Business Survey 2018

For Derbyshire Dales District Council

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Contents

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This research has been carried out in compliance with the International standard ISO 20252, (the International Standard for Market and Social research), The Market Research Society's Code of Conduct and UK Data Protection law

RESEARCH

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1. Executive Summary

1.1 Methodology and Respondent Profile

The last independent business survey in the district was carried out in 2016 and a similar survey was required in 2018 to update the 2016 data set. The research focussed on businesses located on business parks and industrial estates in the district and others operating from B Class (Business, General Industrial, Storage and Distribution) premises and sites.

A two stage approach was adopted, which consisted of an initial telephone survey followed by an online survey;

- A total of 197 businesses completed the survey (151 by phone and 46 online) from a database of 1,045 eligible businesses, giving an overall response rate of 19%.
- Respondent businesses were spread across the district.
- **Most respondent businesses had 1-9 employees (73%) or 10-49 employees (19%)**, but some larger businesses with 50-199 (7%) and 250+ (1%) were surveyed
- Respondent businesses were most likely to operate in *'manufacturing'* (16%), *'service'* (13%), *'construction'* (13%) or *'engineering'* (12%).
- *The 2016 research also captured the views of 197 businesses (although additional surveys were completed by DDDC which provided more data for some questions) and generally the profile of 2016 respondent businesses was comparable to 2018, with a similar distribution by number of employees and sector. Specifically,* ***45 businesses were identified as having completed both the 2016 survey and the 2018 survey.***

Findings from the survey are detailed below. Based on the full sample of 197 businesses the figures below have a margin of error of +/- 6.3%, although where questions were asked of a sub-group of respondent businesses this margin of error will be greater.

1.2 Key Findings

Current business premises

- Half of businesses interviewed classified their current premises as either *'light industrial'* (27%) or *'office (not serviced)'* (23%), while around one-in-ten respondent businesses operate from *'general industrial'* (12%), a *'serviced office'* (9%) or a *'warehouse'* (8%).
- Of the 197 businesses interviewed, 76 (39%) operate from a business park or industrial estate in the district and this was most likely to be *'Ashbourne Airfield'* (8% of all businesses interviewed) or *'Hathersage Park'* (4% of all businesses interviewed).
- Eight-in-ten businesses (80%) are *'NET: Satisfied'* (meaning they are either *'very satisfied'* or *'fairly satisfied'*) with their current premises; this is a similar proportion to that recorded in 2016 (81%). However, in 2018 more than one-in-ten (13%) expressed some degree of dissatisfaction (either *'very'* or *'fairly dissatisfied'*);
  - Businesses located on business parks and industrial estates were significantly more likely to be *'NET: satisfied'* with their current premises than those located elsewhere (87% vs. 76%)
  - However, businesses with firm expansion plans and those who can't expand due to lack of suitable premises were significantly more likely to be *'NET: Dissatisfied'* than those with no plans to expand (21% vs. 6%).
- As might be expected given the high levels of satisfaction, most businesses felt that their current premises would be adequate for their needs for *'5 years'* (16%) or *'10 years'* (42%), but **one-in-five felt this would only be the case for *'2 years'* (19%)** and one-in-ten (10%) felt they were *'not adequate now'*. Essentially, this means that **45% of businesses indicated that their current premises would no longer be suitable in 5 years' time or less.**

Factors currently restricting business operations

- When presented with a list of factors that might restrict business operations, most did select at least one factor and while considerations around business premises are clearly evident for some, a range of other factors also seemingly act as a barrier;
    - Selected most often was ***'inadequate broadband availability'* (31%)** – as context to this, later questions about the importance of broadband to their business recorded that 46% thought this was *'imperative'*
    - Businesses also selected property related issues particularly ***'size of your current premises'* (27%)**, *'quality of your current premises'* (12%), *'planning issues'* (14%) and *'rents'* (10%)
    - A quarter of businesses selected *'recruiting staff'* (25%)
    - Parking is also a concern, both for *'...customers'* (21%) and *'...staff'* (18%).

Expansion plans

- **Almost two-fifths (38%) of businesses said they had expansion plans and a further 7% said they didn't but this was because they *'...are not able to find suitable premises'*;** this equates to 87 businesses in total that are considering expansion.
- *The 2016 survey recorded that 43% of businesses had firm expansion plans which is comparable to the figure recorded in 2018.*
- Businesses with firm expansion plans and those that felt expansion wasn't possible due to the availability of *'suitable premises'* were asked a series of questions about expansion;
    - 97% said that potential expansion would involve additional jobs being created and these businesses expected to create an average of 6.7 new jobs (including an average of 3.1 *'high skilled'* jobs)
    - A fifth (18%) said that they *'don't know'* what expansion would mean in terms of the business's premises, but **nearly half (47%) said they'd require *'new premises'*** while 15% (equating to 13 businesses) felt they would need *'additional land'*
    - Almost a third (30%) of businesses with expansion plans said that these could be accommodated by *'expanding existing premises'*.

Requirements for new premises and sites

- 13 respondent businesses said they'd need *'additional land'* to expand and the average amount of land required was 11.53 acres.
- Businesses were more likely to need new premises (41 businesses said this) rather than additional land to expand, and a range of different requirements were mentioned as follows;
    - **Required most are *'light industrial'* (37%)**, *'office (not serviced)'* (20%) and *'warehouse'* (17%) premises
    - A range of different preferred locations were mentioned ranging from an *'industrial estate'* (29%) to the *'edge of town centre'* (17%) and a *'rural location'* (15%).
    - Businesses don't necessarily want premises that are the highest quality, with only 12% wanting *'prestige'* and **44% wanting *'good quality'*** – in fact 24% said they were happy with *'average'* quality and one-in-ten (10%) wanted something to match a *'basic budget'*.
    - A range of different sizes of new premises are likely to be required, with around half (equating to 20 businesses) likely to require new premises of between 101-

200sqm/1,191-2,150 sq ft and around a third (equating to 13 businesses) looking for 201-1,000 sqm/2,151-10,800 sq ft. Least required are the largest premises (1,001 or more sqm /10,801 or more sq ft), with only 3 businesses needing these.
  - A slight preference for *'freehold'* rather than *'leasehold'* is evident (39% vs. 22%), but a third of businesses likely to need new premises to expand said they had *'no preference'* (32%).
  - **In the main, these businesses are also willing to relocate from their current location in the district to another one within the district (68%)**, although the majority of the 28 businesses that said this felt they wouldn't want to move more than 10 miles away (10 would move *'up to 5 miles'* and 10 *'up to 10 miles'*).

- All businesses with firm expansion plans and those that felt expansion wasn't possible due to the availability of *'suitable premises'* were asked to outline what factors are most important to them in selecting new premises;
  - No single factor dominated responses here, but mentioned most frequently was the *'cost of premises'* (48%) and *'broadband provision'* (39%). Also, *'business rates'* (31%), *'good road infrastructure'* (30%) and *'car parking'* (28%) were mentioned by more than one-in-four of these businesses.
  - One-in-four of these businesses said that if new premises became available in the next 2 years which met their requirements their business would *'almost certainly take them up'* (24%) and a further 47% said they would *'consider taking these premises'*.

The implications of Brexit

- The majority of respondents felt that Brexit would mean either *'no change'* (39%) to their business or said they simply *'don't know'* (20%), but amongst those that did express an opinion either way businesses were more likely to think that it would have a *'negative impact'* rather than a *'positive impact'* (35% vs. 7%).
- Respondents were asked to consider a number of ways in which Brexit could specifically impact on their business by giving a score out of 10 (where 10 meant it would have a very big impact) and responses were as follows;
  - **The impacts flagged most frequently as potentially affecting respondents' businesses related to the cost of purchases, particularly *'...if the strength of the pound continues to fall'* (47%) and *'...if import tariffs are imposed'* (38%)**
  - Around a quarter gave a score of 7-10 for *'changes to regulations or industrial and consumer standards'* (24%) and/or the *'ease of doing trade with the EU' (27%)*.
  - Other potential impacts were less of a concern with only 15% giving a score of 7-10 for *'disruption to contracts'* and 10% for *'access to labour from the EU'*
  - The list also included potential benefits, but comparatively low proportions thought that the *'opportunity to gain new markets outside the EU'* would impact on their business (9% gave a score of 7-10) and 27% said this was simply *'not applicable'* to them.
- To ensure that all possible impacts of Brexit (both positive and negative) were explored, a fully open question was included to ask respondents what the single biggest way was that it could impact on their business; generally comments made related to the negative impacts rather than opportunities or benefits and a range of answers were given, but mentioned most frequently were *'increased costs associated with imports, travel or shipping'* (22%) and the *'fall in the value of the pound'* (10%).

Future plans

- Although it was not linked directly to the impact of Brexit, a question was included immediately after the section on Brexit to establish if businesses were proposing to continue with any planned investments over the next 12 months.
- Around a quarter said that their business had *'no investments planned'* (27%). Once these businesses are removed from the calculations, **65% said that they were proposing to continue with planned investments over the next 12 months**, but 25% said that they were not and a further 10% were *'unsure'*.
- Additionally, businesses were asked to assess how their staff numbers and turnover were likely to change over the next 2 years and then over the next 5 years;
    - Over the next 2 years, the majority of businesses expect their turnover to *'increase'* (58%), while few felt it would *'decrease'* (11%). Around two-fifths felt that staff numbers would *'increase'* (42%) over this period and businesses were much more likely to feel that there would be an increase rather than a *'decrease'* (5%). However, businesses were most likely to consider that staff numbers would *'stay the same'* (48%) over a 2 year period.
        - *These figures are comparable to those recorded in 2016.*
    - Businesses were slightly more positive about their prospects over the next 5 years, with 62% expecting turnover to *'increase'* and only 8% anticipating a *'decrease'*. Views on staff numbers were very similar to a 2 year period, with 40% expecting this to stay the same and 44% envisaging an *'increase'*.
        - *Compared with 2016, views on turnover in the next 5 years are comparable, but 2018 respondents were significantly less likely to envisage an increase in staff over a 5 year period compared with those in 2016 (44% vs. 55%).*

Broadband experience

- 46% of respondent's considered that fast reliable broadband was *'imperative'* to their business and a further 35% felt it was *'very important'*.
- In line with this, businesses that view the internet as important readily identified ways in which improvements to the speed and reliability of their broadband service would benefit their business; in particular they talked about how it would *'speed up processes'* (66% mentioned this), lead to *'more effective communication'* (66%) and ***'improve business productivity'* (61%)**, but many other benefits were cited.
- 62% of businesses that use the internet said they had experienced problems with their current broadband; this was most likely to be *'reliability (e.g. dropping out, being disconnected)'* (a problem experienced by 34% of internet users) as well as issues with *'maximum speed'* (22%) and *'speed at different times of the day'* (22%).

