

Business Recovery Survey – Autumn 2020

ENGAGEMENT REPORT

A review of the feedback on how businesses have been impacted by the Covid-19 pandemic, to inform the help and support offered to businesses in the future.

NOVEMBER 2020



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The appendices documents are available to view in a separate document on the South and Vale Business Support [website](#):

APPENDIX A – BACKGROUND TO THE ENGAGEMENT
APPENDIX B – ENGAGEMENT METHODOLOGY
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APPENDIX D – SURVEY
APPENDIX E – QUANTITATIVE DATA
APPENDIX F – FULL LIST OF COMMENTS RECEIVED

NB: We report in percentages even when there are less than 100 responses. When stating percentages in the analysis, we are referring to the percentage of respondents that answered the specific question, rather than the total number of responses to the overall survey. Response percentages may not add up to 100% due to rounding up over .5 and rounding down under .5

Words that appear in italics are quotes taken from comments received.

For many of the questions, responders could choose multiple answers to a question, for clarity when reporting the data, 'tick all that apply' text is added to the question. Therefore percentages will not always add up to 100. Text in italics is added for clarification.

SUMMARY

This report has been produced by council officers to analyse the results of the South and Vale Business Recovery Survey – Autumn 2020. The survey was designed to help the councils understand how the Covid-19 pandemic has affected businesses across the districts. The feedback from this engagement exercise will help to inform and guide the councils' future business support initiatives.

We ran a survey that asked businesses based or trading in the area for feedback on how their business has been impacted, whether it has affected them negatively, positively or it has not affected them at all. We also asked respondents to indicate in the survey if their business or industry requires further support so that we can work with appropriate organisations to help influence wider support and recovery plans. The survey was open to all businesses operating in South Oxfordshire and Vale of White Horse.

The survey ran for three weeks between 16 September and 7 October 2020 and was open to all businesses operating within South Oxfordshire and Vale of White Horse. The survey consisted of 30 questions. In total 207 responses were received. Thank you to everyone who contributed their views, it was an involved survey and with so many responses we have a lot of useful data, which is really helpful and informative. We asked one representative to complete the survey on behalf of each organisation, and to use the most commonly held views for the organisation. Where there were differing views, there was space provided to give further comments.

The majority of businesses responding, 65%, are based in South Oxfordshire, while 33% are based in Vale of White Horse and the remaining 4% were based out of the districts but trading within them. Businesses operate from a variety of locations, including from town centres (21%), home based (20%), business parks (19%) villages (13%) and rural settings (10%), with the remaining 11% operating from 'other' locations. By far the majority of businesses responding told us their legal entity is a limited company (66%), with 22% sole traders, 5% partnerships and 4% charities. As we expected, small businesses employing 1-9 employees are hugely represented in the data, at 85%. 13% of participants employ 10 to 49 staff and 1% employ over 50 staff.

KEY FINDINGS

Negative effects of the pandemic:

- 18% of respondents stated that they had adapted their workplace to meet the challenges of the pandemic. This has not just meant following the Covid-secure guidelines but also looking to increase ventilation, spreading out workstations etc. This will likely lead to reduced volume of trade in many businesses.
- Just under 17% of respondents specified that their workplace had reduced in size as a result of the pandemic. In contrast, a little over 3% said that their workplace had grown.

- Of the 38 respondents who suggested that their workplace needs had changed for other non-listed reasons, 24% mentioned that they were requiring less workspace as a result of the pandemic.
- Most responders have had to make some form of physical adaptation to their business in order to comply with the current regulations. 64% of businesses who replied to this question had made changes to enforce social distancing, while 59% had installed hand sanitising stations. These were the only physical adaptations cited in more than half of the contributions.
- Lockdown squeezed finances and the ongoing uncertainty have acted as a drag on economic activity which has negatively affected companies throughout South Oxfordshire and Vale of White Horse. The biggest challenge that businesses currently face as a result of the pandemic is lower consumer demand. 67% of respondents cited this as one of the main challenges their enterprise currently faces. Apart from managing cash flow (which featured in 56% of replies), no other issues appeared in over half of the responses to this question.
- Broadly businesses are weathering the storm, but if current economic conditions do not improve, over half of respondents do not expect to survive the coming 18 months.
- There is a notable degree of anger/resentment from business owners who were ineligible for national schemes, some of which have been administered locally. Many believe that their plight has been ignored/side-lined by government. Just under 30% of respondents, when asked is there anything else you'd like to tell us, raised this as an issue. Examples of some of the comments include:

I have no business rated premises or business rent... I get NO central or local government grant and NO 80% of earnings like the employed or self-employed.

My business has been excluded from all support, including discretionary grants... I was also excluded from the self-employment grant... Support should be available for us who have fallen through the gaps.

I am one of those start-up businesses that was not eligible for any national or local Covid-19 funding schemes, so I feel I have been completely alone in facing this crisis.

Positive effects of the pandemic:

- The majority of respondents (65%) do not plan to make any redundancies within the next twelve months despite the impacts of the pandemic. While this is encouraging, it may reflect the types and size of businesses that responded.
- From [separate government statistics](#), we are aware that between 24 and 27% of the local workforce has been supported by the Coronavirus Job Retention Scheme. The relatively low number of planned redundancies may be attributed to ongoing job support schemes that were announced by government during the survey engagement period.

- Around a fifth (21%) of respondents mentioned that the pandemic had led them to develop an online presence. While 19% of respondents said that, as a result of Covid-19, their businesses had diversified into new areas. For some this has meant streamlining processes to improve efficiency and flexibility, while for others it has been about embracing and utilising modern technology. 11% of participants described how the pandemic had given them more time to think, innovate and skill-up.
- Below are some examples of positive comments from participants:

The Vale team were really lovely and supportive during lockdown. This is hugely appreciated. It's very easy to feel like you are lost in the machine but having a real team of human beings to talk to was invaluable when too often you end up feeling like you are spending your day talking to chat bots or filling in forms and sending them off into the void.

Your ongoing support has been greatly appreciated.

The support you've given us has made a huge difference to our business and taken a lot of pressure away.

You are doing a great job supporting local businesses.

Support from the South and Vale Business Support team:

- 49% of businesses are unaware of any of the support services currently provided by the South and Vale Business Support Team. Furthermore, of those that are to some degree aware of the activities of the Business Support Team, over half are unfamiliar with the full range of services currently provided. There are particular gaps regarding this: finding new premises for your business (65% of respondents were unaware of this service), accessing superfast broadband (58%), digital skills seminars (51%) and skills and employment (51%).
- In both the short and medium-term, respondents believed that financial support and help finding new customers would make the biggest difference to their business. Of the potential options for providing assistance that South and Vale Business Support could explore these are regarded as the most valuable – 34% and 33% of respondents stated that financial support and help finding new customers, respectively, would make the biggest difference to their business between now and next spring. The need for further financial assistance may be attributed to 44% of responding businesses operating in areas that have experienced severe disruption during the pandemic, including retail, food, accommodation, health, fitness and leisure.
- Over half of respondents (57%) responded 'yes' when asked if they would be interested in a future potential online sales portal for South and Vale based businesses. These businesses provided their contact details, allowing us to reach out to discuss the opportunity.

- At 53%, over half of all respondents are interested in having a one to one discussion with the South and Vale Business Support team. These businesses also provided us with their contact details.
- Being a part of a focus group or a similar initiative will enable businesses to advise the team on where we should focus our resources. 47% of participants think that this would be useful for their business.

A summary of findings is collated in this report and will be used to guide the councils' plans for the help and support we offer to businesses in the future, through our business support initiatives. This report and the appendices will be published on our [South and Vale Business Support website](#). The reports will be also be shared with other local authorities and with OxLEP (Oxfordshire Local Enterprise Partnership). The data will also be disseminated to national government departments where relevant.

BACKGROUND TO THE ENGAGEMENT

The councils understand the Covid-19 pandemic has hit businesses in different ways. Some businesses have managed to adapt and diversify whilst many others have struggled and suffered.

We wanted to know how your business has been impacted, whether it has affected you negatively, positively or it has not affected you at all. Whatever your experiences, we wanted to hear your responses to this survey.

As a voice for our local businesses, it's important that we are able to understand what support and guidance is needed to aid recovery from the Covid-19 pandemic. Your feedback will guide our plans for the help and support we offer to businesses in the future, through our business support initiatives. We mentioned within the survey that feedback would help us to form our Economic Recovery Plan, however, since we launched the survey, the national picture has changed and it is clear that the recovery phase is still out of reach. This means that we will instead focus our resources in supporting our businesses at this current time.

If you believed your business or industry requires further support, we asked that you shared your views via the survey so that we may work with appropriate organisations to help influence wider support and recovery plans.

We asked one representative to complete the survey on behalf of each organisation to answer the survey using the most commonly held views for their organisation. If there were differing views within an organisation, there was space provided at the end of the survey to give further comments and feedback.

Full details are available at Appendix A.

ENGAGEMENT METHODOLOGY

A summary of the engagement and reporting methodology is below; full details are available at Appendix B.

A total of 1,035 e-newsletter notifications were sent to the South and Vale Business Support contacts to provide a link to the survey and details of how to comment. A copy of the e-newsletter notification can be found at Appendix C.

The e-newsletter included details of how to obtain a hard copy of the survey. South Oxfordshire and Vale of White Horse district councillors and staff were informed through internal communications.

An online survey offered participants the opportunity to indicate how businesses have been impacted by the Covid-19 pandemic, to inform our future business support initiatives that aim to shape the help and support offered to businesses in the future. A copy of the survey can be found at Appendix D.

The communications team at South Oxfordshire and Vale of White Horse District Councils promoted the survey to towns and parishes, and through councillor and staff updates. Social media messages (Twitter and Facebook) and articles on the South and Vale Business Support website were posted during the engagement period, to further publicise and encourage wide participation from businesses.

A three-week engagement period was given for submitting responses between 16 September and 7 October 2020. The original closing date was 30 September; the engagement was extended by one week to encourage more responses. The engagement was carried out in conformity with our public engagement charter¹.

A total of 207 completed responses were received. 49 people looked at the survey but didn't answer any of the questions. The South and Vale Business Support Facebook posts reached 1,442 people, and posts on the Twitter account reached 8,309 people during the engagement period. The South and Vale Business Support website received 132 visits to the dedicated Business Recovery Survey page.

A total of 67 comments were received in the open text question. Most of the comments contained several remarks or points within them and, where this is the case, each comment or point has been summarised individually for analysis purposes. Therefore, the total number of individual comments received runs into the 100's. A summary of the comments is included in this report. Any personal information supplied to us within the comments that could identify anyone has been redacted and will not be shared or published in the report. Some spelling, grammatical and punctuation errors in the original comments were corrected in this report; a full list of uncorrected comments can be found in Appendix F.

¹ <https://www.southoxon.gov.uk/south-oxfordshire-district-council/about-the-council/get-in-touch/consultations/> or <https://www.whitehorsedc.gov.uk/vale-of-white-horse-district-council/about-the-council/get-in-touch/consultations/>

KEY FINDINGS – QUANTITATIVE DATA

The key quantitative findings from the consultation are summarised below. Full demographic data can be found at Appendix E.

Respondents were not required to provide answers to all the questions. The survey provided an opportunity to provide comments and suggestions on anything that businesses felt it is important for us to know, as well as to sign up to contribute to ongoing recovery plans as part of a focus group or similar initiative.

There were 207 responses to the consultation. 65% of the businesses which responded were based in South Oxfordshire and 33% in Vale of White Horse. Most of the businesses that completed the survey were limited companies (66%) and over a fifth of respondents were sole traders (22%). 85% of the businesses which responded had between 1 and 9 staff members (including the owner).

The businesses who filled out the survey are involved in a wide range of different sectors including from health and fitness (12%), retail and wholesale trade (12%), accommodation and food services (10%) professional, scientific and technical services (7%) and advertising/marketing (6%). Around a third of businesses responding (32%) are from an 'other' industry.

What industry does your business operate in?

Respondents were asked what industry their business operates in. The question received a 100% response rate as all 207 respondents answered the question.

Q.1 What industry does your business operate in?



12% of respondents operate within the Health and Fitness industry, 12% work in Retail and Wholesale Trade and 11% operate within the Accommodation and Food Services industry. 7% of participants work in the Professional, Scientific and Technical Services sector, 6% of respondents operate in Advertising/Marketing and 5% of businesses are based in the Tourism industry.

Businesses who operate within Arts and Recreation services made up 4% of answers, while 3% operate in the Building and Construction industry.

2% of respondents operate within the Rental, Hiring and Real Estate industry, while Manufacturing businesses and Information Media and Telecommunications companies each made up 2% of submissions.

Furthermore, 2% of participants operate within the Financial and Insurance sector, with 1% of businesses each based in Fisheries or Forestry and Agriculture.

It is worth noting that the survey did not receive any contribution from businesses operating in Administrative and Support Services, or Transport, Posting and Warehousing.

32% of respondents to this question selected the 'other' option.

In 'other' answers

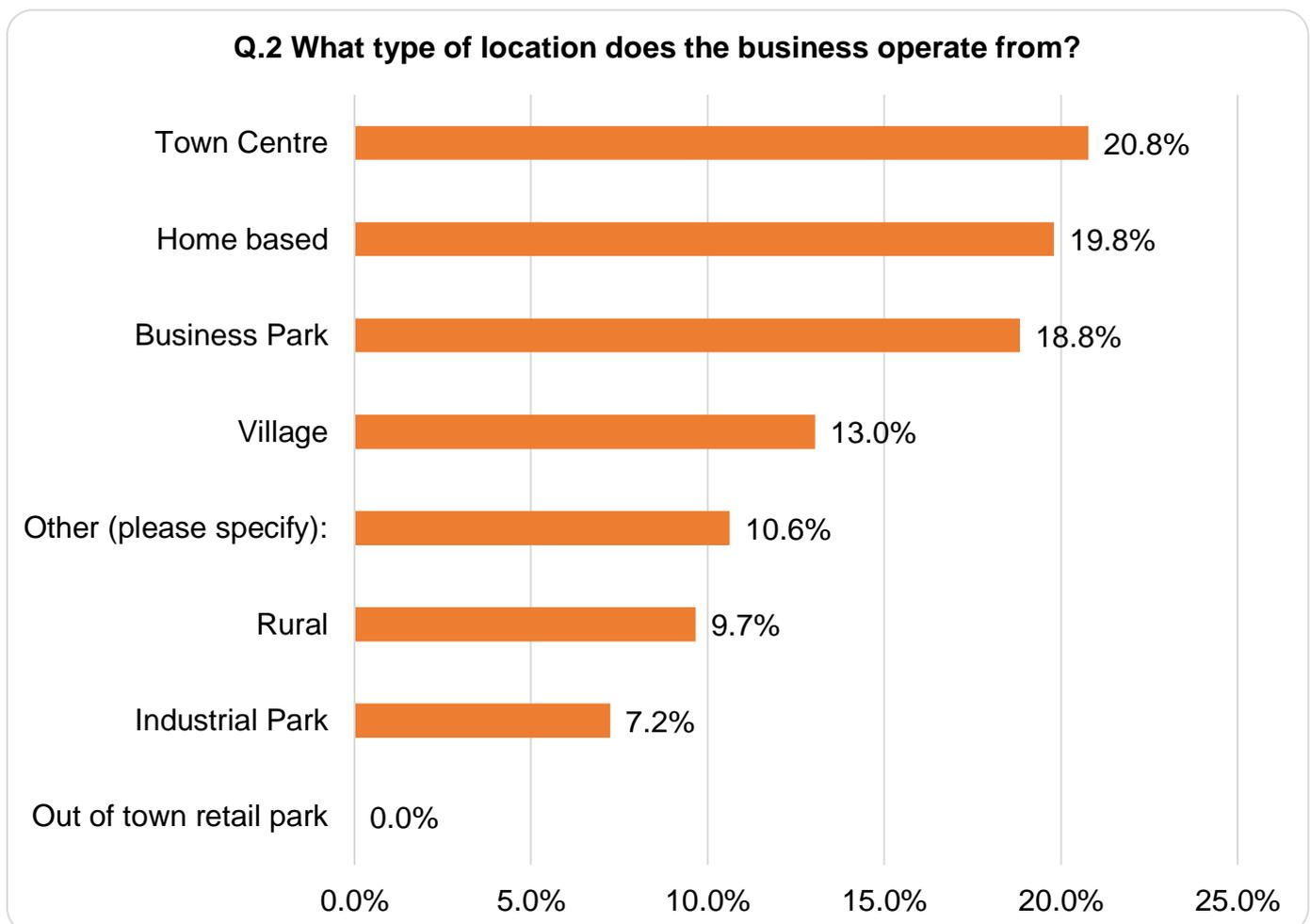
Of the 32% of 'other' answers, the most common industries seen were Events (14%), Automotive/Motorsport (8%) and Hair and Beauty (8%).

