



Research Report

Greater Manchester Business Survey 2013 – Greater Manchester data

**Prepared for: Business Growth Hub,
Manchester City Council, Rochdale
Council, Trafford Council and New
Economy**

Supported by the
 Regional Growth Fund



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Greater Manchester Business Survey 2013 – Greater Manchester data

Prepared for: Business Growth Hub, Manchester City Council, Rochdale Council, Trafford Council and New Economy

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Prepared for:



**new
economy**

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1 Executive Summary

1.1 Background and objectives

The aims of the project were to deliver a Greater Manchester (GM) wide business survey that provided data on current and future economic performance and to identify the opportunities and barriers to growth across a range of themes including existing and potential support services, trade and internationalisation, barriers to enterprise and innovation and employment and skills.

Key partners for this project included Greater Manchester's - Business Growth Hub, Manchester City Council, Rochdale Council and Trafford Council; and the survey was also part funded by the Regional Growth Fund and City Deal.

1.2 Methodology

1,224 telephone interviews were undertaken with employers across Greater Manchester. The survey sample was restricted to private sector businesses and voluntary/non profit-making organisations with at least one employee. Survey responses were establishment based, i.e. they were based on activities and practices undertaken at that site only.

Quotas were set by size (number of employees) and sector. The target number of interviews with medium/large employers (50+ employees) was boosted to ensure robust data within this group.

The majority of contacts were provided by the client and were an extract of records from the Fame and Mint databases.

Fieldwork took place in November and December 2013. Interviews were conducted with the most senior person in day to day control of the business at that site.

Once interviewing was complete, the data was weighted by size and sector within each district (or grouped set of districts where appropriate) to ensure that it was representative of the local business population.

1.3 Profile of Manchester businesses surveyed

Key profile of Greater Manchester employers taking part in the survey:

- The main sectors are the wholesale/retail (19%) and professional services (14%);
- 77% of businesses have 1 to 10 employees;
- 69% are private limited companies, limited by shares;
- 46% of businesses have been trading for over 20 years and 23% for between 11 and 20 years;
- 58% of businesses are single site; 33% are branches/subsidiaries and 9% a head office; and
- 21% are growth businesses, defined as having experienced 10% or more employment or turnover growth in the last 12 months.

The spread of businesses by area is as follows:

Manchester	501
Rochdale	185
Trafford	186
Remaining districts in Greater Manchester	352
Total	1,224

1.4 Business growth

1.4.1 Change in employment in the last 12 months

There has been an increase in the proportion of employers in Greater Manchester reporting an increase in the number of staff employed in the last 12 months since 2012 (from 17% to 22%). Nearly two-thirds of Greater Manchester employers (63%) report no change in their staff numbers, while 15% report a decrease.

On average, workforces have increased by 26%, while the average decrease was 30%.

1.4.2 Change in turnover in the last 12 months

More than a third of employers in Greater Manchester (35%) reported an increase in turnover in the last 12 months, which is the same proportion that was reported in 2012. There has been a reduction in the proportion citing a decrease in turnover since 2012 (23%, compared with 26%). There has been little change in the last 12 months in terms of turnover growth. On average, employers reported an increase of 19% in turnover, with a similar average reduction reported by those reporting a decrease (20%).

1.4.3 Anticipated change in employment in next 12 months

A quarter of employers in Greater Manchester (25%) anticipate an increase in the number of staff in the next year and this suggests a slightly more optimistic outlook than at the same time last year (when 21% anticipated an increase). The average increase is expected to be by just over a quarter of the current workforce size. Just 5% anticipate a decrease in employment in the next 12 months.

1.4.4 Anticipated change in turnover in next 12 months

Half of all employers in Greater Manchester (50%) anticipate increasing their turnover in the next 12 months, with the average level of anticipated increase equivalent to 18% growth. This suggests much greater optimism compared with the survey results for 2012 (43% anticipating an increase then). Just 7% of employers anticipate a decrease in turnover in the next year, with the average level of anticipated decrease to be 22%.

Businesses in wholesale/retail have been most likely to report turnover growth in the last 12 months, while the information/communication sector and manufacturers are most likely to be positive about turnover growth going forward.

1.5 Growth issues

1.5.1 Drivers of, and barriers to, growth

Around half of Greater Manchester employers highlight the products and services their company provides (53%) and their workforce and skills (47%) as the main drivers of growth. Three in ten employers (30%) highlight their approach to business strategy as the key driver for growth.

The three main barriers to growth cited by respondents were need for finance for their business, reported by over a quarter of businesses (28%), with over a quarter (27%) citing access to markets and sales opportunities, and just under a quarter (24%) stating a lack of staff or skills. The proportion reporting business finance as a barrier to growth was down from the 2012 survey, where over a third (36%) cited this as their key challenge.

1.5.2 Financing growth

Around one in seven employers in Greater Manchester (15%) had sought finance for their business during the last 12 months. This is a slightly lower proportion than in 2012 (18%). The mean amount of finance sought was £392,000, which compares with a higher figure (£513,000) in 2012. Finance was most commonly sought for working capital/cash flow (37%).

Four in ten that had sought finance (40%) reported difficulties arranging it during the last 12 months. This is a lower proportion than that reported in 2012 (49%). The most significant issue in obtaining finance stated by firms is that it is simply not available (35%). Banks/debt and internal capital are the most common ways of accessing finance to support business growth. However, friends and family still remain an important source of finance when starting up a business.

1.6 Local area and community

1.6.1 Satisfaction with local area

When asked to rate a range of aspects of their local area, Greater Manchester employers were particularly positive about road transport access, access to public transport and the quality of their premises. They were least positive about the availability of parking, crime and anti-social behaviour, the image of their area and business rate costs.

More than half of Greater Manchester employers (54%) reported having experienced at least one incident of major business disruption in the last 12 months. Transport and congestion was the most commonly cited factor (25% of all businesses). Transport/storage businesses are significantly more likely to have experienced major disruption through transport and congestion, and from severe weather conditions.

The majority of employers (61%) have plans in place to ensure that key functions continue in the event of serious disruptions (i.e. Business Continuity Plan). In more than half of these cases (36% of all) these plans have been tested. The propensity to have a Business Continuity Plan in place increases with business size, from 54% of businesses with between 1 and 10 employees, to 78% of businesses with between 11 and 49 employees, and 94% of all businesses with 50 or more employees.

1.6.2 Potential relocation

One in nine employers (11%) is currently considering relocation. This proportion is lower than that reported in 2012 (15%). The two main reasons given for considering relocation include the fact that their current premises are too small (36%) and the cost of current premises (15%). The majority of employers seeking to relocate (64%) intend to relocate within their current local authority area if at all possible. Only a small minority (i.e. 2% of all employers) are looking to move somewhere outside the Greater Manchester area.

1.6.3 Support for the local economy and community

More than four-fifths of Greater Manchester employers reported that their business currently actively reduces company waste (88%; 84% in 2012) and actively tries to improve their energy efficiency (87%; 81% in 2012), while two-thirds currently consider the environmental impact of their buying decisions (65%; 63% in 2012).

However, compared with 2012, they are significantly more likely to support local community groups (59%, compared with 37%) and slightly more likely to promote local trading (59%, compared with 55%) or help local residents get back into work (30%, compared with 24%). They are less likely than they were in 2012 to actively try to reduce work related car emissions (56%, compared with 60% in 2012). A third (33%) of businesses said they supported work with local schools, similar to the level reported in 2012 (32%).

1.7 Business support

1.7.1 Use of business support and advice in the last 12 months

Around half of employers in Greater Manchester (49%) have used professional support and advice organisations in the last 12 months. This rises to 60% in businesses that have been established for no more than 3 years.

Accountants/solicitors were most frequently used business services (22%). With regards to specific areas of support, firms were most likely to have sought advice and support for workforce skills and training (34%), and business networking (29%).

In terms of likely usage in the next 12 months, employers said that they wanted to focus more on increasing sales through marketing. Just under a third (30%) of all employers consider it likely they will seek support and advice in this area, while slightly fewer said they may seek support and advice on workforce skills and training (28%), business networking (26%) and expanding the workforce, recruitment/job creation, including the recruitment of apprenticeships (26%).

The two main reasons for not seeking business support or advice reflect a lack of need. More than half (55%) of those that have not sought support said they were confident they had no need for support; and a third (33%) consider that they already have sufficient in-house expertise to meet their business needs.

Only around a quarter of those that have sought business support or advice have paid for it, and average spend was estimated to be valued at £14,000 per annum. Just 6% of those that have used support or advice had difficulties obtaining it. This compares with 10% in 2012. The two main problems obtaining support were 'determining the support and advice required' (37%), and the 'cost of business support' (28%).

1.7.2 Business mentoring

One in ten Greater Manchester employers (10%) had used a business mentor in the last 12 months. This is a similar proportion to that reported in 2012 (9%). Business mentors were most likely to have helped businesses in terms of developing plans and strategy (29%). Only a very small minority of respondents are currently acting as (4%), or considering becoming (2%), a business mentor.

1.8 Export, trade and connectivity

1.8.1 Relationships with international markets and emerging economies

One in five Greater Manchester employers (19%) has current dealings with international markets. This is a similar proportion to that reported in 2012 (20%). Just 4% of employers have plans to deal with international markets in the future (6% in 2012). Three-fifths of employers with international dealings export (60%); and just over two-fifths (42%) has import links. Links are most prevalent with Europe-based markets (four-fifths with links), while two-fifths have dealings with China and North America.

One in seven Greater Manchester employers (15%) have an interest in developing business links with BRIC countries (i.e. Brazil, Russia, India and China), or other emerging economies.

1.9 Innovation and technology

1.9.1 Innovation activities undertaken or planned

Three-quarters of Greater Manchester employers (74%) have engaged in innovation activities in the last 3 years. This compares with almost four-fifths (79%) in 2012. Innovation activities are most likely to have included investing in new machinery/plant/ICT equipment/software (57%, compared with 63% in 2012) and training which support the development or introduction of new products, services / business and process improvement (49%, compared with 45% in 2012). A similar proportion of Greater Manchester employers (76%) plan to undertake innovation activities in the next 3 years (77% in 2012). The main planned innovation activities reported reflect those that are already being undertaken in 2013.

1.9.2 Constraints to innovation

More than two-fifths of all Greater Manchester employers (43%) have experienced some constraints on innovation (68% in 2012). Lack of finance was the most frequently mentioned (23%), with one in eight mentioning the cost of new product or service development (14%), or a lack of qualified personnel (13%).

1.9.3 Internet connection and barriers to adopting digital technologies

More than a quarter of employers in Greater Manchester (28%) have considered getting a faster or more reliable connection to the internet (26% in 2012). Around half of these employers (13% of all) are currently organising a faster connection. Around a third of Greater Manchester employers (34%) report barriers to adopting digital technologies that would improve their business if addressed (including better broadband and cloud services). Local connectivity speed is most frequently mentioned as a barrier (15%), with a similar proportion citing lack of general investment (14%).

1.10 Recruitment and skills

1.10.1 Staff training activity

Nearly three-quarters of Greater Manchester employers (71%) have provided internal training in the last 12 months (44% in 2012) and around two-fifths (39%) have provided external training (41% in 2012). Overall, 79% of employers in Greater Manchester have provided any training in 2013, significantly higher than the level (60%) in 2012.

1.10.2 Work positions requiring degree level skills or higher

A third of Greater Manchester employers (32%) reported having no work positions that require degree level skills or higher in their workplace (38% in 2012). One in eight employers (12%) reported that all their staff are required to have degree level or higher (14% in 2012).

1.10.3 Employment of apprentices

One in six Greater Manchester employers (16%) currently employs an apprentice (20% in 2012). However, employers were slightly less likely to employ younger apprentices aged 16 to 18, compared with apprentices aged 19 to 24. Of those employers not currently supporting any apprentices, 15% consider that they are likely to employ apprentices in the future.

1.10.4 Recruitment methods and recruitment difficulties

In terms of how employers in Greater Manchester recruit, word of mouth and advertising via regional and national press were the most frequently cited ways of hiring – cited by over a quarter (28%) of employers. Whereas, slightly fewer employers mentioned recruitment via the jobcentre or Universal Jobmatch online (26%).

Just 6% of Greater Manchester employers had any hard-to-fill vacancies at the time of interviewing. This is the same proportion as reported in 2012. They are most likely to have experienced recruitment difficulties for professional occupations, followed by skilled trades.

The predominant reason for recruitment difficulties has been ‘a low number of applicants with the required skills/qualifications’ (47%). Skills required are most likely to have been those relating to technical/specialist/craft skills (67%).

1.10.5 Skills gaps

Around one in five Greater Manchester employers (22%) reported skills gaps within their workforce and these covered a range of skill areas, with the most frequently cited being in technical/specialist/craft skills. This figure is much higher than the level of workforce skill gaps (15%) reported in the national Employer Skills Survey (UKCES 2013).

1.10.6 Comparison with 2012

The figure below compares 2013 data with that of 2012. A green shaded cell suggests an improvement or a move in an otherwise positive direction in 2013; while a red shaded cell suggests a deterioration, or a move in an otherwise negative direction in the last 12 months.

In summary, the comparison suggests improving employment in Greater Manchester, and rising sentiments about future business performance compared with 2012. Perceptions on barriers to growth, such as access to finance, still remain important but have fallen compared with the previous year.

Satisfaction with Greater Manchester as a 'good place to do business' has increased significantly over the last 12 months, reflecting the improving optimism shown by firms across all sectors. Key drivers of change include rising satisfaction with public transport and road transport access, however business rates and image of local area still remain the factors where businesses are least satisfied.

Challenges still remain in terms of internationalisation and growing overseas trade links, with one-in-five businesses stating that they have export, import and other international links – the same level as reported in 2012. Skills issues also remain a barrier to growth with almost a quarter (24%) of firms citing this as a major challenge to developing their business. Despite this, almost two fifths (39%) said they had arranged external training; and there was a significant increase in the proportion of firms stating they had arranged internal training (71%) compared with last years survey.

Figure 1: Year on year comparison

Greater Manchester Business Survey – Key Statistics and Trends	2013	2012
Changes in staff in the last 12 months		
Increase	22%	17%
Decrease	15%	15%
Stayed the same	63%	69%
Changes in staff the next 12 months		
Increase	25%	21%
Decrease	5%	6%
Stayed the same	66%	69%
Changes in turnover in the last 12 months		
Increase	35%	35%
Decrease	23%	26%
Stayed the same	32%	34%
Changes in turnover in the next 12 months		
Increase	50%	43%
Decrease	7%	11%
Stayed the same	33%	39%

Greater Manchester Business Survey – Key Statistics and Trends	2013	2012
Main drivers for growth		
Products and services the company provides	53%	57%
Workforce and Skills	47%	48%
Main barriers to growth		
Access to finance for business	28%	36%
Lack of access to markets and sales opportunities	27%	30%
Satisfaction with local area		
Public transport	66%	55%
Road transport	69%	57%
Dissatisfaction with local area		
Availability of parking	34%	31%
Crime and anti-social behaviour	32%	29%
Business rate costs	23%	24%
Image of area	28%	26%
Whether considering relocating		
Yes	11%	15%
Trades internationally		
Has export, import and other international links	19%	20%
Business and communities		
Actively reduce company waste	88%	84%
Actively try to improve energy efficiency	87%	81%
Consider the environmental impact of buying decisions	65%	63%
Support local community groups ³	59%	37%
Support local schools ⁴	32%	33%
Support residents back into work ⁵	30%	24%
Training in the last 12 months		
Internal training	71%	44%
External training	39%	41%
Any training	79%	60%

Significantly higher results that suggest improvement or a move in an otherwise positive direction are shaded in green; significantly higher results that suggest deterioration are shaded in red

2 Introduction

2.1 Background and objectives

The aims of the project were to deliver a GM-wide business survey that provided data on current and future economic performance and to identify the opportunities and barriers to growth across a range of themes including: existing and potential support services, trade and internationalisation, barriers to enterprise & innovation; and employment and skills.

There were a number of key partners for this project who required the study to deliver specific data for their local area or on particular themes, ensuring a robust and representative sample and providing data down to neighbourhood level. These included the Business Growth Hub, Manchester City Council, Rochdale Council and Trafford Council.

The survey is part funded by the Regional Growth Fund and City Deal.

2.2 Methodology

1,224 telephone interviews were undertaken with businesses across Greater Manchester. The survey sample was restricted to private sector businesses and voluntary/non profit-making organisations with at least one employee. Survey responses were establishment based, i.e. they were based on activities and practices undertaken at that site only.

Quotas were set by size (number of employees) and sector, based on Standard Industrial Classification 2007 (SIC 2007) within the four key districts/grouped districts, using ONS Inter Departmental Business Register (IDBR) statistics.¹ According to IDBR data, there are 70,096 businesses in Greater Manchester (13,765 in Manchester, 4,865 in Rochdale, 8,335 in Trafford and 43,131 in the remaining districts). The 1,224 interviews were distributed thus:

Manchester	501
Rochdale	185
Trafford	186
Remaining districts in Greater Manchester	352
Total	1,224

The target number of interviews with medium/large businesses (50+ employees) was boosted to ensure robust data within this group. Targets were also set for growth businesses across Greater Manchester, with 160 interviews achieved in Manchester and 193 in other districts, 353 in total.²

¹ Data provided by New Economy, dated 2012.

² Where turnover or number of employees had increased by 10%+ in the last 12 months

Furthermore, the regeneration areas within the City of Manchester were given targets to ensure a good geographic spread of businesses, and to allow comparison with the 2012 survey. The following sample sizes were achieved:

Central	64
City Centre	178
North East Manchester	59
North Manchester	64
South Manchester	83
Wythenshaw	49
Total	497

Trafford also set targets according to whether the business was located in the district, within Trafford Park, or within the Trafford Shopping Centre, as follows:

Trafford Centre	10
Trafford Park, excluding Trafford Centre	39
Trafford District, excluding Trafford Park & Trafford Centre	137
Total	186

The majority of contacts were provided by the client and were an extract of records from the Fame and Mint databases. Fieldwork took place in November and December 2013, with 26 interviewers working on the survey. Interviews were conducted with the most senior person in day to day control of the business at that site.

Once interviewing was complete, the data was weighted by size and sector within each district (or grouped set of districts where appropriate) to ensure that it was representative of the local business population. Appendix 6 summarises the number of interviews completed and the sample bases following weighting of the data. The data was weighted using IDBR statistics (2012) provided by the client.

2.3 Report contents

This report contains a written summary of the Greater Manchester data set.

Graphs and tables are used throughout the report to assist explanation and analysis. Although occasional anomalies appear due to 'rounding' differences, these are never more than +/-1%. These occur where, for example, rating scales have been added to calculate proportions of respondents who expressed satisfaction with an issue (e.g. the total who said either very or fairly satisfied).

Sample bases in graphs and tables are the unweighted sample sizes (in order to be able to calculate confidence intervals). The data itself is weighted data, unless specified otherwise.

In addition to this written report, separate data reports have been produced, which show the total results for each question and also the results cross-tabulated by the following respondent sub groups:

- Industry group and sector (SIC 2007);
- No. employees at the site;
- District;
- No. of sites;
- Location of HQ;
- Age of business;
- Whether trades overseas;
- Innovation activities in the past three years;
- Whether uses the internet;
- Employment of apprentices
- Whether obtained business advice in the last 12 months;
- Whether considering relocation;
- Training activity;
- Growth in the last 12 months;
- Type of business (business or voluntary sector); and
- Manchester Regeneration areas.

Where appropriate, comparisons are made between the survey findings, including those of previous Greater Manchester business surveys (in particular, 2012); and findings from the UK Business Barometer.³

The Business Barometer is a survey which follows up around 500 respondents from the biennial UK Small Business Survey (2012) at six monthly intervals. The June/July 2013 Business Barometer are the most recently available statistics to use as a comparison.

It should be borne in mind that the Barometer is based on SMEs; which is to say, it does not include establishments with 250 or more employees, while the Greater Manchester Business Survey is based on all employers, including those with 250 or more employees.

To highlight any significant differences in results throughout this report, the figures shaded in tables and in bold font in graphs indicate that they are significantly higher than average (e.g. GM or national average depending on context), or a significant change between 2012 and 2013.

In tables, a green shaded cell suggests an improvement or a move in an otherwise positive direction in 2013; while a red shaded cell suggests a deterioration, or a move in an otherwise negative direction in the last 12 months.

The Appendices include a set of summary results for growth businesses (10%+ growth in turnover and/or employment), those based in the City of Manchester, in Trafford, and in Rochdale.

³ BIS (2013): UK Business Barometer <https://www.gov.uk/government/publications/sme-business-barometer-june-2013>

3 Business growth

3.1 Change in employment and turnover in the last 12 months

3.1.1 Change in employment in the last 12 months

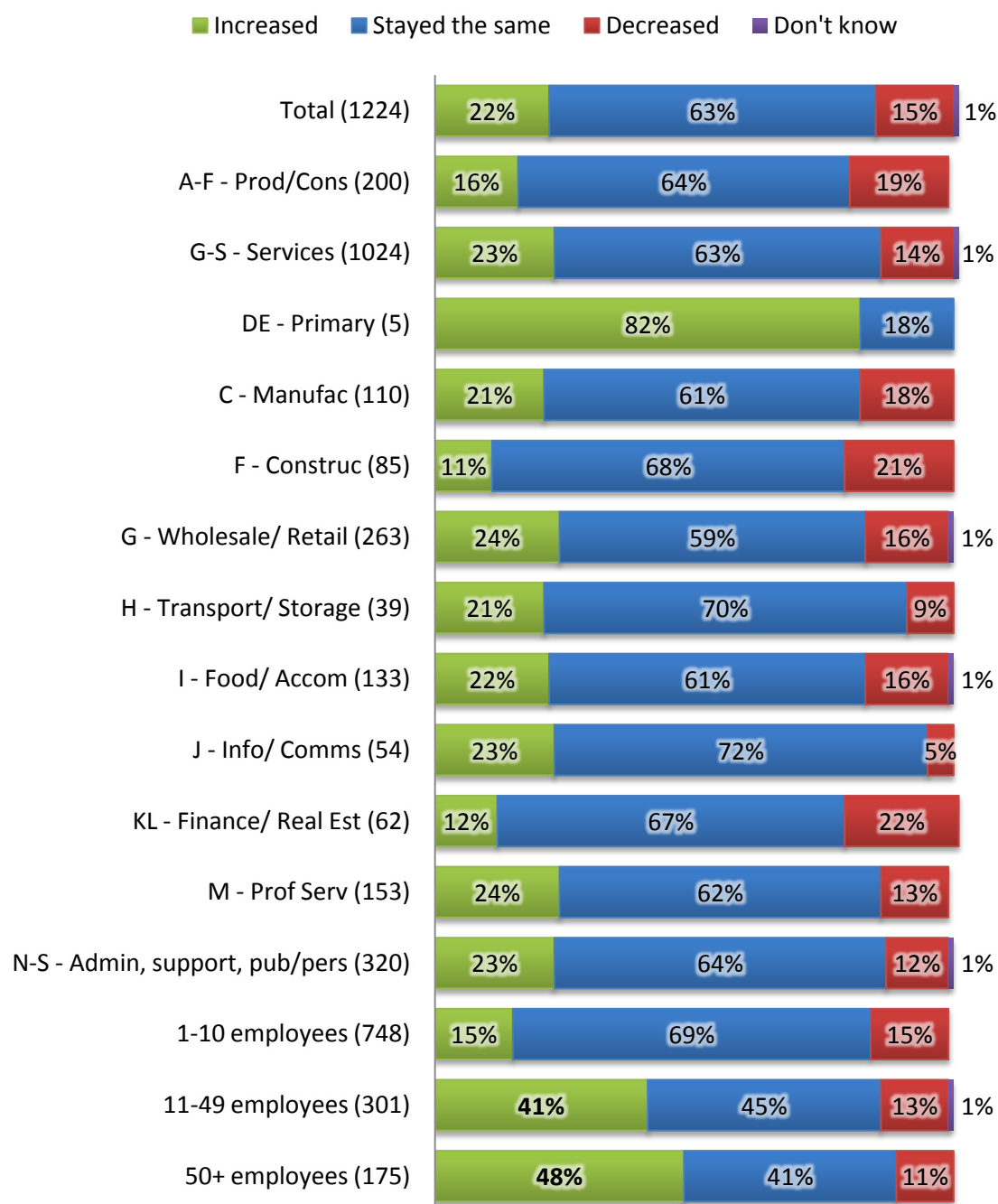
More than one in five employers in Greater Manchester (22%) reported an increase in the number of staff employed at their site in the last 12 months. This proportion is higher than in 2012 (17%). The proportion reporting a decrease is similar to a year ago (15% each year).

The greatest likelihood of an increase in employment is to be found within the wholesale/retail trade (24%) and professional services (24%), while more than four in ten employers - with more than 10 employees - reported an increase.

Statistics from the June/July 2013 Business Barometer suggest that Greater Manchester employers have experienced a more positive trend in employment than the UK average. The Barometer reported that 12% of UK SMEs had experienced an increase in employment in the last 12 months, with 21% having experienced a decrease.

The proportion of SMEs reporting 'no change' in employment was higher than had been observed during the preceding 5 years, suggesting greater stability in employment within Greater Manchester during 2013.

