



**SDC SNAPSHOT BUSINESS
SURVEY
MARCH 2021**

FINAL REPORT

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STRATFORD-ON-AVON DISTRICT COUNCIL SNAPSHOT BUSINESS SURVEY RESULTS 2021

1.0 BACKGROUND

This consultation was designed to gather information from businesses across the district about their current position and to ascertain what effect the Covid-19 pandemic and associated lockdowns had had on businesses. This information would be used by Stratford-on-Avon District Council in planning short and longer-term policies to support business in the district.

The survey explored how businesses had adapted to the changing conditions brought about by the Covid-19 pandemic, whether they had received financial or other support, how they felt the Council had supported them during this period and how we could improve on this, plus how positive businesses felt about the future.

2.0 METHODOLOGY

The survey was undertaken in-house by the SDC Consultation Unit and took the form of an online questionnaire.

Businesses were invited to complete the online questionnaire via a link. The survey was advertised widely through usual SDC communication channels and via a number of business fora. This included the SDC Business Sounding Board.

The online survey was open for completion between 4th March and 31st March 2021.

221 surveys were completed in total.

3.0 SUMMARY OF RESULTS

About your business

Business sizes responding reflected the nature of businesses across the District as a whole, with the majority being micro-businesses or sole trader/self-employed. Just under half were located in Stratford-upon-Avon; most others were spread across the District, with a small number further afield. Over half responding were 10 years old or over. Responses were received across the sectoral spread with retail the most represented category (20%).

Effects of the pandemic

The majority of businesses had been affected by the pandemic negatively, with just over half having to implement a temporary business closure. Under half had furloughed staff, while a third taken active cash flow measures, taken on debt/equity and increased working flexibility for staff. Three responses said that they had shut their business permanently.

Financial Support Schemes

Just over half of businesses had received a grant when they had closed due to Government restrictions during lockdown, or due to Tier 3 or 4 measures. 20% of businesses had also received a Discretionary Grant. Most businesses who did not receive a grant said that this was because they were not eligible.

Stratford-on-Avon District Council

64% felt that SDC's response to the pandemic had been fairly or very good. Only 6% rated it fairly/very poor. Those responding suggested they would have wanted better communication, more financial support, rates relief/rent holiday and better engagement on SDC's part with the business community.

Next six months

57% businesses felt fairly or very positive about the next six months. 20% however felt fairly or very negative. Main concerns included attracting customers, further lockdowns or restrictions to their business, loss of business, and money worries. Of the measures which businesses felt may be necessary over the next six months, active cash flow and diversified product/service were the most possible for over a third of businesses, with taking on debt and changing business operations possible for a quarter of businesses.

Recovery

Of the possible ways to assist recovery, most businesses (65%) felt additional Government financial support would help. Promotion/marketing advice and networking opportunities were also popular, with 39% businesses each selecting these. Other ideas included further funding/money, rates relief, networking, easing of planning or bureaucracy and no further lockdowns or restrictions.

Workplace

Just under half responses said that they were working from home or from a business premises other than an office. Most businesses were not looking to change their workplace situation in the short to medium term. Of those who were, requirements covered a range of sizes, accommodating anything from 0-15 staff in a number of different locations in the district. A number of responses (22) said that they would be interested in hot-desking/co-working space. Of these, most felt a location in Stratford-upon-Avon was best (either town centre or out-of-centre), with most likely usage to be several times a week. For most businesses, they were looking at doing this within the next six months or after lockdown.

4.0 RESULTS IN DETAIL

This report contains details of the survey results in the same order in which the questionnaire was designed.

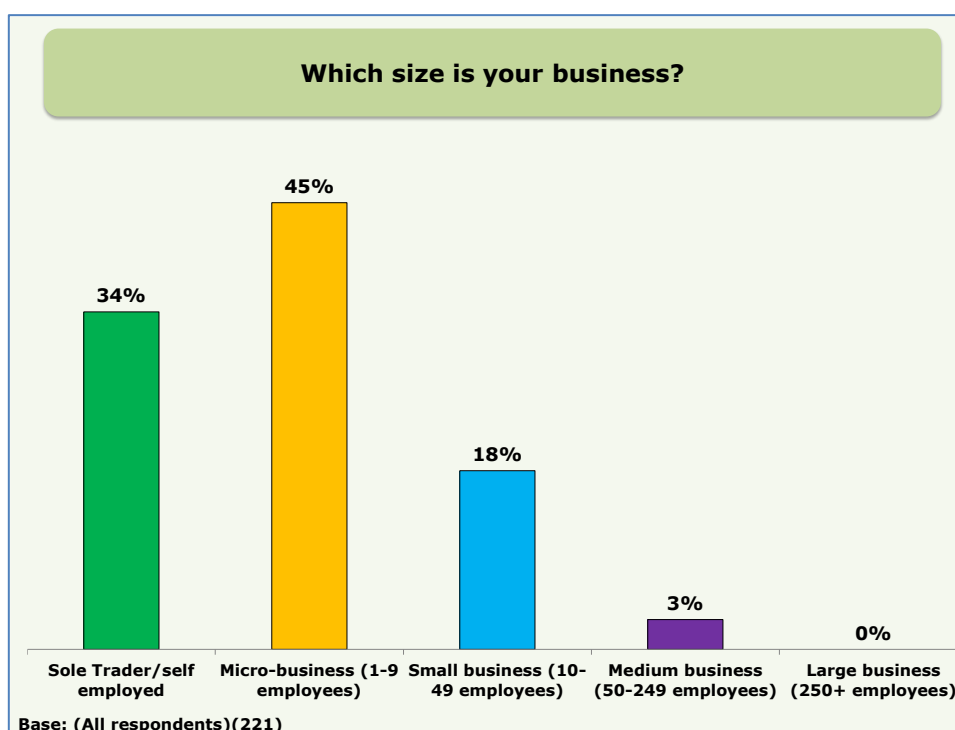
The term "base" in the tables and graphs refer to the number of responses to a particular question.

4.1 About your business

Which size of business are you?

The majority of businesses (79%) classed themselves as either micro-businesses (between 1-9 employees/workers) or sole trader/self-employed. Just under half fell into the micro-business category (45%).

Figure 1: Which size of business are you?

