Business Survey 2023

Final Report

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Stratford-on-Avon District Council
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1.0 Introduction

Stratford-on-Avon District Council is committed to working with businesses through its Community Engagement Strategy. One of the priorities in the Strategy is to engage with businesses, so that we can better understand the state of business in the district and the needs of the business community.

A business survey was designed for the sector to help to influence and inform the development and delivery of emerging strategies, including a new Council Plan, the South Warwickshire Local Plan, and the actions for the Economic Development Strategy.

The survey also looks at how we administer the business rates system and includes some questions for the Coventry and Warwickshire Growth Hub.

The Business Survey has been a constant since 2002 and in this case the report covers comparisons going back ten years to 2013.

2.0 Methodology

A mailing of questionnaires went out to 3,556 businesses on the Business Rates address database towards the end of October 2023, with a reminder sent at the end of November 2023 to those who had not responded.

The survey was also promoted, via various channels, to obtain feedback from those businesses not on the Business Rates register.

722 were completed, including 110 who took up the opportunity to complete the questionnaire online. 210 questionnaires were returned to SDC by the Royal Mail not delivered, i.e., not known at this address, gone away, no longer a business, not accessible etc. A true response rate is not possible, as the survey was made available to all and not just those on the business rates register sample.

The report follows the order of the questionnaire. Charts and tables are used throughout the report to assist the interpretation of the results. In some cases, anomalies appear due to "rounding".

The comparison results by company location, status of company and number of full-time employees are only included if they are statistically significant. If a comment on a particular result has not been made, it can be assumed that there is no strong relationship between the two questions, i.e., rating of Stratford District as a place to do business by status of company. The significance is calculated by comparing the mean of a category with the overall mean using a "z-test". This establishes the level of significance between the two results. For this report, only results showing a significant relationship between the two have been included *(there is evidence of a relationship, significant at the 5% level or lower).*

Where relevant, comparisons with similar questions in the 2013, 2016 and 2018 Business Surveys have been included to find trends. The term "base" in the tables and charts refer to the number of responses to a particular question.

3.0 Summary of Results

3.1 Profile of Business

- Exactly a third of responses came from businesses based in Stratford-upon-Avon, which was 2 points less than 2018.

- Just under two-thirds of those surveyed were independent with no other branches (63%), with a further 10% a branch or subsidiary of a larger group.

- 14% of those surveyed said their main business activity was retail, 12% indicated manufacturing and engineering and 8% stated tourism, leisure, and hospitality.

- Almost half of those surveyed (47%) have been trading for more than 20 years. One in ten have been trading for up to three years.

- Exactly two-thirds of businesses employed between one and five full-time employees, the same as the previous survey, and just over three-quarters (78%) had between one and five part-time employees. 24% had 6 to 20 full-time employees on their books, up 1 percentage point from 2018.

- 37% of staff lives in the same town or village as the company, with a further 29% living elsewhere in the district and a third outside Stratford District (32%).

- Businesses were asked on average how many days a week did they and their employees work from home. 63% of staff never did, 15% did so one day a week and 10% two days a week. 7% of the sample worked five days a week at home.

4.2 Location of Business

- 37% responded that the nature of the site/premises was the main reason why their company was located where it was, down 2 points on 2018, with 36% saying they live locally/owners' hometown (up 5 points), and it was historic, been there for years at 33% (down 3 points). Exactly a quarter stated it was the proximity of their customer base.

- In floor space terms on the site, 45% had less than 250 square metres, 1 percentage point down from the 46% in 2018. 7% of those surveyed had a very large total floor space in excess of 5,000 square metres.

- Almost nine out of ten businesses (87%) felt their premises were suitable for their current or future likely needs. This represented a decrease of 2 percentage points on the 2018 figure.

- 72% of those surveyed felt their floor space may see no significant change in the next 10 years: 3 percentage points down on the previous survey. 13% thought it would increase by 10% to 15%, slightly higher than earlier surveys. 5% felt there may be an increase of more than 100%, which was one point less than in 2018. 6% of businesses felt the floor space would need to be reduced.

- Businesses were asked for their intentions about their current location. Just under three quarters (72%) felt they were likely to stay at the current location, which was lower than in the previous three surveys, 17% were thinking of expansion, 2 points higher than in 2018, 8% were interested in relocation and 3% said their intention was to contract.

- Respondents were asked to indicate up to three main problems faced by their company at their location from a given list of problems.

- More than half of businesses (54%) stated that the main problem that affects the operation of their business was rising costs), up 11 percentage points from the previous survey in 2018. 29% stated business rates, down two points on 2018.

- Staffing problems are more prominent in 2023. The problem of staff recruitment and retention has risen from 7% in 2013 to 24% ten years later. Similarly, the shortage of skilled staff has risen from 10% in 2013 to 23% in 2023.

- 23% mentioned the availability of parking for staff/visitors and 18% the broadband/mobile phone coverage, that was a lessening problem, down 7 points on 2018. 18% of businesses stated road /traffic congestion, which is 5 points less than 2018.

- Businesses were asked what they felt was the biggest impediment to the growth of their businesses out of all the problems which they faced now. The biggest impediments to growth were costs and staff recruitment.

- Businesses were asked, if the company intends to relocate, where they wish to move to. Excluding those who do not know or were not sure, 53% wished to move within the same town or village; 18% said elsewhere in the district and 29% outside the district. There has been a general trend over the last ten years away from relocating within the same town or village and towards relocating outside the district.

- Asked if their company wished to relocate in Stratford District, 33% thought there were suitable sites or premises available, down by 4 percentage points from the 37% recorded in 2018 and 13 points lower than 2013.

- If businesses felt there were no suitable sites or premises available, 48% would look at the edge of or inside of Stratford-upon-Avon, 19% in or on edge of a large rural town or village, 21% would look at a rural location and just over a quarter (27%) a business park of large employment site.

- Those looking to relocate were asked about the size of premises they would look to relocate to. 44% of businesses would look at something less than 250 square metres. 21% would look at 250 to 500 square metres and 11% 500 to 1,000 square metres. 8% would look at more than 5,000 square metres.

4.3 Stratford as an Area for Business

- Respondents were asked how the area can be improved to assist businesses and the economy from a list provided.

- Reduce business rates and other charges remained the most popular option to assist businesses and the economy in the area, with the percentage opting for it increasing by 5 percentage points from 49% in 2018 to 54% now. Improving the road network fell by 3 points at 39% and 35% wished for improved public transport, 6 points higher than 2018. Improvements to broadband connections fell sharply from 41% in 2018 to 28% in 2023.

- Businesses wanting more parking spaces fell from 37% in 2018 to 28% in 2023. The same percentage wanted the provision of more affordable business units.

- Respondents were asked to comment on the one piece of infrastructure they would wish to see improved in the district and why. By far the most common response was that roads and the road system in the District should be improved.

- Businesses were asked to rate the District as a place to do business. 57% rated the area as very good or good, which was 6 percentage points down on the last two surveys. 37% said it was average, an increase of 5 points. 5% answered poor or very poor, consistent with previous years.

- Businesses were asked what the most important form of support was they would welcome from Stratford-on-Avon District Council and business support organisations - the most support required from SDC is rates relief help in terms of making them affordable.

- 21% of business were aware of existing enterprise centres located in Stratford district. Those in Stratford town were more aware (28%).

4.4 Coventry and Warwickshire Growth Hub

- 176 businesses said they were currently looking for free support to overcome any challenges/barriers to growth.

- 58% requiring support wanted it on access to finance, 36% on growth plans and 34% on skills and training.

4.5 Business Rates

- Businesses were asked if they pay business rates (NNDR). Exactly 60% answered they did. Exactly a quarter had contacted the Council in the last 12 months about business rates.

- Respondents who had contacted the Council about business rates in the last 12 months were asked if they did so by telephone, to which 64% had done so. This is six points lower than the 2018 figure. Smaller businesses more likely to make contact.

- 41% of those surveyed agreed with the above statement, "the telephone call I made to the Council was answered quickly", as opposed to 41% who disagreed. This was the lowest level of agreement throughout the periods studied. It was a 25-point drop on 2018. Disagreement rose from 15% to 41%.

- 46% of businesses agreed or strongly agreed with the statement, "once the call to the Council had been answered, my query was dealt with swiftly", compared to 37% who disagreed. The agreement level was 16 points lower than that recorded in 2018 and 26 points less than 2016. Disagreement rose from 24% to 37%.

- 40% were satisfied with the telephone service provided by the Council, a drop of 23 points on 2016. Disagreement rose from 20% in 2018 to 35% in 2023.

- 93% of those surveyed were aware of the Small Business Rate Relief compared to small percentages of businesses knowing about some of the other rate reliefs currently available to them, for instance, 10% of Discretionary Rate Relief. Since the last survey the retail, tourism, hospitality, and leisure rate relief were brought in, of which 19% were aware of this specific relief.

- 86% of businesses confirmed they had applied for the Small Business Rate Relief, although few had applied for other rate reliefs such as Discretionary Rate Relief (4%) and Mandatory Rate Relief (2%). This is consistent with other years. For the new retail, tourism, hospitality, and leisure rate relief, 19% had applied for it.

- Comments on the NNDR system highlighted a general lack of awareness and confusion over the different reliefs which were available and could be applicable to their businesses. Several respondents thought that they were receiving reliefs automatically; a number were not and stated that they felt the process *should be* automatic. When businesses did apply for reliefs or reductions, they faced difficulties such as with the Valuation Office taking a very long time to respond, SDC also being slow on occasion, issues with errors in bills needing correction, and communication generally being poor.

4.0 Results in Detail

4.1 Profile of Business

4.1.1 Location

Exactly a third of responses came from businesses based in Stratford-upon-Avon, which was 2 points less than 2018.

