Marlborough and the Parishes Neighbourhood Plan: Business survey 2017

A report to the Neighbourhood Plan Committee on the needs of existing and potential businesses.

April 2017

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1. Executive summary

There were 167 responses to the business survey; 156 from existing businesses and 11 from people expecting to start a new enterprise in Marlborough. Based on those responses, the key findings are these:

Existing businesses

- The majority of businesses in the area (52%) have been established for more than ten years but 9% having been established within the previous two years suggests a good rate of business creation.

- A very wide range of sectors was represented in the survey responses, headed by consultancy, retail and ecommerce and health and wellbeing.

- Around 40% of these enterprises are home based and amongst the remainder it was twice as likely that property would be rented than owned.

- Three out of four businesses had either no employees (22%) or fewer than five (55%). In total, these existing businesses employed around 800 people.

- By far the most important reason for locating their business in Marlborough or the Parishes was that it was also where they lived. This gave some the added advantage of being able to work from home if that was what they wanted or needed to do. An additional 14% had started their business because they had identified a market opportunity.

- Within the next five years, 15% of existing businesses expect to need new premises and a further 22% think this is possible. The majority will look for these premises within the Marlborough area.

- It is those in rented property who are most likely to be definitely seeking a move. In addition, a small number of those who currently work from home will or may need to move into premises in the same time frame.

- The most likely requirement is for small premises; half the sample will require less than 50 sq m. Interest was expressed in serviced office premises by 13% of existing businesses.

New business creation

- Amongst the 11 potential new businesses the most frequently mentioned sector was that of health and wellbeing (3) and there were also two manufacturers in the food and drink sector. Overall there seem a good variety of new business ideas to contribute to the local economy.

- The main reasons for starting their business in Marlborough were linked to their residence here combined, as for existing businesses, with the convenience and desirability of working from home. But five were also confident that they identified good market opportunities, including the three in health and wellbeing which suggest it is a buoyant sector at the moment.

- Most would be small enterprises with no or very few employees but the manufacturers expected to employ three – five or ten – twenty people.

- Five of these new enterprises would be looking for premises, mostly to rent but with one considering purchase. The remainder would work from home. The two manufacturers would both need up to 1,000 sq m and one new business involved in outdoor pursuits would be looking for 'at least an acre of land'.

- Only one would be interested in serviced office space and two potentially in start up units.

- Six were optimistic about starting their new business within the next year.

- In terms of location, it was not appropriate for any of these businesses to be in the town centre and the majority preferred the edge of town.

Future demand for premises

- Taking into account demand from both existing and new businesses, over the next five years there are likely to be 37 enterprises looking for premises in Marlborough and the Parishes. As the survey covered a sample of local business rather than all, this should be viewed as a minimum figure.

- Much of the requirement is for small spaces (more than 50% of those who know the size they will want) but larger premises will be needed too.

- There is also a good level of interest (21 people) in serviced office premises or small start up units. Much of this interest comes from people within the 37 who need small spaces but there are others currently working from home who may be tempted by the availability of serviced or start up facilities.

Factors helping or inhibiting business success

- Top of the list of factors thought likely to help businesses to succeed were better/faster broadband and greater availability of parking for both customers and staff. These were followed by a desire for better traffic and transport management and lower congestion, making it easier for everyone to move around the area and reasonable rent and rates levels.

- There was also a lower level of comment about promotion and advertising of the area and maintaining the appeal and vibrancy of the High Street with the 'right' retail offering and facilities.

- Factors likely to inhibit growth and success were largely the converse of those above with parking the main concern. Respondents also mentioned the importance of access to suitable staff for their business and 10% noted general financial concerns.

- More than one in five thought that tourism was a significant factor in the success of their business.

Additional conclusions

- Overall, the business climate seems healthy and broadly based; Health and wellbeing seems a buoyant and growing sector, even if populated largely by very small enterprises.

- The evidence from this survey is that many enterprises are small in size and whilst there is growth and development, the extent of job creation is likely to be limited.

- There is clearly a demand for small premises, including serviced offices and start up units, which the Council should take into account in forward planning. There is also a significant 'work from home' community who will continue to feature in local business.

2 Introduction

Marlborough Neighbourhood Plan Committee is currently preparing a Local Plan for Marlborough and the three surrounding Parishes of Mildenhall, Savernake and Preshute. One element of this will be to develop a strategy for supporting businesses in the town. A second aspect is a survey of households to identify and quantify housing need for the next few years. The MNPC therefore commissioned Cobweb Consulting to conduct a survey on their behalf which was designed to obtain evidence from both businesses and residential households.