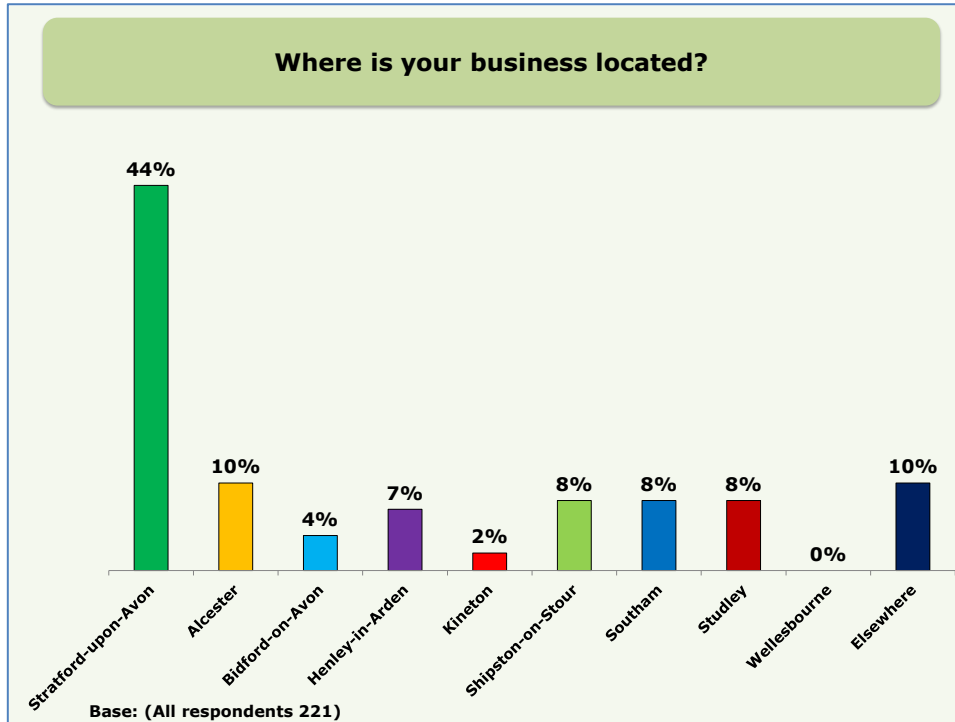


Where is your business located?

Just under half of businesses (44%) said that they were based in Stratford-upon-Avon. Otherwise, businesses were well-spread across the district.

Of the 37 responses which said 'elsewhere', two thirds of the locations were in villages within the District, while a third were elsewhere, mainly in Coventry/Warwick District.

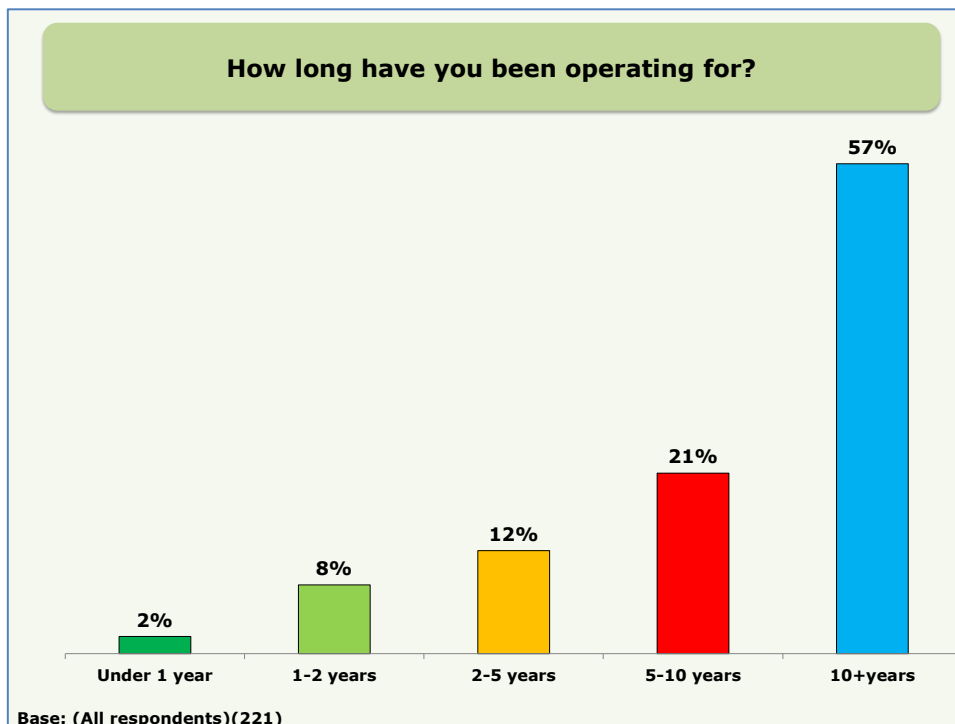
Figure 2: Where is your business located?



How long have you been operating for?

Just under six in ten businesses who responded (57%) had been operating for over ten years. Very few who replied were less than a year old.

Figure 3: How long have you been operating for?



What are the main business activities at this location?

The most popular business activity was retail, with 43 respondents (20%) stating this. 17% of businesses were in the tourism, leisure & Hospitality industry and 16% were in the business and professional service sector.

Figure 4: What are the main business activities at this location?



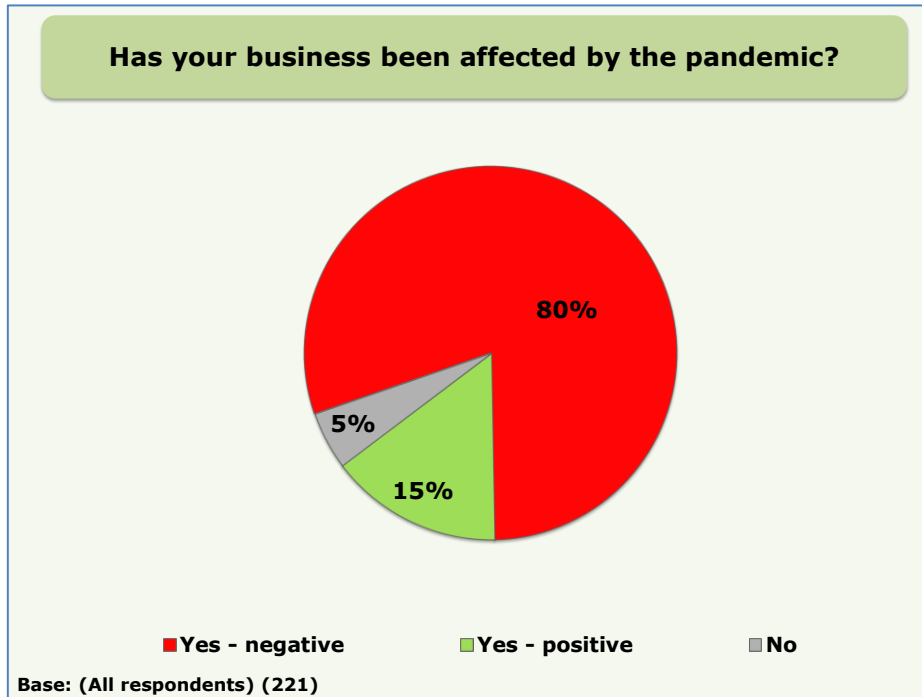
32 responses relating to 'other' were received. These included 7 beauty-related/personal care businesses; other businesses were across a range of different sectors.

4.2 Effects of the Pandemic

Has your business been affected by the Covid-19 pandemic?

The vast majority of responses (80%) said that the pandemic had affected them negatively, with 15% answering in a positive way.

Figure 5: Has your business been affected by the Covid-19 pandemic?