Education/Training Services, Hospitality, Photography businesses and those who worked in multiple industries each made up 5% of answers.

Animal based businesses, Business Advisers/Consultancy Services, Recruitment, Waste and Recycling, Software, Trade and community spaces each totalled 3% of submissions. A further 21 industries were recorded in the 'other' section, each totalling 2% of the overall answers.

What type of location does the business operate from?

Participants were asked what type of location their business operates from. The question was answered by 100% of participants.



The two most popular answers to this question were 'Town Centre' at 21%, and 'Home based' at 20%. This was closed followed by Business Parks, where 19% of respondents are based.

Of the respondents who answers this question, 13% of businesses operate within a village, with 10% of respondents trading from a rural area. A further 7% of businesses operate from an industrial park.

The survey did not receive any responses from businesses who trade from an out of town retail park.

Out of the 207 responses received for this question, 11% of businesses stated that they operate from 'other', non-listed areas.

In 'other' answers

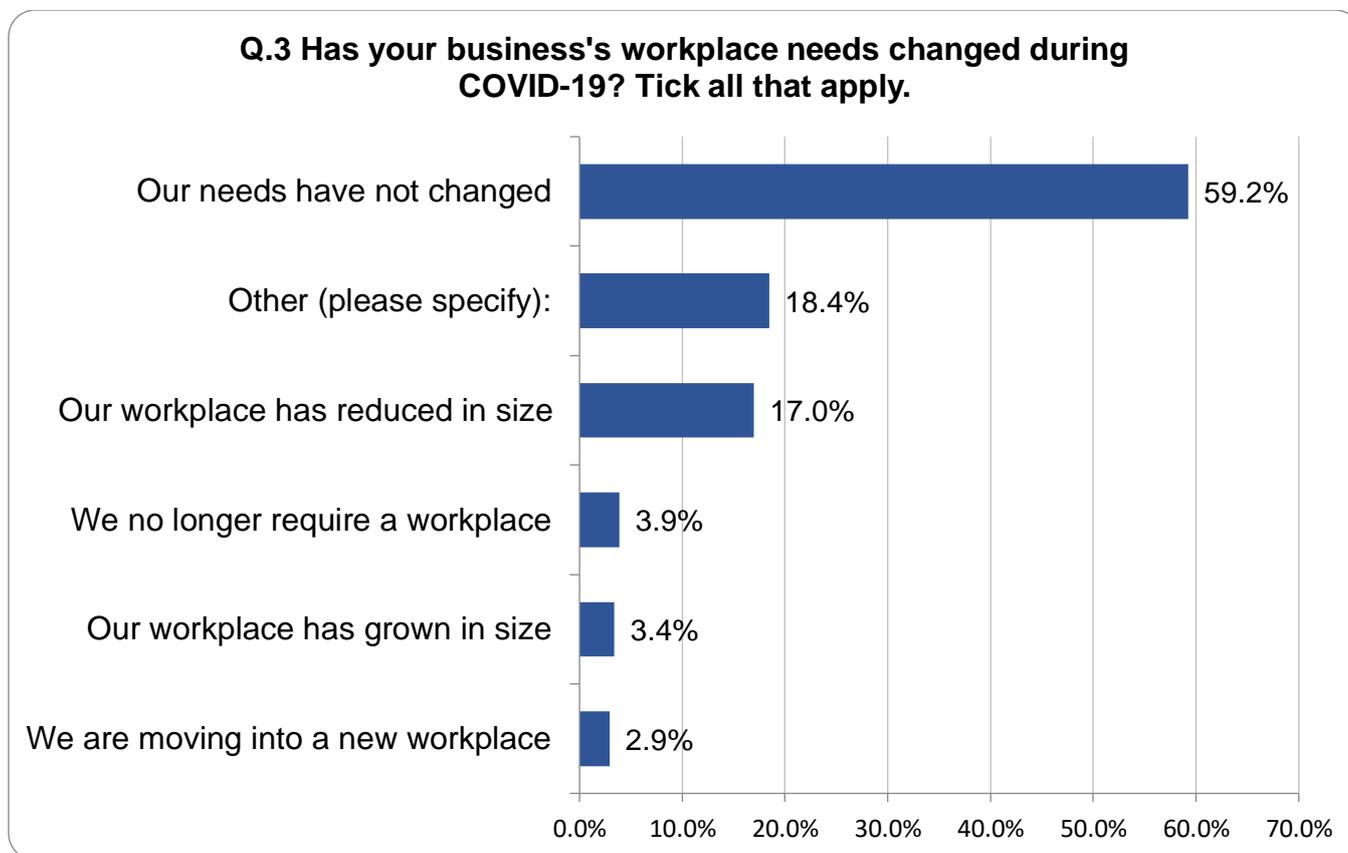
Of the 11% who selected the 'other' option, 47% stated that they operate from multiple locations.

The homes or venues of their clients, own homes and client premises, and within or near a town centre were the next most popular answers, each equalling 19%.

A further 11 responses were recorded in this section, each totalling 9%.

Has your business's workplace needs changed during Covid-19? Tick all that apply.

The councils received 206 responses to this question (99.5% of all the people who completed the survey provided an answer).



59% of responders to this question stated that their business' workplace needs had not changed as a result of the pandemic. This was by far the most popular option ticked in response to this question.

Just under 17% of respondents specified that workplace had reduced in size as a result of the pandemic. In contrast, a little over 3% said that their workplace had grown.

4% of the replies suggested that their business no longer required a workplace as a result of the pandemic, while 3% said that they were moving into a different/new workplace.

In 'other' answers

19% of responders (38 people) cited other, non-listed needs that had changed as a result of the pandemic. Of the 38 respondents who suggested that their workplace needs had changed for other non-listed reasons, 24% mentioned that they were requiring less workspace as a result of the pandemic. Some described how they were using fewer desks or had downsized due to a reduced number of people on site and/or lower business demands.

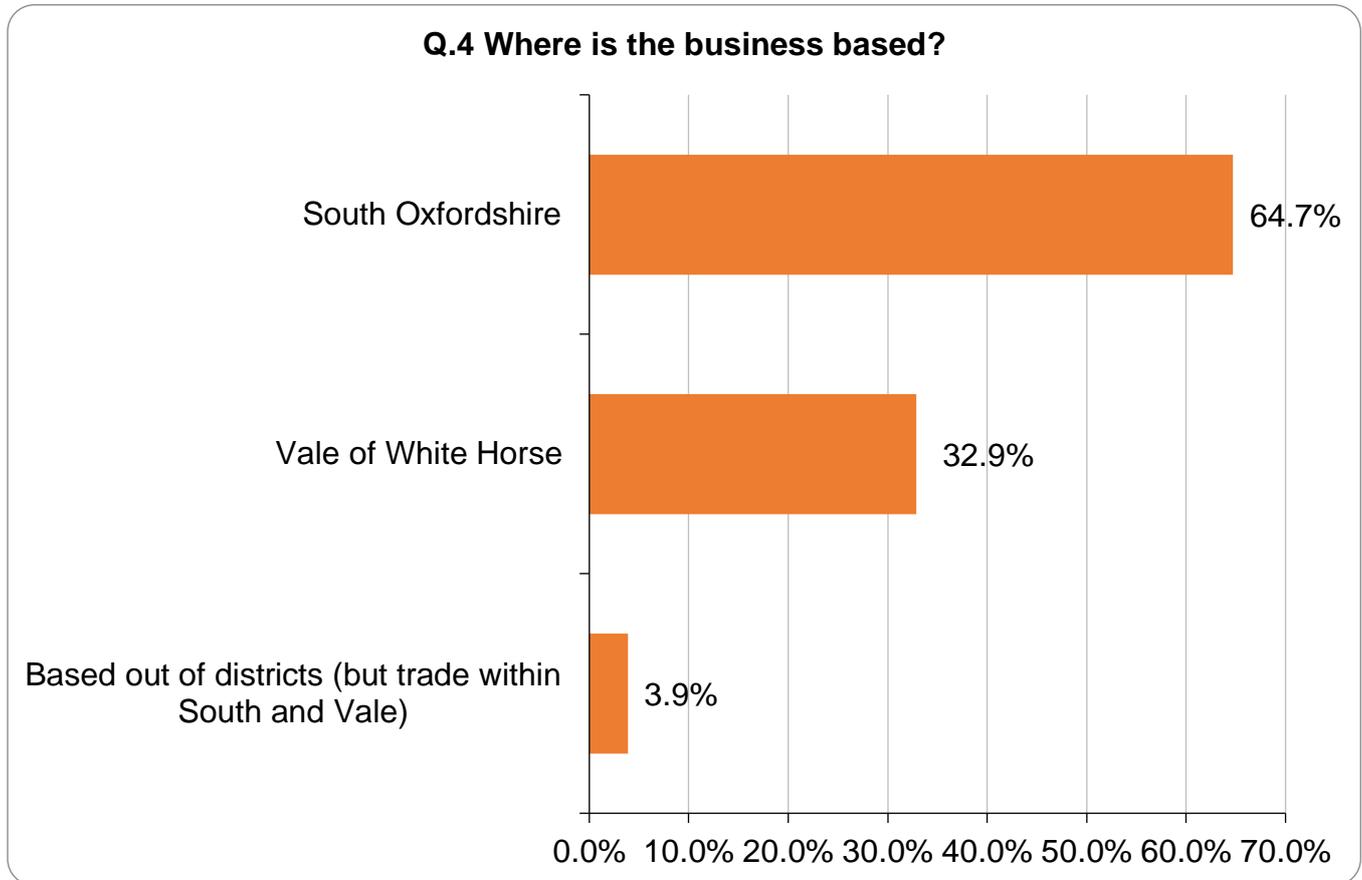
18% of respondents stated that they had adapted their workplace to meet the challenges of the pandemic. This has not just meant following the Covid-secure guidelines but also looking to increase ventilation, spreading out workstations etc.

Unfortunately, however, several respondents who cited other, non-listed answers (16%) revealed how the pandemic has meant that they no longer have/need a workplace. While for a few this may have been a conscious decision in response to Covid-19, for the majority it has been an unavoidable consequence of the illness or its knock-on effects (unable to access workplace due to ongoing restrictions, inability to make premises Covid-secure, financial difficulties etc).

Around 13% of responses highlighted that they had moved towards more home/remote working as a result of the pandemic.

Where is the business based?

Participants were asked where their business is based. The question was answered by 100% of participants.



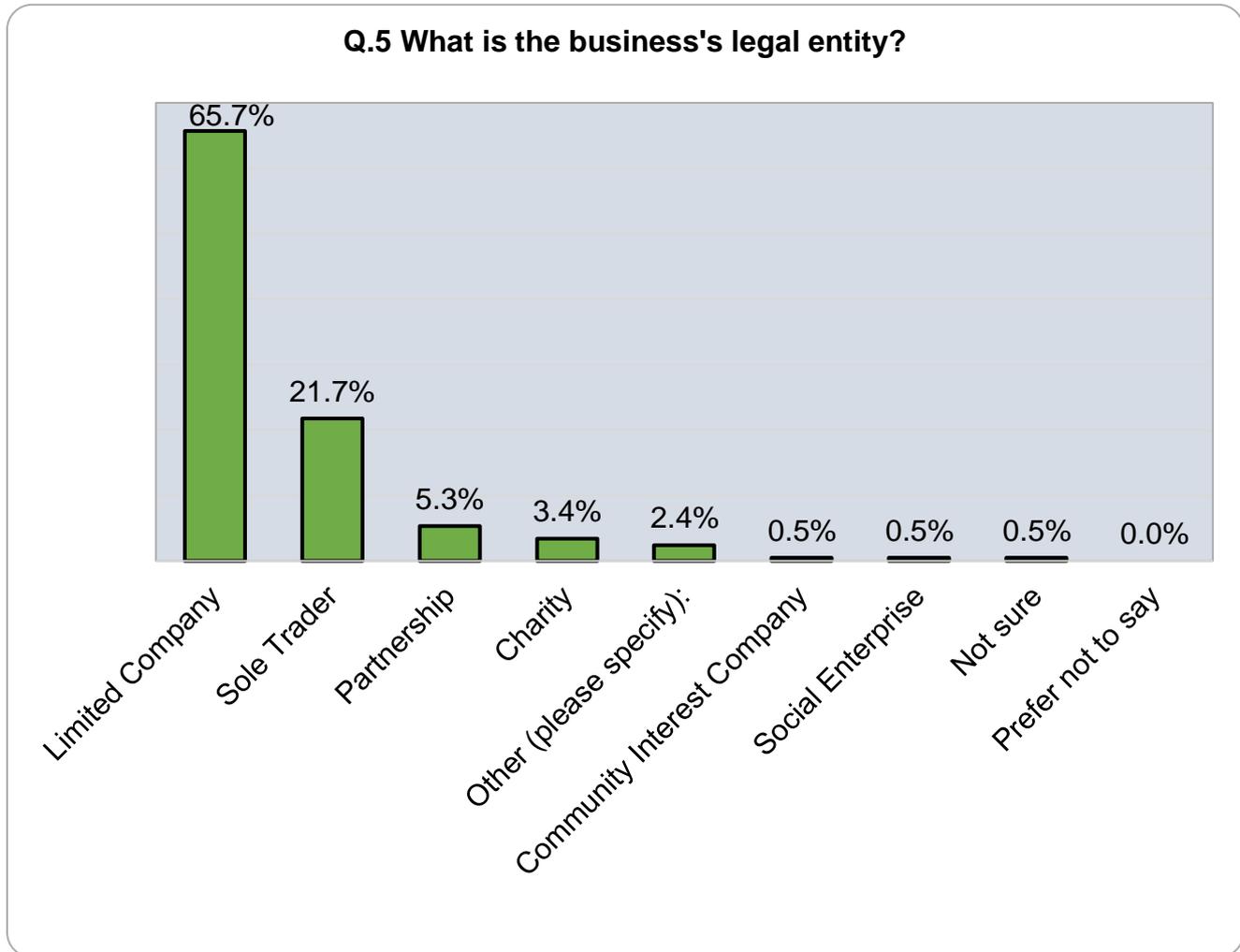
Over half of respondents (65%) stated that their business is based in South Oxfordshire.

33% of participants to the question are based in Vale of White Horse. Additionally, 4% of businesses are based outside of the districts, but trade within.

We anticipated these statistics as South Oxfordshire contains a higher population of registered businesses, in comparison to the Vale of White Horse district.

What is the business's legal entity?

Respondents were asked what industry their business's legal entity is. The question received a 100% response rate.



An overwhelming majority of businesses who responded to this question (68%) stated that they are a Limited Company. The second most common answer was 'Sole Trader', totalling 22% of responses.

5% of respondents categorised themselves as a partnership company, with a further 3% identifying as a charity.

Just 1% of participants are a Community Interest Company, while an additional 1% mentioned that they are a Social Enterprise. Another 1% of respondents said that they are unsure of which category their business falls into.

Furthermore, 2% of respondents cited other responses to the question.

The range of business type is broadly in synch with what we know about business type for the districts.