The method chosen was a postal survey, conducted in two ways. A short business questionnaire was included with a longer questionnaire sent out to every household to cover the housing issues. The objective of this was to allow us to reach any ‘hidden’ businesses such as those without premises and also anyone proposing to start or relocate a business in Marlborough. The questionnaire distributed to households included questions on employment type and location to support the information obtained from the business community itself. Web versions of both questionnaires were also made available and publicised on the Town Council and Neighbourhood Plan websites. The questionnaires were distributed in January 2017 and response was closed mid February. In addition to this, the Town Council distributed the same questionnaire to a list of existing local businesses and received responses up until the end of February.

Good response rates were achieved and the final sample was 167. Amongst the replies there were 156 from existing businesses, 8 from potential new businesses and 3 who were both running an existing business and proposing a new one.

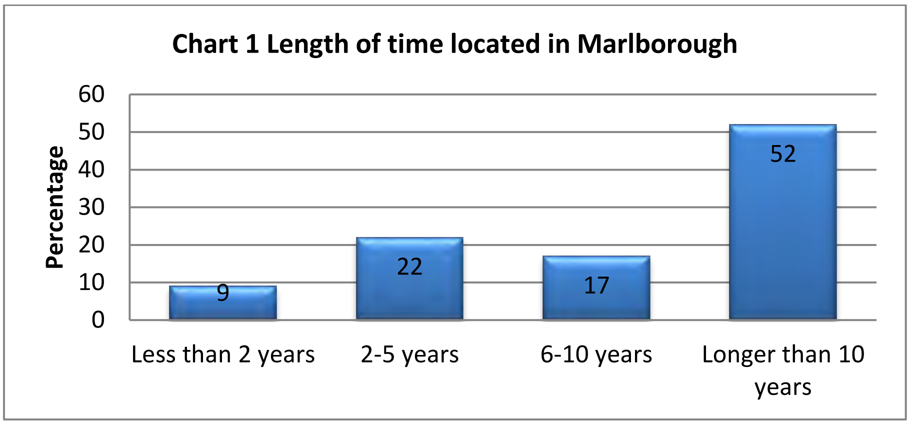
This report presents the findings from the business survey; the analysis of housing need is the subject of a separate document. The business sample obtained was not intended to be statistically representative of the business community as a whole and should be regarded as a ‘snapshot’ of the situation at the time. We have not therefore weighted the sample in any way or grossed up the figures obtained.

Danny Friedman and Ros Grimes
April 2017

3 Detailed findings

3.1 Existing businesses

The majority of the existing businesses responding were well established in the area; 69% having been in Marlborough or the Parishes for more than five years, including more than half of the total who had been established for at least ten years.



Base: all existing businesses (159)

However there is a rate of new business creation, evidenced by the 9% established for less than two years.

The nature of these businesses varied considerably from retailers and farmers to manufacturers, accountants, holiday lets, dentists, dog groomers and thatchers. The sectors in which they work are summarised in this table.

Table 1 Nature of business	
	%
Consultancy	14
Health and wellbeing	12
Retail and ecommerce	12
Professional (finance, legal etc)	10
Property maintenance/construction/decoration	10
Holiday let/tourism	5
Creative	5
Manufacturing	5
Pub/coffee shop/hospitality	4
Farming	3
IT/software/electronics	3
Taxi/transport	3
Education/training	3
Hairdressing/beauty	1
Other services	9
Other	4

Base: all respondents (159)

Consultancy was most frequently mentioned overall and included: building, education, management, interior design and wine. The 'Health and Wellbeing' sector seems very active and includes therapists, counsellors and healers as well as dentists and GPs. Overall, there seems a very wide range of occupations and services offered.

The number of employees was also recorded and varied from none to more than seventy but the great majority of businesses were small, with fewer than five employees.

Table 2 Number of employees in existing businesses		
	%	Total number
None	22	0
One to five	55	174
Six to ten	9	100
Eleven to twenty four	9	199
Twenty five to fifty	4	196
More than fifty	1	143
		812

Base: all respondents providing information on employees (141)

Those with no employees were 31 in total and were varied in nature. More than half the businesses had fewer than five employees and only two employed more than 50 people. The last column in Table 2 shows the total number of employees represented within each size of business, with a final total of just over 800.