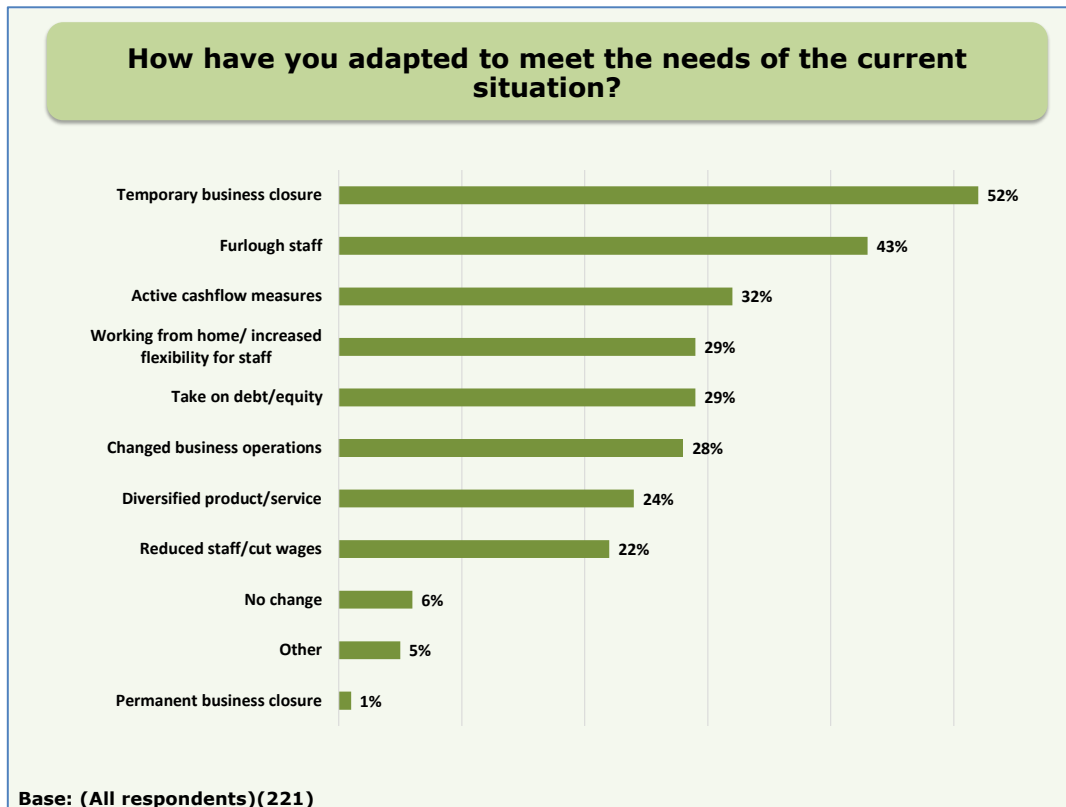
How have you adapted to meet the needs of the current situation?

Over half of the businesses who responded (52%) said that they had implemented a temporary business closure, while just under half (43%) had furloughed staff. A third (32%) had used active cash-flow measures.

Three businesses said that they had permanently closed their business.

23 responses relating to 'other' were received. These included receiving a Bounce Back Loan, reducing opening hours, restructuring the business and delaying employment of new staff.

Figure 6: How have you adapted to meet the needs of the current situation?

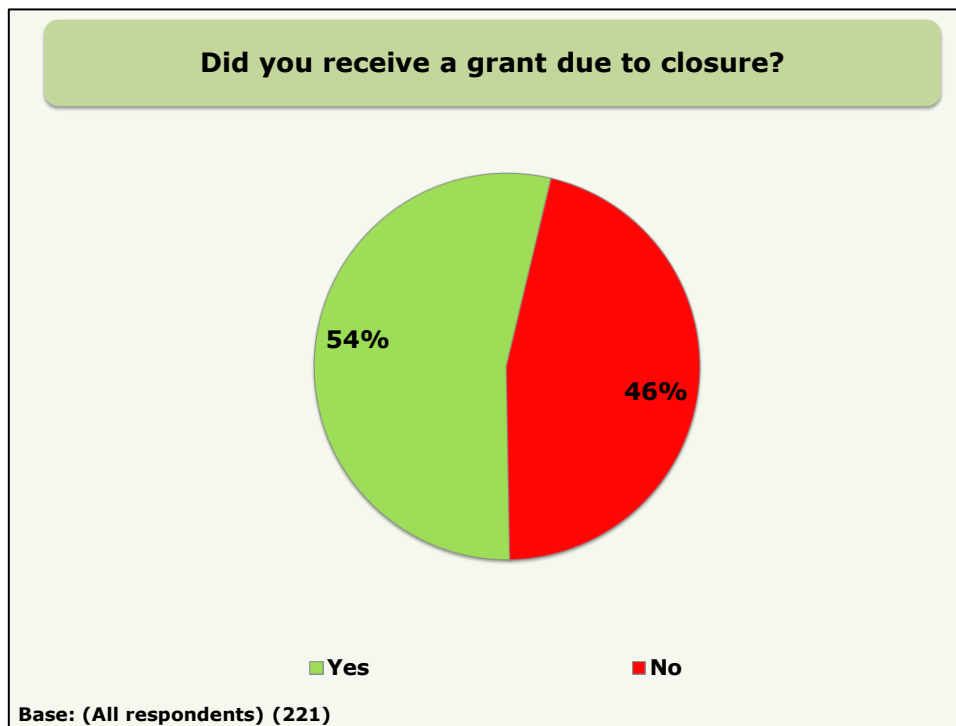


4.3 Financial Support Schemes

Did you get a grant as your business was forced to close due to Government restrictions during lockdown or whilst the district was in Tier 3 or 4?

Just over half of businesses who responded (54%) said that they had received a grant.

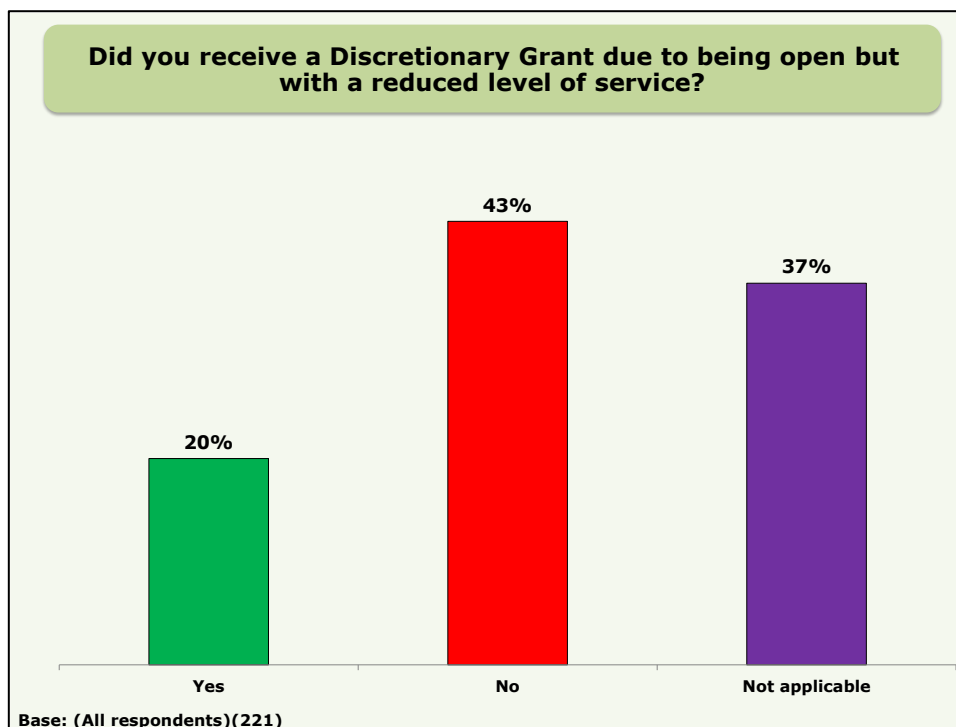
Figure 7: Did you receive a grant due to closure in lockdown/Tier 3 or 4?