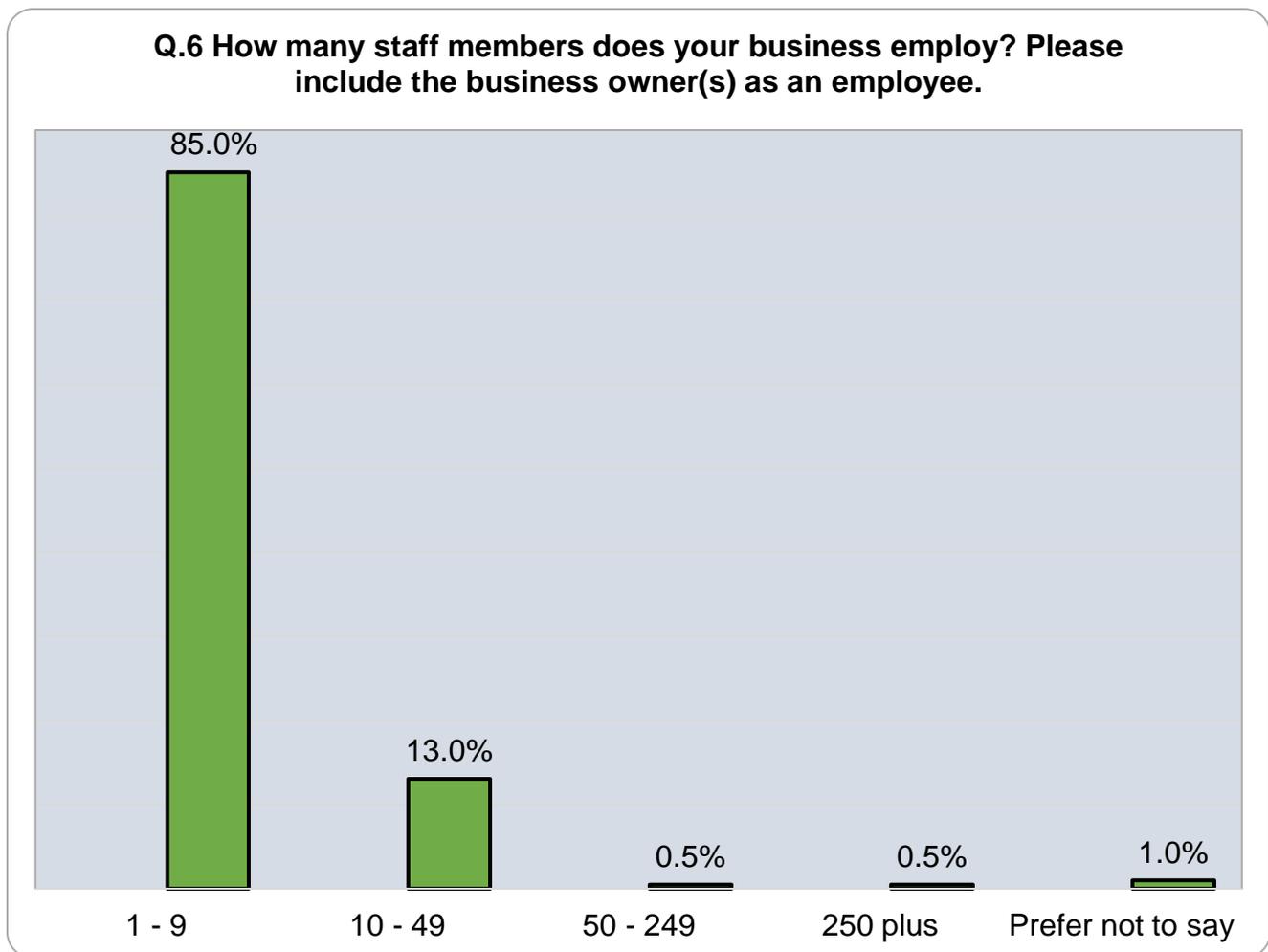
In 'other' answers

Of these additional answers, 83% (2 participants) stated that their business has multiple legal entities.

Other entities recorded were Self Employed, Public Sector and Ltd.

How many staff members does your business employ? Please include the business owner(s) as an employee.

Participants were asked how many staff members their business currently employs. The question received a 100% response rate.



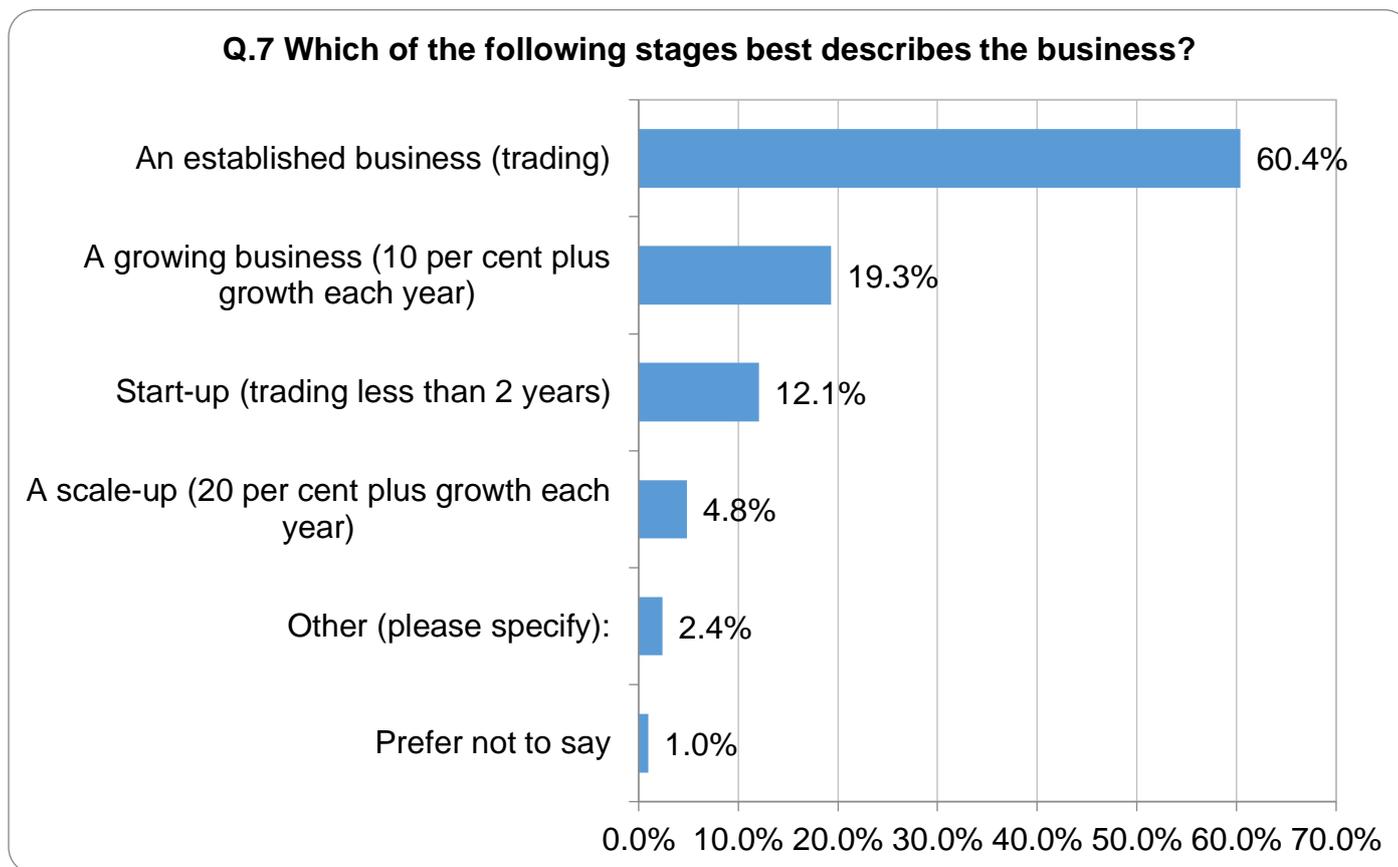
At 85%, the vast majority of respondents stated that they employ 1-9 staff members, including the business owner(s) as an employee. A further 13% of businesses employ 10-49 employees.

Just 1% of businesses said that they employ 50-249 employees, with a further 1% stating that they employ over 250 staff members.

1% of participants to the question opted not to disclose this information.

Which of the following stages best describes the business?

Respondents were asked which of the listed stages best describes the business. The question received a 100% response rate.



The two most popular answers to this question were an established business (60% of the businesses who contributed) and a growing business² making up 19% of responses.

12% cent of businesses identify themselves as a start-up³ and 5% of respondents described their business as a scale-up⁴.

1% of participants to the question opted not to disclose this information, and a further 2% mentioned other, non-listed stages.

In 'other' answers

Of the 2% who provided an alternative answer, 83% (2 people) described their business as a pre-launch start-up.

Other business stages recorded were established (but struggling), charity (long established) and multiple categories.

² 10% plus growth each year

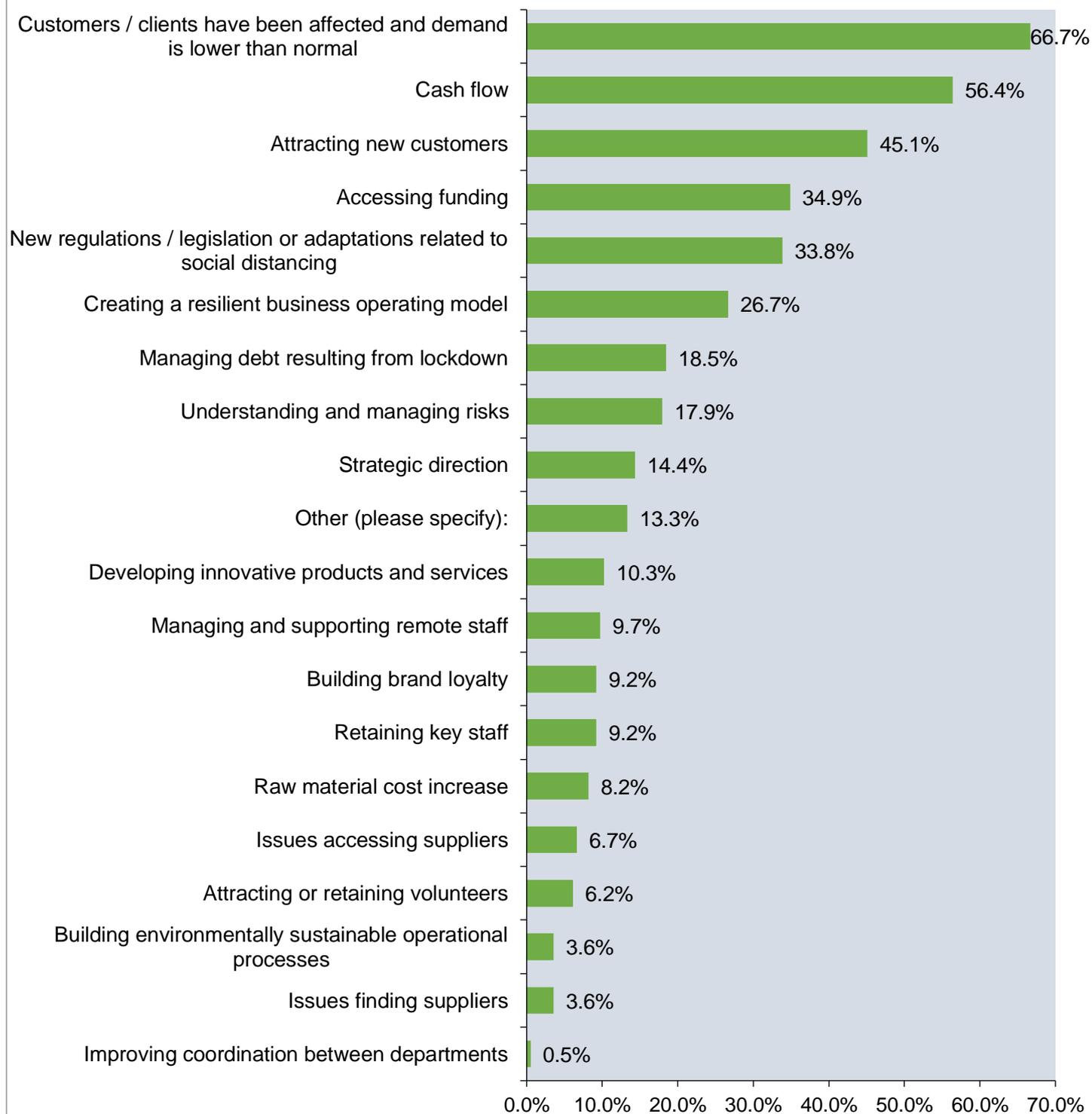
³ trading less than 2 years

⁴ 20% plus growth each year

What are the main challenges your enterprise currently faces, as a result of Covid-19? Tick all that apply.

The councils received 195 responses to this question. 94% of all the people who completed the survey provided an answer.

Q.8 What are the main challenges your enterprise currently faces, as a result of COVID-19? Tick all that apply.



The five most frequently cited challenges were:

1. Customers / clients have been affected and demand is lower than normal (cited in 66.7% of responses)
2. Cash flow (cited in 56.4% of responses)
3. Attracting new customers (cited in 45.1% of responses)
4. Accessing funding (cited in 35% of responses)
5. New regulations / legislation or adaptations related to social distancing (cited in 34% of responses)

13% of the contributions (26 respondents) suggested that they also faced 'other', non-specified, challenges as a result of Covid-19.

In 'other' answers

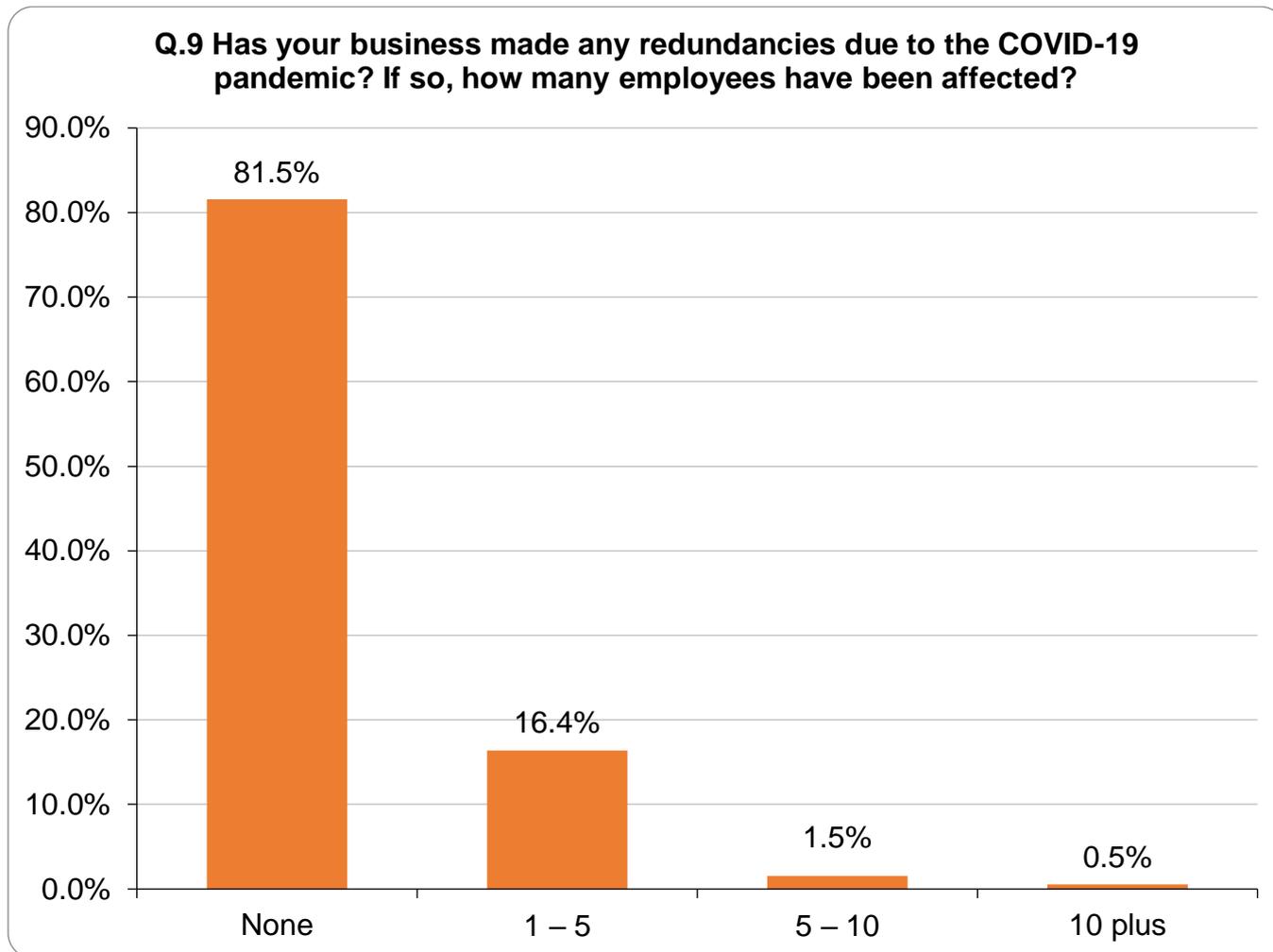
Of the 26 respondents who stated that they faced other challenges to those listed in the question, 42% highlighted the uncertain trading environment for their businesses. Many mentioned the impact of the current restrictions and how these were impacting upon their ability to function effectively. Several detailed how they were unable to operate at present and that they were unsure when/if they would be able to return to some form of normality. Others, more broadly, spoke of the current state of the economy and the degree of uncertainty about how the next few months would pan out.