Table 1: Location of Business

TOWN/ VILLAGE	NUMBER OF RESPONSES 2016	% OF TOTAL 2016	NUMBER OF RESPONSES 2018	% OF TOTAL 2018	NUMBER OF RESPONSES 2023	% OF TOTAL 2023
Stratford-upon-Avon	320	**33%**	302	**35%**	234	**33%**
Alcester	101	**11%**	97	**11%**	68	**10%**
Southam	76	**8%**	83	**10%**	72	**10%**
Henley-in-Arden	49	**5%**	51	**6%**	44	**6%**
Shipston-on-Stour	61	**6%**	62	**7%**	35	**5%**
Studley	56	**6%**	43	**5%**	38	**5%**
Bidford-on-Avon	57	**6%**	36	**4%**	30	**4%**
Wellesbourne	26	**3%**	17	**2%**	29	**4%**
Kineton	23	**2%**	15	**2%**	2	**<1%**
Elsewhere	190	**20%**	162	**19%**	159	**22%**

A full list is included in Appendices A and B covering the table below.

Table 2: "Settlement on edge of town or village or Rural location/Elsewhere in the District." mentions (3 or more responses where location indicated)

Location	Nos of Responses
Earlswood	8
Long Marston	3
Alderminster	5
Claverdon	6
Napton-on-the-Hill	4
Long Compton	4
Atherstone-on-Stour	3
Long Itchington	4
Welford-on-Avon	3
Alveston	3
Oxhill	3
Ufton	3
Salford Priors	4
Stockton	5
Tanworth-in-Arden	3
Tysoe	6
Wootton Wawen	5
Other	76
Base:	**(148)**

4.1.2 Status

Just under two-thirds of those surveyed were independent with no other branches (63%), with a further 10% a branch or subsidiary of a larger group. “Others” numbering 23 responses are included in Appendix C.

68% of independent businesses were based in Stratford Town against 61% based in the rest of the district. 14% of branch or subsidiary of a larger group were based in Stratford Town against 7% elsewhere. 20% of sole trader/partner/self-employed were based in the rest of the district. One in five (18%) employing 6 or more full timers were a Head Office.

Table 3: Status of Company

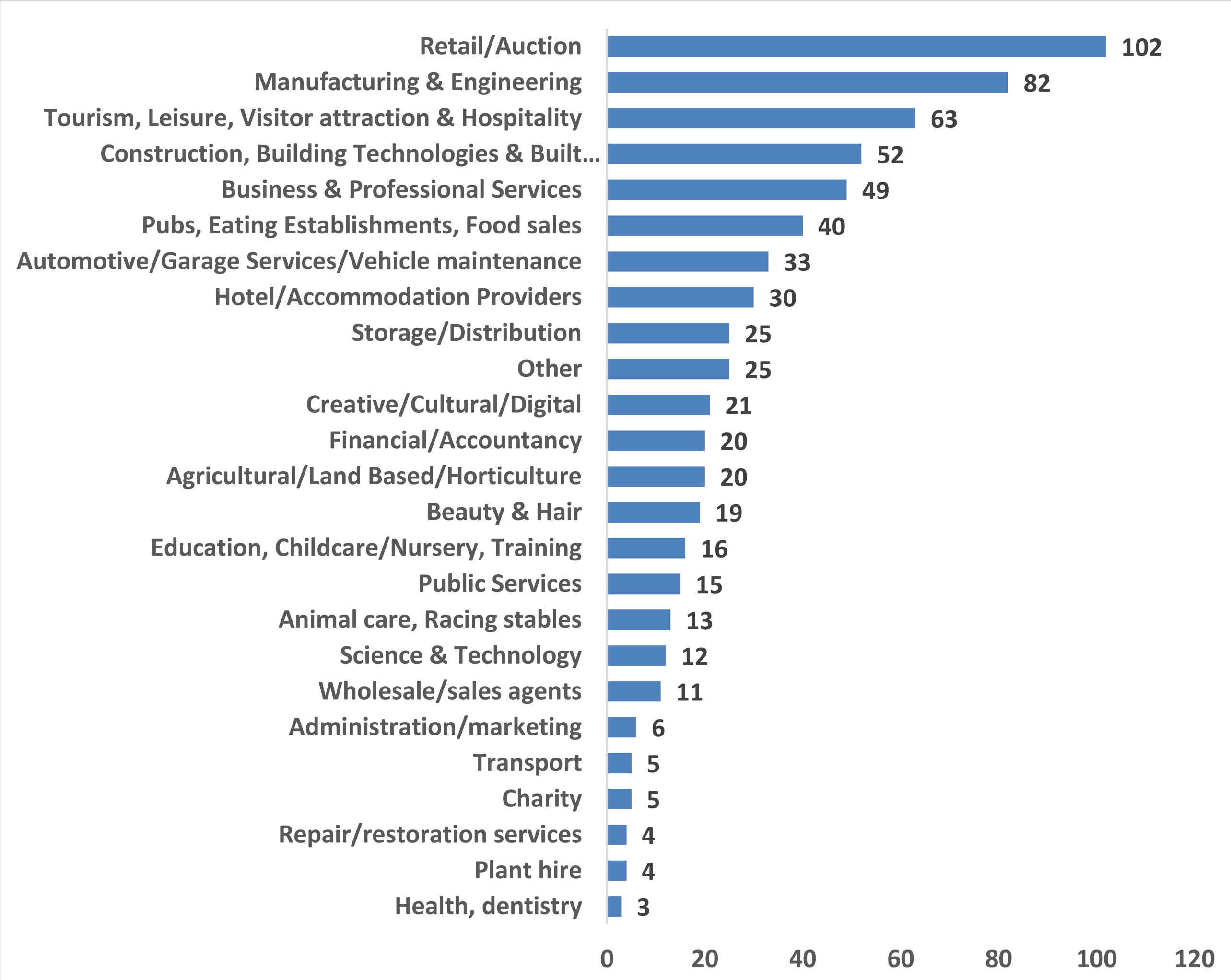
Status	**2013 %**	**2016 %**	**2018 %**	**2023 %**
Independent with no other branches	80	76	76	63
Sole trader/partner/self-employed	-	-	-	16
Branch or subsidiary of a larger group	10	11	12	10
Head Office	6	7	5	7
Public Sector organisation	1	1	2	1
Other	4	4	5	3
Base:	**(931)**	**(950)**	**(861)**	**(705)**

4.1.3 Main Business Activity

14% of those surveyed said their main business activity was retail, 12% indicated manufacturing and engineering and 8% stated tourism, leisure, and hospitality.

22% of retail businesses are based in Stratford town versus 11% in the rest of the district. 15% of manufacturing and engineering companies are based in the rest of the district against 5% in Stratford Town. 16% of retail businesses employed up to five full time staff, compared with 7% employing six or more. 19% of businesses with six or more full time staff were from the manufacturing and engineering sector. The 140 responses given to “other” are shown in Appendix D.

Figure 1: Main business activity at this location



4.1.4 Length of Trading

Almost half of those surveyed (47%) have been trading for more than 20 years. One in ten have been trading for up to three years.

61% of those employing six or more full-time staff had been trading for more than 20 years.

Table 4: Length of business trading

Length	2023 %
Up to 12 months	2
1 to 3 years	8
4 to 5 years	6
6 to 10 years	13
11 to 20 years	24
More than 20 years	47
Base:	**(711)**

4.1.5 Numbers Employed and Where They Live

Exactly two-thirds of businesses employed between one and five full-time employees, the same as the previous survey, and just over three-quarters (78%) had between one and five part-time employees. 24% had 6 to 20 full-time employees on their books, up 1 percentage point from 2018.

Table 5: Breakdown of full-time employees

Year	Base	1-5 employed	6-20 employed	21-50 employed	Over 50 employed
2013	(779)	73%	20%	5%	2%
2016	(804)	66%	26%	6%	3%
2018	(696)	67%	23%	7%	2%
2023	(618)	67%	24%	7%	3%

Table 6: Breakdown of part-time employees

Year	Base	1-5 employed	6-20 employed	21-50 employed	Over 50 employed
2013	(513)	82%	15%	2%	1%
2016	(520)	80%	15%	3%	2%
2018	(482)	76%	19%	3%	2%
2023	(379)	78%	16%	4%	1%

37% of staff lives in the same town or village as the company, with a further 29% living elsewhere in the district and a third outside Stratford District (32%).

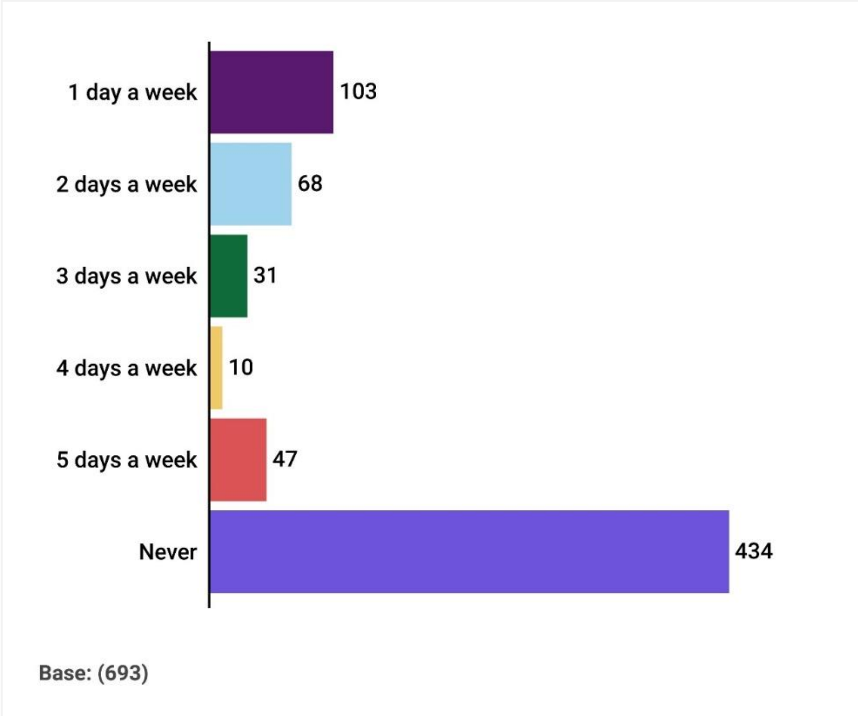
Table 7: Where staff live

Location	2013 %	2016 %	2018 %	2023 %
In same town/village as the company	45	41	41	37
Elsewhere in Stratford District	25	26	27	29
Outside Stratford District	29	33	32	32
Base:	**(848)**	**(840)**	**(564)**	**(616)**

A new question asked on average how many days a week did they and their employees work from home. 63% of staff never did, 15% did so one day a week and 10% two days a week. 7% of the sample worked five days a week at home.

