Southend-on-Sea Business Survey 2016

Summary report of the results of a telephone survey of businesses

April 2016

Prepared by: Marketing Means

For:

Southend-on-Sea Borough Council
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Executive Summary

This report sets out the findings of a telephone survey of businesses in Southend-on-Sea, conducted by Marketing Means in February/March 2016 on behalf of Southend-on-Sea Borough Council. The Council is looking to better understand its local business market, allowing it to deliver a more targeted, appropriate approach to business support.

The survey aimed to include the views of a broadly representative sample by business sector and size. Data were weighted to better reflect the actual profile of the Borough’s businesses by sector and size.

This Executive Summary sets out the key results of the telephone survey.

Times series analysis - SUMMARY

The table overleaf shows the key indicators from 2016 compared to the results from the 2012 survey. Figures shown in blue are higher in 2016, and those in red lower in 2016, those in bold significantly so.

Significant improvements can be seen in:
- Fewer concerns over high energy costs;
- Fewer concerns over low profitability of the sector;
- More expecting turnover to increase;
- More exporters;
- Fewer travelling to work by car/van.

Significant reductions/deteriorations are evident in:
- Reduction in the proportion with a training plan/budget;
- Increased incidence of recruitment difficulties;
- Lower awareness of the Council as a business support service provider;
- Fewer with a travel plan;

Other significant changes worth noting include:
- Lower proportion rating Tourism as important to their business;
- More importers;
- More businesses reliant on broadband for their operation.
Business Characteristics

- Marketing Means completed interviews with 494 businesses overall, 483 by telephone, and 11 online. Among these:
  - 22% were in Wholesale/Retail, 11% in Manufacturing, 9% in Finance, 8% in Construction/Building/Renovation, and 8% in Health/Social care, with smaller representations of other sectors.
  - Just over three-quarters of the businesses interviewed employed 1 to 5 people (FTE), 16% employed 6 to 10 people, and 8% employed 11+ people.
  - Almost all of the businesses interviewed were UK-owned, 90% operated from a single site, and two-thirds (67%) were family-run. Only 2% were franchises.
  - Exactly two-thirds (67%) had been established more than 10 years ago, while 21% had been operating for 5 years or less.

Business Health

- In regard to expected increases/decreases in aspects of the business’s performance, respondents tended to expect no change. A marked exception to this was Turnover, which 57% of businesses expected would increase in the next 6-12 months, with only 9% anticipating a decrease.
- The customer base of just under half of businesses (45%) was primarily ‘Local’, while a further 25% stated that their customers were ‘County-wide’. Just under one in 10 (9%) stated that most of their customers were based outside the UK.
- If suitable advice on exporting were made available, one in six businesses whose customers were mainly within the UK stated that they would consider exporting.
- Just under one in four businesses (24%) imported any services.
- One in five businesses (20%) rated tourism as important to their success.
- Each of six suggested aspects of business operation was rated as important by more than 60% of responses. Skills and Parking were the two considered most important, each rated Very important by about two-thirds of businesses.
- When asked which other factors were likely to have a negative impact, higher costs to business and lack of improvement in the economy were the factors most often mentioned.
- In regard to suppliers, a third of businesses (34%) used mainly ‘Local’ suppliers, while half stated that most of their suppliers were UK-wide. Only 8% stated that most of their suppliers were based overseas.
- The four best-known business support services/providers were the FSB, Southend-on-Sea Council (known to 66% as a business support service), Essex Chamber of Commerce, and the University of Essex.
- Just over two-thirds (68%) of businesses were aware of some of the types of traineeships, work experience opportunities or apprenticeships that are available.
- Just over one in five businesses (21%) stated that they had quoted or tendered for a public contract in the past. A further 31% had not done so in the past but felt that they would do if support was made available to help them.
Factors Affecting Business Performance

- Two-thirds of businesses (67%) were satisfied with Southend-on-Sea as a location for investment, 21% being very satisfied. Only 8% were dissatisfied.
- The aspects of living and working in Southend that businesses were most likely to rate as the best were the location (by 53%) and transport connections (by 23%).
- The leading negative factors impacting on business performance were:
  - Issues relating to parking and transport, especially parking costs/availability (mentioned by 56%), and local traffic congestion (by 38%).
  - Market-specific factors included increasing competition (48%) and limited demand for products (21%).
  - Costs and overheads were often mentioned; 31% noted low profitability and 28% energy costs and labour costs.
  - One in five (20%) mentioned lack of external advice and support.
- Where limitations of being located in Southend were identified, they focused mainly on parking costs/availability (40%) and local traffic congestion (23%).

Training and Recruitment

- Just over one in five businesses (21%) had experienced recruitment difficulties in the last year.
- Nearly three-quarters of businesses (73%) had neither a training budget nor a training plan.
- Half of the businesses (50%) had not identified any skills gaps in their workforce.

Apprenticeships

- Just over a tenth (12%) of businesses were currently employing an apprentice.
- Just over one in five (22%) stated that they were planning to take on an apprentice in the next 12 months.
- Nearly nine out of ten (85%) of the businesses currently employing or planning to employ an apprentice expected that they would be able to offer them a job at the end of their placement.
- One in five (20%) of the businesses neither employing nor expecting to employ an apprentice stated that they would be interested in doing so if support were available.

Environmental issues

- The modes of transport most likely to be named as the primary transport method used in operating businesses were the car (for 58%) and van (for 28%).
- In regard to their employees’ main method of travel to work, 69% of businesses stated that this was by car, 26% on foot, 15% by bus, 9% by train, and 7% by cycle.
- Only 4% of businesses had a travel plan in place.
- Slightly fewer than one in five businesses (19%) had any plans in place to undertake carbon reduction measures.
Broadband

- Just over three-quarters (77%) of businesses stated that their business was reliant on broadband coverage, while exactly the same proportion stated that their current broadband service was sufficient.
  - It may be worth noting that businesses with plans to relocate from their current base in Southend were twice as likely as others to feel that they did not have sufficient broadband coverage.

Corporate Social Responsibility

- Slightly less than one in six businesses (16%) had a Corporate Social Responsibility policy.
- Nearly half of businesses (46%) already had links with the local community or local charities. A further 16% had no such current links but stated that they would like support from the Council to develop them.
1. Introduction

1.1 Background and objectives

- Southend-on-Sea Borough Council (SBC) last surveyed a sample of the businesses in the town in 2012 to support its Local Economic Assessment. In late 2015, the Council decided that trends and new funding opportunities required a new survey of businesses to be conducted, in order that the Council could obtain an accurate picture of businesses in Southend which reflects their needs. This was with the aim of allowing the Council to deliver a more targeted, appropriate approach to business support.

- Objectives of the survey could be summarised as:
  - To help identify future priorities for actions and support.
  - To support inward investment activities.
  - To enable SBC to monitor trends and opinions.
  - To analyse how the physical/social infrastructure of Southend either enables or acts as a barrier to business competitiveness.
  - To identify particular problems faced by businesses where they may need further help.
  - To monitor how these factors are developing over time.
  - To obtain the views of businesses on key issues to inform future development
  - To contribute to the work of the Inward Investment strategic team.

- In January 2016, Southend-on-Sea Borough Council therefore commissioned Marketing Means to conduct a telephone survey of businesses in the Borough.

- The survey used a questionnaire designed by the Borough Council’s project team, with some input and amendments from Marketing Means, and based to a large extent on the 2012 survey questionnaire given the need to track some key results over time.

- In this report, we present the results of the survey fieldwork that addressed this research need.

1.2 Method – telephone survey

- Marketing Means conducted the research in the form of a telephone survey from our call centre in Ashburton, Devon.

- Marketing Means purchased the sample of businesses in the Borough from commercial list supplier Data HQ. From the outset, it was agreed that the fieldwork team would be given quota targets by business size (number of employees) and business sector. This was done in order for the interviewed sample to represent a good range of different businesses, and to try to ensure that enough businesses were interviewed in different sub-groups to allow reasonably statistically robust comparisons to be made between them.

  - The records within the sample ordered, of 3,414 organisations, were therefore flagged with business size (number of employees) and industry sector. The latter in particular reflected the Council’s wish that six key industry sectors, referred to in this report as the ‘Boosted’ sectors were given a particular focus and an effort made to complete as many interviews as possible in those sectors of importance to the local economy. Those sectors were:
    - Tourism
    - Retail
- Creative and Cultural
- Medical Technologies
- Finance and Business Support Services
- Advanced Engineering and Aviation

The final version of the questionnaire is included at Appendix 1 of this report. The average duration of telephone interviews was 23 minutes.

Marketing Means completed 483 telephone interviews between 5th February and 21st March 2016.

Where potential respondents stated that they would only be able to take part by completing the questionnaire online, interviewers recorded their contact email address. Marketing Means’ research team emailed a unique web-link (incorporating a password) to an online version of the survey questionnaire to all who requested it. Out of 321 businesses who requested this online version, 11 took part, giving a final total of 494 completed questionnaires from businesses.

The structure of the final sample by the target groupings of business size and sector is shown in Table 1 below. The data were weighted by employee number and industry sector grouping to the best available 2015 business profile for the Borough, provided by the Office for National Statistics which held a population of 6,475 registered businesses.

