



Tunbridge Wells Business Network

COVID-19 survey

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Executive summary

Almost two thirds of businesses have been affected adversely by the COVID crisis. Businesses have adapted to working from home where possible, with varying degrees of effect on productivity. Almost two thirds of home workers believe they are at least or more productive, although 45% of business managers believe productivity is down. However, some home working is likely to become a permanent fixture, with over a quarter thinking their organisation will adopt more homeworking in future. Only 13% have found working from home more difficult than expected, and almost 4 out of five appreciate not having to commute. However, two thirds miss interaction with colleagues and many find working from home more distracting, or have problems with IT and internet connections.

Respondents are generally very supportive of local businesses and over half were supporting local businesses more than usual. Almost everyone will support local businesses at least as much after the lockdown ends.

Most people are gloomy about the prospects for economic recovery, with almost two thirds expecting only a slow recovery, and a fifth thinking it will continue to decline post lockdown. This is echoed by business managers/owners of whom over a quarter anticipate no improvement or further decline.



Background

The survey was conducted by Survey Mechanics on behalf of the Tunbridge Wells Business Network between 14 April and 28 May 2020.

299 people filled in at least part of the survey, with 224 completing it. Of these, 114 were involved in running a business. The intention of the survey was to measure the views of businesses and the general public with regard to their experiences of business and work during the lockdown, their attitudes to local businesses and their future intentions on these.

The sample was drawn from contacts of the Network's members and a sample of the general public provided by Survey Mechanics.

About Tunbridge Wells Business Network

The Tunbridge Wells Business Network is a group of professional business owners based around Tunbridge Wells. The members share experience and knowledge to support each other, learn best practice across a wide range of disciplines and generate business opportunities. For more information, please see: www.twbn.co.uk

About Survey Mechanics

Survey Mechanics is an accredited, specialist survey company based in East Sussex, which provides a unique online survey solution and research consulting services to other research companies, consulting companies, public sector bodies and businesses of all sizes from start-ups to major blue chips in many different sectors.

For more information, please see www.surveymechanics.com.

For more information about this survey, please contact Peter Martin at peter.martin@surveymechanics.com or +44 (0) 1580 200093.



Main findings

Sample details:

Respondents were based across the country, but with the biggest proportion (48%) being in the South East, reflecting their connections with members of the Tunbridge Wells Business Network. Business respondents represented business of all sizes, more or less in proportion with the size of businesses across the country, with 98% being SME (250 employees or fewer). 67% of businesses were based in the South East.

Effect on business:

30% of businesses are not operational during the pandemic crisis, and 32% are only partly operational. Only 15% of businesses reported that their turnover was unaffected by the crisis. Two thirds reported that their business was down considerably or had stopped entirely. 55% of those with staff had furloughed employees.

Borrowing:

23% had attempted to borrow to help sustain their businesses, 13% successfully. Others were still waiting to hear or had been unsuccessful. Only 9% found the lenders helpful and the process easy.

Working from home and productivity:

12% of the sample already worked from home, but an additional 35% are working from home. 2% are training from home. Apart from the phone (84%) and email (87%), people are staying in touch with their colleagues using WhatsApp (59%), Zoom(52%) and Microsoft Teams (44%).

Individuals' opinions are divided on whether productivity is up or down working from home, with 31% saying they are less productive, 35% saying no change and 28% saying more productive. 7% are not sure.

Business managers are less convinced about working from home, with 12% saying productivity is up, a third saying no change and 45% saying productivity is down. 9% are not sure.

28% believe their organisation will adopt more homeworking in future and that they will continue to work from home some or all of the time. Of those working from home currently, this increases considerably to 69%, suggesting that working from home has been perceived as being successful. For most (59%), working from home has been as easy as they expected, but 28% found it easier than expected. Only 13% thought it more difficult than expected.



Benefits and downsides of working from home:

Spending less time commuting was the most commonly cited benefit of working from home (by 79%), followed by savings on commuting costs (69%) and more time with family/partner (56%).

However, two thirds missed interaction with colleagues, and 40% found working from home more distracting. 31% had problems with IT and their broadband connections (12% mentioned lack of IT support) and over a quarter mentioned getting involved in domestic chores. 20% had a problem with having to deal with children and 18% with home schooling.

Local businesses

More than half the sample (54%) were supporting local businesses more since the outbreak. For 38% there was no change, while 7% were supporting local business less.

The most frequent reasons for supporting local businesses was that they need the support (76%), wanting to avoid crowded areas (57%) and wanting to support local workers (54%).

53% of respondents have found that they experience better service with local businesses, 44% better stock availability (though 14% found it worse), 33% better advice and 32% better availability of deliveries.

For those who didn't support local businesses, it was because they are closed (48%), can't deliver (29%) or are too crowded (10%).

41% will support local businesses more after the lockdown, and 52% about the same.

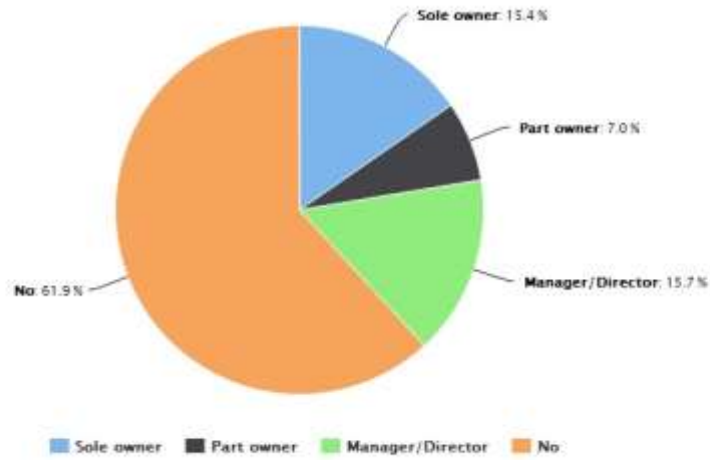
The economy

Almost two thirds (64%) expect the economy to recover only slowly after lockdown and only 9% think it will recover quickly. 20% believe will continue to shrink. 11% of business owners/managers believe their turnover will decline, 17% expect no change and 58% expect growth (6.4% rapidly).