The smaller the business the more likely staff worked from home five days a week.

Figure 2: How many days a week do you/your employees work from home?



4.2 Location of Business

4.2.1 Reasons for Location

Businesses were asked the main reasons why their company was located where it was from a list of reasons provided.

37% responded that the nature of the site/premises was the main reason, down 2 points on 2018, with 36% saying they live locally/owners' hometown (up 5 points), and it was historic, been there for years at 33% (down 3 points). Exactly a quarter stated it was the proximity of their customer base.

6% of those surveyed gave other reasons why their company located to where it was, and these are listed in Appendix E.

Stratford town businesses were more likely to state the following reasons for its location: historic/been here for years; and the owners' hometown/live locally; whereas businesses outside the town were more likely to be located for the nature of the site/premises.

Independent businesses were more likely to be influenced by location because of the nature of the site and premises than non-independent businesses.

23% of businesses with six or more full time staff were more likely to indicate the access to the main road network as a reason for location, compared with 14% for smaller businesses. The availability of a suitable workforce and historic reasons were more important to larger businesses personnel wise. Those with less than six full-timers were more likely to be in proximity to their customers and the affordability of rats and rents.

Table 8: Main reasons why company located where it is

Reasons	2013 %	2016 %	2018 %	2023 %
Nature of the site/premises	54	54	39	37
Owners' hometown/live locally	-	-	31	36
Historic/been here for years	-	-	36	33
Proximity to customers	27	28	21	25
Affordability of rents/rates	-	-	-	17
Access to main road network	14	15	13	16
Quality of the environment	20	18	16	15
Nature of local economy	14	14	11	11
Availability of suitable workforce	10	9	5	9
Availability of local facilities	5	4	3	6
Availability of broadband	3	6	3	4
Availability of public transport	-	-	-	3
Proximity of suppliers	3	3	3	2
Availability of local housing	3	2	1	1
Incubator services/support	-	-	-	<1
Other	17	16	10	6
Base:	**(884)**	**(901)**	**(861)**	**(711)**

4.2.2 Size of Site

In floor space terms on the site, 45% had less than 250 square metres, 1 percentage point down from the 46% in 2018. 7% of those surveyed had a very large total floor space in excess of 5,000 square metres.

17% of businesses with more than 5 full-time staff had a total floor space of less than 250 square metres, compared to 57% of those with up to 5 full-time staff. 19% of businesses with more than 5 employees had a floor space more than 5,000 square metres.

Table 9: Total floor space on site

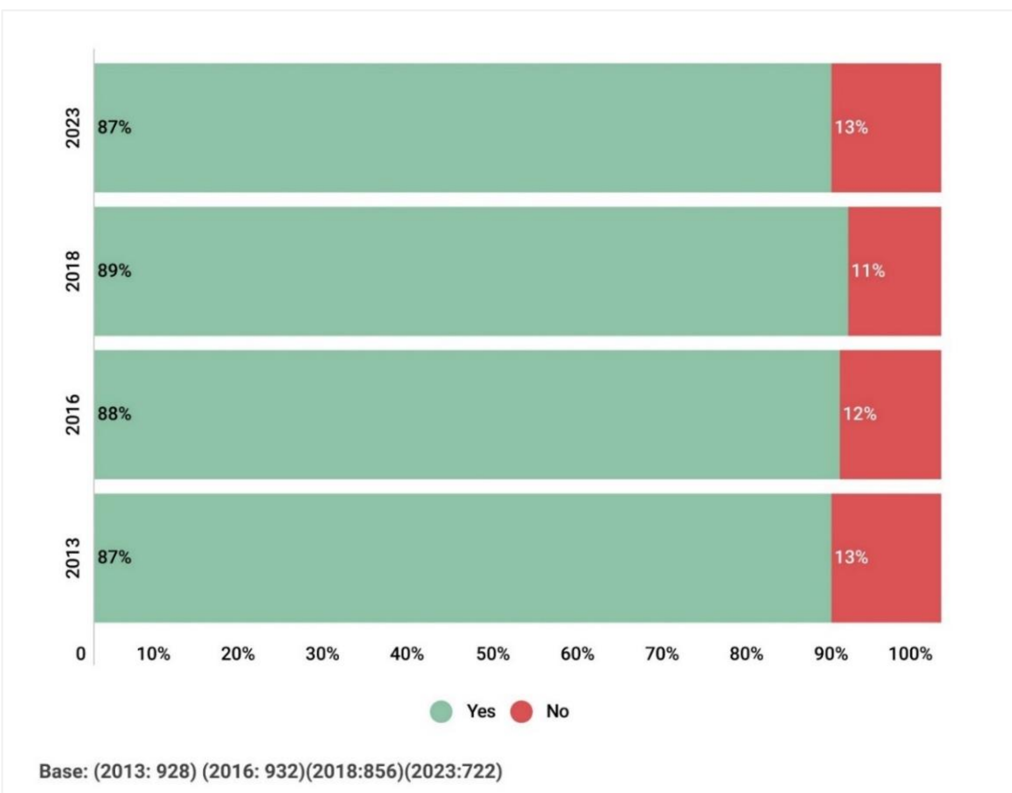
Total Floor Space	2013 %	2016 %	2018 %	2023 %
Less than 250 square metres	50	49	46	45
250 – 500 square metres	20	18	18	16
500 – 1,000 square metres	14	13	13	13
1,000 – 5,000 square metres	13	14	16	20
More than 5,000 square metres	4	6	7	7
Base:	**(827)**	**(848)**	**(771)**	**(651)**

4.2.3 Intentions for Future

Almost nine out of ten businesses (87%) felt their premises were suitable for their current or future likely needs. This represented a decrease of 2 percentage points on the 2018 figure.

19% of businesses with six or more full-time staff felt their premises were not suitable.

Figure 3: Is your premises suitable for current or likely future needs?



72% of those surveyed felt their floor space may see no significant change in the next 10 years: 3 percentage points down on the previous survey. 13% thought it would increase by 10% to 15%, slightly higher than earlier surveys. 5% felt there may be an increase of more than 100%, which was one point less than in 2018. 6% of businesses felt the floor space would need to be reduced.

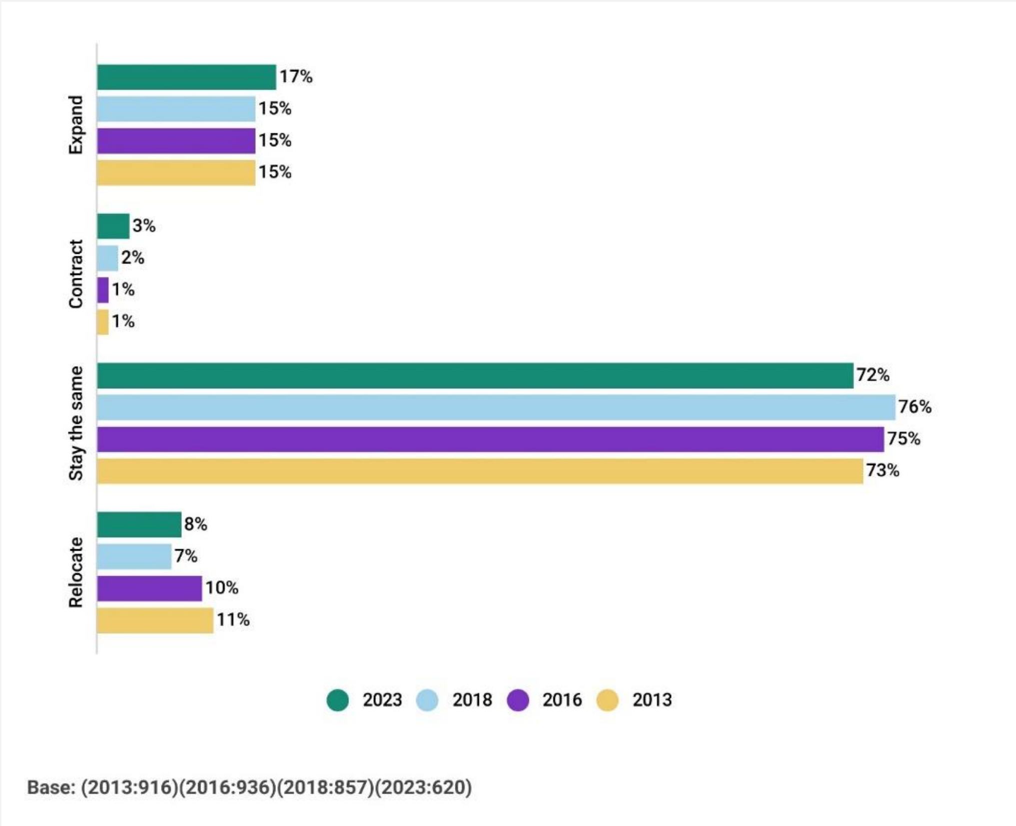
9% of businesses employing more than five full-time staff said their floor space requirement may increase by 50% to 100%. Comparing larger and smaller businesses, 64% businesses with up to five employees compared to 50% with more than five employees felt there would be no significant change.

