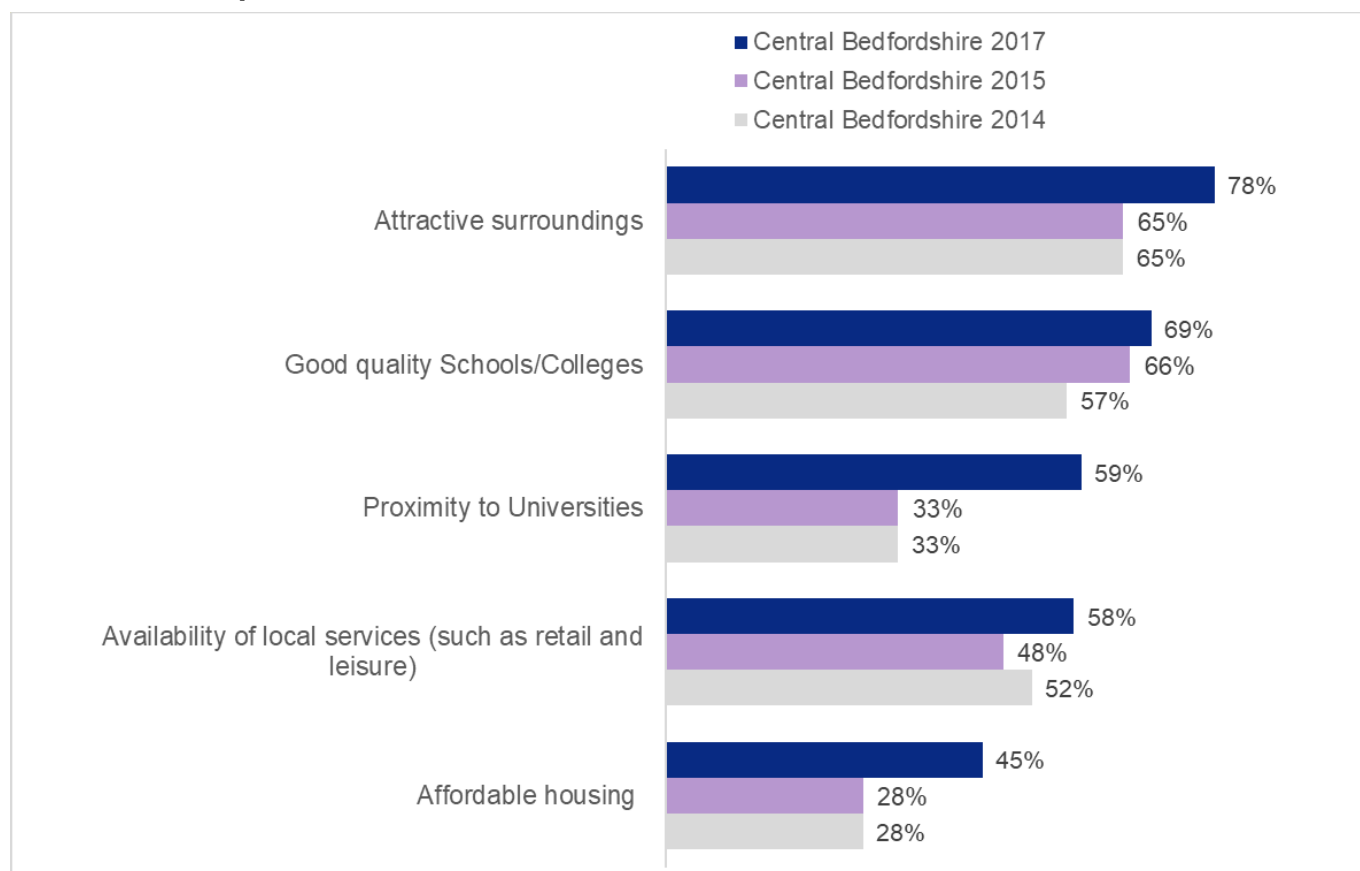


Number of respondents: SEMLEP 2,370, CBC 252. Excludes don’t know responses.

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective? Note: no SEMLEP comparison available for Local Town Centre.

- 2.12. The ratings for aspects of the local area as a place to live and work have seen some improvements in Central Bedfordshire, in particular the ratings of proximity to universities and the availability of affordable housing.

Figure 2.7: Proportion of businesses giving a rating of 4 or 5 out of 5 for aspects of the local area as a place to live and work: time series



Number of respondents: 2017 252, 2015 255, 2014 261. Excludes don't know responses.

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

Note: no time series comparison is available for Local Town Centre.

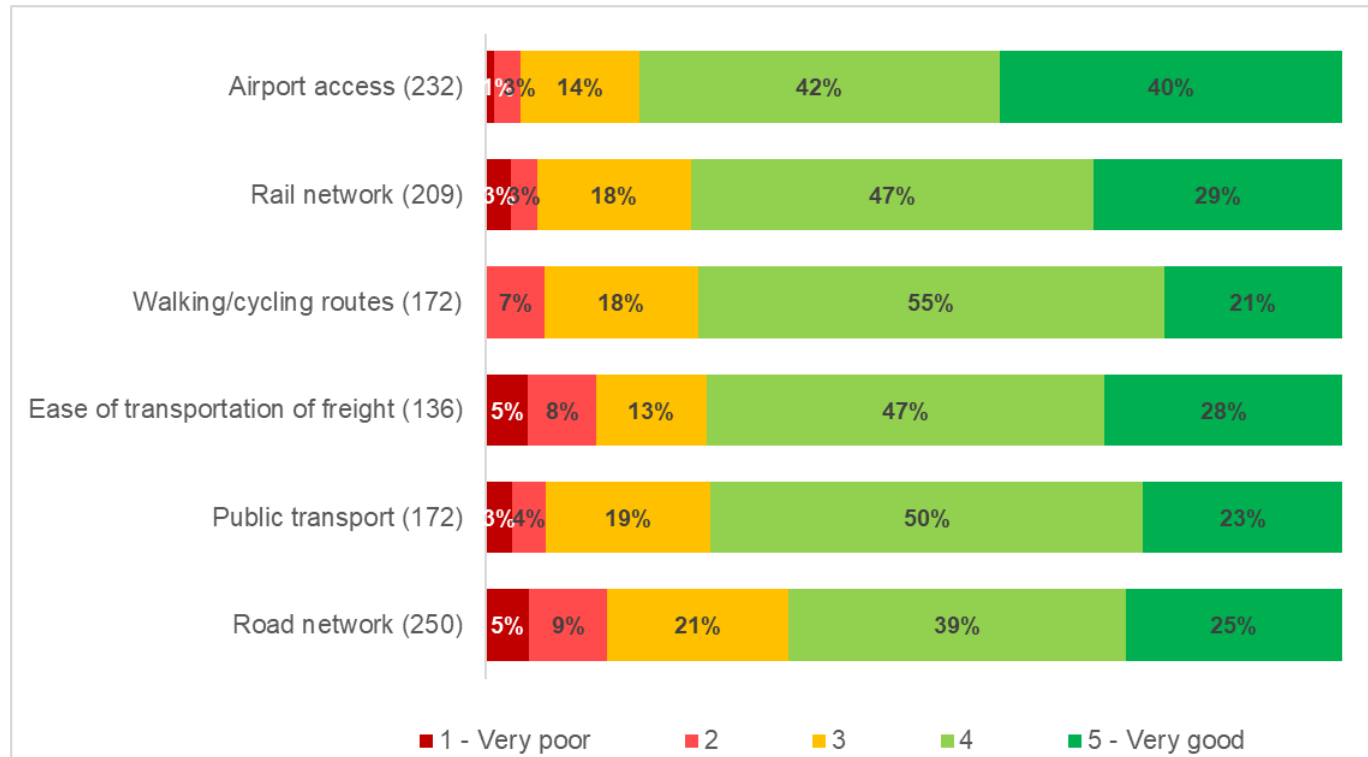
- 2.13. Businesses were asked what it was about the attractiveness of the surroundings that was most important to their business. A third (34%) said it was the general attractiveness of the area as a place to live and work that was most important, whereas a fifth (20%) thought the area immediately around their business premises was most important. However, 40% agreed that both were important (just 6% said neither was important to them).

Ratings of the local infrastructure

- 2.14. Overall, the local infrastructure received a positive evaluation by businesses, with every aspect covered receiving a “good” or “very good” rating by over half of businesses who felt able to give a response.
- 2.15. Access to airports scored highest, with 82% of businesses rating this “good” or “very good”.
- 2.16. Businesses in rural areas provided lower ratings for roads and public transport than businesses in urban areas. For example, 54% of rural businesses rated the roads at 4 or 5, compared with 70% of urban businesses. And 49% of rural businesses rated public

transport at 4 or 5, compared with 82% of urban businesses.

Figure 2.8: Ratings of aspects of the local infrastructure

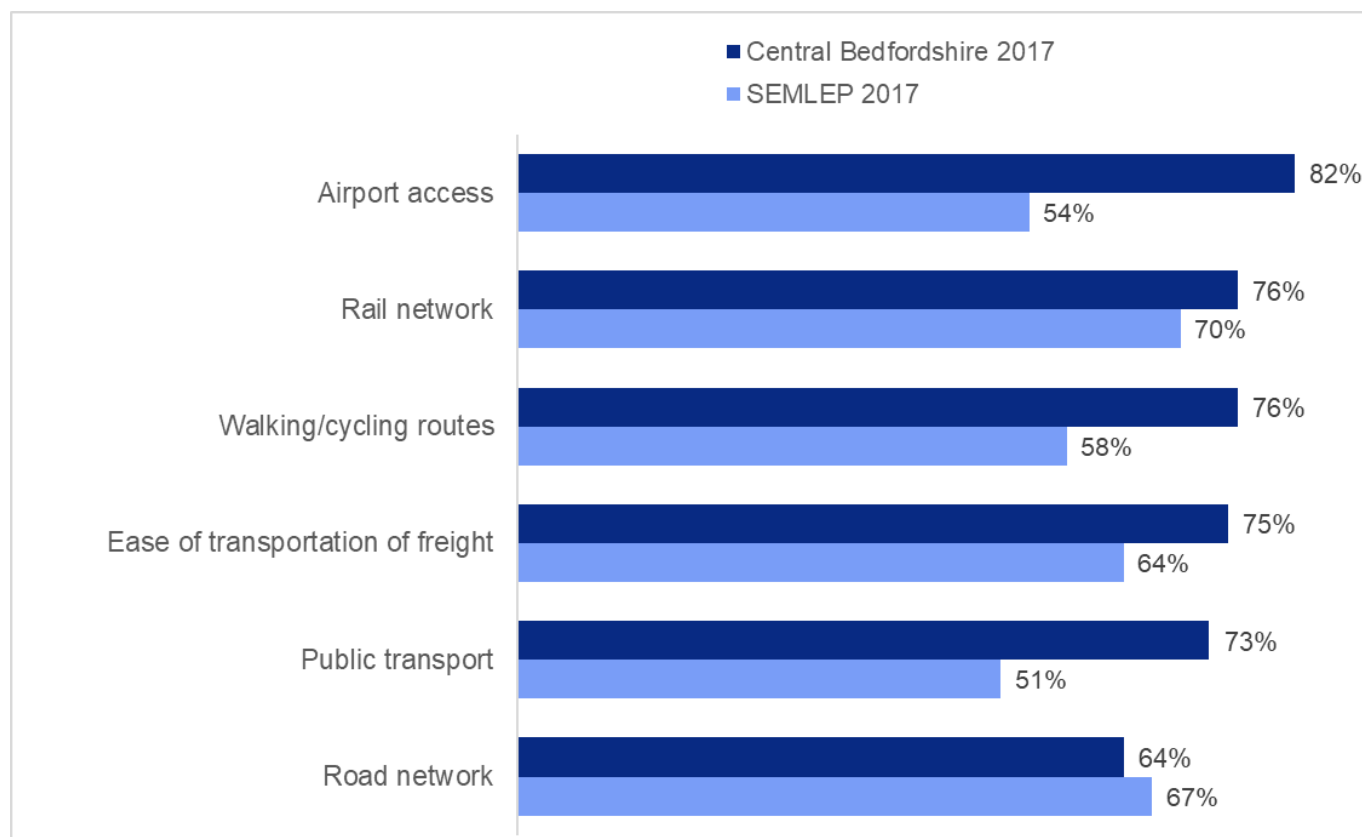


Numbers in brackets are the number of responses to each question (excludes “don’t know” responses).

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

- 2.17. Businesses in Central Bedfordshire rated the infrastructure of the area more highly than businesses across SEMLEP as a whole. In particular, access to airports was 28 percentage points higher, and public transport 22 percentage points higher.
- 2.18. The rail and road networks were the only two aspects for which businesses in Central Bedfordshire did not give significantly higher ratings than businesses across SEMLEP. Although it received almost the same score, the road network was the lowest-rated aspect of infrastructure for Central Bedfordshire whereas in SEMLEP as a whole it was second highest.

Figure 2.9: Proportion of businesses giving a rating of 4 or 5 out of 5 for aspects of the local infrastructure vs. SEMLEP

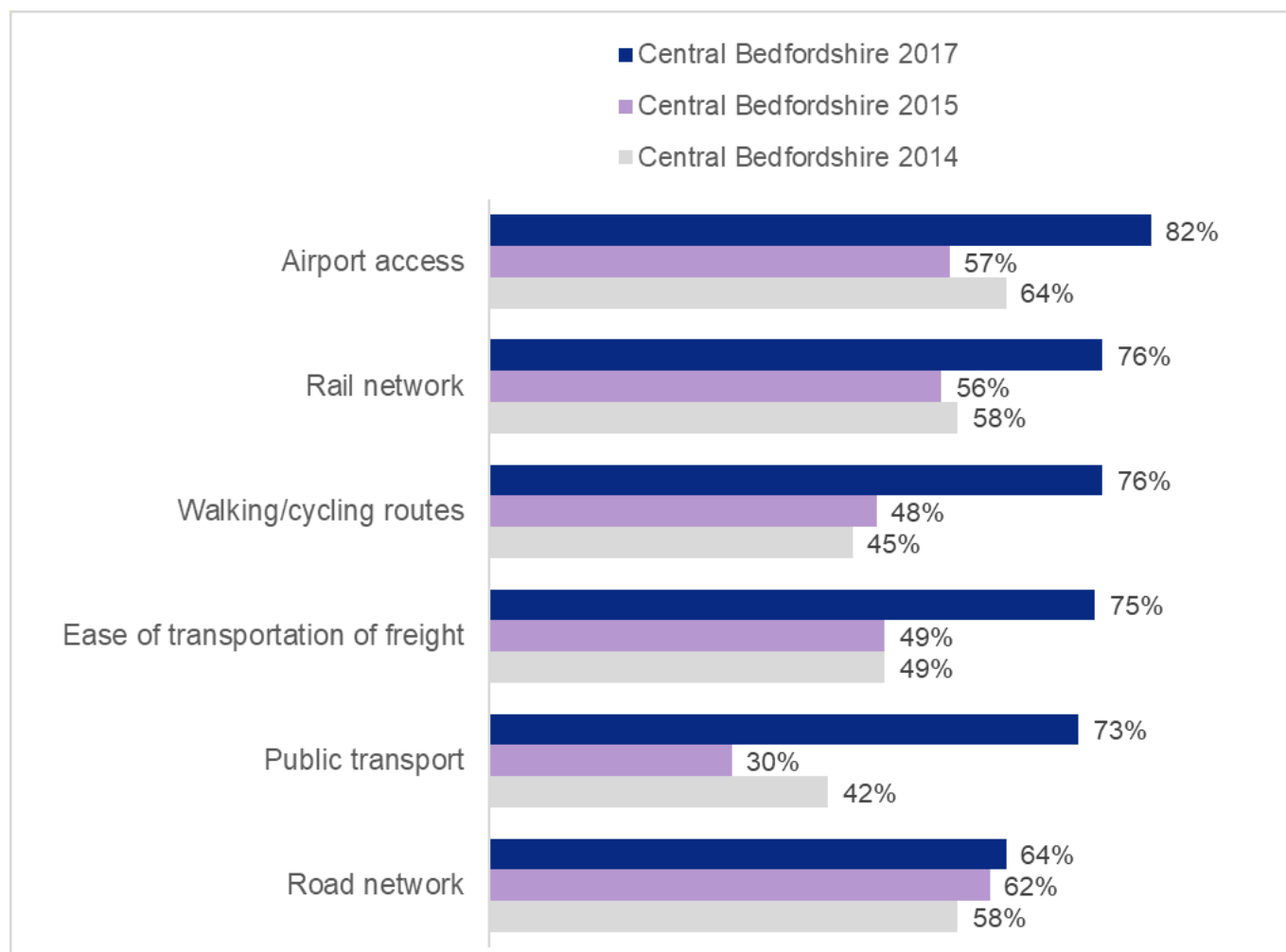


Number of respondents: SEMLEP 2,370, CBC 252. Excludes don't know responses.

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

- 2.19. As seen in SEMLEP overall, there has been an improvement in the rating given for every aspect of infrastructure covered by the survey since 2015. This was particularly the case for public transport, where positive ratings have more than doubled from 30% to 73%.
- 2.20. The road network was the only aspect not to have seen a significant rise in positive ratings since 2015; it is also the lowest rated of the infrastructure aspects in Central Bedfordshire.

Figure 2.10: Proportion of businesses giving a rating of 4 or 5 out of 5 for aspects of the local infrastructure: time series



Number of respondents: 2017 252, 2015 255, 2014 261.

Question asked: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective?

Potential for business relocation

- 2.21. Overall, 10% of businesses were thinking of relocating. Of these, half were looking to relocate within Central Bedfordshire (5%), and the remaining 5% were looking to relocate outside of the SEMLEP area.
- 2.22. The most common reason for considering relocation by some way was to move to larger premises (38%). To be closer to the town centre (11%) was the second most commonly mentioned reason, and a handful (5%) were looking for a higher specification.
- 2.23. For comparison, a similar proportion (13%) of businesses across SEMLEP as a whole were looking to relocate.

Section 3: Business Engagement

Key Findings:

- Businesses were more likely to disagree than agree that the Council provides value for money.
- Nearly all businesses had used some form of business support or advice in the previous 12 months (99%) – an increase on the 88% seen in 2015. This was most commonly from accountants; use of local and government-funded support schemes continues to be low.
- Just 6% of businesses were aware of the Velocity Growth Hub, with a further 2% having used it.
- Ratings of the quality of advice received overall had declined when compared to 2015; whilst 40% said it was good, a sizeable minority (23%) said the advice received was poor.