Survey results in detail

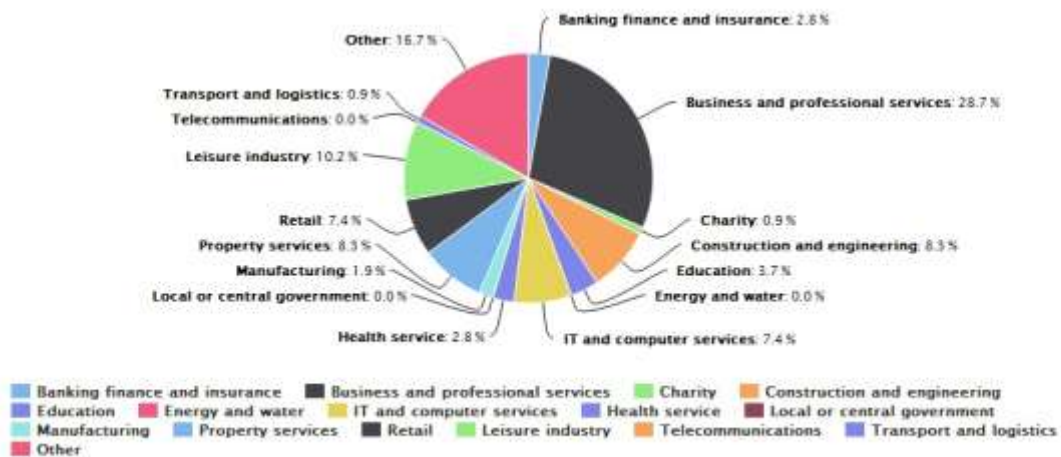
1. Are you involved in running a business?



Answer	#	%
Sole owner	46	15.4%
Part owner	21	7%
Manager/Director	47	15.7%
No	185	61.9%
Total	299	100%
Skipped	4	1.32%



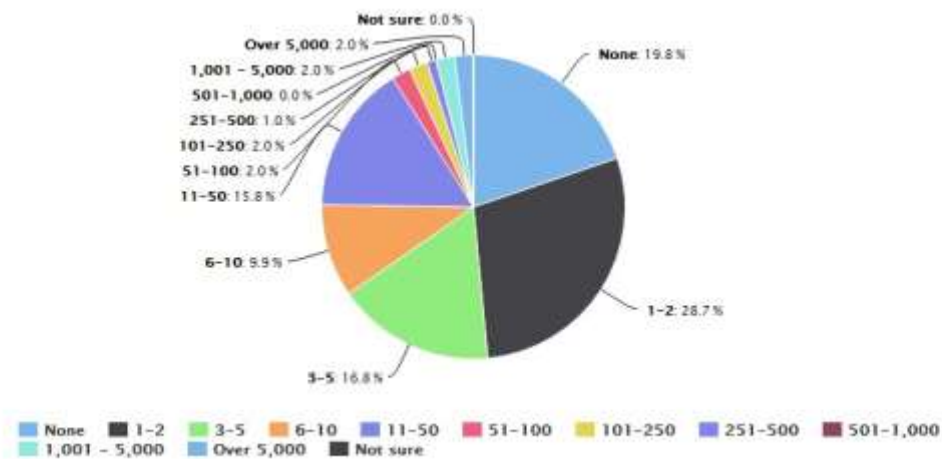
3. Which of these best describes the sector in which you work?



Answer	#	%
Banking finance and insurance	3	2.8%
Business and professional services	31	28.7%
Charity	1	0.9%
Construction and engineering	9	8.3%
Education	4	3.7%
Energy and water		0%
IT and computer services	8	7.4%
Health service	3	2.8%
Local or central government		0%
Manufacturing	2	1.9%
Property services	9	8.3%
Retail	8	7.4%
Leisure industry	11	10.2%
Telecommunications		0%
Transport and logistics	1	0.9%
Other	18	16.7%
Total	108	100%



4. Prior to the crisis, how many employees did your organisation have across all its locations?



Answer	#	%
None	20	19.8%
1-2	29	28.7%
3-5	17	16.8%
6-10	10	9.9%
11-50	16	15.8%
51-100	2	2%
101-250	2	2%
251-500	1	1%
501-1,000		0%
1,001 - 5,000	2	2%
Over 5,000	2	2%
Not sure		0%
Total	101	100%
Skipped	13	11.4%



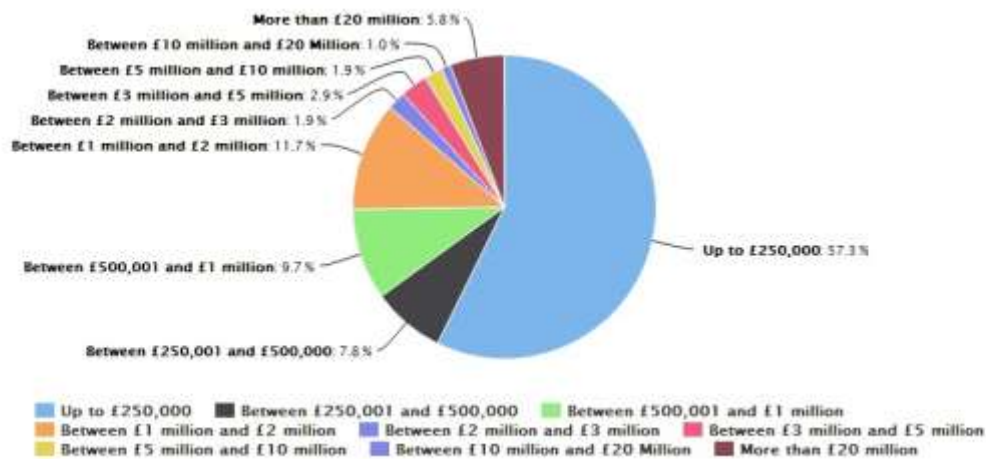
5. Where is your organisation based?