2. Background and Objectives

The primary aim of the District Council's Corporate Plan 2015-19 is to enable a *'Thriving district'*. Business growth and job creation, specifically *'Helping new businesses to start and existing businesses to grow'* is the top priority for the Council. Results from a business survey were required to inform the Council's Economic Development programme to help achieve these priorities.

The last independent business survey in the district was carried out in 2016 and the survey focused on business accommodation needs and access to broadband. A similar survey was required in 2018 to update the 2016 data set and understand the views of businesses in the district.

Specifically, the objectives of this research were to;

- Undertake a survey with a robust sample of businesses in the district ensuring that the opinions of key decision makers are gathered
- Design a suitable questionnaire, building on the one used in 2016 to ensure continuity and comparability (as far as possible)
- Identify and source a suitable sample of business contacts for the research, focusing on businesses located on business parks and industrial estates and those operating from B Class (Business, General Industrial, Storage and Distribution) premises
- Undertake full data processing and analysis and provide the final data in user-friendly format
- Produce a written report, which analyses the findings in detail and makes comparisons (where this is appropriate) with the 2016 survey
- Provide insight that will inform the council's Economic Development programme.

The following sections outline how we will meet these objectives.

3. Methodology

A two stage approach was adopted to maximise the opportunity for qualifying businesses to take part in the survey, which constituted an initial telephone survey followed by an online survey.

Firstly, a database of qualifying businesses had to be compiled. The research focussed on businesses located on business parks and industrial estates in the district and others operating from B Class (Business, General Industrial, Storage and Distribution) premises and sites. To gather contact details, a list of target postcodes and target SIC codes was compiled and this was provided to Dun & Bradstreet who then provided details of all companies that matched this list. This list was then combined with a list of contacts that DDDC held in-house to produce a single list of eligible businesses which formed the target sample for the research. In all, 1.045 businesses were identified in this way.

Then, a total of 151 CATI telephone interviews were completed with businesses from Qa's on-site contact centre based in York. All interviewing was carried out between 4 September and 18 September 2018.

The second stage of data collection was to email an invitation to complete the survey online to all contacts with an email address that had not completed the telephone survey and had not refused to complete the survey when contacted by phone.

In total, 328 contacts were sent the email invitation and DDDC officers made contact with some of these businesses directly to encourage participation.

Across both stages, 197 surveys were completed, giving an overall response rate of 19%.

Data were analysed by Qa's in-house ICT team and data tables produced. The report is based on analysis of these

4. How to Read This Report

Findings from each question have been analysed and are detailed in the commentary in Section 5..

With a target sample of 1,045 businesses and based on a sample of 197 survey completions, the findings have a margin of error of +/- 6.3% when based on the total sample. Where questions are based on smaller sub-samples the margin of error will be greater.

Where appropriate, responses from specific questions have been presented as charts or tables and please note the following;

- The base size for each question is clearly displayed at the bottom of each chart/table – in most instances responses are based on the full sample of 197 surveys, but where questions are routed based on answers to previous questions the base size will be smaller.
- Where questions allowed multiple responses the sum of all answers may be greater than 100%.
- Where questions did not allow multiple responses, the sum of answers may still be 1-2 percentage points greater than 100% due to the effect of *'rounding'*.

Where appropriate, differences in responses amongst key sub-groups have been outlined. It's important to note that with an overall sample size of 197 respondents, many sub-groups are small and it is not statistically valid to analyse data amongst them. Where this occurs, the actual number of respondents is outlined.

Additionally, where the same question was asked in 2016 and 2018 comparisons have been made between the data gathered at each survey to explore trends over time.

5. Key Findings

This section outlines the key findings from the research.

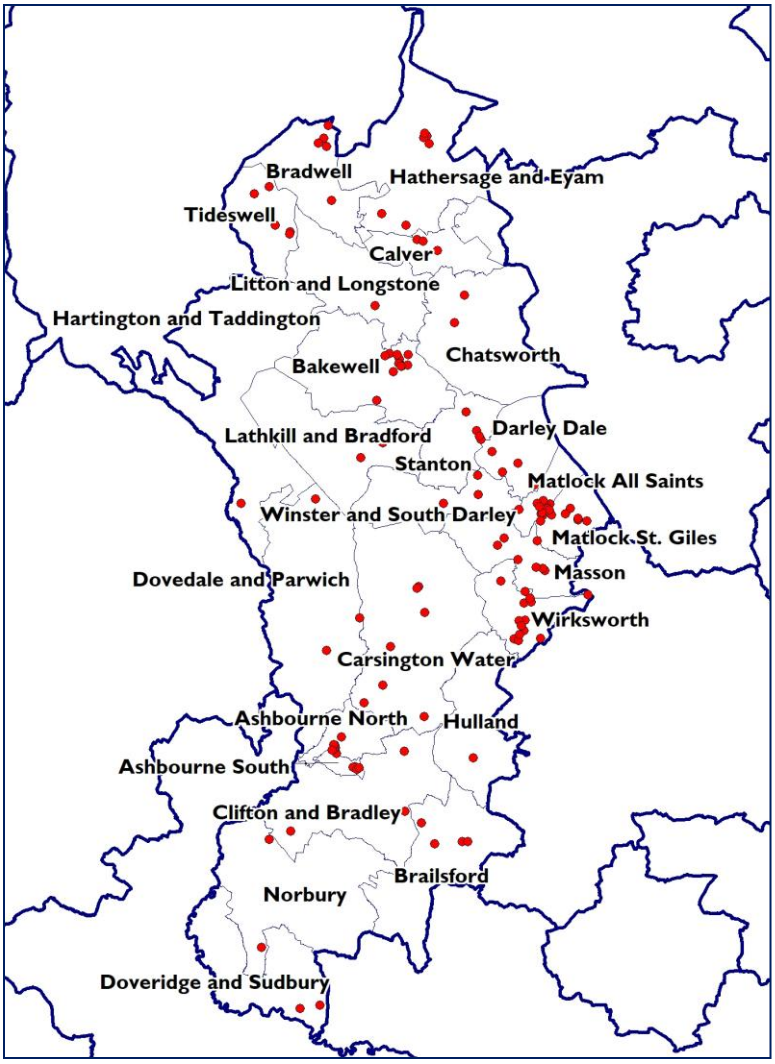
5.1 Respondent Profile

5.1.1 Business Location

The location of the respondent's business was confirmed in the survey by checking the postcode. Analysis of these postcodes highlights that of the 197 businesses interviewed, 76 (39%) operate from a business park or industrial estate in the district and this was most likely to be *'Ashbourne Airfi*eld' (8% of all businesses interviewed), 'Hathersage Park' (4% of all businesses interviewed), *'Via Gellia Mills Bonsall'* (4% of all businesses interviewed), *'Molyneux Business Park Darley Dale'* (3% of all businesses interviewed) or *'Brookfield Industrial Estate and Scholes Mill Tansley'* (3% of all businesses interviewed).

The map below shows the geographical location of businesses that completed the survey;

Figure 1. Geographical location of respondent businesses



5.1.2 Business Sector

All respondents were presented with a list of sectors and asked to pick one that best represented the one that their business operates in. Responses highlighted that businesses occupying Part B premises and sites operate in a wide range of different sectors, but mentioned most frequently were *'manufacturing'* (16%), *'service'* (13%), *'construction'* (13%) and *'engineering'* (12%).

Additionally, all businesses were asked to describe in their own words exactly what their business does and this information has been used to classify each business against the Standard Industrial Classification (SIC); this analysis highlights that around a fifth of business operate each of the following SIC codes; *G - Wholesale and retail trade; repair of motor vehicles and motorcycles* (21%), *C - Manufacturing* (19%) and *M - Professional, scientific and technical activities* (19%).

5.1.3 Business Size (number of employees)

The majority (73%) of respondent businesses have 1-9 employees (including the respondent themselves) while a further 19% have 10-49. However, some larger businesses with 50-199 (7%) and 250+ (1%) were also surveyed.

Of the 15 respondents businesses with 50 or more employees, 6 operate in *'manufacturing'*, 3 in *'food and drink'* and 2 in *'retail'* with the remainder spread across the other sectors.

5.1.4 Comparison with 2016 Respondents

The 2018 survey was designed to ensure comparability with findings from the 2016 survey and to do this the same type of businesses were invited to take part (those operating from Part B Premises) and many of the same questions were included. In both 2016 and 2018, 197 businesses completed the survey (but note that some questions in 2016 were then supplemented with data from other sources).

Generally, the profile of 2018 respondent businesses was comparable to 2016 and similar to the district profile. Therefore, throughout this report, and where appropriate, findings amongst the total sample in 2016 and 2018 have been compared to determine how the views of this business community may have changed.

Specifically, 73% of businesses that completed the survey in 2018 were micro-businesses with fewer than 10 employees (compared with 72% in 2016) and a further 19% were small businesses (10-49 employees) (21% in 2016); the remaining 8% of businesses that took part in the survey in 2018 had 50+ employees.

The largest proportion of responses came from businesses within the *manufacturing and engineering* sectors (28%, compared to 30% in 2016). After this, businesses were most likely to operate in the *service* sector (13%, the same proportion as in 2016), *construction* (13%, compared to 9% in 2016) and *creative and digital industries* (10%, compared to 9% in 2016).

Nearly a quarter of respondents (45 businesses) completed both the 2016 and 2018 surveys.

5.2 Current Premises

Respondents were presented with a list and asked to choose the one that best represented the type of accommodation that their business currently occupies. A range of responses were given here, but **half of businesses classified their premises as either *'light industrial'* (27%) or *'office (not serviced)'* (23%),** while around one-in-ten respondent businesses operate from *'general industrial'* (12%), a *'serviced office'* (9%) or a *'warehouse'* (8%). Notably, a fifth mentioned a type of premises that was not on the list and this included a *'home office'* (5%), a *'shop'* (5%) and a *'farm or barn conversion'* (5%).

While only 12% of all respondents mentioned a *'general industrial'* site, this figure increased to 26% amongst those with 10 or more employees.

While respondents were readily able to describe their business premises, not all felt willing or able to say how large it was with 20% indicating that they *'don't know'*. However, half (50%) occupy premises that are below 2,151 sq ft (201 sqm), with a quarter in premises of 10-540 sq ft (1-50 sqm).

It's clear from responses that **businesses are generally satisfied with their current premises**, as eight-in-ten (80%) said they are *'NET: Satisfied'* (meaning they are either *'very satisfied'* or *'fairly satisfied'*).