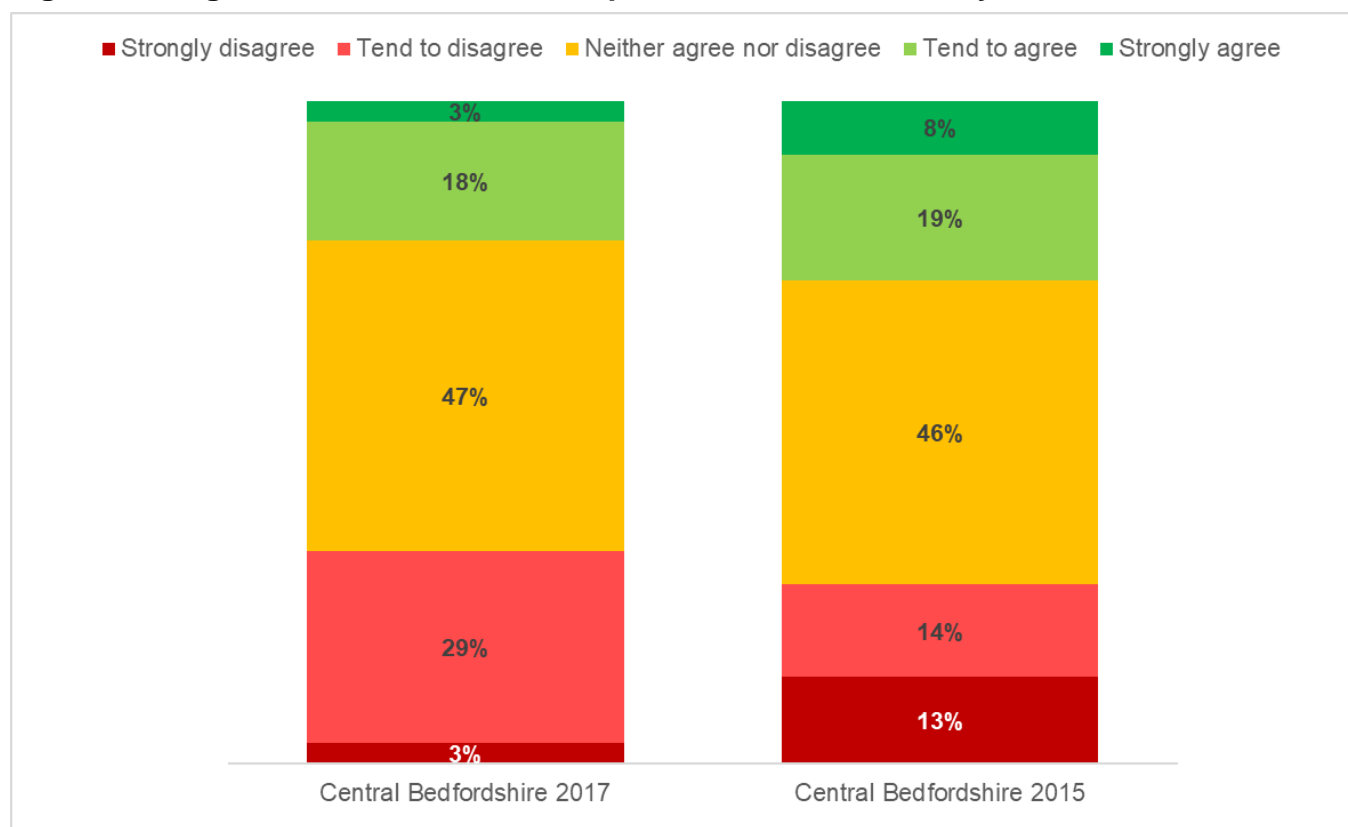
Introduction

3.1. This section looks at sources of business advice and support in the SEMLEP area, including the Velocity Growth Hub.

Value for money provided by the Council

3.2. Businesses were more likely to disagree (32%) than agree (21%) that the Council provides value for money. This was slightly more negative than the figures seen in 2015. However, the proportion saying they strongly disagree has reduced from 13% to just 3%.

Figure 3.1: Agreement that the Council provides value for money

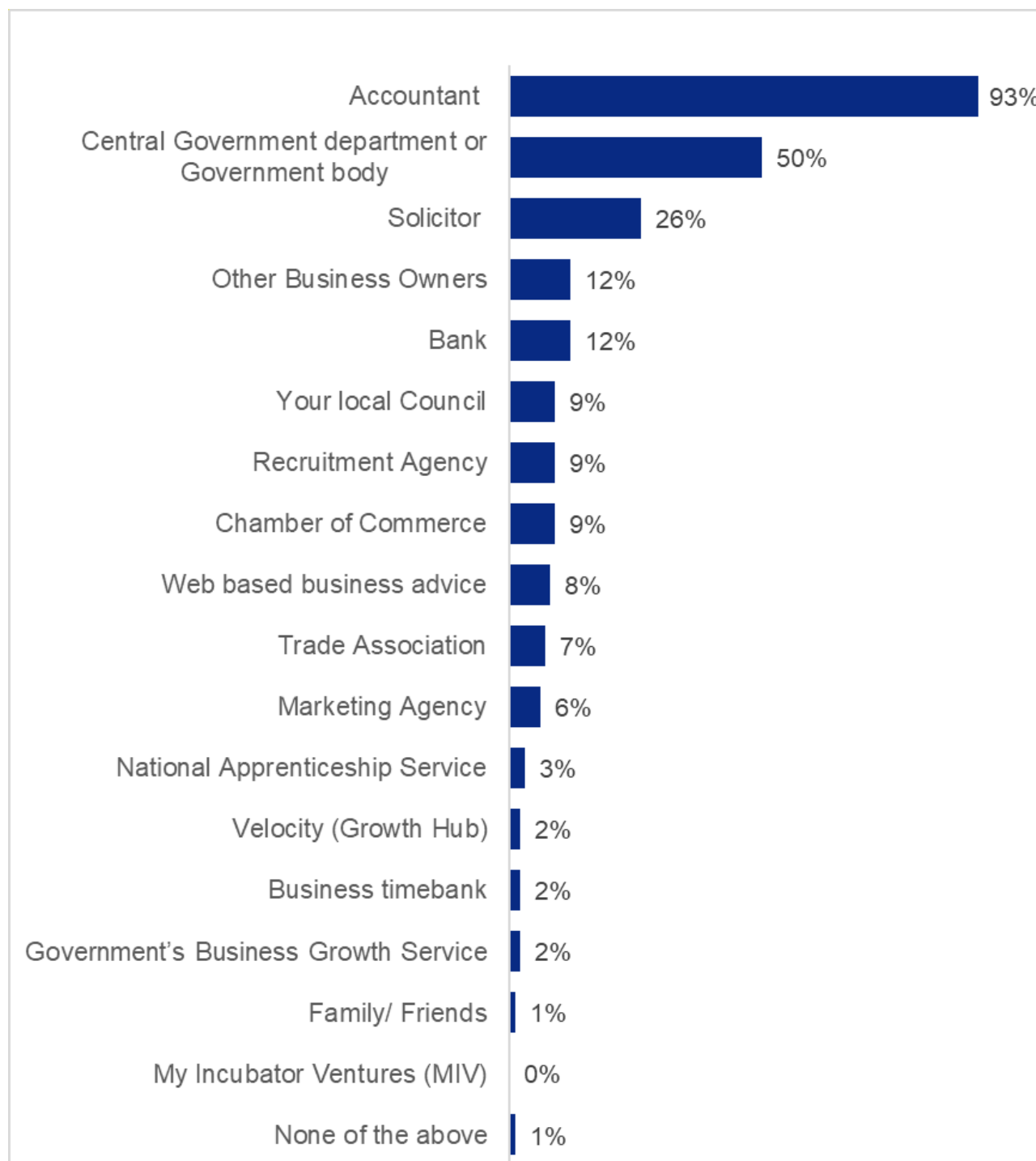


Number of respondents: 2017 231, 2015 246. Excludes don't know responses. Question asked: To what extent do you agree or disagree that the Council provides value for money?

Sources of business advice for all businesses

- 3.3. Nearly all businesses (99%) had used some form of business advice or support in the past 12 months (compared to 88% in 2015). This was most commonly advice from an accountant (93%), Central Government department or government body (such as HMRC, Jobcentre Plus) (50%) or a solicitor (26%).
- 3.4. Use of local initiatives was fairly low; only 2% had used the Velocity Growth hub and none of the businesses in the survey had used My Incubator Ventures. 9% had approached the Council for advice and 2% had used the business timebank service.

Figure 3.2: Sources of business advice and support



Number of respondents: 244.

Question asked: Have you used any of the following for business advice or support in the past 12 months?

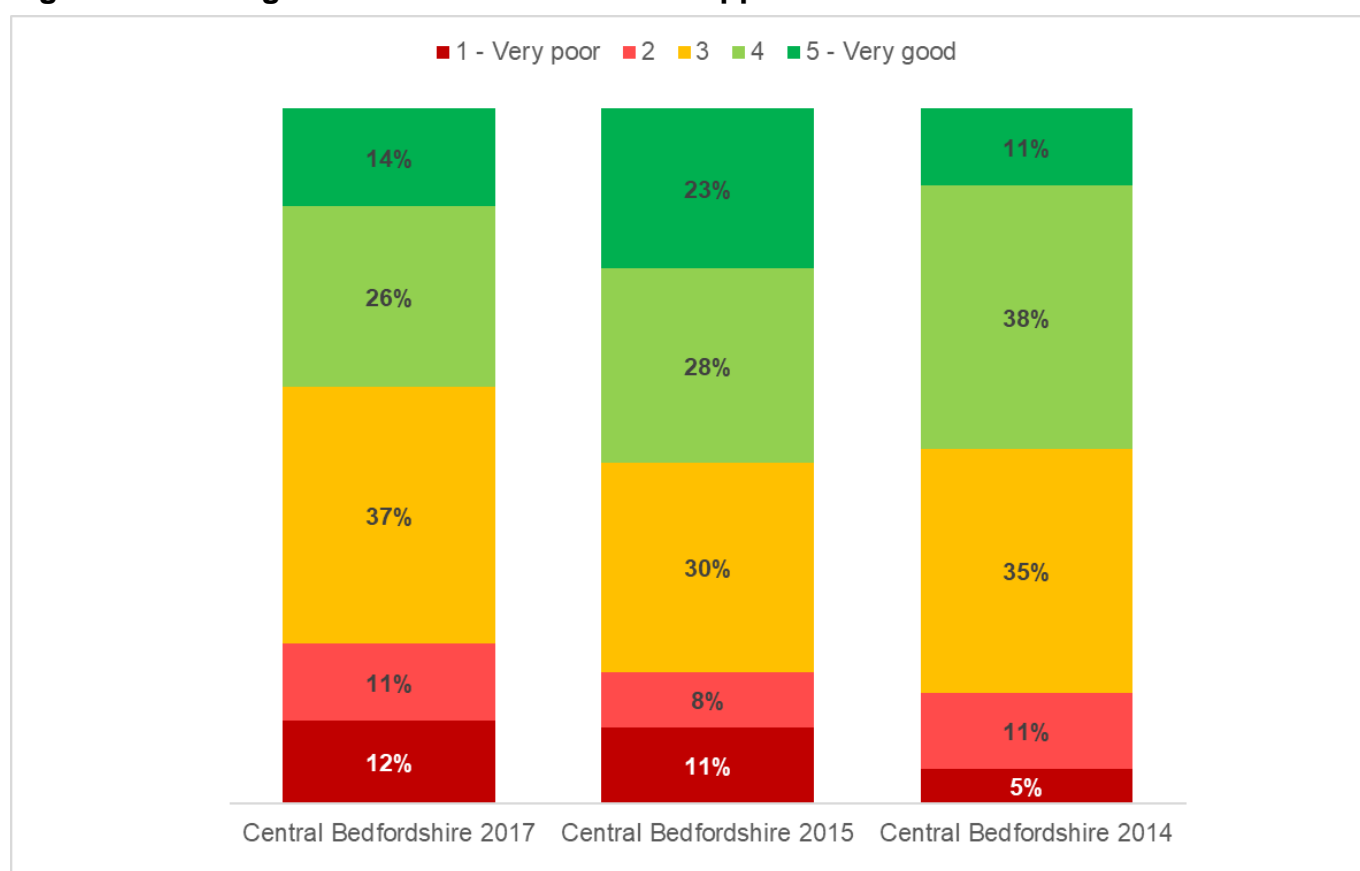
Growth Hubs

- 3.5. 16% of businesses who had not used the Velocity Growth Hub said they had heard of it. Combining this with the 2% who had used Velocity tells us that some 18% of all businesses had heard of Velocity.
- 3.6. In 2015 the question was phrased to ask if the business had used the “Velocity website”; 11% had done so. This is not directly comparable to the 2% who have used Velocity in 2017 as many would not equate visiting the website to using the service.
- 3.7. However, in 2015 28% of businesses reported that they were aware of Velocity, which is higher than the 18% seen in the present data (although again, this related to awareness of a website as oppose to a service).

Rating of business support and advice

- 3.8. The quality of the business advice received in the last 12 months has been varied, with 40% rating it “good” (4 or 5 out of 5) but 23% rating it “poor” (1 or 2 out of 5). The proportion giving a “poor” rating suggests a sizeable minority of businesses that are not getting the support they are seeking.
- 3.9. Ratings have reduced compared to previous years, particularly at the top end of the scale. The increase in negative ratings does not reach statistical significance, but the proportion giving a 5 out of 5, and the proportion giving any positive rating (4 or 5 out of 5 combined) are both significantly lower than in 2015.

Figure 3.3: Rating of the business advice or support received in the last 12 months



Number of respondents: 2017 229; 2015 188; 2014 194. Excludes don't know responses.

Question asked: Overall, how do you rate the business advice or support you have received in the last 12 months?

Section 4: Business Performance

Key Findings:

- The performance of businesses in Central Bedfordshire over the past 12 months has been, on the whole, positive, with half of businesses reporting their performance has improved compared to just 17% saying it has deteriorated. This is a more positive picture than is seen across SEMLEP as a whole. Whilst the proportion of businesses reporting an improvement remained consistent with 2015, there has been a three-fold increase in the proportion that said performance had deteriorated.
- Business confidence for the coming year is lower than it was in 2015, and lower than seen across SEMLEP as a whole. The most common outlook was the expectation that performance would remain stable (53%), but fewer are expecting an improvement than were expecting one in 2015 (44% vs. 56%).
- The most commonly cited constraint on business growth was a lack of skilled labour, mentioned by almost a third (31%) of businesses.
- There is concern in the area about the impact of the UK's exit from the European Union, with 38% expecting a negative impact compared to just 15% expecting the impact to be positive. Access to the single market is the biggest priority for businesses in the area.
- The support businesses would most like to see from the Council is lower business rates, although the provision of suitable premises has increased in importance since 2015.

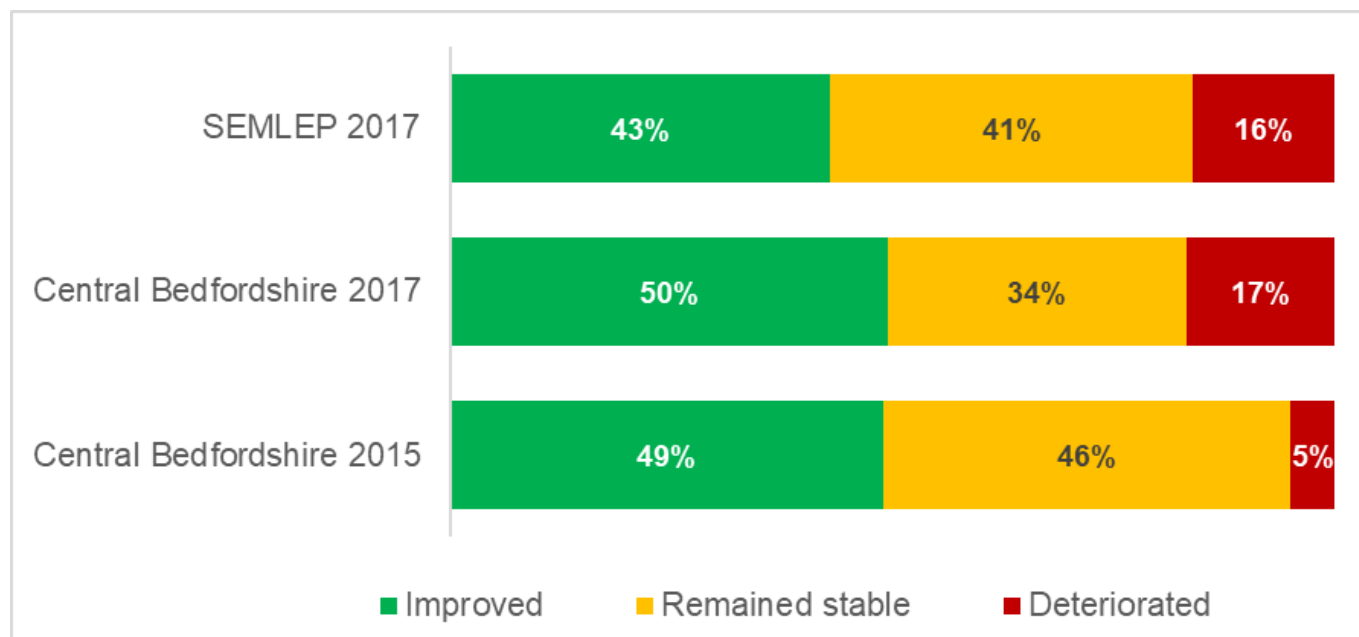
Introduction

- 4.1. This section presents the findings on the measures of business performance and anticipated growth, including constraints on growth and support to assist growth.
- 4.2. It also covers businesses' predictions for how the UK's departure from the European Union will affect their performance.

Past business performance

- 4.3. The performance of businesses in Central Bedfordshire over the past 12 months has been, on the whole, positive, with half (50%) of businesses reporting their performance has improved compared to just 17% saying it has deteriorated. This is a more positive picture than is seen across SEMLEP as a whole, where fewer (43%) said performance had improved.
- 4.4. Central Bedfordshire has not seen the same decline in positive performance as SEMLEP as a whole, where the proportion of businesses reporting growth had declined from 50% to 43%. In Central Bedfordshire, a similar proportion reported growth over the previous 12 months in 2017 (50%) and 2015 (49%). However there has been a three-fold increase in the proportion who said their business performance had deteriorated, from 5% to 17%.