Table 1: Survey targets and achieved totals by sub-groups of businesses

<table>
<thead>
<tr>
<th>Grouping</th>
<th>ONS Totals</th>
<th>Survey responses</th>
<th>Weighted sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of employees:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Micro (0 to 9)</td>
<td>5,865</td>
<td>370</td>
<td>447.5</td>
</tr>
<tr>
<td>Small (10 to 49)</td>
<td>515</td>
<td>109</td>
<td>39.3</td>
</tr>
<tr>
<td>Medium/Large (50+)</td>
<td>95</td>
<td>15</td>
<td>7.2</td>
</tr>
<tr>
<td>Industry sector:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 1: Agriculture, forestry &amp; fishing (A); Mining, quarrying &amp; utilities (B,D and E); Manufacturing (C); Construction (F)</td>
<td>1,320</td>
<td>66</td>
<td>99.6</td>
</tr>
<tr>
<td>Group 2: Motor trades (G), Wholesale (G), Retail (G)</td>
<td>1,090</td>
<td>148</td>
<td>82.4</td>
</tr>
<tr>
<td>Group 3: Financial &amp; insurance (K); Property (L); Professional, scientific &amp; technical (M); Business administration &amp; support services (N)</td>
<td>2,035</td>
<td>69</td>
<td>153.3</td>
</tr>
<tr>
<td>Group 4: Transport &amp; storage (inc postal) (H); Accommodation &amp; food services (I); Information &amp; communication (J); Public administration &amp; defence (O); Education (P); Health (Q); Arts, entertainment, recreation &amp; other services (R,S,T and U)</td>
<td>2,030</td>
<td>211</td>
<td>158.7</td>
</tr>
<tr>
<td>TOTAL</td>
<td>6,475</td>
<td>494</td>
<td>494</td>
</tr>
</tbody>
</table>
1.3 Arrangement of this report

After the Executive Summary and this Introduction, we provide a commentary on the research results, based around the use of charts and summary tables to set out the key findings.

At the end of the report, we provide Appendix 1 giving the survey questionnaire script.

The full cross-tabulations of results have been provided in a separate Excel spreadsheet volume.

1.4 Author and publication

Chris Bowden of Marketing Means produced this report in April 2016. Any press release or publication of the findings of this survey requires the approval of the author/Marketing Means. Approval would only be refused if it were felt that the intended use would be inaccurate and/or a misrepresentation.

1.5 About reading this report

‘Valid’ responses

In most cases, and unless otherwise stated, the results are given as a percentage of the total overall valid responses, with occasional blank or ‘Don’t know’ responses excluded so as not to skew the findings. ‘Don’t know’ responses are used and shown however where they represent a valid response to the question.

Rounding

The percentage figures quoted in the charts and tables in this report have been rounded either up or down to the nearest whole number value. In some cases, these rounded values do not therefore total exactly 100%, even though the precise values will always do so.
2. Business characteristics

2.1 Business sector

We present first some key characteristics of the businesses interviewed for this project. Chart Q6 below shows the business activities reported by the sample interviewed.

- Wholesale/Retail and Manufacturing were the two best-represented sectors in the sample, both being among the six sectors that were boosted.

Q6. What is the main business activity of your organization on the whole, not necessarily at this site?

Source: Marketing Means 2016
Base: All respondents (494)
2.2 Business size
Chart Q7 below shows the breakdown of number of people employed by the businesses interviewed. The questionnaire asked businesses to report their total number of employees at the site in question (i.e. a single site or head office).

- Just over three-quarters of businesses employed 1 to 5 staff, while a further one in six employed 6 to 10 staff.

Q7. How many staff are employed at this site?

<table>
<thead>
<tr>
<th>Staff Size</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 5</td>
<td>76%</td>
</tr>
<tr>
<td>6 to 10</td>
<td>16%</td>
</tr>
<tr>
<td>11 to 24</td>
<td>4%</td>
</tr>
<tr>
<td>25 to 99</td>
<td>3%</td>
</tr>
<tr>
<td>100 to 199</td>
<td>0%</td>
</tr>
<tr>
<td>200+</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016                        Base: All respondents (494)

**Significant differences between sub-groups**
- The mean number of employees at the businesses that took part was 6.
- The largest workplaces were in the Education sector, with 69, and Transport/Storage, with 14.
- Businesses in operation for at least 11 years were slightly more likely to have more employees, with an average of 7. Businesses operating for up to 5 years had 3 staff on average, while those operating for 6-10 years had an average of 6 staff.
- In terms of full-time and part-time staff, the number of full-time workers was slightly higher than the number of part-timers, with mean values of 3 and 2 respectively.
- Business sectors employing the highest mean numbers of part-time staff were Education (16) and Health/Social Care (4).
- As in the 2012 survey, smaller businesses with up to 5 employees employ fewer part-time staff on average (1) than do those with 6-10 employees (averaging 3 part-timers) or 11+ employees (averaging 12 part-timers).
2.3 Organisation status
Chart Q10-13 below summarises the status of the organisations interviewed.

- All but four of the 494 businesses interviewed were UK-owned.
- Nine out of 10 businesses were operating at a single site, while a further 5% were HQs based in the borough with other sites elsewhere.
- Only 2% were run as franchises, while two-thirds (67%) were family-run.

Q10. Is the business...? (UK or foreign-owned)
Q11. Is the business site...? (Single site, HQ, etc.)
Q12. Is the business a franchise?
Q13. Is the business a family-run business?

Significant differences between sub-groups
- Workplaces with 11+ staff were more likely than those with 1 to 5 staff to be branches or subsidiaries with UK headquarters elsewhere (21% vs 2% respectively).
- Workplaces with 1 to 5 staff were much more likely than those with 11+ staff to be single site (94% vs 65% respectively).
- The smallest businesses, employing 1 to 5 staff, were less likely than larger businesses to be franchises. Only 1% of those with 1 to 5 staff were franchises, compared with 4% of those with 6 to 10 staff, and 5% of those with 11+ staff.
- Family-run businesses were significantly less likely to be found among those whose operations were franchises (19% family-run among franchises, vs 68% family-run among non-franchises).
2.4 Length of time established

- Two-thirds of the businesses interviewed (67%) had been in operation for more than 10 years, while just over half had been based at their current location for more than 10 years.
- Just over one in five (21%) had been in operation for 5 years or less.
- Well over half of the businesses (61%) stated that they had always operated from their current location.

Q2. How many years has your business been in operation?
Q5. How many years has your company been in operation at this location?

Significant differences between sub-groups

- The smallest businesses, with 1-5 employees, were slightly more likely than others to have been established for no more than 5 years (24%, vs 14% of those with 6-10 staff and 10% of those with 11+).
- Those small businesses were also the least likely to have been established for more than 10 years (64% of those with 1 to 5 employees, vs 78-82% of those in the higher size bands).
- Businesses established for the shortest time are those most likely never to have moved, with 80% of those established for less than a year never having moved, compared with only 56% of those established for 10 years or more. There were no similar differences by size of business.
- The Wholesale/ Retail and Food/Accommodation sectors were each significantly more likely than others to always have operated from the same location (68% and 89% respectively).
3. Factors Affecting Business Performance

In this section, we present the results for those questions that asked for businesses’ views on external factors, including their location, that might affect business performance.

3.1 Negative factors impacting on business performance

- Issues relating to parking and transport were among those most likely to be mentioned, with just over half of businesses (56%) seeing parking – whether costs or availability - as a negative. A further 38% noted the impact of local traffic congestion, and 9% mentioned poor public transport.

- The most-mentioned market-related factor impacting on business performance was increasing competition, which nearly half (48%) noted as a negative. A further 21% noted limited demand in their principal product areas.

- Costs and overheads were also widely mentioned, with nearly a third (31%) highlighting low profitability, and 28% mentioning both the cost of energy and that of labour. Only slightly fewer mentioned business rates.

- One in five (20%) agreed that lack of external support and advice was a negative factor.

Q14. Are any of the following negative factors impacting on the performance of your business?

![Bar chart showing the percentage of businesses affected by various negative factors.]

- Parking (costs and availability): 56%
- Increasing competition: 48%
- Local traffic congestion: 38%
- Low profitability of sector: 31%
- Bureaucracy: 28%
- High cost of energy: 28%
- High cost of labour: 28%
- Business rates: 23%
- Lack of skilled labour: 22%
- Limited demand in principal product areas: 21%
- Lack of external support and advice: 20%
- Constraints with premises or location: 18%
- Availability / cost of finance: 16%
- High cost of local housing: 15%
- Difficulties in acquiring/using new tech: 11%
- Poor public transport: 9%
- Difficulty in obtaining planning permission: 7%
- Exchange rates: 7%
- Other: (Please specify): 7%
- None of the above: 8%

Source: Marketing Means 2016  
Base: All respondents (494)
**Significant differences between sub-groups**

- Manufacturing businesses were especially likely to agree that Limited demand in principal product areas was a negative factor (48%).
- Construction/Building businesses were more likely than others to cite Parking concerns as a negative factor (82% doing so).
- Food service/Accommodation businesses were especially likely to note Energy costs as a negative factor (56% doing so).
- In terms of business size, those with 11+ employees were significantly more likely than smaller businesses to mention Difficulty in obtaining planning permission (19%). The smallest businesses were the least likely to mention the negative impact of business rates (only 19% doing so, compared with 39% of those with 6-10 staff and 33% of those with 11+ staff).

**3.2 Limitations of being located in Southend**

- When asked about the limitations of their being located in Southend, 40% of businesses felt that none of the issues suggested applied in their case.
- As we have already noted for negative factors on businesses, Parking and Traffic congestion were once again the most likely specific limitations to be mentioned (by 40% and 23% respectively).

**Q16. More specifically, are there any limitations to your business by being located in Southend?**

<table>
<thead>
<tr>
<th>Limitation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking (costs and availability)</td>
<td>40%</td>
</tr>
<tr>
<td>Local traffic congestion</td>
<td>23%</td>
</tr>
<tr>
<td>Increasing competition</td>
<td>15%</td>
</tr>
<tr>
<td>Business rates</td>
<td>12%</td>
</tr>
<tr>
<td>Bureaucracy</td>
<td>12%</td>
</tr>
<tr>
<td>Lack of skilled labour</td>
<td>11%</td>
</tr>
<tr>
<td>High cost of labour</td>
<td>10%</td>
</tr>
<tr>
<td>High cost of energy</td>
<td>9%</td>
</tr>
<tr>
<td>Constraints with premises or location</td>
<td>8%</td>
</tr>
<tr>
<td>Lack of external support and advice</td>
<td>7%</td>
</tr>
<tr>
<td>High cost of local housing</td>
<td>7%</td>
</tr>
<tr>
<td>Limited demand in principal product areas</td>
<td>5%</td>
</tr>
<tr>
<td>Poor public transport</td>
<td>5%</td>
</tr>
<tr>
<td>Availability / cost of finance</td>
<td>4%</td>
</tr>
<tr>
<td>Difficulties in acquiring/ implementing new technology</td>
<td>3%</td>
</tr>
<tr>
<td>Difficulty in obtaining planning permission</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>None of the above</td>
<td>40%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016
Base: All respondents (494)
Significant differences between sub-groups

- Those respondents from the Education sector were significantly more likely than other sectors to mention Poor public transport (34% doing so).
- Businesses with 6-10 employees were slightly less likely than smaller and larger businesses to mention Traffic congestion as a limitation of their Southend location (35% mentioning this), but also slightly less likely to state that none of the suggested limitations affected them.