Table 10: Amount that company's floor space requirement may change in the next 10 years.

Floor Space Requirements	**2013 %**	**2016 %**	**2018 %**	**2023 %**
Increase by more than 100%	6	6	6	5
Increase by 50% - 100%	5	6	5	5
Increase by 10% - 50%	11	11	11	13
No significant change	75	74	75	72
Decrease by 10% - 50%	2	2	3	4
Decrease by 50% - 100%	1	1	2	2
Base: (excluding don't know)	**(916)**	**(815)**	**(737)**	**(594)**

Businesses were asked for their intentions about their current location. Just under three quarters (72%) felt they were likely to stay at the current location, which was lower than in the previous three surveys, 17% were thinking of expansion, 2 points higher than in 2018, 8% were interested in relocation and 3% said their intention was to contract.
Around a quarter of businesses (22%) with more than five full-time employees were intending to expand, against 13% with five or less full-time staff. 67% of businesses employing up to 5 full-timers, versus 53% of those with 6 or more full-time employees, intended to stay the same.

Figure 4: What are your intentions with regard to your current business location?



4.2.4 Problems Faced at Location

Respondents were asked to indicate up to three main problems faced by their company at their location from a given list of problems.

More than half of businesses (54%) stated that the main problem that affects the operation of their business was rising costs), up 11 percentage points from the previous survey in 2018. 29% stated business rates, down two points on 2018.

Staffing problems are more prominent in 2023. The problem of staff recruitment and retention has risen from 7% in 2013 to 24% ten years later. Similarly, the shortage of skilled staff has risen from 10% in 2013 to 23% in 2023.

23% mentioned the availability of parking for staff/visitors and 18% the broadband/mobile phone coverage, that was a lessening problem, down 7 points on 2018. 18% of businesses stated road /traffic congestion, which is 5 points less than 2018.

There were significant differences highlighted when comparing where the business was located. Those in Stratford town were more likely to face problems surrounding road/traffic congestion (30%), the availability of parking (33%), whereas those outside Stratford town cited broadband/mobile phone coverage (22%).

Staff recruitment/retention, a shortage of skilled staff and business rates were more likely to be problems faced by larger companies in terms of the number of staff.

Table 11: Main problems faced by company

Main problems	2013 %	2016 %	2018 %	2023 %
Rising costs	57	40	43	54
Business rates	-	-	31	29
Staff recruitment/retention	7	17	21	24
Availability of parking for staff/visitors	-	-	27	23
Shortage of skilled staff	10	14	20	23
Broadband/mobile phone coverage	-	-	25	18
Road/traffic congestion	12	24	23	18
Public transport options	-	-	-	15
Market demand/competition	25	20	20	13
High labour costs	5	5	11	13
Legislation/red tape	15	13	15	12
Impact of Brexit	-	-	17	11
Cost of suitable premises	14	16	12	11
Planning constraints	11	11	11	9
Need for improved marketing	9	8	7	8
Lack of suitable premises	8	10	10	7
Investment constraints	6	3	4	4
Infrastructure problems	5	9	7	3
Currency exchange rate	3	3	5	3
Access to appropriate advice	1	1	1	2
Other	16	19	8	7
Base:	**(803)**	**(829)**	**(818)**	**(662)**

40 'other' reasons were given as problems faced by the company. Of these, issues relating to roads were the most mentioned problem. These included a few responses mentioning the closure of the bridge at Welford-on-Avon as being a significant problem for their business.

Table 12: Other Main Problems Faced by Company

Other problems	Nos of Responses
Road Issues: Maintenance, closures, parking etc	11
Building constraints e.g. Listed building, lease length, location	8
Finances and Funding	4
Losing customers/competition	3
Town centre issues e.g. ASB	3
Owner retirement	3
Flooding/development issues	3
BID/strategy	3
Lack of banking services	2
Too expensive for staff to live here	1
Base:	**(40)**

Businesses were asked what they felt was the **biggest impediment** to the growth of their businesses out of all the problems which they faced now. This was a new question for 2023, so there are no comparable responses from previous surveys. 349 responses were given, and these are summarised in the table below. The biggest impediments to growth were costs and staff recruitment.

Table 13: What is the biggest impediment to growth for your business?

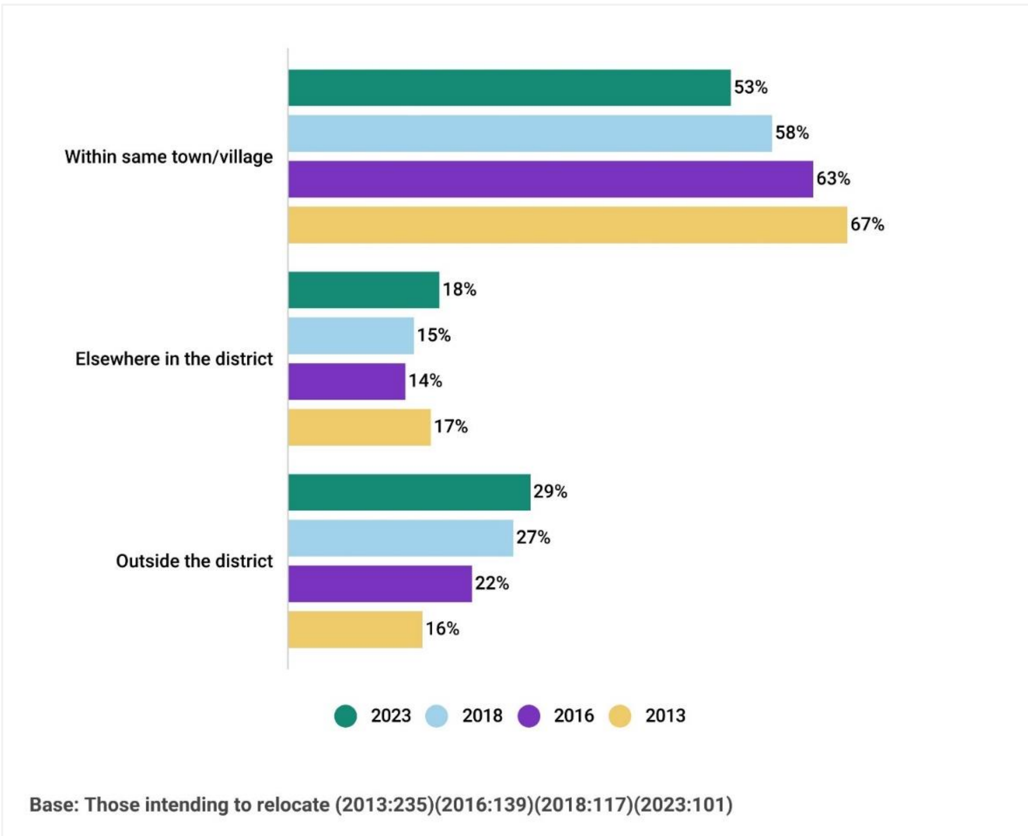
Biggest Impediment	**Number**	**%**
Costs	95	29
Staff recruitment – lack of skills, expensive area to live	64	19
Losing customers/customers not spending	39	12
The economy generally	39	12
Premises issues	24	7
Finance	19	6
Parking	16	5
Competition	14	4
Planning	14	4
Roads	12	4
Transport	12	4
Marketing	11	3
Brexit	9	3
Covid	9	3
Owner-related issues	9	3
Government/local gov policies	8	2
Broadband	5	2
Town centre issues	5	2
Regulations	4	1
None	20	6
Other	16	5
Base:	**(329)**	

4.2.5 Relocation

Businesses were asked, if the company intends to relocate, where they wish to move to. Excluding those who do not know or were not sure, 53% wished to move within the same town or village; 18% said elsewhere in the district and 29% outside the district. There has been a general trend over the last ten years away from relocating within the same town or village and towards relocating outside the district (see Figure 5). Those who responded they would look to relocate outside the district were asked to specify where. 35 responses were received, which can be read in full in Appendix F.