Figure 4.1: Business performance over the previous 12 months



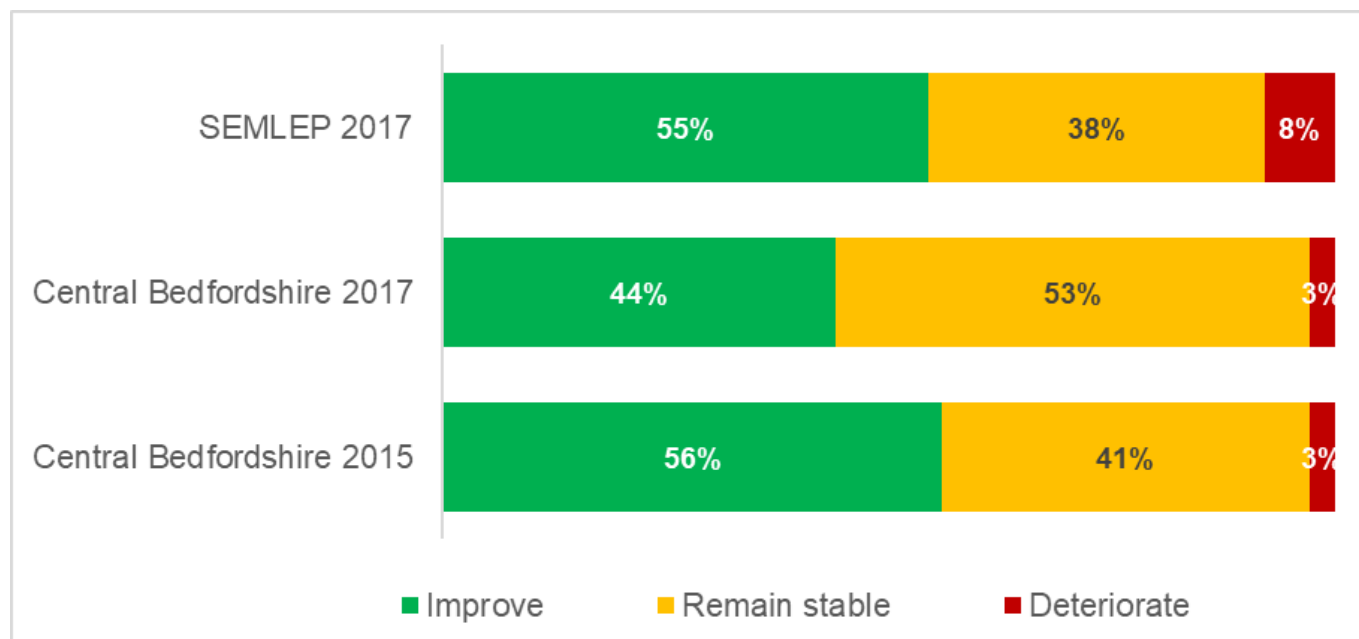
Number of respondents: SEMLEP 2017 2,365; CBC 2017 252, 2015 255.

Question asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated?

Future business performance

- 4.5. Despite the positive performance of businesses over the past 12 months, business confidence for the coming year has fallen from the levels seen in 2015 and is lower than that seen across SEMLEP as a whole. Overall, 44% of businesses said they expected their performance to improve over the next 12 months, compared to 56% in 2015 and 55% across SEMLEP as a whole.
- 4.6. Despite this, fewer businesses expected to see a deterioration in performance (3%) than across SEMLEP as a whole (8%). This is a similar level to that seen in 2015 (also 3%).
- 4.7. The majority expected their business performance to remain stable (53%).

Figure 4.2: Predictions of future business performance by size and time series



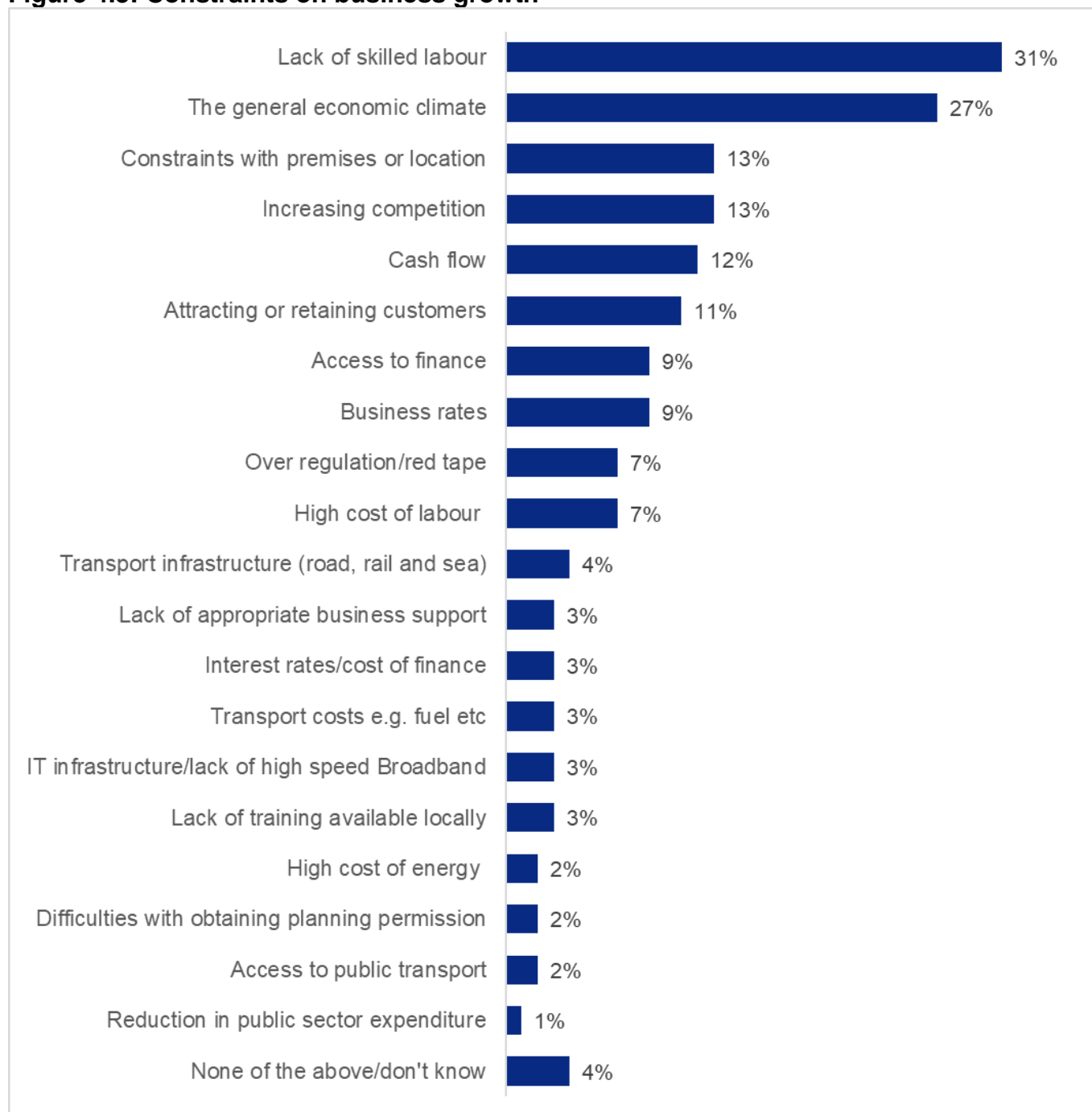
Number of respondents: SEMLEP 2017 2,338; CBC 2017 252, 2015 255.

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

Constraints on business growth

- 4.8. Overall, 96% of businesses were able to name at least one external factor that was proving a constraint on business growth.
- 4.9. The most commonly reported constraint on business growth in the Central Bedfordshire area was a lack of skilled labour, with 31% of businesses citing this factor.
- 4.10. The hierarchy of constraints and the proportion mentioning each was similar to that of SEMLEP as a whole, although fewer businesses in Central Bedfordshire mentioned issues with their premises or location (13% vs. 27%), increasing competition (13% vs. 25%) or attracting and retaining customers (11% vs. 21%).

Figure 4.3: Constraints on business growth



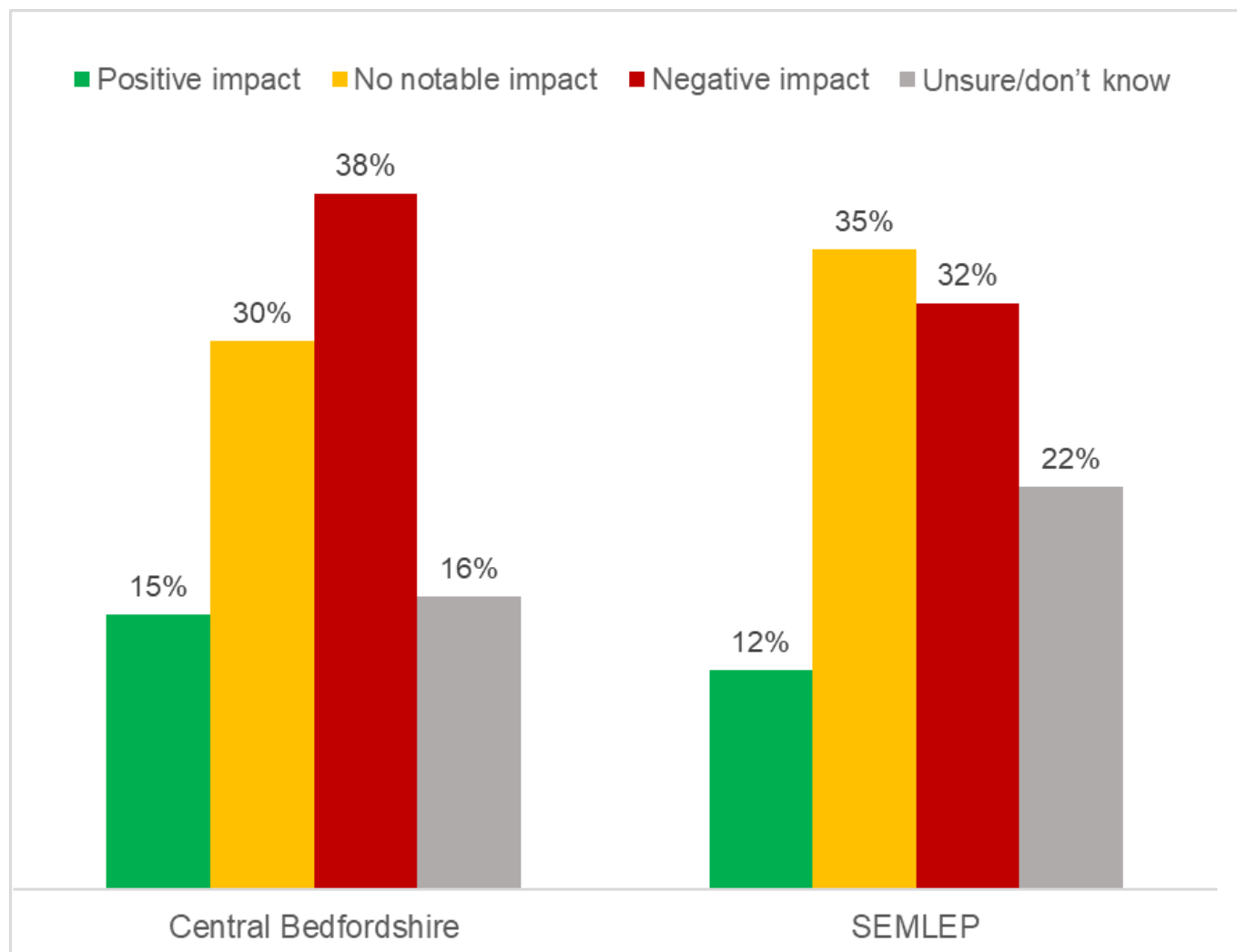
Number of respondents: 241.

Question asked: What do you consider to be constraints on your business growth? (Prompted list).

Leaving the European Union

- 4.11. Businesses in Central Bedfordshire were more likely to be negative than positive about the impact of Britain's exit from the European Union on their business. Almost four-in-ten (38%) said they expect to see a negative impact, whereas just 15% expect the impact to be positive. Three-in-ten (30%) expect to see no notable impact.
- 4.12. This picture is slightly more polarised than across SEMLEP as a whole, with larger proportions expecting to see a positive or negative impact and fewer expecting no impact.
- 4.13. Importantly, 16% said they do not know what the impact will be. This represents a large number of businesses facing uncertainty in the region.

Figure 4.4: Expected impact of the UK's exit from the European Union



Number of respondents: SEMLEP 2,370, CBC 252.

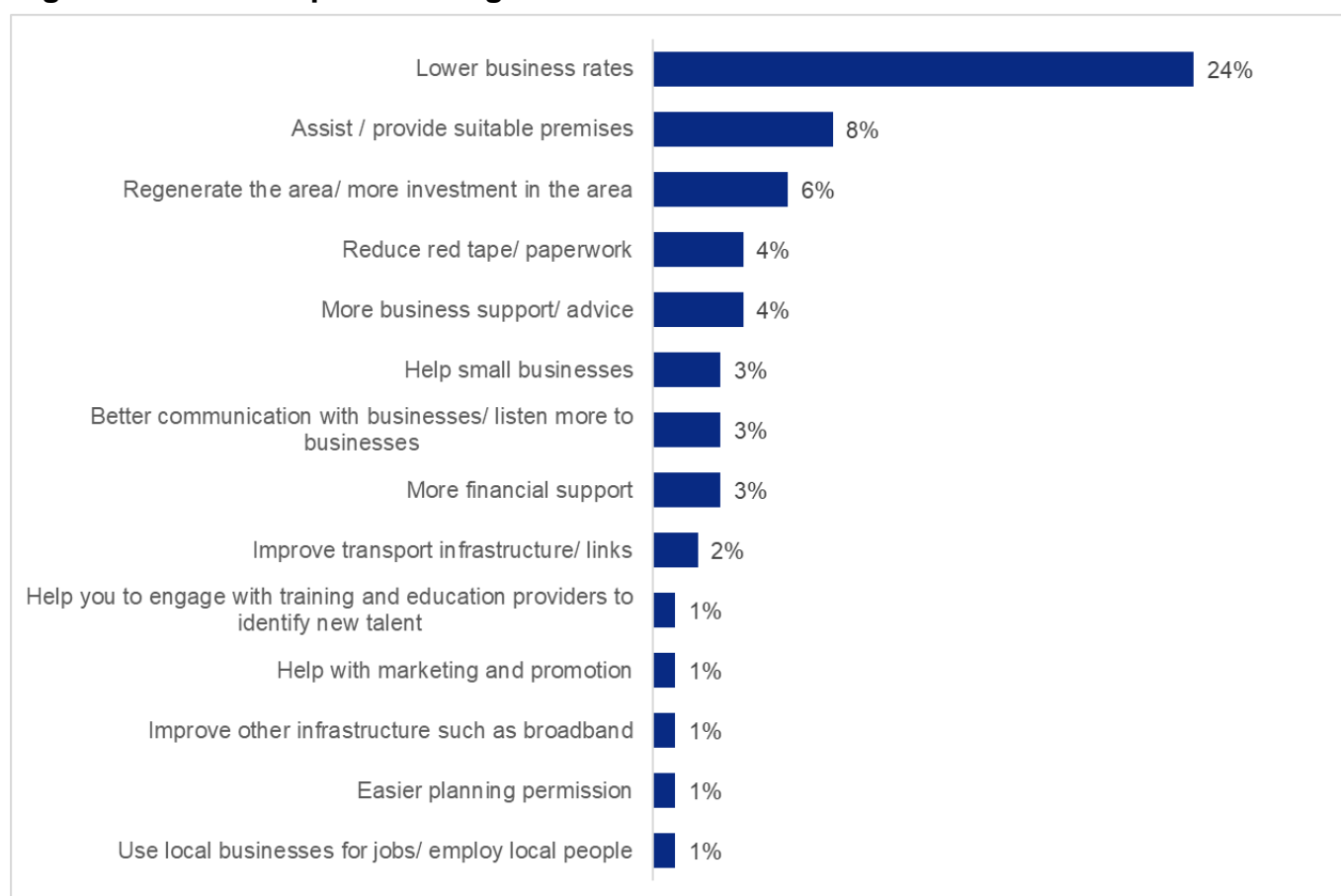
Question asked: Overall, what do you think will be the impact on your business, if any, of leaving the European Union?

- 4.14. Access to the single market was the biggest priority for businesses in the EU exit negotiations, with 32% saying this was a key issue for them. The availability of labour (12%) and skills (8%) were also mentioned frequently. A handful of businesses mentioned EU legal directives (2%), EU conformity mark on product standards (1%) and access to the international non-EU market (1%). This was similar to the priorities cited by businesses across SEMLEP as a whole.
- 4.15. It is noteworthy, however, that approaching half of businesses (45%) said none of the issues listed were key for them, and also did not name any additional issues of consideration. This suggests that these businesses are either unsure of the impacts or think that, whatever the outcome of negotiations, it will have little effect on their own business.

Support to assist growth

- 4.16. Businesses were asked to choose the three most important things the council and other support organisations could do to help them grow their business.
- 4.17. Lower business rates came out top, as it has done in previous surveys. The proportion citing this help has increased from 16% in 2015 to 24% in 2017. This demonstrates that costs are increasing in importance for businesses in Central Bedfordshire. The same was true across the SEMLEP region as a whole.
- 4.18. Businesses were also interested in help accessing suitable premises (8%) and increased investment in the local area, showing that although they were generally satisfied with the area (see Section 3) there are still improvements that could be made. The remaining support areas were each mentioned by fewer than 5% of businesses and can be seen in Figure 4.5.

Figure 4.5: Support businesses would like to see from Council and other support organisations to help business grow



Number of respondents: 211.

Question asked: What are the 3 most important things your local Council and other support organisations should do to help you grow your business?

Section 5: Employment, Skills and Training

Key Findings:

- Just over a third (35%) businesses had at least one vacancy in the 12 months preceding the survey; this was lower than the SEMLEP average (42%) but in line with 2015 figures.
- Over half of businesses with vacancies (56%) had found at least one of these vacancies hard to fill, equating to a fifth (20%) of all businesses; this is comparable to the SEMLEP average.
- Around half of businesses with vacancies reported having trouble finding certain skills among applicants for roles. Employers generally blame this on a low quantity and quality of applicants.
- Most businesses report their current staff to be well skilled for the job, however 27% could list at least one skill that was lacking among their current staff (a “skills gap”). These businesses said this was due to a lack of training, often caused by a lack of budget for training.
- 8% of businesses said they had apprentice(s) currently, this is lower than the SEMLEP-wide figure of 13% but in line with the 6% seen in 2015. A further 37% would consider taking on an apprentice in future; similar to the figure seen in 2015.
- More than four-in-ten businesses (44%) had offered work experience, most commonly to school or college students. Most businesses who did not offer work experience attributed this to a lack of time or a lack of opportunity.