Did you get a Discretionary grant as your business remained open but was only able to provide a reduced level of service? e.g. takeaway instead of serving indoors (restaurant)

41 businesses (20%) received the Discretionary Grant, whilst 43% did not. For 37% it was not applicable.

Figure 8: Did you receive a Discretionary Grant?

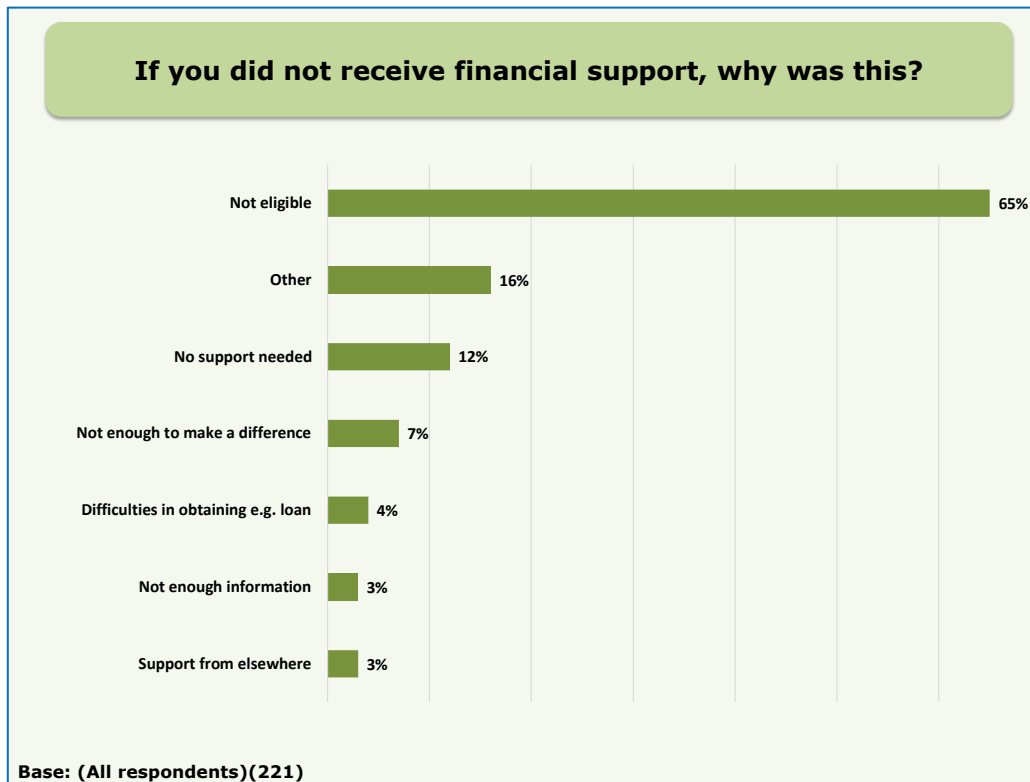


If you did not receive financial support, why was this?

Of those businesses who did not receive financial support, 59 (65%) said that it was because they were not eligible. 12% of respondents did not require any support.

Only three businesses responded that they did not receive financial support because there was not enough information.

Figure 9: If you did not receive financial support, why was this?



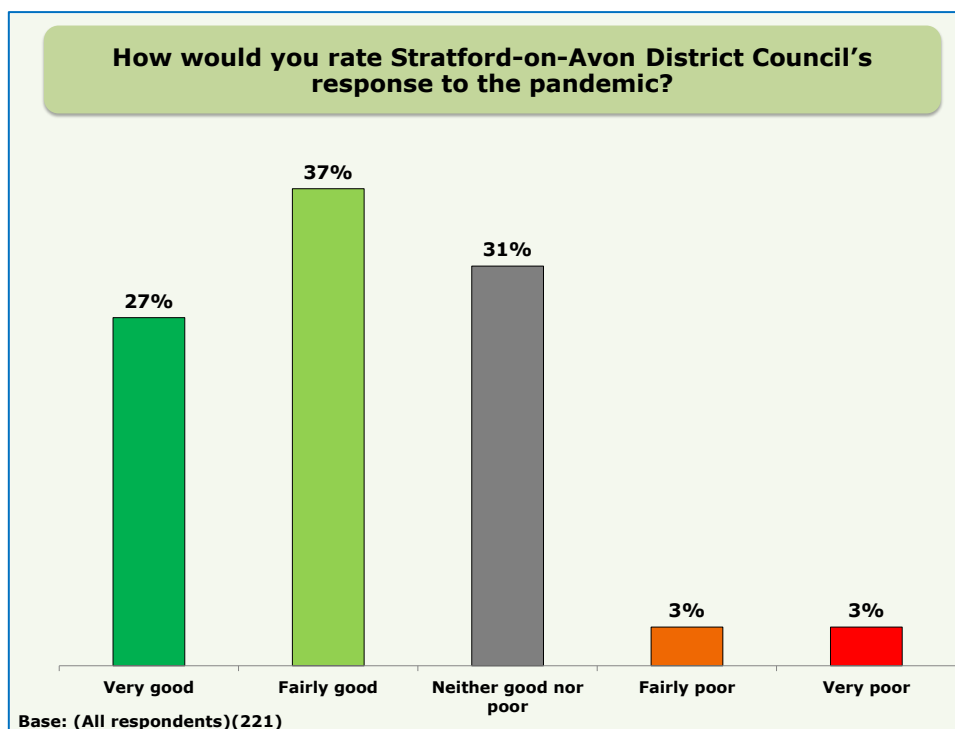
29 responses were received in relation to 'other'. These included working from home rather than from a premises, the young age of the business (under 1 year old with no company accounts), lack of support from the local authority, and receiving the SEISS grant.

4.4 Stratford-on-Avon District Council

In terms of business, how would you rate Stratford-on-Avon District Council's response to the pandemic?

64% of respondents felt that the Council's response to the pandemic had been very or fairly good, while 6% rated it poor or very poor.

Figure 10: How would you rate Stratford-on-Avon District Council's response to the pandemic?



What else would you have liked Stratford District Council to have done for business in the district in response to the pandemic?

88 responses were received. A number of key themes came out of these comments, which are summarised in Table 1 below.

The most mentioned topic was that of **better communication** from SDC to businesses about what they were entitled to, and how to access the different forms of financial support available to them, not just ones delivered by SDC. Some mentioned more clarity in emails, faster response and providing *more* in the way of communication.

Second most popular was around needing more **financial support**. Many of these said that they needed financial support as they had not received any so far, or needed more.