Figure 2: Change in employment in the last 12 months, by industry sector and size (all respondents)

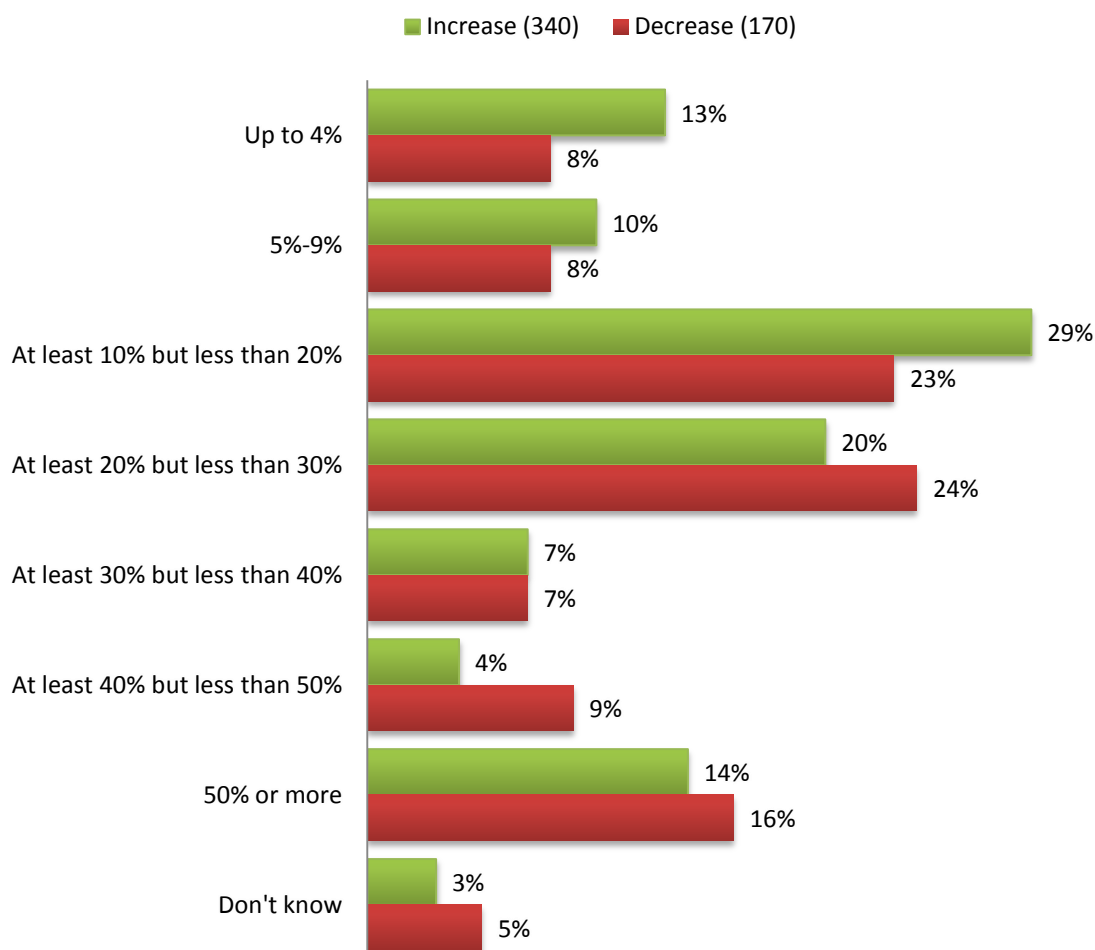


Q11, unweighted bases in parentheses

Figures in bold are significantly higher than average

On average, employers reported a 26% increase in the number of staff employed, while the average decrease was 30%. However, nearly a quarter of employers reporting a decrease also reported that their workforce has at least halved in the last 12 months.

Figure 3: Percentage increase/decrease in staff numbers (where experienced increase/decrease in staff numbers)



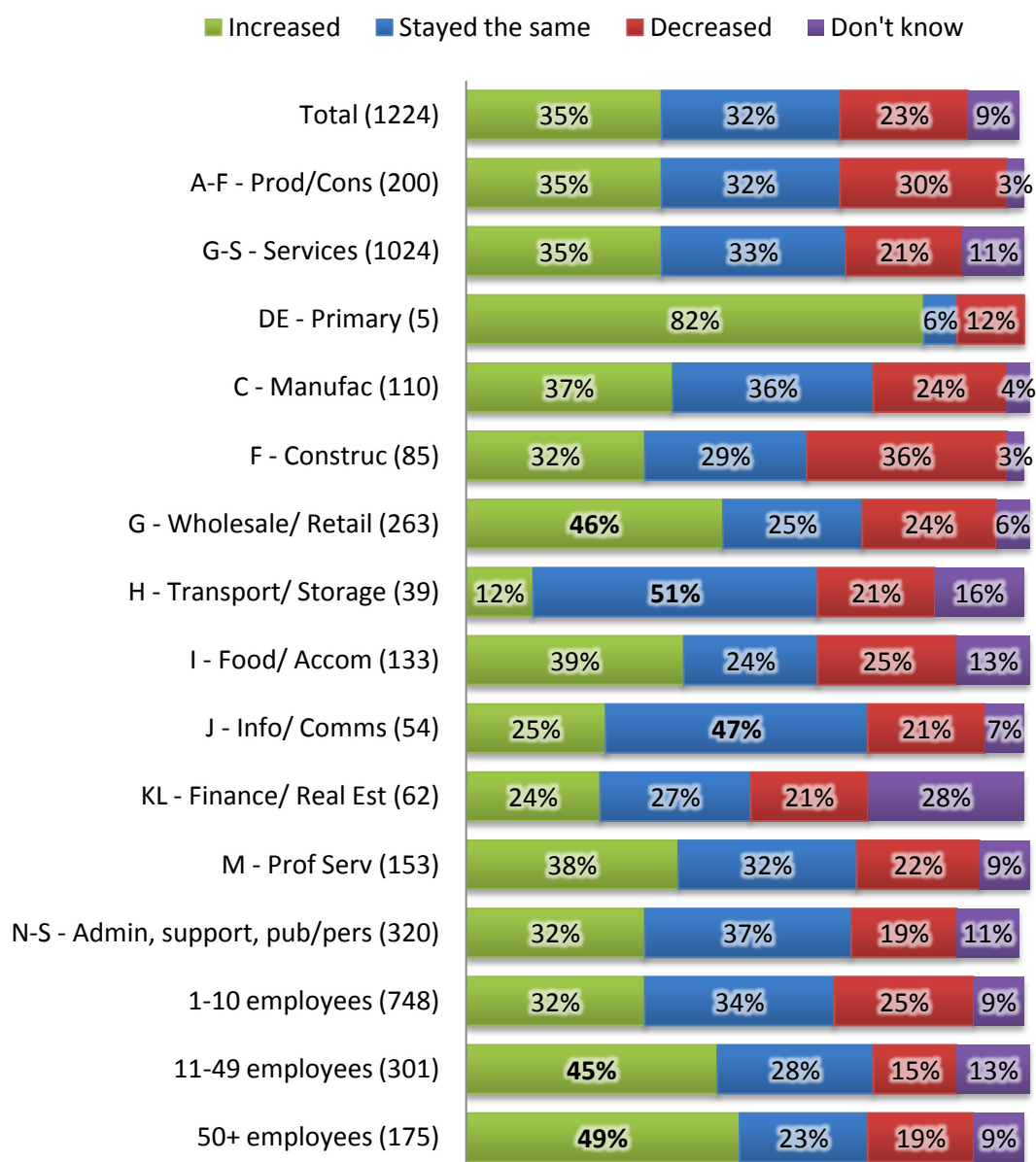
Q12, unweighted bases in parentheses

3.1.2 Change in turnover in the last 12 months

More than a third of employers in Greater Manchester (35%) reported an increase in turnover in the last 12 months. This compares with the same figure in 2012. The proportion that reported a decrease in turnover is slightly lower than a year ago (23%, compared with 26%). For a third, the level of turnover has remained unchanged (32%, compared with 34% in 2012).

Echoing comparisons on employment change, statistics from the June/July 2013 Business Barometer suggest that Greater Manchester employers have experienced a more positive trend in turnover than the UK average. The Barometer reported that 24% of UK SMEs had experienced an increase in turnover in the last 12 months, with 34% having experienced a decrease.

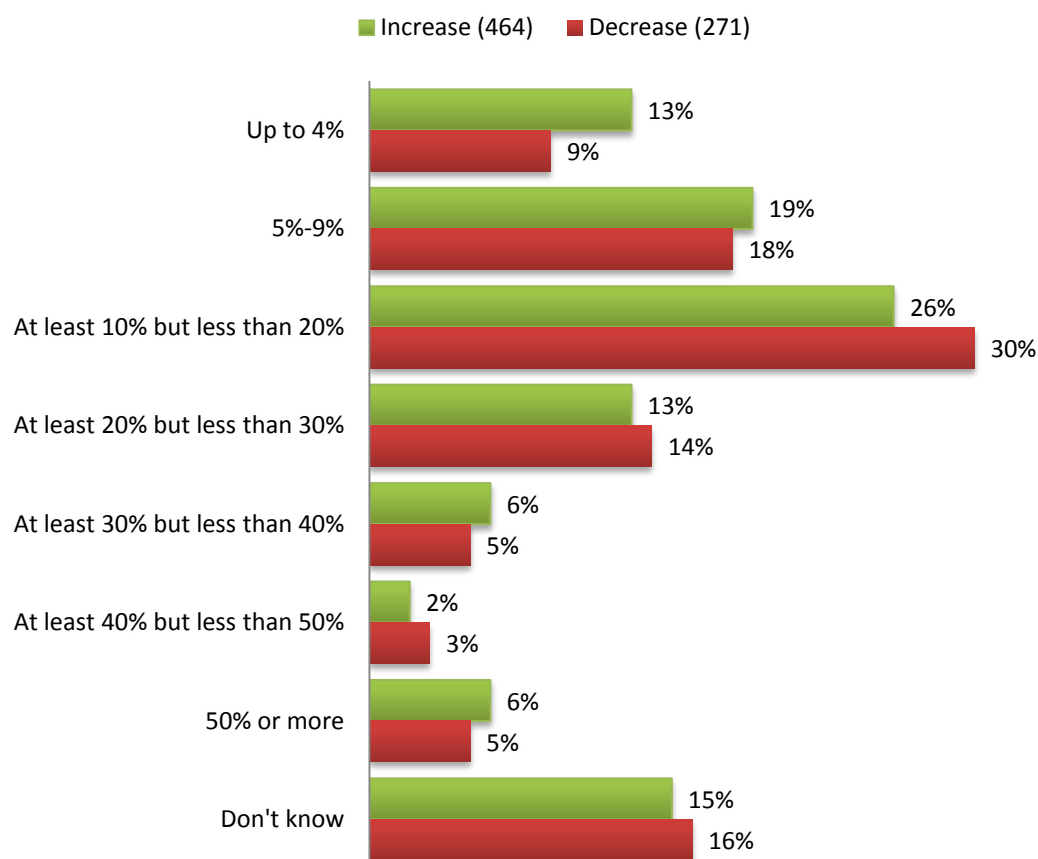
Figure 4: Change in turnover in the last 12 months, by industry sector and size (all respondents)



Q16, unweighted bases in parentheses *Figures in bold are significantly higher than average*

On average, employers reported an increase of 19% in turnover, while those reporting a decrease reported a similar average decrease (20%). More than half of employers reporting increases or decreases in turnover reported the change to be less than 20% (58% and 57% respectively). Around one in seven employers in both groups did not know the size of the increase or decrease.

Figure 5: Percentage increase/decrease in turnover (where experienced increase/decrease in turnover)



Q17, unweighted bases in parentheses

3.2 Anticipated change in employment and turnover in the next 12 months

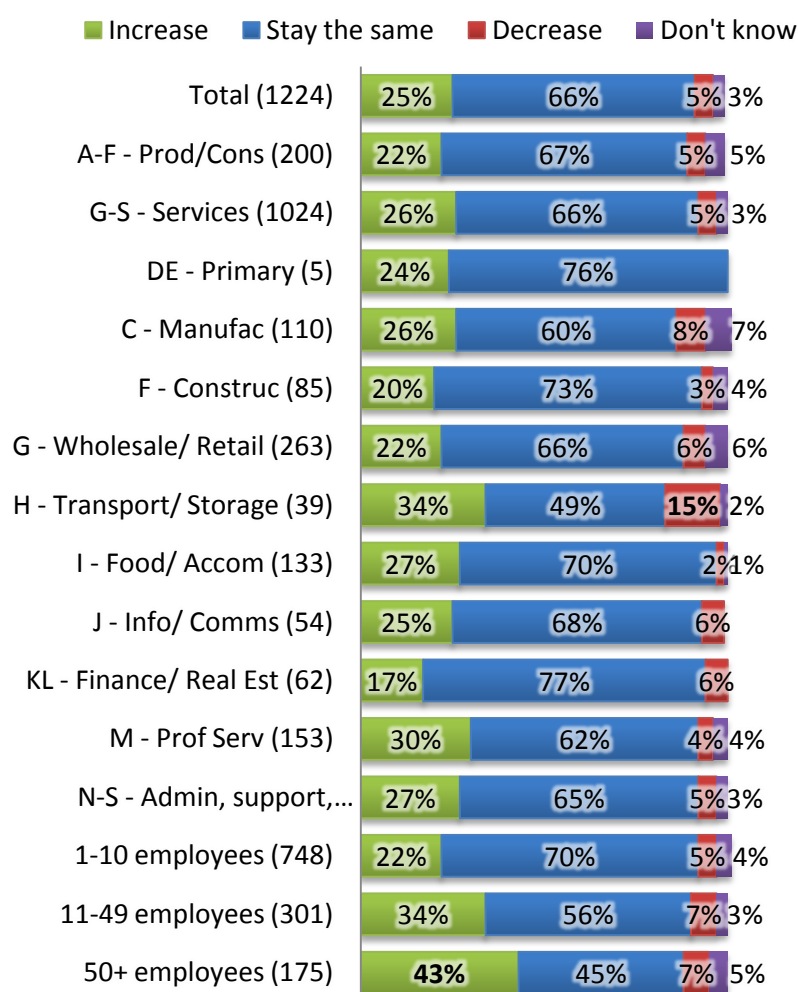
3.2.1 Anticipated change in employment in the next 12 months

A quarter of employers (25%) anticipate an increase in the number of staff employed at their site in the next 12 months, while just 5% anticipate a decrease. The majority therefore (66%) do not expect any change.

There is more optimism amongst Greater Manchester employers going forward than at the same time last year, when 21% were anticipating an increase in employment and 6% anticipating a decrease. Employers in transport/storage (34%) and professional services (30%) are amongst the most optimistic, forecasting an increase in employment.

The June/July 2013 Business Barometer reported a similar outlook for UK SMEs as is highlighted for Greater Manchester employers. Around a quarter (23%) of UK SMEs anticipated an increase in employment in the next 12 months; and similar to the results from Greater Manchester employers - just 7% anticipated a decrease.

Figure 6: Anticipated change in employment in the next 12 months, by industry sector and size (all respondents)

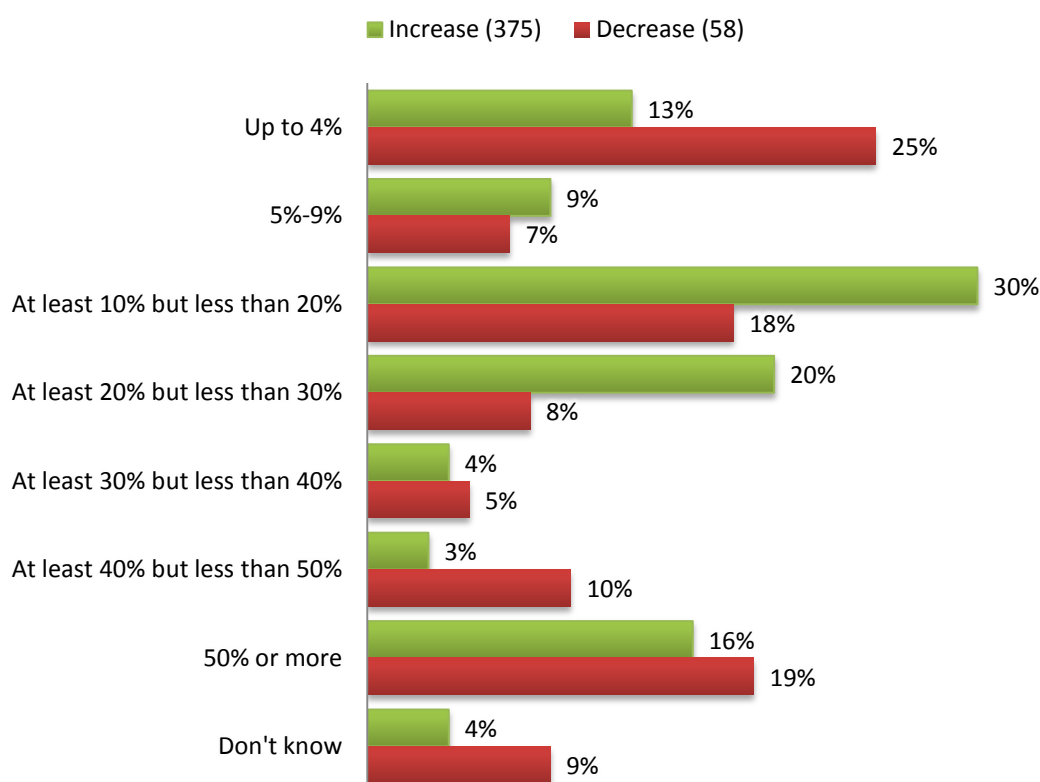


Q13, unweighted bases in parentheses

Figures in bold are significantly higher than average

On average, employers anticipating an increase in staff numbers said that they will grow their workforce by just over a quarter (27%) in the next 12 months. Those anticipating a decrease expect a reduction in their workforce of, on average, 29%. A third of the sample that anticipate a decrease said that they expect at least halving their workforce in the next 12 months.

Figure 7: Anticipated percentage increase/decrease in staff numbers (where anticipate increase/decrease in staff numbers)



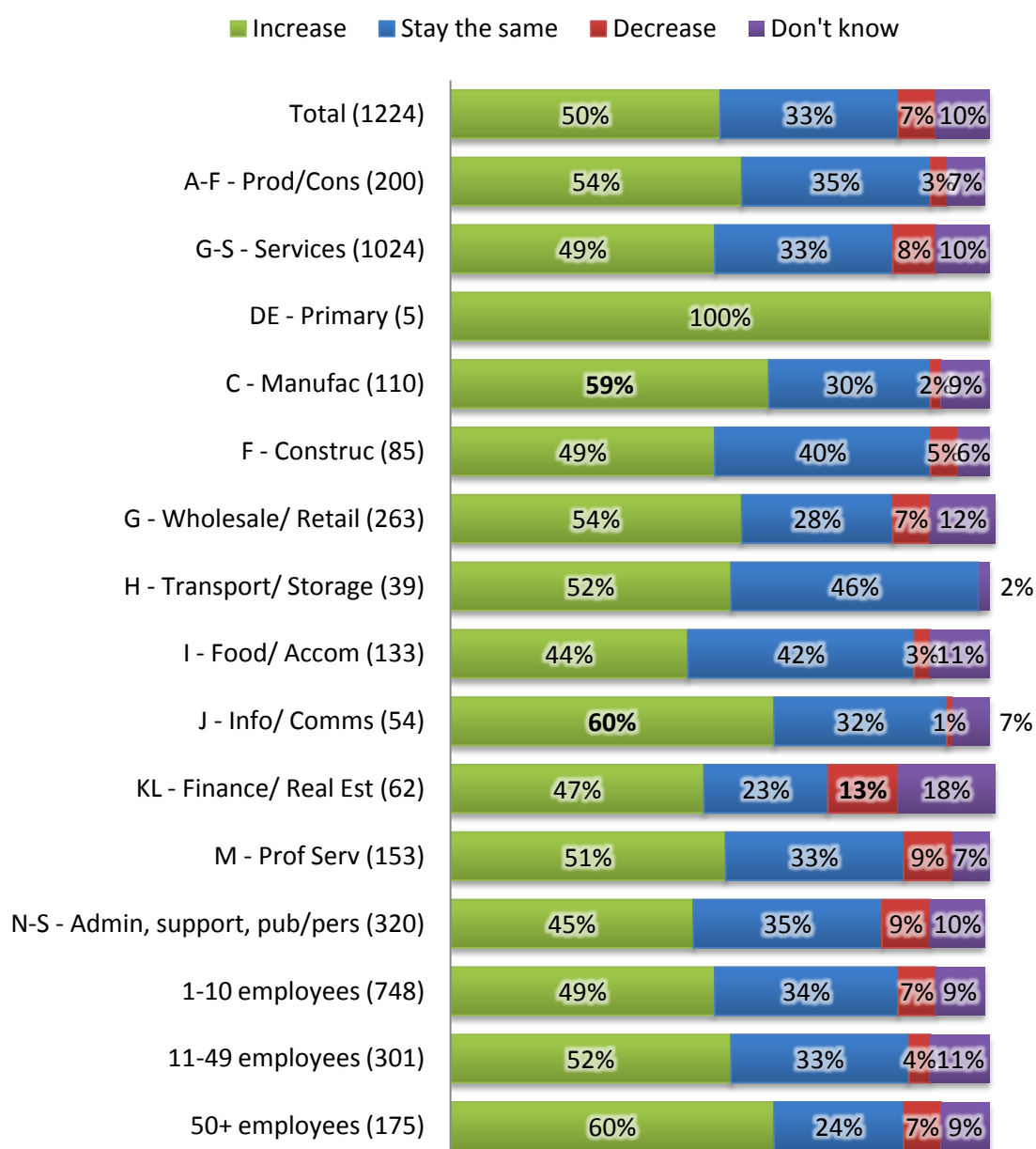
Q14, unweighted bases in parentheses

3.2.2 Anticipated change in turnover in the next 12 months

Half of all employers in Greater Manchester (50%) anticipate increasing their turnover in the next 12 months. This is a higher proportion than that reported in 2012 (43%). Just 7% anticipate a decrease (11% in 2012).

Employers in information/communications (60%), manufacturing (59%) and the wholesale/retail trade (54%) are more likely than average to anticipate an increase in their turnover in the next 12 months.

While UK SMEs, as suggested by the June/July 2013 Business Barometer findings, were very positive with regard to anticipated growth in turnover, they were not as positive as Greater Manchester employers, with 39% of UK SMEs anticipating turnover growth and 12% anticipating decline.

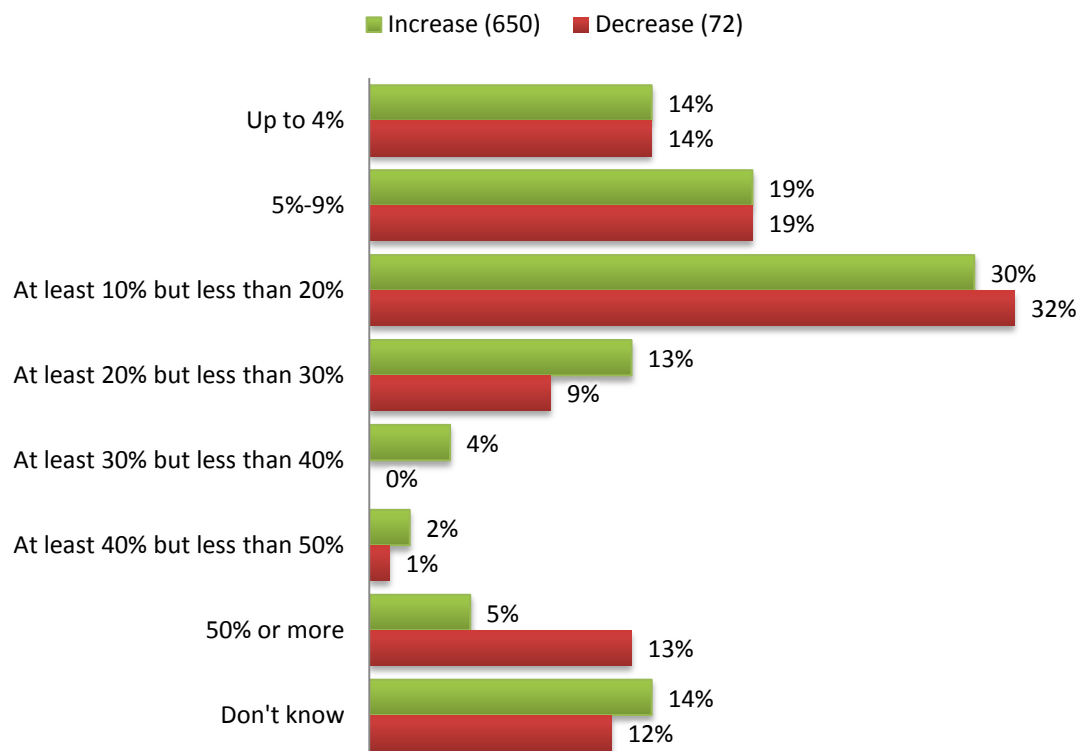
Figure 8: Anticipated change in turnover in the next 12 months (all respondents)

Q18, unweighted bases in parentheses

Figures in bold are significantly higher than average

The level of anticipated growth in turnover in the next 12 months is, on average, 18%, with the average level of anticipated decrease slightly higher at 22%. More than one in ten employers expecting change did not feel able to quantify the size of it.

Figure 9: Anticipated percentage increase/decrease in turnover (where expect increase/decrease in turnover)



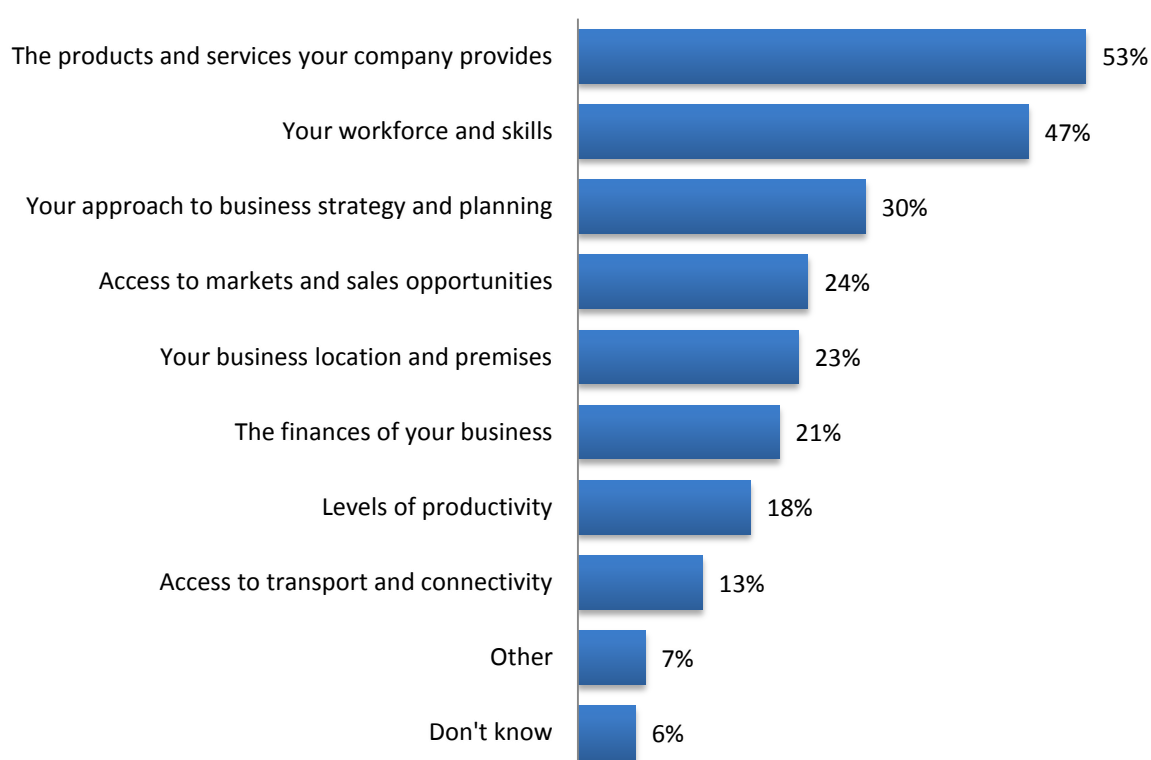
Q19, unweighted bases in parentheses

4 Growth issues

4.1 Drivers of, and barriers to, growth

Respondents were asked to select up to three main drivers of growth of their business from a list of potential factors. Most frequently selected was that of the products and services provided by the company (53%), with just under half of all employers citing workforce and skills (47%). These were the top two drivers of growth in 2012 (57% and 48% respectively). Approach to business strategy and planning was also stated by just under a third (30%) of businesses.