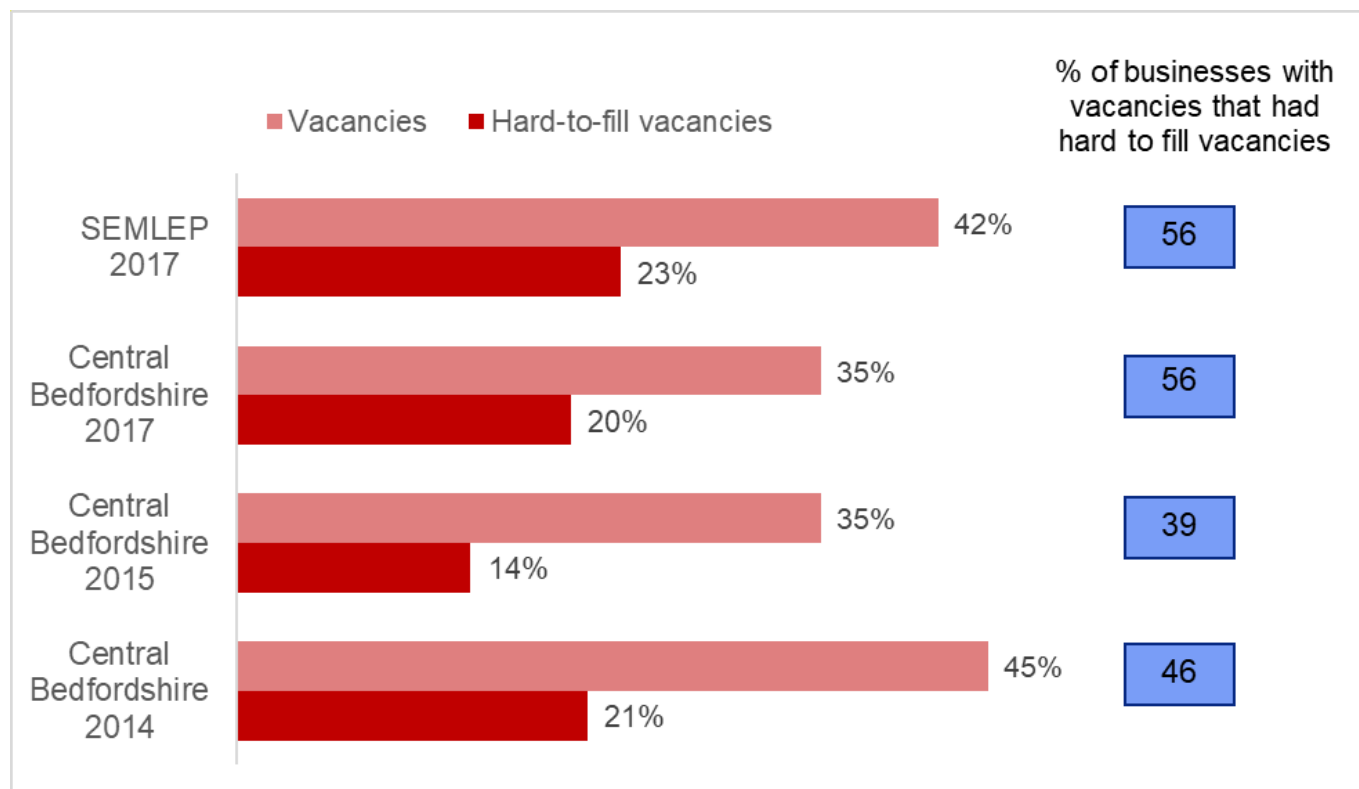
Introduction

- 5.1. This section presents findings relating to recruitment, skills shortages in the labour market and existing workforce and the actions taken by businesses to increase skills. It also looks at the provision of apprenticeships and the provision of work experience placements.

Vacancies and recruitment difficulties

- 5.2. Just over a third (35%) of businesses reported having had at least one vacancy in the 12 months preceding the survey. This is lower than the SEMLEP area average (42%) but comparable to the figure seen in 2015 (also 35%).
- 5.3. Vacancies are unsurprisingly more common among businesses with larger workforces, ranging from around a quarter of businesses with 1-4 staff, to almost all businesses with over 50 staff.
- 5.4. Over half of businesses that had vacancies (56%) reported that they had found at least one of these vacancies hard to fill. This is an increase on the levels seen in Central Bedfordshire in 2015 (39%), but is the same as seen across SEMLEP as a whole (56%). This 56% equates to 20% of all businesses.
- 5.5. Rural businesses with vacancies were more likely to have hard to fill vacancies – 76% compared with 41% of urban businesses with vacancies.

Figure 5.1: Businesses with vacancies and hard-to-fill vacancies in the past year

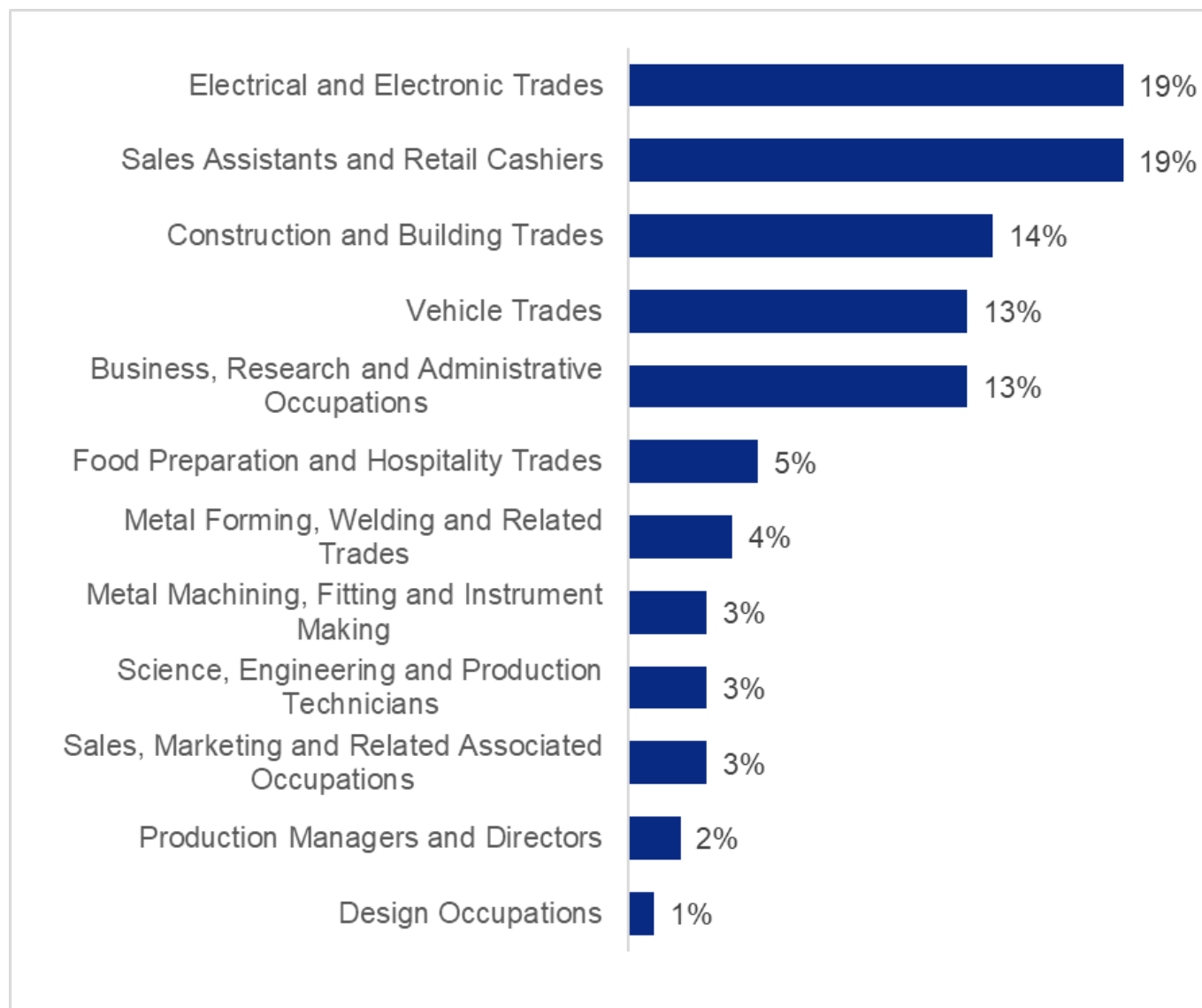


Number of respondents: SEMLEP 2017 2,370; CBC 2017 252, 2015 255, 2014 261.

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

- 5.6. A list of occupations businesses had trouble filling vacancies for is shown in Figure 5.2. Electrical and electronic trades, and sales assistants and retail cashiers were most commonly mentioned, with construction and building trades, vehicle trades and business, research and administrative occupations close behind. It is noteworthy that many of these are skilled trades; as we have seen in previous sections the availability of such skilled labour is a high priority for businesses in the area, with many listing it as a key constraint on their business growth.

Figure 5.2: Occupations businesses have had trouble recruiting



Number of respondents: 47. Please note that small sample size means that data should be treated with caution.
Question asked: Can you please tell me the job titles or functions you have found hard to fill?

- 5.7. Employers were asked the reasons they believed they had found vacancies hard to fill. These focused around a lack of suitable applicants, whether that was a low number with the required skills (76%), with the required attitude (6%) or just a low number generally (14%).

Skills shortages

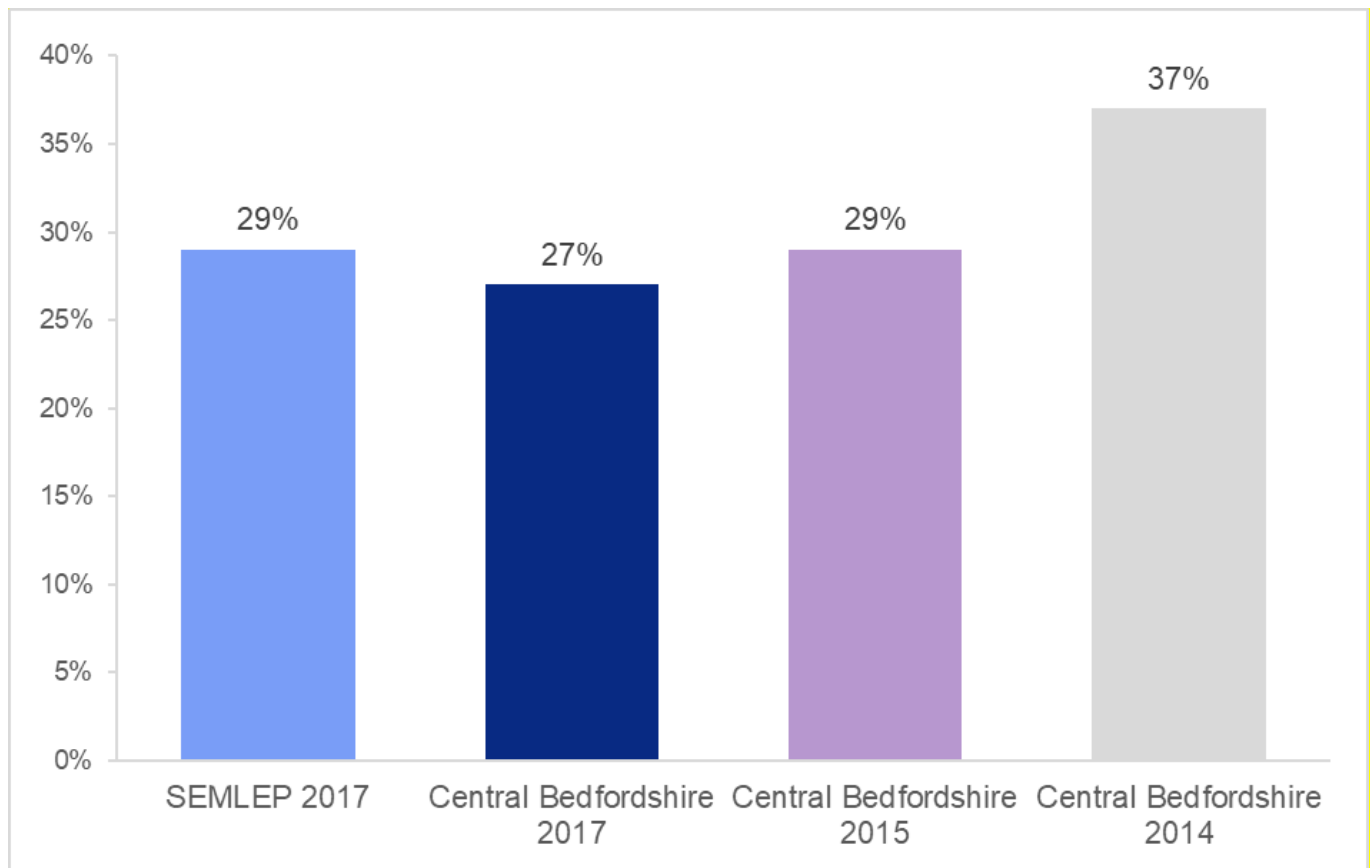
- 5.8. Just over half of businesses with vacancies (53%) reported difficulties finding one or more skills among applicants, similar to levels seen in 2015 (47%) and across the SEMLEP area (also 53%).
- 5.9. Employers most commonly reported job-specific skills (29%) and technical and practical skills (27%) as those they have most trouble finding in applicants for roles. Sales and marketing skills were also mentioned by 6%, which relates to the difficulties mentioned previously in filling sales assistant roles. General employability was an issue for 8%.
- 5.10. Employers said they believe the main reason they have found these skills difficult to obtain is the low quantity (42%) and quality (33%) of the applicants they receive for the job. A

handful blamed it on a lack of skills in the available workforce (8%) or a lack of work ready school leavers (3%).

Skills gaps in existing workforce

- 5.11. Skills gaps are where current staff do not have the requisite skills to carry out their job role. Employers were asked whether they had any skills gaps in their existing workforce, and in which areas.
- 5.12. Overall, 27% of business listed at least one skill they felt their staff were lacking. This is in line with the figure seen in 2015 (29%), and across SEMLEP as a whole (also 29%).

Figure 5.3: Incidence of skills gaps



Number of respondents: SEMLEP 2017 2,347, CBC 2017 252, CBC 2015 255, CBC 2014 261.

Question asked: Do you have skills gaps in your existing workforce in any of the following areas?

- 5.13. The skills businesses felt staff lacked were diverse, and most commonly quite specific to the role they were doing with job specific skills and technical and practical skills scoring highest (6% and 5% respectively). Other skills mentioned by 2% or more were Sales and Marketing (5%) and Managerial Skills (2%).
- 5.14. The main reason given for having skills gaps was that businesses did not have the budget to provide appropriate training (22%); 17% cited a lack of training for other reasons.

Qualifications

5.15. A fifth of staff were judged by employers to have no qualifications, and a quarter were judged to have degrees or higher:

- No qualifications: 21%
- Level 1 qualifications: 10%
- Level 2 qualifications (GCSE A*-C): 22%
- Level 3 qualifications (A Level A-E): 24%
- Level 4 qualifications (HNC): 9%
- Level 5 qualifications (HND, Foundation Degree): 12%
- Level 6 qualifications (Degree): 21%
- Level 7 qualifications (Masters): 4%

Increasing skills

5.16. Overall approaching half of businesses (47%) had taken action to increase the skills of their workforce; this was higher than the SEMLEP average (32%). Larger businesses were more likely to be taking action to improve skills than smaller businesses.

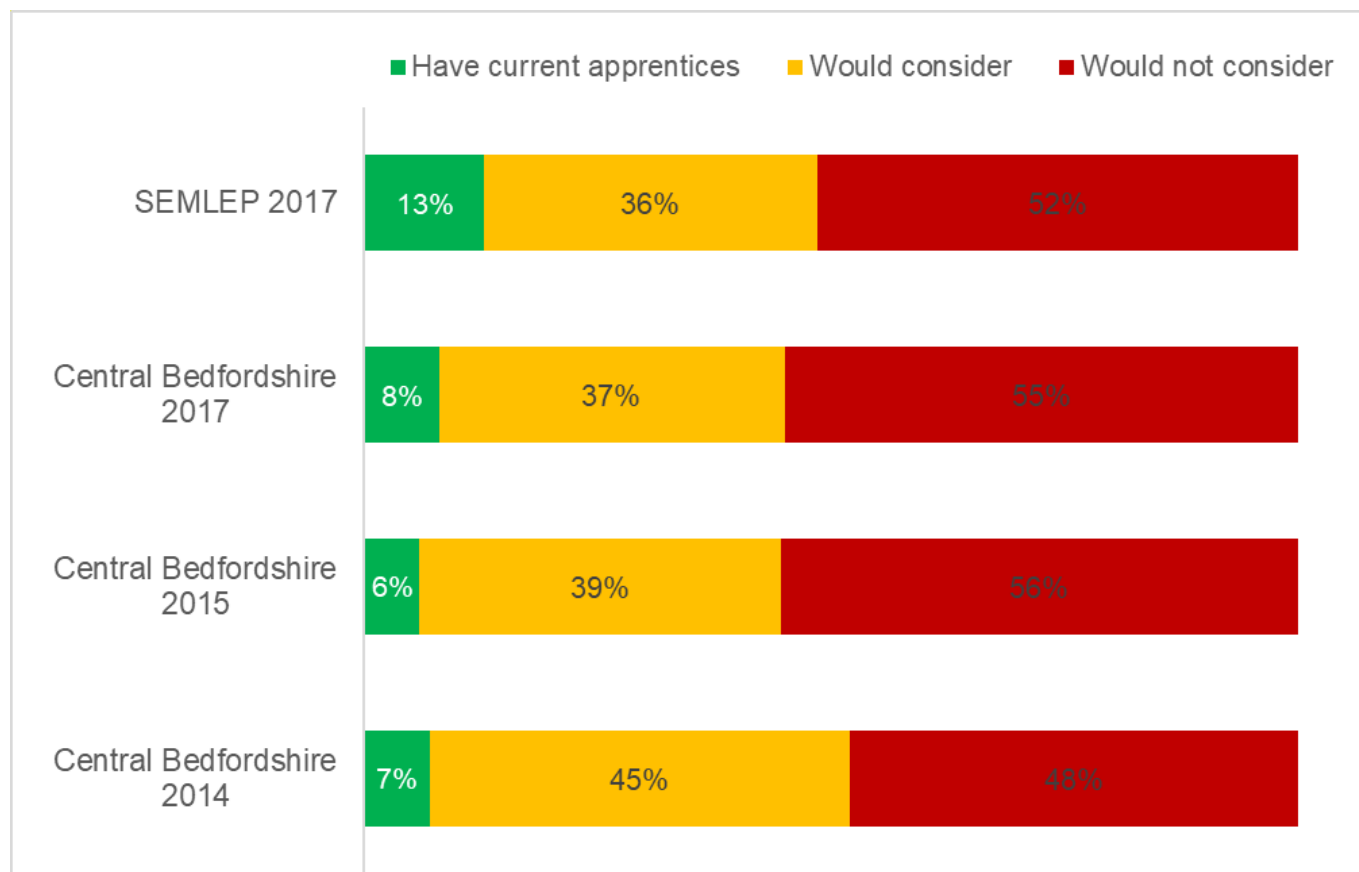
5.17. The primary action taken by businesses to increase the skills of their workforce was the provision of training, either in-house (39%) or outsourced to an external provider (24%). A handful of businesses had invested in apprenticeships specifically to raise skill levels (4%).