Answer	#	%
East Midlands	1	0.9%
Eastern England		0%
London	17	15.9%
North East	1	0.9%
North West	2	1.9%
South East	72	67.3%
South West	5	4.7%
West Midlands	3	2.8%
Yorkshire and the Humber	3	2.8%
Scotland	2	1.9%
Wales	1	0.9%
Northern Ireland		0%
Eire		0%
Total	107	100%
Skipped	7	6.14%



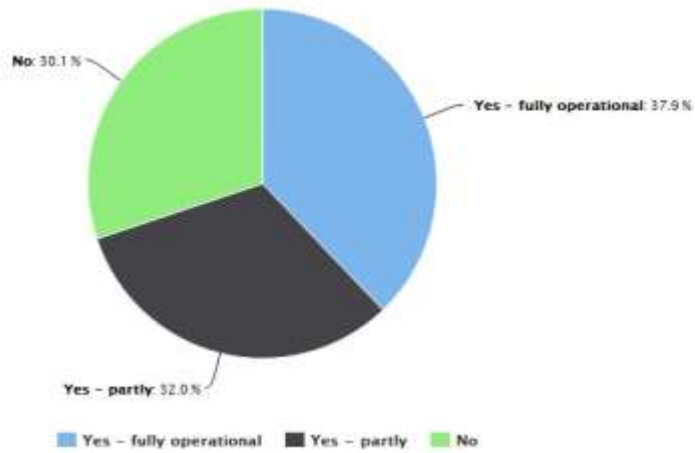
6. What was the approximate annual turnover of your business before the crisis?



Answer	#	%
Up to £250,000	59	57.3%
Between £250,001 and £500,000	8	7.8%
Between £500,001 and £1 million	10	9.7%
Between £1 million and £2 million	12	11.7%
Between £2 million and £3 million	2	1.9%
Between £3 million and £5 million	3	2.9%
Between £5 million and £10 million	2	1.9%
Between £10 million and £20 Million	1	1%
More than £20 million	6	5.8%
Total	103	100%
Skipped	11	9.65%



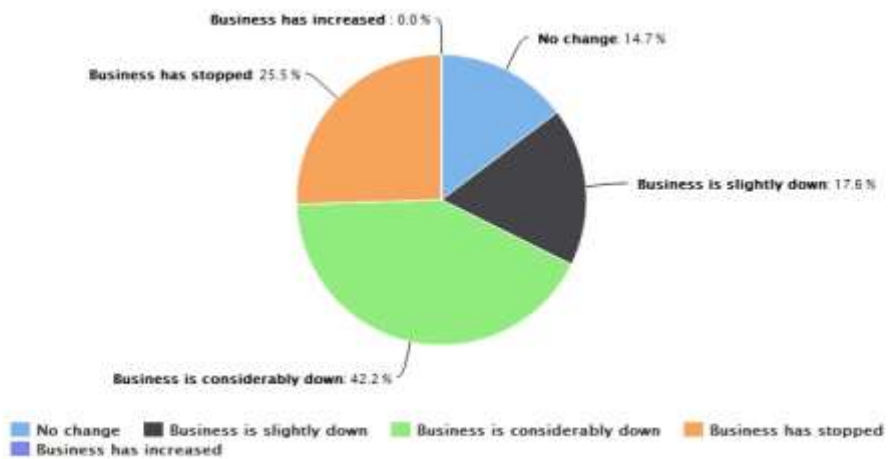
7. Is your business running during the current crisis?



Answer	#	%
Yes – fully operational	39	37.9%
Yes - partly	33	32%
No	31	30.1%
Total	103	100%
Skipped	4	3.74%



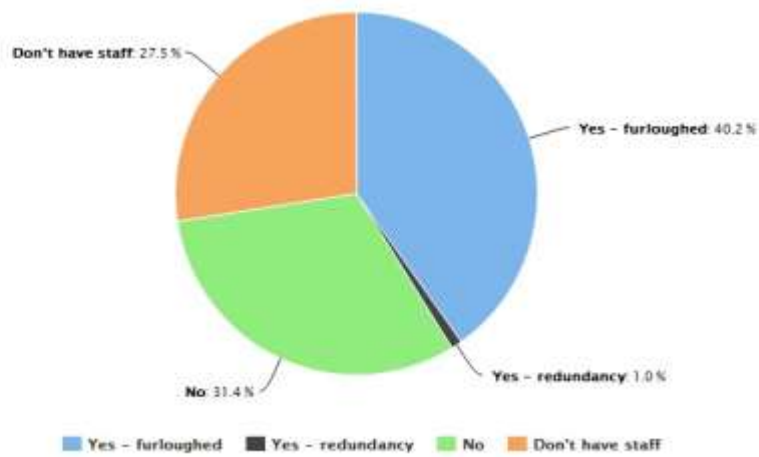
8. How has your turnover been affected by the crisis?



Answer	#	%
No change	15	14.6%
Business is slightly down	18	17.5%
Business is considerably down	43	41.7%
Business has stopped	26	25.2%
Business has increased		0%
Total	103	100%
Skipped	4	3.74%



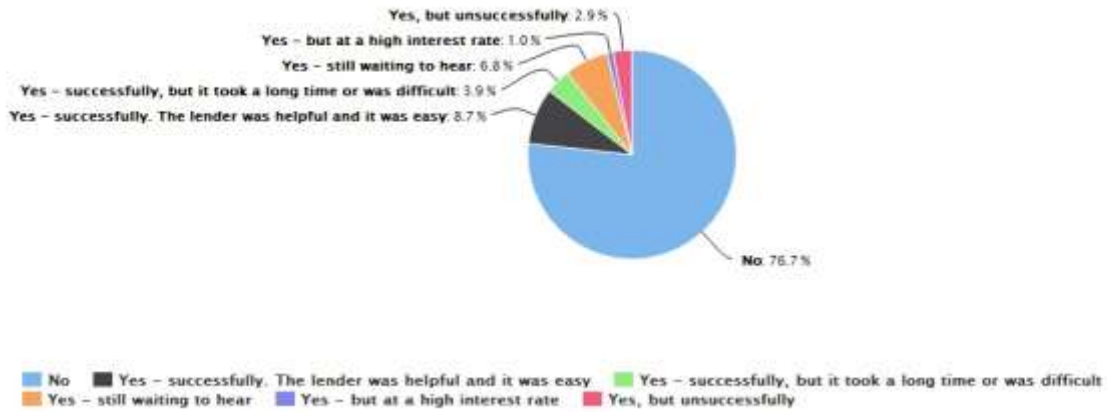
9. Have you laid off staff?