This increases to 87% amongst those that are located on an industrial estate or business park, significantly higher than amongst businesses located elsewhere (76%). Satisfaction is also significantly higher amongst businesses that occupy a *'serviced office'* compared with those in an *'office (not serviced)'* (94% vs. 76%), perhaps suggesting that this arrangement is a slightly better fit for businesses.

However, more than one-in-ten (13%) expressed some degree of dissatisfaction (either *'very'* or *'fairly dissatisfied'*); these businesses occupy a range of different types of accommodation currently so there doesn't appear to be a concern with any particular type of accommodation, but it is notable that of the 25 businesses that said they were *'NET: Dissatisfied',* 19 are not located on an industrial estate or business park. It's also the case that a fifth of those in an *'office (not serviced)'* said they were *'NET: Dissatisfied'* with their current premises.

Additionally, businesses with firm expansion plans and those who can't expand due to lack of *'suitable premises'* were significantly more likely to be *'NET: Dissatisfied'* than those with no plans to expand (21% vs. 6%).

Comparison with 2016;

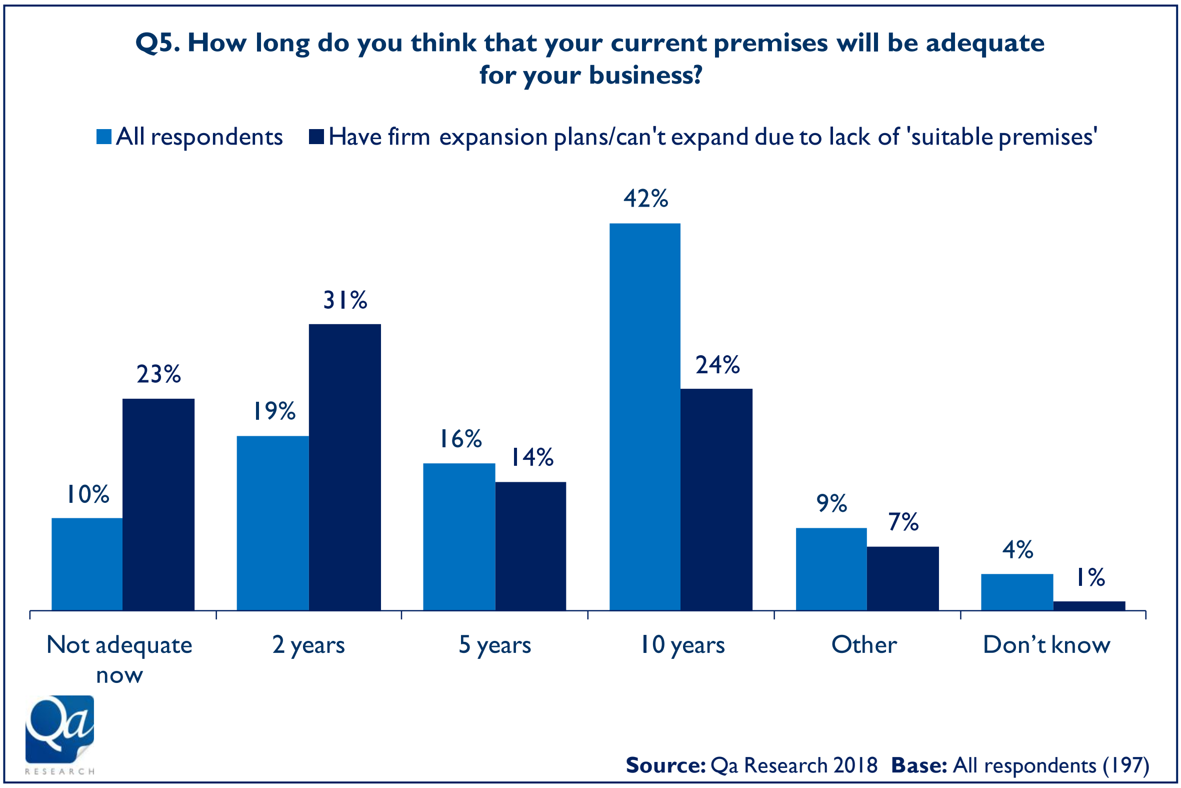
Compared with 2016, in 2018 respondents were significantly less likely to say that their business occupies an *'office (not serviced)'* (23 % vs. 33%) but significantly more likely to say it occupies *'light industrial'* premises (27% vs. 11%) suggesting a slightly different mix of businesses were interviewed each year.

It's also notable that 2018 respondents were more likely to know the size of their current premises, as only 20% said they *'don't know'*, compared with 47% in 2016.

An almost identical level of *'NET: satisfaction'* was recorded amongst respondents in 2016 (81%), indicating that there has been no movement in this measure over the last 2 years.

Respondents were asked to indicate how long their current premises would be adequate for their business. The chart below shows responses amongst all respondents and compares these to responses amongst businesses that said they either had firm expansion plans or wanted to expand but felt it wasn't possible due to the availability of *'suitable premises'*;

Figure 2. Length of time existing premises are likely to be adequate



As would be expected given the high levels of satisfaction, most businesses see their premises as being adequate for at least 5 years, although some are evidently occupying inadequate premises now and this includes one-in-four (23%) of businesses with expansion plans (in addition, around a third (31%) of which also feel their premises won't be adequate in 2 years).

5.3 Factors Currently Restricting Business Operations

When presented with a list of factors that might restrict business operations, most (79%) did select at least one factor, although no single factor dominated responses. Instead, a range of different considerations are felt to restrict operations.

Mentioned most frequently was *'inadequate broadband availability'* (31%). Later questions about the importance of broadband to their business recorded that 46% thought this was *'imperative'* and these respondents were certainly more likely to mention *'inadequate broadband availability'* (40%) than others, but they were almost equally likely to mention the *'size of your current premises'* (36%)

Indeed, amongst all respondents, after broadband, factors relating to premises were mentioned most frequently particularly *'size of your current premises'* (27%), *'quality of your current premises'* (12%), *'planning issues'* (14%) and *'rents'* (10%).

All these factors were mentioned significantly more by businesses that said they either had firm expansion plans or wanted to expand but felt it wasn't possible due to the availability of *'suitable premises'*; for example, 43% mentioned the *'size of your current premises'* and 21% said 'planning issues'. However, another key challenge for these businesses is *'recruiting staff'* which was mentioned by (37%).

Overall, a quarter of businesses felt that *'recruiting staff'* (25%) restricted their operations, although this increased to 45% amongst businesses employing 10 or more staff, which may be a better barometer of the challenges this poses as they are likely to undertake more recruitment than smaller businesses.

Parking is also a concern, both for *'...customers'* (21%) and *'...staff'* (18%).

Comparison with 2016;

The only statistically significant difference in responses between 2016 and 2018 was for *'recruiting staff'* which was mentioned by 16% in 2016 but 25% in 2018 suggesting that this has become more of an issue over the last 2 years.

5.4 Expansion Plans

Respondents were asked if their business had plans to expand and 38% confirmed that they had. Furthermore, 7% said that they didn't but this was simply because they were *'not able to find suitable premises'*. Taken together, this means that **44% have firm expansion plans or plans that are restricted by the lack of '*suitable premises*'[1].**

When these businesses were asked how they would accommodate this expansion around a fifth (23%) said they *'prefer not to say'* or simply *'don't know'* while 30% said this could be done by *'expanding existing premises'*. However, 47% said they'd require *'new premises'* and 15% said they would need *'additional land'*.

Notably, businesses with expansion plans that operate from premises that are *not* on an industrial estate or business park were significantly more likely than those that were to say they could grow by *'expanding existing premises'* (44% vs. 13%) suggesting that when a business outgrows premises on one of these parks it has little choice but to move away.

Comparison with 2016;

In 2016, 43% said they had plans to expand, an equivalent figure to the 44% recorded in 2018. Additionally, almost the same proportion of those with expansion plans said they required either *'new premises'* or *'additional land'* to expand (64% compared with 62% in 2018).

[1] *Note: As all percentages in this report are rounded to the nearest whole number, the combined total of these 2 individual responses is actually one percentage point lower than the sum produced by the simple addition of the 2 percentages.*

5.5 Future Business Premises Needs

5.5.1 Additional Land Requirements

The number of businesses likely to need *'additional land'* for expansion is only 13, and when asked what size of land they would need a range of answers were given ranging from 6,458 sq ft (0.14 acres) by a manufacturing business to 4,356,000 sq ft (100 acres) by an agricultural business.

The average (mean) amount of land required was 502,360 sq ft (11.53 acres), but this is obviously increased by the large requirement of one agricultural business - as all the others wanted less than 175,000 sq ft (4.02 acres).

5.5.2 Type and Size of New Premises

Businesses with expansion plans were more likely to say they'd need *'new premises'* rather than *'additional land'* and in total 41 businesses said that this was the case. A range of different types of premises are required and generally businesses are looking for a similar type of premises to that which they current occupy (i.e. they are not looking to switch to a different type - mentioned most frequently were *'light industrial'* (37%), *'office (not serviced)'* (20%) and *'warehouse'* (17%) premises.

The chart below shows the size of new premises businesses would be looking for;

Figure 3. Size of new premises required for expansion

Q10. What size of new premises do you require?	n	%
Square metres/square feet		
1-50 sqm / 10-540 sq ft	7	17%
51-100 sqm / 541 1,100 sq ft	7	17%
101-200 sqm / 1,191 2,150 sq ft	6	15%
201-500 sqm / 2,151-5,400 sq ft	5	12%
501-1,000 sqm / 5,401- 10,800 sq ft	8	20%
1,001 or more sqm / 10,801 or more sq ft	3	7%
Don't know	5	12%
Base: All that require new premises for expansion (41)		

Businesses don't necessarily want new premises that are the highest quality, with only 12% wanting *'prestige'*, while **44% want *'good quality'* premises**. In fact, 24% said they were happy with *'average'* quality and 10% would actually be looking for something to match a *'basic budget'*.

However, a slight preference for *'freehold'* rather than *'leasehold'* is evident (39% vs. 22%), although a third of businesses likely to need new premises to expand said they had *'no preference'* (32%).