Apprenticeships

5.18. Overall, 8% of businesses had a current apprentice (on a recognised government apprenticeship scheme) at the time of the survey. This was similar to the 6% seen in 2015, but lower than seen across SEMLEP as a whole (13%). Larger employers were more likely to have current apprentices than smaller employers – 23% for businesses with 50+ staff, compared with 8% of other businesses.

5.19. A further 37% of businesses in Central Bedfordshire said they would consider taking on an apprentice, leaving 55% who would not consider employing apprentices. This is similar to figures from 2015; the high number who would consider an apprentice last time has not translated into an increase in the take-up of apprenticeships by businesses.

Figure 5.4: Current and potential future apprenticeship offering



Number of respondents: SEMLEP 2017 2,370, CBC 2017 252, CBC 2015 255, CBC 2014 261.

Questions asked: Do you employ anyone on an apprenticeship programme currently? Would you consider taking on an apprentice?

5.20. Reasons businesses would not consider hiring an apprentice were primarily related to business requirements with 59% citing a lack of business need. However, 14% report having a poor previous experience of apprenticeships. A handful thought their business was too small for an apprentice (4%), 3% blamed an overly complex process or the type of work they do being unsuitable for apprenticeships, and 2% blamed the cost or difficulties finding a suitable candidate.

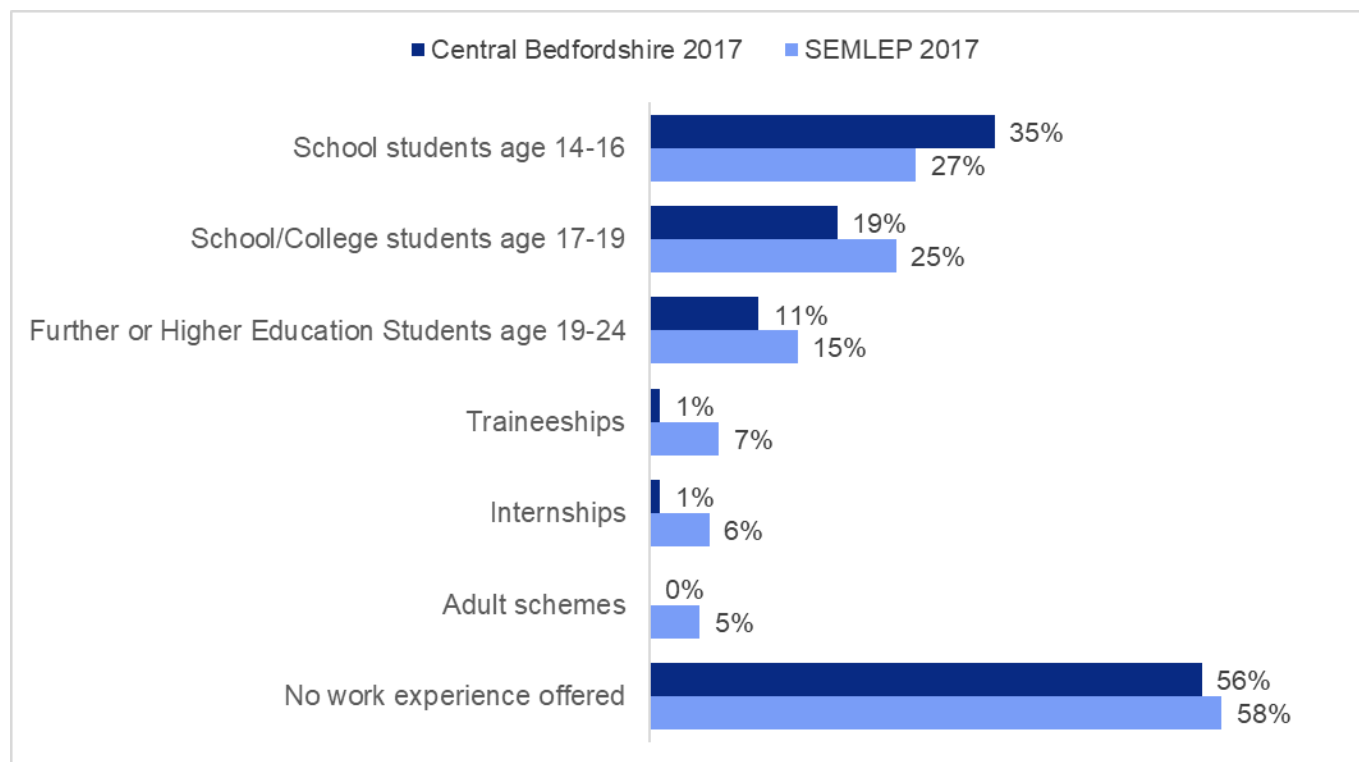
Work experience placements

5.21. Overall, 44% of businesses reported that they offer at least one type of placement. This was similar to the SEMLEP area average (42%).

5.22. These places were most commonly offered to young people in education; over a third (35%) offered placements to 14-16 year olds from school, 19% to 17-19 year old school or college students and a slightly smaller proportion (11%) offered placements to Further or Higher Education students aged 19-24.

5.23. There were also a small number of businesses offering experience placements aimed at those who have left education, such as Traineeships (1%) and internships (1%).

Figure 5.5: Work experience placements offered



Number of respondents: SEMLEP 2,333, CBC 250.

Question asked: Which groups, or in what ways, do you offer work experience?

5.24. Businesses who did not offer work experience most commonly attributed this to a lack of time (25%). One-in-nine (11%) said it was due to a lack of opportunities, suggesting if they were approached they may be open to it. A handful (7%) said they do not see the value of placements, and 10% said the work they do is too dangerous, and unsuitable for a work experience placement.

Section 6: Innovation

Key Findings:

- 20% reported that they had introduced new products, services, patents or processes in the previous 12 months, and a similar figure expect to do so in the coming 12 months (22%). This is lower than innovation levels seen in previous years, and lower than the SEMLEP average.
- The main barrier to innovation was that it simply is not a priority for the majority of businesses. Aside from this, barriers are primarily financial, with the excessive perceived economic risks seen to be too great, along with the costs and availability of finance.
- 10% of businesses had links with colleges or universities for research and development purposes, similar to levels seen in 2015 and across SEMLEP as a whole.

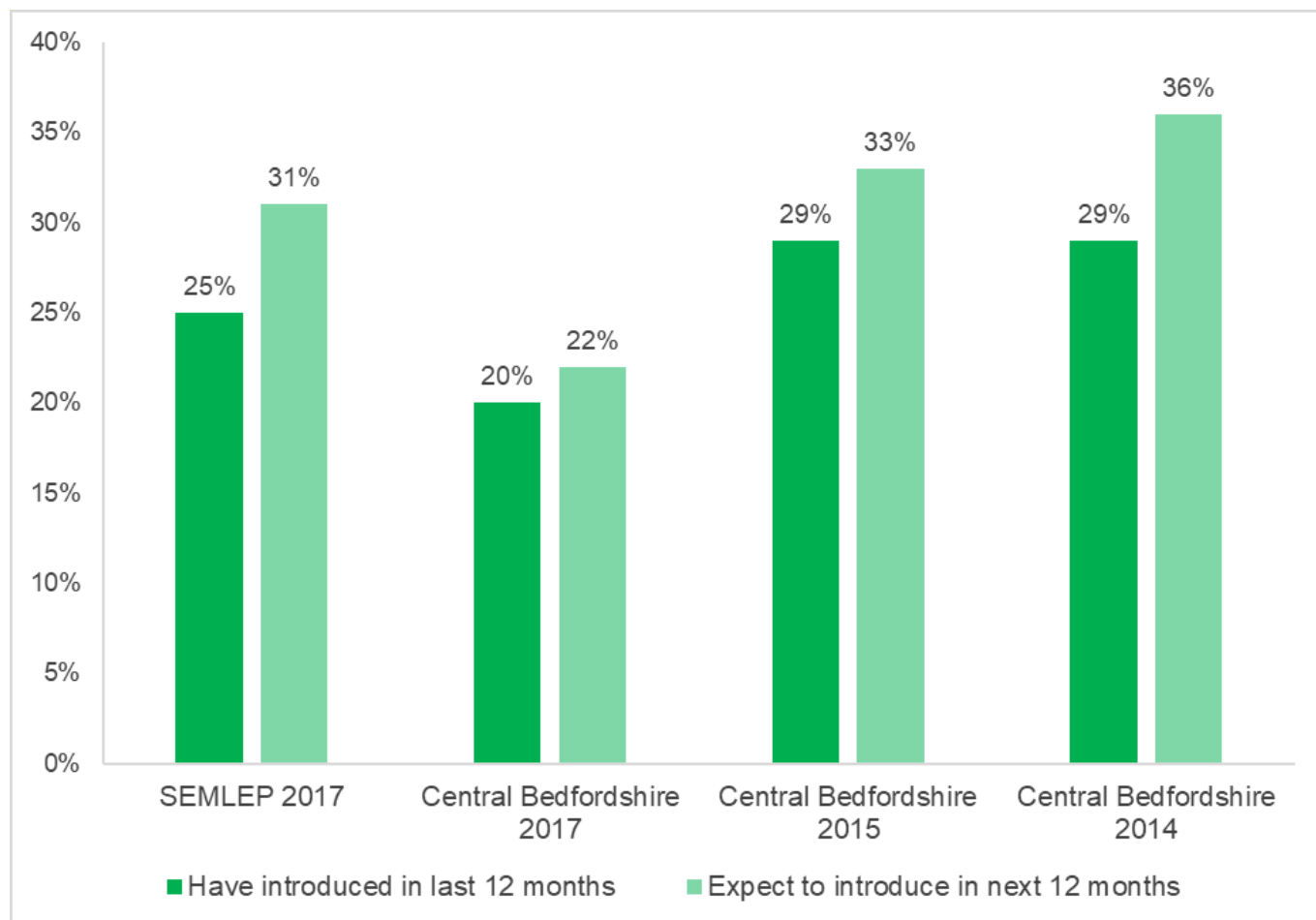
Introduction

- 6.1. This chapter looks at the level of innovation among Central Bedfordshire businesses in the past 12 months, and expected innovation over the next 12 months. It also looks at links businesses have with universities and colleges for innovation purposes.

Innovation

- 6.2. Overall 20% of businesses said they had introduced any new products, services, patents or processes in the 12 months preceding the survey. This is lower than it was in 2015 (29%), and although the SEMLEP region as a whole has seen a reduction in innovation activity, this 2017 figure is also lower than the SEMLEP average of 25%.
- 6.3. Similarly, 22% of businesses expect to introduce new products, services, patents or processes in the next 12 months, which is a drop on the numbers seen in previous years and lower than the proportion seen across SEMLEP as a whole (31%).

Figure 6.1: Innovation in the past 12 months and expectations for next 12 months

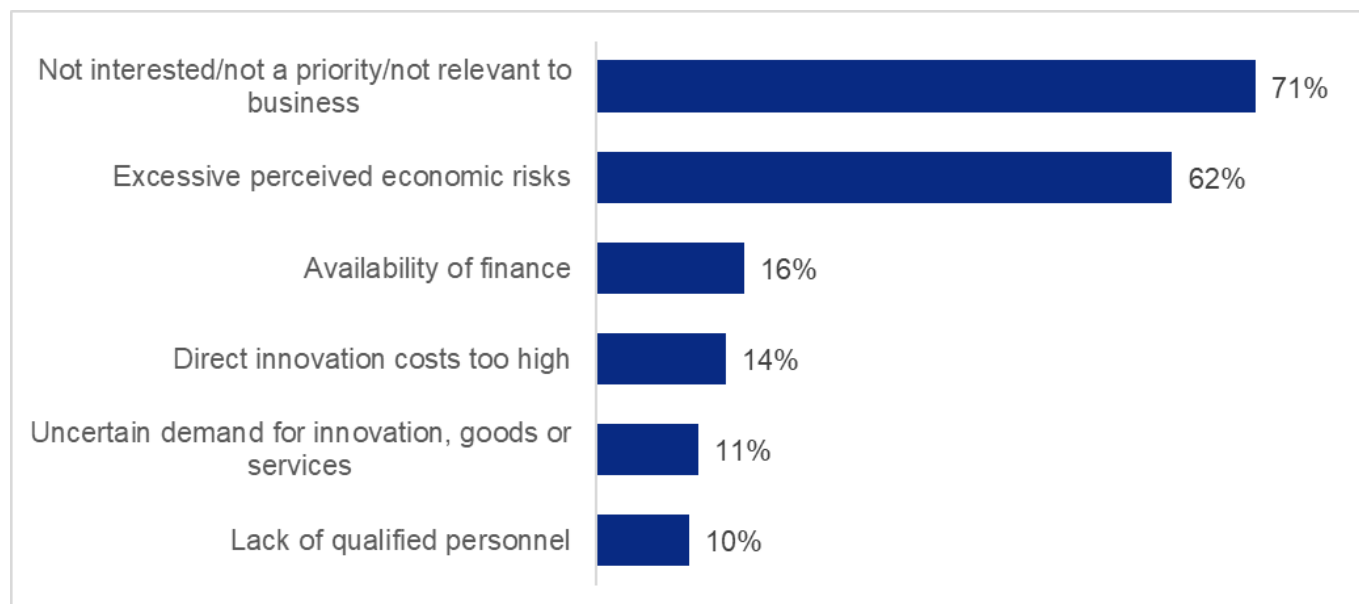


Number of respondents: SEMLEP 2017 2,359; CBC 2017 252, 2015 255, 2014 261. Excludes don't know responses.

Questions asked: Has your business introduced any new products, services, patents or processes in the past 12 months? And do you expect to introduce any new products, services, patents or processes in the next 12 months?

- 6.4. Of those not innovating, 71% said it was not something they were even thinking about, either because they had other priorities or they did not consider it relevant to their business. The excessive perceived economic risk was also a major barrier, mentioned by approaching two-thirds (62%) of non-innovators; related to this 11% said they were uncertain of the demand for innovation, goods and services.
- 6.5. Financial factors were also cited in terms of the availability of finance and the direct costs of innovation.
- 6.6. Skills also came up as a barrier, with 10% saying they had a lack of qualified personnel.

Figure 6.2: Barriers to innovation



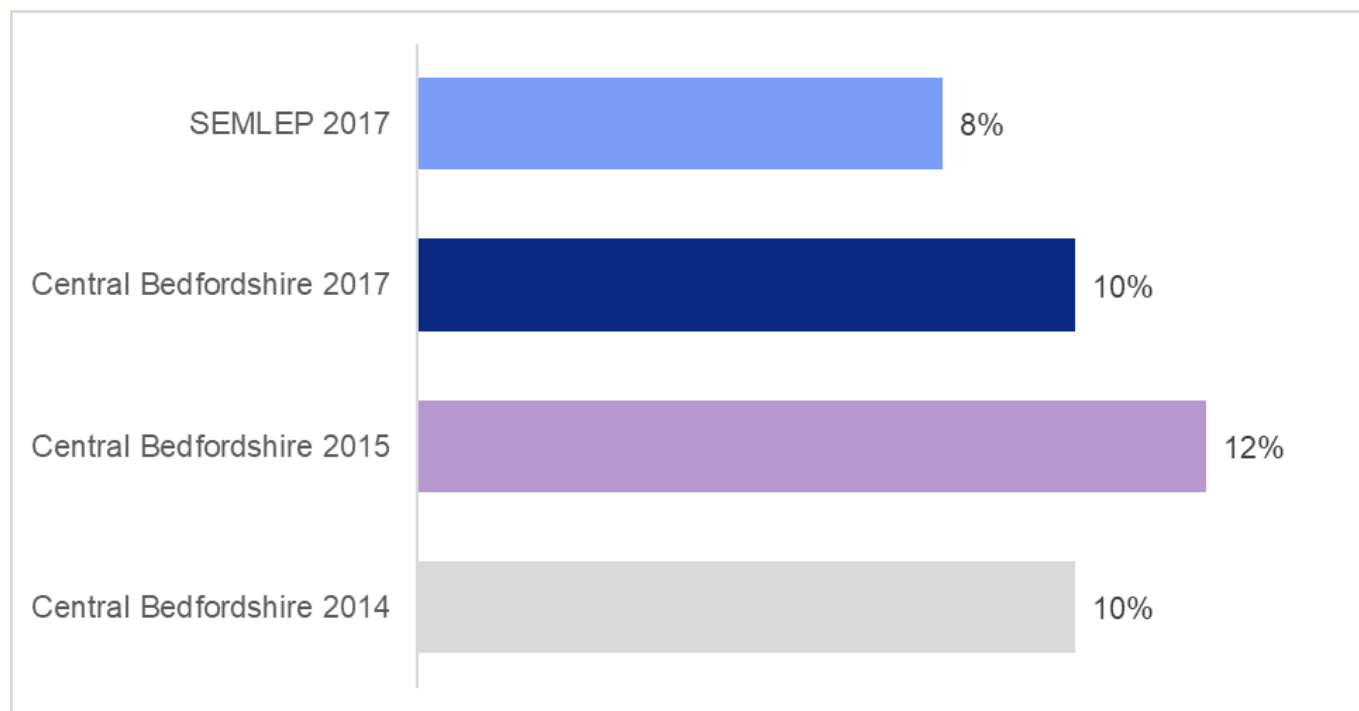
Number of respondents: 174. Only asked to non-innovators.

Question asked: Does your business consider that any of the following are potential barriers to innovation?

Links with universities and colleges

- 6.7. The research and development needed to introduce new products and services is a key part of the innovation process. One route to this is to link with universities and colleges.
- 6.8. Overall, 10% of businesses in Central Bedfordshire had links with universities or colleges for research and development purposes. This is similar to the 12% seen in 2015 and the SEMLEP region as a whole (8%).

Figure 6.3: Links with universities and colleges for research and development purposes



Number of respondents: SEMLEP 2017 2,344; CBC 2017, CBC 250, CBC 2015 255, CBC 2014 261. Excludes don't know responses. Question asked: Does your business have any links with universities or colleges for research and development purposes?

Section 7: Regulation

Key Findings:

- Almost two-thirds (64%) of businesses believe effective regulation supports their business operations, an increase on the 50% seen in 2015.
- Of those who did not feel supported by regulation, the vast majority (94%) said this was because there was too much regulation. 12% said they found regulation difficult to understand.