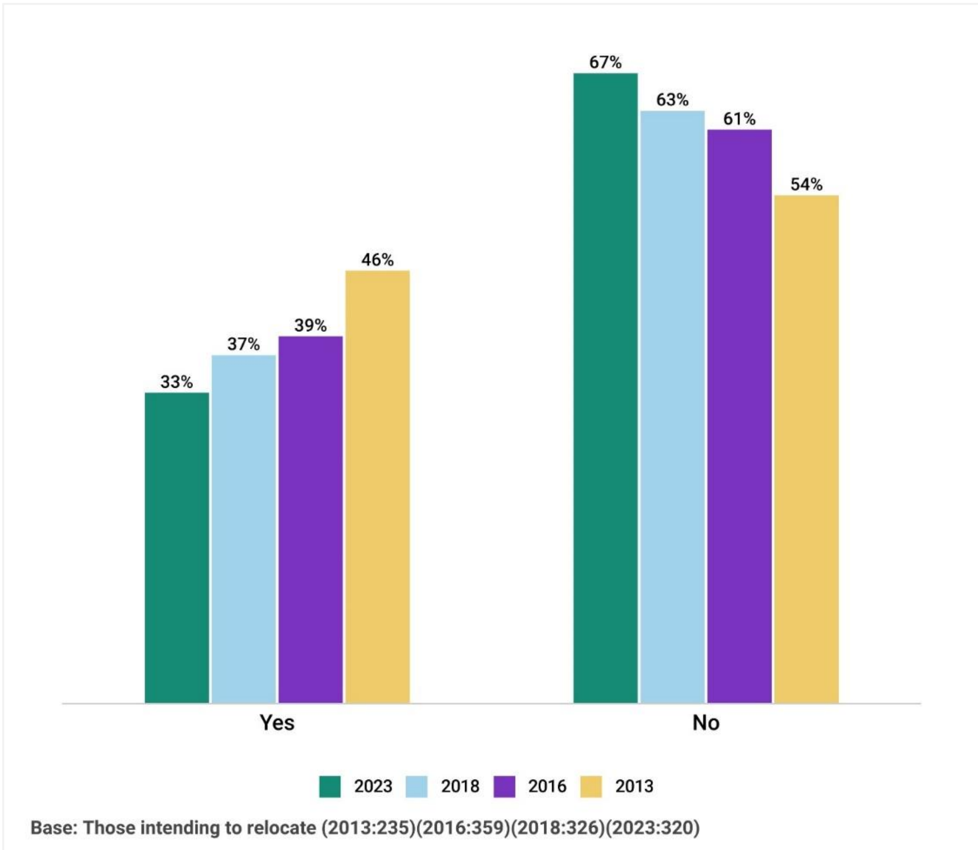
Those businesses based in Stratford Town were more likely to relocate within the town (22%) than those in the rest of the district relocating to the same town or village (10%).

Figure 5: Where would your business relocate to?



Asked if their company wished to relocate in Stratford District, 33% thought there were suitable sites or premises available, down by 4 percentage points from the 37% recorded in 2018 and 13 points lower than 2013.

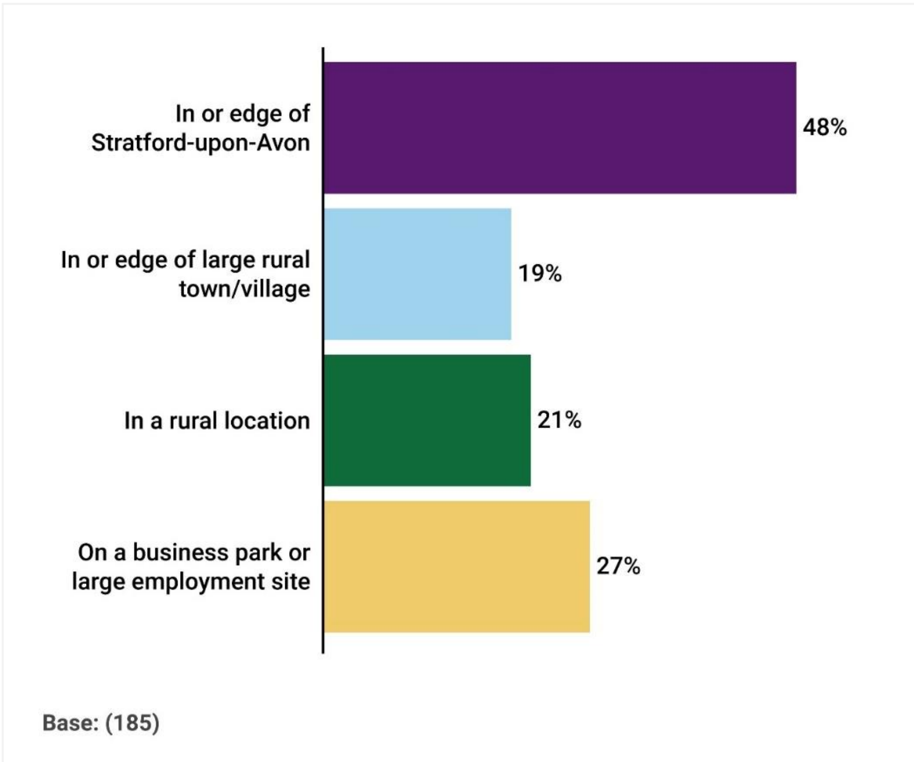
Figure 6: Is suitable premises available within the district if you wish to relocate?



If businesses felt there were no suitable sites or premises available, 48% would look at the edge of or inside of Stratford-upon-Avon, 19% in or on edge of a large rural town or village, 21% would look at a rural location and just over a quarter (27%) a business park of large employment site. A full list of locations is included in Appendix G (29 responses).

70% of Stratford town-based businesses said if no suitable sites or premises available, they would look in or on the edge of Stratford-upon-Avon, as opposed to 30% of those based outside of the town doing so. 26% of businesses based out of town would look in or on the edge of a large rural town / village, versus 12% of Stratford based businesses doing likewise.

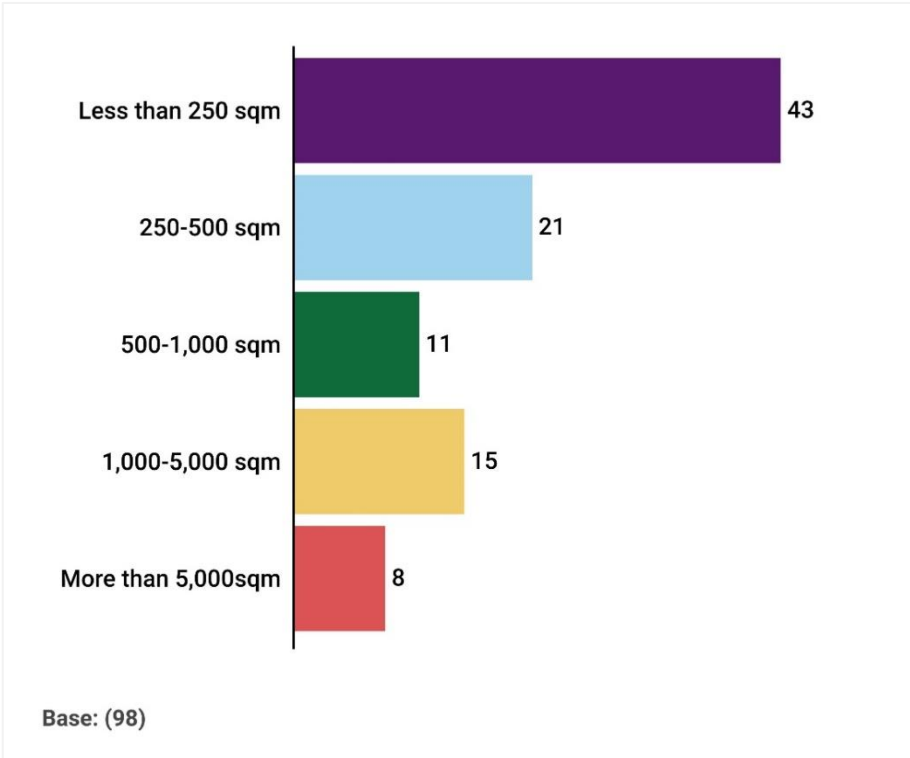
Figure 7: If no suitable business premises exists, where would you want them to be provided in the district?



Those looking to relocate were asked about the size of premises they would look to relocate to. 44% of businesses would look at something less than 250 square metres. 21% would look at 250 to 500 square metres and 11% 500 to 1,000 square metres. 8% would look at more than 5,000 square metres.

59% of businesses with up to five full-time staff would be looking at premises with less than 250 square metres. Conversely, 27% of those with more than five full-timers would relocate to premises with more than 5,000 square metres.

Figure 8: What size premises are you looking for?



Businesses were asked if they would like to receive more information from Stratford District Council and employment site agents and developers to support their future growth plans. 109 businesses said they did require this information, with 70 providing contact details.

4.3 Stratford as an Area for Business

4.3.1 How area can be improved for business.

Respondents were asked how the area can be improved to assist businesses and the economy from a list provided.

Reduce business rates and other charges remained the most popular option, with the percentage opting for it increasing by 5 percentage points from 49% in 2018 to 54% now. Improving the road network fell by 3 points at 39% and 35% wished for improved public transport, 6 points higher than 2018. Improvements to broadband connections fell sharply from 41% in 2018 to 28% in 2023.

Businesses wanting more parking spaces fell from 37% in 2018 to 28% in 2023. The same percentage wanted the provision of more affordable business units.

Looking at where the business was located saw some significant differences in the possible improvements. Those based in Stratford town were more likely to suggest an improvement to the road network (56%), want more available parking spaces (39%), a reduction in parking charges (45%) and provide more affordable business units (35%). Outside Stratford town businesses were more likely to say there was a need for an improvement in broadband connections (30%).

Table 14: How area can be improved to assist business and the economy

Improvements	2013 %	2016 %	2018 %	2023 %
Reduce business rates & other charges	79	68	49	54
Improve the road network	27	43	42	39
Improve public transport	27	31	29	35
Improve broadband connections	42	43	41	28
More available parking spaces	-	-	37	28
Provide more affordable business units	-	-	-	28
Reduce parking charges	-	37	27	26
Provide more business support & advice	-	13	22	16
Improve local environment	17	13	11	14
Provide more housing	18	12	11	12
Improve training & skills	12	10	10	11
Provide more employment land	10	11	11	8
Provide more business advice	9	8	7	7
Sufficient energy supply	-	-	-	7
Improved logistics/freight infrastructure	-	-	-	4
More scale-up space	-	-	-	2
Other	15	9	8	8
Base:	**(852)**	**(856)**	**(797)**	**(650)**

The other improvements suggested (52 comments) are summarised below.