Answer	#	%
Yes – furloughed	41	40.2%
Yes – redundancy	1	1%
No	32	31.4%
Don't have staff	28	27.5%
Total	102	100%
Skipped	5	4.67%



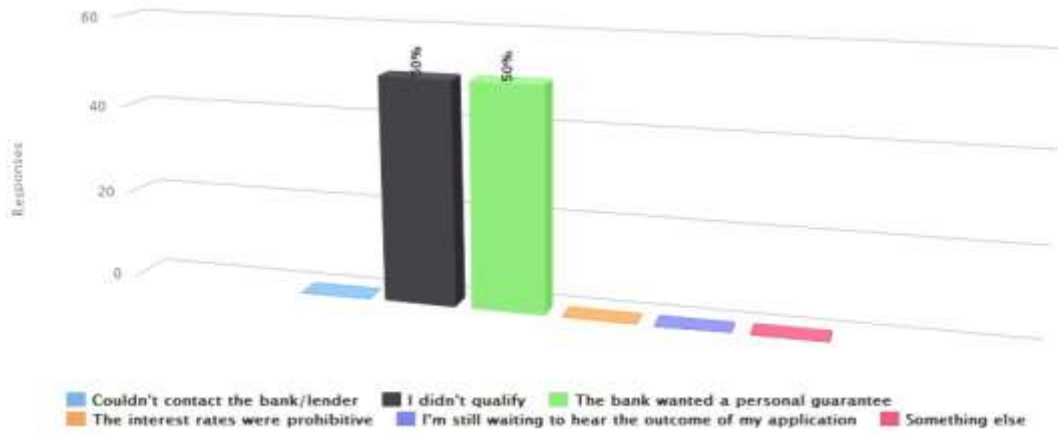
10. Have you approached a bank or other lender for help as a result of the crisis?



Answer	#	%
No	79	76.7%
Yes - successfully. The lender was helpful and it was easy	9	8.7%
Yes - successfully, but it took a long time or was difficult	4	3.9%
Yes - still waiting to hear	7	6.8%
Yes - but at a high interest rate	1	1%
Yes, but unsuccessfully	3	2.9%
Total	103	100%
Skipped	4	3.74%



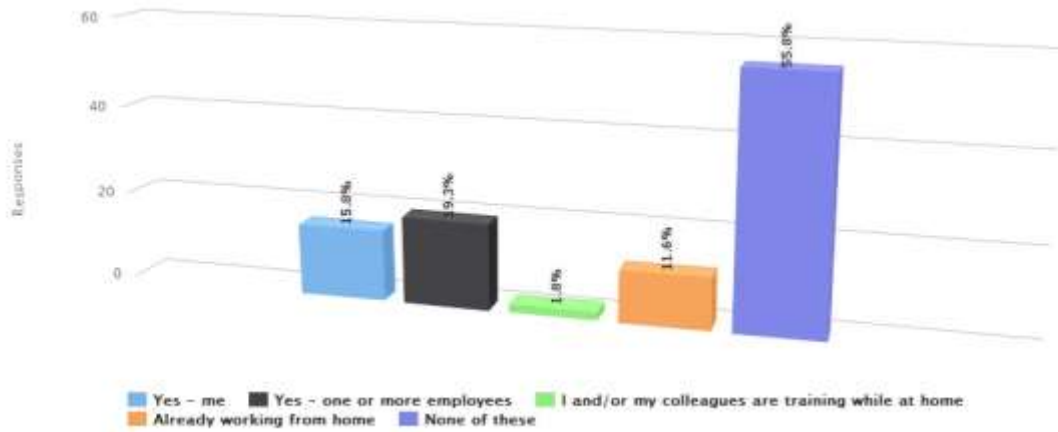
11. Why were you unsuccessful in your request for help?



Answer	#	%
I didn't qualify	1	50%
The bank wanted a personal guarantee	1	50%
Something else		0%
Total	2	100%



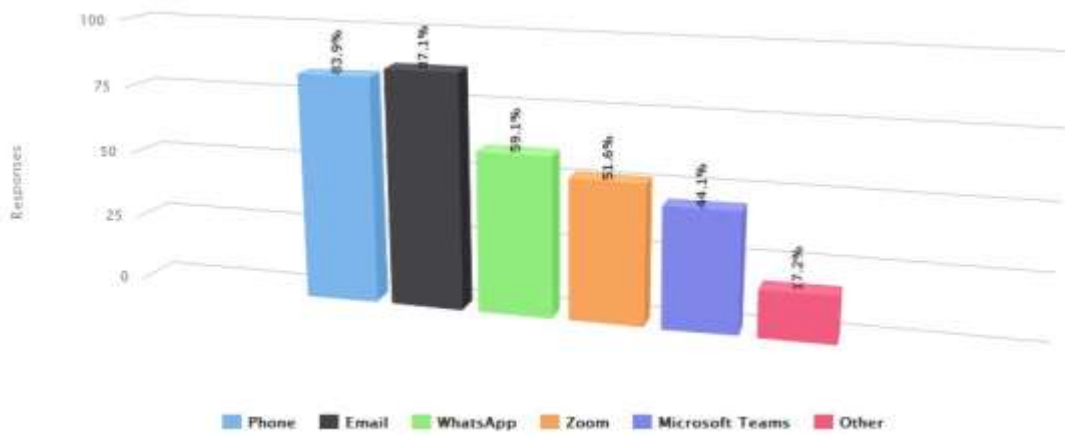
12. Are you or your colleagues (not usually working at home) working from home?



Answer	#	%
Yes – me	45	15.8%
Yes – one or more employees	55	19.3%
I and/or my colleagues are training while at home	5	1.8%
Already working from home	33	11.6%
None of these	159	55.8%
Total	285	100%



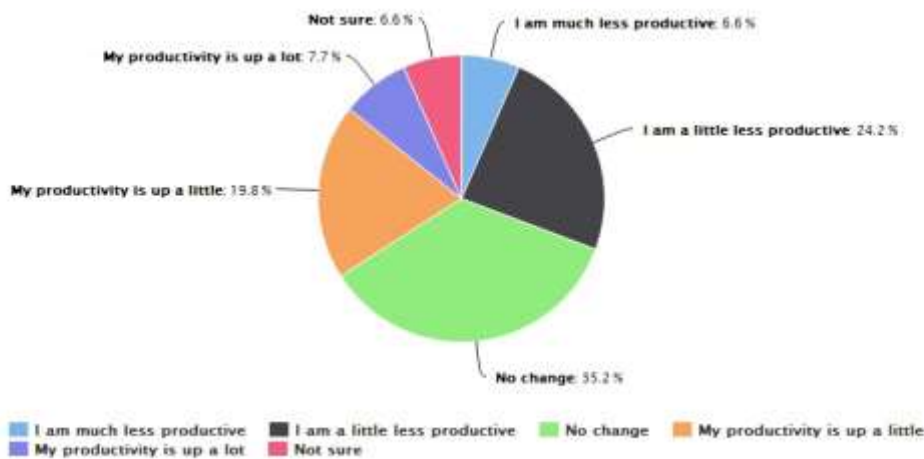
13. What tools do you use to stay connected with your colleagues?