3.3 Intention to move from the area

- Only one in 10 businesses reported that they had plans to move away from their current Southend location in the next two to three years.

Q18. Does your business have any plans to move away from its current location in Southend in the next two to three years?

![Bar chart showing percentage of businesses planning to move away by sector and employee size.](chart.png)

Source: Marketing Means 2016  
Base: All respondents (494)
Significant differences between sub-groups

While the chart above shows those in the Education sector as being the most likely to be considering a move, there were no statistically significant differences between sectors.

There were significant differences according to business size. Those with 6-10 employees were the least likely to be considering a move, only 2% doing so, compared with 11% of those with 1-5 staff and 19% of those with 11-49 staff. No businesses with 50+ staff were considering moving.

There were no significant differences according to length of establishment. The business types that were significantly more likely than others to be planning a move were:

- Those dissatisfied with the Borough as a location for investment (41% planning a move)
- Those who had experienced recruitment difficulties locally (15% planning a move).
- Those employing apprentices (23% considering a move).

3.4 Satisfaction with Southend Borough

- Nearly half of businesses stated that they were ‘Fairly satisfied’ with the Borough as a location for investment, and overall just over two-thirds (67%) were satisfied. Only 8% were ‘Dissatisfied’.

Q20. How satisfied or dissatisfied are you overall with Southend Borough as a location for investment?

![Satisfaction Chart]

Source: Marketing Means 2016 Base: All who gave a valid answer (473)

Significant differences between sub-groups

- There were no significant differences by business sector.
- Businesses with 6-10 employees were significantly more likely than others to be ‘Neither satisfied nor dissatisfied’ (35%), as were those that had been established for 6-10 years (36%).
- Business types significantly more likely than others to be satisfied or dissatisfied were:
  
  - Franchises (48% Very satisfied with the Borough)
  - Those with a ‘local’ market reach only (26% Very satisfied), or those with a ‘local’ supplier base only (27% Very satisfied)
  - Those with plans to relocate (30% Fairly or Very dissatisfied).
  - Those for whom tourism is important (12% Fairly dissatisfied).
Those employing apprentices (9% Very dissatisfied).

- When asked what they considered the best things about living and working in Southend, Location (selected by 50%) and Transport (selected by 20%) were comfortably the most likely aspects to be selected.
- Half of businesses mentioned an aspect other than those listed in the chart below.

Q21. What do you consider to be the best things about living and working in Southend?

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>53%</td>
</tr>
<tr>
<td>Transport</td>
<td>20%</td>
</tr>
<tr>
<td>Staff</td>
<td>2%</td>
</tr>
<tr>
<td>Low wages</td>
<td>1%</td>
</tr>
<tr>
<td>Skills</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>50%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>17%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016 Base: All respondents (494)

Significant differences between sub-groups
- Businesses in the Administrative services sector were significantly more likely than others to mention Transport as one of the best things about Southend (65% doing so).
- Businesses that had been longest-established, for more than 10 years, were slightly more likely than others to mention both Location (57%) and Transport (23%).
- Franchises were also more likely than others to mention Transport (57%).
4. Training and Recruitment

4.1 Skills gaps

- Half of the businesses (50%) had not identified any skills gaps at all in their current workforce.
- Each of the skills gaps suggested in the questionnaire applied to a relatively small minority of respondents, between 9% and 22%.
- Finding school leavers or graduates with the appropriate skills/attitude was the most likely gap to apply (cited by 22%).

Q22. Have you identified any of the following skills gaps in your current workforce?

<table>
<thead>
<tr>
<th>Skills gap</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>School leavers or graduates with appropriate skills/attitude</td>
<td>22%</td>
</tr>
<tr>
<td>Foreign language skills</td>
<td>15%</td>
</tr>
<tr>
<td>Basic computer literacy skills</td>
<td>14%</td>
</tr>
<tr>
<td>Communication skills</td>
<td>14%</td>
</tr>
<tr>
<td>Numeracy and Literacy skills</td>
<td>13%</td>
</tr>
<tr>
<td>Advanced IT or software skills</td>
<td>12%</td>
</tr>
<tr>
<td>Customer service skills</td>
<td>11%</td>
</tr>
<tr>
<td>High level technical skills</td>
<td>10%</td>
</tr>
<tr>
<td>Strategic / management skills</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>None of the above</td>
<td>50%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016                        Base: All respondents (494)

Significant differences between sub-groups

- The chart on the next page provides the breakdown by sector and size of businesses reporting a skills gap.
- Businesses in the Finance sector were the most likely to have no such skills gaps in their current workforce (80% stating this).
- The smallest businesses with 1-5 employees were the least likely of all to mention gaps in Numeracy/literacy (8%), Communication skills (10%) and Customer service skills (8%). 56% of the smallest businesses reported no such skills gaps.
- Other business types most likely to report no skills gap included:
  - Those with no training plan or budget (54% reporting no skills gaps).
  - Those with no recruitment difficulties (58%).
Those employing apprentices (53%).

Q22. Have you identified any of the following skills gaps in your current workforce? - BY SECTOR & SIZE

- School leavers or graduates with appropriate skills/attitude: 22%
- Foreign language skills: 15%
- Basic computer literacy skills: 14%
- Communication skills: 14%
- Numeracy and Literacy skills: 13%
- Advanced IT or software skills: 12%
- Customer service skills: 11%
- High level technical skills: 10%
- Strategic / management skills: 9%
- Other: 5%
- None of the above: 50%

Source: Marketing Means 2016                        Base: All respondents (494)
4.2 Training budgets and plans

- Nearly three-quarters of businesses (73%) had neither a training budget nor a training plan.
- Among the remainder, twice as many businesses had a training plan as had a training budget.

Q23. Does your company have a training budget or plan?

Significant differences between sub-groups

- The chart on the next page provides the breakdown by sector and size of businesses having a training budget or plan.
- Organisations in the Health/ Social care and Education sectors were the most likely to have a training plan. In Health/ Social Care, 41% had a training budget and 55% a training plan. In Education, both proportions were even higher, with 62% having a training budget and 73% a training plan.
- Organisations with 1-5 employees were significantly more likely than others to have neither a training budget nor a training plan, with 83% falling into that category, compared with only 54% of those with 6-10 employees and 20% of those with 11+ employees.
- Other business types most likely to report no training budget or plan included:
  - Single-site businesses (76%).
  - Those with no recruitment difficulties (79%).
  - Those who employ apprentices (78%).
  - Those who do not import (82%).

Source: Marketing Means 2016  
Base: All respondents (494)
Q23. Does your company have a training budget or plan? - BY SECTOR & SIZE

Source: Marketing Means 2016
Base: All respondents (494)
4.3 Recruitment difficulties

- Just over one in five businesses (21%) stated that they had had recruitment difficulties in the last 12 months.
- The chart below shows how this proportion varied by sector and size of business.

**Q24. Have you had recruitment difficulties in the past 12 months? – BY SECTOR & SIZE**

**Significant differences between sub-groups**
- There were no significant differences by business sector.
- The proportion of businesses that had experienced recruitment difficulties increased with increasing size of business, from 17% of those with 1-5 staff, to 24% of those with 6-10 staff, 41% of those with 11-49 staff and 77% of those with 50+ staff.
– Other business types most likely to report recruitment difficulties included:
  ➢ Those with plans to relocate (32% had recruitment difficulties).
  ➢ Those with a training plan and/or budget (39%).
  ➢ Those who employ apprentices (40%).
5. Apprenticeships

- Just over one in 10 businesses (12%) stated that they were currently employing someone on a Government-approved apprenticeship scheme.
- The chart below shows how this proportion varied by sector and size of business.

Q26. Do you currently employ anyone on a government-approved apprenticeship programme? – BY SECTOR & SIZE

**Significant differences between sub-groups**
- None of the variations in the proportions in each business sector shown in the chart above are statistically significant.
The smallest businesses, with 1-5 employees, were significantly less likely than larger businesses to employ an apprentice (8% of those with 1-5 employees, vs 21% of those with 6-10, and 34% of those employing 11+).

Other business types most likely to report employing an apprentice included:
- Those that were not family-run (17%).
- Those with plans to relocate (27%).
- Those with a training plan or budget (27%).
- Those who had experienced recruitment difficulties (23%).
- Those for whom tourism was not important (14%).

The questionnaire included several further questions relating to apprenticeships.

- Just over one in five businesses (22%) stated that they were planning to take on an apprentice in the next 12 months.
  - This was most likely among larger businesses, with 44% of those employing 11-49 staff expecting to take on an apprentice in the next 12 months.
  - Those with a training plan or budget were also more likely to be planning for an apprentice (35%), as were those who had experienced recruitment difficulties (47%).
  - Those currently employing at least one apprentice were much more likely than those with no apprentices to be planning to take on another (61% vs 17%).

- Among those currently employing an apprentice, or at least expecting to employ one soon, the vast majority (85%) expected to be able to offer them a job on completion of their placement. This proportion was almost identical between those already employing an apprentice and those only currently planning to do so.
  - This was most likely among larger businesses, with 44% of those employing 11-49 staff expecting to take on an apprentice in the next 12 months.
  - Those with a training plan or budget were also more likely to be planning for an apprentice (35%), as were those who had experienced recruitment difficulties (47%).