Figure 10: Main drivers of growth (all respondents)

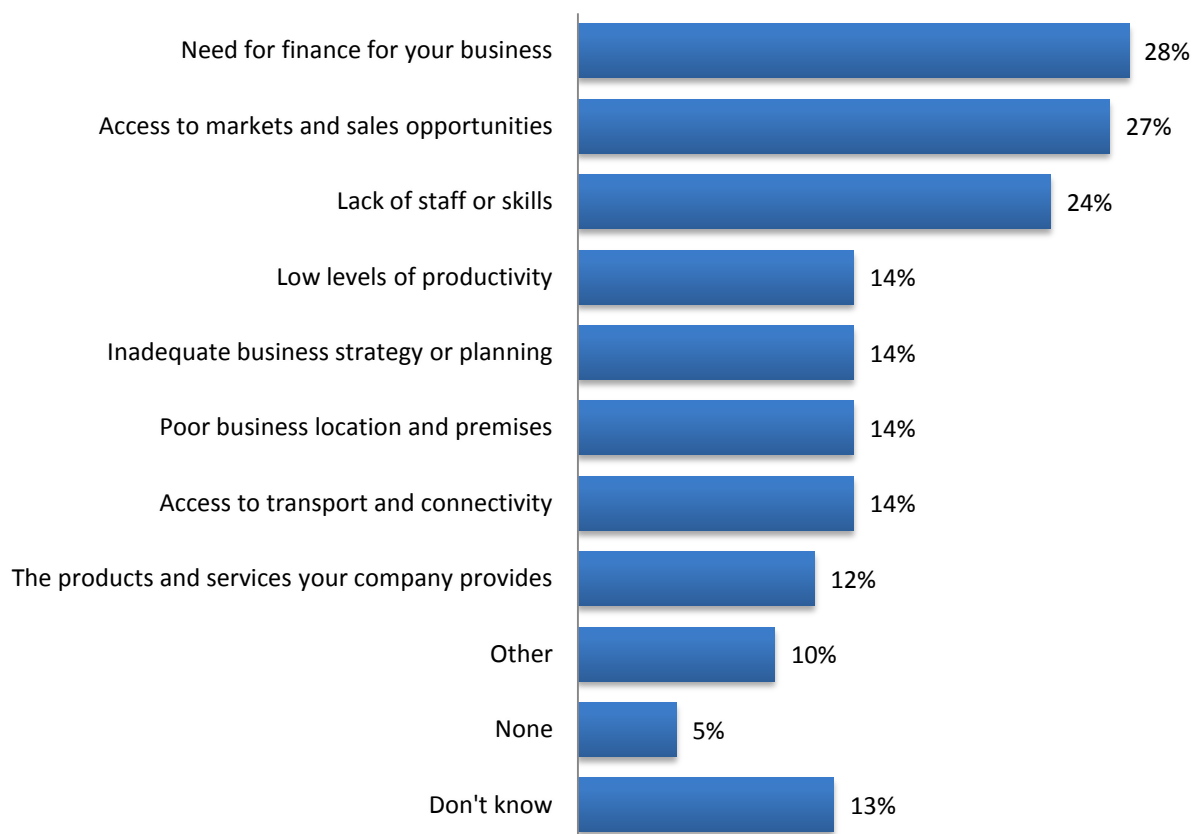


Q30, unweighted base = 1224

Respondents were then asked to select the three main barriers to growth from a list of possible impediments. They were most likely to select the need for finance for their business (28%), with over a quarter (27%) citing access to markets and sales opportunities, and just under a quarter (24%) state a lack of staff or skills.

Although prompted with a slightly different list compared with last year, business finance and access to markets were also significant barriers 12 months ago; 36% cited 'finance of the business and levels of productivity' as a barrier, and 30% cited 'access to markets and sales opportunities' in the 2012 survey.

Figure 11: Main barriers to growth (all respondents)



Q31, unweighted base = 1224

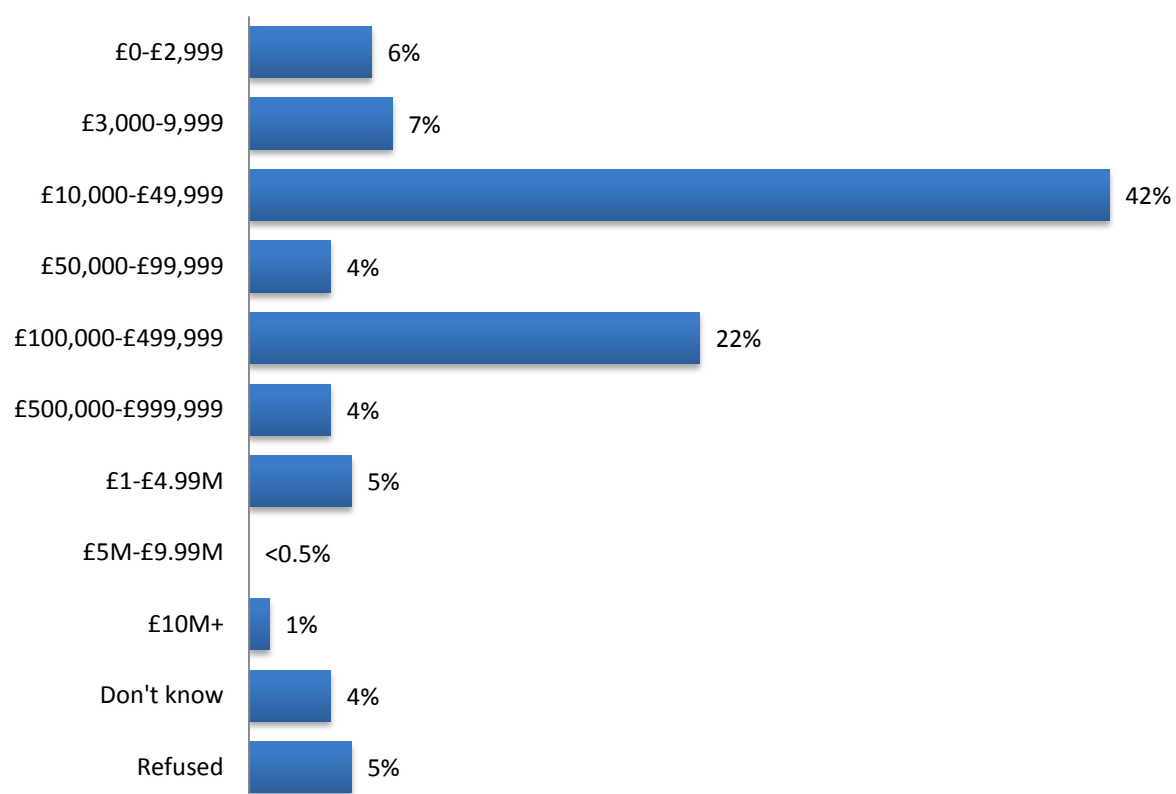
4.2 Financing growth

4.2.1 Finance sought

Around one in seven businesses (15%) had sought finance for their business in the last 12 months; which is slightly lower than that reported in 2012 (18%). The proportion of UK SMEs having sought finance, as reported by the June/July 2013 Business Barometer, was similar at 17%.

The proportion seeking finance is significantly higher than average amongst information/ communications businesses (25%), and administration/support/public and personal services businesses (20%).

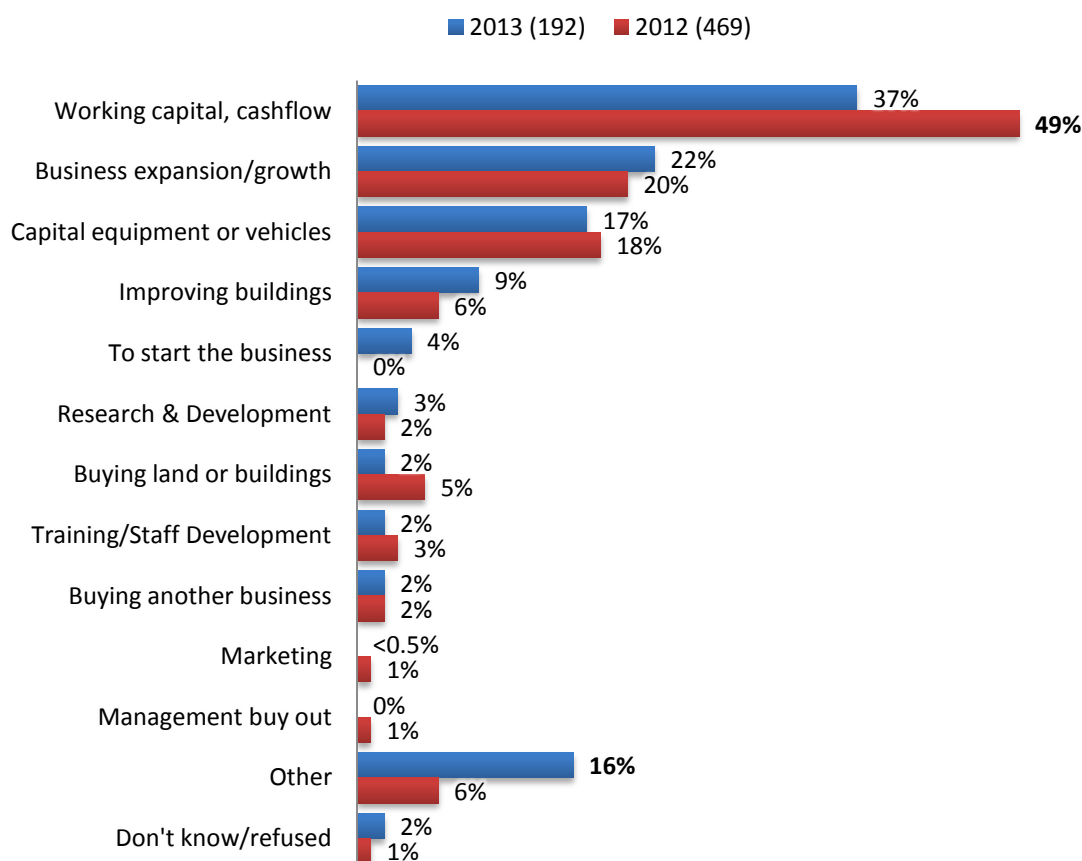
Greater Manchester businesses who had sought finance had most commonly required between £10,000 and £49,999 (42%), or £100,000 and £499,000 (22%). However, the mean amount sought was £392,000. This compares with a mean of £513,000 in 2012.

Figure 12: Amount of funding required (where sought finance)

Q33, unweighted base = 89

There has been little change in the main reasons for seeking finance since 2012. Finance was most commonly sought to use as working capital/cashflow (37%) and this is similar to the findings 12 months ago (49%). Just over one-in-five (22%) sought finance for business growth, and just under one-in-five (17%) for capital equipment or vehicles.

Figure 13: Purpose of finance – year on year comparison (where sought finance)



Q34, unweighted bases in parentheses

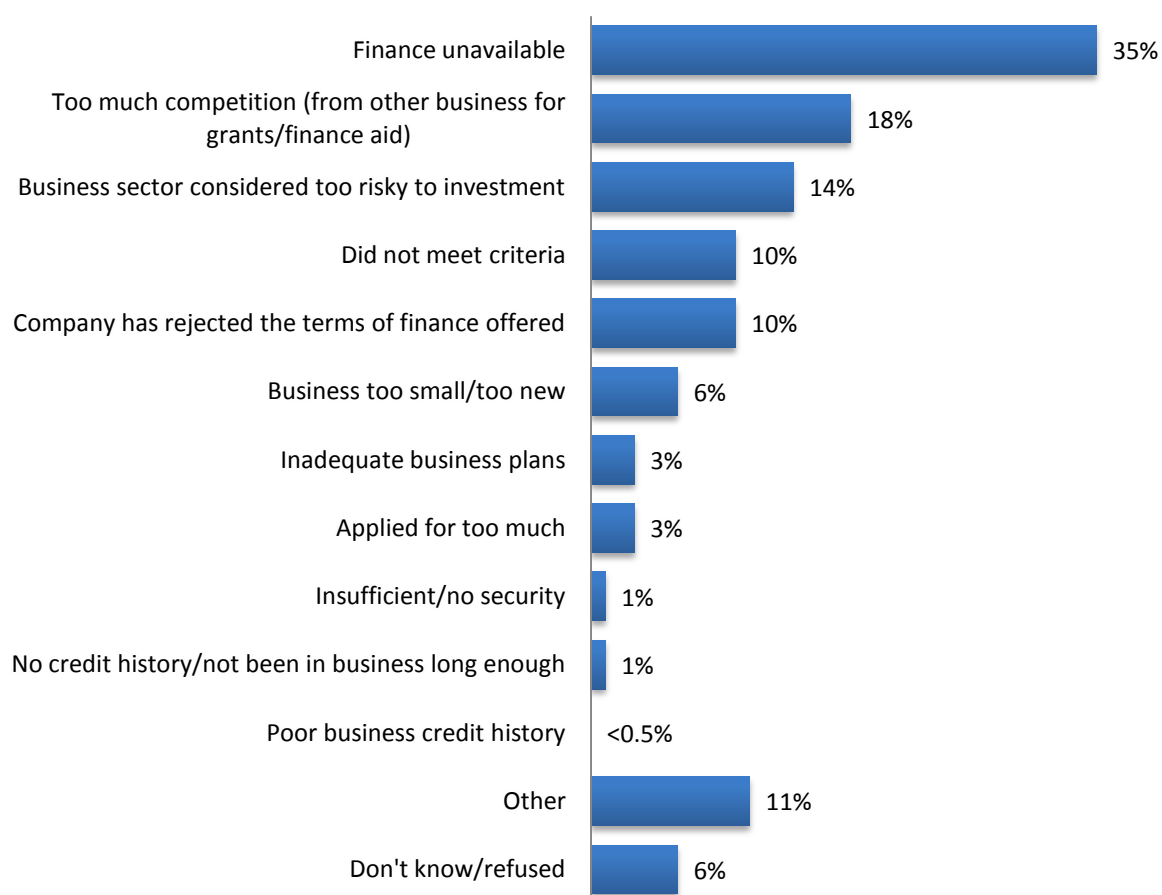
Figures in bold are significantly higher than comparison figure

4.2.2 Difficulties in arranging finance

Of those that sought finance, four in ten (40%) reported experiencing difficulties with arranging it. This proportion is lower than in 2012 (49%). However, it compares favourably with the difficulties reported by half (50%) of UK SMEs that had sought finance, as reported in the June/July 2013 Business Barometer.

In terms of the difficulties experienced, the most significant challenge reported is that finance was unavailable (35%), while just under one in five (18%) feel there is too much competition, and one in seven (14%) that their sector is considered too risky.

Figure 14: Difficulties in arranging finance – unprompted, multiple response (where experienced difficulties in arranging finance)



Q36, unweighted base = 76

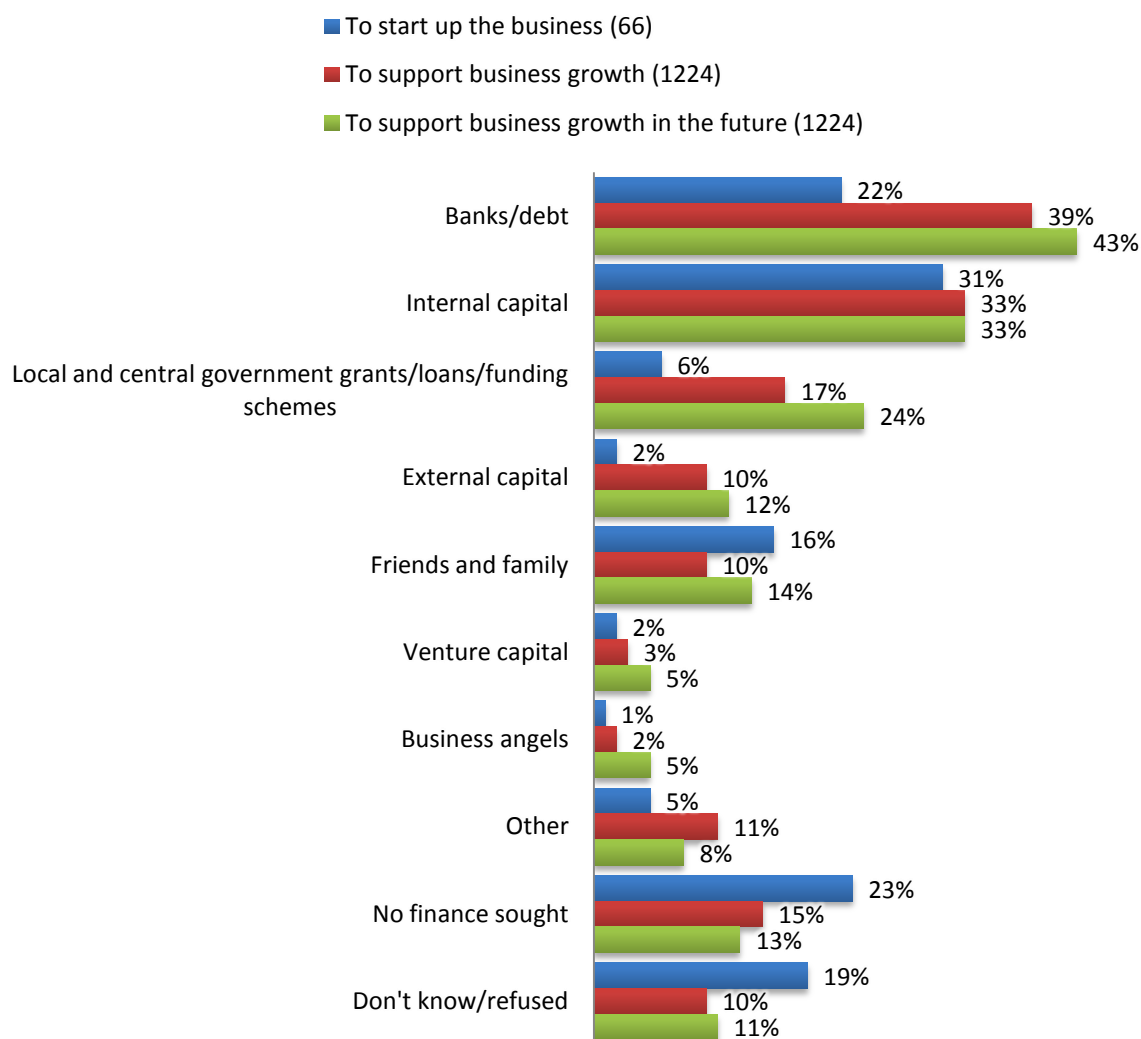
4.2.3 Methods of accessing finance to support business growth

Respondents reported that their business is likely to access finance in a number of ways, the most common being through banks/debt, but internal capital is almost as important.

When starting up a business, internal capital (31%) and banks/debt (22%) are the main two sources of finance for respondents. Sources of finance to support current business growth, or to support growth in the future are similar, with again, banks/debt (39% and 43% respectively) and internal capital (33% for both reasons) being the main ones mentioned by businesses.

Few businesses said that they had used venture capital (2% to start up, 3% to support current growth and 5% to support future growth) and few businesses said that they had used business angels (1%, 2% and 5%) to support any stage of growth.

Figure 15: Methods of accessing finance to support business growth, by reason for accessing finance (all respondents)



Q37-Q39, unweighted bases in parentheses

5 Local area and community

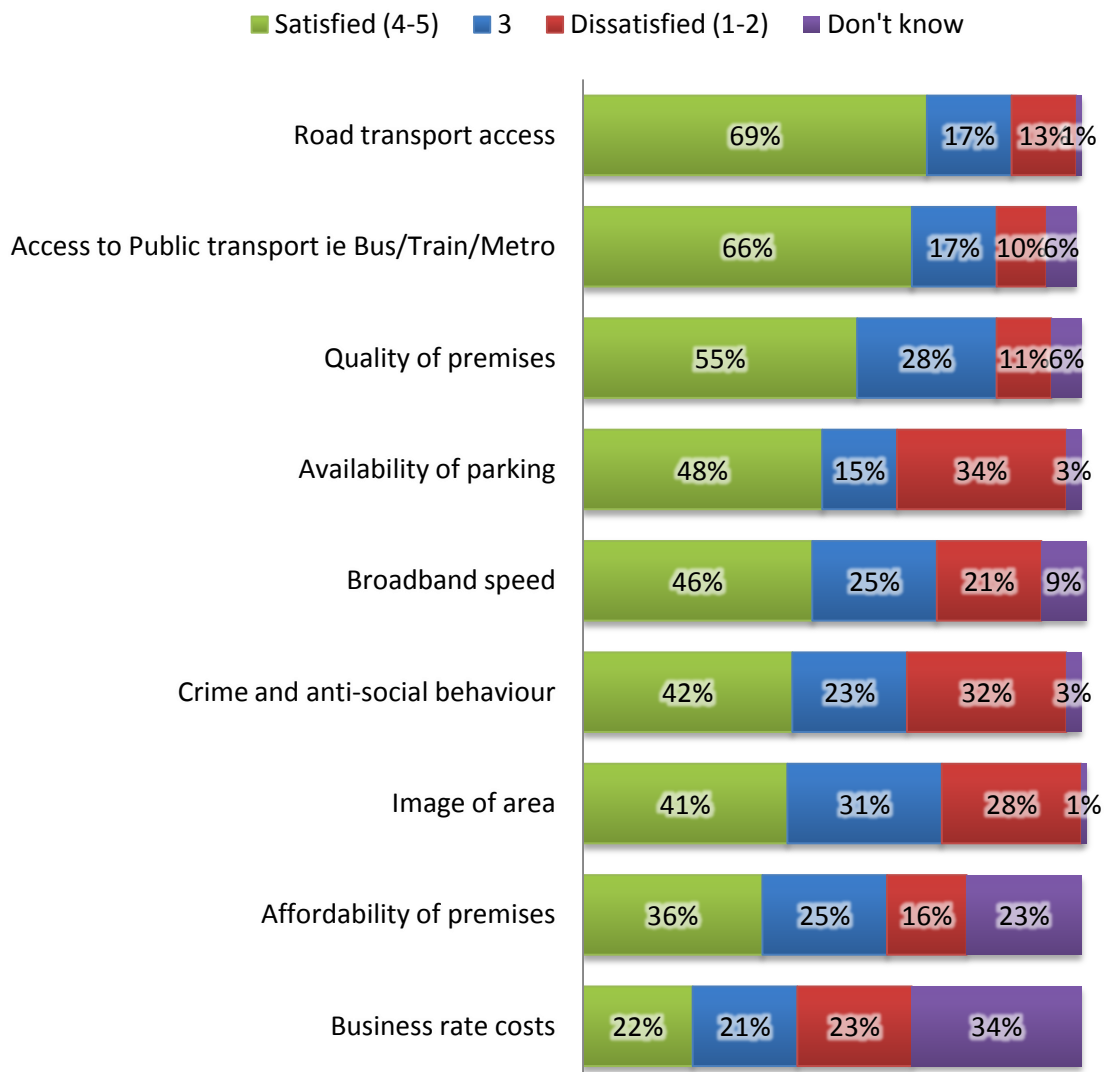
5.1 Satisfaction with local area

Businesses were asked to rate their level of satisfaction with aspects of their local area. They gave a rating of between 1 and 5, where 1 is very dissatisfied and 5 is very satisfied. The graph below shows a summary of those who are satisfied (scoring 4 or 5), neither satisfied nor dissatisfied (scoring 3) or dissatisfied (scoring 1 or 2).

Aspects of the local area rated most positively (scoring 4 to 5) include:

- Road transport access (69%; 57% in 2012)
- Access to public transport (66%; 55% in 2012)
- Quality of premises (55%; not asked in 2012).