Table 15: Other suggested improvements (3 or more responses)

Other Improvements	No of Responses	%
Make town/village centre more attractive	7	13
More/better parking	7	13
Improve Planning System/Speed up process	6	12
Roads & traffic	6	12
Green infrastructure, sustainability	4	8
Greater diversity of businesses	3	6
Housing	3	6
Mobile/broadband	3	6
Rates/tax/costs	3	6
Other/Nothing	14	27
Base:	**(52)**	

Respondents were asked to comment on the one piece of infrastructure they would wish to see improved in the district and why. 352 responses were made, and these are summarised in the table below.

The most common response was that roads and the road system in the District should be improved. These comments revolved around a handful of key issues:

- Better maintenance of the roads themselves, dealing with potholes for example
- The road system being inadequate and needing additional roads, particularly around Stratford-upon-Avon.
- Concerns about safety on the roads, relating especially to speeding.
- Traffic congestion seen as a major problem.
- Too many road works.
- Traffic lights causing delays because they are not timed correctly.
- Further crossings across the River Avon required.

Table 16: Infrastructure which should be improved (3 or more responses)

Infrastructure	No of Responses	%
Roads	156	44
Public transport generally/buses	57	16
Broadband/mobile signal	32	9
Parking	30	9
Town centres	20	6
Train system	15	4
None	12	3
Cycle/footpaths	8	2
Costs	7	2
Business premises	6	2
Housing	5	1
Energy	4	1
Water	4	1
Facilities e.g., health	3	1
HS2	3	1
Planning	3	1
Miscellaneous	16	5
Base:	**(352)**	

4.3.2 Rating of Area for Business

Businesses were asked to rate the District as a place to do business. 57% rated the area as very good or good, which was 6 percentage points down on the last two surveys. 37% said it was average, an increase of 5 points. 5% answered poor or very poor, consistent with previous years.

Business based in Stratford town were more likely to rate the district as very good against the rest of the district, 20% versus 13%. Non-independent businesses were more likely to rate the district as very good, 19% versus 13%.

Figure 9: How do you rate Stratford-on-Avon District as a place to do business?

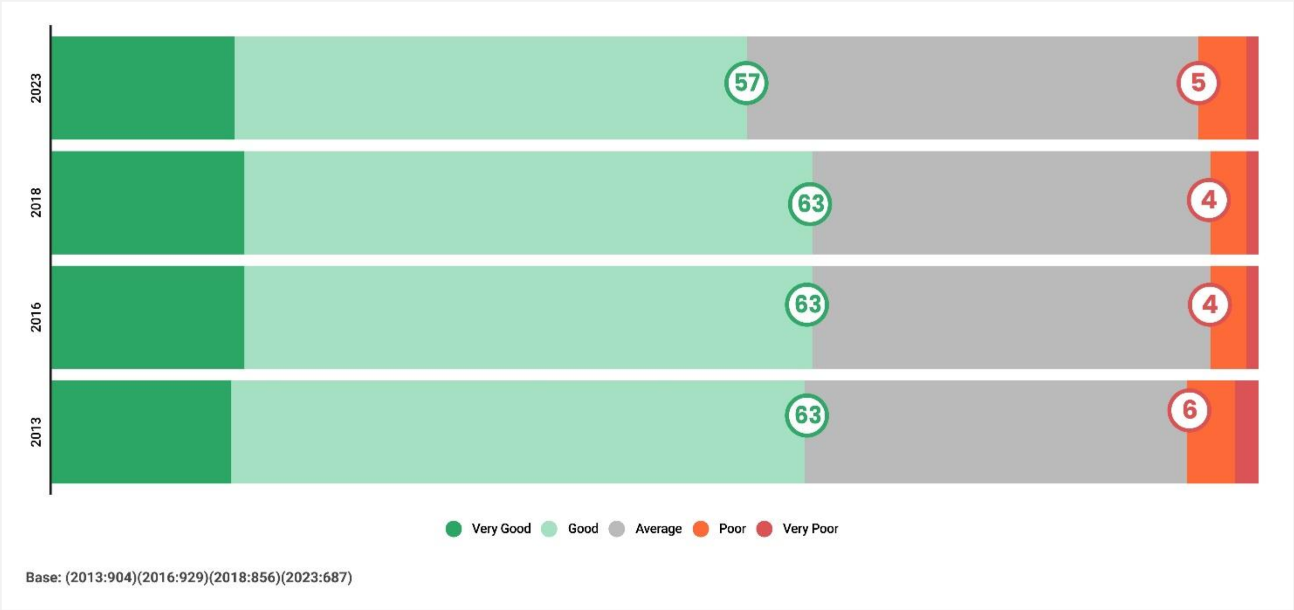


Table 17: Rating of Stratford District as a place to do business

Rating	2013 %	2016 %	2018 %	2023 %
Very Good	15	16	16	15
Good	48	47	47	42
Average	32	33	32	37
Poor	4	4	3	4
Very Poor	2	1	1	1
Base:	**(904)**	**(929)**	**(856)**	**(687)**

Businesses were asked why they rated Stratford district as a place to do business. The reasons are summarised in the table below.

Negatively the high rates and the lack of support/Council policy or action was mentioned 23 and 22 times respectively.

Positively for a place to do business, it was the location (32 mentions) and the attractiveness of the District to tourists (30) top of the tree.

Table 18: Why they rated Stratford District as average, poor or very poor (negative comments)

Reasons for rating - negative	No of Responses	%
Rates	23	7
Lack of support/Council policy or action	22	7
Parking	13	4
Planning	11	3
Transport	10	3
Rent	10	3
Access/road network	9	3
Customers/lack of demand	9	3
Markets	9	3
Shops	9	3
Tourism	9	3
Deteriorating town centre	7	2
Too Stratford-centric	7	2
Staffing issues	6	2
Broadband/mobile	5	2
Traffic	5	2
Expensive area	4	1
Premises	4	1
Costs	3	1
Miscellaneous	5	2
Base:	**320**	

Table 19: Why they rated Stratford District as average, good or very good (positive comments)

Reasons for rating - positive	No of Responses	%
Location	32	10
Attractive to tourists	30	9
Pleasant/physical environment/nice place	22	7
Good customers	21	7
General positive comments	20	6
Accessibility	19	6
Council is supportive	19	6
It is an affluent area	13	4
Infrastructure/facilities	6	2
Not experienced any issues	5	2
Have been established a long time (so must be good)	4	1
Safe	4	1
Small business rates relief	4	1
Low costs	3	1
Economic environment	3	1
Parking	3	1
Staff	3	1
Costs	3	1
Miscellaneous	6	2
Base:	**320**	

There were also 40 comments which expressed neither a positive nor negative opinion: 14 of these said that they had no experience of other Districts for comparison, 17 made a general comment and 9 responses related to miscellaneous topics.

4.3.3 Support

Businesses were asked what the most important form of support was they would welcome from Stratford-on-Avon District Council and business support organisations which they felt was not catered for. There were 231 responses with a response (excludes none etc) which are summarised in the table below.

Although asked for specifically support required from SDC/business support organisations, respondents did answer the question more generally about the problems in the District.

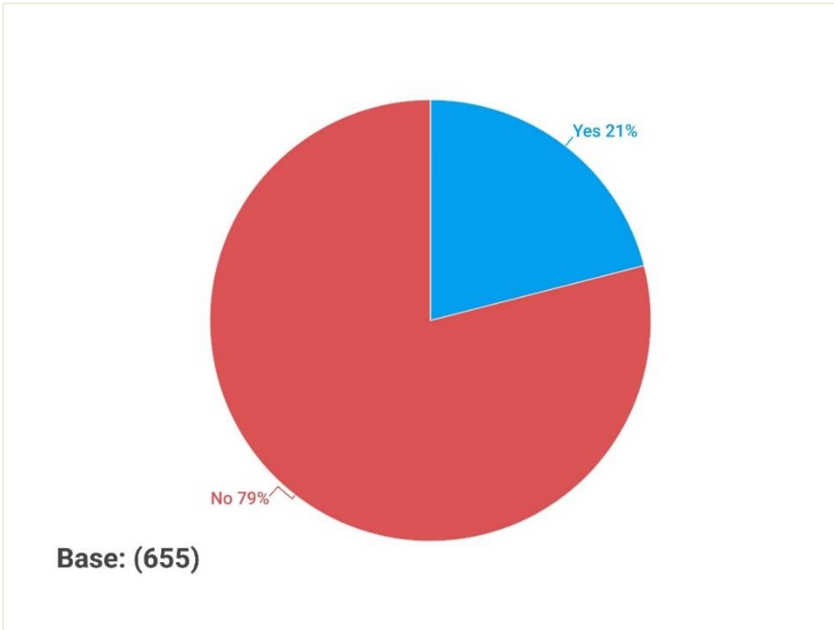
The major support required from SDC is rates relief help in terms of making them affordable.

Table 20: Form of support welcomed from SDC

Response (2 or more)	**No of Responses**	**%**
Reduce /affordable rates/relief/rates help	51	22
Grants/Funding	20	9
Parking	19	8
Advice/Talk	19	8
Advertising/Marketing	18	8
Transport	15	7
Support	10	4
Affordable Business Units/Ability to move/Develop opportunities	7	3
Training	6	3
Markets	6	3
Events	6	3
Traffic	6	3
Planning Decisions/Applications	5	2
Planning advice	4	2
Improved broadband	4	2
Building	3	1
A voice	2	1
Recruitment	2	1
Networking	2	1
Climate change	2	1
Other	72	31
Base:	**231**	

21% of business were aware of existing enterprise centres located in Stratford district. Those in Stratford town were more aware (28%).

Figure 10: Are you aware of existing enterprise centres located in Stratford District?



4.4 Coventry and Warwickshire Growth Hub

The Coventry & Warwickshire Growth Hub is a fully funded, single point of contact providing businesses with a front door to available support to help overcome barriers to growth.