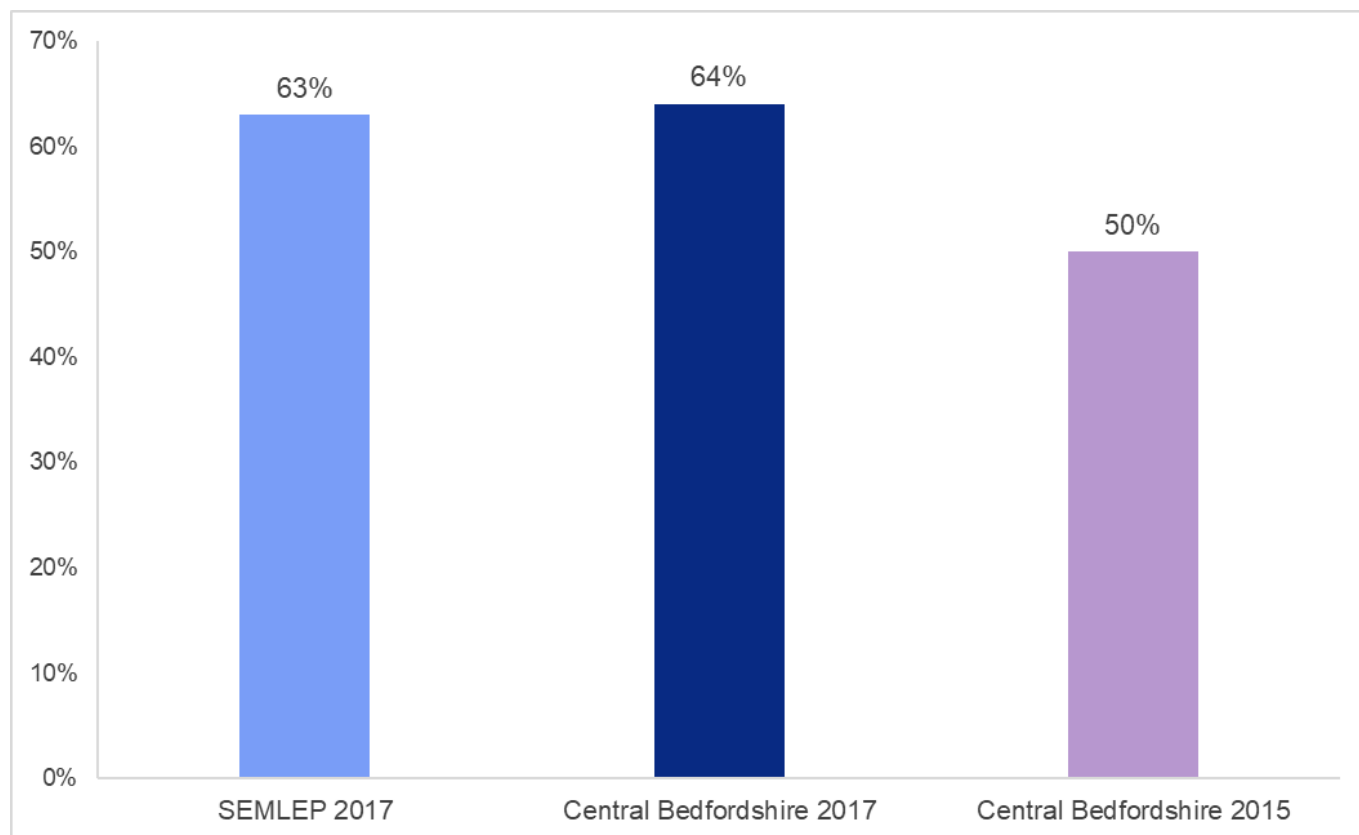
Introduction

7.1. This chapter explores whether businesses believe the regulations in place support their business operations, and if not what they feel the key issues are around regulation.

Extent to which regulation supports business operations

7.2. Almost two-thirds (64%) of businesses believe that, on the whole, regulation supports their business operations. This was higher than levels seen in 2015 (50%), but in line with SEMLEP as a whole (63%).

Figure 7.1: The proportion of businesses who believe regulation supports their business operations



Number of respondents: SEMLEP 2017 1,995, CBC 2017 192, CBC 2015 255. Excludes don't know responses.

Question asked: Do you believe effective regulation supports your business operations?

- 7.3. This leaves over a third of businesses (36%) who did not believe that regulation supports their business operations. By far the most common reason for thinking this was that they believe there is too much regulation that they must adhere to, mentioned by nearly all of these businesses (94%). The second most common reason was that regulation is too difficult to understand (12%), and a handful of businesses stated that they find there is a lack of access to regulation (2%). Although the figures are slightly different, the top cited reasons are the same as in 2015.
- 7.4. Of the (very) few businesses who believed regulation was actively constraining business growth, Environmental Health and the Health and Safety Executive were the only two specific regulators mentioned as causing a particular issue.

Section 8: SEMLEP

Key Findings:

- A fifth of businesses in Central Bedfordshire were aware of SEMLEP – higher than the level seen across SEMLEP as a whole.
- Awareness of SEMLEP in Central Bedfordshire has remained constant since the last survey in 2015, despite awareness across SEMLEP as a whole decreasing.
- This looks to be due, at least in part, to a higher number of businesses saying their awareness of SEMLEP comes from communications from the local authority, suggesting Central Bedfordshire is doing more to spread the word about SEMLEP than others (or that they are doing it more effectively).
- However, this does not appear to have led to a greater awareness or understanding of the sort of support SEMLEP can offer, with 40% of businesses saying they don't know what SEMLEP should focus on to be of most use to them. Of those that could give an answer, businesses felt the main strategic focus of SEMLEP should be in offering business support.

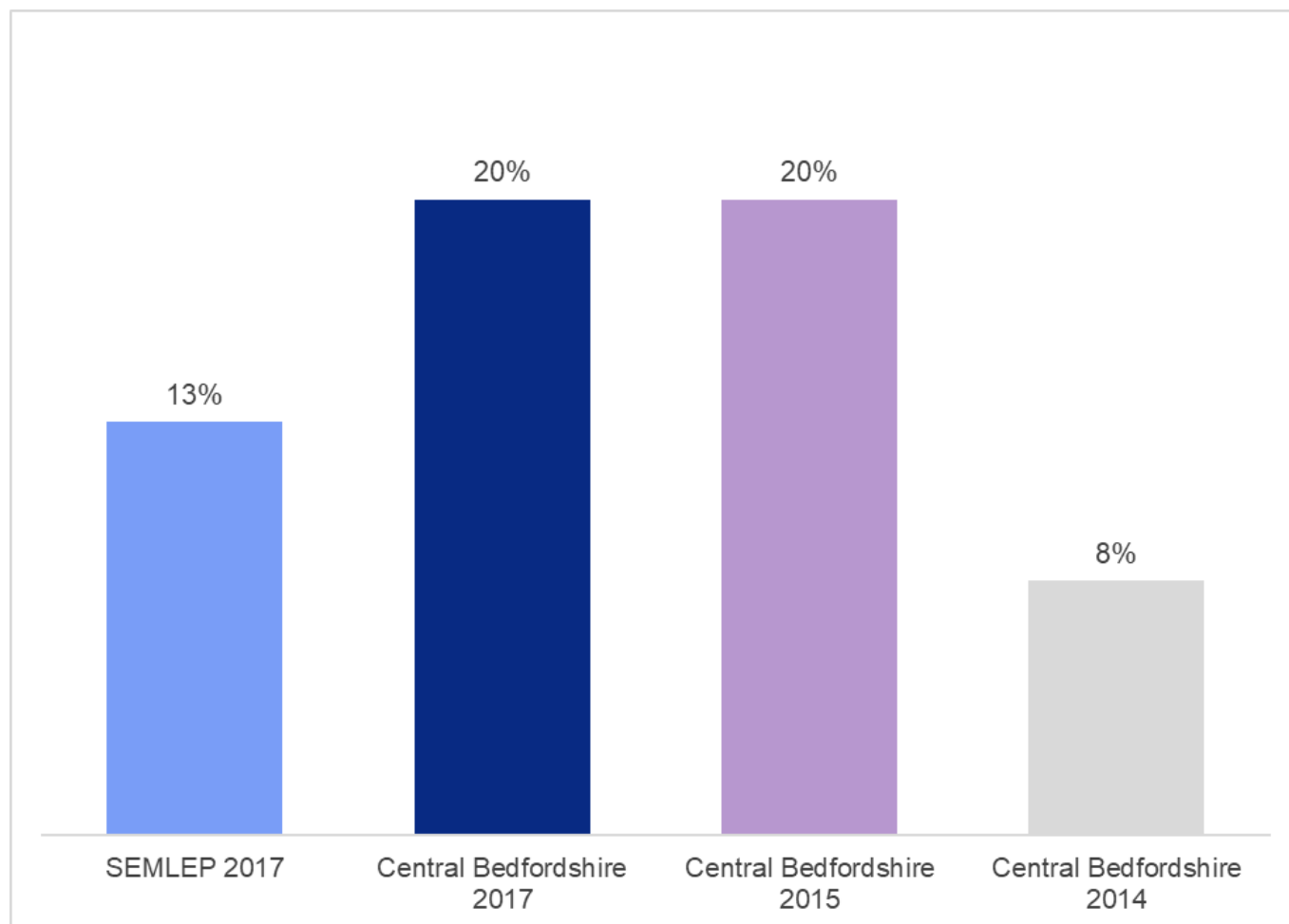
Introduction

- 8.1. This section presents analysis of businesses' awareness of SEMLEP and how it should help the local economy grow.

Awareness of SEMLEP

- 8.2. Overall, 20% of businesses said they had heard of SEMLEP prior to the survey. This is consistent with the number seen in 2015, which was an increase on 2014 levels.
- 8.3. The proportion of businesses in Central Bedfordshire that were aware of SEMLEP was higher than seen in SEMLEP as a whole, where levels had decreased from 25% in 2015 to 13% in 2017. There has been no such decrease in the levels of awareness in Central Bedfordshire.

Figure 8.1: Awareness of SEMLEP over time



Number of respondents: SEMLEP 2017 2,299, CBC 2017 225, CBC 2015 255, CBC 2014 261.

Question asked: Before today, had you heard of SEMLEP (South East Midlands Local Enterprise Partnership)?

- 8.4. Businesses aware of SEMLEP had most commonly heard of them through communications from their Local Authority (50%). This was higher than for SEMLEP overall (28%) and may go some way to explaining why levels of awareness in Central Bedfordshire were higher than elsewhere. A fifth (22%) had heard of them via direct communications from SEMLEP. None said they had heard of SEMLEP via the press, which in the past has been the main source of awareness.

Strategic focus of SEMLEP

- 8.5. Businesses believe that the strategic focus of SEMLEP should primarily be on business support (35%). This is an increase since 2015, when business support was mentioned by 17%.
- 8.6. Other areas of focus, include lobbying Central Government to the benefit of local businesses and the local economy (12%), securing funding to support new investment (8%), helping to ensure an appropriate supply of skilled labour (8%) and delivering infrastructure improvements (4%).
- 8.7. Over a third of businesses (40%) said they did not know what SEMLEP's priorities should be, which is likely to be because they were either unaware of SEMLEP and/or did not understand their role. This was far higher than across SEMLEP as a whole, suggesting the higher awareness of SEMLEP in the area has not led to a greater understanding of what they can do or how they can help local business.

Section 9: Business Profile and Working Practices

Key Findings:

- Nearly all of the businesses in the survey were private sector businesses; fewer than 1% classified themselves as a social enterprise. Almost half of businesses were private limited companies (46%) and four-in-ten sole traders (39%).
- Over a third of businesses with employees are women-led, 9% ethnic minority-led and 5% disabled-led (i.e. 50% or more of the estimated partners or board directors are from these groups).
- In terms of the working practices offered to staff, seven-in-ten offered at least one of part time working, flexible working or that they had proactive policies in place to recruit from protected groups. However, 31% of businesses had none of these policies in place.

Introduction

- 9.1. This chapter outlines the profile of businesses operating in the Central Bedfordshire area who completed the survey. This includes the legal status profile of businesses, and the profile of business ownership and leadership in the region.
- 9.2. It also covers business culture as defined by their working practices, such as access to flexible working.
- 9.3. Where the survey profile has been designed to match statistics from the Office of National Statistics (size and sector) the figures are not repeated here.

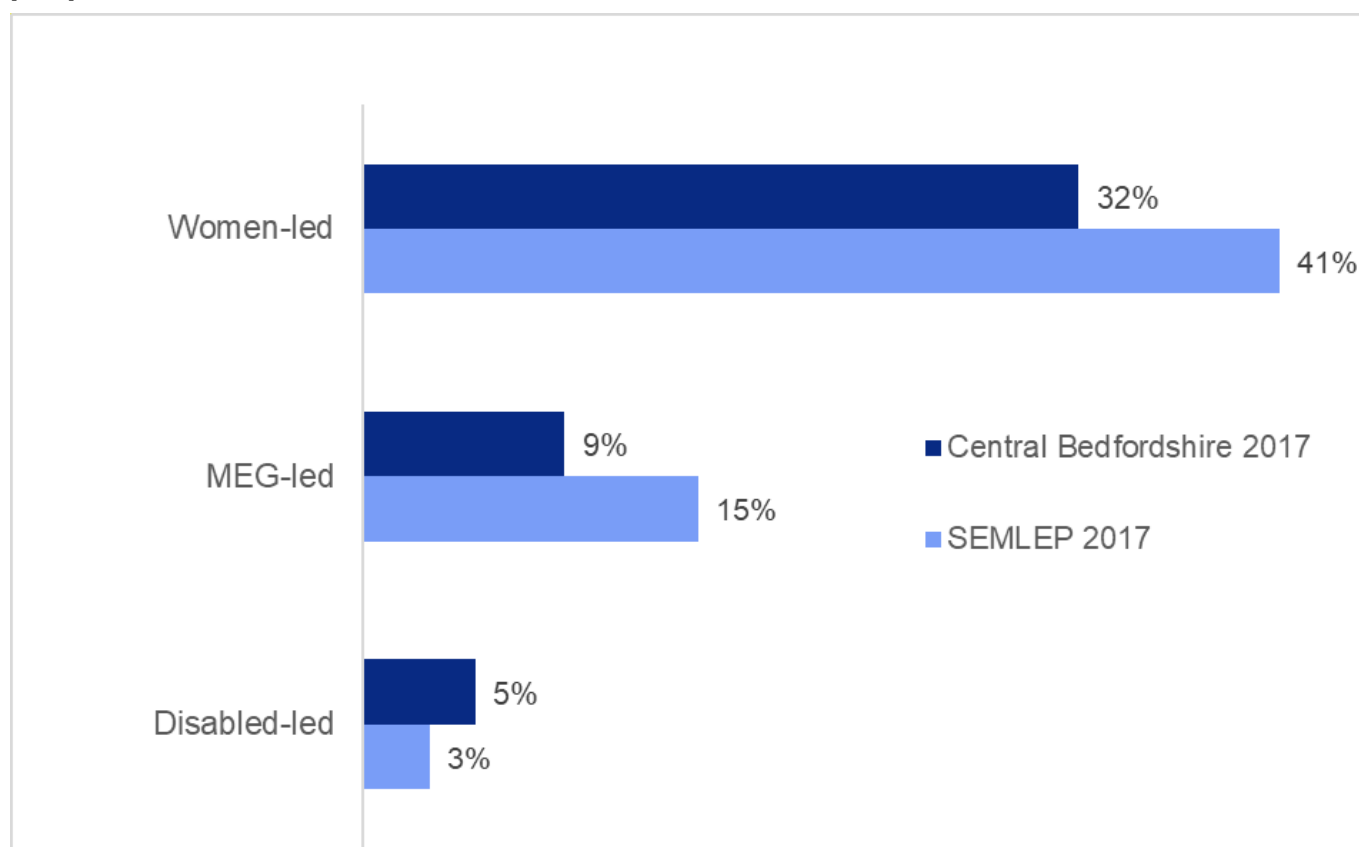
Legal status

- 9.4. Nearly all businesses interviewed in Central Bedfordshire were private sector businesses – less than 1% classified themselves as a social enterprise.
- 9.5. Of these, around half (46%) were private limited companies and four-in-ten (39%) sole traders. 14% were partnerships and 1% public limited companies.

Business ownership and leadership

- 9.6. 62% of sole traders in the sample were men, and 38% women. Six-in-ten sole traders were from ethnic minority backgrounds – higher than the SEMLEP average of 35%. A quarter (24%) said they have a disability, again higher than the SEMLEP average of 15%.
- 9.7. 32% of Central Bedfordshire businesses with employees are women-led (slightly less than the 40% across SEMLEP), 9% are ethnic minority-led (15% SEMLEP) and 5% disabled-led (3% SEMLEP)

Figure 9.1: Proportion of businesses led by women, minority ethnic groups and disabled people



Number of respondents: SEMLEP 1,673; CBC 2017 150 (not asked to sole traders).

Question asked: For each of the following, please estimate the percentage of partners or board directors in your business that are . . .?

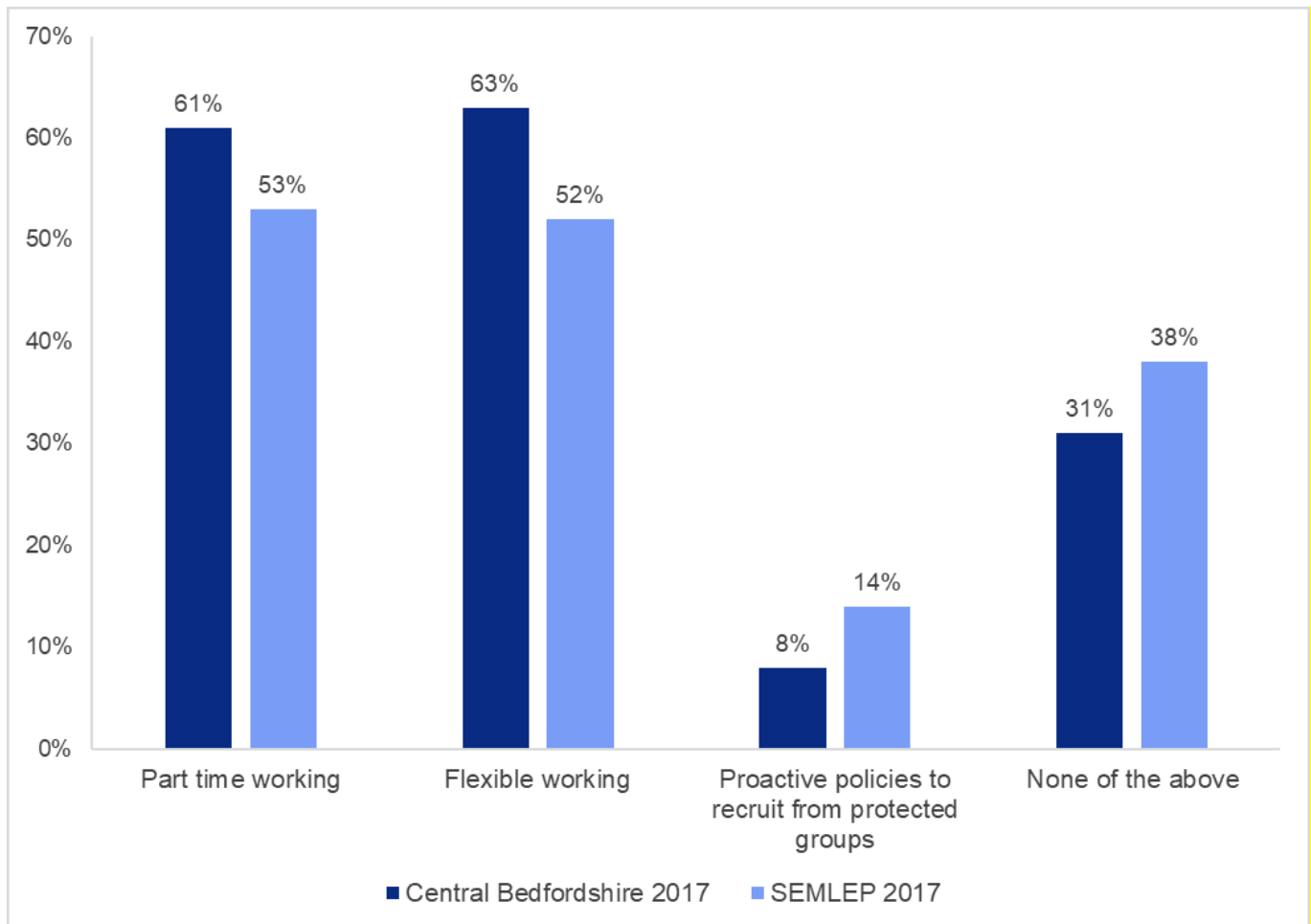
Working practices

- 9.8. Offering practices such as part-time working and flexible working to employees, and having policies to proactively boost recruitment from protected groups, is considered to be good practice for businesses and indeed has been linked to higher levels of business performance⁵.
- 9.9. Approaching two-thirds of businesses reported that they offer flexible working to staff (63%) or part time working (61%). This is higher than the proportions seen across SEMLEP as a whole (52% and 53% respectively). However, fewer have proactive policies in place to recruit from protected groups (8%, compared to 14% across SEMLEP).
- 9.10. Overall 31% of businesses had none of these policies in place.
- 9.11. Larger businesses were more likely to offer the policies than smaller businesses. For example, 60% of businesses with 1-4 staff offered flexible working, compared with 91% of larger businesses. This is not surprising as with more staff they are more likely to have faced instances of staff requesting part time or flexible working, they are more likely to have a dedicated HR function with the resource to implement such policies, and they have more

⁵ Tamkin, P (2004) "High Performance Working Practices" Institute for Employment Studies www.employment-studies.co.uk/system/files/resources/files/mp36.pdf (accessed 21/08/17).

staff to minimise the impact of irregular working patterns on their day to day business activities.