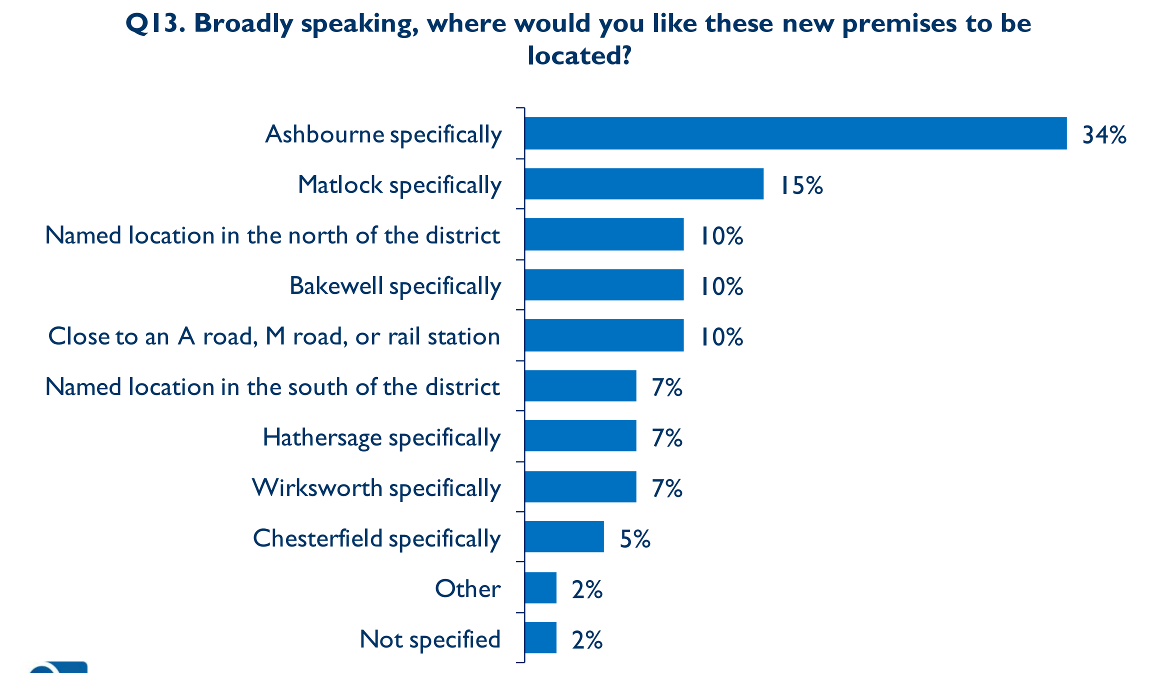
5.5.3 Location of New Premises

Reflecting the varied range of requirements, no single preferred location dominated responses with some happy to re-locate to an *'industrial estate'* (29%) some to the *'edge of town centre'* (17%) and some to a *'rural location'* (15%).

In total, 68% of businesses (equating to 28 businesses) requiring new premises for expansion said they would be willing to relocate from their current location in the district to another one within the district - the majority of these (20 businesses) said they would only be prepared to relocate up to 10 miles.

The table below shows the preferred location of new premises. Note, that this was an entirely open question so respondents could give any answer they wished to and similar ones have been grouped below;

Figure 4. Preferred location for new premises



Source: Qa Research 2018 **Base:** All businesses with expansion plans that require new premises (41)

5.5.4 Key Factors When Choosing New Premises

All businesses with firm expansion plans and those that felt expansion wasn't possible due to the availability of *'suitable premises'* were asked to outline what factors are most important to them in selecting new premises.

No single factor dominated responses here, but mentioned most frequently was the *'cost of premises'* (48%). After this, was *'broadband provision'* (39%), *'business rates'* (31%), *'good road infrastructure'* (30%) and *'car parking'* (28%).

Businesses with expansion plans that are based on an industrial estate or business park were significantly more likely than those that aren't to mention *'good road infrastructure'* (44% vs. 19%) suggesting that this is a key consideration if based on this type of site.

Also, one-in-four of these businesses said that if new premises became available in the next 2 years which met their requirements their business would *'almost certainly take them up'* (24%) and a further 47% said they would *'consider taking these premises'*.

5.5.5 Creation of New Jobs

Amongst the 87 businesses that said they had firm expansion plans or wanted to expand but felt expansion wasn't possible due to the availability of *'suitable premises'*, 84 (97%) said that this expansion would be likely to lead to additional jobs being created.

The average (mean) number of jobs that could be created was 6.76, but this covered a wide range, with 9 businesses indicating that they would probably create one extra job and one expecting to create 100. However, most businesses (69 of the 84 that answered this question) said that they anticipated creating 10 or fewer.

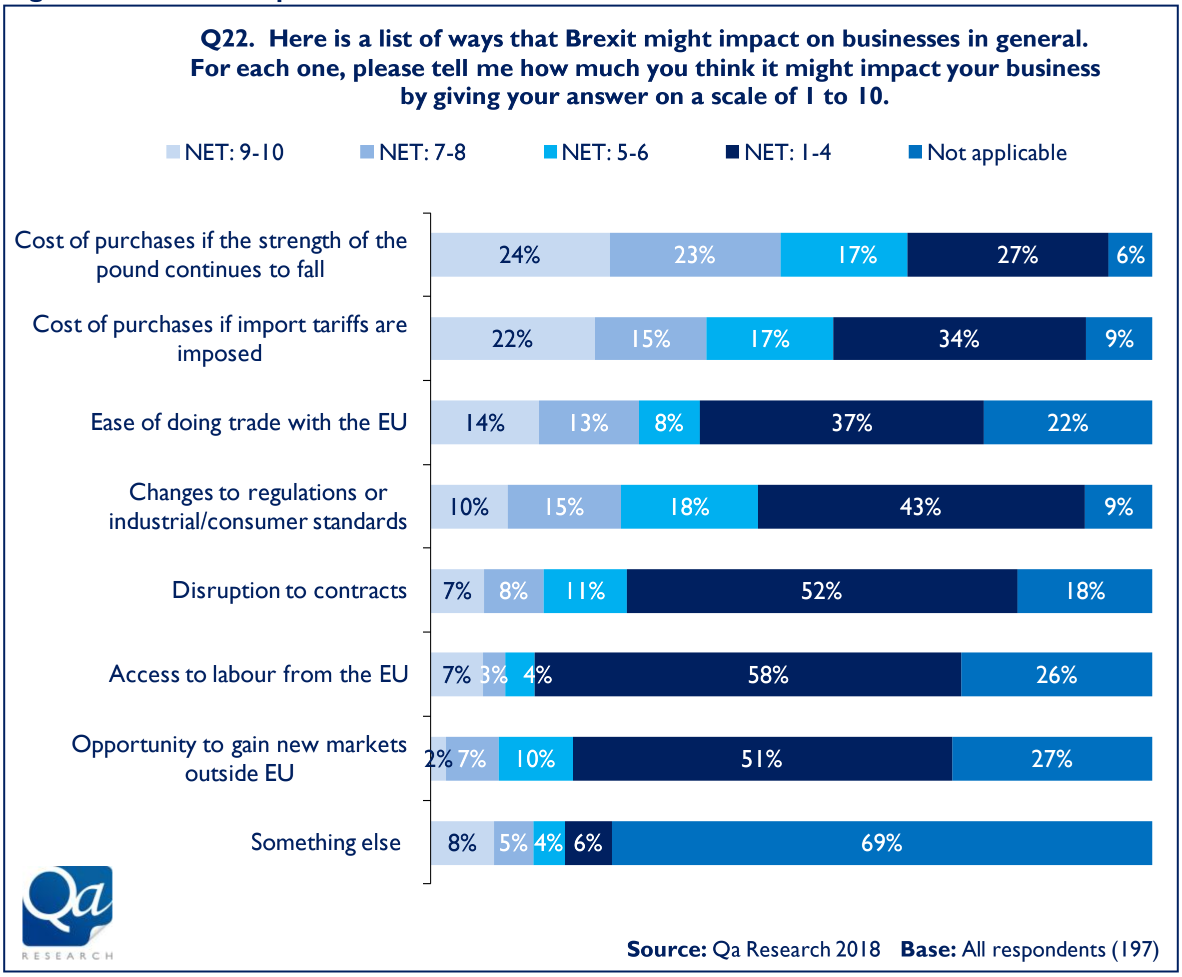
Around half the jobs that are likely to be created are considered by business to be *'high skilled'* with an average (mean) of 3.14 created per business that expects to create any new jobs.

5.6 The Implications of Brexit

Respondents were asked what they thought the overall impact of Brexit would be on their business. The majority of businesses didn't have strong opinions on the matter, 39% thought Brexit would mean *'no change'* for them and 20% said they simply *'didn't know'* what impact it would have. Of those that expressed an opinion either way, however, the view was that it was more likely to have a *'negative effect'* (35%) rather than a *'positive effect'* (7%).

Businesses were then asked to consider the specific ways in which Brexit could impact them. The chart below shows the full breakdown of scores for all the potential impacts of Brexit included in the survey. Respondents gave various factors a score of 1-10 (10 meaning it would have *'a very big impact'*), so for analysis purposes scores on this scale have been grouped into NETS of 1-4, 5-6, 7-8 and 9-10 on the chart below for ease of comparison.

Figure 5. Potential impacts of Brexit on businesses



Respondents concerns mainly surrounded its effect on costs. Nearly half thought the *'cost of purchases if the strength of the pound continues to fall'* would have an impact (47%, gave ratings of 7-10) on their operations, while 38% indicated *'cost of purchases if import tariffs are imposed'* as a cause for concern (again 7-10 ratings).

Businesses that either had firm expansion plans or who couldn't expand due to a lack of *'suitable premises'* appeared to be more concerned about the potential cost impacts of Brexit than those who had no such plans. A significantly higher percentage of these businesses (47%), than those who were not expanding (31%) gave *'cost of purchases if import tariffs are imposed'* scores of 7-10.

A similar trend was seen for those scoring '*cost of purchases if the strength of the pound continues to fall*' at least 7 (56% vs. 42%).

Business operating in the *'manufacturing'* sector seem to be especially concerned about import tariffs and the strength of the pound – for both statements, 68% indicated they would have a big impact by giving a score of 7-10, significantly higher than businesses operating in other sectors.

The potential issue of trading after Brexit was of concern to some, with around a quarter giving scores of 7-10 for the *'ease of doing trade with the EU'* (27%) and/or *'changes to regulations or industrial and consumer standards'* (24%); here also, amongst businesses operating in *'manufacturing'* these proportions increased to 48% and 35% respectively, higher than amongst businesses operating in other sectors.

Of less concern would seem to be *'disruption to contracts'* (only 15% gave scores of 7-10 and 18% said this was *'not applicable'* to them) as well as the effect on *'access to labour from the EU'* (just 10% gave 7-10 ratings and 26% said this was *'not applicable'*).