Some 40% of these businesses are operated by people working from home which may partly explain the preponderance of consultancy and other businesses which do not need premises or where the supplier will visit the customer (such as tree surgeons). Amongst the remainder it is twice as likely that premises will be rented than owned. NB a few people gave more than one answer to this question eg they work from home but do also rent premises. Referring back to the number of employees, it was found that businesses with none are more likely to be home based; 58% of this group work from home compared with the 40% overall.

Table 3 Nature of premises	
	%
Own premises	20
Rent premises	46
Work from home	40

Base: all respondents (159)

Cross tabulation shows that newer businesses are a little more likely to be home based, 40% have been in business for up to five years, compared with 23 % or 26% of those who own or rent premises. But there are also some well established home based businesses, 45% having been operating for at least ten years.

Respondents were asked to express in their own words why they originally chose to locate their business in Marlborough or the Parishes. Most important by far was that it was where they had chosen to live; Table 4 records that 42% gave this response. A further 9% quoted 'family reasons' or moving to the area with a partner which extends the same line of thought.

Table 4 Reasons for locating existing business in Marlborough

	%
Because it is where I live/already lived here	42
Able/wanted to work from home	14
Market opportunity/good customer base	14
Like the town/good place to live	8
Convenience/family reasons	6
Historic reason/been here a long time	5
Availability of suitable premises	4
Opportunity to acquire/bought existing business	3
Moved here with partner	3
Other reasons	14

Base: all respondents (145)

Another 14% mention wanting to work from home and a similar number thought they had identified a good market opportunity in the area. A few had bought existing businesses or had a long established business. The 'other reasons' included: the availability of good schools locally, reasonable rent and rates and a favourable retail environment with other independent shops.

To assist the Neighbourhood Plan Committee with forward planning, respondents were asked if a move of premises was likely for them within the next five years. More than one in three thought this was at least a possibility with 15% being certain.

Table 5 Whether new premises likely in next 5 years	
	%
Yes	15
Perhaps	22
No	63

Base: all respondents (159)

There is not a great deal of variation in relation to the length of time the business has been established, as the next table shows.

Table 6 Likelihood of moving by years located in Bradford				
	Less than 2 years	2 – 5 years	6 – 10 years	More than 10 years
	%	%	%	%
Yes	20	18	22	10
Perhaps	47	64	70	63
No	33	18	7	27

Base: all respondents (158)

The longest established businesses are least likely to be considering a move, only 10% compared with around 20% of all others which is perhaps understandable. The youngest businesses are probably most cautious overall but in all groups there seems a willingness to look ahead and at least consider a move.

We can also consider likelihood of moving in relation to the nature of current premises

Table 7 Likelihood of moving by nature of current premises

	Own premises	Rent premises	Work from home
	%	%	%
Yes	10	24	6
Perhaps	77	46	76
No	13	30	18

Base: all respondents (158)

Those who rent premises are noticeably more likely to be firmly considering a move. This may be for a number of reasons:

- It may be that they have more flexibility than others
- Perhaps renting has been a deliberate strategy while their business develops and there has always been a possibility of moving
- Or they may previously have been unable to find what they would regard as more permanent premises

If this is presented as numbers of businesses then it is found that twenty of those who already own or rent premises are certain of needing new premises in the next five years and a further twenty five may do so. As already noted, grossing up these figures to the whole business community is difficult as we are uncertain how representative our sample is of the total so these are perhaps best regarded as minimum numbers.

In addition, there are some people who currently work from home who may also be looking for premises and they are effectively ‘new to the market’. They are a smaller percentage but may represent people who have started businesses from home and are now looking to grow and expand. Within this sample there are four people who currently work from home who will need new premises and a further eleven who may do so.

Those looking for premises were asked approximately what size they would need. Quite a high proportion (45%) were unable to answer but amongst the others the general impression is of fairly small spaces being required – half of them (28% of the total) would need less than 50 square metres.

Table 8 Likely size of new premises in square metres		
	%	Number of businesses
Small/ less 25 sq. m	25	8
25 – 50 sq. m	25	8
100 – 150 sq. m	28	9
Between 150 and 200 sq. m	9	3
300 sq. m	3	1
400 sq. m	3	1
750 sq. m	3	1
1500 sq. m	3	1

Base: all looking for new premises in next five years and providing size (32)

The majority (71%) of the people looking for premises would want them to be in Marlborough but 17% would be looking outside the area (the remaining 12% did not answer). Asked why they would not consider Marlborough three (of ten) said they thought premises would be too expensive, three were moving out of the area or retiring from business and two thought there would be no suitable space available. Other comments were each made once only and included: insufficient footfall, poor parking, poor road and rail communications and having a main office out of the area.