- Among those not currently employing an apprentice, one in five (20%) claimed that they would be interested in doing so if support were made available.
  - This was higher (at 34%) among businesses who had been established for no more than 10 years.
  - Businesses that had experienced recruitment difficulties were also significantly more likely than others to be interested in employing an apprentice (34%).
  - Among the majority not interested in taking on an apprentice, the most likely reasons to be given were:
    - No current need for extra staff / no plans to expand (by 31%),
    - Don't have the time / space to train an apprentice (17%)
    - Not suitable for our business requirements, e.g. types of staff needed (12%)
6. Business Health

6.1 Important factors for businesses
- Businesses were asked to rate the importance of several aspects that may have an impact on their business operation, as summarised in the chart below.
- Every one of the six aspects listed was rated as either Very or Fairly important by a clear majority of respondents, from 62% for Lifestyle to 87% for Parking.
- For both Parking and Skills, two-thirds of all businesses rated the aspect as ‘Very important’.
- Only for Lifestyle did as many as 30% of respondents rate the aspect as unimportant (Not very or Not at all important).

Q30. How important are each of the following aspects to your business operation?

<table>
<thead>
<tr>
<th></th>
<th>Very important</th>
<th>Fairly important</th>
<th>Not very important</th>
<th>Not at all important</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKILLS</td>
<td>66%</td>
<td>20%</td>
<td>6%</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>PARKING</td>
<td>65%</td>
<td>22%</td>
<td>8%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>STAFFING</td>
<td>48%</td>
<td>20%</td>
<td>12%</td>
<td>16%</td>
<td>4%</td>
</tr>
<tr>
<td>TRANSPORT</td>
<td>44%</td>
<td>30%</td>
<td>16%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>HIGHWAYS</td>
<td>43%</td>
<td>29%</td>
<td>16%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>LIFESTYLE</td>
<td>32%</td>
<td>30%</td>
<td>16%</td>
<td>14%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016                        Base: All respondents (494)

Significant differences between sub-groups
- The business types most likely to rate Skills as important (Very or Fairly) included:
  ➢ Information/ Communication sector (95% rating Skills as important).
  ➢ Those with a training plan/budget (94%).
  ➢ Those who had experienced recruitment difficulties (93%).
- The business types most likely to rate Parking as important (Very or Fairly) included:
  ➢ Those in the Construction/Building sector (99%), those in Wholesale/Retail (94%) and those in Food services/ Accommodation (97%).
  ➢ Those dissatisfied with Southend as a location for investment (97%).
  ➢ Those rating Tourism as important to their business (94%).
  ➢ Those with a Local client base (92%).
Those with a Local supplier base (93%).

The business types most likely to rate **Staffing** as important (Very or Fairly) included:

- Businesses with 6-10 employees (91%) or 11+ employees (99%).
- Those with a training plan/ budget (91%).
- Those that have experienced recruitment difficulties (91%).
- Those that employ apprentices (94%).

The business types most likely to rate **Transport** as important (Very or Fairly) included:

- Those with plans to relocate (90%).
- Those with a county-wide market (88%).

The business types most likely to rate **Highways** as important (Very or Fairly) included:

- Businesses in the Construction/Building sector (94%).
- Family-run (75%).
- Those with a UK-wide reach (74%).

The business types most likely to rate **Lifestyle** as important (Very or Fairly) included:

- Businesses in the Construction/Building sector (84%).
- Those established for up to 10 years (75%).
- Those who rated Tourism as important to their operations (76%).
- Importers (73%)

### 6.2 Importance of tourism

- Nearly eight out of 10 businesses (79%) did not consider tourism to be important to the success of their business. Well over half (59%) rated it Not at all important.

#### Q32. How important is tourism to the success of your business?

![Bar chart showing the importance of tourism](chart.png)

Source: Marketing Means 2016  
Base: All who gave a valid answer (492)

**Significant differences between sub-groups**

- Two business sectors were significantly more likely than others to rate tourism as Very important, namely Food services/Accommodation (40% Very important) and Arts/Entertainment/Leisure (41% Very important).
Other business types most likely to rate tourism as important included:

- Those dissatisfied with the Borough as a location for investment (30% rating Tourism as Very important, 12% fairly important).
- Family-run businesses (25% rating Tourism as important compared with only 12% of those that were not family-run).

### 6.3 Business confidence

- The chart below summarises businesses’ expectations in regard to a range of aspects of their performance over the next 6-12 months. The blue-shaded represent positive views, i.e. an increase, while red-shaded areas represent negative views, i.e. a decrease.
- Businesses’ views tended to be neutral, i.e. the majority expecting the various aspects of performance to remain the same in the coming 12 months, with the notable exception of Turnover. Expectations of Turnover were markedly more positive than those for other aspects, with the majority (57%) expecting an increase over the next 12 months. Turnover also, however, drew the highest proportion (albeit only 9%) expecting a decrease.

#### Q33. Looking forward over the next 6-12 months, how do you expect your business to perform in terms of the following aspects?

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Increase</th>
<th>Remain the same</th>
<th>Decrease</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnover</td>
<td>57%</td>
<td>30%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Investment</td>
<td>27%</td>
<td>54%</td>
<td>4%</td>
<td>15%</td>
</tr>
<tr>
<td>Staffing levels</td>
<td>25%</td>
<td>71%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Stock levels</td>
<td>19%</td>
<td>48%</td>
<td>6%</td>
<td>26%</td>
</tr>
<tr>
<td>Access to finance</td>
<td>14%</td>
<td>60%</td>
<td>3%</td>
<td>23%</td>
</tr>
<tr>
<td>OTHER</td>
<td>5%</td>
<td>92%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016  
Base: All respondents (494)

### Significant differences between sub-groups

- To highlight areas of potential concern, we focus here on business types most likely to expect a decrease in each aspect.
  - For Turnover, businesses most likely to expect a decrease included:
    - The ‘Boosted sectors’, i.e. those that the Council had requested to be particularly represented in the sample. 12% of these expected a decrease vs 5% of other businesses.
Those dissatisfied with the Borough as a location for investment (21% expecting a decrease).

Those for which tourism was not important (11% expecting a decrease, vs 4% of others).

- For Investment, the businesses most likely to expect a decrease included:
  - Those that had experienced recruitment difficulties (9% vs 2% of others).
  - Those dissatisfied with the Borough as a location for investment (21% expecting a decrease).
  - Those for which tourism was not important (11% expecting a decrease, vs 4% of others).

- For Staffing levels, businesses most likely to expect a decrease included:
  - The ‘Boosted sectors’, i.e. those that the Council had requested to be particularly represented in the sample. Although only 4% expected a decrease in staffing levels, this was still significantly higher than the 1% of other businesses.
  - Those dissatisfied with the Borough as a location for investment (8% expecting a decrease).
  - Those with a European/International market reach (8% expecting a decrease).

- For Stock levels, no types of businesses were significantly more likely than any other to expect a decrease.

- For Access to finance, businesses most likely to expect a decrease included:
  - Those established for no more than 5 years (8% expecting a decrease in Access to finance).
Businesses were also asked to think of any other factors which could have a positive impact on their business performance over the next 6-12 months. Those named most often are shown below.

Nearly half could not think of any other factors but several factors were named by close to one in ten businesses, led by winning more customers and business, and an improving economy:

Q34. Are there any other factors which could have a positive impact on your business performance over the next 6-12 months?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More customers / business / demand</td>
<td>10%</td>
</tr>
<tr>
<td>Improving economy</td>
<td>8%</td>
</tr>
<tr>
<td>Government/Council decisions that benefit business</td>
<td>8%</td>
</tr>
<tr>
<td>Better / cheaper parking facilities</td>
<td>6%</td>
</tr>
<tr>
<td>Increased awareness of location / business</td>
<td>4%</td>
</tr>
<tr>
<td>Regeneration / improvement of nearby area</td>
<td>4%</td>
</tr>
<tr>
<td>Lower business rates</td>
<td>3%</td>
</tr>
<tr>
<td>Business improvements, e.g. refurbishment</td>
<td>3%</td>
</tr>
<tr>
<td>Less competition, e.g. restrict imports</td>
<td>2%</td>
</tr>
<tr>
<td>Lower costs to the business</td>
<td>2%</td>
</tr>
<tr>
<td>Weather</td>
<td>2%</td>
</tr>
<tr>
<td>EU referendum</td>
<td>1%</td>
</tr>
<tr>
<td>Road / Transport improvements</td>
<td>1%</td>
</tr>
<tr>
<td>Training / more experience or skilled staff</td>
<td>1%</td>
</tr>
<tr>
<td>Events, e.g. air show, sporting event</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
<tr>
<td>No - None</td>
<td>47%</td>
</tr>
</tbody>
</table>
Businesses were also asked to think of any other factors which could have a negative impact on their business performance over the next 6-12 months. Those named most often are shown below. Just over 40% could not name any factors likely to have a negative impact, but higher costs to business and lack of improvement in the economy were each mentioned by 10%.

Q35. Are there any other factors which could have a negative impact on your business?

- Higher costs to the business / Bankruptcy: 10%
- Economy not improving: 10%
- Gov’t/council decisions not beneficial to business: 8%
- Worse / expensive parking facilities: 6%
- More competition: 6%
- Less customers / business / demand: 5%
- Higher or unchanged business rates: 4%
- No regeneration / decline of local area: 4%
- EU referendum / consequences of being in or out of the EU: 4%
- Road / Transport changes: 3%
- Weather: 2%
- No training / lack of experience or skilled staff: 1%
- No business improvements e.g. refurbishment: 1%
- Not enough awareness of location / business: 0%
- Specific event mentioned (e.g. air show, sporting event): 0%
- Other: 5%
- No: 41%

Source: Marketing Means 2016                        Base: All respondents (494)
6.4 Market reach and import/export activity

- When asked in which area most of their customers are based, just under half of businesses (45%) stated that this was ‘Local’, while a quarter (25%) stated that most of their customers were not so local but still county-wide.

- Just under one in 10 (9%) stated that most of their customers were based overseas.
  - The most common locations of customers based overseas were named as:
    - ‘Worldwide’
    - Australia
    - USA
    - Europe (general)
    - Italy
    - Spain
    - Japan/South Korea

Q36. What is the market “reach” of your business, i.e. the area in which most of your customers are based?