As would be expected, given that overall expectations regarding the impact of Brexit were mainly ambivalent or negative, few felt Brexit would afford them the *'opportunity to gain new markets outside the EU'* (only 9% gave this a score of 7-10, while over a quarter (27%) said this was simply *'not applicable'* to them). Notably, 16% of businesses that felt that Brexit would have a *'negative effect'* gave a score of 7-10 for this, suggesting that some do see opportunities despite overall concern about the impact of Brexit.

To fully explore all possible impacts of Brexit, respondents were asked what was the *'the single biggest way Brexit could impact their business'*. This was a fully open question to capture any opinions not covered by previous questions.

A wide variety of factors were flagged which are shown in the table below. Responses tended to relate to negative impacts as opposed to opportunities and the most commonly raised issues again surrounded the potential impact on costs (such as shipping) after Brexit.

Figure 6. Expectations of what could be the single biggest impact of Brexit

Q23. What is the single biggest way that Brexit could affect your business, whether positively or negatively?	Count	%
Increased costs associated with imports, travel or shipping	43	22%
Fall in value of GBP	20	10%
Regulatory alignment issues	14	7%
Better focus on UK goods and UK market	12	6%
Reduced consumer confidence or fall in demand	11	6%
Disruption in supply chain, and travel or shipping delays	10	5%
General economic instability	9	5%
Higher export tariffs	8	4%
Reduced scope for collaboration or shared funding opportunities	8	4%
General uncertainty makes business planning difficult	7	4%
Generic negative comment	7	4%
Not clear at this stage what impact Brexit will have	7	4%
Knock-on effect of disruption to other industries	6	3%
Loss of access to the single market	6	3%
Loss of freedom of movement	5	3%
Recruitment issues	5	3%
Positive impact of UK sovereignty over regulations	5	3%
Don't know	28	14%
No impact	8	4%
No answer/response	11	6%
Base: All respondents (197)		

5.7 Future Plans

A question was included to establish if businesses were proposing to continue with any planned investments over the next 12 months. Although the question was not linked directly to the impact of Brexit, its position in the questionnaire immediately after the Brexit section may have led some to draw a link between leaving the EU and investment decisions. Around a quarter said that their business had *'no investments planned'* (27%), so it makes sense to remove these businesses from the calculations as the question isn't relevant to them. Once these businesses are removed, 65% said that they were proposing to continue, but 25% said that they were not and a further 10% were *'unsure'*.

Investment is seemingly more likely amongst larger businesses (those that employ 10 or more), only 13% of which said they had *'no investments planned'* (this compares with 32% amongst those with fewer than 10 employees). Amongst these larger businesses, once those with no planned investments are removed, 83% said that they were proposing to continue with planned investments over the next 12 months.

Respondents were asked to assess how staff numbers and turnover of their business were likely to change over the next 2 years and then over the next 5 years. Responses are summarised below;

Figure 7. Likely future changes in turnover

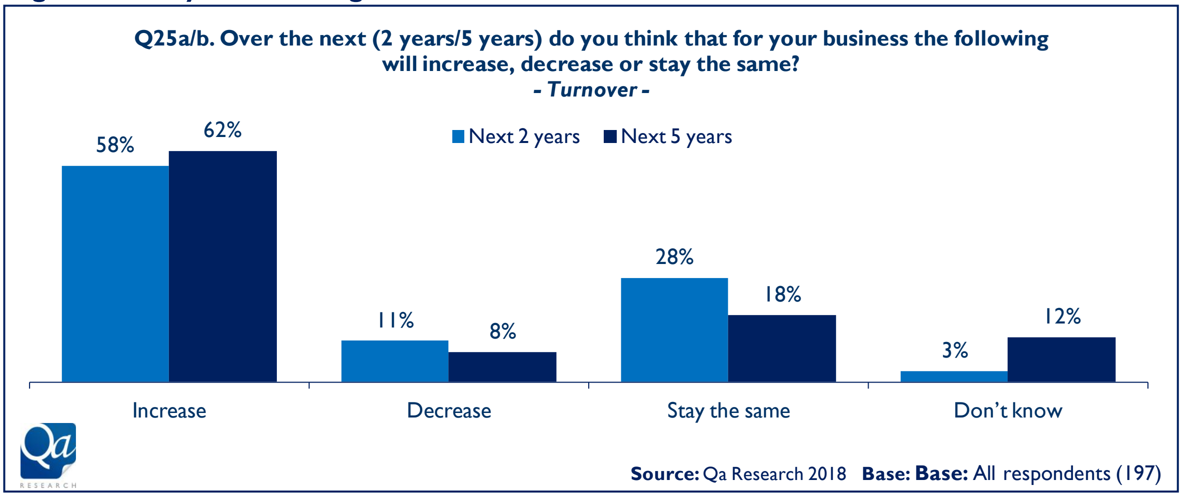
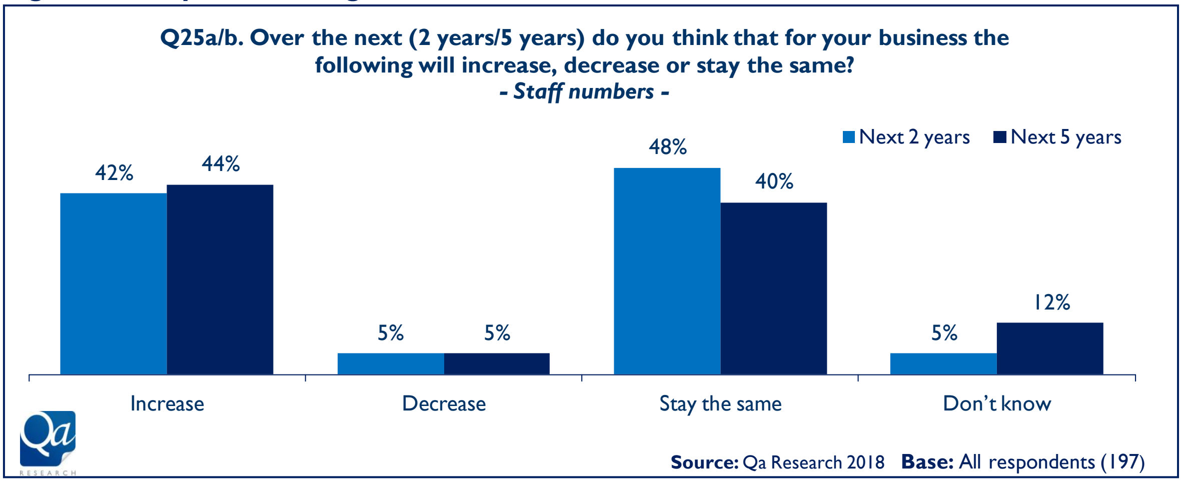


Figure 8. Likely future changes in staff



Generally, for each period, businesses are more likely to expect an increase in 'turnover' than an increase in *'staff numbers'*.

In total, 21 businesses expect to see a decrease in *'turnover'* in the next 2 years and 18 of these think that the Brexit will have a *'negative effect'* on their business. However in general, businesses that think Brexit will have a negative effect are actually more inclined to believe that their *'turnover'* will increase rather than decrease over the next 2 years (43% vs. 26%) and over the next 5 years (53% vs. 18%) suggesting that any negative effects won't necessarily impact their growth.

Comparison with 2016;

The proportion of businesses expecting an increase over the next 2 years was almost identical amongst 2016 and 2018 respondents for both *'turnover'* (2016: 60%, 2018: 58%) and *'staff numbers'* (2016: 43%, 2018: 42%). Also, over a 5 year period, the proportion expecting an increase in *'turnover'* was also comparable (2016: 65%, 2018: 62%).

However, 2018 respondents were significantly less likely to expect an increase in *'staff numbers'* over the next 5 years (2016: 55%, 2018: 44%).

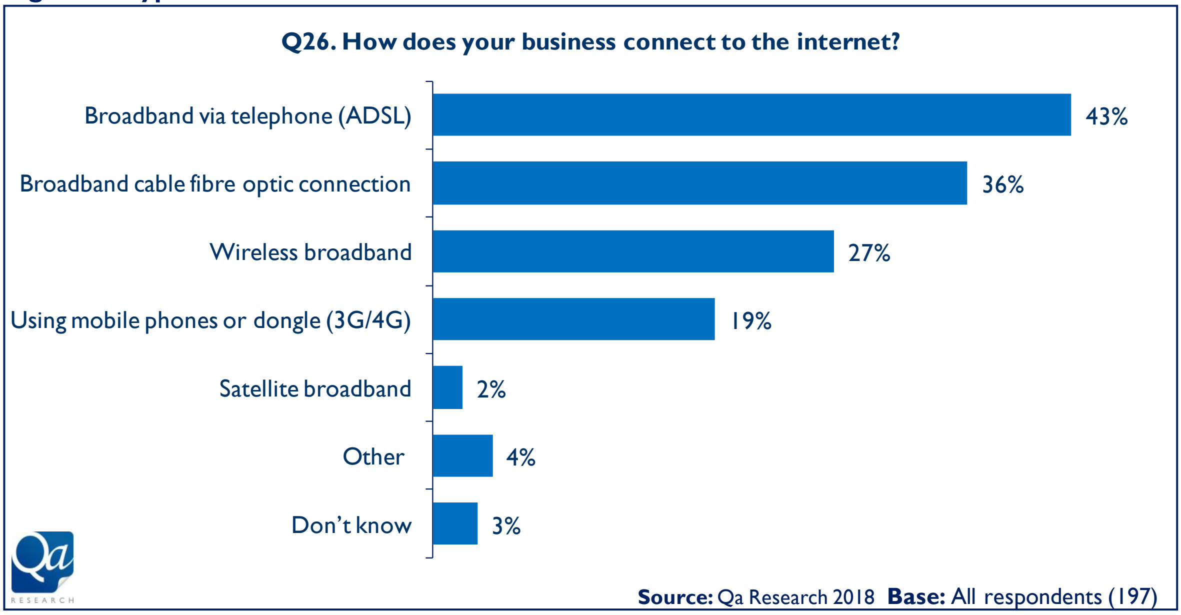
5.8 Broadband experience

Note on comparisons with 2016;

Data from 2016 included responses from businesses in non-targeted sectors and as such the 2016 and 2018 samples are not the same and therefore not comparable so no comparisons have been made.

The chart below shows the method used by businesses to connect to the internet;

Figure 9. Type of internet connection



It's notable that no one type of connection dominates responses here and businesses rely on a range of connection methods.