Seven responses said that they would have liked to have received **rates relief** or a rates holiday, and two would have liked a **rent holiday**.

Better **engagement** by SDC with the business community was mentioned in a number of responses. Ideas included having an online business forum, and an SDC representative to engage with businesses and champion local business.

A number of responses mentioned 'the town centre', and how they would like to see measures to support and improve the **high street**. **Free parking** was suggested as a tool to support businesses in the town. Others mentioned improving the visual attractiveness

of the centre, or encouraging independent retailers.

Table 1: What else would you have liked Stratford District Council to have done for business?

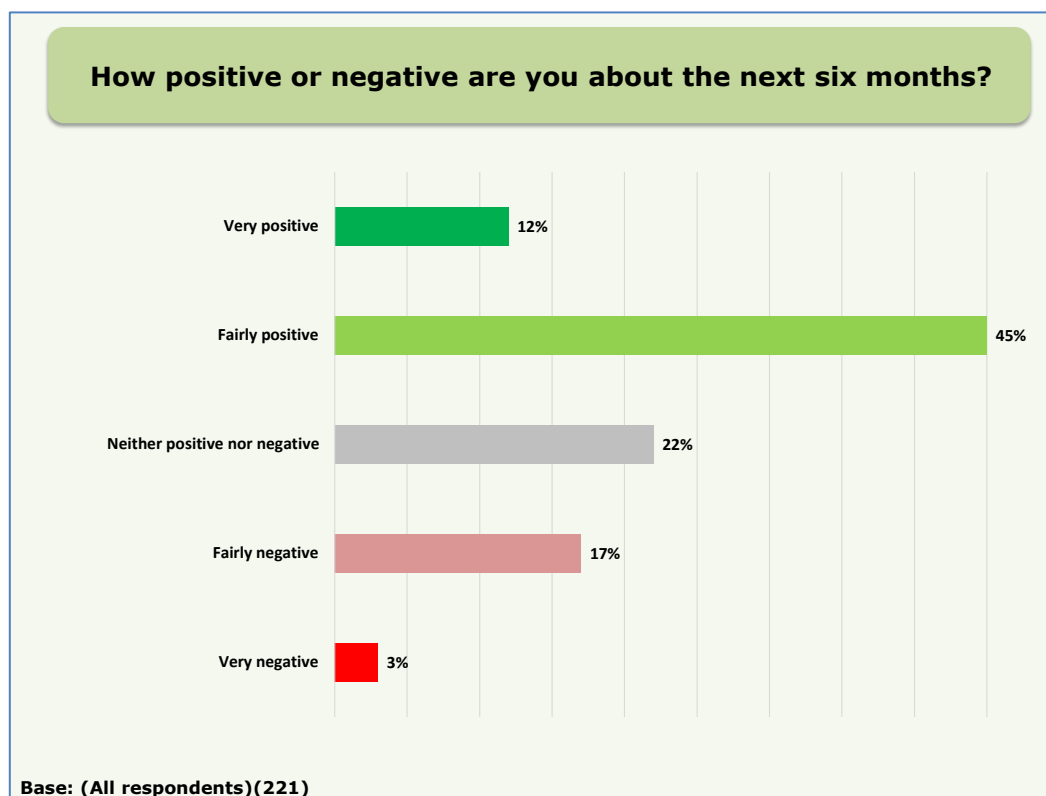
	No.	%
Better communication	16	18
Financial support	14	16
Miscellaneous	13	15
Happy with SDC & support	10	11
Rates relief	7	8
Engagement with business	6	7
Free parking	6	7
High Street	6	7
Better targeting of support	5	6
Nothing	4	5
Other business support ideas	3	3
Rent relief	2	2
Base (All respondents) (88)		

4.5 Next Six Months

How positive or negative are you about the next six months?

57% felt very or fairly positive about the next six months, compared to 20% who felt fairly or very negative.

Figure 11: How positive or negative are you about the next six months?



What are your main concerns or challenges for your business sector in the next six months?

175 responses were received. These covered a range of themes, which are summarised in Table 2 below.

The most mentioned concern was **attracting customers**. Many comments expressed a concern over customer confidence for example in returning to shopping or eating out in the high street, and a worry that lower levels of custom would be harmful for their business:

"Getting back our customer base - just hoping that people will want to return to a bricks and mortar way of shopping."

"Customers' habits have changed: they might not be used anymore to go out for a drink or food as often as before covid-19. Customers' confidence about coming back. Increase of costs."

For many, being able to stay open as a business in order to attract customers was key:

"Whether we will have to close once more. If there is a demand for our products."

"Will we have to close again? Will customers be wary of shopping?"

The second most mentioned concern was over the **lockdowns/restrictions** which had been put into place over the past year. For many, lockdown had meant that they had had to put their businesses on hold completely, particularly those in tourist-related activity or events:

"No holidays mean no boarding of pets."

"Marquee based events which were cancelled in 2020 have rebooked for 2021 but many have moved to 2022. There is still nervousness for new clients booking from July as there is no guarantee, as yet that the opening up will be in full and it take some time for new events to be planned."

"Not allowed to open until 17 May - so will have been shut for 6.5 months now under lockdown 2 and 3 - and will have missed the first part of the season."

For people in Business 2 Business trading, the **loss of business** due to their clients' own difficulties brought about by Covid-19 meant that they faced a difficult period themselves:

"Clients ceasing to trade and/or unable to pay us for work already completed (that we needed to complete to help through C-19 cash flows or applying for furlough)."

"Selling to businesses that have suffered hugely (hospitality, retail, professional)."

"As a provider of legal services, we are impacted by how active our business and personal clients are, and that in turn is driven in large part by business and consumer confidence, If the economy bounces back as hoped when restrictions are eased, we will benefit. If it doesn't, then our revenues will be impacted."

In some cases, changes to customer behaviour precipitated by the pandemic meant that their businesses faced an uncertain future:

"Getting people back into the workplace as we are a B2B business."

"We have no idea whether people working from home will return to travelling i.e. needing cars or whether the market itself will pick up/stock will be available for purchase etc."

Some businesses were worried about increased competition, or the difficulties of gaining clients within a niche market:

"Too much over supply off accommodation even pre-Covid will reduce rates."

"Getting more clients as my field is quite specialised."

Money worries, relating to debt, paying back loans, re-introduction of rates and increasing costs were another significant concern:

"Repaying all the bills that have been adding up since we were forced to shut."

"I need to keep covering the cost of my office space and phone line etc. even though I haven't been able to work from there for many months."

"Affording the increase in NMW and having to pay Business rates again."

Some expressed concern over a recession, or that their customer-base would be more careful with their spending, and their income would be impacted accordingly.

Table 2: What are your main concerns or challenges for your business sector in the next six months?