Figure 16: Satisfaction with local area (all respondents)



Q20, unweighted base = 1224

Aspects rated least positively (scoring 1 to 2) include:

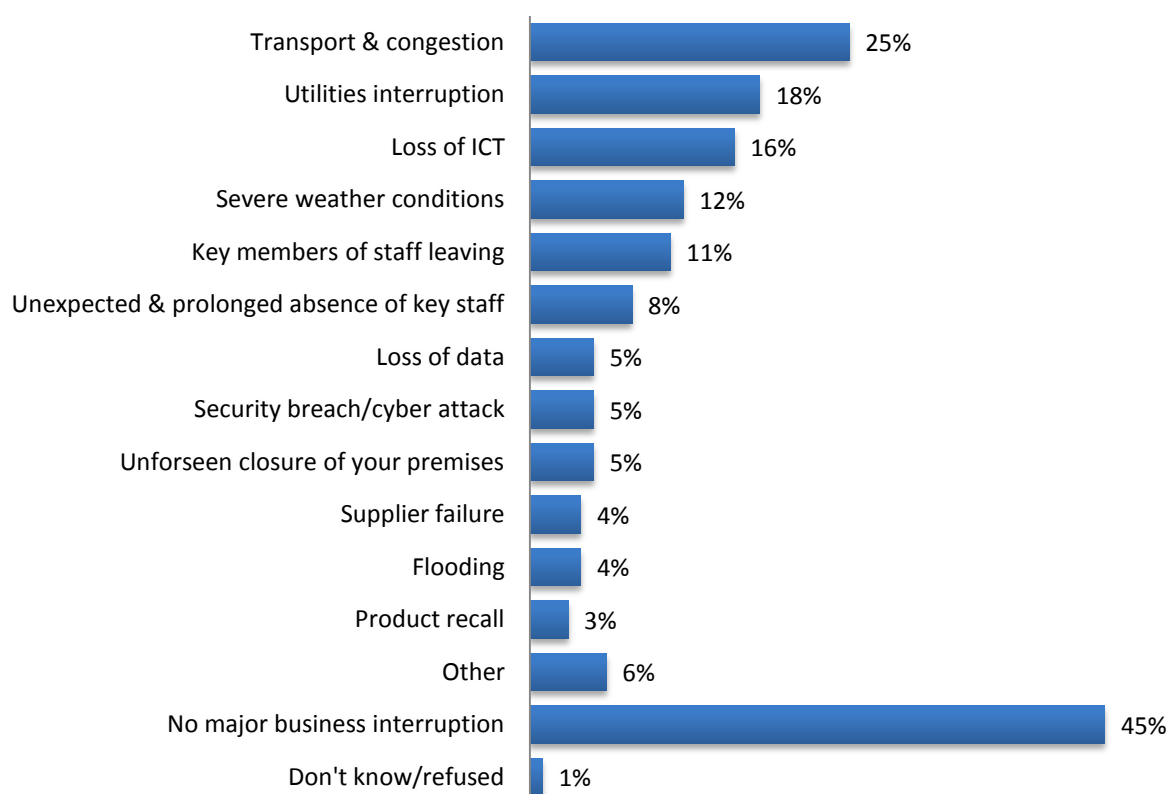
- Availability of parking (34%; 31% in 2012)
- Crime and anti-social behaviour (32%; 29% in 2012)
- Image of area (28%; 26% in 2012)
- Business rate costs (23%; 34% in 2012)
- Broadband speed (21%; not asked in 2012).

Respondents were asked if their business has experienced any major business disruptions in the last 12 months caused by one or more of a range of issues listed.

More than half the respondents (54%) cited at least one cause of disruption, and this is most likely to have been transport and congestion (25%). Utilities interruption was cited by almost one in five (18%), while slightly fewer cited loss of IT (16%).

Transport/storage businesses are more likely than average to have experienced disruptions of various types including transport & congestion (43%), severe weather conditions (39%), unexpected prolonged absence of key staff (25%) and key members of staff leaving (23%). Information/communications businesses are also more likely to have experienced disruptions, particularly transport & congestion (41%).

Figure 17: Business disruption experienced – prompted, multiple response (all respondents)



Q24, unweighted base = 1224

The majority of businesses (61%) have plans in place to ensure that key business functions continue despite serious disruptions (i.e. a Business Continuity Plan). In more than half of these cases (36% of all firms with plans) these plans have been tested. In the remainder (25%) they have not been tested in the last year.

Almost a third of businesses (31%) have no such plans in place, with a further 3% never having considered this type of planning before; and 6% of employers not knowing whether such plans exist in their organisation.

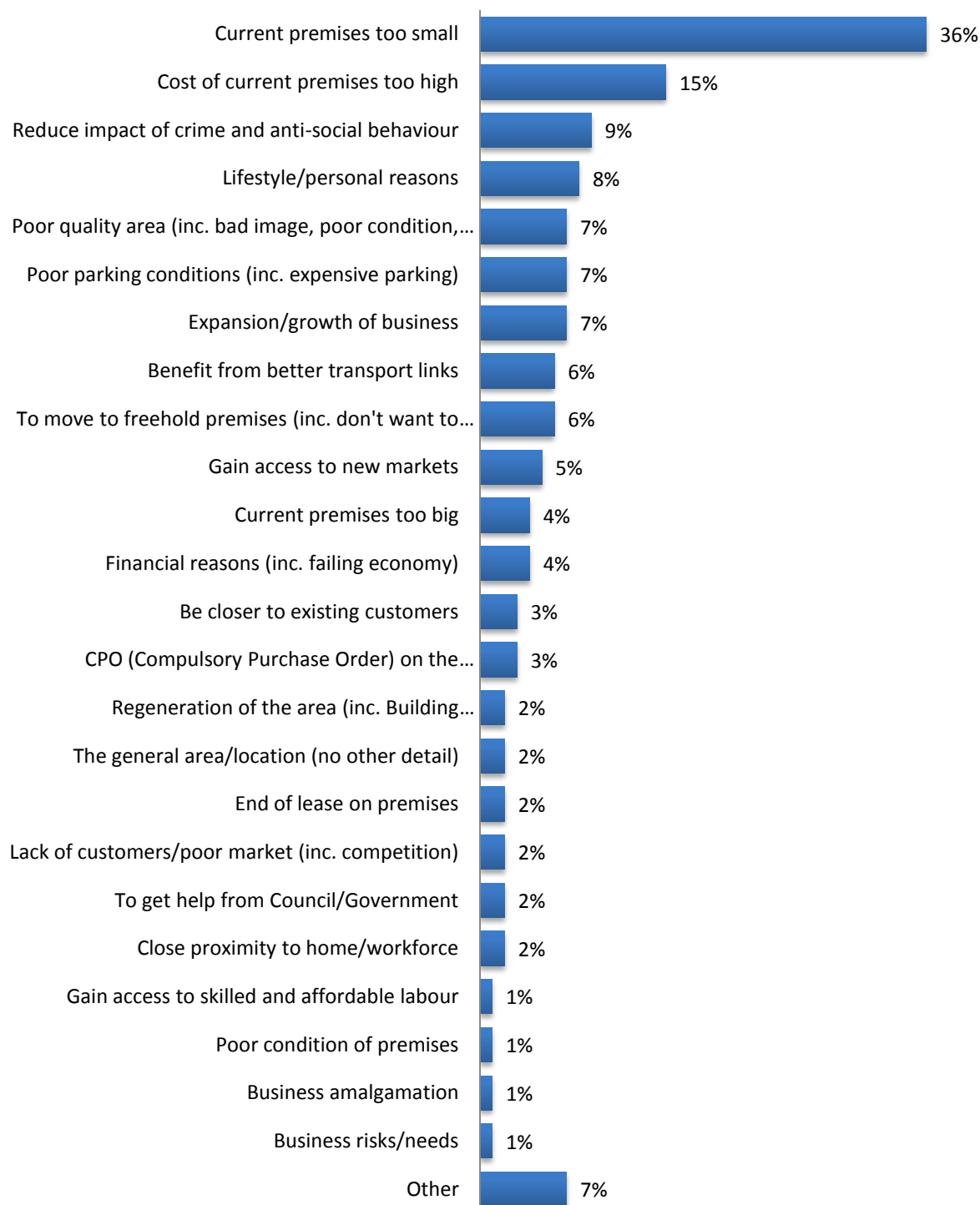
The propensity to have a Business Continuity Plan in place increases with business size, ranging from 54% of businesses with between 1 and 10 employees - to 78% of businesses with between 11 and 49 employees - and to 94% of all businesses with 50 or more employees.

5.2 Potential relocation

About one in ten businesses (11%) are currently considering relocation. This proportion is slightly lower than in 2012 (15%).

The main reason for considering relocation is the size of premises, specifically, that they are too small (36%), although 4% of those considering relocation feel their current premises are too big. About one in seven (15%) cite the cost of their current premises as the reason for considering relocation.

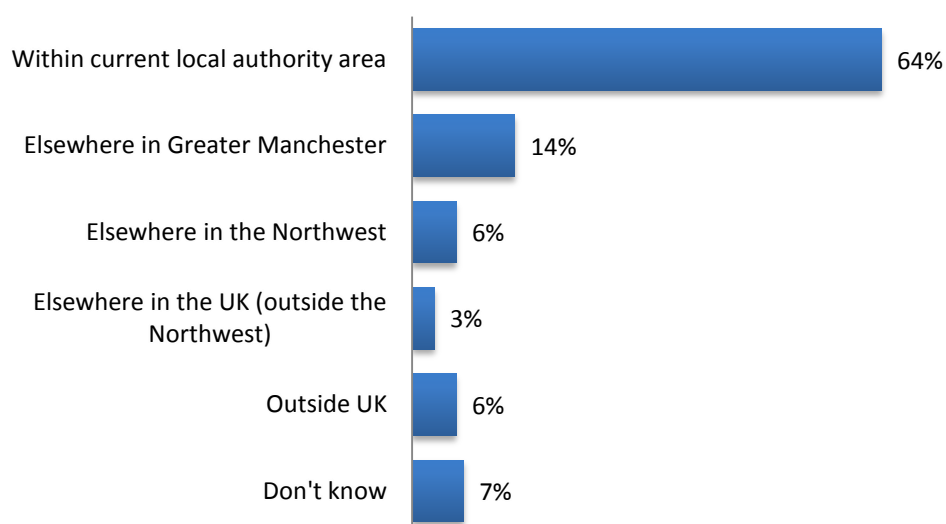
Figure 18: Reasons for considering relocation – unprompted, multiple response (where considering relocation)



Q27, unweighted base = 139

The majority of businesses seeking to relocate intend to remain within their current local authority area (64%). Of the remainder, the majority intend to remain within the Greater Manchester area (14% of all considering relocation), while about one in seven are looking to move somewhere outside the Greater Manchester area.

Figure 19: Possible relocation sites (where considering relocation)



Q28, unweighted base = 139

5.3 Support for the local economy and community

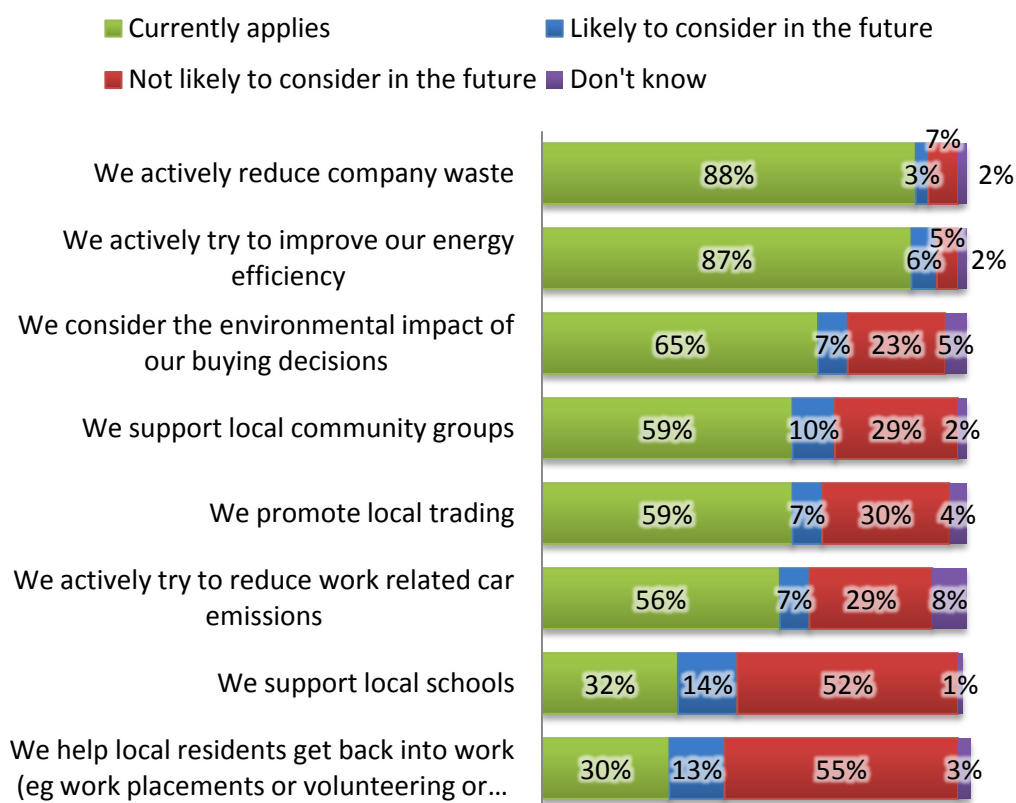
Businesses were asked how they support their local economy and community.

They indicated similar levels of support in various areas to last year. Almost nine-in-ten respondents reported that their business currently actively reduces company waste (88%; 84% in 2012) and actively tries to improve their energy efficiency (87%; 81% in 2012).

Almost two thirds of businesses currently consider the environmental impact of their buying decisions (65%; 63% in 2012). About a third support local schools (32%, compared with a similar level - 33% in 2012).

However, compared with 2012, they are significantly more likely to support local community groups (59%, compared with 37%) and slightly more likely to promote local trading (59%, compared with 55%), or help local residents get back into work (30%, compared with 24%). Businesses are less likely than they were in 2012 to actively try to reduce work related car emissions (56%, compared with 60% in 2012).

Figure 20: Support for the local economy and community (all respondents)



Q29, unweighted base = 1224

By sector:

- Administration/support/public and personal service and food/accommodation businesses are significantly more likely than average to currently support local schools (both 43%).
- Administration/support/public and personal service and information/communications businesses are significantly more likely than average to currently support helping local residents get back into work (44% and 39% respectively).
- Food/accommodation businesses are significantly more likely than average to currently support local community groups (82%), and to actively try to improve their energy efficiency (95%).
- Wholesale/retail businesses are significantly more likely than average to actively reduce company waste (93%).

By size, the propensity to support the local economy and community is greater within larger employers. Businesses with 50 or more staff are significantly more likely than smaller employers to be currently active in:

- Trying to improve their energy efficiency (98%);
- reducing company waste (96%);
- considering the environmental impact of their buying decisions (81%);
- actively trying to reduce work related car emissions (77%); and
- supporting local schools (51%).

6 Business support

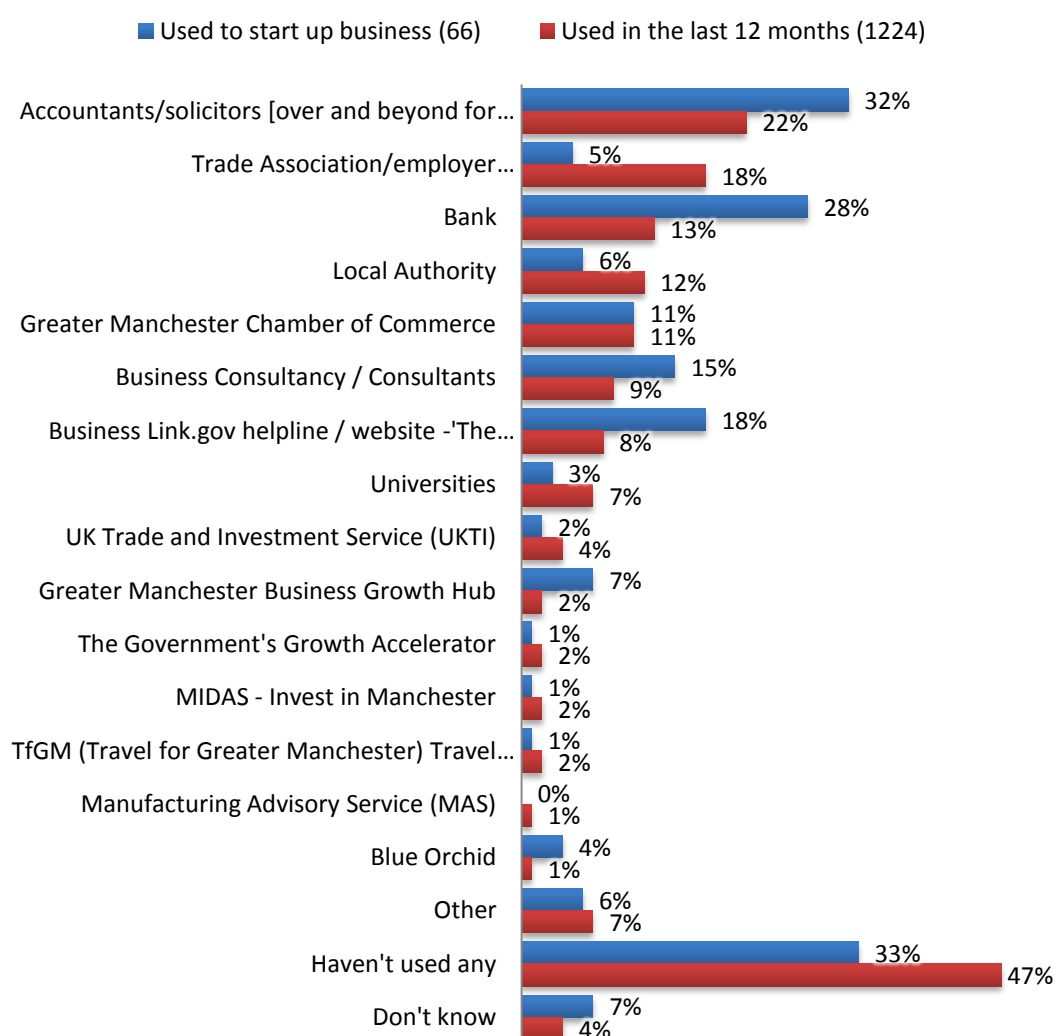
6.1 Use of business support and advice

6.1.1 Use of business support and advice in the last 12 months

Just under half of businesses in Greater Manchester said that they have used at least one form of professional support and advice organisation in the last 12 months. Just over a fifth had used accountants/solicitors (22%), while more than one in ten had used trade associations/employer organisations/business networks (18%), banks (13%), Local Authorities (12%), and the GM Chamber of Commerce (11%).

Those starting up their business had used similar organisations, but with higher proportions using each, particularly accountants/solicitors (32%) and banks (28%). A sizeable proportion of this group had also used the Business Link.gov helpline (18%) for business start-up.

Figure 21: Use of business support and advice to start up the business (where trading up to 3 years) and in the last 12 months (all respondents)



Q40/Q41, unweighted bases in parentheses

Respondents reported that their businesses had sought support and advice in a range of areas in the last 12 months. From a prompted list, they were most likely to mention workforce skills & training (34%), business networking (29%), general business growth support services (28%), increasing sales through marketing (27%); and using broadband/digital technology (26%).

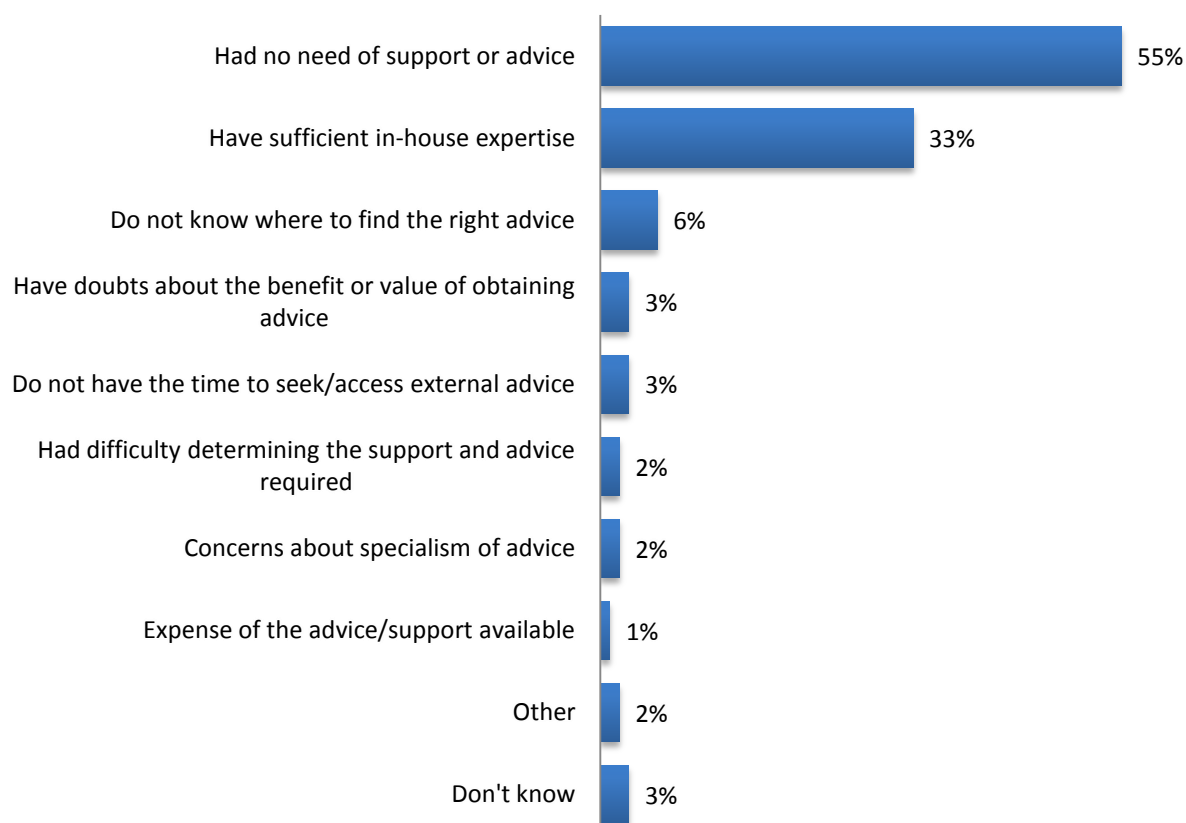
In terms of future use, the range of support and advice was similar to that already used in the past 12 months, with increasing sales through marketing (30%) and workforce skills & training (28%) again being the most popular choices. A sizeable proportion also mentioned support for helping to expand their workforce/recruitment (26%).

Figure 22: Areas in which businesses have sought support or advice in the last 12 months and where they are likely to seek support or advice in the foreseeable future – prompted, multiple response (where have used in last 12 months/all respondents)

	Used in last 12 months	Use in foreseeable future
Workforce skills and training	34%	28%
Business networking	29%	26%
General business growth	28%	25%
Increasing sales through marketing	27%	30%
Using broadband or digital technology	26%	22%
Expanding the workforce, recruitment/job creation, including recruitment of apprenticeships	23%	26%
Accessing finance, including grants & subsidies	21%	22%
Reducing energy, material, water & waste costs	21%	22%
Leadership and management skills to grow your business	20%	21%
Exploiting digital services and E-Commerce	19%	18%
Public sector contract opportunities	19%	21%
Business continuity (minimising disruption to your business)	18%	18%
Exporting/overseas trade	12%	9%
Availability of new premises or expanding your own premises	11%	15%
Help with innovation or research & development	11%	13%
Supply chains	11%	15%
Corporate Social Responsibility - finding out how you can support local schools	10%	11%
Sustainable travel, e.g. support for work-travel planning	6%	8%
Other	10%	4%
None	18%	30%
Don't know	1%	5%
Q51-Q52, unweighted Bases	626	1224

Businesses are now more aware of the need for support or advice and/or the lack of sufficient in-house expertise than in 2012. The most frequently cited reason for not using business support or advice was that there has been no need (55%; 72% in 2012), followed by having sufficient in-house expertise (33%; 12% in 2012).

Figure 23: Reasons for not using business support or advice (where have not used in last 12 months)



Q50, unweighted base = 547

The majority of those using professional support and advice paid nothing for it, or were unable to provide an estimate of what they paid, (46% paid nothing; 27% were not sure). Based on those providing a cost; the average spend was estimated as £14,000 per annum.

6.1.2 Difficulties in seeking business support and advice

Only 6% of all those that have used support or advice in the last 12 months expressed that they have had difficulties obtaining it. This is a lower proportion than in 2012 (10%). Difficulties experienced are most likely to revolve around finding out where to obtain the right support/advice (60%), or finding the time to seek out support (46%).

Around a third of those experiencing difficulties in seeking support and advice had difficulty determining the support and advice required (37%), while just over a quarter (28%) considered the advice/support available to be too expensive.

6.2 Business mentoring

One-in-ten employers (10%) has used a business mentor in the last 12 months. This is a similar proportion to that reported in 2012 (9%), and compares with similar levels (12%) reported amongst UK SMEs in the June/July 2013 Business Barometer.

The proportion of businesses using a business mentor is highest in finance/real estate (15%) and lowest in manufacturing and transport/storage sectors (both 3%).

Business mentors are most likely to help businesses in terms of developing plans and strategy (29%). This was also the most frequently mentioned benefit in 2012. Businesses also highlighted that their mentors had helped increase sales and profits (15%), and with improving their businesses position within the market place (12%).

Figure 24: How business mentoring has helped – unprompted, multiple response (where used a business mentor in the last 12 months)



Q58, unweighted base = 124

Despite the reported benefits of mentoring, only a small proportion (4%) of respondents are currently acting as a mentor. Even fewer (2%) said they were considering becoming a mentor for another business. A minority of respondents are currently acting as (4%) or considering becoming (2%) a business mentor for another business or entrepreneur. These figures are lower than the national average reported in the June/July 2013 UK Business Barometer where one-in-ten (11%) respondents within UK SMEs stated that they were already a mentor, and 7% were considering becoming a mentor in 2014.