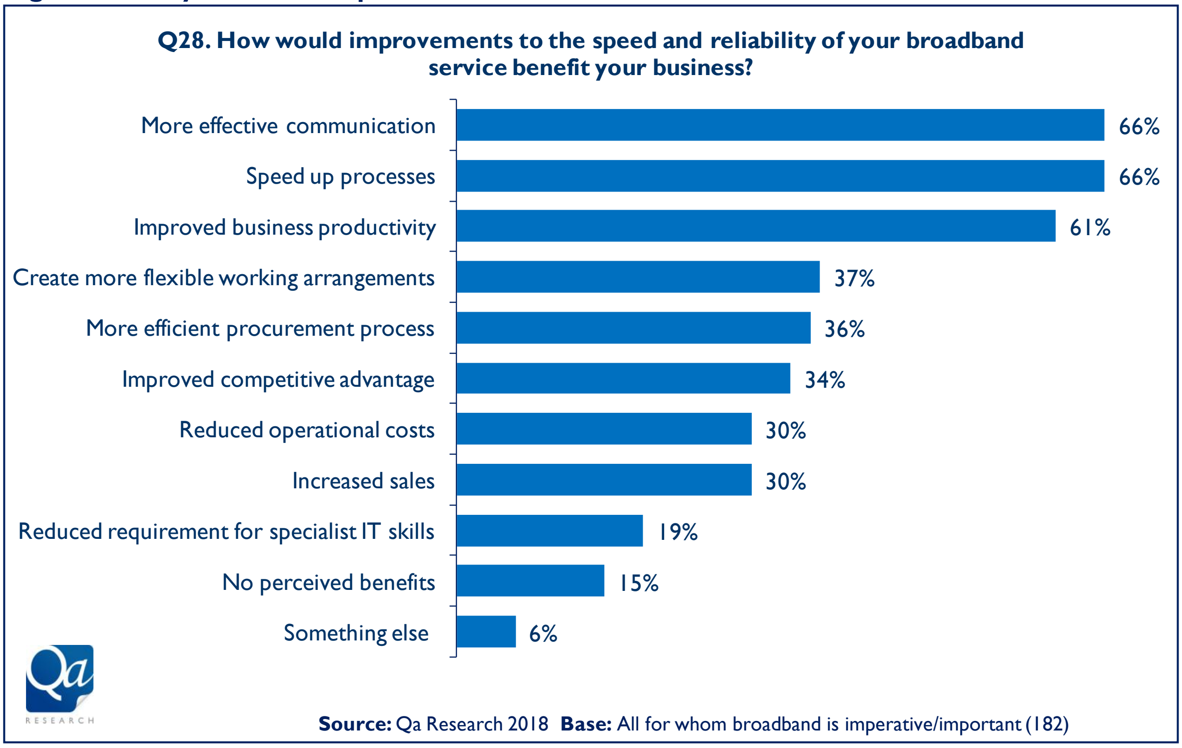
It's evident that *'fast, reliable broadband access'* is crucial to most businesses as 46% considered that it is *'imperative'* to their business and a further 35% felt it was *'very important'*. Most of the remainder felt it was only *'quite important'* (14%).

Notably, it was the 15 businesses operating from a *'warehouse'* that were the most likely to view broadband as *'imperative'* (12 said this and 2 more said it was *'very important'*).

In total, across these two questions 14 businesses said they never used the internet or that broadband was *'not at all important'*, which equates to 7% of all 2018 respondents.

Given the importance of fast, reliable broadband to businesses, it's no surprise that they were readily able to identify ways in which improvements to broadband speed and reliability would be of benefit and these are shown below;

Figure 10. Ways in which improvements to broadband would benefit business



The majority (62%) of businesses that use the internet said they did experience problems with their current broadband connection.

This was most likely to be *'reliability (e.g. dropping out, being disconnected)'* (a problem experienced by 34% of internet users) as well as issues with *'maximum speed'* (22%) and *'speed at different times of the day'* (22%).

Smaller businesses (those with fewer than 10 employees) were significantly more likely than larger ones to mention *'reliability (e.g. dropping out, being disconnected)'* (39% vs. 23%), although it should be highlighted that there was no difference in the proportion of each type of business that said they experience problems (62% for both).

Generally, problems with the internet were experienced by businesses located in all parts of the district including those based on business parks and industrial estates, as well as those based elsewhere.

5.9 Business support

At the end of the survey respondents were asked which, if any, free business events their business would find most beneficial and presented with a list of possible events.

The table below shows the levels of interest in each type of event amongst the total sample and then separately amongst businesses that said they had firm expansion plans or wanted to expand but felt expansion wasn't possible due to the availability of *'suitable premises'*;

Figure 11. Interest in business support events

Q30. Which of the following free business events would your business find most beneficial?	All respondents		Have firm expansion plans/can't expand due to lack of 'suitable premises'	
	N	%	N	%
Marketing and sales	66	34%	37	43%
Web use and social media	57	29%	28	32%
Health and safety	53	27%	31	36%
Local supply chain and procurement opportunities	51	26%	27	31%
Finance and tax	49	25%	26	30%
Exporting	27	14%	18	21%
Business networking	3	2%	1	1%
Personnel management	1	1%	1	1%
Access to information and advice	2	1%	1	1%
Access to funding	1	1%	1	1%
Net - Something else	7	4%	4	5%
None	59	30%	17	20%
Don't know	5	3%	2	2%
Base: All respondents	**197**		**87**	

Finally, at the very end of the survey respondents were given the opportunity to make any further comments they wished about the issues covered by the survey. This was a fully open question so similar verbatim comments have been coded into themes and these are shown in the table below;

Figure 12. Any other comments

Comments	N	%
Comment about broadband issues (speed, connectivity, cost) or poor mobile coverage	13	7%
Comment about scarcity of land, lack of suitable premises, high rent, or planning issues	13	7%
Complaint about Brexit or frustration with Brexit-related questions in this survey	8	4%
Request for greater availability of financial support or simplified grant application process	7	4%
Complaint about high business rates	5	3%
Comment about poor or unsuitable road infrastructure	5	3%
Comment about changing industrial landscape and business or market decline	3	2%
Specific query or comment directed to Derbyshire Dales District Council	3	2%
Generic positive comment about the survey	2	1%
Comment about recruitment issues	2	1%
Request for business support information	2	1%
Request for sight of survey results	2	1%
Generic negative comment about the survey	1	1%
Nothing	141	72%
Base: All respondents (197)		

Some example verbatim comments made at this question are shown below to give a flavour of the types of issues that came out at this question;

> *"Broadband connection is essential to the business, we need a fibre optic connection. If we don't get fibre connected broadband we may move to an area that does have it."*

> *"The braodband provision for rural businesses is a huge problem in the Derbyshire Dales."*

> *"Connectivity is important but so is more general support in the area such as business rates which I appreciate have been held for small businesses. If this changed my ability to stay in Derbyshire would come under question."*

> *"The lack of availability to reasonably priced business units. Most farmland barns have already been converted and industrial buildings bought by investors."*

> *"One of the most frustrating experiences has been applying for funding. We spent many hours applying for EU rural grants then these were withdrawn due to Brexit. Ultimately we've gone ahead self-funding the same project ourselves."*

> *"For businesses like us interested in purchasing land, to provide a gateway to access certain departments, where they could tell us where and when developments are happening, so we could decide in advance if it was suitable for us. We need more awareness and knowledge of what land is available. There is a general problem with land in our area."*

6. Conclusions and Recommendations

6.1 Conclusions

This survey provides data on the views and experiences of a **robust sample** of businesses operating from B Use Class premises and sites in the district.

As was the case in 2016, the 2018 survey highlights that **a wide range of businesses occupy this type of business accommodation** and this is not an homogenous business community. Instead, businesses range in size from sole traders to those with more than 250 employees and they operate in a wide range of market sectors.

However, generally, most of these businesses have fewer than 10 employees and they are most likely to operate in manufacturing, engineering, the service sector, construction, retail or creative and digital (between them, these sectors account for 70% of respondent businesses in 2018).

These businesses also occupy a range of different types of business accommodation, but half of all businesses that completed the survey are currently in either a *light industrial* unit or an *office (not serviced)*.

Eight-in-ten businesses express satisfaction with their current premises (an almost identical level to that recorded in 2016) and there is evidence that businesses on industrial estates and business parks and those in a serviced office are the most satisfied.

This is not to say that all businesses are happy with their current premises, as 25 of the 197 businesses surveyed did express some degree of dissatisfaction (19 of which are not located on an industrial estate or business park).

Notably, **a quarter of all businesses said that their operations are restricted by the size of their current premises** (although given the high levels of satisfaction it seems likely that many are simply working around this).

45% of businesses indicated that their current premises would no longer be suitable in 5 years' time or less. On the face of it this may suggest that many businesses will need to look for new premises in the coming years, but analysis of those businesses with expansion plans highlights that around a third felt they could expand their existing premises (subject to planning). This suggests that not all businesses that will find their current premises inadequate in the coming years will be looking to re-locate.

In total, 44% of all businesses that completed the 2018 survey said they had firm expansion plans or plans that are restricted because they can't find *'suitable premises'*.

Those businesses that have expansion plans that are likely to require new premises have a range of different needs and a range of sizes, quality grades, locations and tenures were preferred. That said, **37% of businesses considering expansion require *light industrial space*.**

Generally, they are likely to look for a similar type of premises (e.g. light industrial, serviced office etc.) to those which they currently occupy and the cost is considered to be the most important factor when choosing new premises.

The **majority of businesses either don't know how Brexit will affect their business or expect that there will be no change.**

However, those who envisage change are more likely to expect a negative rather than positive impact (**a third of all businesses expected a negative impact**) and of most concern would appear to be the cost of purchases, particularly if the strength of the pound continues to fall and/or import tariffs are imposed.

Despite some obvious concerns over the possible impact of Brexit amongst this group of businesses, the evidence suggests that most remain optimistic about the future. Amongst those expecting to make investments, **two-thirds said that they were proposing to continue with planned investments over the next 12 months.**

Additionally, over the next 2 years three-fifths of businesses expect their turnover to increase while around two-fifths feel that staff numbers would increase (although businesses were actually more likely to feel that staff numbers would simply stay the same, as half said this). These proportions are virtually identical to those recorded in 2016, suggesting that the UK's imminent exit from the EU isn't leading businesses to anticipate a slowdown in their growth.

Compared with a 2 year period, over a 5 year period very similar proportions expect turnover and staff numbers to increase. However, it does appear that **fewer businesses expect an increase over the next 5 years in staff numbers in 2018 than they did in 2016**, which might suggest concern about growth or staff recruitment (or both).

More generally, one-in-four businesses feel that their current operations are restricted due to recruiting staff and given that businesses with expansion plans expect to recruit on average around 7 new staff, it seems possible that the availability of suitable staff may pose a challenge for many looking to expand.