Answer	#	%
Phone	78	83.9%
Email	81	87.1%
WhatsApp	55	59.1%
Zoom	48	51.6%
Microsoft Teams	41	44.1%
Other	16	17.2%
Total	93	100%



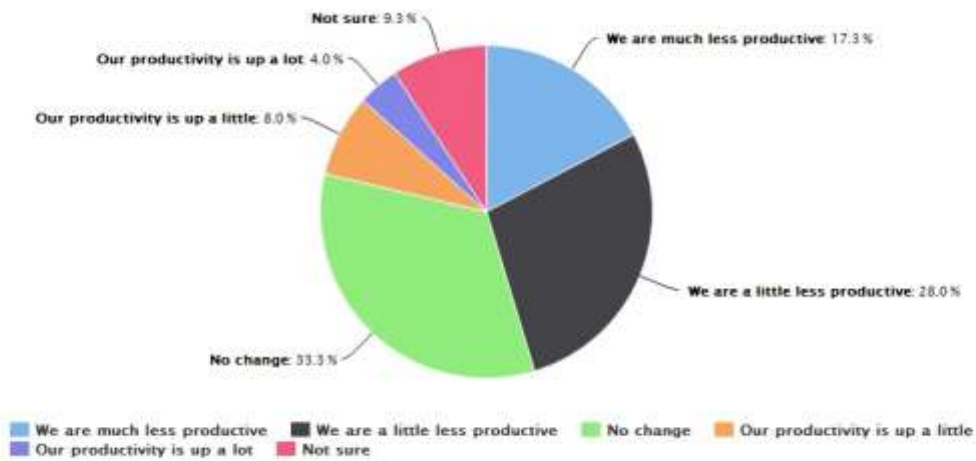
14. How do you think remote working has affected your productivity?



Answer	#	%
I am much less productive	6	6.6%
I am a little less productive	22	24.2%
No change	32	35.2%
My productivity is up a little	18	19.8%
My productivity is up a lot	7	7.7%
Not sure	6	6.6%
Total	91	100%
Skipped	8	8.08%



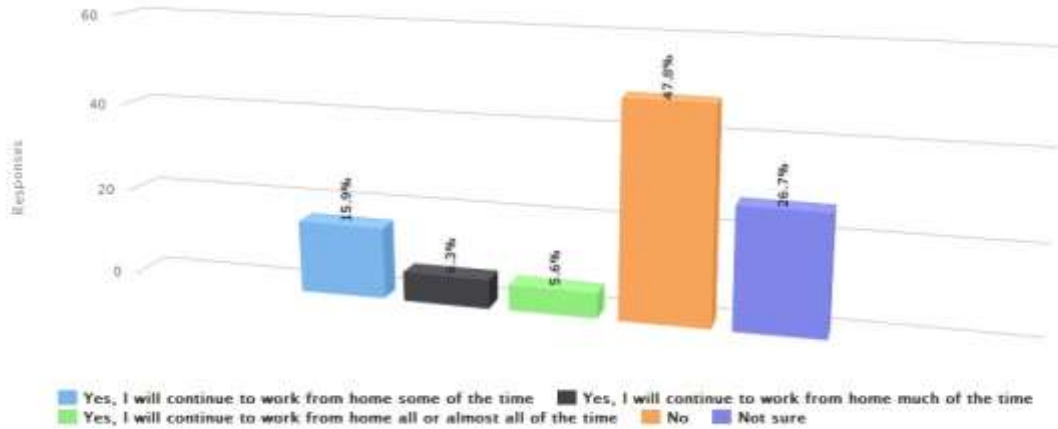
15. How do you think remote working has affected productivity for your organisation as a whole?



Answer	#	%
We are much less productive	13	17.3%
We are a little less productive	21	28%
No change	25	33.3%
Our productivity is up a little	6	8%
Our productivity is up a lot	3	4%
Not sure	7	9.3%
Total	75	100%
Skipped	1	1.32%



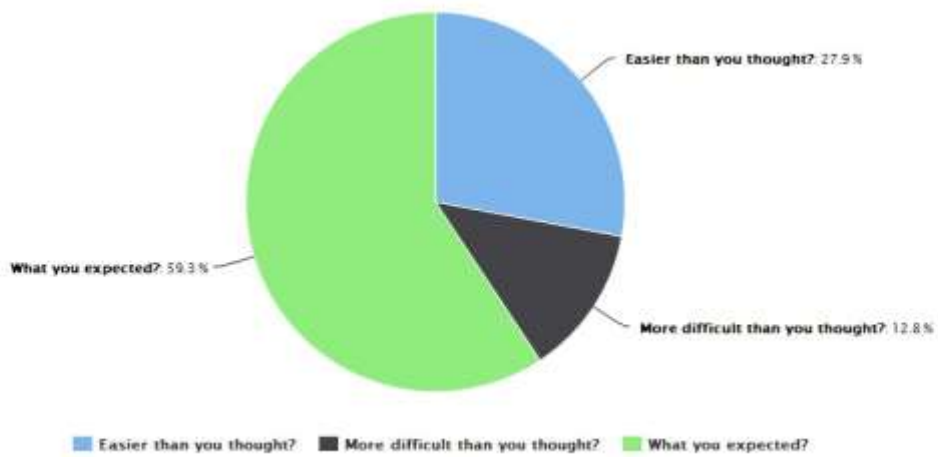
16. Do you think you/your organisation might adopt different working patterns once the crisis is over?