Figure 9.2: Working practices of businesses



Number of respondents: SEMLEP 2,201; CBC 190. Excludes don't know responses.

Question asked: Does your business offer any of the following working practices?

Scale-up Businesses

- 9.12. A “scale-up business” is one that has been identified as having potential for expansion through a number of characteristics of the business. A scale-up business is defined as one that has at least 10 employees, has been operating at least 3 years, achieved a turnover of £500,000 or more in the previous year and has the potential or aspiration to grow turnover and/or profit by 20% or more per year in the next 3 years.
- 9.13. A “pre-scale-up business” has at least 5 employees, achieved a turnover of £250,000 or more in the previous year, and have the potential or aspiration to grow turnover and/or profit by 50% or more per year in the next 3 years.
- 9.14. 8% of businesses fell into one or the other of these definitions: 5% considered they met all the criteria for a scale-up business (compared to 8% across SEMLEP), and 3% for a pre-scale up business (SEMLEP = 5%).

Appendix: Marked-up questionnaire

SEMLEP Business Survey 2017

Q0a1 Before we start, could I just take your name and job function:
Name:

Job function:

Q0b1 Note to interviewer: Record Local Authority area from database (this is essential information to ensure that the correct questions are asked to each respondent):

0% Aylesbury Vale
0% Bedford
100% Central Bedfordshire
0% Cherwell
0% Corby
0% Daventry
0% East Northamptonshire
0% Kettering
0% Luton
0% Milton Keynes
0% Northampton
0% South Northamptonshire
0% Wellingborough

Section A: Business details

Read out: I would like to begin by asking you some general questions about this business or site. By site I mean this single location, even if it encompasses more than one building.

Q1 Ask all: Are you . . . ? Note to interviewer: Read out. Single Code.

A private business - CONTINUE
100%
0% A social enterprise organisation – CONTINUE
0% A voluntary or public sector organisation – THANK AND CLOSE (Thank you but we need to gather the views of businesses in the private sector or social enterprises)

Q2 Ask all: Including you and any working proprietors/owners, how many people are on the payroll at this location?

Note to interviewer: Single code.

77% 1 to 4
12% 5 to 9
5% 10 to 24
3% 25 to 49
2% 50 to 99
1% 100 to 249

- 1% 250 plus
- 0% Don't know/refused – Note to interviewer: take from database

Q3 Ask all: I have [SIC 2007 description from database] as a general classification for your business. Does this sound about right? Note to interviewer: Single code.

- 100% Yes
- 0% No

If 'No' to Q3, please continue, otherwise please go to Q5 - this is automated on-line

Q4 What is the main business activity at this site?
PROBE FOR DETAIL
 IF NECESSARY: What is the main product or service of this business? What exactly is made or done at this site? What material or machinery does that involved using?
WRITE IN:

Q5 Ask all: How would you describe your company status? Note to interviewer: Read out. Single code.

- 39% Sole Trader
- 14% Partnership
- 46% Private Limited Company (LTD) (by guarantee)
- 1% Public Limited Company (PLC) (by shares)
- 0% Franchise
- 0% Social Enterprise
- 0% Community Interest Company Limited by Guarantee (CIC)
- 0% Community Interest Company Limited by Shares (CIC)
- 0% Charitable Incorporated Organisation (CIO)
- 0% Co-operative Models: IPS – Industrial Provident Society; Bencom – Employee owned
- 0% Other
- 0% Don't know

If 'Other', please specify:

If business has five or more employees, please continue. Otherwise go to Q7 - this is automated on-line.

Q6 Which of the following descriptions apply to your business? Note to interviewer: **READ OUT. SINGLE CODE.**

- 21% You have at least 10 employees; you have been operating for at least 3 years; you achieved a turnover of £500,000 or more in the last year; you have the potential and aspiration to grow turnover and/or profit by 20% or more per year over the next 3 years. (i.e. scale-up business – do not read this out)
- 12% You have at least 5 employees; you achieved a turnover of £250,000 or more in the last year; you have the potential and aspiration to grow turnover and/or profit by 50% or more per year over the next 3 years. (i.e. pre-scale-up business – do not read this out)
- 67% Neither of the above

- Q6a Ask to Northampton only (N1): Do you currently have any problems with your broadband speed at this site? Note to interviewer: Select one answer only.
- 0% Yes
 - 0% No
 - 0% We do not have access to broadband at this site
 - 0% Don't know

Section B: Quality of Local Area

- Q7 Ask all: Overall, how do you rate your location as a place to do business? Please indicate by using a scale of 1 - 5, where 1 is very poor and 5 is very good. Note to interviewer: SINGLE CODE ONLY.

- 3% 1 -Very poor
- 3% 2
- 25% 3
- 33% 4
- 26% 5 - Very good
- 10% Don't know

- Q8 Ask all: How do you rate the availability of, or quality of, the following aspects of your location from a business perspective? Could you please indicate by using a scale of 1 - 5, where 1 is very poor and 5 is very good.

Note to interviewer: READ OUT EACH ASPECT. SINGLE CODE PER ASPECT.

	1 - Very poor	2	3	4	5 - Very good
Supply Chain located locally	4%	6%	21%	46%	23%
Skilled Staff	12%	18%	14%	35%	21%
Locally available workforce	8%	16%	28%	31%	17%
Local support available to businesses	15%	6%	39%	34%	7%
Average pay scales / wage levels	11%	6%	30%	43%	10%
Availability of suitable premises	6%	14%	21%	23%	36%
Good value rent and rates	7%	12%	26%	34%	20%
Affordable housing	10%	30%	15%	31%	14%
Good quality Schools/Colleges	4%	5%	21%	46%	23%
Proximity to Universities	1%	12%	27%	44%	15%
Attractive surroundings	4%	4%	14%	47%	31%
Availability of local services (such as retail and leisure)	4%	7%	31%	40%	18%
Road network	5%	9%	21%	39%	25%

Rail network	3%	3%	18%	47%	29%
Airport access	1%	3%	14%	42%	40%
Public transport	3%	4%	19%	50%	23%
Walking/cycling routes	0%	7%	18%	55%	21%
Ease of transportation of freight	5%	8%	13%	47%	28%

Q8s Ask for Central Bedfordshire Only (CBC1): On a scale of 1 - 5, where 1 is very poor and 5 is very good. How do you rate the quality of your local town centre? Note to interviewer: Single Code only.

9% 1 -Very poor
17% 2
44% 3
20% 4
6% 5 - Very good
5% Don't know

Q8t Ask for Central Bedfordshire Only (CBC2): In terms of attractive surroundings, what aspects are most important to your business? Note to interviewer: Read out. **SINGLE CODE ONLY.**

34% The attractiveness of Central Bedfordshire in general as a place to live and work
20% The attractiveness of the area immediately around your business premises
40% Both the above
6% None of the above

Section C: Business engagement

Q8u Ask for Central Bedfordshire Only (CBC3): To what extent do you agree or disagree that the Council provides value for money, where 1 is strongly disagree and 5 is strongly agree?

Note to interviewer: **SINGLE CODE ONLY.**

3% Strongly disagree
27% Tend to disagree
43% Neither agree nor disagree
17% Tend to agree
3% Strongly agree
8% Don't know

Q9 Ask all: Have you used any of the following for business advice or support in the past 12 months? Note to interviewer: **READ OUT. SELECT ALL THAT APPLY.**

26% Solicitor
93% Accountant
50% Central Government department or Government body (e.g. HMRC, Job Centre Plus, Department for International Trade, Innovate UK)
2% Government's Business Growth Service
2% Velocity (Growth Hub)

- 0% Northamptonshire Growth Hub
- 9% Your local Council
- 9% Chamber of Commerce
- 12% Bank
- 7% Trade Association
- 1% Family/ Friends
- 12% Other Business Owners
- 0% University / College
- 2% Your Council's Business TimeBank service / IF AYLESBURY VALE CHANGE TO:
Buckinghamshire Business First (BBF)
- 8% Web based business advice
- 9% Recruitment Agency
- 6% Marketing Agency
- 3% National Apprenticeship Service
- 0% Ask to LUTON ONLY: Think Luton website
- 0% Ask to CENTRAL BEDFORDSHIRE ONLY: My Incubator Ventures (MIV)
- 0% Ask to MILTON KEYNES ONLY: Milton Keynes Council/Invest MK
- 0% Other
- 1% None of the above

If "Web based business advice" or "Other", please specify:

Q9a1 Ask If not select 'Velocity' or 'Northamptonshire Growth Hub' in previous question. Had you heard of Velocity/Northamptonshire Growth Hub before today?
IF NECESSARY: Velocity is a free business support programme that has been set up to make it easier for businesses to maximise their growth potential. Note to interviewer: Single Code only.

- 16% Yes
- 84% No
- 0% Don't know

Q9a2 ASK IF CENTRAL BEDFORDSHIRE AND USED ANY BUSINESS ADVICE/SUPPORT AT Q9 (CBC4): Overall, how do you rate the business advice or support you have received in the past 12 months? Please indicate by using a scale of 1 - 5, where 1 is very poor and 5 is very good. Note to interviewer: SINGLE CODE ONLY.

- 12% 1 - Very poor
- 11% 2
- 37% 3
- 26% 4
- 14% 5 - Very good

Q9a3 ASK IF SOUTH NORTHAMPTONSHIRE (SN1): In which of the following ways would you like to engage with the council to receive support and information for your business? Note to interviewer: READ OUT. SELECT ALL THAT APPLY.

- 0% By an individual visit to your company
- 0% Through participating in a business forum
- 0% By receiving and responding to the Council's eBulletin
- 0% Invitation to key Business Events hosted by the Council during the year
- 0% Business Park information
- 0% Finance and Grant information
- 0% Land and Premises

- 0% Business services and regulatory advice
- 0% None of the above

Q9a4 Ask if Cherwell (C1) or Daventry (D1): Would you like help for your business, from your local Council, in any of the following ways? Note to interviewer: READ OUT. SELECT ALL THAT APPLY.

- 0% By an individual visit to your company
- 0% Through participating in a business forum
- 0% By receiving the Council's E-bulletin
- 0% None of the above

Section D: Business Performance

Q10 Ask all: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? Note to interviewer: SINGLE CODE ONLY.

- 50% Improved
- 34% Remained stable
- 17% Deteriorated

Q11 Ask all: Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate? Note to interviewer: SINGLE CODE ONLY.

- 44% Improve
- 53% Remain stable
- 3% Deteriorate

Q12 Ask all: What do you consider to be constraints on your business growth? Note to interviewer: Read Out and SELECT ALL THAT APPLY.

- 30% Lack of skilled labour
- 7% High cost of labour
- 3% Lack of training available locally
- 12% Increasing competition
- 4% Transport infrastructure (road, rail and sea)
- 3% Transport costs e.g. fuel etc
- 2% Access to public transport
- 12% Constraints with premises or location
- 2% Difficulties with obtaining planning permission
- 3% IT infrastructure/lack of high speed Broadband
- 10% Attracting or retaining customers
- 2% Interest rates/cost of finance
- 9% Access to finance
- 12% Cash flow
- 2% High cost of energy
- 7% Over regulation/red tape
- 9% Business rates
- 3% Lack of appropriate business support
- 26% The general economic climate
- 1% Reduction in public sector expenditure
- 42% Other
- 4% None of the above

4% Don't know

If 'Other', please specify:

Q13 Ask all: Overall, what do you think will be the impact on your business, if any, of leaving the European Union? Note to interviewer: SINGLE CODE

- 15% Positive impact
- 38% Negative impact
- 30% No notable impact
- 16% Unsure/don't know

Q14 Ask all: For your business, what do you consider to be the key issues for the negotiations to leave the EU? Note to interviewer: Select all that apply.

- 12% Labour availability
- 8% Skills availability
- 0% EU funding availability
- 2% EU legal directives
- 1% EU conformity mark (product standards)
- 32% Access to the single market
- 1% Access to International non-EU market
- 45% None of the above
- 16% Other

If 'Other', please specify:

Q15 Ask all: What are the 3 most important things your local Council and other support organisations should do to help you grow your business? Note to interviewer: DO NOT READ OUT. PROBE and SELECT UP TO 3 RESPONSES.

- 20% Lower business rates
- 1% Use local businesses for jobs/ employ local people
- 2% More financial support
- 3% More business support/ advice
- 4% Reduce red tape/ paperwork
- 1% Easier planning permission
- 2% Better communication with businesses/ listen more to businesses
- 0% Better/ more / cheaper parking facilities
- 2% Help small businesses
- 0% Help with advertising
- 0% Offer more/ free training
- 5% Regenerate the area/ more investment in the area
- 1% Improve transport infrastructure/ links
- 1% Improve other infrastructure such as broadband
- 0% Encourage new business to start up
- 0% More shops/ local amenities (inc fill empty shops)
- 1% Help with marketing and promotion
- 6% Assist / provide suitable premises
- 1% Help you to engage with training and education providers to identify new talent
- 41% Other
- 12% Nothing
- 17% Don't know

If 'Other', please specify:

Q15a Ask only if S. Northants (SN2): Looking ahead to the next 12 months, which of the following business priorities or issues would you like the Council to support you with?

1 Note to interviewer: Probe and Select all relevant answers.

- 0% Staff recruitment
- 0% Support around recruiting and employing apprentices
- 0% Skills and training
- 0% Access to finance
- 0% Accessing suitable premises
- 0% Business planning support
- 0% Marketing and business development support
- 0% Networking with other businesses
- 0% Exporting
- 0% Other

If 'other', please specify:

Q15b Ask only if Daventry (D2): Daventry District Council is currently reviewing future employment land requirements. What is the ideal size of premises to meet the needs of your business in the next 5-10 years? Note to interviewer: READ OUT and SINGLE CODE

1

- 0% Micro – 100 sq ft – 5,000 sq ft
- 0% Small – 5,001 – 10,000 sq ft
- 0% Medium – 10,001 – 25,000 sq ft
- 0% Large – 25,001 – 40,000 sq ft
- 0% Extra Large – 40,001 sq ft +
- 0% Don't know

Q15b Ask only if Daventry (D3): And what is the ideal type of premises? Note to interviewer: READ OUT and SINGLE CODE

2

- 0% Industrial
- 0% Office
- 0% Retail
- 0% Other commercial
- 0% Don't know

Q15b Ask only if Daventry (D4): And what is the ideal type of location? Note to interviewer: READ OUT and SINGLE CODE

3

- 0% Within Daventry District
- 0% Within SEMLEP area
- 0% Outside of SEMLEP area
- 0% Don't know

Q16 Ask all: Are you thinking of relocating your business? Note to interviewer: Probe and SINGLE CODE

- 5% Yes, within the Local Authority Area
- 0% Yes, within the SEMLEP area
- 5% Yes, outside the SEMLEP area
- 90% No
- 0% Don't know

If 'Yes' at Q16, please continue, otherwise please go to Q18 - this is automated on-line.

Q17 Why are you thinking of re-locating? Note to interviewer: DO NOT READ OUT. PROBE AND SELECT ALL THAT APPLY.

- 0% Lower cost
- 38% Larger premises
- 0% Smaller premises
- 5% Higher specification
- 0% Access to ICT
- 0% Improved parking
- 0% Closer to transport links
- 11% Closer to town centres
- 46% Other
- 0% Don't know

If 'Other', please specify:

Q17a ASK IF CHERWELL (C2), SOUTH NORTHAMPTONSHIRE (SN3), Northampton (N2), Daventry (D5) AND CODED 'YES' AT Q16: Would you consider staying in the district if the right premises were available? Note to interviewer: SINGLE CODE ONLY.

1

- 0% Yes
- 0% No
- 0% Don't know

Q17a ASK IF CHERWELL (C3), SOUTH NORTHAMPTONSHIRE (SN4) or Northampton (N3) AND CODED 'YES' AT Q16: What factors would influence your decision? Note to interviewer: DO NOT READ OUT. PROBE AND SELECT ALL THAT APPLY.

2

- 0% Access to markets
- 0% Access to transport links
- 0% Proximity to suppliers/supply chains
- 0% Proximity to other firms in the same sector
- 0% Cost of labour
- 0% Access to skilled labour
- 0% Availability of suitable land and/or premises
- 0% Quality of local environment
- 0% Quality of premises
- 0% Size of premises
- 0% Personal/historic reasons
- 0% Proximity to higher education, research or other trade organisations
- 0% Financial support/assistance
- 0% Other
- 0% Don't know

If 'Other', please specify:

Section E: Employment, Skills and Training

Q18 Ask all: Have you had any vacancies in the last 12 months? Note to interviewer: Single code.