The ten who may move away from the area include one who owns their current property, six who rent and three who work from home. The nature of the businesses likely to be lost varied widely from professional services such as finance and consultancy to electronics, construction, photography and window cleaning.

One final question for existing businesses was to ask if they would have any interest in serviced office premises. Overall, 13% indicated an interest, twenty businesses. This includes seven of those definitely looking for new premises and one of those who may do so – a total of eight. The remaining twelve were people who had not expected to move so perhaps they would be swayed if a suitable facility was available.

3.2 New businesses

The eleven people with new business ideas were asked what would be the nature of the proposed business and there was a good variety of answers. NB as the numbers are small, the tables in this section show absolute numbers rather than percentages as these could be misleading.

Table 9 Nature of proposed new business	
Health and wellbeing	3
Manufacturing	2
Creative	1
Consultancy	1
Training and education	1
Property maintenance/construction/decoration	1
Other services (garden design)	1

Absolute numbers

Three of the proposed new businesses would be within the health and wellbeing sector. There were a good number of such businesses amongst existing ones too, which suggests a strong and growing part of the market, even if likely to be smaller concerns for the most part. Both of the 'new' manufacturers are within the food and drink sector. The list overall shows a wide and varied contribution to the local economy.

The main reasons given for locating the potential new business in Marlborough were that a market opportunity has been identified and/or that they are already resident in the area.

Table 10 Reasons for locating new business in Marlborough	
Market opportunity/customer base here	5
Family reasons/convenience	5
Already live in the area	3
Able to or wanted to work from home	2
Like the town/good place to live	1

Absolute numbers

Whether it is simply that they are already resident in the area or that working from home gives additional advantages (being near children in school, being able to walk or cycle to work), living locally is a strong reason for the location of the new business. Those who mention market potential include all three of the new health and wellbeing businesses which further underlines that it is a buoyant sector locally. The general impression is that people seem to have what they need here from both a business and a personal point of view.

The number of employees likely to be needed are as follows:

Table 11 Number of employees for new business	
None	3
One	2
Two	1
Three	1
Three - five	1
Ten - twenty	1
Unable to say	2

Absolute numbers

Clearly most will be small enterprises initially but some will have potential for growth; one respondent at least mentions ‘working from home and building the business’. It is the food and drink manufacturers who have the immediate need for more staff, which is understandable.

Some of the new businesses would be looking for premises but the majority expect to work from home. This is to be expected given that some will need no or very few employees and in the light of the reasons given for locating in Marlborough.

Table 12 Type of premises for new business	
Premises to buy	1
Premises to rent	5
Will work from home	7

Absolute numbers

A couple of people would be looking to both rent and work from home. The food manufacturer who would be the largest employer would be looking for premises to rent or buy.

Amongst those looking to rent or buy the size requirements would be as follows:

- 10 – 20 sq. m. Two people
- 500 – 1,000 sq. m. One person
- 1,000 sq. m. One person
- At least an acre (outdoor pursuits) One person

It seems that most people are optimistic about getting their new enterprise under way soon as, when asked when the premises would be needed, six of the eleven said ‘within the next year’. Two others were more cautious and the others unsure.

Table 13 When premises needed	
Within next year	6

One to two years	1
Two to five years	1
Unsure	3

Absolute numbers

The larger food manufacturer is the one working on the two to five year time scale which is perhaps understandable as he will no doubt have a longer 'lead time' to get established than, say, a therapist or consultant working from home.

There was not a great deal of interest in serviced offices (one person) or small start up units (two people); most felt they would need neither of these. However, one of those who had previously said they would work from home was tempted by the latter so there may be a market if the units were well planned and advertised.

As a final question, respondents were asked what would be their preference for location of their new business, with the options of the town centre, the edge of town or a rural location. No-one opted for the town centre which is easy to understand given the nature of these businesses, there were no retailers or catering establishments for example. Most (six) preferred the edge of town, two rural and one would have been happy with either of these. Two did not respond.

3.3 Overview of future demand.

Taking together the expressed needs of both existing businesses and potential new ones, this table shows future requirements. It excludes those who will be looking outside Marlborough or the Parishes for premises.

Table 14 Future demand for premises from new and existing businesses

	Number of businesses
Small/ less 25 sq. m	10
25 – 50 sq. m	8
100 – 150 sq. m	9
Between 150 and 200 sq. m	3
300 sq. m	1
400 sq. m	1
750 sq. m	1
500 – 1,000 sq. m	1
1,000 sq. m	1
1500 sq. m	1
At least an acre (outdoor space)	1

Base: all new and existing businesses likely to look for premises (37)

As already noted elsewhere, much of the requirement is for small spaces although some businesses will need a larger premise. And one will be looking for a large outdoor space too.