Answer	#	%
Yes, I will continue to work from home some of the time	43	15.9%
Yes, I will continue to work from home much of the time	17	6.3%
Yes, I will continue to work from home all or almost all of the time	15	5.6%
No	129	47.8%
Not sure	72	26.7%
Total	270	100%



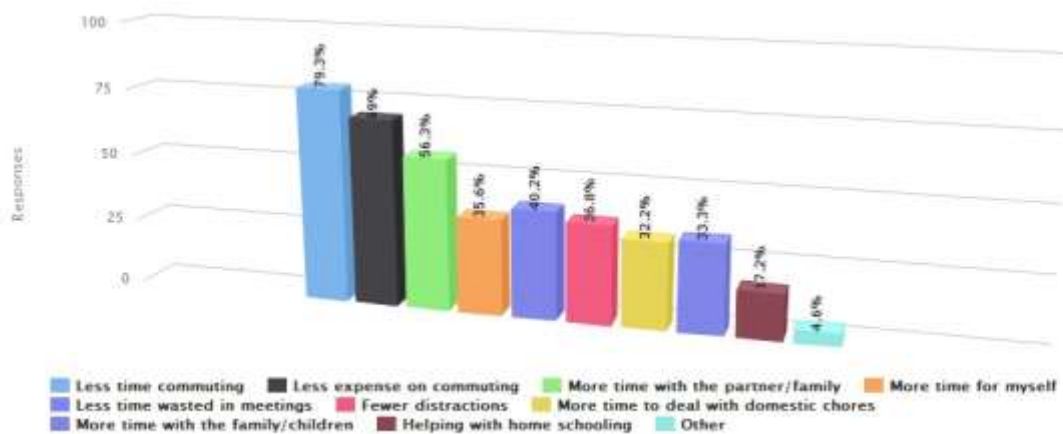
17. Has working from home been:



Answer	#	%
Easier than you thought?	24	27.9%
More difficult than you thought?	11	12.8%
What you expected?	51	59.3%
Total	86	100%
Skipped	2	2.27%



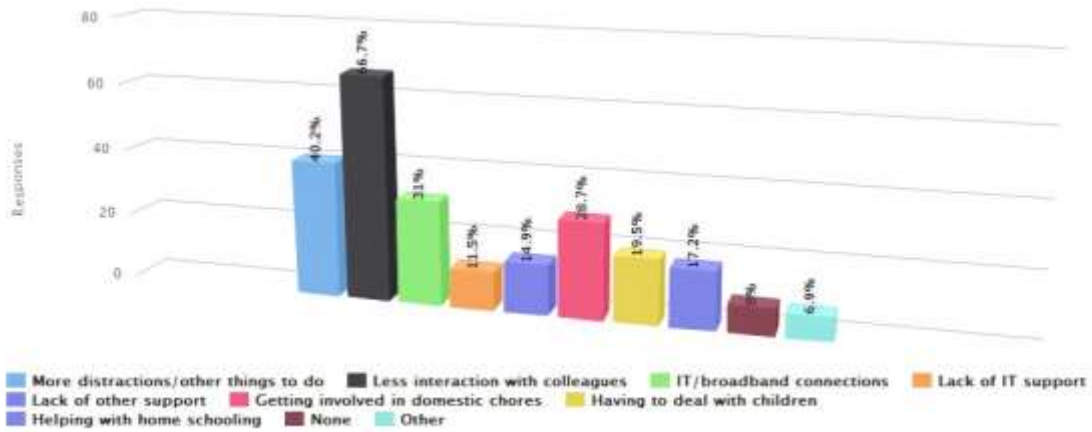
18. What are the benefits of working from home?



Answer	#	%
Less time commuting	69	79.3%
Less expense on commuting	60	69%
More time with the partner/family	49	56.3%
More time for myself	31	35.6%
Less time wasted in meetings	35	40.2%
Fewer distractions	32	36.8%
More time to deal with domestic chores	28	32.2%
More time with the family/children	29	33.3%
Helping with home schooling	15	17.2%
Other	4	4.6%
Total	87	100%



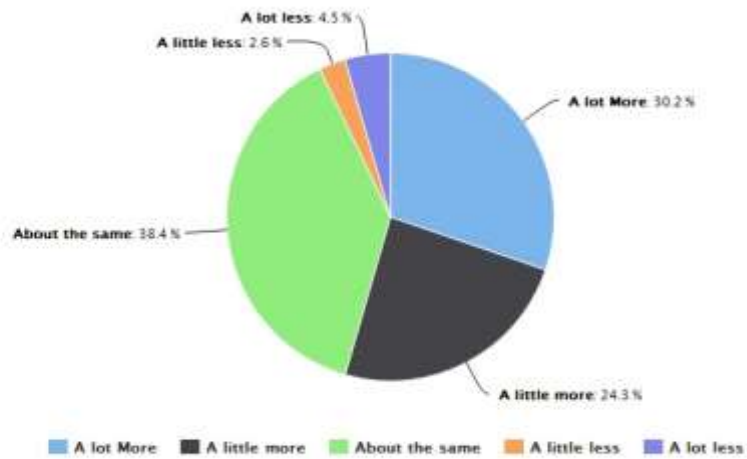
19. What have been the downsides of working from home?



Answer	#	%
Less interaction with colleagues	58	66.7%
More distractions/other things to do	35	40.2%
IT/broadband connections	27	31%
Getting involved in domestic chores	25	28.7%
Having to deal with children	17	19.5%
Helping with home schooling	15	17.2%
Lack of other support	13	14.9%
Lack of IT support	10	11.5%
None	7	8%
Other	6	6.9%
Total	87	100%



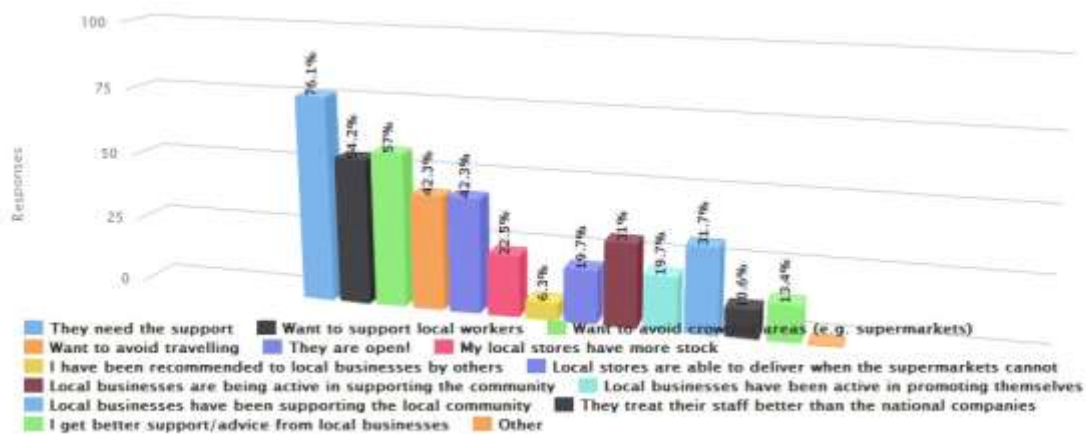
20. Have you been supporting local businesses more or less since the outbreak for business or domestic purchases?