![Market reach chart]

Significant differences between sub-groups

- The business types most likely to have most of their customers overseas, in Europe or beyond, included:
  - The ‘Boosted’ industry sectors (11% exporting vs 6% of others)
  - Manufacturers (32% mainly exporting)
  - Those with plans to relocate (10% of which had most of their customers in Europe).
  - Those dissatisfied with the area as a location for investment (11% of which had most of their customers in Europe).
  - Importers (18% of which had most of their customers based internationally, beyond only Europe)
• Among those whose customers were mainly based overseas, only a very small proportion (5%) had used any international/trade bodies. Two of the 37 such businesses interviewed had used UKTI, two had used the United Nations Department of Economic and Social Affairs, while Export UK and the OECD had each been used by one business interviewed.

• Amongst those for whom most of their customers were based within the UK, 16% stated that they would consider exporting if they received suitable advice. This proportion was highest at 39% among manufacturers, and at 22% among those in the ‘Boosted’ sectors.

• Three-quarters of businesses stated that they do not import any goods or services, while 24% named at least one country that they import from. The breakdown of importers by size and sector is shown in chart Q38a below.

Q38a. Which countries, if any, do you import from?

<table>
<thead>
<tr>
<th>Sector</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABDE</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C-Manufacturing</td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F-Construction/Building/Renovation/Civil engineering etc.</td>
<td>38%</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G - Wholesale/Retail</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H - Transport/Storage</td>
<td>48%</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I - Food/Accommodation (e.g. restaurant/café/hotel/ B&amp;B/bar/pubs)</td>
<td>12%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>J - Information/ Communication</td>
<td>43%</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K - Finance</td>
<td>0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>L - Real estate</td>
<td>0%</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>M - Professional services (solicitors, architects etc.)</td>
<td>26%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N - Administrative services</td>
<td>37%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>P - Education</td>
<td>11%</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Q - Health (including social care)</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R - Arts &amp; entertainment (including sport &amp; leisure)</td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>S - Other services</td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 to 5</td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 to 10</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>11+</td>
<td>15%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016 Base: All respondents (494)
Significant differences between sub-groups

- The business types significantly more likely than others to be importers included:
  - The Boosted sectors of most interest to the Council (31% importing, vs 14% of others)
  - Those without a training plan or budget (27% importing)
  - Those with a UK-wide or international market reach (35% and 45% importing, respectively)
  - Those with a UK-wide or international supplier base (31% and 81% importing, respectively).

- Half of the businesses (50%) stated that most of their suppliers were based across the UK, though one in three (34%) stated that their supplier base was mainly Local.

- Fewer than one in 10 (8%) stated that most of their suppliers were based overseas.

Q39. Where do most of your suppliers come from?

![Suppliers Source Chart]

Source: Marketing Means 2016  
Base: All who gave a valid answer (466)

Significant differences between sub-groups

- The business types most likely to have most of their suppliers based overseas, in Europe or beyond, included:
  - Those in operation for 6-10 years (20% of whom had most of their suppliers overseas)
  - Those who saw their market reach as Europe or beyond (23% with most of their suppliers overseas)
  - Importers (25% of which had most of their suppliers overseas)
6.5 Business support

- Businesses were asked to confirm which of a list of business support services/providers they were aware of.

- A group of four organisations were by far the best known, each by well over half of businesses; the FSB, Southend-on-Sea Council, Essex Chamber of Commerce, and the University of Essex. No others were known to more than one in five businesses (at most 19%).

- When asked whether they found the business support services/providers that they were aware of to be useful to their business, for most of the services only around one in six of those businesses aware actually considered them to be useful. The exceptions were Southend-on-Sea Council, considered useful by far more, just over one in three (34%) of those aware of its services, and Pro Actions, considered useful by 49% of its smaller base of businesses aware of it.

  - For Southend-on-Sea Council, businesses’ comments confirmed that 47% of those aware had not actually used the Council’s business support services. Among those who had used the Council’s services, 65% found them useful.

Q40. Are you aware of any of the following business support services or providers?
Q41a. Do you find them (named provider) useful to your business or not?

### Graph

<table>
<thead>
<tr>
<th>Service/Provider</th>
<th>Aware of</th>
<th>Find useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Federation of Small Businesses</td>
<td>12%</td>
<td>66%</td>
</tr>
<tr>
<td>Southend-on-Sea Council</td>
<td>23%</td>
<td>66%</td>
</tr>
<tr>
<td>Essex Chamber of Commerce</td>
<td>10%</td>
<td>62%</td>
</tr>
<tr>
<td>University of Essex</td>
<td>10%</td>
<td>57%</td>
</tr>
<tr>
<td>Innovate UK</td>
<td>3%</td>
<td>19%</td>
</tr>
<tr>
<td>Invest Essex</td>
<td>1%</td>
<td>19%</td>
</tr>
<tr>
<td>Ignite</td>
<td>0%</td>
<td>11%</td>
</tr>
<tr>
<td>BEST GROWTH HUB</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Pro Actions</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>NWES</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>None of those</td>
<td>13%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016
Base: All respondents (494)

**Significant differences between sub-groups**

- The business types most likely to be aware of Southend-on-Sea Council as a business support service/provider included:
  - Those established in the last 5 years (77% aware of the Council as a business support service/provider)
Those with a training plan or budget (73% aware, compared with 64% among those with no training plan/budget)

The business types most likely to consider the Council’s business support service to be useful included:

- Those with a training plan/budget (72% of users finding the service to be useful)
- Those who had experienced recruitment difficulties (71% of users finding the service to be useful)
- Those with a local supplier base (85% of users finding the service to be useful)

- Just over one in five (22%) of the businesses interviewed stated that they were aware of any other business support services/providers.
- Nearly one in seven (15%) of the businesses interviewed stated that they had found another business support service/provider to be useful.
More than two-thirds of businesses (68%) were aware of some of the types of traineeships, work experience opportunities, or apprenticeships that are available. The proportions for each sector and size group are shown below.

**Q44. Are you aware of Traineeships, Work Experience opportunities, or Apprenticeships which are available?**

<table>
<thead>
<tr>
<th>Sector Description</th>
<th>Awareness Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL - Aware of Traineeships, Work Experience opportunities, or Apprenticeships</td>
<td>68%</td>
</tr>
<tr>
<td>ABDE - Agriculture, Mining, Energy production, Water supply</td>
<td>100%</td>
</tr>
<tr>
<td>C - Manufacturing</td>
<td>47%</td>
</tr>
<tr>
<td>F - Construction/Building/Renovation/Civil engineering etc.</td>
<td>66%</td>
</tr>
<tr>
<td>G - Wholesale/Retail</td>
<td>65%</td>
</tr>
<tr>
<td>H - Transport/Storage</td>
<td>58%</td>
</tr>
<tr>
<td>I - Food/Accommodation (e.g. restaurant/café/hotel/ B&amp;B/bar/pubs)</td>
<td>70%</td>
</tr>
<tr>
<td>J - Information/ Communication</td>
<td>96%</td>
</tr>
<tr>
<td>K - Finance</td>
<td>64%</td>
</tr>
<tr>
<td>L - Real estate</td>
<td>78%</td>
</tr>
<tr>
<td>M - Professional services (solicitors, architects etc.)</td>
<td>82%</td>
</tr>
<tr>
<td>N - Administrative services</td>
<td>86%</td>
</tr>
<tr>
<td>P - Education</td>
<td>65%</td>
</tr>
<tr>
<td>Q - Health (including social care)</td>
<td>71%</td>
</tr>
<tr>
<td>R - Arts &amp; entertainment (including sport &amp; leisure)</td>
<td>46%</td>
</tr>
<tr>
<td>S - Other services</td>
<td>76%</td>
</tr>
<tr>
<td>1 to 5</td>
<td>64%</td>
</tr>
<tr>
<td>6 to 10</td>
<td>80%</td>
</tr>
<tr>
<td>11+</td>
<td>86%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016, Base: All respondents (494)

**Significant differences between sub-groups**

- None of the differences by sector shown in the chart above are statistically significant.
- The business types significantly more likely than others to be aware of Traineeships, Work Experience opportunities, or Apprenticeships included:
  - Those employing 6-10 or 11+ staff (80% and 86% aware)
  - Those that are not family-run (75% aware)
Those with plans to relocate (83% aware)
Those with a training plan/budget (89% aware)
Those which had experienced recruitment difficulties (85% aware)
Those which employed an apprentice (97% aware)

Businesses were also asked whether there were any additional services that they thought the public sector, and Southend-on-Sea Council in particular, should provide to support their business. Two-thirds (67%) of businesses did not name any additional support services.

The most likely types of services to be named were relatively general; support for growing business was mentioned by 8% and advice for (improving) businesses by 6%, as well as sector/business specific help by 4%. Several specific aspects, each mentioned by fewer than 5%, included help with marketing, better grants/funding, better broadband, and improved training opportunities.

Q45. Are there any additional services that you think the public sector or Southend Borough Council should provide to support your business?

Source: Marketing Means 2016                        Base: All respondents (494)
The one-third of respondents who felt that the Council should offer some additional business support were also asked which areas of the Council’s services they needed advice on. The results are summarised in the chart below, and show that a wide range of services was mentioned, none by more than 9% of businesses. Nearly half however (46%) could not name any specific services.

Q46. What areas of the Council’s Services do you need advice on?

Source: Marketing Means 2016
Base: All who thought that the Council/ public sector should provide additional services to support business (160)
The one-third of respondents who felt that the Council should offer some additional business support were also asked whether they would be willing to pay for any of these services. Businesses were slightly more likely to disagree with this proposal, with 46% stating that they would not be willing while only 41% stated that they would be willing.

Q47. Would you be willing to pay for any of these (Council business support) services?