A little under a fifth of respondents (19%) cited issues around funding and finance as a major challenge. While some mentioned the impact that the pandemic was having on their finances, others were disappointed that they did not qualify for any form of support – one person also said that current support schemes were focused upon survival and there was little in the way of grants for growth.

Has your business made any redundancies due to the Covid-19 pandemic? If so, how many employees have been affected?

The South and Vale Business Support team understand that under the current economic uncertainty, some businesses have had to make redundancies in order to keep the business afloat.

Respondents were asked if their business has made any redundancies due to the Covid-19 pandemic. 195 responses to this question were recorded, while 12 people chose not to answer.



A high percentage of respondents (82%) stated that they have not yet had to make any redundancies.

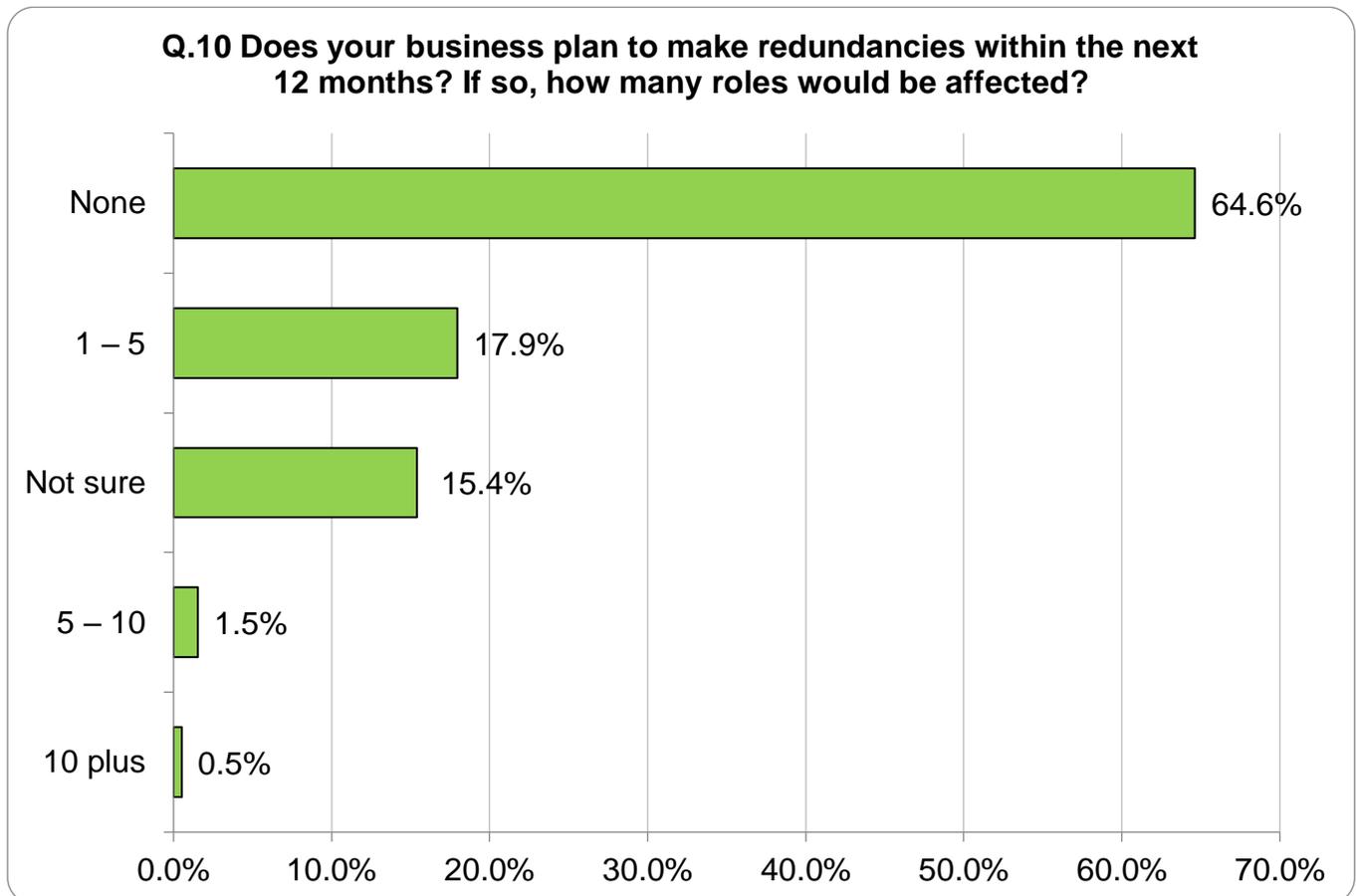
By contrast, 16% say that they have made between 1 and 5 redundancies so far. A further 2% have made between 5 and 10 redundancies.

1% of respondents have been forced to make over 10 redundancies.

Does your business plan to make redundancies within the next 12 months? If so, how many roles would be affected?

Respondents were asked if their business plans to make any redundancies within the next 12 months. We wanted to gain an understanding of how our local businesses are coping in the current economic climate.

94% of participants responded to this question, with 6% opting to skip to the next question.



Over half of respondents (65%) do not plan to make any redundancies within the next 12 months.

On the other hand, 18% of businesses say that they plan to make between 1 and 5 redundancies within the next 12 months, and a further 2% plan to make between 5 and 10 redundancies.

1% of respondents say that they will make over 10 redundancies within the next 12 months.

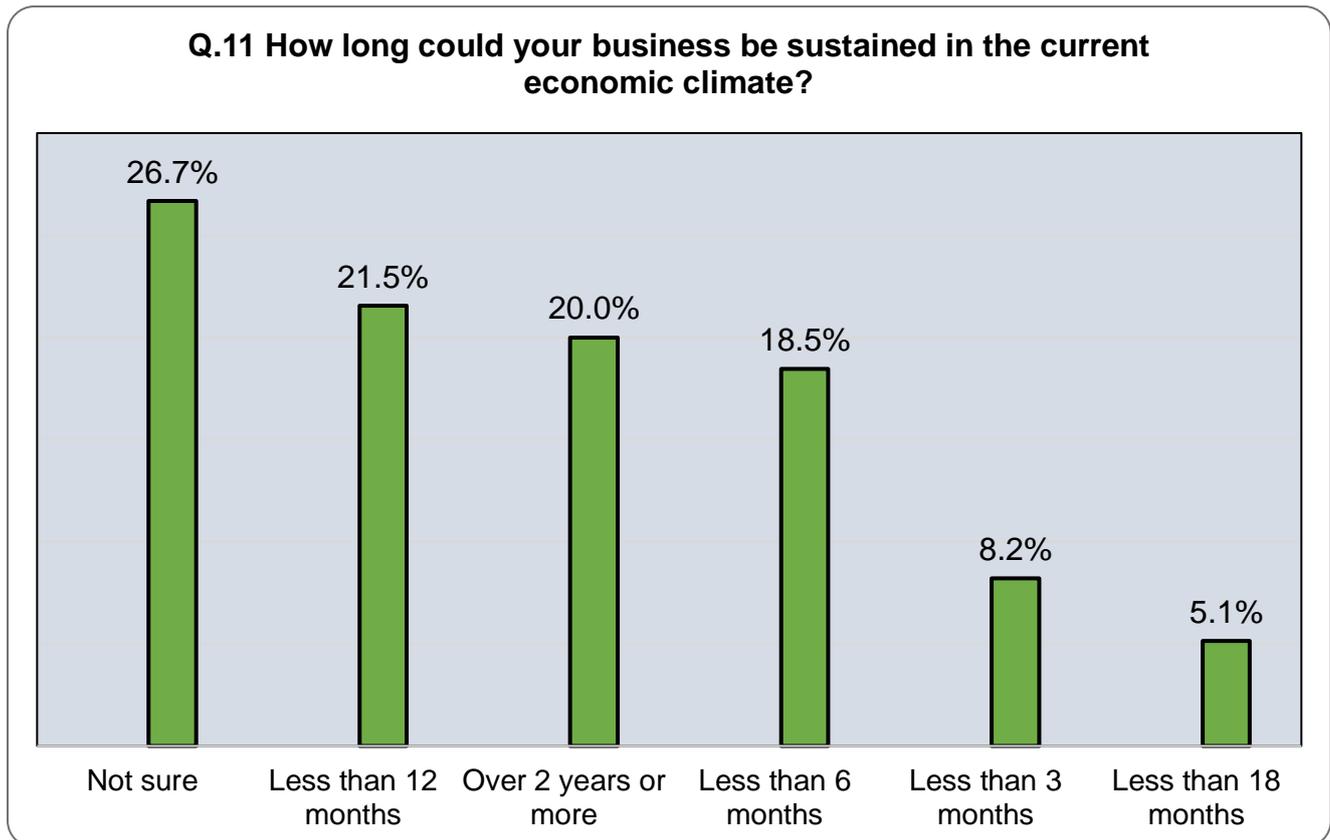
Finally, 15% of participants to the question have stated that they are not sure if they will make redundancies.

How long could your business be sustained in the current economic climate?

The South and Vale Business Support team have spoken to a range of local businesses since the beginning of the Covid-19 pandemic.

Participants were asked to give an estimate on how long their businesses could be sustained in the current economic climate.

We asked this question to gain an understanding of how our businesses are currently coping, and how long they can keep trading with the current resources available to them.



94% of participants responded to this question, with 6% opting to skip to the next question.

22% of participants could be sustained in the current economic climate for less than 12 months, and 19% of businesses would be able to operate for less than 6 months.

8% of respondents feel that they will be sustained for less than 3 months.

A further 5% believe that they can be sustained for less than 18 months.

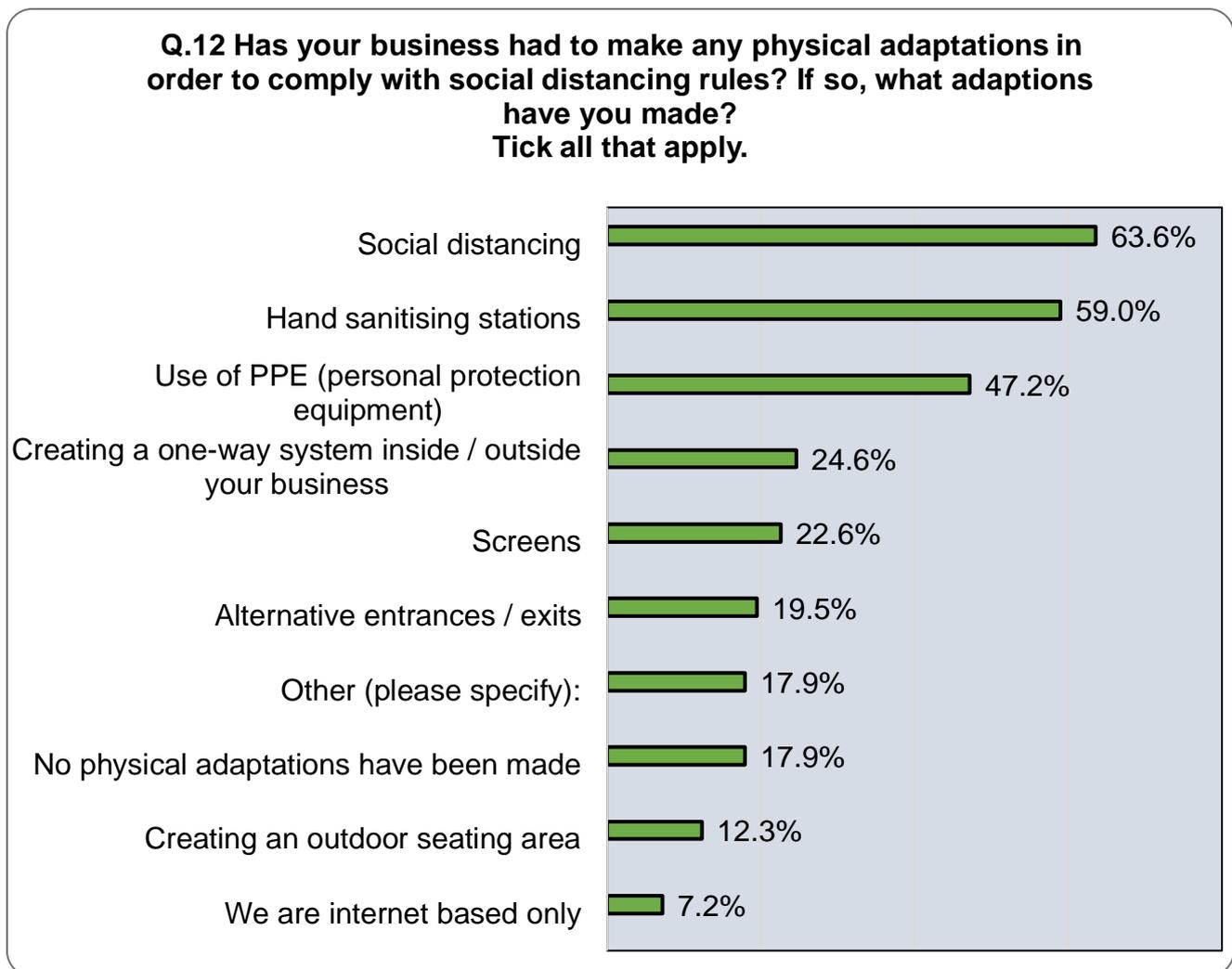
On the other end of the scale, 20% of businesses will be able to operate for over 2 years or longer.

Finally, 27% of respondents are not sure how long their business could be sustained for in the current economic climate.

These results suggest that over half of respondents would face significant trading issues within 18 months.

Has your business had to make any physical adaptations in order to comply with social distancing rules? If so, what adaptations have you made? Tick all that apply.

195 responses were received to this question (94% of all the people who completed the survey provided an answer).



The two most popular answers to this question were the enforcement of social distancing (undertaken by 64% of the business who replied) and the installation of hand sanitising stations (fitted by 59% of respondents). These were the only physical adaptations cited in more than half of the contributions.

A little under half of replies (47%) stated that their businesses had introduced PPE in order to comply with social distancing rules. Just under a quarter of respondents (25%) specified that they had introduced a one-way system inside/outside their business, while 23% had installed screens in order to adhere to the new regulations.

18% of contributions (35 people) mentioned that they had made other, non-specified, physical adaptations in order to comply with social distancing rules.