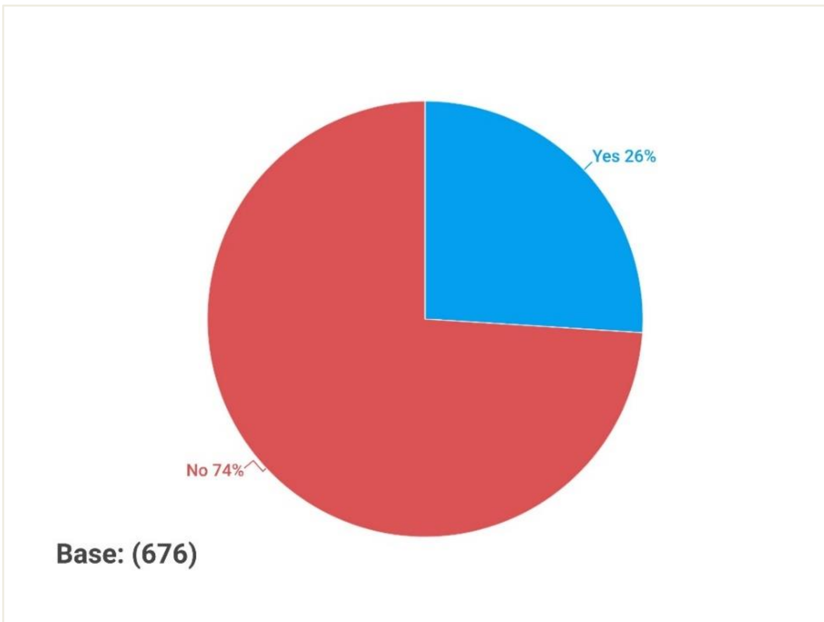
Linking to regional and national support programmes and services, the Growth Hub can assist with access to finance and grants, skills, training and recruitment support, guidance with property and planning issues and much more.

Using a thorough diagnostic approach, the Growth Hub's team of dedicated Account Managers can understand business challenges and plug into relevant support programmes and offer ongoing assistance.

4.4.1 Support from Coventry and Warwickshire Growth Hub

Businesses were asked if they were currently looking for free support to overcome any challenges/barriers to growth. 176 businesses (26%) said they were.

Figure 11: Requiring Support from Growth Hub



58% requiring support wanted it on access to finance, 36% on growth plans and 34% on skills and training.

The responses to “other” are included in Appendix H.

Table 21: Areas Requiring Support

Improvements	**Number**
Access to finance (including grants)	102
Growth plans	63
Skills and training	59
Recruitment	47
Property & planning	42
International trade	14
Start up support	12
Other	14
Base: (Those looking for support)	**(176)**

102 businesses or 17% of those surveyed wanted to discuss the issues with other similar businesses at networking or peer to peer events. 140 businesses or 23% wanted to speak to a member of the Growth Hub team to learn more about how they could help their business.

4.5 Business Rates

4.5.1 Contacting the Council

Businesses were asked if they pay business rates (NNDR). 406 or exactly 60% answered they did.

Businesses who paid rates were then asked if they had contacted the Council in the last 12 months about business rates. Exactly a quarter had done so (98 businesses).

Respondents who had contacted the Council about business rates in the last 12 months were asked if they did so by telephone, to which 64% had done so. This is six points lower than the 2018 figure. Smaller businesses more likely to make contact.

Table 22: When you contacted the Council in the last 12 months about NNDR, did you telephone?

Contacted by telephone	2013 %	2016 %	2018 %	2023 %
Yes	77	75	70	64
No	23	25	30	36
Base: (Those contacting the Council in the last 12 months about NNDR)	**(227)**	**(189)**	**(174)**	**(97)**

Those who had telephoned SDC in the last 12 months about business rates were asked to indicate their level of agreement with a range of statements.

"The telephone call I made to the Council was answered quickly".

41% of those surveyed agreed with the above statement, as opposed to 41% who disagreed. This was the lowest level of agreement throughout the periods studied. It was a 25-point drop on 2018. Disagreement rose from 15% to 41%.

Figure 11: The telephone call was answered quickly...

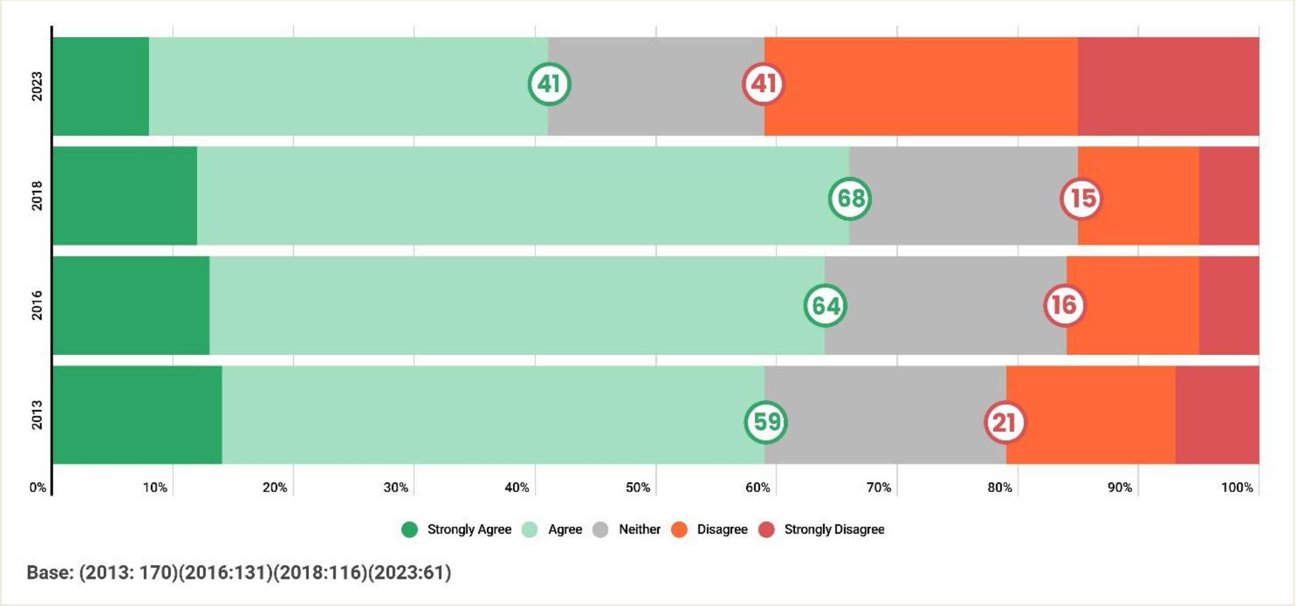


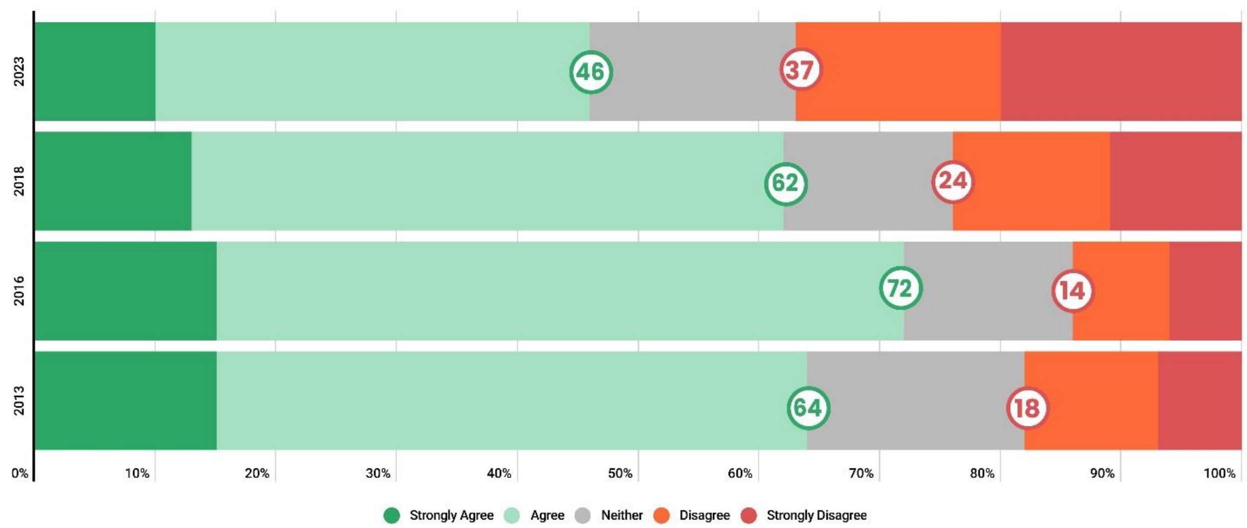
Table 23: The telephone call was answered quickly…

Rating	2013 %	2016 %	2018 %	2023 %
Strongly Agree	14	13	12	8
Agree	45	51	54	33
Neither Agree nor Disagree	20	20	19	18
Disagree	14	11	10	26
Strongly Disagree	7	5	5	15
Base: (Those telephoning)	**(170)**	**(131)**	**(116)**	**(61)**

"Once the call to the Council had been answered, my query was dealt with swiftly".

46% of businesses agreed or strongly agreed with the above statement compared to 37% who disagreed. The agreement level was 16 points lower than that recorded in 2018 and 26 points less than 2016. Disagreement rose from 24% to 37%.

Figure 12: My query was dealt with swiftly...



Base: (2013:168)(2016:127)(2018:115)(2023:59)

Table 24: My query was dealt with quickly…

Rating	2013 %	2016 %	2018 %	2023 %
Strongly Agree	15	15	13	10
Agree	49	57	49	35
Neither Agree nor Disagree	18	14	14	17
Disagree	11	8	13	17
Strongly Disagree	7	6	11	20
Base: (Those telephoning)	**(168)**	**(127)**	**(115)**	**(59)**

"Overall, I am satisfied with the telephone service provided by the Council".