Source: Marketing Means 2016
Base: All who thought that the Council/ public sector should provide additional services to support business and gave a valid answer (156)

Significant differences between sub-groups

- The only business type significantly more likely than others to be willing to pay for such services was those that had a training plan/budget, 58% of whom were willing to pay, versus 34% of those with no such training plan/budget.
- The chart on the next page summarises the differences apparent by sector and size, though given the low base size, none are statistically significant.
Q47. Would you be willing to pay for any of these (Council business support) services? – BY SECTOR AND SIZE

**TOTAL - Willing to pay for Council business support services**

- **ABDE - Agriculture, Mining, Energy production, Water supply:** 22%
- **C - Manufacturing:** 67%
- **F - Construction/Building/Renovation/Civil engineering etc.:** 31%
- **G - Wholesale/Retail:** 0%
- **H - Transport/Storage:** 55%
- **I - Food/Accommodation (e.g. restaurant/café/hotel/ B&B/bar/pubs):** 72%
- **J - Information/ Communication:** 34%
- **K - Finance:** 47%
- **L - Real estate:** 10%
- **M - Professional services (solicitors, architects etc.):** 50%
- **N - Administrative services:** 25%
- **P - Education:** 67%
- **Q - Health (including social care):** 31%
- **R - Arts & entertainment (including sport & leisure):** 0%
- **S - Other services:** 41%
- **1 to 5:** 26%
- **6 to 10:** 36%
- **11+:** 54%

Source: Marketing Means 2016

Base: All who thought that the Council/ public sector should provide additional services to support business and gave a valid answer (156)
6.6 Tendering for public sector contracts

- Among all businesses, just over one in five (21%) stated that they had either quoted or tendered for a public sector contract in the past.

- Nearly one in three (31%) had not tendered or quoted for the public sector in the past but stated that they might consider doing so if support were available. Nonetheless, most of those who had not quoted/tendered for the public sector previously stated that they would not consider doing so.

Q48. Have you ever quoted or tendered for a public sector contract, i.e. in order to sell your products/services to the public sector?
Q49. Would you consider quoting or tendering for a public sector contract if there was support available to help you?

Significant differences between sub-groups

- A summary by sector and size of the proportion of businesses that had ever tendered/quoted for the public sector is shown on the next page.

- Businesses in the Wholesale/Retail, Finance and Real Estate sectors were significantly less likely than others to have done so (6%, 5% and 0% respectively).

- The business types significantly more likely than others to have tendered/quoted for public sector contracts included:
  - Family-run (24% had tendered/quoted)
  - Those with a training plan or budget (28% had tendered/quoted)
  - Those who had experienced recruitment difficulties (29% had tendered/quoted)
  - Those with a County-wide or UK-wide market reach (28% and 36% respectively had tendered).

- Businesses significantly more likely than others to consider public sector quoting/tendering if support were available included:
  - Those in the ‘Boosted’ industry sectors (35% would consider)
  - Those established for 1-5 years or 6-10 years (42% and 40% respectively would consider)
  - Those who have experienced recruitment difficulties (35% would consider)
  - Those who employ apprentices (41% would consider)
  - Those who import (40% would consider)
Those with an European/international supplier base (44% would consider)

Q48. Have you ever quoted or tendered for a public sector contract, i.e. in order to sell your products/services to the public sector? – BY SECTOR AND SIZE

<table>
<thead>
<tr>
<th>Sector Description</th>
<th>1 to 5</th>
<th>6 to 10</th>
<th>11+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Mining, Energy production, Water supply</td>
<td>20%</td>
<td>22%</td>
<td>30%</td>
</tr>
<tr>
<td>C-Manufacturing</td>
<td>23%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Construction/Building/Renovation/Civil engineering etc.</td>
<td>37%</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>Wholesale/Retail</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Transport/Storage</td>
<td>66%</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Food/Accommodation (e.g. restaurant/café/hotel/ B&amp;B/bar/pub, but NOT…</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Information/ Communication</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Finance</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Real estate</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Professional services (solicitors, architects etc.)</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Administrative services</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Education</td>
<td>23%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Health (including social care)</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Arts &amp; entertainment (including sport &amp; leisure)</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Other services</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Marketing Means 2016  
Base: All respondents (494)
7. Environmental Issues

In this section, we present the results of those questions that asked businesses about their transport plans and practices, and any plans in place for limiting or reducing their carbon emissions.

7.1 Transport

- Cars were by far the most likely primary method of transport to be used in the operation of the business, named by nearly three in every five businesses (58%).
- Just over a quarter (28%) used a Van as one of their primary transport methods, though far fewer used a Lorry/HGV (7%).

Q50. What, if any, are the primary methods of transport used in the operation of your business?

**Source:** Marketing Means 2016  
**Base:** All respondents (494)

**Significant differences between sub-groups**

- Manufacturing businesses were significantly more likely to use a Van (58%) or Lorry (28%) as a primary method of transport for their business.
- Construction/Building firms were much more likely to name a Van as a primary method of transport (61%).
- Wholesale/retail firms were less likely to use a Car (44%) but more likely than others to use a Van (42%)
- Other variations between business types included:
  - Those established for 6-10 years were more likely than others to use Air travel as a primary method (13% doing so)
  - Those with a European/international market reach were significantly more likely to use a Lorry (27%), Sea (26%) or Air (32%) as their primary transport method.
  - Similarly, Importers were also significantly more likely to use a Lorry (18%), Sea (7%) or Air (13%) as their primary transport method.
  - Those with a UK-wide supplier base were significantly more likely to use sea (5%) as a primary transport method. Those with a European/international supplier base were
significantly more likely to use a Lorry (24%), Sea (14%) or Air (29%) as a primary transport method.

- More than two-thirds of businesses (69%) stated that travel by Car was the main method of travel to work for their employees. Just over a quarter (26%) gave Walking as a main method. Only one in seven (15%) mentioned Bus and fewer than one in 10 (9%) mentioned Train.

**Q51. What are the main methods of travel to work used by your employees?**

![Bar chart showing the percentage of businesses using different modes of transport to work]

Source: Marketing Means 2016  
Base: All respondents (494)

**Significant differences between sub-groups**

- Those in the ‘Boosted’ industry sectors were significantly more likely than others to mention Cycling as one of their employees’ main transport methods (10%).
- Manufacturing businesses were significantly less likely to mention Walking as one of their employees’ main methods (only 9% doing so).
- Other variations between business types included:
  - Businesses with 11+ staff were significantly more likely to mention travel by Car (89%), Bus (36%) and Train (27%)
  - Those established for more than 10 years were more likely than others to name Car as a main method of travel to work (74% doing so)
  - Those at an HQ or at a branch with a UK HQ were significantly more likely to mention travel to work by Bus (33% and 35% respectively)
  - Those with plans to relocate were more likely to mention travel to work by Car (71%).
  - Those with a training plan or budget were more likely to mention Car (78%), Bus (22%) and Train (19%)
  - Those who employ apprentices were more likely to mention Bus (26%) and Train (17%)
  - Those with a European/international supply base were more likely to mention Cycling (21%)
• Fewer than one in 20 businesses (4%) stated that they had a travel plan in place. The chart below shows how this varies by business sector and size.

Q52. Does your business currently have a travel plan?

![Graph showing the percentage of businesses with travel plans by sector and size.]

Significant differences between sub-groups

– Businesses in the Real Estate sector were significantly more likely than others to have a travel plan (31%).

– Other business types significantly more likely than others to have a travel plan included:
  - Businesses with 11+ employees (16%)
  - Businesses in operation for more than 10 years (6%, vs 1% of younger businesses)
  - Businesses that had experienced recruitment difficulties (11%)
  - Businesses that employ apprentices (9%)
Businesses with UK-wide or European/international market reach (9% of each)

7.2 Carbon reduction measures

- Fewer than one in five businesses (19%) had any plans in place to undertake carbon reduction measures. The chart below shows how this varied by business sector and size.

Q53. Does your company have any plans to undertake carbon reduction measures?

### Significant differences between sub-groups
- Businesses in the Information/Communication sector were significantly more likely than others to have plans for carbon reduction measures (53%).
– Other business types significantly more likely than others to be planning carbon reduction measures included:

- Businesses with 11+ employees (41%)
- Businesses with a training plan/budget (36%)
- Those that have experienced recruitment difficulties (35%)
- Those with a UK-wide market reach (30%)
8. Broadband

- Just over three-quarters of businesses (77%) stated that their business was reliant on broadband coverage. The chart below shows how this varied by business sector and size.

Q54. Is your business reliant on broadband coverage?

Significant differences between sub-groups
- 100% of businesses in several sectors shown in the chart above stated that they were reliant on broadband coverage. Those in Administrative Services were also significantly more likely than others to be reliant (96%).
- Other business types significantly more likely than others to be reliant on broadband included:
  - Those with a training plan/budget (87%)
Those with a market reach beyond only Local, i.e. County/UK/ Europe etc. (87%)

- Just over three-quarters of businesses (77%) stated that the broadband service that they currently had was sufficient for their current and immediate future needs. The chart below shows how this varied by business sector and size.

Q55. Is the broadband service that you currently have sufficient for your current and immediate future needs?

**Significant differences between sub-groups**
- Businesses in the Information/communication sector included the highest proportion with sufficient broadband coverage, though there were no statistically significant differences in the proportions of businesses that did or did not claim to have sufficient coverage.

Source: Marketing Means 2016  
Base: All respondents (494)
– Business types significantly more likely than others not to have sufficient broadband coverage included:
  - Those with plans to relocate (29%, vs 14% of others, did not feel they had sufficient broadband coverage)
  - Those that had experienced recruitment difficulties (23% vs 14% of others)
9. Corporate Social Responsibility and further research

- The survey questionnaire closed with several questions relating to corporate social responsibility (CSR). As shown in the chart below, slightly less than one in six businesses (16%) had a CSR policy.
- Businesses were more likely to have links with the local community or local charities, with nearly half (46%) stating this. A further 16% had no such current links but stated that they would like support from the Council to develop them.
- Finally, just over three-quarters of the businesses interviewed for the survey stated that they would be happy to be re-contacted for further research conducted by the Council.

Q56. Do you have a Corporate Social Responsibility (CSR) policy?
Q57. Do you have links with the local community or local charities?
Q57a. Would you like to receive support or guidance from the Council to help develop those links?
Q58. Southend-on-Sea Borough Council may be conducting some further research on this topic or related topics in the future. Would you be happy (to be re-contacted)?