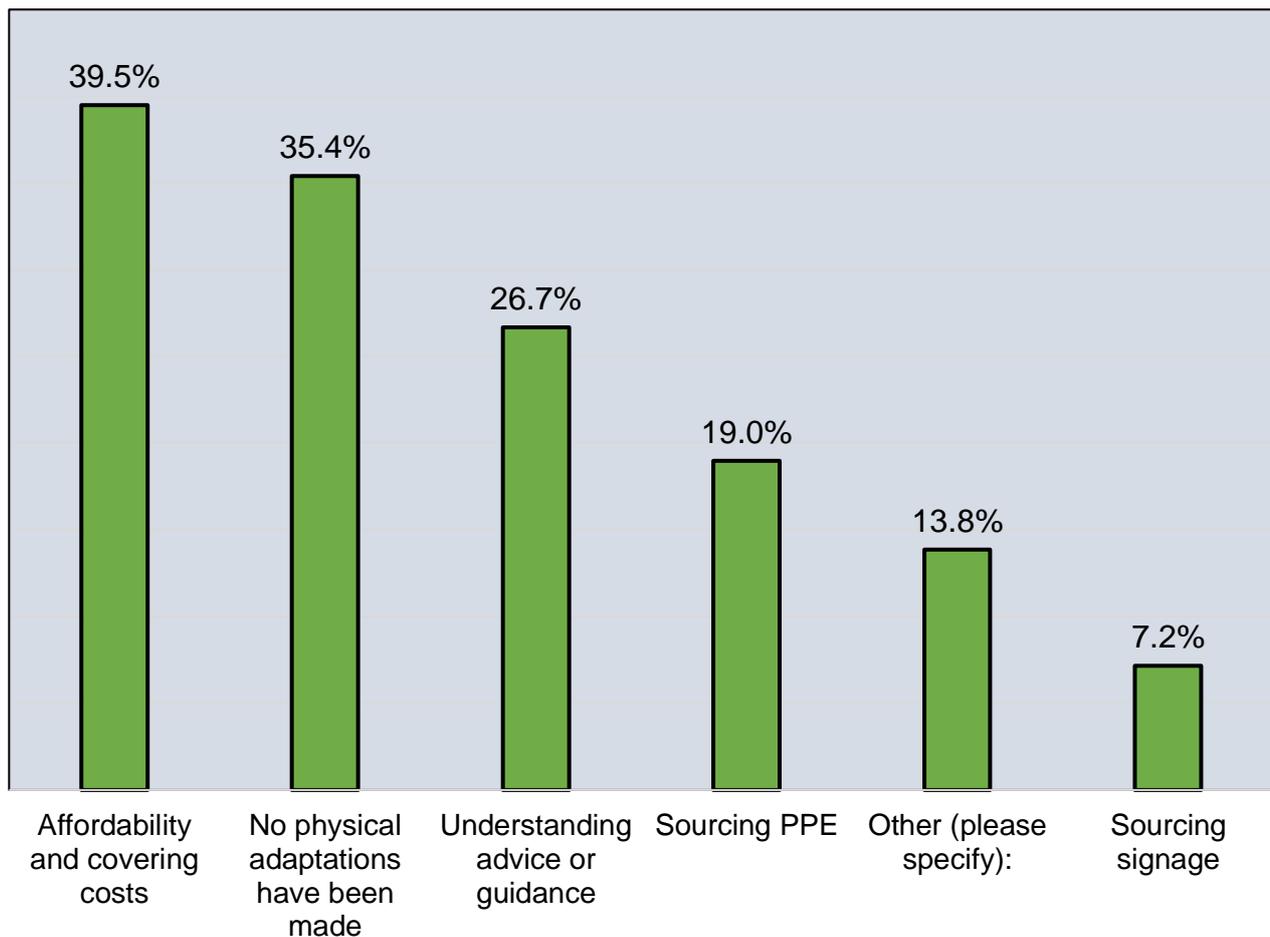
In 'other' answers

Of the 35 people who said that their businesses had introduced other forms of physical adaptation, 34% (12 respondents) stated that they had transitioned towards home/remote working in order to comply with social distancing regulations. While in some instances this now meant that offices and workplaces were now empty, in others it signified the introduction of restrictions on the number of people who could be on site at any one time (limits on staff numbers was another popular theme mentioned in 11% (4 participants) of responses).

23% (8 respondents) stated that they had not made physical adaptations as their businesses could not currently operate – many of these were in the events/hospitality industry.

If your business needed to make any adaptations, has your business experienced any difficulties in making them? Tick all that apply.

Q.13 If your business needed to make any adaptations, has your business experienced any difficulties in making them? Tick all that apply.



The councils received 195 responses to this question (94% of all the people who completed the survey provided an answer).

Just under 40% of replies cited the cost and affordability of making adaptations as one of the difficulties their business had experienced in making any adaptations. More than a quarter of respondents (27%) also highlighted problems with understanding the advice and guidance as a complication when introducing modifications.

19% of the responses alluded to issues around the sourcing of PPE as a challenge that their business had faced in making some of the necessary adjustments to cope with the pandemic.

14% of contributions (27 responses) mentioned that they had experienced other, non-specified, obstacles when making adaptations in order to comply with social distancing rules.

35% of respondents, however, stated that they had not made any adaptations as a result of the pandemic and had, therefore, not experienced any difficulties in this area.

In 'other' answers

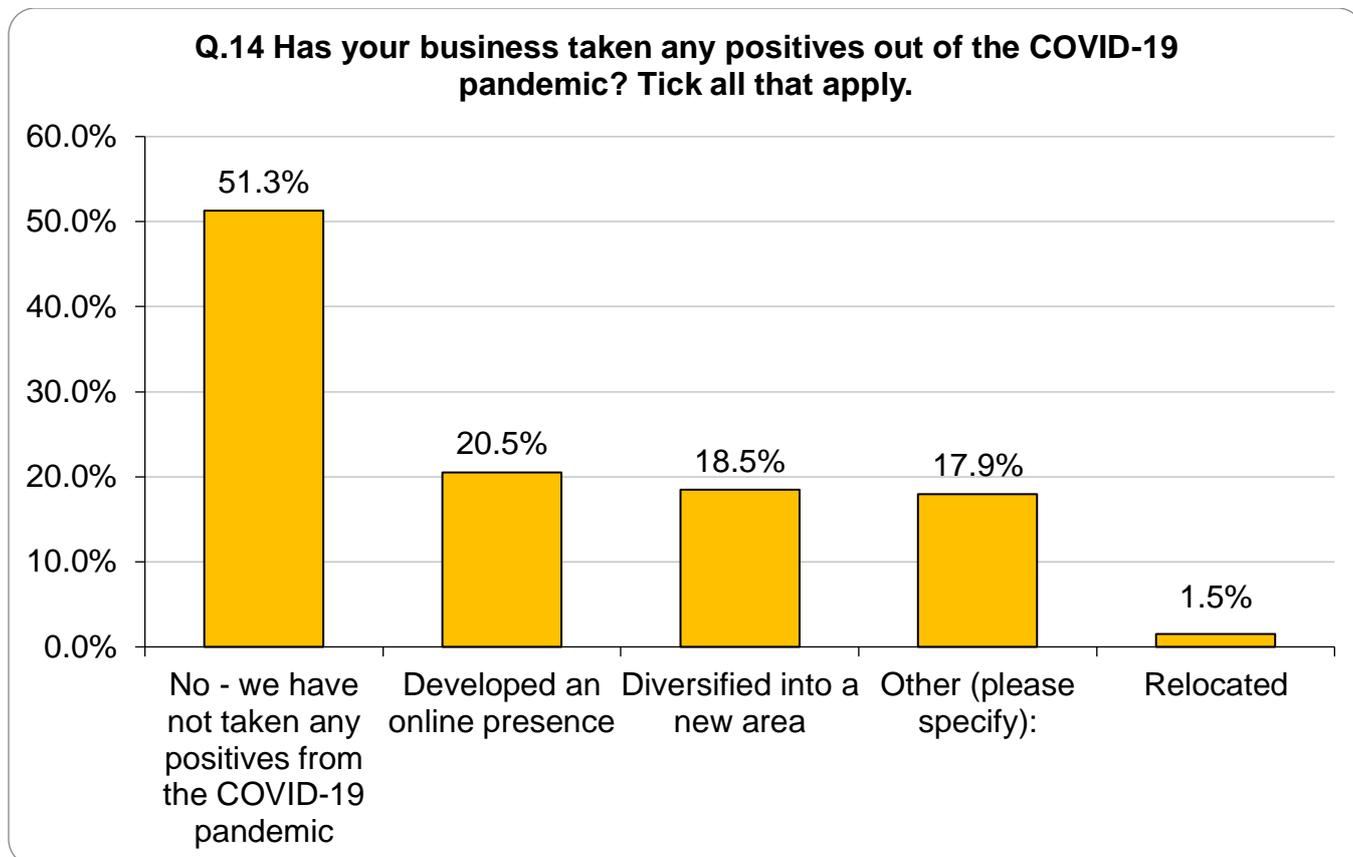
Of the 27 people who ticked other in response to this question, 33% (9 participants) said that while they had made adaptations to their businesses, they had not experienced any difficulties in making these changes.

Other respondents highlighted issues around:

- building constraints (limited access, older property etc.)
- keeping up with the frequent changes in guidance
- a lack of communication from both local and national government
- adapting to new ways of working

Has your business taken any positives out of the Covid-19 pandemic? Tick all that apply.

The councils received 195 responses to this question (94% of all the people who completed the survey provided an answer).



Over half of the replies (51%) stated that they had taken no positives from the pandemic. This was by far the most popular option ticked in response to this question.

Some businesses, however, told us they have taken positives out of the pandemic. Around a fifth (21%) of respondents mentioned that the pandemic had led them to develop an online presence. While 19% of respondents said that, as a result of Covid-19, their businesses had diversified into new areas.

18% of the replies (35 people) suggested that they had taken other, non-specified, positives out of the pandemic.

In 'other' answers

Of the 35 people who said that they had taken other positives out of the pandemic, 17% stated that it had allowed them to adapt their business practices. For some this has meant streamlining processes to improve efficiency and flexibility, while for others it has been about embracing and utilising modern technology – for example, in relation to remote/home working (another popular theme cited in 9% of the responses).

11% of the contributions described how the pandemic had given them more time to think, innovate and skill-up. Many had taken the opportunity to reassess and evaluate their current business model/practices and see where they could improve and adapt. Linking into this, several replies mentioned how they had diversified or were looking to diversify in order to meet the challenges caused by Covid-19.

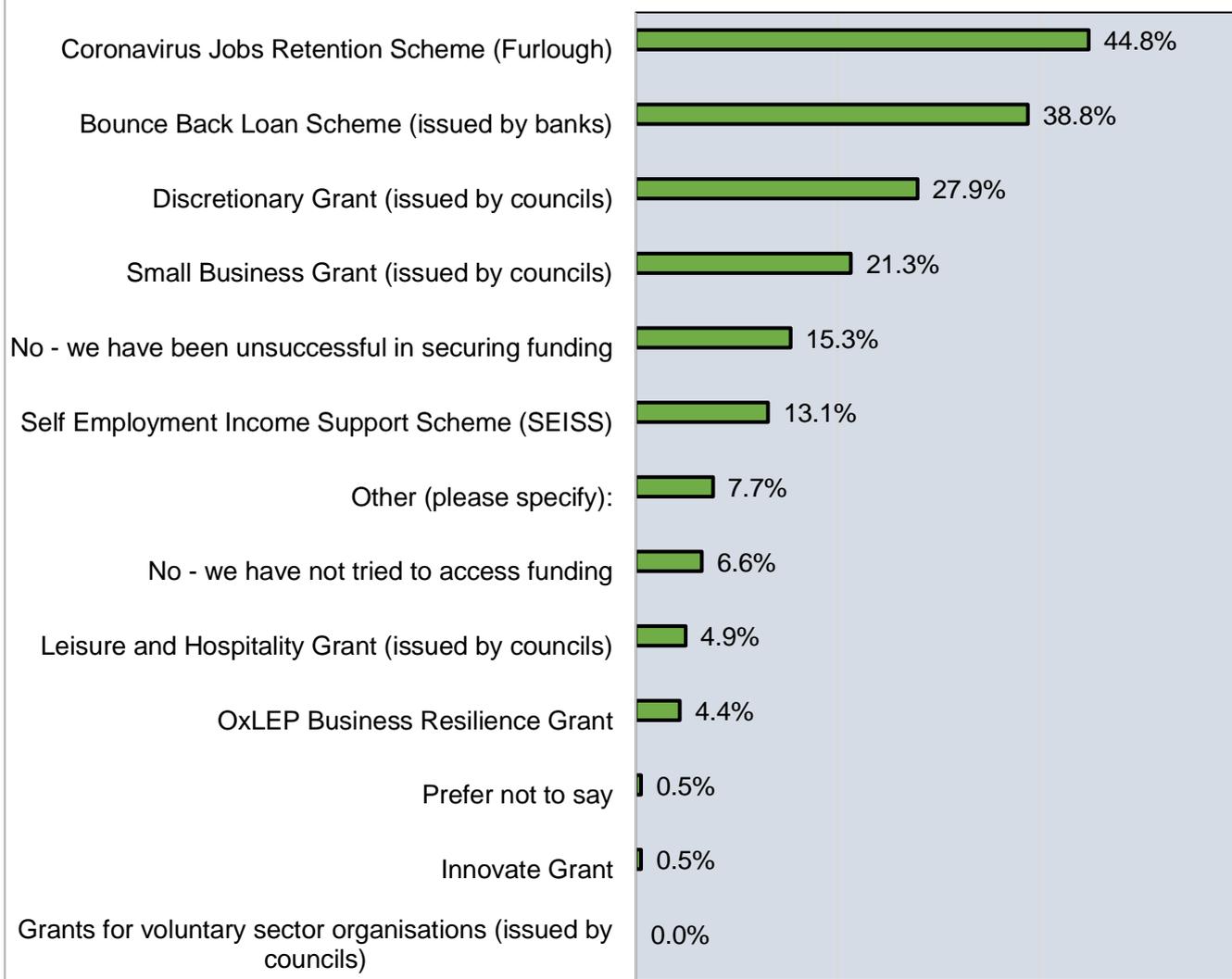
While for the majority of businesses the pandemic has had numerous negative impacts, for others (4 respondents) it has led to an increase in sales and revenue. A few of the respondents to this question detailed how the pandemic has led to them attracting more customers and selling more of their products/services.

Below are a few comments on other ways participants have managed to find the positives of the pandemic:

- *'During lockdown we took the opportunity to decorate and refit the shop which we hadn't been able to do while we were open and we couldn't afford to close so in some ways lockdown was beneficial.'*
- *'Found new customers whose suppliers could not meet their needs due to Covid.'*
- *'It has made us look at other areas to diversify, as the core business is currently hen weekend stays/birthday celebrations/group stays... we are looking at promoting family stays with a strong eco/sustainability ethos including healthy workspaces to hire and company away days/team building.'*
- *'We have learned to be more caring for our customers.'*

Has your business been able to access any of the following UK Government financial support during the Covid-19 crisis? Tick all that apply.

Q.15 Has your business been able to access any of the following UK Government financial support during the COVID-19 crisis? Tick all that apply.



The councils received 183 responses to this question (88% of all the people who completed the survey provided an answer).

Participants were asked if they had been able to access any of the listed grant schemes to help their businesses during the Covid-19 pandemic.

At 45%, the most common grant scheme accessed was the Coronavirus Jobs Retention Scheme (Furlough). As seen within the results of question 9, redundancies have so far been kept to a minimum with the support of this scheme.

Other popular schemes accessed include:

1. Bounce Back Loan Scheme (issued by banks) – 39%
2. Discretionary Grant (issued by councils) - 29%
3. Small Business Grant (issued by councils) – 21%
4. Self-Employment Income Support Scheme (SEISS) – 13%
5. Leisure and Hospitality Grant (issued by councils) – 5%
6. Oxfordshire Local Enterprise Partnership (OxLEP) Business Resilience Grant – 4%
7. Innovate Grant – 1%

15% of respondents were unfortunately unsuccessful in securing grant funding during, and a further 7% have not tried to access any of the listed funding schemes.

1% of participants preferred not to disclose this information. However, 7% cited other responses to the question.