Answer	#	%
A lot More	81	30.2%
A little more	65	24.3%
About the same	103	38.4%
A little less	7	2.6%
A lot less	12	4.5%
Total	268	100%
Skipped	5	1.83%



21. Why have you been using local businesses more?

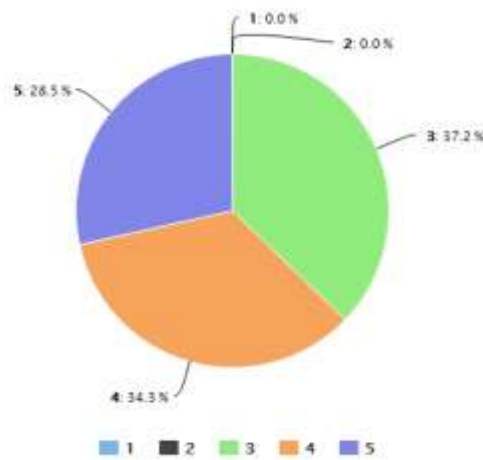


Answer	#	%
They need the support	108	76.1%
Want to avoid crowded areas (e.g. supermarkets)	81	57%
Want to support local workers	77	54.2%
Want to avoid travelling	60	42.3%
They are open!	60	42.3%
Local businesses have been supporting the	45	31.7%
Local businesses are being active in	44	31%
My local stores have more stock	32	22.5%
Local stores are able to deliver when the	28	19.7%
Local businesses have been active in	28	19.7%
I get better support/advice from local	19	13.4%
They treat their staff better than the national	15	10.6%
I have been recommended to local businesses	9	6.3%
Total	142	100%



What has been your experience of using local businesses more, in comparison to your usual practice? Have any of these been better or worse?

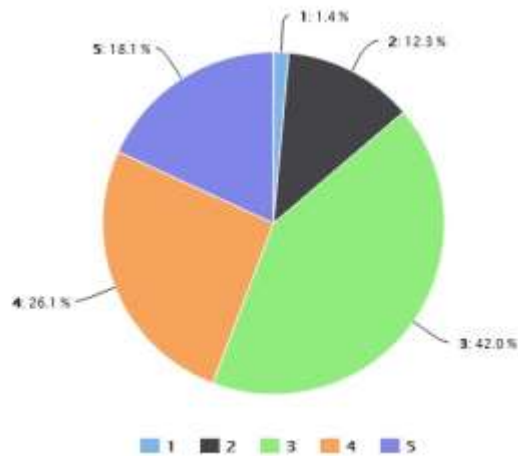
22. Service



Answer	#	%
1 – Much worse		0%
2		0%
3	51	37.2%
4	47	34.3%
5 – Much better	39	28.5%
Average	3.91	
Total	137	100%
Skipped	3	2.14%



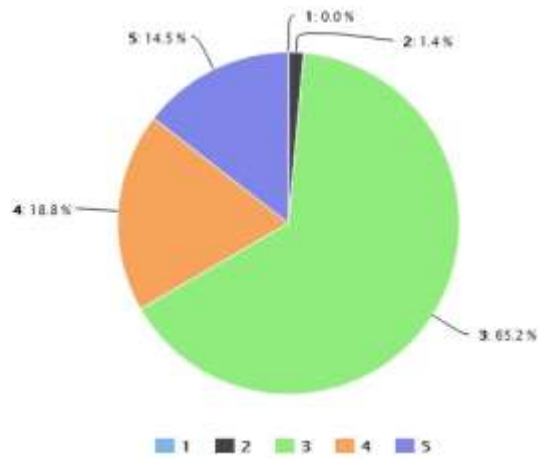
23. Stock availability



Answer	#	%
1 – Much worse	2	1.4%
2	17	12.3%
3	58	42%
4	36	26.1%
5 – Much better	25	18.1%
Average	3.47	
Total	138	100%
Skipped	2	1.43%



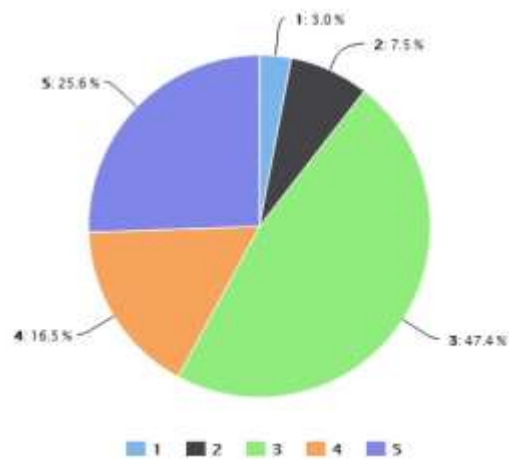
24. Advice



Answer	#	%
1 – Much worse		0%
2	2	1.4%
3	90	65.2%
4	26	18.8%
5 – Much better	20	14.5%
Average	3.46	
Total	138	100%
Skipped	2	1.43%