Finally, the **importance of fast, reliable broadband is evident throughout this survey**; it's either imperative or very important to eight-in-ten businesses and 85% that use the internet can highlight at least one way that better speed and reliability would benefit their business. Inadequate broadband is also the most frequently mentioned factor that currently restricts business operations, highlighting that improvement in the district would be welcome.

6.2 Recommendations

- Inevitably, there is no *'one-size-fits-all'* approach to the provision of business accommodation for those looking for Class B Premises, **so it will be important to ensure that a portfolio of different types, qualities and sizes of property exists to satisfy business**.
- There's a suggestion that those located on businesses parks and industrial estates feel they have no option but to move away when they outgrow their current premises, so it might be worth future developments building in provision for expansion if possible. However, it's recognised that commercial considerations often require than unit numbers are maximised from the outset and that this might not be possible.
- The importance of good, reliable broadband can't be understated, so any improvement in this is very likely to be welcomed by the majority of these businesses and likely to lead to tangible benefits in the way they can run their businesses.
- Any help the Council and its partners could offer businesses to recruit staff is likely to be welcomed, as 45% employing 10 or more consider that this restricts their current operations and more than two-fifths of businesses expect to increase staff numbers over the next 2 and 5 years.

7. Appendices

7.1 List of business taking part in the survey

QAID	Business Name
13	P&D Specialist Services Ltd
16	Hope Valley Health Club Ltd
21	C & A Design Ltd
25	Wirksworth Skip Hire
32	D J Engineering
37	Whitehouse Physiotherapy Clinic
40	Creation Studios
41	John Wardle Horological Materials
44	European Automation Projects Ltd
45	Codel international
48	RG Millward Ltd
50	Fanny and Clara Ltd
55	Heritage Antiques
57	17d Miniatures
63	Moy Park Ltd
72	Salisbury & Wood Ltd
74	Hangar 4 Ltd
76	Cem Solutions (Uk) Ltd
77	Spikey Entertainment Ltd
80	Curiousa Ltd
83	E T White & Sons Ltd
94	Mindflick Holdings Ltd
96	Descale and Chlorination Services Ltd
97	Cpj Environmental Services Ltd
101	Newtone Strings Gb
104	Adverse Camber Productions
106	Winster Foods
108	Avant Motor Bodies
114	Unity Coachworks
119	Derbyshire Dales Design and Print Ltd
124	The Woodlands Fitness Centre Ltd
126	In 21 Ltd
131	British Orienteering Federation Ltd
134	Vital Earth Gb Ltd
137	Intelligent Vending Ltd
141	Peak Ecology Ltd
142	Nenplas Ltd
144	Dental It Ltd
154	Hill Speed Racing Ltd
155	J.W. Long Engineering Ltd
156	J & J Automation Uk Ltd
157	Bakewell and Eyam Community Transport
158	Tool Hire Bakewell
167	Tractivity Limited
172	Midlec Ltd
179	Ray Howe Engineering (Ashbourne) Ltd
181	Commercial Language Training Ltd
189	Illuminaries Ltd
192	Employ Recruitment Uk Ltd
210	John Colley

QAID	Business Name
214	David Naylor
216	Wooliscroft Garage
223	Dales Gas & Electrical Services Ltd
239	Longcliffe Quarries Ltd
254	Zepnat Cycles
266	Read Interiors Ltd
273	Barkeng Mad Ltd
277	Peak Ales Ltd
318	Nrb Electrical Ltd
321	Hill Crest Projects Ltd
331	Anglo-Spanish Law
342	Bagshaws Llp
345	S Derbyshire & Partners
367	JA HARDY LTD
370	Isulu I
379	A P Rogers
401	D Hogg International Ltd
415	Adventure Medical Ltd
422	Matlock Meadows Ltd
430	Peak Inks Ltd
433	Avian on Line Ltd
446	The Laundry Room
450	Garton Decorators Ltd
477	William Lennon & Co. (Footwear Manufacturers) Ltd
488	Smq Media Pr & Services Ltd
491	Mypaye Ltd
492	Fine Grinding Ltd
493	William Twigg (Matlock) Ltd
500	Boith Ltd
501	Shaws Equestrian Ltd
510	Collaborative Resolution Ltd
521	Sudbury Gasworks Restoration Trust Ltd
530	Jhf Transport Services Ltd
535	Whitehouse Construction Company Limited
547	Derwent Valley Vets Ltd
571	Health & Safety Scaffold Services Ltd
578	Chromalux Blinds
579	J & J W Stafford
598	Steve's Printing & Film Transfer
605	Nick Marriott Associates
619	Robert Morton
621	Cressbrook Hall Cottages Ltd
627	H. J. Enthoven Ltd
632	Wigley Haulage Partnership
634	NAACRE
638	Buxton Architectural Stone Llp
643	Fruition Designs Ltd
657	Wye Valley Associates Ltd
658	Flamtek Ltd
659	Expertise Ltd

QAID	Business Name
662	Peak Uk Kayaking Company Ltd
664	Optimair Ltd
665	Adi Trading Ltd
669	R.P.D. Ltd
674	Marsh Brothers Engineering Services Ltd
676	H. & W. Sellors Ltd
679	Centreplain Ltd
684	David A Bradley Ltd
693	X.Act Systems Ltd
702	Medi-Kelsey Ltd
703	Michael I Holdsworth Limited T/A Holdsworth
708	I D Fencing Midlands Ltd
709	Dsf Refractories & Minerals Ltd
715	Beresfords flooring Ltd
721	Premier Gas Services (East Midland) Ltd
723	Bnbs Ltd
733	CW Jones & Son Ltd
734	R W Mercer & Co
742	The Identity Store Ltd
755	Resin Fix Ltd
766	P.A.C.C.S. Ltd
777	Churchwood Design
782	Pidcock Bros
788	Derbyshire Self Storage Ltd
790	Baslow Spa
793	B.J. Bloor (Quality Builder) Ltd
795	Elysion Ltd
807	Quiller Ltd
819	Le Strange Services Ltd
827	Brocklehurst Property Maintenance Ltd
839	Hartington Accountancy Services Ltd
844	Peak Safety Ltd
852	Peak Design Ltd
859	Rowandale of Wirksworth Ltd
875	T M S Europe Ltd
877	On A Wick and A Prayer Ltd
887	Active Country Group Ltd
931	Milner Off Road
945	Lovers Leap Garage
991	Poole & Sons Art & Antiques
1003	R & R Motors
1019	Ridgewood Auto Services Ltd
1023	Shaun Curtis Ltd
1084	Aerofix Paragliding Services Ltd
1093	The Sewing Barn
1120	Francis N. Lowe Ltd
1142	Indigo Furniture Ltd
1163	Hartdale Motors Ltd
1187	Ashbourne Secretarial & Printing Services
1195	Richard Webster Nutrition Ltd

QAID	Business Name
1210	C W Sellors (Gold & Silversmiths) Limited
1256	McKenzie's Garage Ltd
50001	Abbeydale Direct
50009	Aditi Studios
50010	Adventure Expeditions Ltd
50016	Alpha Omega Engineering
50021	Andrew Stuart & Co Ltd
50022	Anthony Wassell Glass
50024	Aquaman Design
50027	Arconic
50031	Ashbourne Recycled Air Filters
50033	ASHBROOK ROOFING & SUPPLIES LTD
50062	Brockweld Engineering LTd
50079	Chop Chop Chef Ltd
50088	Cobra fit (Ashbourne and Derby)
50091	COKE TURNER & CO LTD
50118	Dave Griffin Stained Glass Artist
50123	Derbyshire Concrete
50124	Derbyshire Geotechnical Ltd
50131	EDDISTONE CONSULTING LTD
50143	FIRST ASCENT (UK) LTD
50162	GRAPHIC WORKMAN LTD
50168	Hammer Design
50180	HEALTH TEC MEDICAL LTD
50194	Horse and Hen
50204	Industrial Water Equipment
50208	J & J AUTOMATION LTD
50213	JMJ OLDFIELD DESIGN LTD
50214	JOHN PALIN (WHOLESALE) LTD
50217	JPR Farm Direct
50220	KEMS AUTOS LTD
50228	MANSELL FURNITURE MANUFACTURERS
50260	Newburgh Engineering
50281	Peak Engineers
50301	Project75 Software Ltd
50317	Richard Walker cabinet maker.
50329	Shop Reddish
50334	SLATERS(PLASTIKARD)LTD
50335	Smart Gas Training
50343	SWUK Steel Decking Supplies Ltd
50357	THORNBRIDGE Brewery
50359	TIDESWELL WELDING SERVICES LTD
50365	Trailblazer360
50374	UK SLIPFORM LTD
50384	WATKISS THERMALBREAK LTD
50395	Wolseley
50396	Wye Bakehouse

7.2 Questionnaire

Derbyshire Dales District Council – Business Survey 2018

Good morning/afternoon. My name is xxxx and I'm calling from Qa Research. We have been commissioned to carry out a short survey on behalf of Derbyshire Dales District Council amongst businesses in the district.

The survey asks about your experience of running a business in the district, including the availability and quality of local premises and your experiences of local broadband.

The findings will help the council plan for development and growth, bid for external funding and shape future provision within the Derbyshire Dales.

May I speak to someone who has responsibility for making decisions about your business, such as where it's located, your premises and your future plans.

WHEN PUT THROUGH TO A POTENTIAL RESPONDENT ……..

Repeat the intro.

Can I just check, do you have at least some responsibility for decisions regarding your business's location, its premises and future plans.

We would really appreciate it if you would be able to spare some time to participate in this research. The interview should take no more than 12-15 minutes. Would it be convenient to conduct the interview now?

INTERVIEWER (IF REQUIRED): If you would like to speak to someone at the council about this research you can contact Nancy Maitland, Economic Development and Tourism Officer on 01629 761103 or at nancy.maitland@derbyshiredales.gov.uk

**This interview will be carried out according to the Market Research Society's Code of Conduct and all your answers and information you provide will be treated as confidential in accordance with the Data Protection Act and GDPR legislation.
Your answers will not be linked to your company, unless you give us permission to do so. At the end of the survey we'll also ask if you'd like someone at the council to contact you.**

The call may be recorded for quality purposes. Is that ok?

**The legal basis for this research is 'public task' and if you'd like to see a copy of the Privacy Information Document that accompanies this survey you can visit www.qaresearch.co.uk/TBC. This details the background to this research, how your data will be kept securely and your rights.
At the end of the survey you will be given the opportunity to request that someone at the council contacts you about the issues we'll discuss today.**

SCREENERS

First, we just need to ask you a few questions to ensure we speak to a good cross-section of local businesses.