Source: Marketing Means 2016                        Base: All respondents (494)

Significant differences between sub-groups
- Business types significantly more likely than others to have a CSR policy included:
  - Business sectors other than those specially ‘Boosted’ in the sample (20%, vs 13% among the Boosted group)
  - Businesses with 11+ staff (36%)
  - Those with a training plan or budget (37%)
  - Those who had experienced recruitment difficulties (35%)
  - Those who employ apprentices (33%)
  - Those with a UK-wide market reach (26%)
- Business types significantly more likely than others to have links with local charities and/or the local community included:
  - Business sectors other than those specially ‘Boosted’ in the sample (20%, vs 13% among the Boosted group)
  - Businesses with 11+ employees (70%)
  - Those with a training plan or budget (68%)
  - Those who had experienced recruitment difficulties (56%)
  - Those who employ apprentices (65%)
  - Those for whom tourism was important (62%)

- Business types significantly more likely than others to be interested in Council support to help make links with local charities and/or the local community included:
  - Business sectors other than those specially ‘Boosted’ in the sample (41%, vs 27% among the Boosted group)
  - Businesses in operation for 6-10 years (51% interested in Council support to make community/charity links)
Appendix 1: Questionnaire

SOSBC001 – SOUTHEND BUSINESS SURVEY 2016
Fieldwork by Marketing Means in February & March 2016

Q1. Can I just check, are you a...
READ OUT OPTIONS. CODE ONE ONLY.

Private business
Public sector organisation
Or a voluntary/non profit-making business?
[DO NOT READ OUT] Don’t know/ Refused

Q2. How many years has your business been in operation?
CODE ONE ONLY.

Less than a year
1-5
6-10
More than 10 years
[DO NOT READ OUT] Don’t know/ Refused

Q3. What sector is your business in?
READ OUT OPTIONS, IF NECESSARY. CODE ONE ONLY.

Tourism
Business Support
Medical Technology
Aviation
Manufacturing
Retail
Creative and Cultural
Fishing
Other : (Please specify)
[DO NOT READ OUT] Don’t know/ Refused

Q4. Has the business always operated from this location?
CODE ONE ONLY.

Yes
No
[DO NOT READ OUT] Don’t know/ Refused
Q5. How many years has your company been in operation at this location?  

CODE ONE ONLY.

- Less than a year  O
- 1-5  O
- 5-10  O
- More than 10 years  O
- [DO NOT READ OUT] Don’t know/ Refused  O

Q6. What is the main business activity of your organization on the whole, not necessarily at this site? What do you make or what services do you provide?

Probe for relevant detail:
- If they manufacture – product type, product function and what materials are used
- If they sell a product – product type and whether it’s sold retail or wholesale
- If they transport – mode of transport (land, air, water etc)

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Q7. How many staff are employed at this site? Please include all paid staff including yourself. Please exclude outside contractors/agency staff, and anyone self-employed, except the self-employed owner.

TYPE IN NUMBER BELOW

________________________________________________________________________

Q8. How many of these are full-time staff, i.e. those working at least 30 hours per week?

TYPE IN NUMBER BELOW

Full time (30hrs or more) __________________________________________________________________________

Q9. And how many are part-time staff, i.e. those working less than 30 hours per week?

Please include all part-time paid staff including yourself if appropriate.

TYPE IN NUMBER BELOW

Part time (less than 30hrs) __________________________________________________________________________
Q10. Is the business.......?
READ OUT. CODE ONE ONLY.

UK-owned  O
Foreign-owned  O
[DO NOT READ OUT] Don’t know/ Refused  O

Q11. Is the business site.......?
READ OUT OPTIONS. CODE ONE ONLY.

A single site business  O
A Headquarters  O
A branch, subsidiary or division, with UK Headquarters  O
A branch, subsidiary or division, with International Headquarters  O
[DO NOT READ OUT] Don’t know/ Refused  O

Q12. Is the business a franchise?
CODE ONE ONLY.

Yes  O
No  O
Don’t know  O

Q13. Is the business a family-run business?
CODE ONE ONLY.

Yes  O
No  O
Don’t know  O
Q14. Are any of the following negative factors impacting on the performance of your business?

**READ OUT LIST. CODE ALL THAT APPLY.**

- Low profitability of sector [ ]
- Limited demand in principal product areas [ ]
- Increasing competition [ ]
- Difficulties in acquiring or implementing new technology [ ]
- Availability / cost of finance [ ]
- Lack of skilled labour [ ]
- High cost of labour [ ]
- High cost of local housing [ ]
- High cost of energy [ ]
- Constraints with premises or location [ ]
- Difficulty in obtaining planning permission [ ]
- Poor public transport [ ]
- Parking (costs and availability) [ ]
- Local traffic congestion [ ]
- Exchange rates [ ]
- Business rates [ ]
- Bureaucracy [ ]
- Lack of external support and advice [ ]
- Other : (Please specify) [ ]

[DO NOT READ OUT] None of the above [ ]

Q15. Are there any other factors impacting on the performance of your business?

**CODE ONE ONLY.**

- Yes: (Please specify) O ____________________________
- No O
Q16. More specifically, are there any limitations to your business by being located in Southend?

[NOTE: WE MEAN THE BOROUGH OF SOUTHEND-ON-SEA, WHICH INCLUDES LEIGH-ON-SEA, SHOEBURYNESS, WESTCLIFF-ON-SEA, AND OTHER AREAS AND SUBURBS]

READ OUT LIST. CODE ALL THAT APPLY.

- Limited demand in principal product areas
- Increasing competition
- Difficulties in acquiring or implementing new technology
- Availability / cost of finance
- Lack of skilled labour
- High cost of labour
- High cost of local housing
- High cost of energy
- Constraints with premises or location
- Difficulty in obtaining planning permission
- Poor public transport
- Parking (costs and availability)
- Local traffic congestion
- Business rates
- Bureaucracy
- Lack of external support and advice
- Other : (Please specify)

[DO NOT READ OUT] None of the above

Q17. Are there any other limitations to your business by being located in Southend?

CODE ONE ONLY.

Yes: (Please specify) O

No

Q18. Does your business have any plans to move away from its current location in Southend in the next two to three years?

CODE ONE ONLY.

Yes O

No O
Q18a. Where do you plan to move to?
TYPE IN BOX BELOW

________________________________________
________________________________________
________________________________________

Q19. What are the main reasons you are planning to move from your current location?
TYPE IN BOX BELOW

________________________________________
________________________________________
________________________________________

Q20. How satisfied or dissatisfied are you overall with Southend Borough as a location for investment?
CODE ONE ONLY.
CLARIFY 'Very' OR 'Fairly' IF NECESSARY

<table>
<thead>
<tr>
<th>Option</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very satisfied</td>
<td>O</td>
</tr>
<tr>
<td>Fairly satisfied</td>
<td>O</td>
</tr>
<tr>
<td>Neither satisfied nor dissatisfied</td>
<td>O</td>
</tr>
<tr>
<td>Fairly dissatisfied</td>
<td>O</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>O</td>
</tr>
<tr>
<td>Don’t know</td>
<td>O</td>
</tr>
</tbody>
</table>

Q20a. Why do you say that?
TYPE IN BOX BELOW. PROBE FULLY

________________________________________
________________________________________
________________________________________
Q21. What do you consider to be the best things about living and working in Southend? DO NOT READ OUT LIST. CODE ALL THAT APPLY.

Location [ ]
Transport [ ]
Low wages [ ]
Staff [ ]
Skills [ ]
Other : (Please specify) [ ]

______________________________

[DO NOT READ OUT] Don’t know/ Refused [ ]

Q22. Have you identified any of the following skills gaps in your current workforce? READ OUT OPTIONS BELOW. CODE ALL THAT APPLY.

Numeracy and Literacy skills [ ]
Communication skills [ ]
Customer service skills [ ]
Basic computer literacy skills [ ]
Foreign language skills [ ]
Strategic / management skills [ ]
Advanced IT or software skills [ ]
High level technical skills [ ]
School leavers or college/university graduates with appropriate skills and attitude to work [ ]
Other : (Please specify) [ ]

______________________________

[DO NOT READ OUT] None of the above [ ]

Q23. Does your company have a...........? CODE ALL THAT APPLY.

Training budget [ ]
Training plan [ ]
Neither of the above [ ]
[DO NOT READ OUT] Don’t know/ Refused [ ]
Q24. Have you had recruitment difficulties in the past 12 months?  
CODE ONE ONLY.  
   Yes  O  
   No  O  

Q24a. What types of skills or jobs have you had recruitment difficulties for?  
TYPE IN BOX BELOW

________________________________________  
________________________________________

Q25. Are there any other types of skills or jobs that you have had recruitment difficulties for?  
CODE ONE ONLY.  
   Yes [TYPE IN BELOW]  O  
________________________________________  
   No  O  
   [DO NOT READ OUT] Don’t know/ Refused  O

Q26. Do you currently employ anyone on a government-approved apprenticeship programme?  
CODE ONE ONLY.  
   Yes  O  
   No  O  
   [DO NOT READ OUT] Don’t know/ Refused  O

Q27. Do you have any plans to take on an apprentice in the next 12 months?  
CODE ONE ONLY.  
   Yes  O  
   No  O  
   [DO NOT READ OUT] Don’t know/ Refused  O
Q28. Do you anticipate that you will be in a position to offer your current or potential apprentices a job on completion of the apprenticeship?
CODE ONE ONLY.
Yes ○
No ○
[DO NOT READ OUT] Don’t know/ Refused ○

Q28a. Why do you say that?
TYPE IN BOX BELOW. PROBE FULLY


Q29. Would you be interested in taking on an apprentice if there was support available to help you do this?
CODE ONE ONLY.
Yes ○
No ○
[DO NOT READ OUT] Don’t know/ Refused ○

Q29a. Why do you say that?
TYPE IN BOX BELOW. PROBE FULLY


Q30. How important are each of the following aspects to your business operation?
CODE ONE PER ROW ONLY.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Important</th>
<th>Fairly important</th>
<th>Not very important</th>
<th>Not at all important</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Highways</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Parking</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Lifestyle</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Staffing</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Skills</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

Q31. Are there any other important aspects to your business operation?
CODE ONE ONLY.
Yes: (Please specify) ○


Q32. How important is tourism to the success of your business?

**CODE ONE ONLY.**

- Very important: 0
- Fairly important: 0
- Not very important: 0
- Not at all important: 0
- Don’t know: 0

Q33. Looking forward over the next 6–12 months, how do you expect your business to perform in terms of the following aspects?

Do you expect each one to increase, decrease or stay the same?