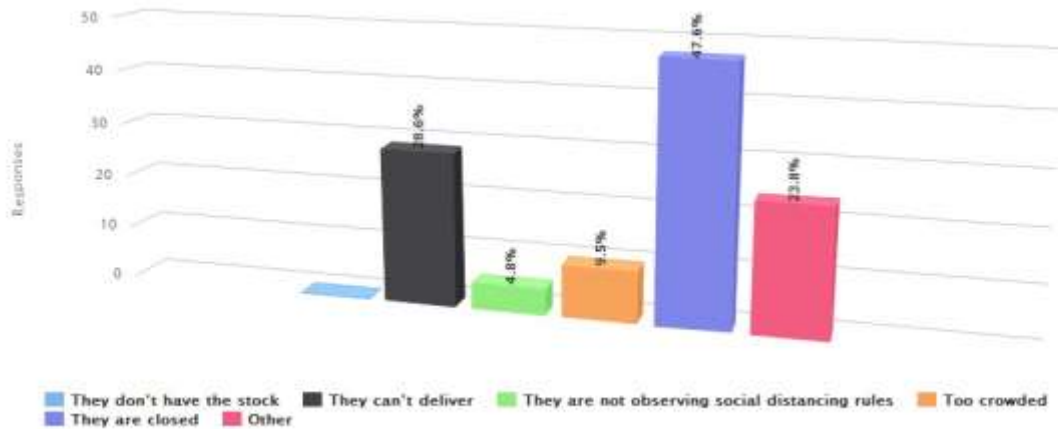
25. Availability of deliveries



Answer	#	%
1 – Much worse	4	3%
2	10	7.5%
3	63	47.4%
4	22	16.5%
5 – Much better	34	25.6%
Average	3.54	
Total	133	100%
Skipped	7	5%



26. Why are you supporting local businesses less?



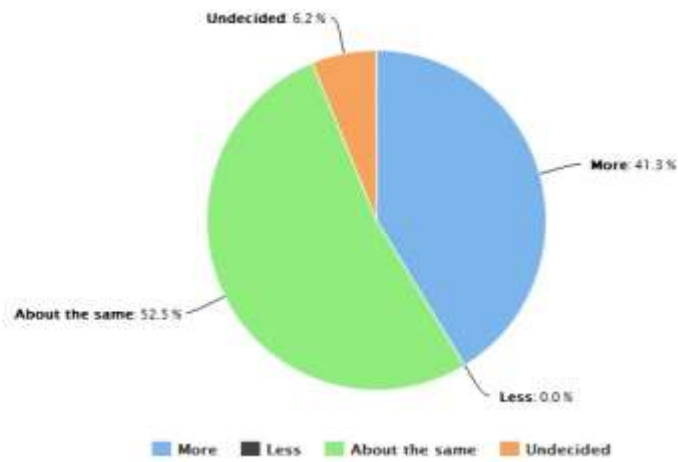
Custom Responses:

Answer	#	%
They can't deliver	6	28.6%
They are not observing social distancing rules	1	4.8%
Too crowded	2	9.5%
They are closed	10	47.6%
Other	5	23.8%
Total	21	100%

Answer	#	%
Not going out	1	20%
I am isolating	1	20%
Have to stay indoors for 3months.	1	20%
	2	40%
Total	5	100%



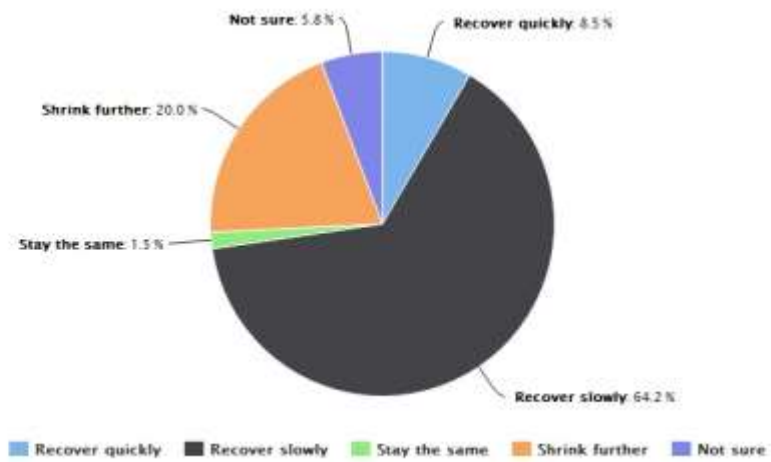
27. Once the crisis has passed, will you support local businesses:



Answer	#	%
More	107	41.3%
Less		0%
About the same	136	52.5%
Undecided	16	6.2%
Total	259	100%
Skipped	8	3%



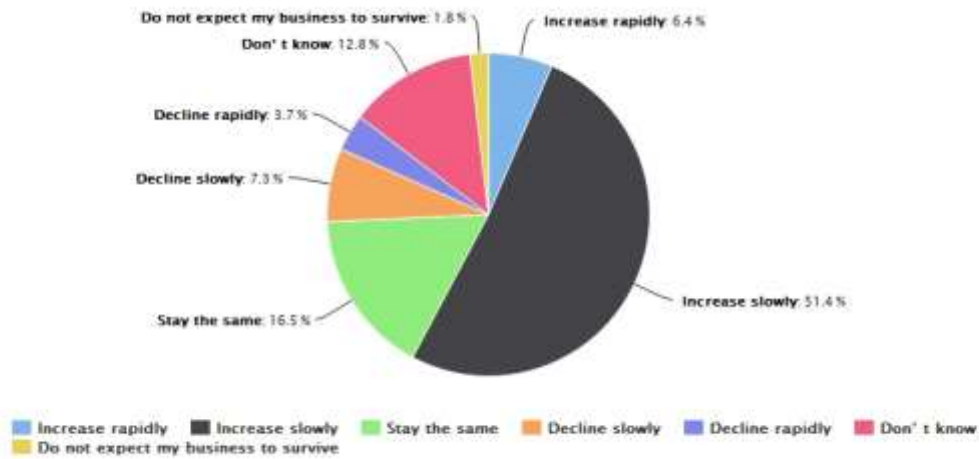
28. Once the crisis has passed, what do you expect to happen to the UK economy?



Answer	#	%
Recover quickly	22	8.5%
Recover slowly	167	64.2%
Stay the same	4	1.5%
Shrink further	52	20%
Not sure	15	5.8%
Total	260	100%
Skipped	6	2.26%



29. What do you expect to happen to your business’s turnover once the lock down has finished?



Answer	#	%
Increase rapidly	7	6.4%
Increase slowly	56	51.4%
Stay the same	18	16.5%
Decline slowly	8	7.3%
Decline rapidly	4	3.7%
Don't know	14	12.8%
Do not expect my business to survive	2	1.8%
Total	109	100%
Skipped	6	5.22%