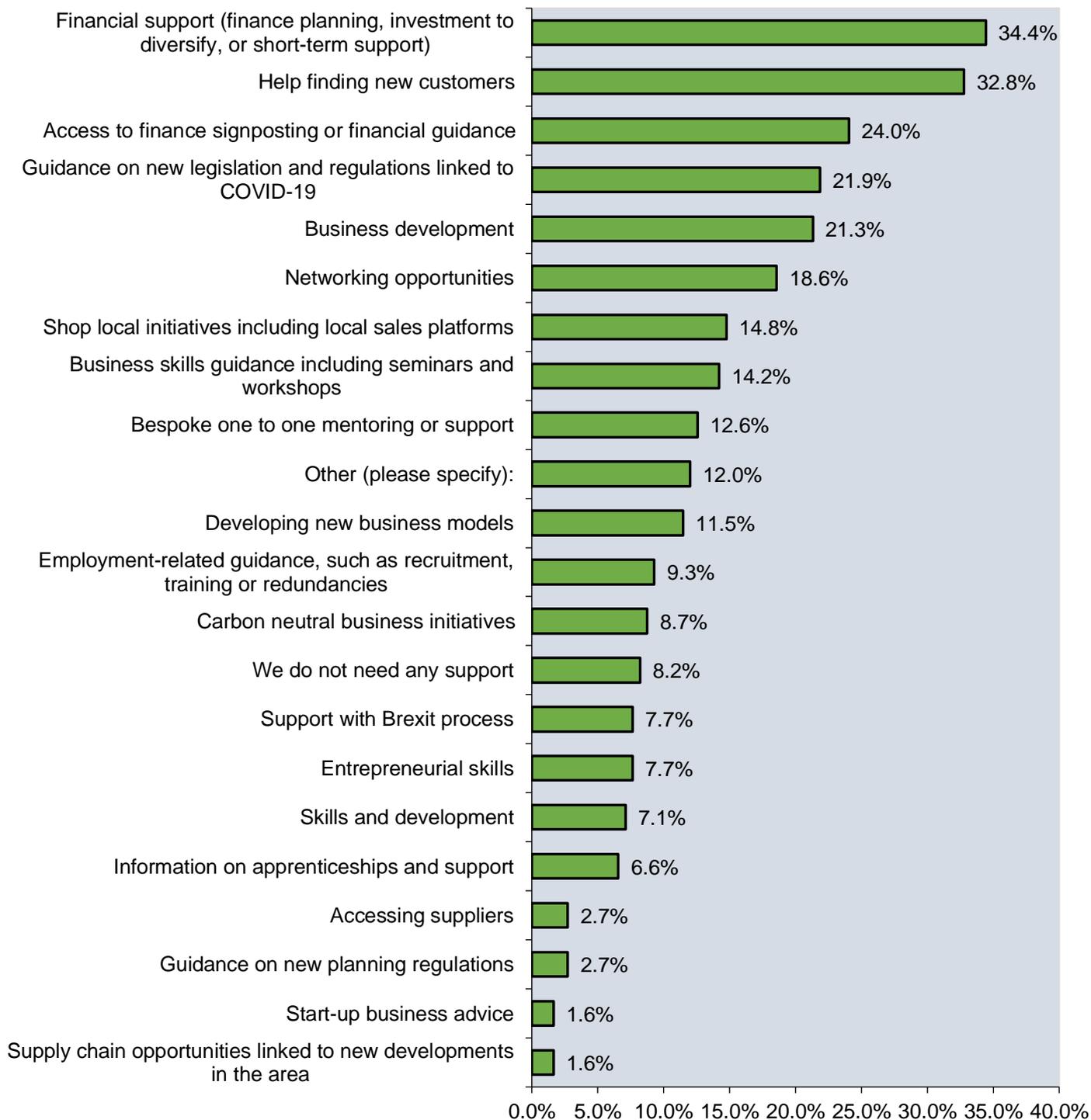
In 'other' answers

92% (7 respondents) of businesses told us that they are not eligible for any of the Covid-19 funding schemes.

However, other funding schemes that were not listed have been accessed, including the Prince's Trust, the National Lottery Covid-19 grant, other Government grant, Arts Council and the Eat Out to Help Out Scheme. Other responses indicated that there are applications outstanding and some have not accessed any funding to date but may visit this soon.

We are keen to find out what support businesses would find most valuable from South and Vale Business Support. Our limited resources mean that we may not be able to fulfil every request, but these responses will influence our work going forward. Thinking ahead between now and next spring, what support would make the biggest difference to your business? Please select up to five answers.

Q.16 Thinking ahead between now and next spring, what support would make the biggest difference to your business? Please select up to five answers.



The councils received 183 responses to this question (88% of all the people who completed the survey provided an answer).

The ten most frequently cited examples were:

- 1) Financial support (finance planning, investment to diversify, or short-term support) – 34%
- 2) Help finding new customers – 33%
- 3) Access to finance signposting or financial guidance – 24%
- 4) Guidance on new legislation and regulations linked to Covid-19 – 22%
- 5) Business development – 21%
- 6) Networking opportunities – 19%
- 7) Shop local initiatives including local sales platforms – 15%
- 8) Business skills guidance including seminars and workshops – 14%
- 9) Bespoke one to one mentoring or support – 13%
- 10) Developing new business models – 12%

These were only the only programmes/projects that appeared in 10% (or more) of responses.

8% of respondents stated that they required no support from the councils.

12% of the contributions (22 people) suggested other, non-specified, support that they would like to see offered by South and Vale.

In 'other' answers

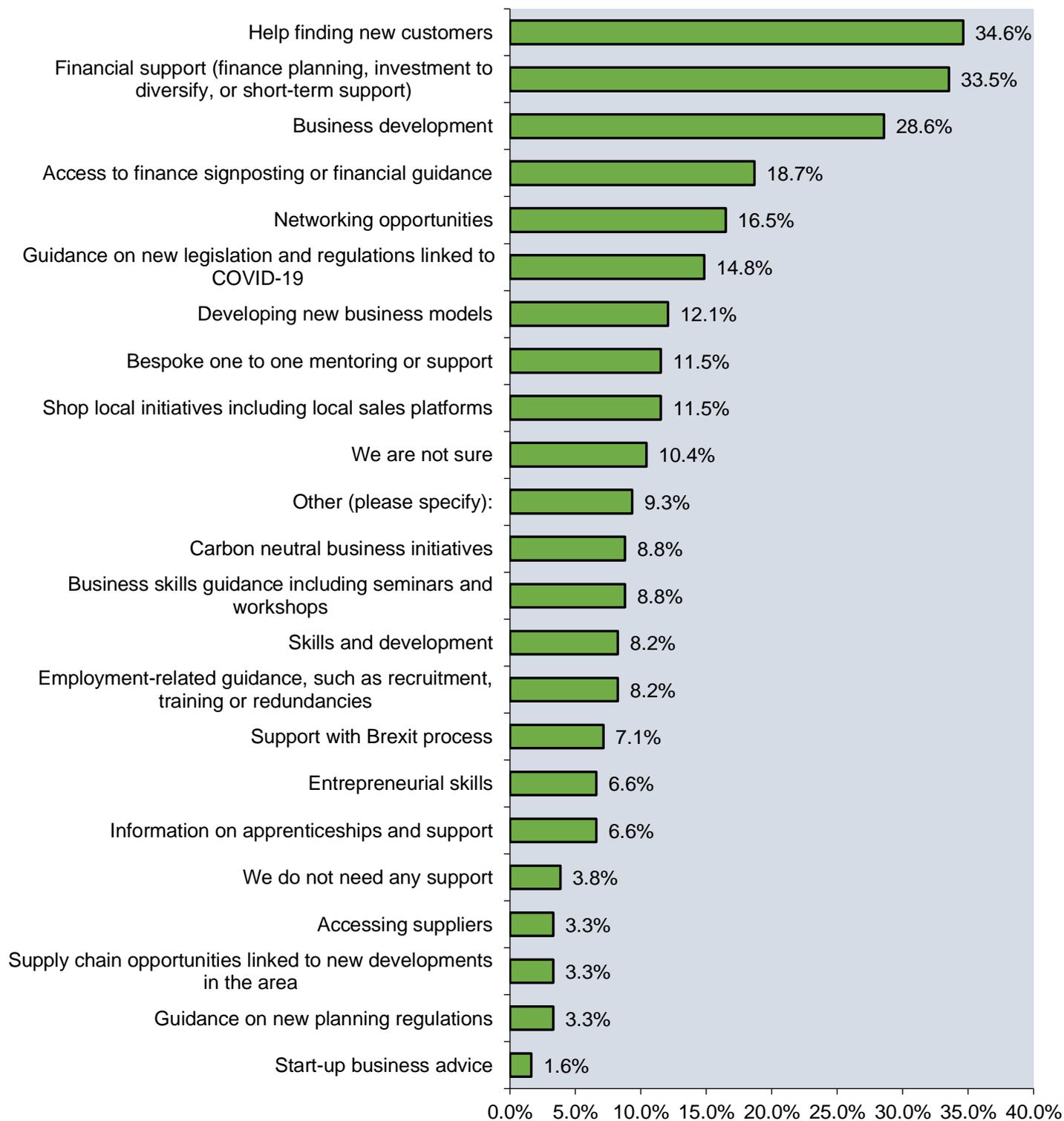
Of the 22 people who suggested alternative forms of support, 46% wished to see some form of grant, subsidy or other type of funding provided by the councils. While for some this would provide a lifeline to keep them operational, others wanted assistance to take-on additional staff, buy equipment, invest in new offices/buildings and/or grow their business.

Just under 10% of respondents asked for the councils to do more to open venues and facilities – for some businesses the enforced closure of their former workplaces was having a detrimental impact upon their livelihoods. A similar proportion of respondents also wanted the councils to provide more information to businesses on matters such as the Covid-19 guidelines and the availability of grants and other forms of funding.

From summer 2021 onwards, what support would make the biggest difference to your business? Please select up to five answers.

The councils received 183 responses to this question (88% of all the people who completed the survey provided an answer).

Q.17 From summer 2021 onwards, what support would make the biggest difference to your business? Please select up to five answers.



The support offers which featured most prominently (occurring in at least 10% of responses) were:

- Help finding new customers – 35%
- Financial support (finance planning, investment to diversify, or short-term support) – 34%
- Business development – 29%
- Access to finance signposting or financial guidance – 19%
- Networking opportunities – 17%
- Guidance on new legislation and regulations linked to Covid-19 – 15%
- Developing new business models – 12%
- Shop local initiatives including local sales platforms – 12%
- Bespoke one to one mentoring or support – 12%

10% of responders said that they were unsure of what support would make the biggest difference to their business.

4% of respondents stated that they did not require any support.

9% of the contributions (17 people) suggested other, non-specified, support that they would like to see offered.

In 'other' answers

Of the 17 people who suggested alternative forms of support, 41% believed that the biggest support to their business would be provided by a reduction in the current Covid-19 regulations. Many said that they were unable to operate/are restricted in their current operations and that only a lessening of some of the more prohibitive rules (e.g. around events) would provide a boost to their companies.

18% of the respondents also requested that the councils provided more expert advice and expertise as part of their support for business. While some wanted help on overseas sales, others suggested help in relation to financial reporting and (considering Brexit) freight and customs processes.

Are you aware of the following support available to you via South and Vale Business Support? Please ensure you provide your email address at the end of the survey if you would like to find out more.

Question 18 of the survey asked respondents to indicate to what extent they are aware of the support available to them through the South and Vale Business Support Team, and whether they had used, or were currently using, some of their services.

The overall results for each of the eight services offered by the Business Support Team are shown in the table below. The orange shading indicates one or more services of which a high proportion of respondents were not aware or were aware but had not used them. The orange shading also indicates the least used of the services in the past by respondents who were aware of some or all of them. The green shading instead indicates those services which a high proportion of respondents have used in the past, are currently using, or are interested in learning more about.

18. Are you aware of the following support available to you via South and Vale Business Support? Please ensure you provide your email address at the end of the survey if you would like to find out more.						
	We are not aware	We are aware, but have not used	We've used it in the past	We are currently using	We'd like to find out more	Response Total
Digital skills seminars	50.5% (99)	31.6% (62)	3.1% (6)	1.5% (3)	13.3% (26)	196
Bespoke one-to-one advice and support	49.2% (97)	29.4% (58)	8.6% (17)	2.0% (4)	10.7% (21)	197
Accessing superfast broadband	57.8% (115)	14.1% (28)	0.5% (1)	11.6% (23)	16.1% (32)	199
Finding new premises for your business	65.4% (123)	22.3% (42)	1.6% (3)	3.2% (6)	7.4% (14)	188
Skills and employment	51.3% (98)	29.8% (57)	4.2% (8)	1.0% (2)	13.6% (26)	191
Relevant funding and grants	28.6% (57)	20.6% (41)	14.6% (29)	5.0% (10)	31.2% (62)	199
Networking and business breakfast events	41.5% (81)	30.3% (59)	10.8% (21)	5.1% (10)	12.3% (24)	195
Signposting to other useful organisations	48.0% (94)	27.0% (53)	5.6% (11)	1.5% (3)	17.9% (35)	196
					answered	182
					skipped	25

The services that the business community was asked to consider are the following:

- Digital skills seminars
- Bespoke one-to-one advice and support
- Accessing superfast broadband
- Finding new premises for your business
- Skills and employment
- Relevant funding and grants
- Networking and business breakfast events
- Signposting to other useful organisations

On average, 49% of respondents said they were not aware of any of the support services available to them, 36% said they were to some extent aware, and 15% said they would like to find out more about them.

Among the services offered by the Business Support Team, respondents seem to be particularly unfamiliar with four of them: 'Finding new premises for your business' (65% of respondents were not aware), 'Accessing superfast broadband' (58%), 'Digital skills seminars' (51%), and 'Skills and employment' (51%).

Of those respondents who were aware of all or some of the services, on average 26% said they had not used any of them, 6% said they had used one or some of the services in the past, and 8% said they were currently using at least one of them.

Of the respondents who said they were aware of services but had not used them, 32% said so of 'Digital skills seminar', and 30% of 'Skills and employment' and 'Networking and business breakfast events'. On the other hand, 'Relevant funding and grants' was the most common answer among respondents who had benefited from at least one of the services in the past (15%).

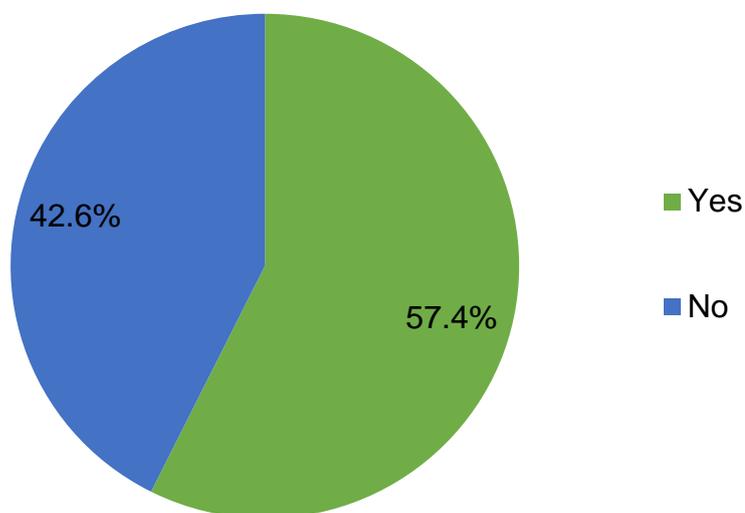
Interestingly, 'Accessing superfast broadband' was the least used of services in the past, with just 1% of respondents selecting this option, but also the most currently used one, with 12% of respondents saying they were using it at the time of writing.

Finally, among the respondents interested in knowing more about one or more services, 31% said so in regard to 'Relevant funding and grants', 18% selected 'Signposting to other relevant organisations', and 16% 'Accessing superfast broadband', thus highlighting the importance of the latter for the business community.

We have previously promoted online sales platforms including Locally UK and The Henley Basket, which encourage people to shop locally. Would an online sales portal/directory for South and Vale based businesses only be of interest to you? Please ensure you provide your email address at the end of the survey if you select 'yes'.

Respondents were asked if they would be interested in an online sales portal/directory for South and Vale based businesses.

Q.19 We have previously promoted online sales platforms including Locally UK and The Henley Basket, which encourage people to shop locally. Would an online sales portal/directory for South and Vale based businesses only be of interest to you?



85% of participants responded to this question, while 15% opted not to answer.

Over half of respondents (57%) responded 'yes' and provided their contact details, allowing us to reach out to them to talk about a future potential online sales portal for South and Vale based businesses.