Also, there are a total of 21 people who may be interested in serviced offices and two in start up units. There is some overlap between this group and those looking for small premises, but as some of those who had initially expected to work from home seem to show an interest in serviced offices or small units, there is perhaps some 'hidden demand' which might be unlocked by availability and advertising.

3.4 Factors affecting business success.

The final part of the survey had three questions for all business respondents. They were asked first to give three factors that they felt were, or would be, helpful to the success of their business. A good variety of comments were given but there are some strong themes amongst responses. Table 15 summarises the most frequent answers. Note that some of those mentioned are factors which **do** operate eg they have good staff or they are in an area which has a good footfall and some are things they **would like** to have eg faster broadband. In a self completion questionnaire it is not always possible to interpret which of these is meant but we suspect that what the table shows is largely a 'wish list' and can be interpreted as setting out an ideal business environment.

Table 15 Factors helpful to business success

	%
Better/faster broadband	24
Better/more parking	21
Better transport/traffic management/less congestion	16
Reasonable/affordable/lower rents and rates	15
Good/better road and rail communications	11
Good footfall/client base	10
Promotion of the area as a tourist attraction	8
Free or cheaper parking	8
Local advertising	8
Good, stable economy	8
Reference government policy/taxation/grants	8
Better mobile signal/service	7
Access to/availability of staff	7
More independents/fewer charity shops	5
Good local suppliers/services/facilities (PO, banks, toilets)	5
Reference easier planning/access to land	5
Better Local Authority/Town Council services/waste/public realm	5
Availability of suitable premises	5
Having good staff	5
The nature of the area as older age/affluent	5
Other factors	39

Base: all respondents (132)

The one single factor mentioned more than others was the need for faster broadband, offered by one in four business owners. Another very important theme is the ease of travel around the area and access to their business – there was a lot of concern about congestion and transport issues and about parking. The availability of parking seems to be more important than the cost of it as the former was mentioned by 21% but cost by only 8%. A number of respondents are as concerned about parking for staff as well as customers. There was also a lower level of comment about promotion and advertising of the area and maintaining the appeal and vibrancy of the High Street with the 'right' retail offering and facilities. Some of the smaller points are interesting, such as those who welcome the demographic profile of the area as they have a business whose main target is older ladies.

Reference to the cost of premises in terms of rent and rates was made by 15% and there was a low level of comment about improving public services. The 'other factors' were each mentioned by 4% of respondents or fewer. They ranged from issues such as the health of the business owner to better signage in the town to the usefulness of business networks. References to affordable housing were made by 4% and could perhaps be linked to the 7% who mention access to suitable staff.

Respondents were also asked what factors would inhibit the success of their business. Many simply came up with the converse of the factors they had suggested would be helpful, with just slightly different emphases.

Table 16 Factors likely to inhibit business success	
	%
Lack of parking	25
High rents and rates	21
Poor broadband	21
Traffic congestion/road works	17
Poor communications/transport links	11
Availability of suitable/trained staff	11
Financial concerns	10
Lack of availability of suitable/affordable premises	7
Economic uncertainty	7
(Too much) competition	7
Poor footfall/demand/market trends	6
Factor specific to their business (demand/location)	6
Poor mobile service	5
Lack of promotion/publicity/support for tourism	5
Government policy/red tape	5
Planning difficulties	5
Cost of parking	4
Too many retirement developments/other over development	4
Underinvestment in High Street	4
Negative reference Council/lack of support for business	4
Poor signage	4
Other factors	17

Base: all respondents (115)

Parking becomes the most likely factor to hold back success but it is very closely followed by high premises costs and poor broadband. Again, the availability or parking is much more important than the cost. Concern over traffic management and transport links continues and being able to access suitable staff was also acknowledged as a potential problem.

The financial concerns which trouble 10% of these respondents include insurance, advertising, interest rates and staff development as well as higher costs generally for services and maintenance. The smaller comments in Table 16 largely mirror those at a similar level in the previous table. 'Other factors' include: funding issues, the closure of the High Street on certain days and the lack of 'ordinary'/affordable housing.