7 Export, trade and connectivity

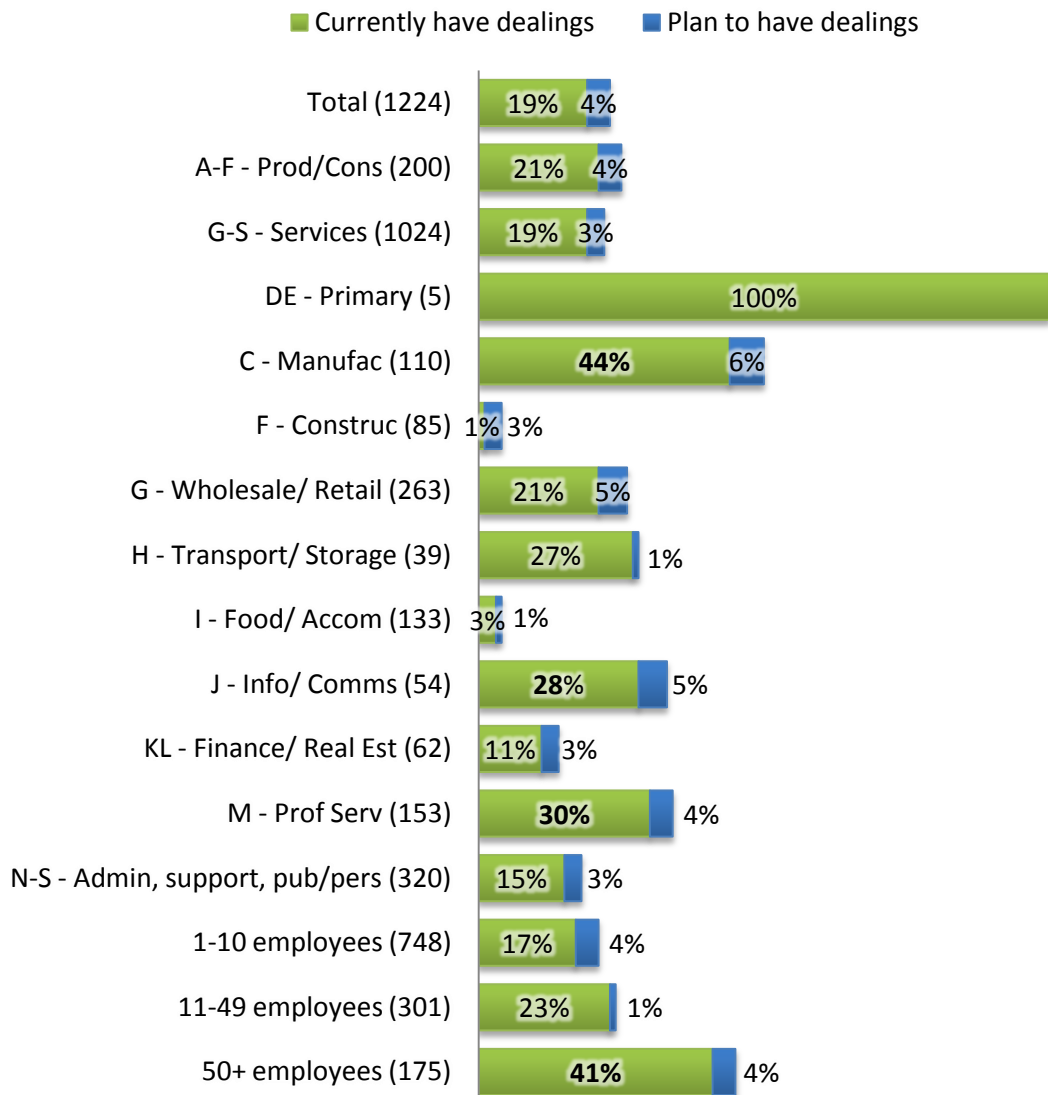
7.1 Relationships with international markets

One-in-five employers (19%) has dealings with international markets. This proportion is similar to that reported in 2012 (20%).

The proportion of UK SMEs that export, as reported by the June/July 2013 Business Barometer was 21%.

Around one in twenty employers (4%) has plans to deal with international markets in the future. Again, this is a similar, albeit slightly lower, proportion to that reported in 2012 (6%).

Figure 25: Proportion of businesses that deal with international markets, by industry sector and size (all respondents)



Q60, unweighted bases in parentheses

Figures in bold are significantly higher than average

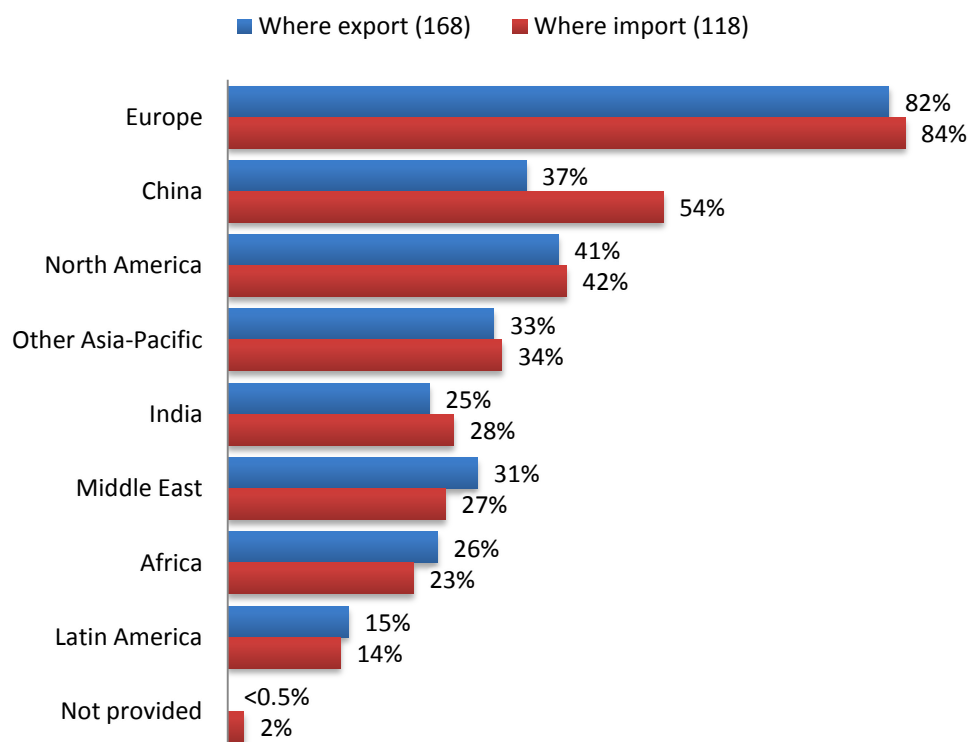
The proportion of Greater Manchester employers with international relationships is highest amongst:

- Manufacturers (44%), professional services (30%) and information/communications businesses (28%)
- Large employers (41% of those with 50+ employees).

Plans to have dealings with international markets in the future are also highest amongst manufacturers (6%) and information/communication businesses (5%).

Three-fifths of employers that deal with international markets export to these markets (60%) and around half of all employers with international dealings have other business relations, such as good contact links, networks, parent and subsidiary company links (47%). Links are most prevalent with Europe-based markets (around four-fifths), while around two-fifths of those that import or export have dealings with China and/or North America.

Figure 26: Locations where businesses export/import (where export/import)



Q62 unweighted bases in parentheses

7.2 Interest in emerging economies

One-in-seven businesses in Greater Manchester (15%) have an interest in developing business links with BRIC countries (Brazil, Russia, India and China), or other emerging economies. This compares with a higher proportion in 2012 (26%). Although there is similar level of interest in the individual BRIC countries, China is top amongst Greater Manchester businesses (7%), followed by the Middle East (6%), India (5%), Russia (4%) and Brazil (3%). One in twenty businesses (5%) mentioned other emerging economies. These proportions are similar to those reported in 2012.

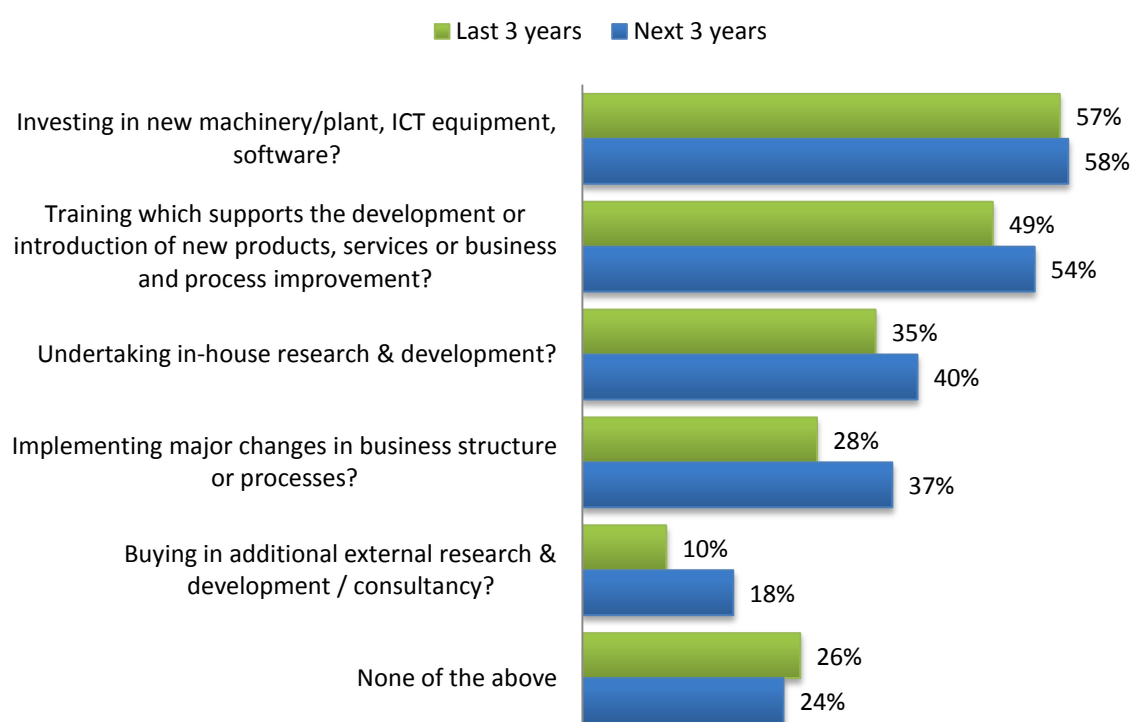
8 Innovation and technology

8.1 Innovation activities undertaken or planned

Three-quarters of Greater Manchester businesses (74%) have engaged in innovation activities in the last 3 years. This compares with 79% in 2012.

Respondents are most likely to have invested in new machinery/plant, ICT equipment and software (57%), as was the case in 2012 (63%). Around half (49%) have undertaken training which supports the development or introduction of new products, services or business and process improvement (45% in 2012).

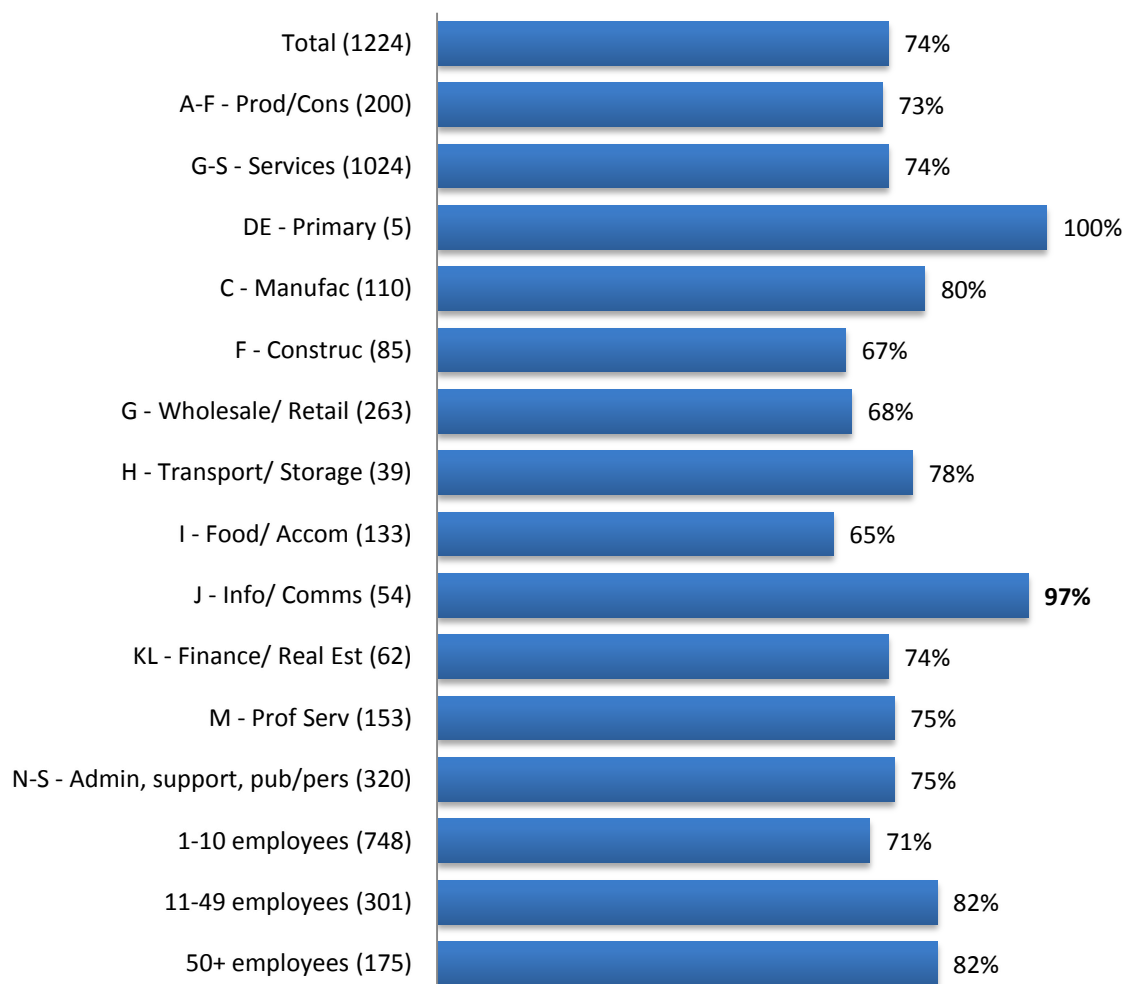
Figure 27: Innovation activities undertaken or planned (all respondents)



Q64-Q65, unweighted base = 1224

Innovation activity is most prevalent amongst information/communication businesses (97%) and least likely within food/accommodation services (65%).

Figure 28: Proportion of businesses which have innovated in the last 3 years, by industry sector and size (all respondents)



Q64, unweighted bases in parentheses

Figures in bold are significantly higher than average

Just over three-quarters of businesses (76%) plan to undertake innovation activities in the next 3 years. This is a similar proportion to that reported in 2012 (77%). Information/communications businesses, manufacturing, and transport businesses were most likely to have invested in innovation in the last three years.

The two most likely activities that might be undertaken are investment in new machinery/plant, ICT equipment and software (58%; 63% in 2012) and training which supports the development or introduction of new products, services or business and process improvement (54%; 53% in 2012).

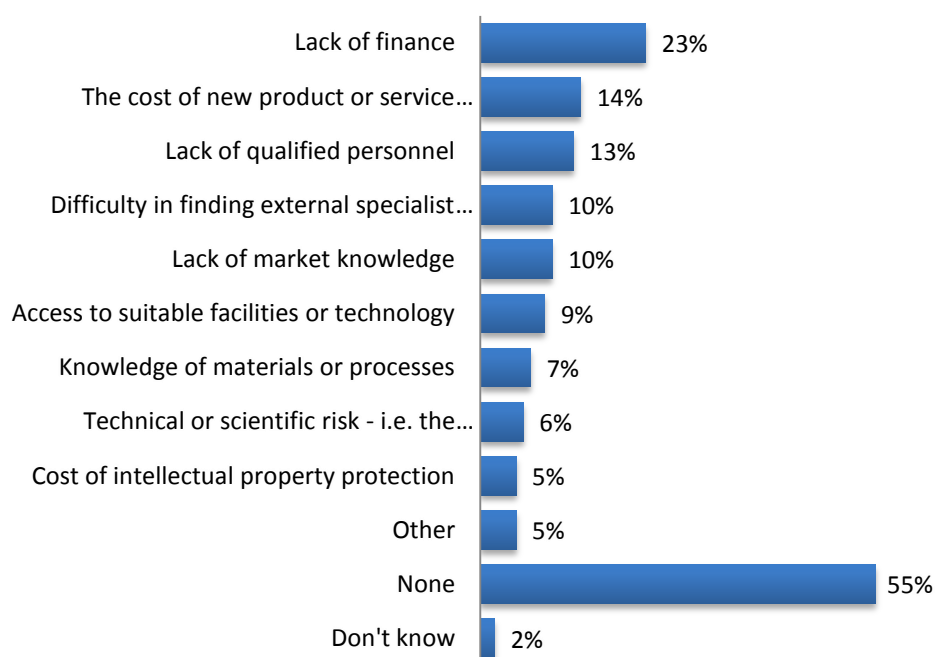
Information/communications businesses are significantly more likely than average to be planning to undertake investment in new machinery/plant, ICT equipment/software (82%) and training which supports the development or introduction of new products, services or business and process improvement (74%).

8.2 Constraints to innovation

More than two-fifths of all businesses (43%) have experienced some constraints on innovation, however, this is a lower proportion than those reporting barriers to innovation in 2012 (68%).

Lack of finance was the most frequently mentioned constraint to innovation (23%). This is also a contributing issue to another key constraint, that of the cost of new product or service development (14%). Lack of qualified personnel is also relatively significant in holding innovation back (13%).

Figure 29: Constraints to innovation – prompted, multiple response (all respondents)



Q66, unweighted base = 1224

8.3 Internet connection speed

More than a quarter of businesses (28%) have considered getting a faster or more reliable connection to the internet. This compares with 26% in 2012. Just under half of those that have considered a faster, more reliable connection are currently organising it (13% of all respondents). A further 9% of all businesses have not yet arranged it, 1% has considered it but found it to be too expensive.

8.4 Barriers to adopting digital technologies

A third of all businesses (34%) report some barriers to adopting digital technologies, including broadband and cloud services, which would improve their business. Speeds of local connectivity is the most frequently mentioned (15%), with lack of investment i.e. finance not being available to invest in new staff/training, hardware, software or connectivity that is required, reported a close second (14%).

One-in-eight businesses cited a lack of knowledge about the technology available, the business benefits or the risks involved (13%) and one in ten, the lack of skills within the business to implement new technology (10%).

9 Recruitment and skills

9.1 Staff training activity

Nearly three-quarters of Greater Manchester businesses (71%) have provided internal training in the last 12 months and around two-fifths (39%) have provided external training. Just over a fifth (21%) have not provided any training in 2013.

The incidence of internal training is higher than in 2012 (44%), while the incidence of external training is at a similar level to 12 months ago (41%).

Overall, 79% of all businesses have provided any training (internal and/or external) in 2013, compared with 60% in 2012.

Levels of internal training have been higher than average within:

- Transport/storage (85%); wholesale/retail (81%); administration/support/public and personal services (78%) and food/accommodation (75%)
- Larger businesses: 92% of those with 11-49 employees; 96% of those with 50+ employees

Levels of external training have been higher than average within:

- Construction (61%); professional services (48%); information/communication (46%); and administration/support/public and personal services (42%)
- Larger businesses: 52% of those with 11-49 employees; 61% of those with 50+ employees

9.2 Proportion of the workforce qualified to degree level

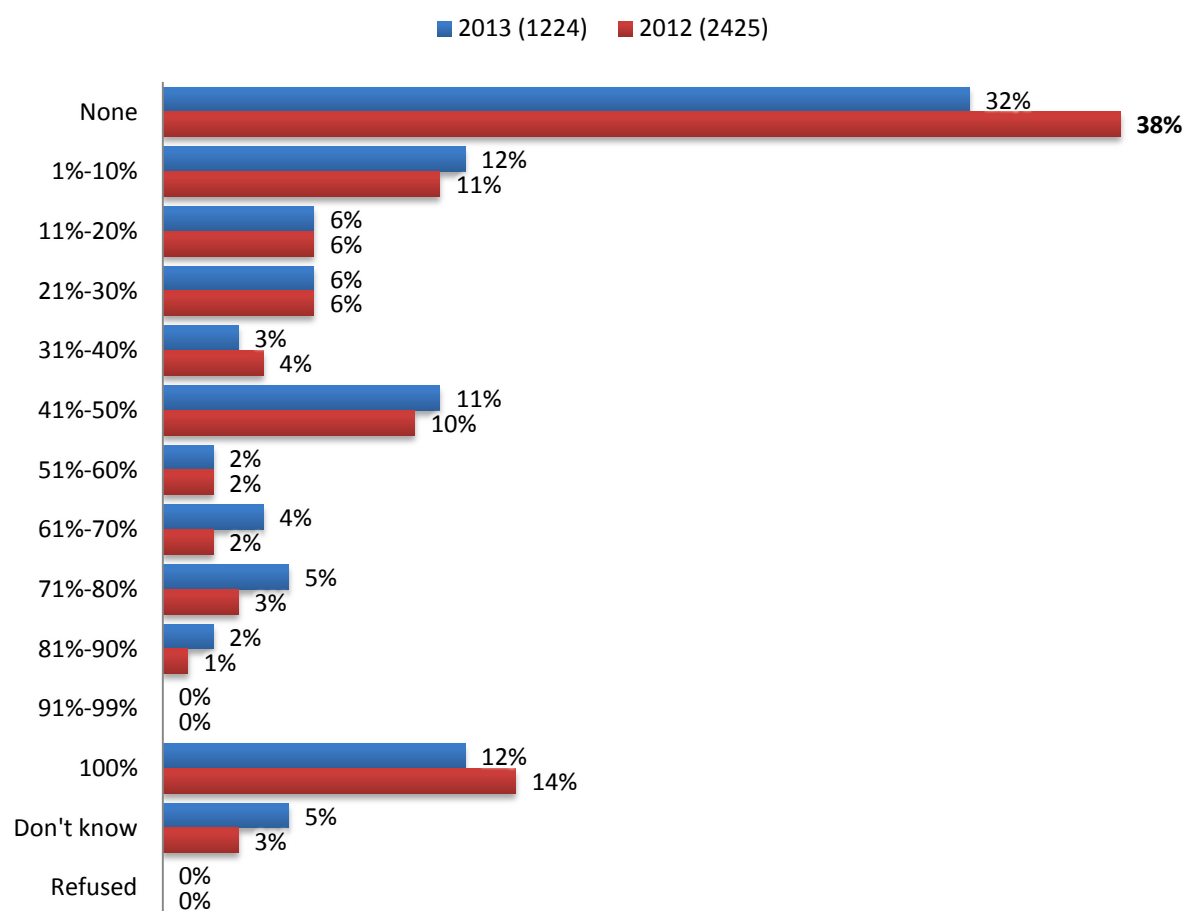
A third of Greater Manchester businesses (32%) reported having no employees qualified to degree level. This is a lower proportion than that of 2012 (38%).

By contrast, one in eight businesses (12%) reported that all their employees are qualified to degree level. This is a similar proportion to that of 2012 (14%).

The mean proportion of staff qualified to degree level is 41%, which is higher than the mean reported in 2012 (30%).

Businesses least likely to have graduates within their workforce are those in construction (61% have none) and wholesale/retail (42% have none).

Figure 30: Proportion of the workforce qualified to degree level – a year on year comparison (all respondents)



Q70, unweighted bases in parentheses

Figures in bold are significantly higher than comparison figure

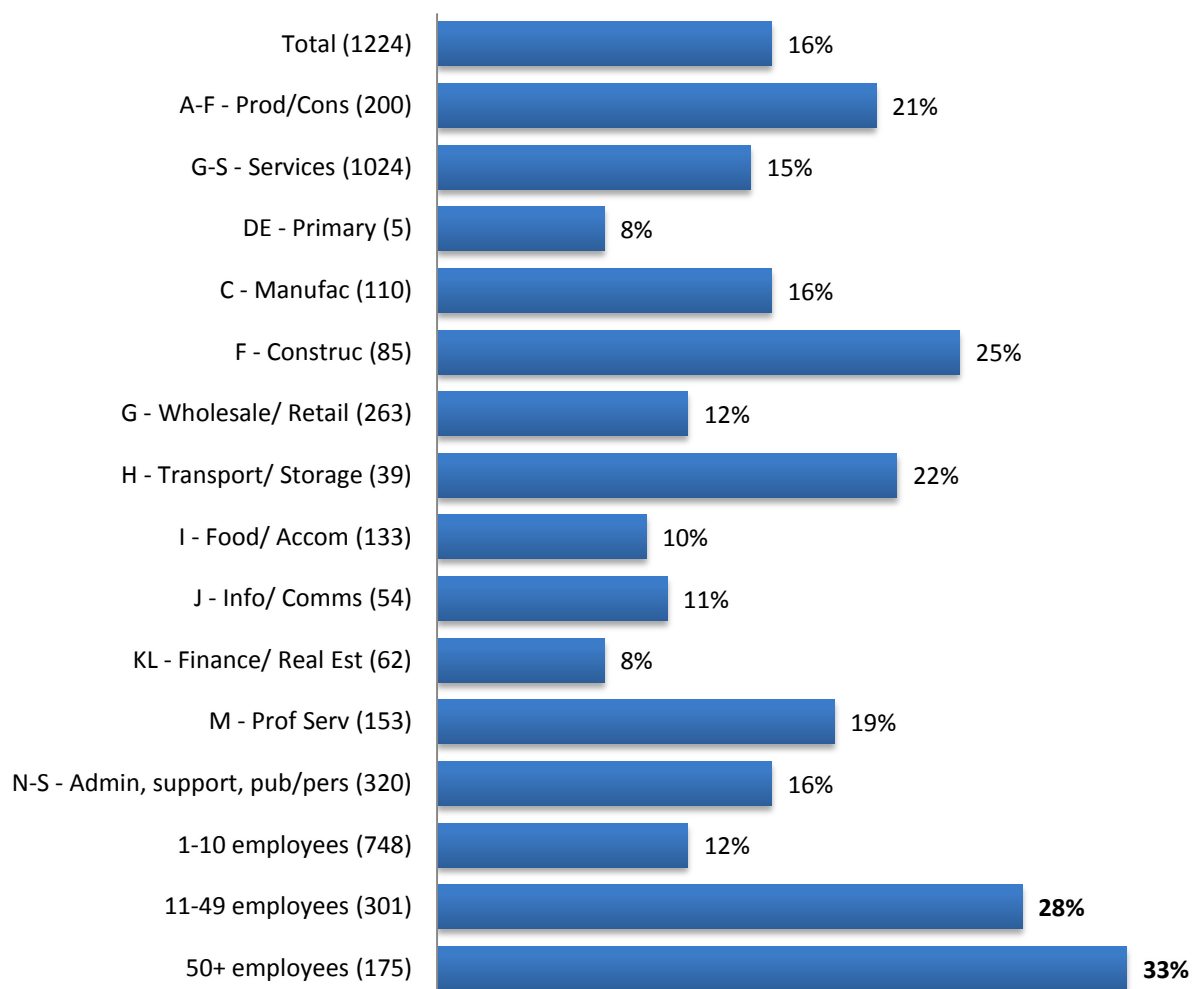
9.3 Employment of Apprentices

Overall, one in six Greater Manchester businesses (16%) currently employs any apprentices, irrespective of age group. This compares with 20% in 2012.