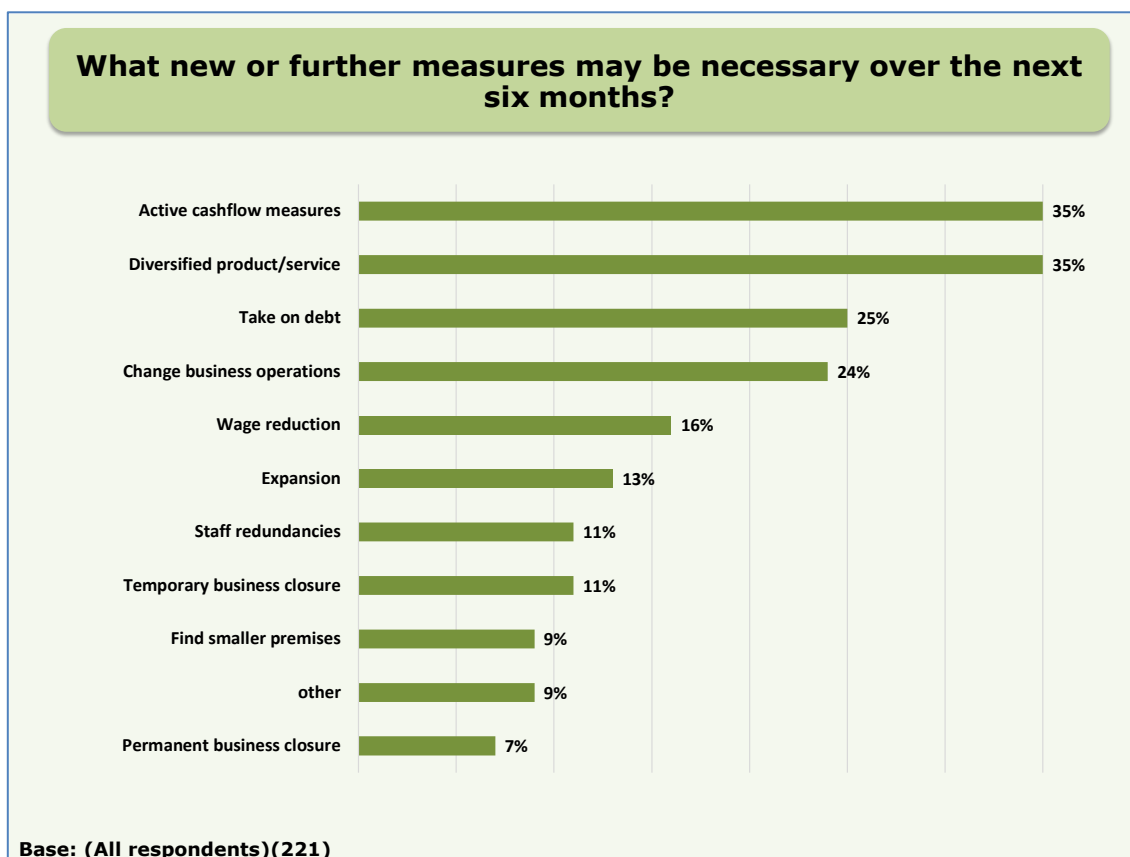
	No.	%
Attracting customers	55	31
Lockdown/Restrictions	51	29
Loss of business	31	18
Money worries	28	16
Uncertainty	9	5
Miscellaneous	9	5
Staffing issues	8	5
Adapting business	4	2
Brexit	4	2
Competition	4	2
Capacity	3	2
'Starting again'	3	2
Covid	2	1
Dealing with backlog	2	1
End of financial support	2	1
Positive	2	1
Base: (All respondents) (175)		

What new or further measures may be necessary over the next six months in your business?

The two most mentioned measures which businesses felt may be needed over the next six months were taking active cash flow measures, such as tax deferral or reducing fixed costs, and diversifying products or services, both at 35%. 25% would take on debt and 24% change business operations.

16% mentioned wage reduction measures, but 13% mentioned expansion. 11% of businesses thought staff redundancies were likely and the same percentage would look at a temporary business closure.

Figure 12: What new or further measures may be necessary over the next six months?



29 relevant responses were received relating to 'other'. A number of different themes emerged from these comments, summarised in Table 3 below.

Six responses stated that they were **not planning to implement any changes** to their business, in the short-term at least. Six responses said that they would be looking to **gain new customers/clients**, or looking at new markets for their goods or services. Five comments suggested that they would look **to adapt their business**; two responses suggested they would do this by taking it wholly online and getting rid of their high street presence, or reducing their face-to-face events short-term, one looking at developing a particular division of their business.

Three comments suggested they would take a **'wait and see'** approach to the next few months. Three mentioned **money**, with one looking at other funding streams, one looking at possible loans, and one looking at further investment they could make to maximise their business. Two comments said that they would be looking to **expand**, opening a new branch or larger premises. Two responses said that they would have to operate with **reduced level of business**. Two comments mentioned **reducing costs**, while two

mentioned **staffing** – either looking at reducing staff levels in the short-term, or using freelance workers.

Table 3: What other measures may be necessary in the next six months?

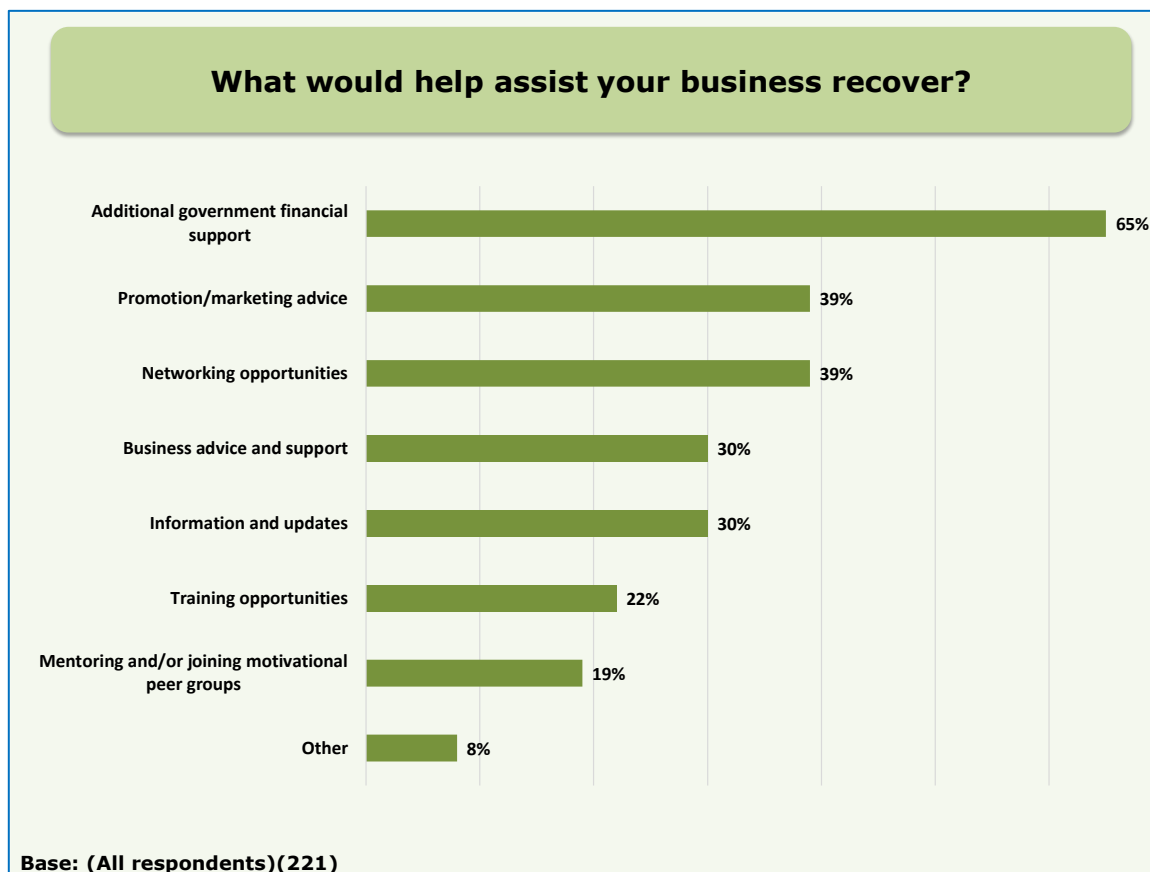
	No.
None	6
Find new customers	6
Adapt the business	5
Money	3
Wait and see	3
Continue with less business	2
Open new branch/franchise	2
Reduce Costs	2
Staffing	2
Maximise customers	1
Base: (Those responding 'other' to Q14) (29)	