35% Yes

65% No

If 'Yes' at Q18, please continue, otherwise please go to Q24 - this is automated on-line.

Q19 Have you had any vacancies in the last 12 months that you have found hard to fill? Note to interviewer: Single code.

56% Yes

44% No

If 'Yes', please continue, otherwise go to Q22 - this is automated on-line.

Q20 Can you please tell me the job titles or functions you have found hard to fill? (Question coded at analysis stage)

0% Managerial

0% Plant and Machine Operatives

4% Metal Forming, Welding and Related Trades

14% Construction and Building Trades

0% Housekeeping and Related Services

0% Road Transport Drivers

13% Business, Research and Administrative Occupations

19% Sales Assistants and Retail Cashiers

0% Draughtspersons and Related Architectural Occupations

1% Design Occupations

3% Sales, Marketing and Related Associated Occupations

3% Science, Engineering and Production Technicians

3% Metal Machining, Fitting and Instrument Making

0% Information Technology and Telecommunication

0% Business, Finance and Related Associated Occupations

0% Other Administrative Occupations

13% Vehicle Trades

0% Childcare and Related Personal Services

0% Elementary Agricultural Occupations

0% Elementary Cleaning Occupations

0% Other Elementary Service Occupations

2% Production Managers and Directors

19% Electrical and Electronic Trades

5% Food Preparation and Hospitality Trades

Q21 What have been the main causes of having hard to fill vacancies? Note to interviewer: **DO NOT READ OUT. PROBE AND SELECT ALL THAT APPLY.**

- 76% Low number of applicants with the required skills
- 0% Lack of qualifications the company demands
- 0% Lack of work experience the company demands
- 6% Low number of applicants with the required attitude, motivation or personality
- 14% Low number of applicants generally
- 0% Poor terms and conditions (e.g. pay) offered for post
- 0% The growth of the business / increase in workload
- 1% Too much competition from other employers
- 0% Remote location/poor public transport
- 0% Poor career progression / lack of prospects
- 0% Job entails shift work/unsociable hours
- 0% Seasonal work
- 8% Other
- 0% No particular reason
- 0% Don't know

If 'Other', please specify:

Q22 Ask if 'Yes' at Q18: Have you found any of the following skills difficult to obtain when recruiting staff in the last 12 months? Note to interviewer: Read Out. **SELECT ALL THAT APPLY.**

- 0% Literacy
- 0% Numeracy
- 0% Basic IT skills
- 0% Advanced IT skills
- 0% Managerial Skills
- 27% Technical or practical skills
- 0% Communication skills
- 0% Customer Service skills
- 6% Sales and Marketing
- 0% Foreign Languages
- 0% Knowledge of English among non-native speakers
- 0% Team working skills
- 0% Problem solving skills
- 0% Planning and organisational skills
- 29% Job specific skills
- 8% General employability
- 2% Other
- 47% None

If 'Other', please specify:

If selected a skill above, please continue, otherwise go to Q24 - this is automated on-line.

Q23 Why have you found these skills difficult to obtain? Note to interviewer: DO NOT READ OUT. PROBE AND SELECT ALL THAT APPLY.

- 3% Lack of work ready school leavers
- 0% Lack of work ready college/further education leavers
- 0% Lack of work ready university higher education leavers
- 29% Poor quality applicants generally
- 37% Low quantity of applicants available
- 0% People applying for jobs they are not suited to
- 7% General lack of skills in available workforce
- 0% High and unaffordable salary expectations
- 17% Other
- 12% Don't know

If 'Other', please specify:

Q24 Ask all: Do you have skills gaps in your *existing* workforce in any of the following areas? Note to interviewer: Read Out. SELECT ALL THAT APPLY.

- 0% Literacy
- 1% Numeracy
- 1% Basic IT skills
- 1% Advanced IT skills
- 2% Managerial Skills
- 5% Technical or practical skills
- 1% Communication skills
- 1% Customer Service skills
- 5% Sales and Marketing
- 1% Foreign Languages
- 0% Knowledge of English among non-native speakers
- 0% Team working skills
- 0% Problem solving skills
- 0% Planning and organisational skills
- 6% Job specific skills
- 1% General employability
- 5% Other
- 73% None

If 'Other', please specify:

Q25 Ask all: What actions have you taken to increase skills? Note to interviewer: Probe and Select all that apply.

- 0% Engaging with schools, colleges and Universities
- 4% Investing in apprenticeships
- 39% Offering in-house training & development
- 24% Outsourcing training & development
- 0% Relying on agencies to recruit skilled people
- 1% Other
- 19% Not doing anything
- 34% Not applicable - no skills gaps

If 'Other', please specify:

If Skills gaps in existing workforce, please continue, otherwise please go to Q27 - this is automated on-line.

Q26 Why do you think there are skills gaps amongst your existing workforce? Note to interviewer: DO NOT READ OUT. PROBE AND SELECT ALL THAT APPLY.

- 11% Lack of appropriate training or courses
- 0% Inflexible times/durations for training or courses
- 0% Not prepared/able to release staff during work hours
- 0% Staff judged not capable of progression
- 0% Lack of investment in staff training and development
- 15% Insufficient budget to provide training courses
- 0% Existing staff not seeking upskilling
- 0% No workforce development plan
- 42% Other
- 32% Don't know

If 'Other', please specify:

Q27 Ask all: What level of qualifications do your staff hold? Note to interviewer: READ OUT. Select all relevant answers.

- 21% No qualifications
- 10% Level 1 qualifications
- 21% Level 2 qualifications (GCSE A*-C)
- 24% Level 3 qualifications (A Level A-E)
- 9% Level 4 qualifications (HNC)
- 12% Level 5 qualifications (HND, Foundation Degree)
- 21% Level 6 qualifications (Degree)
- 4% Level 7 qualifications (Masters)
- 2% Other
- 1% Don't know

Q27a Ask if Milton Keynes only (MK1): Over the past 12 months, have you funded or arranged any of the following training for your employees? Note to interviewer: READ OUT. Select all relevant answers.

- 0% Off-the-job (i.e. training away from the individual's immediate work position, whether on your premises or elsewhere)
- 0% On-the-job training
- 0% No training offered
- 0% Don't know

Q27b Ask if Milton Keynes only and 'No' training offered: (MK2): What are the reasons for not funding or arranging training? Note to interviewer: Probe and select all relevant answers.

- 0% Not a business priority
- 0% Too expensive/do not have the funds
- 0% Lack of appropriate training/courses available locally
- 0% Unable to release staff
- 0% Need more information
- 0% Staff already have the skills/qualifications they need

- 0% Staff not interested in training
- 0% Do not have the time to organise/deliver training
- 0% Other

If 'Other', please specify:

Q28 Ask all: I would now like to ask you a few questions about apprenticeships. By “apprenticeships” I mean an apprenticeship scheme that follows a formal framework and leads to a nationally recognised qualification.

Do you employ anyone on an apprenticeship programme currently? Note to interviewer: SINGLE CODE ONLY.

- 8% Yes
- 92% No

If 'No', please continue, otherwise please go to Q31 - this is automated on-line.

Q29 Would you consider taking on an apprentice? Note to interviewer: SINGLE CODE ONLY.

- 40% Yes
- 60% No

If 'No', please continue, otherwise please go to Q31 - this is automated on-line.

Q30 Why would you not consider employing apprentices? Note to interviewer: DO NOT READ OUT. PROBE AND SELECT ALL THAT APPLY.

- 58% No current business need
- 1% Cost
- 13% Poor experience of apprenticeships
- 2% Cannot find suitable candidates
- 0% Apprentices don't have the necessary skills / experience / qualifications / we want to employ people that are ready to do the job
- 3% Over complex process
- 4% Size of business is too small
- 3% Business / type of work is unsuitable for apprentices
- 12% Other
- 7% Don't know

If 'Other', please specify:

Q30a Ask to Milton Keynes only (MK3): Has the introduction of the Apprenticeship Levy had an impact (good or bad) on your business, or do you expect it to have an impact in the future? Note to interviewer: DO NOT READ OUT. SELECT ONE ANSWER ONLY.

- 0% No, we are not a levy payer [i.e. wage bill less than £3 million per annum]
- 0% No, we are a levy payer but already have an apprenticeship model in place
- 0% Yes, it has or will have an impact
- 0% Don't know

Q30a 2 Ask if Milton Keynes only and answered 'Yes' to previous question (MK4): What have/will be the impact? Note to interviewer: DO NOT READ OUT. Select all relevant answers.

- 0% We will be taking on new apprentices
- 0% We will be placing existing employees on apprenticeships
- 0% We will be investing less in other elements of workforce development or training
- 0% Other

If 'Other', please specify:

Q31 Ask all: Which groups, or in what ways, do you offer work experience? Note to interviewer: DO NOT READ OUT. Select all relevant answers.

- 34% School students age 14-16
- 19% School/College students age 17-19
- 11% Further or Higher Education Students age 19-24
- 1% Traineeships
- 1% Internships
- 0% Adult schemes
- 0% Other
- 55% No work experience offered
- 1% Don't know

If 'Other', please specify:

If 'No work experience offered', please continue, otherwise go to Q33 - this is automated on-line.

Q32 Why do you not offer work experience? Note to interviewer: DO NOT READ OUT. Select all relevant answers.

- 25% Lack of time
- 11% Lack of opportunities
- 7% Do not see value
- 0% Do not know how to arrange
- 61% Other
- 10% Business too dangerous/not appropriate

If 'Other', please specify:

Q32a 1 Ask if Milton Keynes only (MK5): What links do you have with local schools? Note to interviewers: DO NOT READ OUT. Select all relevant answers.

- 0% Offer work experience for pupils
- 0% Conduct talks/seminars/presentations in local schools
- 0% Local schools visit our business/site of work
- 0% Other
- 0% None of the above

If 'Other', please specify:

- Q32b Ask if Luton only (L1): Does your business currently engage with schools and colleges? Note to interviewer: DO NOT READ OUT. Select all relevant answers
- 1 0% Yes
 - 0% No
 - 0% Engage with schools/colleges outside Luton
 - 0% Not sure/don't know

Ask if Luton or Northampton only - Section: Suppliers and Customers

- Q32b ASK IF LUTON (L2) or Northampton (N4): Do you buy from local suppliers that are within a 5 mile radius? Note to interviewer: SINGLE CODE ONLY.
- 2 0% Yes
 - 0% No
 - 0% Don't know

- Q32b ASK IF LUTON (L3) or Northampton (N5) AND CODED 'YES' to previous question: Which, if any, of the following aspects of the local supply chain do you feel need improving? Note to interviewer: READ OUT AND SELECT ALL THAT APPLY.
- 3 0% Reliability of local suppliers
 - 0% Cost of local suppliers
 - 0% Customer service provided
 - 0% Ability to meet quality standards
 - 0% Other
 - 0% Don't know

If 'Other', please specify:

- Q32c ASK IF LUTON (L4) AND CODED 'NO' AT Q32b2: Which of the following aspects of the local supply chain explain your reasons for choosing not to buy locally? Note to interviewer: READ OUT AND SELECT ALL THAT APPLY.
- 1 0% Reliability of local suppliers
 - 0% Cost of local suppliers
 - 0% Customer service provided
 - 0% Lack of ability to meet quality standards
 - 0% Other
 - 0% Don't know
 - 0% Lack of supply

If 'Other', please specify:

Section F: Innovation

- Q33 Ask all: Does your business have any links with universities or colleges for research and development purposes? Note to interviewer: SINGLE CODE ONLY.
- 10% Yes
 - 89% No
 - 1% Don't know

Q34 Ask all: Has your business introduced any new products, services, patents or processes in the past 12 months?

Note to interviewer: SINGLE CODE ONLY.

20% Yes

80% No

1% Don't know

Q35 Ask all: And do you expect to introduce any new products, services, patents or new processes in the next 12 months?

Note to interviewer: SINGLE CODE ONLY.

22% Yes

78% No

1% Don't know

Q35a Ask to Central Bedfordshire only (CB5) and if answered 'No' to both Q34 and Q35: Does your business consider that any of the following are potential barriers to innovation? Note to interviewer: Read out and Select all relevant answers

16% Availability of finance

14% Direct innovation costs too high

62% Excessive perceived economic risks

0% Cost of finance

10% Lack of qualified personnel

0% Lack of information on markets

0% Lack of information on technology

0% Market dominated by established business

11% Uncertain demand for innovation, goods or services

0% UK Government regulations

0% EU regulations

71% Not interested/not a priority/not relevant to business

If 'Other', please specify:

Section G: Regulation

Q36 Ask all: Do you believe effective regulation supports your business operations? Note to interviewer: SINGLE CODE ONLY.

50% Yes

28% No

22% Don't know

If 'No', please continue, otherwise go to Q38 or Q39 - this is automated on-line

Q37 Which of the following reasons describe why regulation does not support your business operations? Note to interviewer: READ OUT AND SELECT ALL THAT APPLY.

12% Regulation is difficult to understand

94% There is too much regulation

2% There is a lack of access to regulation

0% You have unproductive relationships with regulators

5% Other

If 'Other', please specify:

ASK If selected option 16 under Q12 (i.e. you consider regulation/red tape to be a constraint to business growth), otherwise go to Q39 - this is automated on-line

Q38 Which type of regulation is an issue? Note to interviewer: READ OUT/PROBE AND SELECT ALL THAT APPLY.

- 0% Planning
- 0% Fire Service
- 28% Health and Safety Executive
- 42% Environmental Health
- 0% Environment Agency
- 0% Trading Standards
- 0% Border Agency
- 0% Other
- 30% None of these

If 'Other', please specify:

Section H: SEMLEP

Q39 Ask all: Before today, had you heard of SEMLEP (South East Midlands Local Enterprise Partnership)? Note to interviewer: SINGLE CODE ONLY.

- 20% Yes
- 80% No

If 'Yes', please continue, otherwise go to Q41 - this is automated on-line

Q40 How had you heard of SEMLEP? Note to interviewer: DO NOT READ OUT. SELECT ALL THAT APPLY.

- 0% Press/Media
- 45% Communications from my Local Authority
- 20% Communications from SEMLEP direct
- 24% Other
- 11% Can't recall

If 'Other', please specify:

Q41 Ask all - READ OUT: "SEMLEP is a Local Enterprise Partnership which aims to create the right environment for businesses to grow locally."
What do you think SEMLEP should focus on to help businesses and the local economy grow? Note to interviewer: DO NOT READ OUT. PROBE AND SELECT ALL THAT APPLY.

- 4% Delivering **infrastructure** improvements to encourage business and economic growth e.g. improved travel and transport network, improvements to broadband
- 0% **Attracting new businesses** in to the area i.e. inward investment
- 8% Helping to ensure an appropriate **supply of skilled labour** is available to meet business demand
- 8% Securing **funding** to support new investment/projects
- 12% **Lobbying Central Government** to the benefit of local businesses and the local economy
- 35% Providing **support to businesses** (e.g. through business advice services)
- 49% Other
- 40% Don't know

If 'Other', please specify:

Section I: About your business

It is important we can understand the profile of business owners in the region. As such we would like to ask you some questions about your own personal situation. IF NECESSARY: Please remember all of your answers are given in confidence and will never be reported in any way that could allow you to be identified.

Q42a ASK SOLE TRADERS only: Which of the following apply to you? Note to interviewer: READ OUT. Select all relevant answers.

- 61% You would describe yourself as belonging to an ethnic minority group
- 24% You would describe yourself as having a long-term illness or disability which has a substantial and long-term negative effect on your ability to carry out normal day to day activities
- 36% None of the above

Q42b Ask sole traders only: Interviewer: Please record gender of respondent (do not ask)

- 62% Male
- 38% Female

Q42c Ask to non-sole traders: For each of the following, please estimate the percentage of partners or board directors in your business that are . . . ? Note to interviewer: READ OUT. SINGLE CODE.

	0-10%	11-24%	25-49%	50%+	Don't know
Women	52%	10%	5%	32%	0%
Belong to minority ethnic groups	80%	9%	2%	9%	1%
Have a long-standing illness or disability IF RESPONDENT UNSURE READ OUT: The Equality Act defines a person as having a disability if he or she 'has a physical or mental impairment, which has a substantial and long-term negative effect on his or her ability to carry out normal day to day activities'	74%	9%	1%	5%	11%

Q43 Ask all: Does your business offer any of the following working practices? Note to interviewer: READ OUT and Select all relevant answers.

- 61% Part time working
- 63% Flexible working
- 8% Proactive policies to recruit from protected groups
- 0% Other
- 31% None of the above

If 'Other', please specify:

Q44a Ask all: Would you be interested in finding out more about the following? [Inform respondent that we will pass their details on to the appropriate organisation] Note to interviewer: Read out and select all relevant answers.

Ask all: Growth Hub (i.e. Velocity or Northamptonshire Growth Hub) - which is a FREE business support programme that has been set up to make it easier for businesses to maximise their growth potential (i.e. increase sales, improve productivity and employ more people). It provides advice from local business advisers, access to grant funding, a dedicated online portal, a telephone helpdesk and a whole range of events and training.

Ask all: Business information and support from SEMLEP or your local Council

Ask all: Opportunities to engage in further research or consultation about local economic and business issues

Ask if selected 'Yes' to apprenticeship questions at Q28 or Q29: Apprenticeships

Ask if selected a positive answer at Q9a3 and South Northamptonshire Council: Business support from South Northamptonshire Council

Ask if selected a positive answer at Q9a4 and Daventry Council: Business support from Daventry Council

Ask if selected a positive answer at Q9a4 and Cherwell District Council: Business support from Cherwell District Council

Ask if selected 'Yes' at Q17a1 and Daventry Council: Information from Daventry District Council (which owns and develops commercial premises) about accessing commercial premises

Ask if selected 'Yes' at Q17a1 and Cherwell District Council: Information about relocating your premises from Cherwell District Council

Ask if selected 'Yes' at Q19 and Cherwell District Council: Support from Cherwell District Council regarding your hard to fill vacancies

Ask if Milton Keynes only: Information from Milton Keynes Council/Invest MK to support your business

Ask if South Northamptonshire only: Information about future events relevant to local businesses

Q44b ASK IF CHERWELL (C4) OR SOUTH NORTHAMPTONSHIRE (SN5)

Your Council operates a free recruitment service through its Job Club and Job Match Service which many local businesses have benefitted from. Would you be interested in using either of these Services to support your business?

IF YES: Can we pass your details on to the Council for this purpose? Note to interviewer: SINGLE CODE ONLY.

0% Yes, pass on my details

0% Yes, but do not pass on my details

0% No

Q44c Could you confirm your name, contact number and e-mail address? Interviewer record:
Name:

Business:

Contact number:

E-mail:

Q45 Do you have any other comments or points you would like to make about the issues discussed in this survey? Note to interviewer: If the respondent has any additional comments or points to raise, please record here.

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