**READ OUT LIST. CODE ONE ANSWER ONLY PER ROW.**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Increase</th>
<th>Decrease</th>
<th>Remain the same</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing levels</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Turnover</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Stock levels</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Access to finance</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Investment in business</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other – [TYPE IN BELOW]</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Q33a. Which other aspect do you mean?

________________________________________
________________________________________

Q34. Are there any other factors which could have a positive impact on your business performance over the next 6-12 months?

**CODE ONE ONLY.**

- Yes: (Please specify) 0

________________________________________

No 0

Q35. Are there any other factors which could have a negative impact on your business performance over the next 6-12 months?

**CODE ONE ONLY.**

- Yes: (Please specify) 0

________________________________________

No 0
Q36. What is the market “reach” of your business, i.e. the area in which most of your customers are based?

CODE ONE ONLY.

Local  O
County-wide  O
UK-wide  O
European-wide  O
Internationally-wide (beyond just Europe)  O
[DO NOT READ OUT] Don’t know/Refused  O

Q36a. To which countries does your company export?

TYPE IN BELOW

________________________________________
________________________________________

Q37. Do you use any of the following international/trade bodies?

CODE ALL THAT APPLY.

UKTI  []
United Nations Department of Economic and Social Affairs  []
Organisation for Economic Cooperation and Development (OECD)  []
The Federation of International Trade Associations  []
Export UK  []
None of the above  []

Q37a. Are there any other international/trade bodies that you use?

CODE ONE ONLY.

Yes: (Please specify)  O

________________________________________

No  O
[DO NOT READ OUT] Don’t know/Refused  O

Q38. Would you consider exporting if you received suitable advice?

CODE ONE ONLY.

Yes  O
No  O
[DO NOT READ OUT] Don’t know/Refused  O
Q38a. Which, if any countries do you import from?  
**CODE ONE ONLY.**  
Countries named: (Please specify) O  
________________________________________  
None O  
[DO NOT READ OUT] Don’t know/ Refused O

Q39. Where do most of your suppliers come from?  
**READ OUT OPTIONS IF NECESSARY. CODE ONE ONLY.**  
Local O  
County-wide O  
UK-wide O  
European-wide O  
Internationally-wide (beyond just Europe) O  
[DO NOT READ OUT] Don’t know/ Refused O

Q40. Are you aware of any of the following business support services or providers?  
**READ OUT LIST, CODING ANY THAT APPLY BEFORE MOVING ON TO READ OUT THE NEXT.**  
BEST GROWTH HUB [ ]  
NWES [ ]  
Southend-on-Sea COUNCIL [ ]  
Invest Essex [ ]  
Ignite [ ]  
Pro Actions [ ]  
University of Essex [ ]  
Innovate UK [ ]  
Essex Chamber of Commerce [ ]  
The Federation of Small Business [ ]  
None of those [ ]

Q41a. Do you find ... **BEST GROWTH HUB** ... useful to your business or not?  
**CODE ONE ONLY.**  
Yes - Why do you say that? O  
________________________________________  
No - Why do you say that? O  
________________________________________

... **REPEAT Q41a etc. FOR EACH SERVICE CODED AT Q40**
Q42. Are you aware of any other business support services or providers?  
**CODE ONE ONLY.**  
Yes: (Please specify) O  
[ ]  
No O  
[ ]  

Q43. Are there any other business support services or providers that you find useful?  
**CODE ONE ONLY.**  
Yes: (Please specify) O  
[ ]  
No O  
[ ]  
[DO NOT READ OUT] Don’t know/ Refused O  
[ ]  

Q44. Are you aware of Traineeships, Work Experience opportunities, or Apprenticeships which are available?  
**CODE ONE ONLY.**  
Yes O  
[ ]  
No O  
[ ]  

Q45. Are there any additional services that you think the public sector or Southend Borough Council should provide to support your business?  
**DO NOT READ OUT. CODE ALL THAT APPLY.**  
Support for growing business [ ]  
Advice for businesses (or for improving business) [ ]  
Other: (Please specify) [ ]  
[ ]  
No – no additional services required [ ]  
[ ]  

Q46. What areas of the Council’s Services do you need advice on?  
**DO NOT READ OUT UNLESS YOU NEED TO CLARIFY THEIR ANSWER. CODE ALL THAT APPLY (as specifically as possible) BELOW:**  
Health and safety at work [ ]  
Pollution/environmental issues [ ]  
Product safety [ ]  
Pest control [ ]  
Food Safety [ ]  
Quality Standards [ ]  
Fair Trading [ ]  
Animal Health & Disease control [ ]  
Other (TYPE IN BELOW) [ ]  
[ ]  
[DO NOT READ OUT] Don’t know/ Refused [ ]
Q46a1. Which of these types of Health and safety at work does that relate to?

**READ OUT OPTIONS. CODE ALL THAT APPLY.**
- Investigation of accidents [ ]
- Inspection/audit of work place [ ]
- Advice on compliance and regulations [ ]
- Other [ ]

Q46a2. Which of these types of Pollution/environmental issues does that relate to?

**READ OUT OPTIONS. CODE ALL THAT APPLY.**
- Air quality/ensuring clean air [ ]
- Contaminated land [ ]
- Reports for planning applications [ ]
- Advice for planning applications [ ]
- Permitting of industrial processes [ ]
- Other [ ]

Q46a3. Which of these types of Product safety does that relate to?

**READ OUT OPTIONS. CODE ALL THAT APPLY.**
- Advice about how to ensure products are safe [ ]
- Advice regarding supply of goods if faulty [ ]
- Other [ ]

Q46a4. Which of these types of Food safety does that relate to?

**READ OUT OPTIONS. CODE ALL THAT APPLY.**
- Food hygiene inspections/audit [ ]
- Food business registrations [ ]
- Food hygiene rating system [ ]
- Providing advice on compliance with regulations [ ]
- Other [ ]

Q46a5. Which of these types of Quality Standards does that relate to?

**READ OUT OPTIONS. CODE ALL THAT APPLY.**
- Food labelling [ ]
- Food composition [ ]
- Export advice [ ]
- Other [ ]
Q46a6. Which of these types of Fair Trading does that relate to?  
READ OUT OPTIONS. CODE ALL THAT APPLY.
- Business scams and frauds [ ]
- Online shopping [ ]
- Supply of goods if faulty [ ]
- Pricing [ ]
- Understanding Terms & Conditions [ ]
- Other [ ]

Q46a7. Which of these types of Animal Health and Disease Control does that relate to?  
READ OUT OPTIONS. CODE ALL THAT APPLY.
- Inspection of farms and livestock markets [ ]
- Providing advice regarding animal welfare on farms [ ]
- Information and advice regarding traceability and movement of animals [ ]
- Other [ ]

Q47. Would you be willing to pay for any of these services?  
CODE ONE ONLY
- Yes O
- No O

Q48. Have you ever quoted or tendered for a public sector contract, i.e. in order to sell your products/services to the public sector?  
CODE ONE ONLY
- Yes O
- No O
- [DO NOT READ OUT] Don’t know/ Refused O

Q49. Would you consider quoting or tendering for a public sector contract if there was support available to help you?  
CODE ONE ONLY
- Yes O
- No O
- [DO NOT READ OUT] Don’t know/ Refused O
Q50. What, if any, are the primary methods of transport used in the operation of your business?
CODE ALL THAT APPLY
Car [ ]
Van [ ]
Lorry [ ]
Sea [ ]
Air [ ]
Other [ ]
[DO NOT READ OUT] Don’t know/ Refused [ ]

Q51. What are the main methods of travel to work used by your employees?
CODE ALL THAT APPLY
Walk [ ]
Cycle [ ]
Car [ ]
Car Share [ ]
Bus [ ]
Coach [ ]
Train [ ]
Air [ ]
Other [ ]
[DO NOT READ OUT] Don’t know/ Refused [ ]

Q52. Does your business currently have a travel plan?
CODE ONE ONLY
Yes O
No O
[DO NOT READ OUT] Don’t know/ Refused O

Q53. Does your company have any plans to undertake carbon reduction measures?
CODE ONE ONLY
Yes O
No O
[DO NOT READ OUT] Don’t know/ Refused O

Q54. Is your business reliant on broadband coverage?
CODE ONE ONLY
Yes O
No O
[DO NOT READ OUT] Don’t know/ Refused O
Q55. Is the broadband service that you currently have sufficient for your current and immediate future needs?

**CODE ONE ONLY**

- Yes: O
- No: O
- [DO NOT READ OUT] Don’t know/ Refused: O

Q56. Do you have a corporate Social Responsibility Policy?

**CODE ONE ONLY**

- Yes: O
- No: O
- [DO NOT READ OUT] Don’t know/ Refused: O

Q57. Do you have links with the local community or local charities?

**CODE ONE ONLY**

- Yes: [TYPE BELOW WHICH COMMUNITY ORGANISATIONS/ CHARITIES THEY’RE LINKED WITH]
  __
- No: O
- [DO NOT READ OUT] Don’t know/ Refused: O

Q57a. Would you like to receive support or guidance from the Council to help develop those links?

**CODE ONE ONLY**

- Yes: O
- No: O

Q58. Southend-on-Sea Borough Council may be conducting some further research on this topic or related topics in the future. Would you be happy for someone from the Council or their appointed research contractor to re-contact you using the information you have provided today and invite you to participate in that research?

**CODE ONE ONLY**

- Yes: O
- No: O

Q59. Would you be willing for the answers you’ve given today to be passed back to the Council together with your company name or would you prefer your answers to remain anonymous?

**CODE ONE ONLY**

- Yes – happy for answers to be linked to company: O
- No - prefer to remain anonymous: O
Q60. Please could I make a note of your name, as well as a telephone number or email address?

Name

Telephone number

Email

That's the end of the interview. Thank you very much for your time.

I've been calling from Marketing Means, an independent market research agency, on behalf of Southend-on-Sea Borough Council.

If you have any queries, or if you'd like to check the validity of the survey, you can contact either:

- Marketing Means on 0800 849 8014,

OR

- The Market Research Society on 0500 39 69 99 (free of charge).

THANK YOU AGAIN FOR YOUR TIME TODAY.