4.6 Recovery

In general, what would help your business to assist recovery?

The most popular measure to assist business recovery was additional government financial support, with 65% responses selecting this. 39% wished to have promotion/marketing advice and the same percentage required more networking opportunities.

Figure 13: What would help assist your business recover?



38 responses were received relating to 'other'. A number of different themes emerged from these, as summarised in Table 4 below.

Seven comments suggested gaining **funding** or having funding certainty and gaining further financial support would be helpful. Five comments mentioned **rates**, either for further relief or a review of how rates are charged. Three comments suggested **networking** opportunities, including an idea for a working party of local businesses on the future of the District. Three comments mentioned **planning or bureaucracy**, suggesting making it easier and quicker or reduce it. Two comments wanted to **re-join the single market/Customs Union**. Two comments suggested the ability to **market** their services, especially locally, would help. Two comments suggested **free parking** would support their businesses. Two comments mentioned a lack of appropriate **premises** to move to. Two comments mentioned **recruitment**, with one suggesting making it easier to hire apprentices.

Table 4: What 'other' ways could assist your business with recovery

	No.
Funding/money	7
Miscellaneous	6
Rates	5
No more lockdown/restriction	3
Networking	3
Planning/bureaucracy	3
Re-join Single Market/Customs Union	2
Marketing	2
Free parking	2
Premises	2
Recruitment	2
Base: (Those responding 'other' to Q15) (38)	

What steps do you feel Stratford District Council could take to help your business and help recovery?

111 responses were received. A variety of different themes emerged from these comments, as summarised in Table 5 below.

The most mentioned measure related to **money**. In the main, these talked about needing further financial support or financial support for those who had not qualified for any government/discretionary grants. Second most mentioned themes were the **high street** or town centre, and **marketing**. Many comments suggested the focus should be on supporting independent traders and making the high street an attractive place to encourage people back into town. These comments also included some ideas as to what to do with empty retail space. In terms of marketing, comments wanted to see proactive marketing of the local offer/local business by SDC, and support to enable businesses market successfully.

13 comments mentioned **rates**, again suggesting continuing relief or a rates holiday for an extended period. Comments relating to **parking** suggested either reduced or free parking to encourage more footfall in town. 11 comments mentioning **tourism** related to encouraging more tourists, marketing the area better and providing better information to visitors about local businesses. 10 comments mentioned better **communication** by SDC on help and support for businesses as well as being visible and proactive.

Seven comments mentioned the potential of better **networking** between businesses and how SDC could play a pivotal role in providing this through events and working with Chamber of Commerce. Seven comments also mentioned how SDC could provide other **support** for businesses beyond financial, such as providing advice on different matters including legal advice and conducting research into the local economy and the impacts of the pandemic. **Planning** was mentioned in five comments, suggesting this could be simplified, made faster, and more positive towards diversification of business. Three comments mentioned they would like to see the re-opening of **Venture House**.

Table 5: What steps could SDC take to help your business and help recovery?

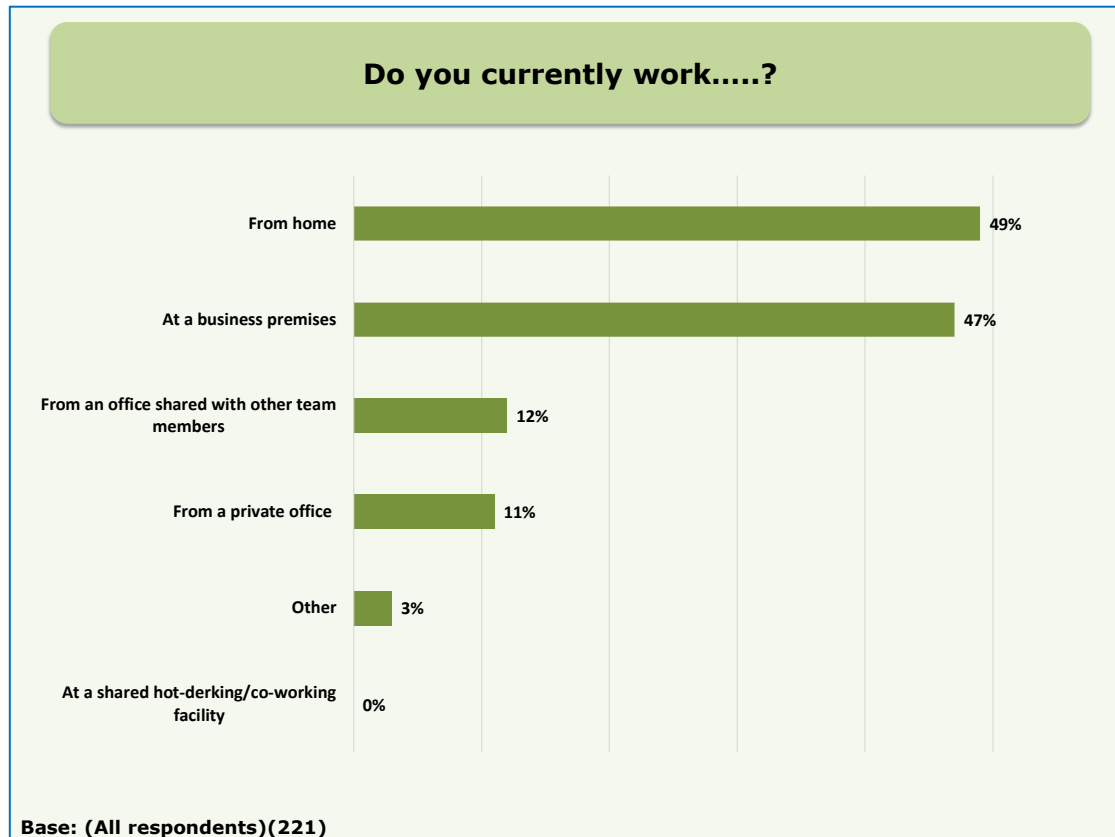
	No.	%
Money	21	19
High Street	14	13
Marketing	14	13
Rates	13	12
Parking	13	12
Tourism	11	10
Communication	10	9
Miscellaneous	9	8
Networking	7	6
Support	7	6
Planning	5	5
None	4	4
Venture House	3	3
Base: (All respondents) (111)		

4.7 Workplace

Do you currently work.....?