The majority of those employing apprentices employ those aged under 25; 8% of all businesses employ apprentices aged 16 to 18; 10% employ apprentices aged 19 to 24 and 3% employ apprentices aged 25 or older.

The proportion of businesses employing any apprentices increases to 25% within construction, to 28% within businesses with 11 to 49 employees, and to 33% of those with 50+ employees.

Figure 31: Current employment of Apprentices (all respondents)

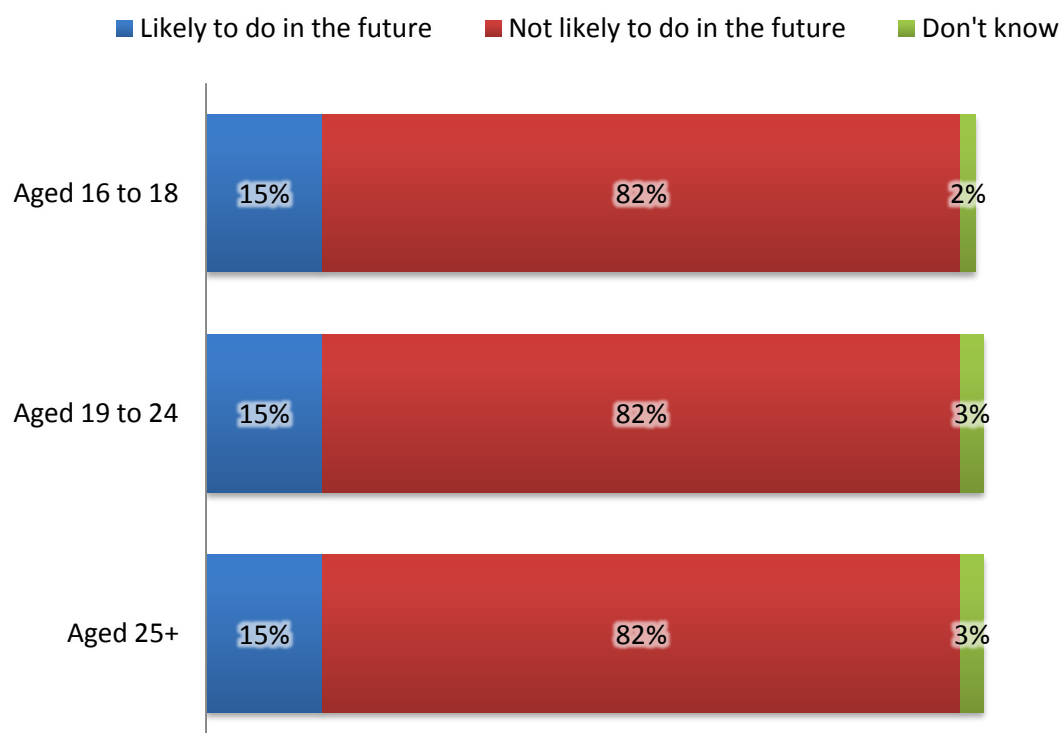


Q71, unweighted base = 1224

Figures in bold are significantly higher than average

Of those that do not currently employ apprentices, 15% consider that they are likely to employ apprentices aged 16 to 18 in the future; and this proportion is the same for apprentices aged 19 to 24 and 25 and older.

Figure 32: Likelihood of employing Apprentices in the future (where do not currently employ Apprentices)



Q72, unweighted base = 982

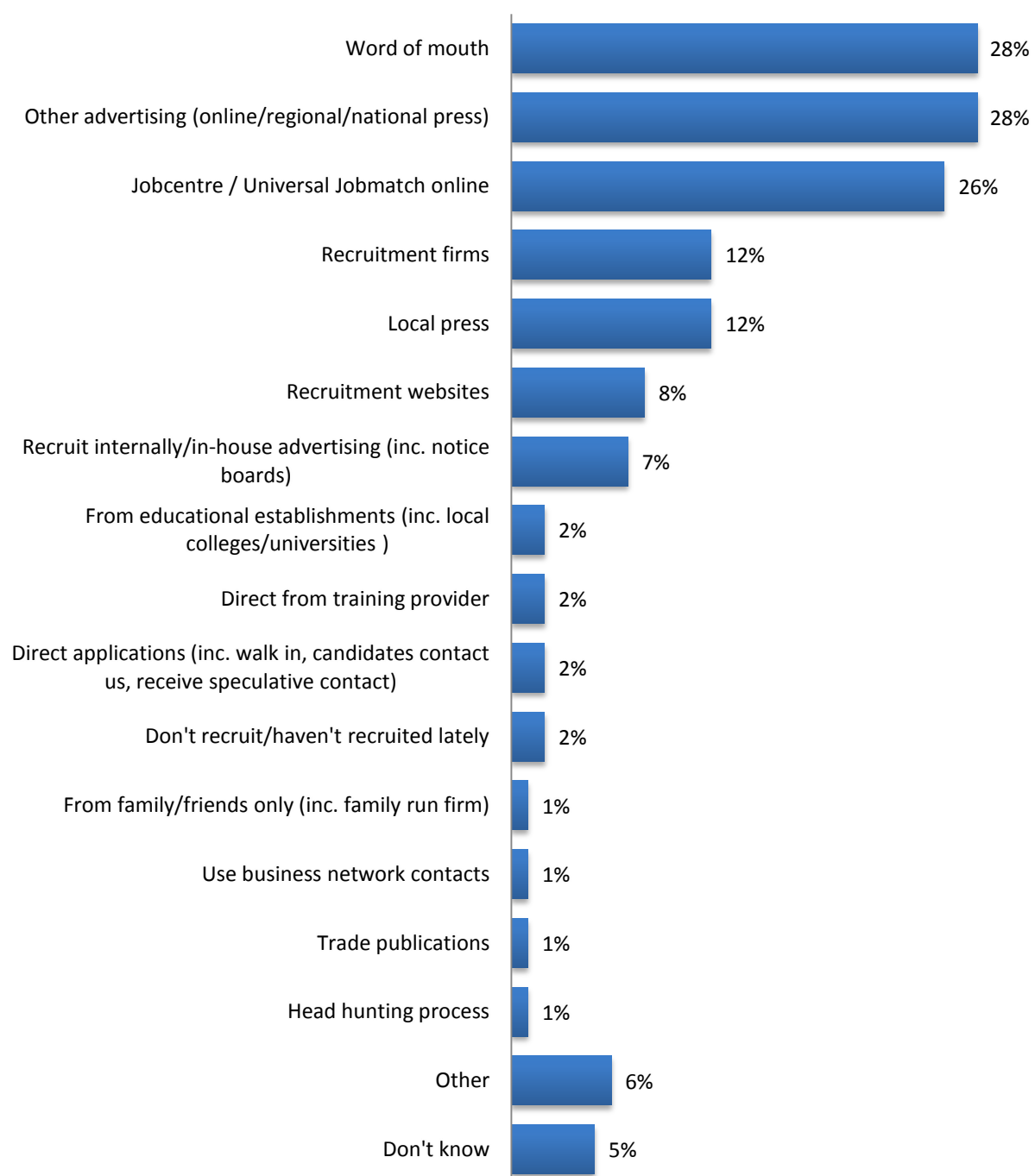
9.4 Recruitment methods

When asked, unprompted, how employers typically recruit for new staff, more than a quarter cited word of mouth and advertising i.e. online or in region or national press (both 28%). Around a quarter (26%) cited the jobcentre or Universal Jobmatch online.

Employers in construction (51%), information/communication (46%), and manufacturing (39%) are particularly likely to use word of mouth. Whereas those in food/accommodation (53%) and administration/support/public and personal services (35%) are particularly likely to use advertising.

Smaller employers were more likely than larger ones to use word of mouth while larger employers were more likely to use the jobcentre/Universal Jobmatch online, recruitment firms and other advertising.

Figure 33: Recruitment methods (all respondents)



Q73, unweighted base = 1224

9.5 Recruitment difficulties

Around one in twenty Greater Manchester employers (6%) had any hard-to-fill vacancies at the time of interviewing. This is the same proportion as in 2012. This figure also compares to the national average of 5% reported in the Employers Skills Survey (UKCES2013).

The proportion increased to 18% of employers with 50 or more employees.

A third of employers experiencing hard-to-fill vacancies (21%) cite professional occupations as those in which they have had problem recruiting in the last year. One in six (18%) cited skilled trades, while one in seven cited process, plant and machine operative (15%) and associate professional and technical occupations (14%). Around one in ten have experienced difficulties recruiting into elementary (10%), personal service (9%), sales and customer service (9%), administrative and secretarial (8%) and managerial/senior official (8%) occupations.

The predominant reason for recruitment difficulties has been the low number of applicants with the required skills/qualifications (47%), while lack of work experience and a low number of applicants with the required work ethic is cited by around a fifth (22% and 21% respectively). Fewer cited not enough people interested in doing the type of job they have been looking to recruit into (15%), poor working conditions (10%), poor perceptions of the sector/lack of prospects (4%), and poor transport links (3%).

Where skills have been difficult to find in applicants, the most challenging skills problems relate to technical/specialist/craft skills, specified by over two-thirds (67%) of employers with skill shortages, followed by team and communications skills (15%), and literacy skills (15%).

9.6 Skills gaps

When asked about skills gaps within their workforce, around one in five businesses (22%) said that they have experiences skills gaps in their current workforce that had prevented them from meeting their current business objectives. This compares to one in seven (15%) firms reporting skills gaps across the UK in the 2013 National Employers Skills Survey (UKCES 2013).

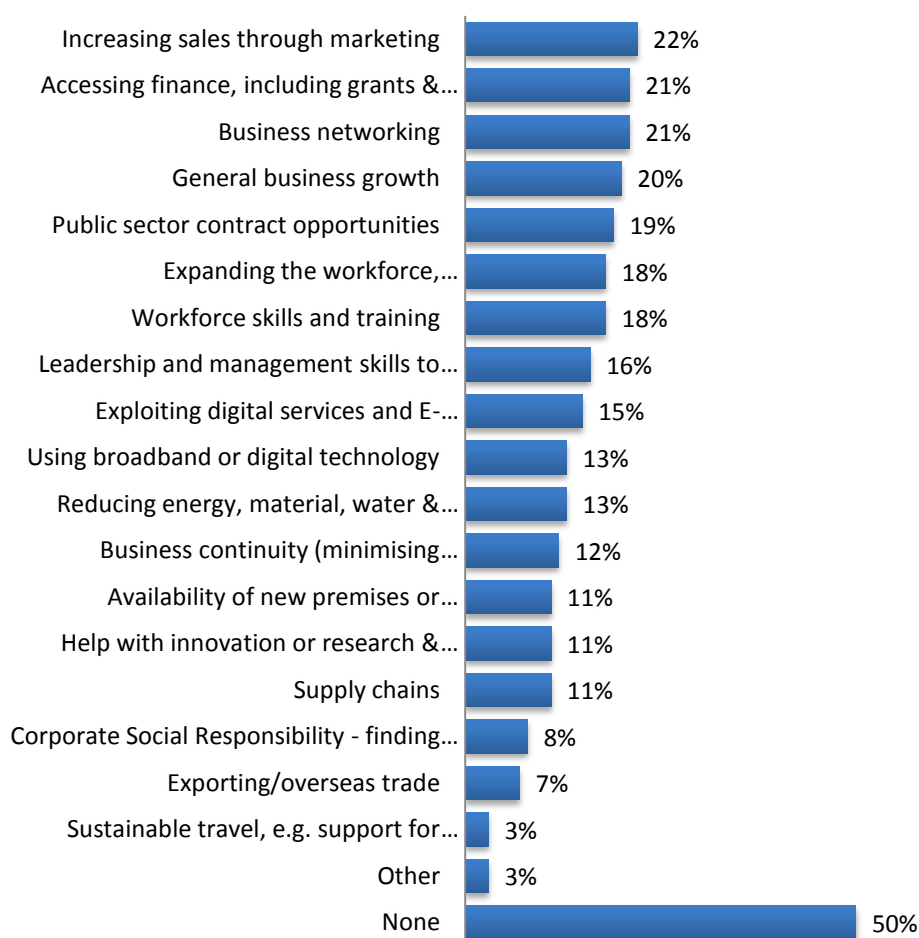
The most frequently cited skills gap reported in Greater Manchester was technical/specialist/craft skills (9%). Other skill gap characteristics reported by employers included: computer skills (3%), sales/marketing skills (3%), communication skills (2%), customer handling skills (2%), personal skills (2%), management and leadership skills (2%); and just one per cent of all businesses cited any of - numeracy skills, literacy skills, problem solving skills, finance/accountancy and business skills.

10 Re-contacting respondents

10.1 Services which businesses would be interested in being re-contacted about

Respondents indicating that their business is likely to use support or advice in the foreseeable future were asked if they wanted contact from their local authority about it. More than half were interested in being re-contacted. Up to a fifth specified an area of support where they would like more contact, shown in the figure below.

Figure 34: Areas of business support or advice that businesses would like to be contacted about – prompted, multiple response



Q53, unweighted base = 819

10.2 Interest in receiving a summary of the results

Nearly two-fifths of respondents (38%) expressed interest in receiving a summary of the result of the survey. This proportion is highest amongst businesses with a headquarters based in Greater Manchester. It is particularly high amongst those that have dealings internationally (45%) and is significantly higher amongst businesses that have undertaken innovation investment and have used business support services.

Appendix 1: Profile of businesses in Greater Manchester

Figure 35: Profile of employers in Greater Manchester (all respondents, weighted data)

Type of organisation	
A private business	83%
A voluntary/non profit-making organisation	17%
Size of organisation	
1-10	77%
11-49	18%
50-199	3%
200-249	<0.5%
250+	1%
Don't know/refused	0%
Percentage of full time workforce	
None	9%
1%-10%	3%
11%-20%	3%
21%-30%	6%
31%-40%	5%
41%-50%	13%
51%-60%	2%
61%-70%	4%
71%-80%	9%
81%-90%	6%
91%-99%	3%
100%	36%
Don't know	1%
Refused	<0.5%

Percentage of part time workforce	
None	35%
1%-10%	7%
11%-20%	7%
21%-30%	6%
31%-40%	5%
41%-50%	13%
51%-60%	2%
61%-70%	6%
71%-80%	6%
81%-90%	3%
91%-99%	1%
100%	9%
Don't know	2%
Refused	<0.5%
Industry Sector (SIC 2007)	
C - Manufacturing	7%
E - Water supply, sewerage, waste management and remediation activities	<0.5%
F - Construction	9%
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	19%
H - Transportation and storage	3%
I - Accommodation and food service activities	7%
J - Information and communication	4%
K - Financial and insurance activities	3%
L - Real estate activities	2%
M - Professional, scientific and technical activities	14%
N - Administrative and support service activities	9%
P - Education	4%
Q - Human health and social work activities	9%
R - Arts, entertainment and recreation	4%
S - Other service activities	6%

Legal status of business	
Sole proprietorship	3%
Private limited company, limited by shares (LTD.)	69%
Public Ltd Company (PLC)	5%
Partnership	2%
Limited liability partnership	1%
Private company limited by guarantee	3%
Community Interest Company (CIC, limited by guarantee or shares)	1%
Friendly Society	<0.5%
A Co-operative	<0.5%
Industrial and Provident Society	<0.5%
Private Unlimited Company	<0.5%
Foreign Company	<0.5%
A trust	2%
An unincorporated association	<0.5%
Other	8%
Don't know	4%
Refused	0%
Number of sites	
Single site	58%
This site is a branch/subsidiary	33%
This site is HQ	9%
Don't know	0%
Refused	0%
Location of head office (where branch/subsidiary)	
Inside Greater Manchester	20%
Outside Greater Manchester, but inside the Northwest	14%
In the UK, but outside the Northwest	62%
Europe	2%
US	1%
Rest of World	1%
Don't know	1%

Annual turnover	
Less than £79,000 [VAT threshold]	10%
£79,000 - £250,000	22%
£250,000 - £0.5M	15%
£0.5M - £1M	7%
£1M - £5M	10%
£5M - £10M	2%
£10M - £25M	1%
£25M+	1%
Don't know	16%
Refused	16%
Length in business	
Less than 12 months	1%
1 up to 2 years	2%
Over 2 up to 3 years	1%
Over 3 up to 5 years	7%
6 to 10 years	16%
11 to 20 years	23%
Over 20 years	46%
Don't know	2%

Appendix 2: Growth businesses summary

This chapter discusses growth businesses in more detail. Each of the sections below contain a table showing the total (proportion across the whole of Greater Manchester), the figure among growth businesses, and within growth businesses the figure by size band (number of employees) and grouped services (Production/construction and Services).

Significantly higher results that suggest improvement or a move in an otherwise positive direction are shaded in green; significantly lower results that suggest deterioration are shaded in red.

Business growth

Not surprisingly, given the definition of this group of businesses, growth businesses are significantly more likely to have experienced and anticipate increases in both staff and turnover than businesses across Greater Manchester as a whole.

They are also more likely to cite products/services the company provides as a key driver of growth.

Medium sized and larger businesses are more likely to have experienced increased staffing levels in the last 12 months than smaller businesses, whilst the latter group are more likely to have experienced decreased staffing levels or stability on this indicator. Larger businesses are more likely to forecast an increase in staffing levels in the next 12 months, whilst those in production/construction are more likely to forecast a decrease in staffing levels.

Smaller and medium sized growth businesses are more likely to mention their products/services as a key driver of growth. In contrast, larger businesses are more likely to mention workforce & skills.

Figure 36: Key indicators of business growth

	No. of employees					Grouped sector	
	Total	Growth	1-10	11-49	50+	Prod- uction	Services
Changes in staff in the last 12 months							
Increased	22%	68%	57%	86%	95%	67%	68%
Decreased	15%	7%	11%	1%	1%	1%	9%
Stayed the same	63%	25%	32%	14%	4%	32%	23%
Changes in staff the next 12 months							
Increase	25%	47%	44%	52%	62%	32%	50%
Decrease	5%	3%	3%	2%	1%	7%	2%
Stayed the same	66%	46%	47%	45%	36%	55%	44%
Changes in turnover in the last 12 months							
Increased	35%	86%	86%	85%	81%	86%	86%
Decreased	23%	3%	3%	*%	3%	6%	2%
Stayed the same	32%	10%	9%	12%	11%	8%	10%
Changes in turnover in the next 12 months							
Increase	50%	74%	72%	77%	80%	72%	74%
Decrease	7%	1%	2%	*%	0%	0%	1%
Stayed the same	33%	22%	23%	22%	15%	26%	21%
Drivers for growth							
Products and services the company provides	53%	62%	64%	62%	36%	67%	61%
Workforce and Skills	47%	49%	47%	49%	69%	40%	51%
Unweighted bases	1224	306	153	96	57	55	251

Local area and community

Growth businesses are equally likely to be satisfied with road transport and public transport access as those across Greater Manchester, but are more likely to be satisfied with business rate costs. They are also more likely to support the local economy/community by actively reducing company waste and trying to improve their energy efficiency.

Smaller and medium sized growth businesses are more likely to be satisfied with business rate costs than larger businesses. Furthermore, medium sized businesses are more likely to be satisfied with affordability of premises, and to be considering relocation than larger businesses.

Larger businesses are more likely to actively reduce company waste or try to improve their energy efficiency than medium sized or smaller businesses.

Figure 37: Key indicators of local area and community

	No. of employees					Grouped sector	
	Total	Growth	1-10	11-49	50+	Production	Services
Satisfaction with local area (% saying very/fairly satisfied)							
Road transport access	69%	71%	69%	81%	53%	82%	69%
Access to Public transport ie Bus/Train/Metro	66%	68%	69%	69%	62%	63%	69%
Dissatisfaction with local area (% saying very/fairly satisfied)							
Business rate costs	22%	28%	31%	24%	5%	33%	26%
Affordability of premises	36%	41%	39%	49%	31%	45%	40%
Broadband speed	46%	42%	39%	50%	46%	51%	41%
Whether considering relocating							
Yes	11%	14%	11%	22%	10%	16%	13%
Support for the local economy and community (% saying currently applies)							
We actively reduce company waste	88%	94%	93%	93%	100%	92%	94%
We actively try to improve our energy efficiency	87%	92%	94%	87%	99%	94%	92%
Unweighted bases	1224	306	153	96	57	55	251

Business support

Growth businesses are more likely to have used business support services in the last 12 months than Greater Manchester businesses in general.

There are no significant differences by size or sector among growth businesses.

Figure 38: Key indicators of business support

	No. of employees					Grouped sector	
	Total	Growth	1-10	11-49	50+	Prod- uction	Services
Use of business support							
Used any to start up business (where started up in last 3 years)	60%	61%	63%	55%	65%	68%	60%
Used any in the last 12 months	50%	60%	62%	54%	60%	68%	59%
Business mentoring							
Used a business mentor in the last 12 months	10%	9%	7%	11%	14%	6%	9%
Currently acting as a business mentor	4%	6%	5%	6%	7%	7%	5%
Unweighted bases	1224	306	153	96	57	55	251

Export, trade and connectivity

Growth businesses are more likely to have export, import and other international links than businesses across Greater Manchester.

Figure 39: Key indicators of export, trade and connectivity

	No. of employees					Grouped sector	
	Total	Growth	1-10	11-49	50+	Prod- uction	Services
Trades internationally							
Has export, import and other international links	19%	29%	30%	29%	27%	38%	28%
Unweighted bases	1224	306	153	96	57	55	251

Innovation and technology

Growth businesses are more likely to have undertaken innovation activities in the last three years than Greater Manchester businesses generally, although this does not vary significantly by size or sector within this group.

Figure 40: Key indicators of innovation and technology

	No. of employees					Grouped sector	
	Total	Growth	1-10	11-49	50+	Prod- uction	Services
Innovation activities							
Any innovation activities undertaken	74%	84%	85%	83%	82%	84%	84%
Unweighted bases	1224	306	153	96	57	55	251

Recruitment and skills

Growth businesses are more likely to have undertaken training in the last 12 months than businesses in general.

Within the growth business sector, medium sized and larger businesses are more likely to have undertaken training than smaller businesses. Interestingly, production/construction businesses are among those most likely to use external training for their workforce.

Figure 41: Key indicators of recruitment and skills

	No. of employees					Grouped sector	
	Total	Growth	1-10	11-49	50+	Prod- uction	Services
Training in the last 12 months							
Internal training	71%	79%	73%	92%	91%	71%	81%
External training	39%	52%	48%	57%	61%	67%	49%
Any training	79%	89%	84%	98%	99%	91%	88%
Unweighted bases	1224	306	153	96	57	55	251

Appendix 3: Manchester businesses summary

This chapter discusses Manchester businesses in more detail. Each of the sections below contain a table showing the total (proportion across the whole of Greater Manchester), the figure among Manchester businesses, and within Manchester the figure by size band (number of employees) and grouped services (Production/construction and Services).

Significantly higher results that suggest improvement or a move in an otherwise positive direction are shaded in green; significantly lower results that suggest deterioration are shaded in red.

Business growth

Manchester businesses are significantly more likely to have experienced staff increases in the last 12 months compared to Greater Manchester businesses, with the latter more likely to have experienced stability. The picture is similar over the next 12 months, with Manchester businesses more likely to forecast an increase in staff. Indeed, Manchester businesses are also more likely to have experienced an increase in turnover in the last 12 months.

Medium sized and larger businesses are more likely to have experienced increasing staff numbers and turnover in the last 12 months than smaller businesses. In contrast, smaller businesses are more likely to have experienced stability.

Larger businesses are also more likely than other businesses to cite products & services the company provides as key drivers of growth.

Figure 42: Key indicators of business growth

	No. of employees					Grouped sector	
	Total	Manchester	1-10	11-49	50+	Prod- uction	Services
Changes in staff in the last 12 months							
Increased	22%	28%	21%	47%	50%	29%	28%
Decreased	15%	15%	16%	11%	9%	16%	15%
Stayed the same	63%	57%	63%	40%	41%	55%	57%
Changes in staff the next 12 months							
Increase	25%	33%	30%	40%	40%	30%	33%
Decrease	5%	5%	5%	4%	9%	9%	5%
Stayed the same	66%	58%	61%	55%	44%	55%	59%
Changes in turnover in the last 12 months							
Increased	35%	36%	32%	48%	44%	26%	37%
Decreased	23%	21%	24%	16%	16%	30%	21%
Stayed the same	32%	33%	35%	27%	25%	42%	32%
Changes in turnover in the next 12 months							
Increase	50%	56%	55%	61%	55%	63%	56%
Decrease	7%	6%	6%	6%	10%	4%	6%
Stayed the same	33%	29%	31%	24%	19%	26%	29%
Drivers for growth							
Products and services the company provides	53%	56%	53%	62%	67%	51%	56%
Workforce and Skills	47%	50%	49%	50%	60%	54%	50%
Unweighted bases	1224	501	305	117	79	52	449

Local area and community

Manchester businesses are more likely to be satisfied with access to public transport and quality of premises than Greater Manchester businesses. However, they are also more likely to be considering relocation.

Medium sized and larger businesses in Manchester are more satisfied with access to public transport and quality of premises than smaller businesses. In contrast, they are less likely to be considering relocation.

Larger businesses are more likely to be actively reducing company waste and trying to improve energy efficiency than other businesses.

Figure 43: Key indicators of local area and community

	No. of employees					Grouped sector	
	Total	Manchester	1-10	11-49	50+	Production	Services
Satisfaction with local area (% saying very/fairly satisfied)							
Access to Public transport ie Bus/Train/Metro	66%	80%	77%	87%	90%	76%	80%
Road transport access	69%	68%	66%	74%	69%	75%	67%
Quality of premises	55%	61%	56%	74%	72%	54%	62%
Dissatisfaction with local area (% saying very/fairly satisfied)							
Business rate costs	22%	23%	24%	19%	21%	28%	22%
Affordability of premises	36%	39%	38%	39%	43%	38%	39%
Whether considering relocating							
Yes	11%	16%	18%	9%	8%	19%	15%
Support for the local economy and community (% saying currently applies)							
We actively reduce company waste	88%	88%	87%	90%	97%	87%	88%
We actively try to improve our energy efficiency	87%	84%	84%	82%	98%	93%	83%
Unweighted bases	1224	501	305	117	79	52	449

Business support

Manchester businesses are similar to Greater Manchester businesses in their use of business support and mentoring. There are also no differences within Manchester by size or sector of business.