S1. We have the name of your business as (*TEXT SUB FROM SAMPLE*), is that correct?
SINGLECODE
Yes
No (PROBE AND WRITE IN)
CODES OPEN

S2. Please could you confirm the postcode of your business site?
INTERVIEWER (IF REQUIRED): If your business operates from more than one site in the district please think about the main site or the biggest site. INTERVIEWER (IF REQUIRED): We will only use your postcode for analysis purposes to understand how businesses in different areas answer.
WRITE IN
CHECK POSTCODE AGAINST DATABASE FROM PAF

S3. Which of the following best represents the business sector you operate in? READ OUT
SINGLECODE
Agricultural
Educational
Financial
Manufacturing
Engineering
Leisure
Retail
Service
Hospitality and Tourism
Construction
Creative and Digital Industry
Food and Drink
Science and Medical
Low carbon
Something else (Please specify)
Don't know

S4. Please describe the exact nature of your business activity? What does the business make or do?
CODES OPEN

ASK ALL
S5. Including yourself, how many people does the business employ in the district? If you have multiple sites in the district then please tell me the total number across all those sites.
NUMERICAL RESPONSE

CODE TO BANDS BELOW
1–9

10–49
50–199
200–249
250+
Don't know

SECTION 1: Current Business Premises

The next few questions are about your current business premises.

Q1. What type of business accommodation do you have at your current premises? READ OUT
SINGLECODE
Office (not serviced)
Serviced office
General industrial
Light industrial
Warehouse
High tech lab
Undeveloped site/land
Something else (Please specify below)
Don't know

Q2. What is the floor-space of your business's current premises? READ OUT INTERVIEWER: ASK FOR PREFERENCE AND READ OUT METERS OR SQ. FEET
SINGLECODE
1-50 sqm / 10-540 sq ft
51-100 sqm / 541 – 1,100 sq ft
101-200 sqm / 1,101 – 2,150 sq ft
201-500 sqm / 2,151-5,400 sq ft
501-1,000 sqm / 5,401- 10,800 sq ft
1,001 or more sqm / 10,801 or more sq ft
Don't know

Q3. How satisfied or dissatisfied are you with your business's current premises? READ OUT
SINGLECODE – INVERT ANSWERS
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied
Don't know

Q4. Do any of the following factors currently restrict the operation of your business? READ OUT
MULTICODE – RANDOMISE ORDER
Inadequate broadband availability
Planning issues
Parking for staff
Parking for customers
Recruiting staff

Rents
Business rates
Business crime
Size of your current premises
Quality of your current premises
Anything else (Please specify)
Don't know

Q5. How long do you think that your current premises will be adequate for your business? READ OUT
SINGLECODE
2 years
5 years
10 years
Not adequate now
Other (Write in)
Don't know

SECTION 2: Future Business Accommodation Needs

The following questions are about your business's accommodation needs in the future.

Q6. Do you currently have plans to expand your business? READ OUT
SINGLECODE
Yes
No, because you don't need to
No, because you are not able to find suitable premises
Prefer not to say
Don't know

ASK Q7 IF 'Yes' OR 'No, because you are not able to find suitable premises' AT Q6, OTHERS GOTO Q21
Q7. Does your business require any of the following to expand? READ OUT
MULTICODE
Additional land
New premises
Expanding your existing premises
Prefer not to say
Don't know
ASK Q8 IF 'Additional land' AT Q7, OTHERS GOTO Q9
Q8. As you require additional land, approximately what size of site do you require?
INTERVIEWER: Enter one value only below.
ENTER VALUE IN ACRES
ENTER VALUE IN SQUARE FEET
ENTER VALUE IN SQUARE METERS
Prefer not to say
Don't know

ASK Q9-16 IF 'New premises' AT Q7, OTHERS GOTO Q17

Q9. What type of new premises do you require? READ OUT

MULTICODE

Office (not serviced)
Serviced office
General industrial
Light industrial
Warehouse
High tech lab
Undeveloped site/land
Something else (Please specify below)
Don't know

Q10. What size of new premises do you require?
INTERVIEWER: ASK FOR PREFERENCE AND READ OUT METERS OR SQ. FEET

SINGLECODE

1-50 sqm / 10-540 sq ft
51-100 sqm / 541 – 1,100 sq ft
101-200 sqm / 1,191 – 2,150 sq ft
201-500 sqm / 2,151-5,400 sq ft
501-1,000 sqm / 5,401- 10,800 sq ft
1,001 or more sqm / 10,801 or more sq ft
Don't know

Q11. What quality of new premises do you require? READ OUT

SINGLECODE

Prestige
Good quality
Average
Basic budget
No preference
Don't know

Q12. What would your preferred tenure be? READ OUT

SINGLECODE

Freehold
Leasehold
No preference
Don't know

Q13. Broadly speaking, where would you like these new premises to be located, for example Matlock, Bakewell, Wirksworth, Ashbourne, Hathersage etc..

CODES OPEN

Q14. To find new premises, would your business be willing to relocate from its current location in the district to another one within the district?

SINGLECODE

Yes
No
Don't know

ASK Q15 IF 'Yes' AT Q14, OTHERS GOTO Q16

Q15. How far away would you be willing to relocate to? READ OUT

SINGLECODE

Upto 5 miles
Upto 10 miles
Upto 20 miles
More than 20 miles
Don't know

Q16. What type of location would the business prefer for the new premises? READ OUT

SINGLECODE

Town centre
Edge of town centre
Business park
Industrial estate
Rural location
Somewhere else (Please specify)
Don't know

ASK Q17 IF 'Yes' OR 'No, because you are not able to find suitable premises' AT Q6, OTHERS GOTO Q21

Q17. Would the potential expansion of your business involve additional jobs being created?

SINGLECODE

Yes
No
Don't know

ASK Q18 IF 'Yes' AT Q17, OTHERS GOTO Q19

Q18. How many jobs would you expect it to create in total and how many of these would you consider to be high skilled? Please include full-time, part-time and casual.

TOTAL - NUMERIC RESPONSE

HIGH SKILLED - NUMERIC RESPONSE (MUST BE =/< THAN TOTAL)

Don't know

Q19. Which THREE of the following factors are most important to your business when selecting new premises? READ OUT

MULTICODE – RANDOMISE ORDER (MAX 3)

Broadband provision
Cost of premises
Good road infrastructure
Access to public transport
Staff availability
Business support
Funding availability
Car parking
Opportunity for expansion
Planning permission in place
Business rates
Something else (Please specify)
Don't know

Q20. If new premises became available in the next 2 years which meet with your requirements, would your business...READ OUT
SINGLECODE
Almost certainly take up these premises
Consider taking these premises
Not take up these premises
Prefer not to say
Don't know

SECTION 3: Business Outlook

The next few questions ask about the possible impact of Brexit on your business.

Q21. In general, what do you think the overall effect of Brexit will be on your business? READ OUT
SINGLECODE
Positive effect
Negative effect
No change
Don't know

Q22. Here is a list of ways that Brexit might impact on businesses in general. For each one, please tell me how much you think it might impact your business by giving your answer on a scale of 1 to 10, where 1 means it will have no impact and 10 means it will have a very big impact. If it's not applicable please say so.
SINGLECODE
1 – No impact
2
3
4
5
6
7
8
9
10 – Very big impact
Not applicable
Don't know

LOOP – RANDOMISE ORDER
Cost of purchases if import tariffs are imposed
Cost of purchases if the strength of the pound continues to fall
Access to labour from the EU
Ease of doing trade with the EU
Changes to regulations or industrial and consumer standards
Disruption to contracts
Opportunity to gain new markets outside EU
Something else (write in)

Q23. What is the single biggest way that Brexit could affect your business, whether positively or negatively?
CODES OPEN

Q24. Are you proposing to continue with any planned investments in the business over the next 12 months?
SINGLECODE
Yes
No
Unsure
No investments planned
Don't know

Q25a. Over the next 2 years do you think that for your business the following will increase, decrease or stay the same? READ OUT
SINGLECODE
Increase
Decrease
Stay the same
Don't know

LOOP - RANDOMISE
Turnover
Staff numbers

Q25b. What about over the next 5 years? READ OUT
SINGLECODE
Increase
Decrease
Stay the same
Don't know

LOOP - RANDOMISE
Turnover
Staff numbers

SECTION 4: Your Broadband Experience
The final few questions are about your business's use of the internet.

Q26. How does your business connect to the internet? READ OUT
SINGLECODE
Broadband via telephone (ADSL)
Broadband cable fibre optic connection
Using mobile phones or dongle (3G/4G)
Wireless broadband
Satellite broadband
Other (Please specify)
Don't know

Q27. How critical is access to fast, reliable broadband to your business? READ OUT
SINGLECODE
Imperative
Very important
Quite important
Not important at all
Don't know

ASK Q28 IF 'Imperative', 'Very important' OR 'Quite Important' AT Q27, OTHERS GOTO Q27

Q28. How would improvements to the speed and reliability of your broadband service benefit your business? READ OUT

MULTICODE – RANDOMISE ORDER

Increased sales
Reduced operational costs
More efficient procurement process
Improved business productivity
Reduced requirement for specialist IT skills
Speed up processes
Improved competitive advantage
Ability to create more flexible working arrangements
More effective communication
Something else (Please specify)
No perceived benefits
Don't know

Q29. What, if any, problems do you experience with your current broadband service? DO NOT READ OUT

MULTICODE

Maximum speed
Speed at different times of the day
Reliability (e.g. dropping out, being disconnected)
Multiple users using limited capacity
Mobile network coverage
Other (Write in)
None
Don't know

SECTION 5: Business Support

Q30. Which of the following free business events would your business find most beneficial?

SINGLECODE

Finance and tax
Marketing and sales
Web use and social media
Health and safety
Exporting
Local supply chain and procurement opportunities
Something else (Please specify)
None
Don't know

Q31. Are there any other comments you'd like to make about the issues covered by this survey?

CODES OPEN

D1. Finally, if you would like, someone at Derbyshire Dales District Council could contact you to discuss any of the specific points you have raised in your survey responses. To enable this to happen, you need to give me permission to pass your answers on to the council.

Do you give consent for us to pass back your answers in an identifiable way to Derbyshire Dales District Council so they can contact you?
SINGLECODE
Yes
No

ASK D2 IF 'Yes' AT D1, OTHERS THANK AND CLOSE
D2. Can I take some contact details please?
Name:
Phone:
Email:

Thank you for taking the time to complete this survey.