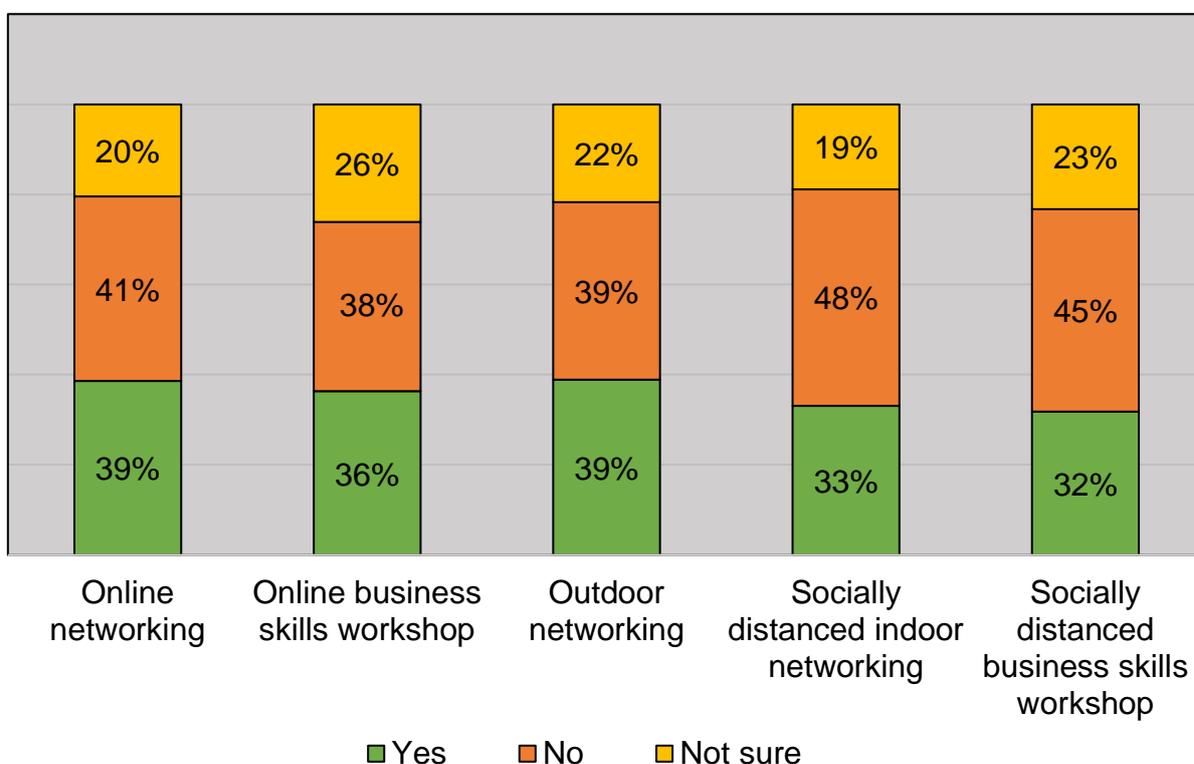
43% of participants told us that this would not be of interest to their business.

Would you be interested in attending any of the following? Please ensure you provide your email address at the end of the survey if you select 'yes'.

This question asked respondents to indicate whether they would be interested in attending one of the following workshops and networking events:

- Online networking
- Online business skills workshop
- Outdoor networking
- Socially distanced indoor networking
- Socially distanced business skills workshop

Q.20 Would you be interested in attending any of the following? Please ensure you provide your email address at the end of the survey if you select 'yes'.



On average, 36% of respondents said they would be interested in attending one or more of these events, against 42% who said they would not be interested and 22% who were not sure.

The two events which gained the most interest are 'Online networking' and 'Outdoor networking', which 39% of respondents said they would like to attend (see table above). These are followed by the 'Online business skills workshop' (36%), 'Socially distanced indoor networking' (33%), and 'Socially distanced business skills workshop' (32%).

Overall, respondents seem to prefer online or outdoor events rather than indoor ones. This might be due to fear of changes in the regulations relating to the containment of the Covid-19 pandemic, or to a reluctance to attend indoor events, although socially distanced ones.

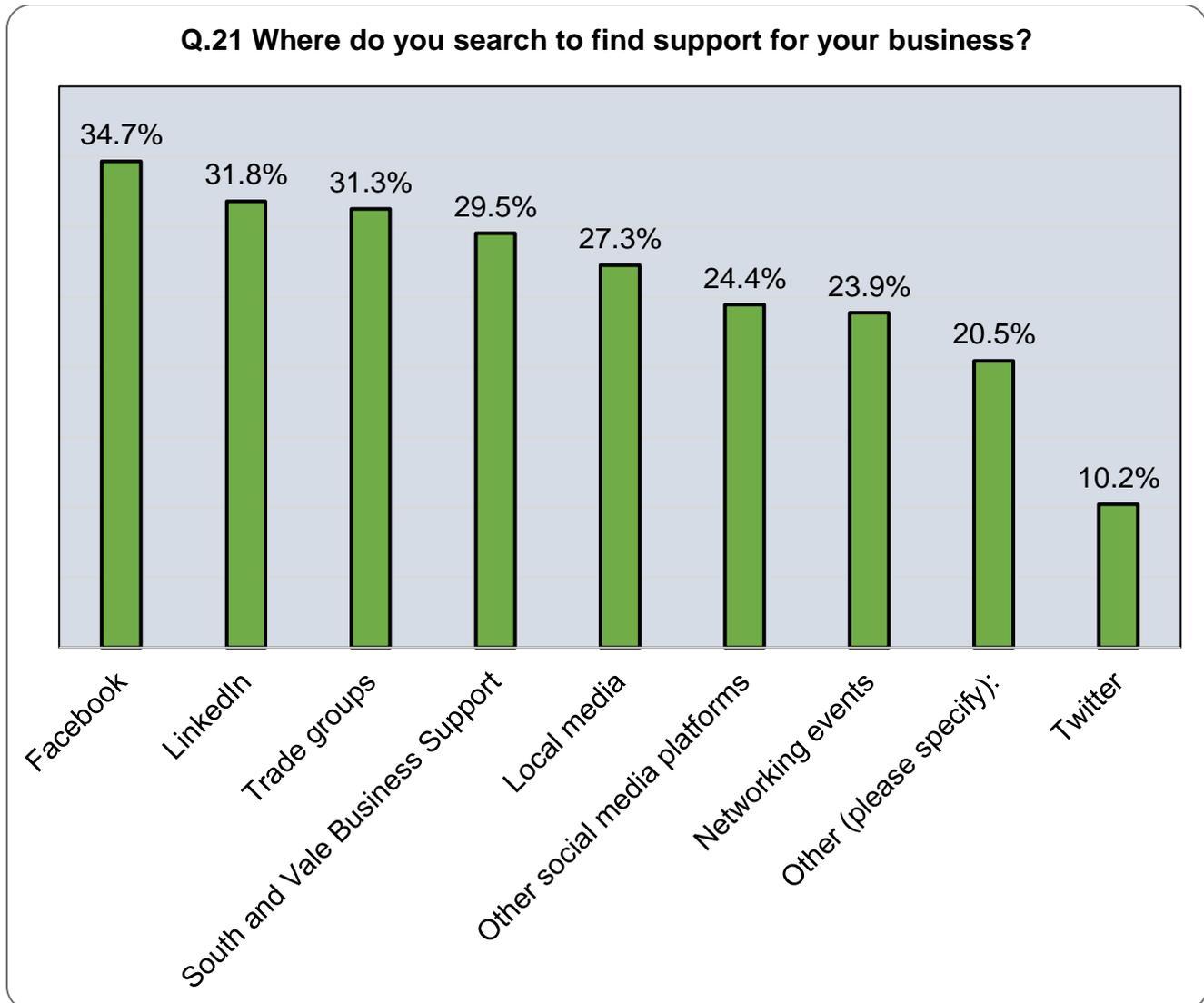
The events respondents are least interested in attending are 'Socially distance indoor networking' (48%), and 'Socially distanced business skills workshop' (45%).

Finally, 'Online business skills workshop' has seen the highest proportion of respondents who said they were not sure whether they would like to attend such event or not (26%), followed by 'Socially distanced business skills workshop' (23%) and 'Outdoor networking' (22%).

	Yes	No	Not sure
Outdoor networking	39%	39%	22%
Online networking	39%	41%	20%
Online business skills workshop	36%	38%	26%
Socially distanced indoor networking	33%	48%	19%
Socially distanced business skills workshop	32%	45%	23%

Where do you search to find support for your business?

Respondents were asked where they search to find support for their business. We currently promote events, relevant news and funding schemes through our Newsletter, and our Facebook and Twitter accounts. The results of this question will enable us to explore other platforms.



85% of participants responded to this question, while 15% chose to skip to the next question.

Each listed option scored highly on this question, with Facebook proving to be the most popular at 35%. Other popular answers included:

1. LinkedIn – 32%
2. Trade Groups – 31%
3. South and Vale Business Support – 30%
4. Local media – 27%
5. Other social media platforms – 24%
6. Networking events – 24%
7. Twitter – 10%

A further 21% of respondents cited other answers to the question, including alternative forms of support.

In 'other' answers

34% of people stated that they do not search for or need any support for their business, which was the most common alternative answer.

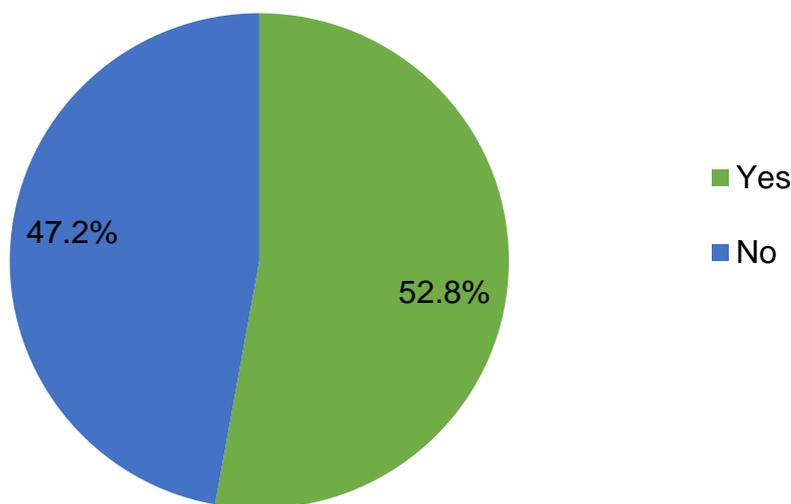
The second most popular answers were search engines and word of mouth, which each totalled 30%.

Other answers included an assortment of alternative business support sites and company resources.

Would you be interested in a one to one discussion with the South and Vale Business Support team to discuss the current issues your business is facing? Please ensure you provide your email address at the end of the survey if you select 'yes'.

Respondents were asked if they would be interested in a one to one discussion with the South and Vale Business Support team, to discuss the current issues their businesses are facing. This will allow us to decide on where to focus our resources as we begin to recover from the pandemic.

Q.22 Would you be interested in a one to one discussion with the South and Vale Business Support team to discuss the current issues your business is facing? Please ensure you provide your email address at the end of the survey if you select 'yes'.



176 responses to this question were recorded, while 31 people chose not to answer.

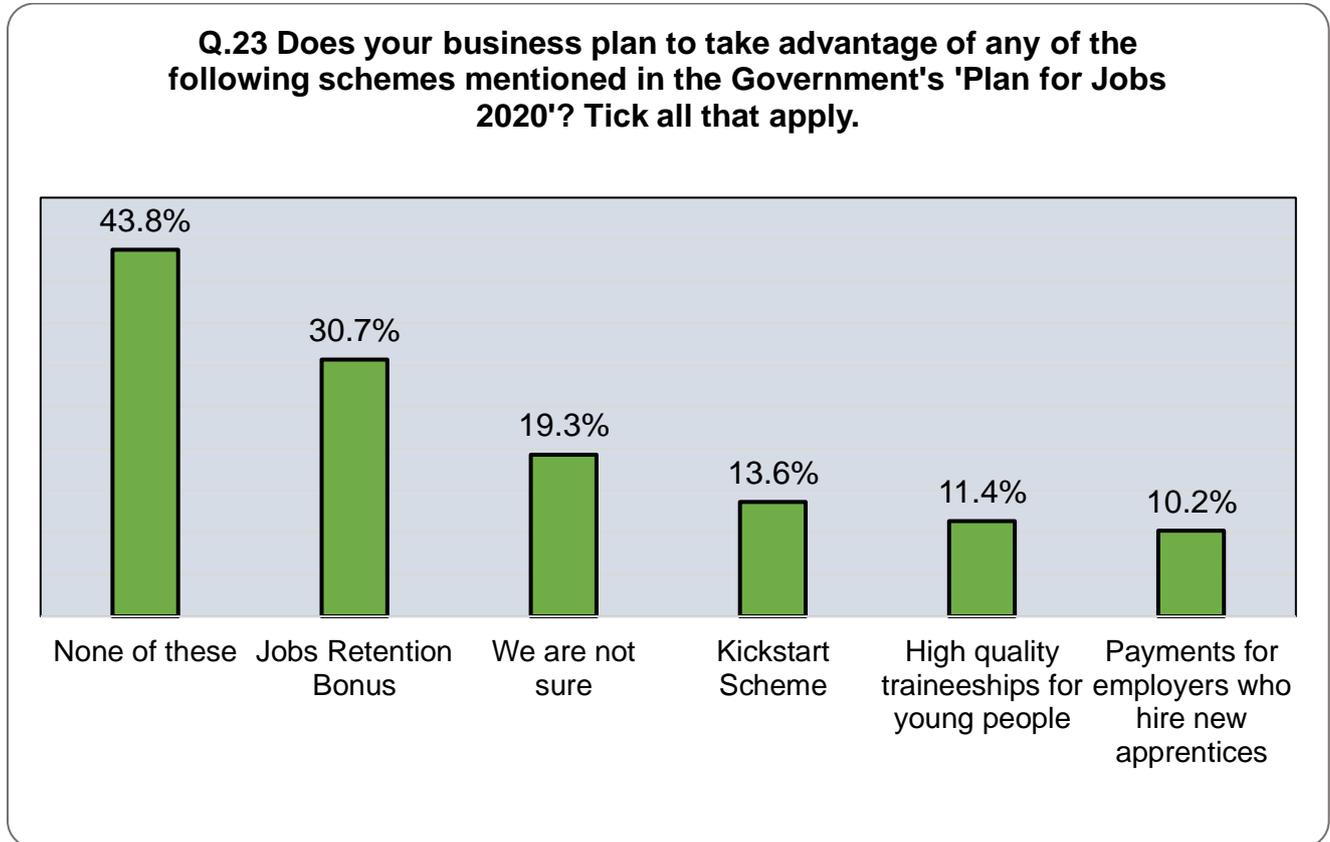
At 53%, over half of all respondents are interested in having a one to one discussion with the South and Vale Business Support team. These businesses provided us with their contact details, so that we can contact them about the support available.

47% of participants told us that this would not be of interest to their business.

Does your business plan to take advantage of any of the following schemes mentioned in the Government's 'Plan for Jobs 2020'? Tick all that apply.

We asked participants if their business plans to take advantage of any of the listed schemes mentioned in the Government's 'Plan for Jobs 2020'.

The question received an 85% response rate, while 15% opted not to contribute.



44% of businesses do not plan to take advantage of the schemes mentioned in the Government's 'Plan for Jobs 2020'. This could be due to a lack of promotion and suitability for the size of business responding. Additionally, further job support plans were announced during the survey's consultation period, which may have been better suited to businesses.

A further 19% of participants are not sure if they will take advantage of the schemes.

However, the most popular scheme is the Jobs Retention Bonus, totalling 31% of all answers. The Kickstart Scheme follows closely behind, with 14% of respondents planning to explore this.

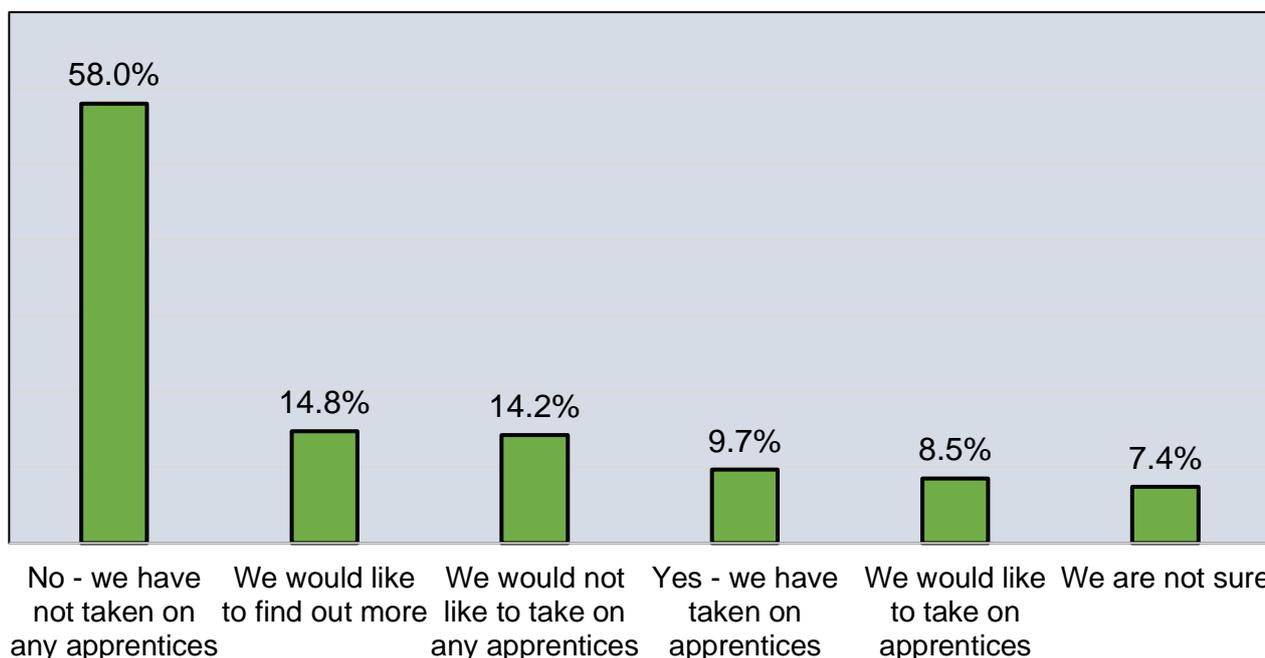
11% of businesses plan to look into the high-quality traineeships for young people, and 10% say they will take advantage of payments for employers who hire new apprentices.