Figure 44: Key indicators of business support

	No. of employees					Grouped sector	
	Total	Manchester	1-10	11-49	50+	Prod- uction	Services
Use of business support							
Used any to start up business (where started up in last 3 years)	60%	59%	57%	64%	0%	74%	57%
Used any in the last 12 months	50%	55%	55%	51%	64%	53%	55%
Business mentoring							
Used a business mentor in the last 12 months	10%	13%	12%	18%	12%	14%	13%
Currently acting as a business mentor	4%	4%	4%	4%	4%	0%	5%
Unweighted bases	1224	501	305	117	79	52	449

Export, trade and connectivity

Manchester businesses are more likely to have export, import or other international links than Greater Manchester businesses as a whole.

Larger businesses within Manchester are the most likely to have these links.

Figure 45: Key indicators of export, trade and connectivity

	No. of employees					Grouped sector	
	Total	Manchester	1-10	11-49	50+	Prod- uction	Services
Trades internationally							
Has export, import and other international links	19%	25%	24%	24%	47%	23%	26%
Unweighted bases	1224	501	305	117	79	52	449

Innovation and technology

Slightly more (though not significantly so) Manchester businesses have undertaken innovation activities in the last three years than Greater Manchester businesses.

Figure 46: Key indicators of innovation and technology

	No. of employees					Grouped sector	
	Total	Manchester	1-10	11-49	50+	Production	Services
Innovation activities							
Any innovation activities undertaken	74%	78%	76%	82%	81%	76%	78%
Unweighted bases	1224	501	305	117	79	52	449

Recruitment and skills

Training levels are similar in Manchester compared to Greater Manchester. However, Manchester medium sized and larger businesses are more likely to undertake training than smaller businesses.

Figure 47: Key indicators of recruitment and skills

	No. of employees					Grouped sector	
	Total	Manchester	1-10	11-49	50+	Production	Services
Training in the last 12 months							
Internal training	71%	73%	66%	92%	93%	64%	74%
External training	39%	41%	36%	51%	62%	44%	40%
Any training	79%	80%	74%	96%	98%	75%	80%
Unweighted bases	1224	501	305	117	79	52	449

Appendix 4: Trafford businesses summary

This chapter discusses Trafford businesses in more detail. Each of the sections below contain a table showing the total (proportion across the whole of Greater Manchester), the figure among Trafford businesses, and within Trafford the figure by size band (number of employees) and grouped services (Production/construction and Services).

Significantly higher results that suggest improvement or a move in an otherwise positive direction are shaded in green; significantly lower results that suggest deterioration are shaded in red.

Business growth

Trafford businesses have experienced similar levels of growth and decline as businesses across the whole of Greater Manchester, with the key drivers of growth being products/services the company provides and workforce & skills. The only area where it differs significantly is the higher proportion of businesses where staff numbers have stayed the same in the last 12 months.

Medium sized businesses in Trafford are more likely to have experienced and forecast growth in staff numbers and turnover than smaller businesses. Smaller businesses are more likely to perceive stability in these areas.

Medium sized businesses are also more likely to believe that products/services the company provides are a key driver of growth than smaller businesses.

Figure 48: Key indicators of business growth

	No. of employees					Grouped sector	
	Total	Trafford	1-10	11-49	50+	Prod- uction	Services
Changes in staff in the last 12 months							
Increased	22%	16%	8%	47%	50%	12%	17%
Decreased	15%	11%	10%	10%	24%	14%	10%
Stayed the same	63%	73%	82%	41%	27%	73%	73%
Changes in staff the next 12 months							
Increase	25%	26%	22%	37%	40%	28%	25%
Decrease	5%	3%	3%	4%	0%	9%	2%
Stayed the same	66%	71%	75%	56%	57%	64%	72%
Changes in turnover in the last 12 months							
Increased	35%	32%	28%	45%	46%	39%	31%
Decreased	23%	27%	29%	17%	39%	51%	23%
Stayed the same	32%	35%	37%	26%	15%	9%	39%
Changes in turnover in the next 12 months							
Increase	50%	48%	44%	60%	67%	22%	52%
Decrease	7%	6%	8%	1%	0%	18%	4%
Stayed the same	33%	37%	39%	29%	26%	60%	33%
Drivers for growth							
Products and services the company provides	53%	58%	54%	75%	54%	53%	59%
Workforce and Skills	47%	46%	44%	56%	48%	52%	45%
Unweighted bases	1224	186	114	57	15	21	165

Local area and community

Trafford businesses are more likely to be satisfied with the local area in terms of road transport access and crime & anti-social behaviour than Greater Manchester businesses. They are less likely to be satisfied with business rate costs.

There are no significant differences by size or sector within Trafford.

Figure 49: Key indicators of local area and community

	No. of employees					Grouped sector	
	Total	Trafford	1-10	11-49	50+	Production	Services
Satisfaction with local area (% saying very/fairly satisfied)							
Road transport access	69%	77%	78%	72%	74%	99%	74%
Access to Public transport ie Bus/Train/Metro	66%	63%	65%	55%	57%	77%	61%
Crime and anti-social behaviour	42%	62%	61%	62%	77%	98%	56%
Dissatisfaction with local area (% saying very/fairly satisfied)							
Business rate costs	22%	14%	15%	13%	8%	26%	12%
Affordability of premises	36%	32%	30%	40%	18%	29%	32%
Whether considering relocating							
Yes	11%	10%	10%	12%	0%	6%	11%
Support for the local economy and community (% saying currently applies)							
We actively reduce company waste	88%	92%	91%	97%	87%	96%	91%
We actively try to improve our energy efficiency	87%	84%	82%	91%	100%	78%	85%
Unweighted bases	1224	186	114	57	15	21	165

Business support

Trafford businesses have used similar levels of support and mentoring as Greater Manchester businesses, with the exception that they are less likely to have used a business mentor in the last 12 months.

There are no significant differences by size or sector.

Figure 50: Key indicators of business support

	No. of employees					Grouped sector	
	Total	Trafford	1-10	11-49	50+	Production	Services
Use of business support							
Used any to start up business (where started up in last 3 years)	60%	100%	100%	100%	0%	0%	100%
Used any in the last 12 months	50%	47%	47%	45%	47%	62%	44%
Business mentoring							
Used a business mentor in the last 12 months	10%	5%	5%	7%	0%	0%	6%
Currently acting as a business mentor	4%	5%	5%	5%	0%	1%	5%
Unweighted bases	1224	186	114	57	15	21	165

Export, trade and connectivity

Slightly more (though not significantly so) Trafford businesses have export, import or other international links compared to Greater Manchester businesses as a whole.

Figure 51: Key indicators of export, trade and connectivity

	No. of employees					Grouped sector	
	Total	Trafford	1-10	11-49	50+	Production	Services
Trades internationally							
Has export, import and other international links	19%	22%	20%	25%	64%	21%	22%
Unweighted bases	1224	186	114	57	15	21	165

Innovation and technology

More than seven in ten Trafford businesses have undertaken innovation activities in the last three years, rising to more than eight in ten medium sized businesses. The data is similar to that for Greater Manchester.

Figure 52: Key indicators of innovation and technology

	No. of employees					Grouped sector	
	Total	Trafford	1-10	11-49	50+	Prod- uction	Services
Innovation activities							
Any innovation activities undertaken	74%	72%	69%	85%	77%	80%	71%
Unweighted bases	1224	186	114	57	15	21	165

Recruitment and skills

Slightly more (though not significantly so) Trafford businesses have undertaken training the last 12 months compared to Greater Manchester businesses.

Medium sized businesses in Trafford are more likely to have undertaken training than smaller businesses.

Figure 53: Key indicators of recruitment and skills

	No. of employees					Grouped sector	
	Total	Trafford	1-10	11-49	50+	Prod- uction	Services
Training in the last 12 months							
Internal training	71%	74%	68%	98%	100%	69%	75%
External training	39%	44%	41%	53%	69%	65%	41%
Any training	79%	85%	81%	98%	100%	91%	84%
Unweighted bases	1224	186	114	57	15	21	165

Appendix 5: Rochdale businesses summary

This chapter discusses Rochdale businesses in more detail. Each of the sections below contain a table showing the total (proportion across the whole of Greater Manchester), the figure among Rochdale businesses, and within Rochdale the figure by size band (number of employees) and grouped services (Production/construction and Services).

Significantly higher results that suggest improvement or a move in an otherwise positive direction are shaded in green; significantly lower results that suggest deterioration are shaded in red.

Business growth

The proportion of Rochdale businesses which are growing or declining are similar to those across the whole of Greater Manchester. The main growth drivers are products/services the company provides and workforce & skills, again similar to those across Greater Manchester.

Smaller businesses in Rochdale are more likely to feel that there will be no change in staff in the next 12 months, whilst medium sized businesses say they are more likely to increase. Production businesses are more likely to have experienced no change in turnover in the last 12 months.

Figure 54: Key indicators of business growth

	No. of employees					Grouped sector	
	Total	Rochdale	1-10	11-49	50+	Production	Services
Changes in staff in the last 12 months							
Increased	22%	18%	15%	23%	51%	13%	20%
Decreased	15%	17%	19%	10%	14%	23%	15%
Stayed the same	63%	65%	66%	67%	35%	64%	65%
Changes in staff the next 12 months							
Increase	25%	26%	19%	48%	53%	19%	28%
Decrease	5%	5%	6%	5%	0%	4%	6%
Stayed the same	66%	67%	73%	48%	47%	76%	65%
Changes in turnover in the last 12 months							
Increased	35%	33%	31%	37%	50%	26%	35%
Decreased	23%	24%	28%	11%	8%	18%	26%
Stayed the same	32%	37%	35%	47%	25%	53%	33%
Changes in turnover in the next 12 months							
Increase	50%	46%	41%	58%	64%	44%	46%
Decrease	7%	8%	9%	5%	0%	2%	10%
Stayed the same	33%	38%	40%	34%	19%	48%	36%
Drivers for growth							
Products and services the company provides	53%	56%	55%	57%	63%	43%	59%
Workforce and Skills	47%	50%	51%	45%	57%	54%	49%
Unweighted bases	1224	185	123	44	18	37	148

Local area and community

In terms of satisfaction with the local area, Rochdale businesses are significantly less likely to mention access to public transport than Greater Manchester businesses as a whole. They are also less likely to mention the image of the area.

In contrast, Rochdale businesses are more likely to mention promoting local trading compared to Greater Manchester businesses.

There are no significant differences in perceptions of local area and community across size or sector within Rochdale.

Figure 55: Key indicators of local area and community

	No. of employees					Grouped sector	
	Total	Rochdale	1-10	11-49	50+	Prod- uction	Services
Satisfaction with local area (% saying very/fairly satisfied)							
Road transport access	69%	66%	66%	65%	81%	55%	69%
Access to Public transport ie Bus/Train/Metro	66%	56%	55%	59%	45%	45%	58%
Dissatisfaction with local area (% saying very/fairly satisfied)							
Business rate costs	22%	20%	22%	15%	8%	23%	19%
Image of area	41%	26%	27%	19%	28%	30%	24%
Whether considering relocating							
Yes	11%	10%	11%	7%	7%	14%	9%
Support for the local economy and community (% saying currently applies)							
We actively try to improve our energy efficiency	87%	87%	87%	84%	98%	88%	87%
We actively reduce company waste	88%	87%	86%	89%	100%	84%	88%
We promote local trading	59%	68%	68%	73%	49%	74%	67%
We consider the environmental impact of our buying decisions	65%	68%	68%	62%	92%	68%	68%
Unweighted bases	1224	185	123	44	18	37	148

Business support

Rochdale businesses have similar behaviour to those across Greater Manchester in terms of use of business support and mentoring. There are also no significant differences within Rochdale by size or sector.

Figure 56: Key indicators of business support

	No. of employees					Grouped sector	
	Total	Rochdale	1-10	11-49	50+	Prod- uction	Services
Use of business support							
Used any to start up business (where started up in last 3 years)	60%	50%	50%	0%	0%	33%	55%
Used any in the last 12 months	50%	55%	55%	64%	33%	58%	55%
Business mentoring							
Used a business mentor in the last 12 months	10%	7%	7%	8%	3%	12%	6%
Currently acting as a business mentor	4%	6%	5%	12%	3%	3%	7%
Unweighted bases	1224	185	123	44	18	37	148

Export, trade and connectivity

Just under one in five Rochdale businesses has export, import or other international links, a similar proportion to that across the whole of Greater Manchester.

Figure 57: Key indicators of export, trade and connectivity

	No. of employees					Grouped sector	
	Total	Rochdale	1-10	11-49	50+	Prod- uction	Services
Trades internationally							
Has export, import and other international links	19%	17%	14%	21%	41%	19%	16%
Unweighted bases	1224	185	123	44	18	37	148

Innovation and technology

A slightly higher (though not significantly so) proportion of Rochdale businesses have undertaken innovation activities in the last three years.

Figure 58: Key indicators of innovation and technology

	No. of employees					Grouped sector	
	Total	Rochdale	1-10	11-49	50+	Production	Services
Innovation activities							
Any innovation activities undertaken	74%	78%	75%	84%	100%	68%	81%
Unweighted bases	1224	185	123	44	18	37	148

Recruitment and skills

More than eight in ten Rochdale businesses have undertaken training in the last 12 months, particularly internal training. This is similar to the figures for Greater Manchester.

Medium sized businesses and those in the services sectors are more likely to undertake training than smaller businesses or those in production/construction sectors.

Figure 59: Key indicators of recruitment and skills

	No. of employees					Grouped sector	
	Total	Rochdale	1-10	11-49	50+	Production	Services
Training in the last 12 months							
Internal training	71%	75%	69%	92%	98%	56%	79%
External training	39%	44%	38%	63%	68%	41%	45%
Any training	79%	85%	81%	96%	100%	74%	87%
Unweighted bases	1224	185	123	44	18	37	148

Appendix 6: Survey Sample

Figure 60: Population, interviews and weighting of data

	Population (n)	Population %	No. of interviews	No. of cases (weighted)
Size (employees)				
1-10	53,825	77%	748	948
11-49	12,614	18%	301	220
50+	3,657	5%	175	55
Total	70,096	100%	1224	1224
Sector				
DE - Utilities	335	7%	5	3
C - Manufacturing	5,120	0%	110	90
F - Construction	6,515	9%	85	114
G - Wholesale and retail trade	13,052	19%	263	230
H - Transportation and storage	1,854	3%	39	31
I - Accommodation and food services	4,575	7%	133	80
J - Information and communications	3,082	4%	54	54
KL - Finance and real estate	3,505	5%	62	61
M - Professional, scientific and technical activities	10,014	14%	153	174
N-S - Administrative, education, human health, arts and other activities	22,044	31%	320	388
Total	70,096	100%	1,224	1,224
District				
Manchester	13,765	20%	1,224	242
Trafford	8,335	12%	185	85
Rochdale	4,865	7%	186	143
Remainder in other Greater Manchester districts	43,131	62%	352	755
Total for Greater Manchester	70,096	100%	1,224	1,224

Appendix 7: Questionnaire

GREATER MANCHESTER BUSINESS SURVEY 2013

ASK TO SPEAK TO SENIOR PERSON IN DAY TO DAY CONTROL OF THE BUSINESS

Good morning/afternoon. My name is xxxx and I'm calling from xxxx, an independent research organisation. We are phoning on behalf of The Business Growth Hub **[and CATI INSERT: PARTNER WHERE BASED IN MANCHESTER, ROCHDALE OR TRAFFORD]**. We are carrying out a business survey across Greater Manchester to identify how we can improve services for business.

Note to interviewer: The Business Growth Hub is for businesses in Manchester and the wider North West that have the potential, ambition and commitment to grow. The Hub can help, whether you need access to finance, want to expand your markets, develop new products and services, build a new business network, develop leadership skills, explore marketing opportunities, improve productivity or invent the next life-changing product or service.

Can I just check that you are an appropriate senior person at this site to discuss this survey within the organisation? IF NECESSARY: You should be able to answer detailed questions about the organisation and its operations, and provide information on recent and future trends in employment and trading activity.

- 1 Yes – continue
- 2 No – ask who is and attempt to contact this individual instead

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 25 minutes depending on your answers.

Would it be convenient to conduct the interview now?

At the end of the survey I will be able to offer you the opportunity to request a summary report of the findings of the survey when it is completed.

Yes – continue	1	Continue
Definite appointment	2	<i>Make definite appointment / soft call back</i>
Soft appointment	3	
Refusal – no reason given	4	<i>Close</i>
Refusal – company policy	5	
Refusal – taken part in other survey recently	6	
Nobody at site able to answer the questions	7	
Not available in deadline	8	
Duplicate – already called about this survey	9	

ADD IF NECESSARY

- Your cooperation will ensure that the views expressed are representative of all employers
- All information collected will be treated in the strictest confidence. Responses will not be attributed to any individual or company
- We work strictly within the Market Research Society Code of Conduct
- Contact at BMG Research is Linda Balodis, Account Manager, on 0121 3336006
- Contact at SEE MATRIX
- Businesses have been randomly chosen from the FAME database.

MERGE FROM DATABASE:

Name of business:**Telephone number (include STD):****Address:**

.....

.....

Postcode (essential):**Area code for sample grid:**

	Database area	Local Authority	Contact
1	Bolton	Bolton Council	Matt Day (Business Growth Hub): 0161 237 4033
2	Bury	Bury Council	Matt Day (Business Growth Hub): 0161 237 4033
3	Oldham	Oldham Council	Matt Day (Business Growth Hub): 0161 237 4033
4	Rochdale	Rochdale Council	Susan Ayres (Rochdale Council) 01706 925636
5	Stockport	Stockport Council	Matt Day (Business Growth Hub): 0161 237 4033
6	Tameside	Tameside Council	Matt Day (Business Growth Hub): 0161 237 4033
7	Trafford	Trafford Council	Stephen James (Trafford Council): 0161 912 4330
8	Wigan	Wigan Council	Matt Day (Business Growth Hub): 0161 237 4033
9	Manchester	Manchester City Council	Teun van Rooij: 0161 234 1534
10	Salford	Salford City Council	Matt Day (Business Growth Hub): 0161 237 4033

RECORD RESPONDENT NAME:**Q1.** What is your position within the business? PROMPT AS NECESSARY AND CODE ONE ONLY

- 1 Owner
- 2 Partner
- 3 MD/CEO (Managing director/Chief Executive Officer)
- 4 Company Secretary
- 5 Most senior onsite role (SPECIFY)
- 6 Finance Director
- 7 Senior Executive
- 8 Other (SPECIFY)

SECTION 1: ABOUT YOUR BUSINESS

Q2. Can I just check, are you a private business, a public sector organisation or a voluntary/non profit-making business?

- 1 A private business - GO TO Q3a
- 2 A public sector organisation - THANK AND CLOSE SAYING: Thank you for your help but we are only interviewing private businesses
- 3 A voluntary/non profit-making organisation - GO TO Q3a

Q3a. How many people does your business employ at this site? Please exclude proprietors, partners and anyone who does not receive a salary direct from the payroll? PROBE FOR BEST ESTIMATE. WRITE IN AND CODE BELOW

- INCLUDE FULL AND PART TIME
- INCLUDE TEMPORARIES/CASUALS, BUT NOT AGENCY STAFF
- EXCLUDE SELF-EMPLOYED
- EXCLUDE OWNERS/PARTNERS AND OTHER DIRECTORS

_____ Staff

IF UNSURE READ OUT BANDS

- | | | |
|---|------------|-----------------|
| 1 | 0 | THANK AND CLOSE |
| 2 | 1–10 | |
| 3 | 11–49 | |
| 4 | 50–199 | |
| 5 | 200–249 | |
| 6 | 250+ | |
| 7 | Don't know | |

Q3b. What percentage of your workforce at this site is ...? READ OUT. PROMPT FOR AN APPROXIMATION AND WRITE IN

Full time			
Part time			

SHOULD ADD TO 100%

Q4a. I have [READ OUT SIC DESCRIPTION FROM SAMPLE] as a general classification for your business. Does this sound right ?

- 1 Yes
- 2 No

WHERE NO (Q4a/2):**Q4b.** What is your main business activity at this site? PROBE AS NECESSARY:

- What is the main product or service of this organisation?
- What exactly is made or done at this organisation?
- What material or machinery does that involve using?

PROBE FULLY. RECORD DETAILS AND CODE BELOW

CODE TO SIC 2007 4 DIGIT**ASK ALL:****Q5.** What is the legal status of your organisation? READ OUT AS NECESSARY. ALLOW MULTICODE ONLY IF 'OTHER' MENTIONED

INTERVIEWER NOTE: IF BUSINESS NAME CONTAINS 'LTD' OR 'LIMITED' THEY ARE USUALLY A LTD. COMPANY (CODE 2). IF 'PRIVATE LIMITED COMPANY' MENTIONED, CHECK WHETHER LIMITED BY SHARES OR BY GUARANTEE. FOR OTHERS RECORD ALL INFORMATION VERBATIM TO ESTABLISH OWNERSHIP. N.B. "CHARITY" IS NOT A LEGAL STATUS)

1	Sole proprietorship
2	Private limited company, limited by shares (LTD.)
3	Public Ltd Company (PLC)
4	Partnership
5	Limited liability partnership
6	Private company limited by guarantee
7	Community Interest Company (CIC, limited by guarantee or shares)
8	Friendly Society
9	A Co-operative
10	Industrial and Provident Society
11	Private Unlimited Company
12	Foreign Company
13	A trust
14	An unincorporated association
15	Other (SPECIFY)
16	Don't know
17	Refused

Q6a. Does the business just operate from this site or does it have other sites? IF HAS MORE THAN ONE SITE ASK: Is this site a branch/subsidiary or is it the Head Office/HQ? CODE ONE ONLY

- 1 Single site
- 2 This site is a branch/subsidiary
- 3 This site is HQ
- 4 Don't know
- 5 Refused

WHERE BRANCH/SUBSIDIARY (Q6a/2):

Q6b. Where is your head office (or holding company office) located? PROMPT AS NECESSARY. CODE ONE ONLY

- 1 Inside Greater Manchester
- 2 Outside Greater Manchester, but inside the Northwest
- 3 In the UK, but outside the Northwest
- 4 Europe
- 5 US
- 6 Rest of World
- 7 Don't know

ASK ALL:

Q7. How many years has your business been trading overall? PROBE FOR AN ANSWER AND CODE ONE ONLY

- 1 Less than 12 months
- 2 1 up to 2 years
- 3 over 2 up to 3 years
- 4 over 3 up to 5 years
- 5 6 to 10 years
- 6 11 to 20 years
- 7 Over 20 years
- 8 Don't know

Q8a. Over the last 12 months has the number of staff employed at that site ...? READ OUT AND CODE ONE ONLY

1	INCREASED
2	DECREASED
3	STAYED THE SAME
4	DON'T KNOW

WHERE INCREASED/DECREASED (Q9/1 OR 2):

Q8b. By approximately what percentage? PROMPT FOR AN APPROXIMATION AND CODE BELOW

1	Up to 10%
2	At least 10% but less than 20%
3	At least 20% but less than 30%
4	At least 30% but less than 40%
5	At least 40% but less than 50%
6	50% or more
7	Don't know

ASK ALL:

Q9a. And over the next 12 months, do you expect the number of staff employed at that site to ...?
READ OUT AND CODE ONE ONLY

1	INCREASE
2	DECREASE
3	STAY THE SAME
4	DON'T KNOW

WHERE INCREASE/DECREASE (Q9a/1 OR 2):

Q9b. By approximately what percentage? PROMPT FOR AN APPROXIMATION AND CODE BELOW

1	Up to 10%
2	At least 10% but less than 20%
3	At least 20% but less than 30%
4	At least 30% but less than 40%
5	At least 40% but less than 50%
6	50% or more
7	Don't know

WHERE INCREASE (Q9a/1):

Q9c. In to which of the following occupations do you think your business will recruit staff in the next 12 months? READ OUT AND CODE ALL THAT APPLY

- 1 Professional & managerial (Managers, Directors and Senior Officials)
- 2 Clerical (Administrative and secretarial occupations)
- 3 Technical/craft skills (Machinists and craft occupations)
- 4 Semi-skilled
- 5 Unskilled
- 99 Don't know

ASK ALL:

Q10a. Over the last 12 months, has the turnover of your business ...? READ OUT AND CODE ONE ONLY

1	INCREASED
2	DECREASED
3	STAYED THE SAME
4	DON'T KNOW

WHERE INCREASED/DECREASED (Q10a/1 OR 2):

Q10b. By approximately what percentage ? PROMPT FOR AN APPROXIMATION AND CODE BELOW

1	UP TO 10%
2	BETWEEN 10 AND 20%
3	BETWEEN 20 AND 30%
4	BETWEEN 30 AND 40%
5	BETWEEN 40 AND 50%
6	MORE THAN 50%
7	DON'T KNOW

ASK ALL

Q10c. And over the next 12 months, do you expect your turnover to ...? READ OUT AND CODE ONE ONLY

1	INCREASE
2	DECREASE
3	STAYED THE SAME
4	DON'T KNOW

WHERE INCREASE/DECREASE (Q10c/1 OR 2):

Q10d. By approximately what percentage ? PROMPT FOR AN APPROXIMATION AND CODE BELOW

1	Up to 10%
2	At least 10% but less than 20%
3	At least 20% but less than 30%
4	At least 30% but less than 40%
5	At least 40% but less than 50%
6	50% or more
7	Don't know

SECTION 2: LOCAL AREA

ASK ALL:

Q11. Could you please rate the following aspects of your local area on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied? READ OUT AND CODE ONE FOR EACH.
[ROTATE]

		1 – Very dissati sfi ed	2	3	4	5 – Very satisfi ed	6 – DON'T KNOW
A	Business rate costs	1	2	3	4	5	6
B	Quality of premises	1	2	3	4	5	6
C	Affordability of premises	1	2	3	4	5	6
D	Availability of parking	1	2	3	4	5	6
E	Crime and anti-social behaviour	1	2	3	4	5	6
F	Access to Public transport, i.e. Bus/Train/Metro	1	2	3	4	5	6
G	Road transport access	1	2	3	4	5	6
H	Image of area	1	2	3	4	5	6
I	Broadband speed	1	2	3	4	5	6

ASK TRAFFORD COMPANIES (DATABASE FLAG):

Q12a. What additional Council support would you like to see provided for local businesses? WRITE IN VERBATIM PROBING FULLY

Q12b. What improvements would you like to see to Trafford Park? WRITE IN VERBATIM PROBING FULLY

ASK TRAFFORD PARK COMPANIES (DATABASE FLAG):

Q12c. Would you be interested in joining the Trafford Park Business Network? CODE ONE ONLY
By agreeing to be contacted you allow us to pass your email address to Trafford Council. All of your survey answers will remain anonymous and your details / email address will not be shared with any third parties. CODE ONE ONLY

- 1 Yes
- 2 No
- 3 Don't know

ASK ALL

Q13. Have you had any major business disruptions in the last 12 months caused by one or more of the following issues? READ OUT AND CODE ALL THAT APPLY

- 1 Utilities interruption
- 2 Loss of ICT
- 3 Loss of data
- 4 Security breach/cyber attack
- 5 Key members of staff leaving
- 6 Unexpected & prolonged absence of key staff
- 7 Unforeseen closure of your premises
- 8 Supplier failure
- 9 Product recall
- 10 Flooding
- 11 Severe weather conditions
- 12 Transport & congestion
- 95 Other Please specify _____
- 96 No major business interruption
- 97 Don't know/refused

Q14. Do you have plans in place to ensure key business functions can continue despite serious disruptions, sometimes called a Business Continuity Plan? READ OUT AND CODE ONE ONLY

- 1 Plans in place and tested
- 2 Plans in place but not tested
- 3 No plans in place
- 4 Have not considered this type of planning
- 5 Don't know

Q15. Are you considering relocating your business?