Most people were working from home (49%) or at a business premises other than an office (47%).

Figure 14: Where do you currently work?

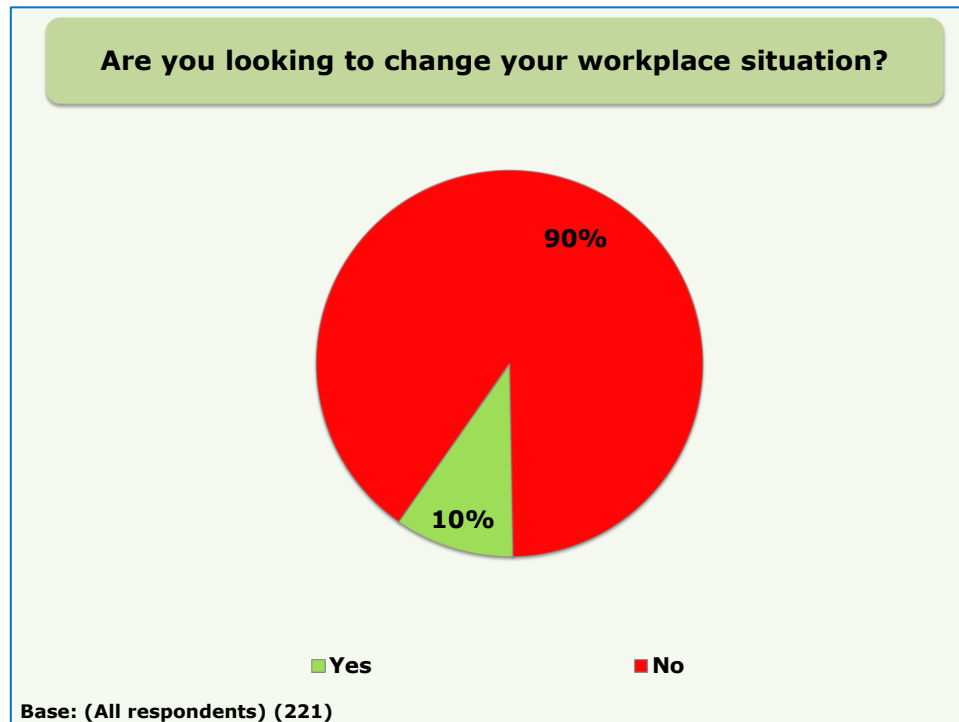


13 responses relating to 'other' were received. These included travelling to clients, being closed due to pandemic, farm, restaurant and warehouse.

Are you looking to change your workplace situation in the short to medium term?

The vast majority of responses (90%) were not looking to change their workplace situation in the short/medium term.

Figure 15: Are you looking to change your workplace situation in the short to medium term?

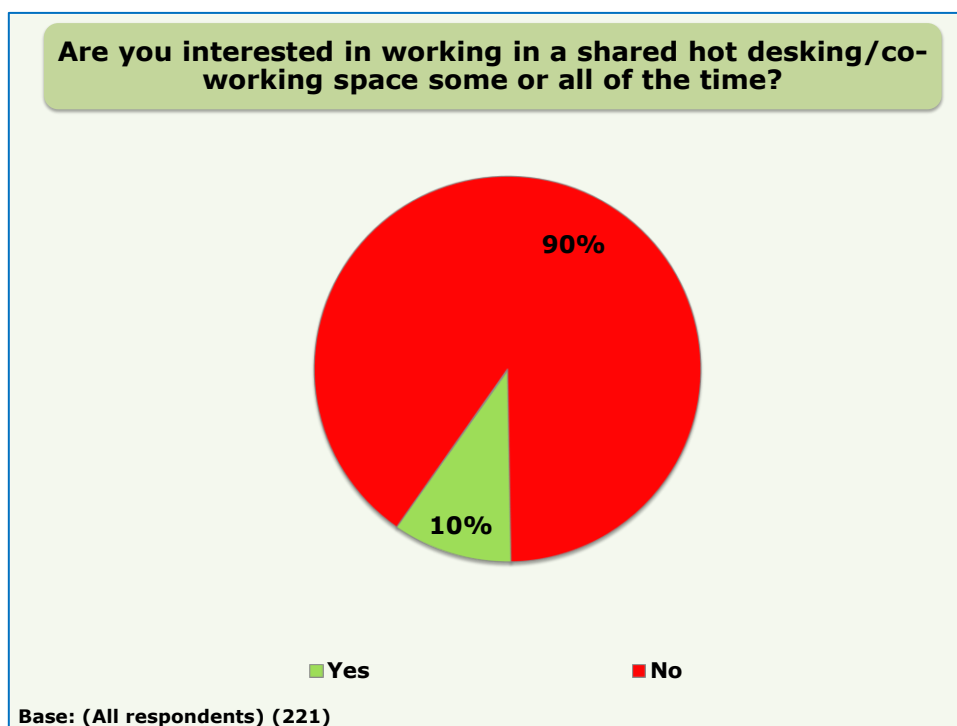


Those who said yes were then asked about their requirements for a new workspace, and how often they thought they would use the space.

- **Size:** answers ranged from 1 – 2000 sqm, with 500sqm the most popular answer.
- **Staff:** answers ranged from 0-15 staff required
- **Where:** answers included Stratford (x4), Studley (x2), Alcester (x2), South/South West (x2)
- **How often:** Everyday – 11 (55%), several times per week – 6 (30%); Several times per month – 6 (30%); Monthly – 0 (0%); as and when – 1 (5%)

Are you interested in working in a shared hot-desking/co-working space some or all of the time?

22 respondents (10%) said that they *were* interested in a hot-desking or co-working space.



They were then asked where they would want this to be, how often they might use it and when they would want to start using it (see tables 6, 7 and 8).

72% said that they would like it in Stratford-upon-Avon, with 27% wanting another location in the district. Of those wanting Stratford-upon-Avon, there was an even split between those wanting the town centre and those wanting out-of-town centre locations.

7 responses related to 'other', namely either Venture House or somewhere else with parking.

11 responses (50%) would like to use it several times a week, while 7 (32%) said several times a month.

Table 6: Where would you prefer this space to be?

	No.	%
Stratford-upon-Avon town centre	8	36
Stratford-upon-Avon out of town centre	8	36
Other location in District	6	27
Base: (Those who would like hot-desk/co-working space) (22)		

Table 7: How often would you use it?

	No.	%
Everyday	1	5
Several times a week	11	50
Several times a month	7	32
Once a month	1	5
As and when	2	9
Base: (Those who would like hot-desk/co-working space) (22)		

Table 8: When would you want to start co-working or hot-desking in the future?

	No.	%
As soon as lockdown is over	6	27
Within 6 months	14	64
Within a year	2	9
More than a year	0	0
Base: (Those who would like hot-desk/co-working space) (22)		