One final question asked whether respondents thought that tourism was a significant factor in the success of their business or not. Some 22% said that it was, with 64% thinking not and 14% declining to answer. Those thinking tourism had a positive influence included the obvious ones such as holiday accommodation, taxis, coffee and tea shops and retail outlets. But it extended more widely into property and maintenance services, creative occupations and some of the health and wellbeing businesses also.

4. Conclusions

An overall conclusion on business in Marlborough and the Parishes is that there is a healthy climate overall. Many local businesses are long established but there are clearly recently established ones and potential new businesses to be created also. There is a very wide range of types of business and a noticeably buoyant 'health and wellbeing' sector at present. There is a proliferation of small businesses with, on the evidence of this survey at least, around 40% run by people working from home. The reasons for this are a mixture of size, convenience and opportunity, combined with the attraction of living and working in a pleasant environment. There is some evidence that such very small businesses do grow and expand but the majority will probably stay very small, if not sole traders. There are limited opportunities therefore for these businesses to create significant employment.

Businesses do express concerns about traffic management and congestion issues and about the availability of parking for customers, visitors to the town and employees. Better/faster broadband is high on the 'wish list' of factors to aid the success of local business, as is the need to keep rents and rates at a reasonable level. A significant number feel that tourism is important for them and there is a wish for support for tourism and careful guardianship of the High Street to preserve both functionality and the charm and attractiveness of Marlborough. These are factors for both the Town Council and the Neighbourhood Plan Committee to be aware of in forward planning. Support is required for both established businesses and those starting up.

On the evidence of this research, the minimum demand for premises over the next five years is likely to be from 37 businesses. This includes 32 existing businesses (of which 23 are reasonably certain of moving) and five new enterprises. Much of this future demand will be for small units (less than 50 sq m), although some larger premises will need to be available. There are also 23 people who may be interested in serviced office premises or small 'start up' units. There is some overlap with the previous group of 37 but also likely to be some hidden demand for serviced accommodation amongst people who do not currently see themselves as in the market for premises.

Appendix Business questionnaire

MARLBOROUGH AREA BUSINESS SURVEY

This questionnaire is being sent to every business in the Neighbourhood Plan area (Marlborough; Mildenhall; Preshute and Savernake) (NP Area). It aims to inform the Town Council of the needs of local business and to help shape their policies for the future. Please take a few minutes to complete and return the questionnaire in the FREEPOST envelope before the **closing date of Friday 17 February 2017**.

This questionnaire has also been included with a survey of households so if you should receive two please complete only one.

Q1 Do you ..?

Already own or run a business in NP Area	1	***Please complete sections B1 & B3***
Intend to start a new business in the NP Area or relocate an existing out of town business into the NP Area	2	***Please complete sections B2 & B3***

Section B1 Existing businesses – current and future needs

Q1a What is the nature of your business?	Q1b How many people do you employ?

Q2 How long has your business been located in the NP Area?

Less than 2 years	1	6 – 10 years	3
2 – 5 years	2	Longer than 10 years	4

Q3 Why did you originally choose to locate your business here?

Q4 Do you..?

Own premises	1	Rent premises	2	Work from home	3

Q5 Are you likely to want or need to move to new premises within the next five years?

Yes	1	No	3
Perhaps	2		

Q6a *If Yes or perhaps* What size premises would you need approximately? .... m²

Q6b *If Yes or perhaps* Would you look for these premises within the NP Area or not?

Yes	1	**If not, please explain the reasons**
No	2	

Q7 Would you have any interest in serviced office premises?

Yes	1	No	2

Section B2 New or inward locating businesses

Q8a What is/would be the nature of your business?	Q8b How many people might you employ?

Q9 Why do you want to locate the business in the NP Area? What do you see as the advantages?

Q10 What type of premises will you need?

Premises to buy	1	Premises to rent	2	Will work from home	3

Q11 And when do you expect to need them?

Within the next year	1	In one to two years	2	In two to five years	3

Q12 Approximately what size of premises would you need? ……………….. m^2

Q13 Would you have any interest in ..?

Serviced offices	1	Neither of these	3
Small start up units	2		

Q14 Bearing in mind any need you would have for customer parking and/or to receive deliveries, would your preferred office location be ….

Town centre	1	Edge of town	2	Rural location	3

Section B3 Factors affecting your Business

Q15 What are the 3 main factors that are (or would be) helpful to your business success?

Q16 What are the 3 main factors that do (or would) inhibit your business success?

Q17 Do you think that tourism is a significant factor in your business success or not?

Yes	1	No	2

Please provide contact details if you would be interested in helping to shape local business policies.

Name	
E-mail	
Phone	

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