- 1 Yes
- 2 No
- 3 Don't know

WHERE CONSIDERING RELOCATION (Q15/1):

Q15a. What are your main reasons for considering relocating? PROBE FULLY AND CODE BELOW

1	Current premises too small
2	Current premises too big
3	Cost of current premises too high
4	Be closer to existing customers
5	Gain access to new markets
6	Gain access to skilled and affordable labour
7	To be closer to suppliers
8	To be closer to companies in my industry/sector
9	Benefit from better transport links
10	Reduce impact of crime and anti-social behaviour
11	Lifestyle/personal reasons
95	Other (SPECIFY)
97	Don't know

Q15b. Where are you considering moving to? PROMPT AS NECESSARY. CODE ONE ONLY

- 1 Within current local authority area
- 2 Elsewhere in Greater Manchester (SPECIFY)_____
- 3 Elsewhere in the Northwest (SPECIFY)_____
- 4 Elsewhere in the UK (outside the Northwest) (SPECIFY)_____
- 5 Outside UK (SPECIFY)_____
- 6 Don't know

ASK ALL:

Q16. We are looking to understand how businesses support their local economy and community. For each of the following statements can you tell me if, it currently applies to your business, it is something you are likely to consider doing in future, or it is *not* something you are likely to consider in the future? READ OUT (INCLUDING EXPLANATIONS IF REQUIRED) AND CODE ONE ONLY FOR EACH

		Currently applies	Likely to consider in the future	Not likely to consider in the future	DO NOT READ OUT: Don't know
A	We support local schools in terms of hosting industry/careers talks, providing work experience, providing support for governors/management and supporting curriculum activities such as reading / literacy / enterprise	1	2	3	4
B	We support local community groups/charities, e.g. sponsoring activities; providing staff expertise	1	2	3	4
C	We help local residents get back into work e.g. providing work placements, volunteering opportunities or help with CV preparation or mock interviews	1	2	3	4
D	We promote local trading e.g. where possible use suppliers within a 5 mile radius first	1	2	3	4
E	We consider the environmental impact of our buying decisions	1	2	3	4
F	We actively reduce company waste	1	2	3	4
G	We actively try to improve our energy efficiency	1	2	3	4
H	We actively try to reduce work-related car emissions	1	2	3	4

SECTION 3: IDENTIFYING DRIVERS & BARRIERS TO GROWTH

- Q17.** Which of the following do you feel are the three main drivers of growth in your business?
READ OUT AND CODE UP TO 3. **[ROTATE]**

1	Access to markets and sales opportunities
2	The products and services your company provides
3	The finances of your business
4	Levels of productivity
5	Your approach to business strategy and planning
6	Your workforce and skills
7	Your business location and premises
8	Access to transport and connectivity
95	Other (SPECIFY)
97	Don't know

- Q18.** What do you think are the three main barriers that might prevent your business from growing?
READ OUT AND CODE UP TO 3. **[ROTATE]**

1	Access to markets and sales opportunities
2	The products and services your company provides
3	Need for finance for your business
4	Low levels of productivity
5	Inadequate business strategy or planning
6	Lack of staff or skills
7	Poor business location and premises
8	Access to transport and connectivity
95	Other (SPECIFY)
97	Don't know

Q19 DELETED

Q20. Have you sought finance for your business in the last 12 months? CODE ONE ONLY

- 1 Yes
- 2 No
- 3 Don't know

WHERE SOUGHT FINANCE (Q20/1):

Q21. How much funding was required? PROMPT FOR AN APPROXIMATION AND WRITE IN AMOUNT. IF UNSURE PROMPT WITH BANDS BELOW AND CODE

--	--	--	--	--	--	--	--	--	--

Don't know X
Refused Y

TO COMPLETE IF FIGURE GIVEN AT Q21. OTHERS GO TO Q22.

INTERVIEWERS TO RE-ENTER VALUE INTO RANGE. DO NOT ASK. SINGLE CODE ONLY

£0–£2,999	1
£3,000–9,999	2
£10,000–£49,999	3
£50,000–£99,999	4
£100,000–£499,999	5
£500,000–£999,999	6
£1–£4.99M	7
£5M–£9.99M	8
£10M+	9

ALL SEEKING FINANCE (Q20/1):

Q22. Why did you apply for finance? DO NOT READ OUT. PROBE FULLY. CODE ALL THAT APPLY

- 1 To start the business
- 2 Working capital, cashflow
- 3 Business expansion/growth
- 4 Capital equipment or vehicles
- 5 Improving buildings
- 6 Buying land or buildings
- 7 Marketing
- 8 Research & Development
- 9 Management buy out
- 10 Training/Staff Development
- 11 Buying another business
- 95 Other (SPECIFY)_____
- 97 Don't know/refused

Q23. Did you experience any difficulty arranging finance?

- 1 Yes
- 2 No
- 3 Don't know

WHERE HAD DIFFICULTY (Q23/1):

Q24. What difficulties did you experience in trying to arrange this finance? DO NOT READ OUT. PROBE FULLY. CODE ALL THAT APPLY

- 1 Did not meet criteria
- 2 Inadequate business plans
- 3 Business sector considered too risky to investment
- 4 Poor business credit history
- 5 Insufficient/no security
- 6 No credit history/not been in business long enough
- 7 Applied for too much
- 8 Business too small/too new
- 9 Company has rejected the terms of finance offered
- 10 Finance unavailable
- 95 Other (SPECIFY).....
- 96 Don't know/refused

WHERE BUSINESS TRADING UP TO 3 YEARS (Q7/1-3):

Q25. In which of the following ways did you access finance to start-up your business? READ OUT AND CODE ALL THAT APPLY

ASK ALL:

Q26. In which of the following ways would you normally access finance to support business growth? READ OUT AND CODE ALL THAT APPLY ...and

Q27. Which of these might you use in the future to access finance to support business growth? READ OUT AND CODE ALL THAT APPLY

	Q25 To start up the business	Q26 To support business growth	Q27 To support business growth in the future
Banks/debt	1	1	1
Internal capital	2	2	2
External capital	3	3	3
Venture capital	4	4	4
Friends and family	5	5	5
Business angels	6	6	6
Local and central government grants/loans/funding schemes	7	7	7
Other SPECIFY	95	95	95
No finance sought	96	96	96
Don't know/refused	97	97	97

SECTION 4: BUSINESS SUPPORT

WHERE BUSINESS TRADING UP TO 3 YEARS (Q8/1-3):

Q28. Did you use any of the following professional support and advice organisations to start up your business? READ OUT AND CODE ALL THAT APPLY

ASK ALL:

Q29. Have you used any of the following professional support and advice organisations - for your business - other than for accounting or regulatory purposes in the last 12 months? READ OUT AND CODE ALL THAT APPLY

Q30. DELETED

		Q28 Used to start up business	Q29 Used in last 12 months
A	Business Link.gov helpline / website - "The Business finance and support finder"	1	1
B	Greater Manchester Chamber of Commerce	2	2
C	Greater Manchester Business Growth Hub	3	3
D	Bank	4	4
E	UK Trade and Investment Service (UKTI)	5	5
F	The Government's Growth Accelerator	6	6
G	Manufacturing Advisory Service (MAS)	7	7
H	MIDAS – Invest in Manchester	8	8
I	Universities	9	9
J	Accountants/solicitors [over and beyond for bookkeeping/auditing or statutory/regulatory purposes]	10	10
K	Trade Association/employer organisations/business networks	11	11
L	Local Authority	12	12
M	Business Consultancy / Consultants	13	13
N	TfGM (Travel for Greater Manchester) Travel Advice for Business Services	14	14
O	Support for Social Enterprise	15	15
P	Other (SPECIFY)	95	95
	Haven't used/plan to use any	96	96
	Don't know	97	97

Q31 DELETED

Q32 DELETED

Q33. How much did you pay, if at all? WRITE IN AMOUNT

£	
Nothing	96
Don't know	97

TO COMPLETE IF FIGURE GIVEN AT Q33. OTHERS GO TO Q34.

INTERVIEWERS TO RE-ENTER VALUE INTO RANGE. DO NOT ASK. SINGLE CODE ONLY

£1–£99	1
£100–£999	2
£1,000–£4,999	3
£5,000–£9,999	4
£10,000+	5

IF BUSINESS GROWTH HUB MENTIONED (Q28/3, Q29/3 OR Q30/3):**Q34.** How did you first hear about the Business Growth Hub? DO NOT PROMPT. CODE ALL THAT APPLY

1	Electronic news-summary updates / email newsletters
2	Local press
3	Accountants referral
4	National press
5	Trade body or Chamber of Commerce communication
6	Legal advisor
7	TV or radio
8	Colleagues referral
95	Other (SPECIFY)
97	Don't know

Q35. What, if any, Business Growth Hub services have you used? DO NOT PROMPT. CODE ALL THAT APPLY**WHERE USED BUSINESS GROWTH HUB SERVICES (Q35/1-95)****Q36.** What Business Growth Hub services did you find most beneficial? DO NOT PROMPT. CODE ALL THAT APPLY

	Q35 Services used	Q36 Most beneficial
Mentoring	1	1
Growth advice	2	2
Start-up support	3	3
Digital Growth support	4	4
Conferences, Lunches and Events	5	5
Mentoring	6	6
Manufacturing Advisory Service (MAS)	7	7
Access to Finance (A2F)	8	8
UK Trade and Industry (UKTI)	9	9
ENWORKS (Environment Works) – environmental services support for businesses	10	10
Other (SPECIFY)	95	95
Don't know	97	97

IF FOUND ANY BUSINESS GROWTH HUB SERVICES BENEFICIAL (Q36/1-95)

Q37. Would you have taken advice (elsewhere) if the service wasn't available at the Business Growth Hub? CODE ONE ONLY

- 1 Yes
- 2 No
- 3 Don't know

IF YES (Q37/1)

Q38. Where would you have got the support from? DO NOT PROMPT. CODE ALL THAT APPLY

Business Link.gov helpline / website - "The Business finance and support finder"	1
Greater Manchester Chamber of Commerce	2
Bank	3
UK Trade and Investment Service (UKTI)	4
The Government's Growth Accelerator	5
Manufacturing Advisory Service (MAS)	6
MIDAS – Invest in Manchester	7
Universities	8
Accountants/solicitors [over and beyond for bookkeeping/auditing or statutory/regulatory purposes]	9
Trade Association/employer organisations/business networks	10
Local Authority	11
Business Consultancy / Consultants	12
TfGM (Travel for Greater Manchester) Travel Advice for Business Services	14
Other (SPECIFY)	95
Don't know	97

WHERE USED SUPPORT/ADVICE IN THE LAST 12 MONTHS (Q29/1-95)

Q39. Have you had any difficulties getting the advice, information or support you needed in the last 12 months?

- 1 Yes
- 2 No
- 3 Don't know

WHERE HAD DIFFICULTIES (Q39/1):

Q40. Which of the following reflect the difficulties you have experienced in seeking support and advice for your business in the last 12 months? READ OUT AND CODE ALL THAT APPLY

- 1 Had difficulty finding out where to obtain the right support/advice
- 2 Had difficulty determining the support and advice required
- 3 Advice/support available was too expensive
- 4 Found it difficult to find the time to seek/access external advice
- 5 Other (SPECIFY)

WHERE NOT USED SUPPORT/ADVICE IN THE LAST 12 MONTHS (Q29/96):

Q41. Why haven't you used support or advice for your business in the last 12 months? DO NOT READ OUT. PROBE FULLY. CODE ALL THAT APPLY

- 1 Had no need of support or advice
- 2 Have doubts about the benefit or value of obtaining advice
- 3 Do not know where to find the right advice
- 4 Expense of the advice/support available
- 5 Do not have the time to seek/access external advice
- 6 Had difficulty determining the support and advice required
- 7 Have sufficient in-house expertise
- 95 Other (SPECIFY)_____
- 97 Don't know

WHERE USED SUPPORT/ADVICE IN THE LAST 12 MONTHS (Q29/1-95)

Q42. In which of the following areas have you **sought business support** and advice in the last 12 months? READ OUT AND CODE ALL THAT APPLY. [ROTATE]

ASK ALL:

Q43. In which of these areas are you likely to **look for support** and advice in the foreseeable future? READ OUT AND CODE ONE FOR EACH. **[ROTATE]**

WHERE LIKELY TO USE SUPPORT/ADVICE IN THE FUTURE (Q43/1-95):

Q44 Would you be willing to be re-contacted regarding these services? By agreeing to be contacted you allow us to pass your email address to the Business Growth Hub [and **CATI INSERT: LOCAL AUTHORITY**]. All of your survey answers will remain anonymous and your details / email address will not be shared with any third parties. READ OUT AND CODE ALL THAT APPLY

	Q42 Used in last 12 months	Q43 Use in foreseeable future	Q44 Would like re- contact
Accessing finance, including grants & subsidies	1	1	1
Increasing sales through marketing	2	2	2
Leadership and management skills to grow your business	3	3	3
Expanding the workforce, recruitment/job creation, including recruitment of apprenticeships	4	4	4
Exploiting digital services and E-Commerce	5	5	5
Using broadband or digital technology	6	6	6
Exporting/overseas trade	7	7	7
Workforce skills and training	8	8	8
Availability of new premises or expanding your own premises	9	9	9
Help with innovation or research & development	10	10	10
General business growth	11	11	11
Business continuity (minimising disruption to your business)	12	12	12
Sustainable travel, e.g. support for work-travel planning	13	13	13
Reducing energy, material, water & waste costs	14	14	14
Business networking	15	15	15
Supply chains	16	16	16
Corporate Social Responsibility – finding out how you can support local schools	17	17	17
Public sector contract opportunities	19	19	198
Other (SPECIFY)	95	95	95
None	96	96	96
Don't know	97	97	97

WHERE NOT USED SUPPORT/ADVICE IN THE LAST 12 MONTHS AND NOT INTENDING TO IN THE FUTURE (Q42/96 AND Q43/96):

[ASK RANDOM ONE THIRD OF FILTERED SAMPLE EACH OF THE FOLLOWING QUESTIONS]

Q45a Would you be interested in using business advice in any of the areas if the cost of using business advice and support was subsidised by 50%? CODE ONE ONLY

- 1 Yes
- 2 No
- 3 Don't know

Q45b Would you be interested in using business advice in any of the areas if you only have to pay half the cost? CODE ONE ONLY

- 1 Yes
- 2 No
- 3 Don't know

Q45c Would you be interested in using business support in any of the areas if you are given matched funding of up to £2,000? CODE ONE ONLY

- 4 Yes
- 5 No
- 6 Don't know

ASK ALL:

Q46. Have you used a business mentor in the last 12 months – somebody with business expertise who supports you in your personal and/or business development? CODE ONE ONLY

- 1 Yes
- 2 No
- 3 Don't know

WHERE USED A BUSINESS MENTOR (Q46/1):

Q47. How has business mentoring helped your business? DO NOT PROMPT. PROBE FULLY AND CODE ALL THAT APPLY

- 1 Developed business plans and strategy
- 2 Increased sales or profits
- 3 Enhanced leadership and management skills
- 4 Developed new products, services or processes
- 5 Helped to obtain finance
- 6 Supported workforce development / personal development
- 7 Helped to increase staff numbers
- 8 Improved position in the market place or supply chains
- 95 Other (SPECIFY)_____
- 97 Don't know

ASK ALL:

Q48. Are you currently acting as or considering becoming a business mentor for another business or entrepreneur?

- 1 Yes – currently a mentor
- 2 Yes – would like to become a mentor
- 3 No
- 4 Don't know

SECTION 5: EXPORT, TRADE AND CONNECTIVITY

Q49. Do you currently have any operations that deal with international markets? PROBE FOR PLANS AND CODE ONE ONLY

- 1 Yes
- 2 No, but we are planning to do so
- 3 No, and we have no plans to so
- 4 Don't know

WHERE DEAL WITH INTERNATIONAL MARKETS (Q49/1):

Q50. Do you have any of the following relationships with overseas companies? READ OUT AND CODE ALL THAT APPLY

- 1 Export trade
- 2 Import trade
- 3 Other business relationship, e.g. good contact links / networks / parent & subsidiary company links

WHERE IMPORT/EXPORT (Q50/1 OR 2):

Q51. Which of the following locations do you have trade links with? READ OUT AND CODE ALL THAT APPLY

- 1 Europe, SPECIFY MAIN COUNTRY
- 2 North America, SPECIFY MAIN COUNTRY
- 3 China
- 4 India
- 5 Other Asia-Pacific, SPECIFY MAIN COUNTRY
- 6 Latin America, SPECIFY MAIN COUNTRY
- 7 Middle East, SPECIFY MAIN COUNTRY
- 8 Africa, SPECIFY MAIN COUNTRY

ASK ALL:

Q52. Which of the following BRIC (Brazil, Russia, India & China), Middle East, or other emerging economy countries are you actively looking to develop business links with? PROMPT IF NECESSARY AND CODE ONE ONLY

- 1 Brazil
- 2 Russia
- 3 India
- 4 China
- 5 Middle East
- 6 Other (SPECIFY)_____
- 96 None
- 97 Don't know

Q53-Q56. DELETED

SECTION 6: INNOVATION & TECHNOLOGY**ASK ALL:**

Q57. Which of the following innovation activities has your business engaged in during the last three years? READ OUT AND PROVIDE EXAMPLES IF NECESSARY. CODE ALL THAT APPLY. **[ROTATE]**

Q58. Which of the following innovation activities might your business engage in during the next three years? READ OUT AND PROVIDE EXAMPLES IF NECESSARY. CODE ALL THAT APPLY. **[ROTATE]**

	Q57 Last 3 years	Q58 Might do in future
Undertaking in-house research & development? e.g. work undertaken within your enterprise to increase the stock of knowledge to devise new and improved goods, services and processes	1	1
Buying in addition external research & development / consultancy? e.g. undertaken externally by consultants, Universities, etc	2	2
Investing in new machinery/plant, ICT equipment, software? e.g. totally new or improved existing equipment	3	3
Training which supports the development or introduction of new products, services or business and process improvement? e.g. not basic health and safety training	4	4
Implementing major changes in business structure or processes? e.g. adoption of advanced management concepts, outsourcing, supply chain integration, changes in marketing/branding techniques	5	5
None of the above	6	6

Q59. Have any of the following factors acted as a constraint to innovation in your business? READ OUT AND CODE ALL THAT APPLY. ROTATE

- 1 The cost of new product or service development
- 2 Technical or scientific risk – i.e. the likely outcome of the investment is unknown
- 3 Access to suitable facilities or technology
- 4 Lack of qualified personnel
- 5 Difficulty in finding external specialist expertise
- 6 Lack of finance
- 7 Lack of market knowledge
- 8 Cost of intellectual property protection
- 9 Knowledge of materials or processes
- 95 Other (SPECIFY) _____
- 96 None
- 97 Don't know

Q60. Have you considered getting a faster or more reliable connection to the Internet? CODE ONE ONLY

- 1 Yes, currently organising
- 2 Yes, but not yet arranged
- 3 Yes, but too expensive
- 4 Yes, but not available at my premises
- 5 No
- 6 Not connected to the Internet

Q61. Have any of the following acted as a barrier to you adopting digital technologies, including broadband and cloud services to improve your business? READ OUT AND CODE ALL THAT APPLY.

- 1 Lack of knowledge – e.g. about technology available, the business benefits, or risks involved
- 2 Lack of skills – within the firm to implement new technology in the short-term
- 3 Lack of investment – e.g. finance available to invest in new staff/training required, new hardware, software, or connectivity
- 4 Speeds of local connectivity not sufficient
- 5 Other (SPECIFY)_____
- 6 No/none

SECTION 7: RECRUITMENT & SKILLS**ASK ALL:****Q62.** Have you provided staff training in the last 12 months? PROMPT AND CODE

Yes, provided internally by own staff (Internal Training)	1
Yes, by an external training provider (External Training)	2
No training provided, but do have a training plan/budget	3
No training provided, and do not have a training plan/budget in place	4
Don't know/refused	99

Q63. What proportion of your positions at that site require degree level skills (or higher)?
PROMPT FOR AN APPROXIMATION AND WRITE IN

			%
--	--	--	---

0 NONE
 997 DON'T KNOW
 998 REFUSED

Q64. Do you currently employ any Apprentices ... ? READ OUT AND CODE ALL THAT APPLY**ASK FOR EACH WHERE DO NOT CURRENTLY EMPLOY:****Q65.** Are you likely to employ any Apprentices (CATI insert) in the future ? CODE ONE FOR EACH AGE GROUP

	Q64 Currently employ	Q65 Likely to do in the future	Not likely to do in the future	Don't know
Aged 16 to 18	1	1	2	3
Aged 19 to 24	2	1	2	3
Aged 25+	3	1	2	3

Q66. DELETED**ASK ALL:****Q67.** How do you typically recruit for new staff? DO NOT READ OUT. PROBE FULLY AND CODE ALL THAT APPLY

- 1 Word of mouth
- 2 Jobcentre / Universal Jobmatch online
- 3 Recruitment firms
- 4 Recruitment websites
- 5 Local press
- 6 Other advertising (online/regional/national press)
- 95 Other (SPECIFY)_____
- 96 Don't know

Q68. DELETED

Q69. Do you have any hard-to-fill vacancies?

- 1 Yes
- 2 No
- 3 Don't know/refused

If Yes (Q69/1)

Q70. In which occupations are you experiencing recruitment difficulties? PROBE FULLY. WRITE IN UP TO THREE

	SOC 3 DIGITS

Q71. What are the main causes of having this/these hard to fill vacancies ? DO NOT READ OUT. CODE ALL THAT APPLY

- 1 Too much competition from other employers
- 2 Not enough people interested in doing this type of job
- 3 Poor perceptions of the sector / lack of prospects
- 4 Low number of applicants with the required skills / qualifications
- 5 Lack of work experience
- 6 Low number of applicants with the required work ethic
- 7 Difficulty finding the right recruitment agency
- 8 Poor transport links
- 95 Other (SPECIFY)_____
- 96 None
- 97 Don't know

WHERE LOW NUMBER WITH REQUIRED SKILLS (Q71/4):

Q72. Which particular skills have you found difficult to obtain in candidates? DO NOT READ OUT. PROBE FULLY. CODE ALL THAT APPLY

- 1 Communication skills
- 2 Numeracy skills
- 3 Customer handling skills
- 4 Team working skills
- 5 Foreign language skills
- 6 Problem solving skills
- 7 Management & leadership skills
- 8 Computer skills
- 9 Creative skills
- 10 Technical/specialist/craft skills
- 95 Other (SPECIFY)_____
- 96 None
- 97 Don't know

ASK ALL:

Q73. I want to talk about **skills gaps**, this is where staff are not fully proficient in their role to achieve your current business objectives. What types of skills are lacking in your organisation? **DO NOT READ OUT. PROBE FULLY. CODE ALL THAT APPLY**

- 1. Communication skills
- 2. Numeracy skills
- 3. Customer handling skills
- 4. Team working skills
- 5. Foreign language skills
- 6. Problem solving skills
- 7. Management & leadership skills
- 8. Computer skills
- 9. Creative skills
- 10. Technical/specialist/craft skills
- 95 Other (SPECIFY)_____
- 96 None
- 97 Don't know

Q74. DELETED

SECTION 8: TURNOVER AND CONTACT**ASK ALL:****I have a few final questions that will help us classify your business**

- Q75.** Approximately what was the turnover of your business at that site over the past year?
PROMPT FOR AN APPROXIMATION AND CODE BELOW

Less than £79,000 [VAT threshold]	1
£79,000–£250,000	2
£250,000–£0.5M	3
£0.5M–£1M	4
£1M–£5M	5
£5M–£10M	6
£10M–£25M	7
£25M+	8
Don't know	9
Unwilling to answer	10

ASK ALL

- Q76.** Would you be interested in receiving a summary of the results of this survey by email?

- 1 Yes
2 No

WHERE AGREE TO FURTHER CONTACT (Q12c/1, Q44/1-95 OR Q82):

- Q77.** Please can I have your direct line telephone number? DOUBLE INPUT OBTAIN DIRECT LINE TELEPHONE NUMBER RATHER THAN RECEPTION

1	
2	

- Q78.** Please can I also have your email address? DOUBLE INPUT OBTAIN PERSONAL EMAIL ADDRESS AT BUSINESS RATHER THAN GENERIC EMAIL ADDRESS

1	
2	

THANK AND CLOSE

Thank you for taking the time to help us with this survey.

Appendix 8: Statement of Compliance

Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2008) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012).

Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not be publish any part of these results without the written and informed consent of the client.

Ethical practice

BMG promotes ethical practice in research: We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

With more than 20 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the social public sector and the commercial private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most recent technologies and information systems to ensure that market and customer intelligence is widely shared.