Has your business taken on any apprentices, or do you plan to take on any apprentices? Tick all that apply. Please ensure you provide your email address at the end of the survey if you select 'yes'.

Respondents were asked if they have taken on any apprentices, and whether they are planning to take on apprentices in the future.

176 responses to this question were recorded, while 31 people chose not to answer.

Q.24 Has your business taken on any apprentices, or do you plan to take on any apprentices? Tick all that apply. Please ensure you provide your email address at the end of the survey if you select 'yes'.



The overwhelming majority of respondents (58%) say that they have not taken on any apprentices. Only 10% of respondents say that they have previously taken on apprentices.

14% of respondents would not like to take on any apprentices in the future, while on the other hand, 9% would like to take on apprentices.

15% of businesses would like to find out more about apprenticeships and have provided their contact details, so that we can get in touch with relevant information.

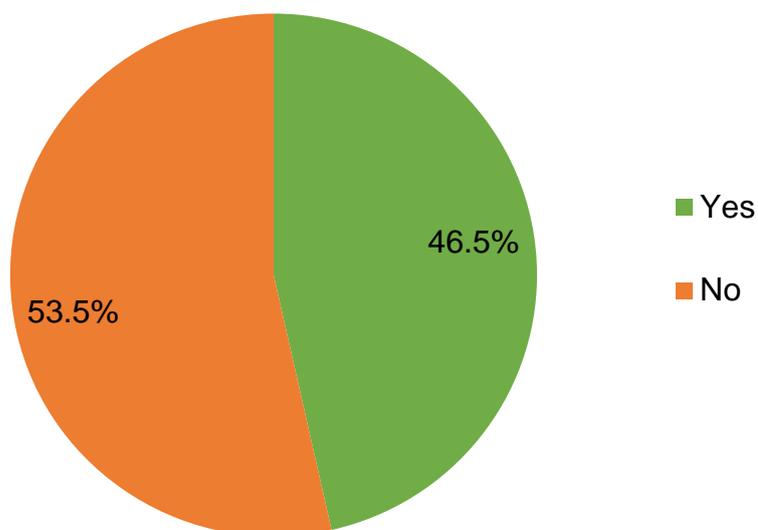
7% of participants are not sure whether taking on apprentices is the right thing for their business, which indicates that there is a lack of information about apprenticeships and their benefits available.

The councils have previously taken on a number of apprentices and would be happy to speak to businesses who are interested in the scheme.

Would your business like to contribute to ongoing recovery plans as part of a focus group or similar initiative? Please ensure you provide your email address at the end of the survey if you select 'yes'.

The South and Vale Business Support team are eager to hear the views of our local businesses and allow them to get involved with planning our future direction. Being a part of a focus group or a similar initiative will enable businesses to advise the team on where we should focus our resources.

Q.26 Would your business like to contribute to ongoing recovery plans as part of a focus group or similar initiative? Please ensure you provide your email address at the end of the survey if you select 'yes'.



170 responses to this question were recorded, with just over half (54%) stating that this would not be of interest to their business.

47% of participants think that this would be useful for their business.

Would you like to be informed when the final report is published on our website? Please ensure you provide your email address at the end of the survey if you select 'yes'.

We asked whether participants would like to be informed when the final report is published on our website, so that they can see the findings.

170 responses to this question were recorded, while 37 people chose not to answer.

An overwhelming majority of respondents (82%) stated that they would like to be informed when the final survey report is published on our website.

Just 20% of participants said that this would not be of interest to their business. These businesses have provided their contact details, so that we can get in touch when the report is published.

28. Do you agree to opt-in to receive marketing material from South and Vale Business Support through our newsletter and via email? (We will use your information to send you regular updates and information on any services or promotions that may be of interest to you. You will have the opportunity to opt-out of receiving communications from us every time we contact you.) Please ensure you provide your email address at the end of the survey if you select 'yes'.

Participants were asked if they would like to opt-in to receive future marketing material from South and Vale Business Support, through our newsletter and via email. This question received an 82% response rate.

80% of respondents said that they would like to opt-in. This is a strong sign that our marketing strategies throughout the pandemic have secured uptake.

Just 20% of participants opted out of this, and therefore will not be informed of any upcoming events or opportunities directly but might hear of initiatives through social media campaigns.

29. If you have selected 'We'd like to find out more' or answered 'yes' to the questions above or would like to be contacted about any of the opportunities mentioned in this survey, please provide your contact details below.

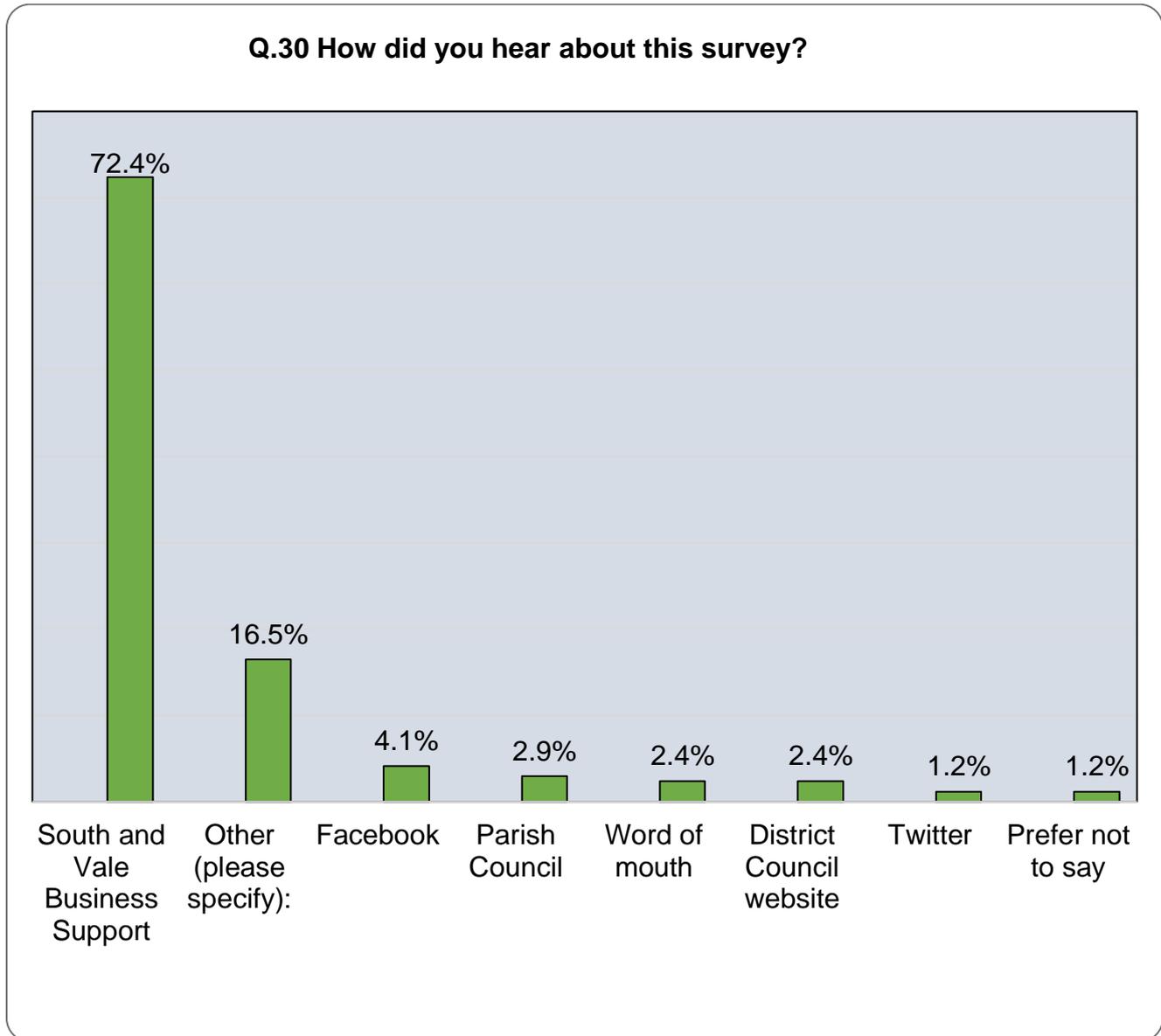
There were several questions throughout the survey that asked respondents to leave their details if they saw an opportunity that they would like to find out more about.

Of the 143 respondents who clarified that they would like to opt-in to receiving information about these opportunities, 100% of them left their contact details so that we can get in touch about their chosen topics.

88% chose to also supply us with their business name, giving us more context on their business and how they are operating in the current economic climate. It allows more detailed research to be undertaken, like website searches, so we can really get a feel for the business and how we can help.

How did you hear about this survey?

The last question asked respondents how they had heard about the Business Recovery survey.



Below are the options they could choose from:

- South and Vale Business Support
- Other (please specify):
- Facebook
- Parish Council
- Word of mouth
- District Council website
- Twitter
- Prefer not to say

The vast majority of respondents said they had heard about the survey from the Business Support Team (72%). Of the remaining 28% of respondents, 17% selected the option 'other'

and then indicated LinkedIn (18%) and email (18%) as the most common, alternative ways they had come to know about the survey. Moreover, 14% of those who selected 'other' said they had heard of the survey from the South and Vale Business Support Team, and another 14% from Tourism South-East.

Finally, 4% of respondents found out about the survey on Facebook, 3% were informed by their Parish Council, 2% each learnt of it on the South and Vale district councils' website and by word of mouth, and 1% on Twitter. Only 1% of respondents preferred not to disclose any source.

If other, please specify:

- LinkedIn x 5
- Email x 5
- Email from South & Vale Business Support (*South and Vale district councils Business Support Team*) x 4
- Tourism South east x 4
- Acquaintance forwarded
- Harwell newsletter
- GoActive
- Go Active Gold
- Didcot Chamber of Commerce
- Friend sent link
- Town Council Business Forum
- Henley Town Council
- Phone call to SODC (*South Oxfordshire district council*)
- Our landlord

KEY FINDINGS – QUALITATIVE DATA

The survey allowed responders to provide comments to the free text question, 'Is there anything else you'd like to tell us, which you feel is important for us to know?' A range of different comments and suggestions were made, and a summary of the key findings is below.

Some spelling, grammatical and punctual errors in the original comments have been corrected in this report. A full unedited list of all comments raised can be found at Appendix F.

67 responses were received by the council in relation to this question. Although there was a wide degree of variation in the detail and content of the answers, certain topics and themes reoccurred throughout.

Frequency of comments raised to 'is there anything else you'd like to tell us, which you feel is important for us to know?'

Comment type	Frequency
Unable to access funding	20
Fears for the future	17
Support has helped - furlough/grants	14
Government regulations	12
Help from district council appreciated	12
Events and hospitality	9
Business Rates	3
Lack of info/muddled guidance	3
Slow response from the councils' business rates team	2

Unable to access funding

Just under 30% of respondents were upset/angry that they had been ineligible for either central or local government support. Many believed that they had been allowed to fall through the cracks while other businesses had received assistance. (The majority of these appear to be people who did not meet the eligibility criteria).

Examples of some of the comments include:

- I am very angry. I have paid corporation and other taxes since I established the business in 1995. As I work onsite with clients or from home, I have no business rated premises or business rent. I have to be a Ltd Co for insurance purposes. Consequently, I get NO central or local government grant and NO 80% of earnings like the employed or self-employed. It's a ****ing (sic) disgrace.*
- My business has been excluded from all support, including discretionary grants, due to being home based and having no employees. I was also excluded from the self-employment grant as I started in January 2019 but earned more in my previous employment in 2018. Support should be available for us who have fallen through the gaps.*

- *I am one of those start-up businesses that was not eligible for any national or local Covid-19 funding schemes, so I feel I have been completely alone in facing this crisis. Luckily, I am doing ok-ish, but it's been very lonely out there.*

Fears for the future

Around a quarter of responders (25%) specifically raised their fears about the future. Most were unsure whether they would survive – especially with the continued uncertainty around the course of the pandemic – and would perhaps need further assistance to make it through the next year or so.

Support has helped - furlough/grants

21% of respondents, while acknowledging that they were still in a precarious position, were grateful for the financial support provided by both national and local government through loans, grants and the furlough scheme. The majority believed that they would have been unable to make it this far without this assistance.

Government regulations

Participants were also eager to raise the issue of ongoing public safety regulations. Many argued that their businesses could not survive long-term with these remaining in place – especially those in the events and hospitality industries – and, therefore, it was vitally important that additional assistance was provided to ensure the continued viability of this sector.

Help from district council appreciated

Interlinked to the national and local government financial support received, another common theme was appreciation for the work specifically undertaken by the councils to support local businesses during the pandemic.

- *“The Vale team were really lovely and supportive during lockdown. This is hugely appreciated. It's very easy to feel like you are lost in the machine but having a real team of human beings to talk to was invaluable when too often you end up feeling like you are spending your day talking to chat bots or filling in forms and sending them off into the void.”*
- *“Your ongoing support has been greatly appreciated.”*
- *“The support you've given us has made a huge difference to our business and taken a lot of pressure away.”*
- *“You are doing a great job supporting local businesses.”*

HOW WE HAVE USED THE RESULTS OF THE ENGAGEMENT

We'd like to thank everyone who took the time to respond to this survey. From a total of 207 responses, we learned that broadly, businesses are weathering the storm, but if current economic conditions do not improve, then over half of respondents do not expect their business to survive beyond 18 months.

Key findings from the survey help to highlight the varied impact of the pandemic on the area's business community and ultimately show that businesses will continue to need dedicated support in the months ahead.

The survey also informed us that 49% of responding businesses were unaware of any of the support services currently provided by the South and Vale Business Support Team (SVBS). This demonstrates that there is further work to be done in building engagement with the local business community, so that more businesses are aware of and able to access relevant resources. The survey reinforces that now, more than ever, communication with the area's business community is vital.

We are pleased that 47% of participants believe that being a part of a focus group or a similar initiative would be useful for their business. Additionally, over half of all respondents (53%) were interested in having a one to one discussion with the SVBS team. In both cases, businesses provided us with their contact details, allowing us to reach out and further understand the challenges they face. One to one discussions and Focus Groups will help the SVBS team to build ongoing engagement across key sectors and ensure that future support is relevant and impactful.

Findings from the consultation will be used to guide future business support initiatives delivered by the councils. We will also share resulting data with our neighbouring District Councils, the Oxfordshire Local Enterprise Partnership (OxLEP) and UK Government departments so that it may help to inform wider regional and national economic recovery plans.

This report and the appendices will be published on the [South and Vale Business Support website](#) and promoted via SVBS's existing e-newsletter and social media channels.

FURTHER INFORMATION

For information about the engagement or the results presented in this report, please contact:

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To enquire about the councils' support for businesses, please contact:

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South and Vale Business Support
South Oxfordshire and Vale of White Horse District Councils
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APPENDICES

The appendices to the Business Recovery Survey – Autumn 2020 engagement report are available in a separate document. The appendices documents can be found on the South and Vale Business Support [website](#) alongside this engagement report.

APPENDIX A – BACKGROUND TO THE ENGAGEMENT

APPENDIX B – ENGAGEMENT METHODOLOGY

APPENDIX C – ENGAGEMENT COMMUNICATION

APPENDIX D – SURVEY

APPENDIX E – QUANTITATIVE DATA

APPENDIX F – FULL LIST OF COMMENTS RECEIVED