40% were satisfied with the telephone service provided by the Council, a drop of 23 points on 2016. Disagreement rose from 20% in 2018 to 35% in 2023.

Figure 14: Overall I am satisfied with the telephone service provided by the Council...

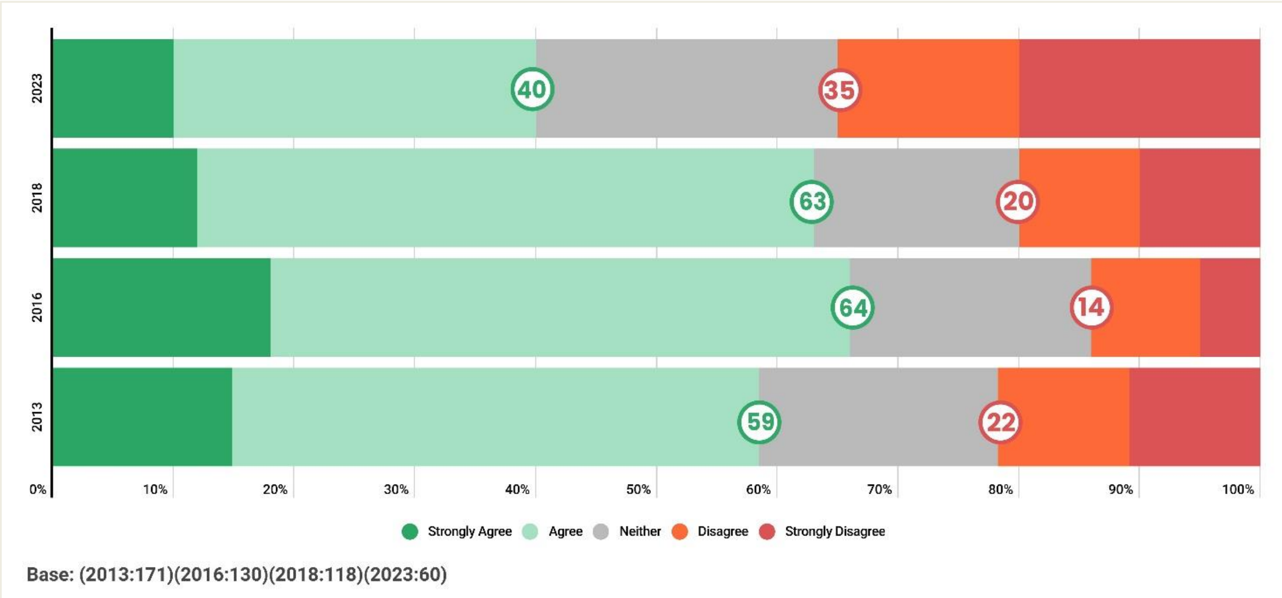


Table 25: Overall I am satisfied with the telephone service provided

Rating	**2013 %**	**2016 %**	**2018 %**	**2023 %**
Strongly Agree	15	18	12	10
Agree	44	48	51	30
Neither Agree nor Disagree	20	20	17	25
Disagree	11	9	10	15
Strongly Disagree	11	5	10	20
Base: (Those telephoning)	**(171)**	**(130)**	**(118)**	**(60)**

4.5.2 Awareness of rate reliefs

A very high proportion (93%) of those surveyed were aware of the Small Business Rate Relief compared to small percentages of businesses knowing about some of the other rate reliefs currently available to them, for instance, 10% of Discretionary Rate Relief. Since the last survey the retail, tourism, hospitality, and leisure rate relief were brought in, of which 19% were aware of this specific relief.

Table 26: Awareness of the rate reliefs currently available to businesses

Rate Relief Type	2013 %	2016 %	2018 %	2023 %
Small Business Rate Relief	98	97	96	93
Retail, tourism, hospitality, leisure Rate Relief	-	-	-	19
Discretionary Rate Relief	10	7	13	10
Discretionary Rural Rate Relief	6	4	5	5
Mandatory Rate Relief	6	4	8	4
Mandatory Rural Rate Relief	5	4	4	4
Hardship Rate Relief	6	4	5	3
Pub Relief	-	-	4	3
Local discretionary discount scheme	-	-	6	2
Section 44a Partly Occupied Relief	7	3	4	1
Base:	**(691)**	**(731)**	**(681)**	**(364)**

4.5.3 Applying for rate reliefs

86% of businesses confirmed they had applied for the Small Business Rate Relief, although few had applied for other rate reliefs such as Discretionary Rate Relief (4%) and Mandatory Rate Relief (2%). This is consistent with other years. For the new retail, tourism, hospitality, and leisure rate relief, 19% had applied for it.

91% of businesses with one to five full-time staff had applied for Small Business Rate Relief. In terms of retail, tourism, hospitality, leisure rate relief, 38% of those with 6 or more full time staff had applied, compared with 14% of smaller businesses.

Table 27: Whether applied for any of the rate reliefs currently available to businesses.

Rate Relief Type	2011 %	2013 %	2016 %	2018 %
Small Business Rate Relief	95	95	94	86
Retail, tourism, hospitality, leisure Rate Relief	-	-	-	19
Discretionary Rate Relief	3	2	3	4
Mandatory Rate Relief	2	1	1	2
Mandatory Rural Rate Relief	1	1	2	1
Discretionary Rural Rate Relief	1	1	1	1
Local discretionary discount scheme	-	-	-	0
Hardship Rate Relief	2	2	1	1
Pub Relief	-	-	-	1
Section 44a Partly Occupied Relief	2	2	1	0
Base:	**(550)**	**(536)**	**(556)**	**(252)**

4.5.4 Comments about the NNDR process through the Council

101 comments were supplied about the NNDR process through the Council and these are summarised in the table below.

The comments highlighted a general lack of awareness and confusion over the different reliefs which were available and could be applicable to their businesses. Several respondents thought that they were receiving reliefs automatically; a number were not and stated that they felt the process *should be* automatic. When businesses did apply for reliefs or reductions, they faced difficulties such as with the Valuation Office taking a very long time to respond, SDC also being slow on occasion, issues with errors in bills needing correction, and communication generally being poor.

Table 28: Comments about the NNDR process

NNDR	**No of Responses**	**%**
Not applicable (e.g., H/O deals with this)	16	16
Not aware of any available reliefs or support	10	10
Dealings with SDC have been good/OK	9	9
Lack of information on what's available	8	8
Dealings with SDC have been poor	8	8
Would like to know more about what's available	8	8
Communication is poor	7	7
Rates are too high	7	7
Unsure	7	7
Rateable value has been appraised up/rates have been increased	6	6
Slow	5	5
Errors	4	4
Lack of support	4	4
Problems with Valuation Office	4	4
Automatically applied	3	3
Has not applied	3	3
Staff helpful	3	3
Already receiving reliefs	2	2
Staff unhelpful	2	2
Base:	**101**	

Appendices

SDC Business Survey 2023 Literals

Appendix A: If ticked on the edge/close to a town or village, please specify closest settlement.

66 responses

Alcester
Alderminster
Alderminster
Alderminster
Alderminster
Alderminster
Ardens Grafton
Ashorne
Ashorne
Aston Cantlow
Atherstone on Stour
Atherstone on Stour
Atherstone-on-Stour
Banbury
Barton on the Heath
Bearley
Bearley Road, Snitterfield
Bidford on Avon
Bishops Itchington
Blackwell nr Shipston on Stour
Blackwell nr Shipston on Stour
Brailes
Broom
Claverdon
Claverdon
Claverdon
Claverdon
Claverdon
Clifford Chambers
Darlingscott
Earlswood
Earlswood
Earlswood
Fenny Compton
Gaydon
Long Itchington
Long Itchington
Long Itchington

Long Marston
Long Marston
Long Marston
Loxley
Napton
Napton on the hill
Newbold on Stour
Pitchill/Rushden
Priors Hardwick
Priors Marston
Salford Priors
Snitterfield
Snitterfield
Stockton
Stockton
Stockton
Stockton Village
Stratford upon Avon
Tredington
Tysoe
Ufton
Warmington
Welford on Avon
Whatcote
Whichford
Wootton Wawen
Wootton Wawen
Wootton Wawen

Appendix B: If ticked rural location/elsewhere within the district, please specify.

88 responses

Alscot Estate
Alveston
Alveston
Alveston
Arden industrial estate
Barton
Between Banbury and Southam
Between Stockton/Napton
Bird Business Park, Long Marston
Chesterton
Claverdon
Clifford Chambers
Compton Verney
Dodwell
Earlswood
Earlswood
Earlswood
Earlswood
Earlswood
Edgehill
Edstone
Edstone, Wotton Wawen
Ettington
Farnborough
Fenny Compton
Gaydon
Goldicote
Gorcott Hill
Great Alne
Great Alne
Harbury
Hatton Rock
Lighthorne
Lighthorne
Lighthorne Heath
Little Compton
Long Compton
Long Compton
Long Compton
Long Compton
Long Itchington

Lower Brailes
Lower Quinton
Lower Tysoe
Mappleborough Green
Mickleton
Mickleton
Napton
Napton on the Hill
Newbold on Stour
Offchurch (not in Stratford)
Oxhill
Oxhill
Oxhill
Pillerton Priors
Pillerton Priors
Radway
Redhill
Salford priors
Salford Priors
Salford Priors
Sambourne
Shipston and Stratford upon Avon
Stockton
Stratford Agri Park CV37 8LP
Tanworth in Arden
Tanworth-in-Arden
Tanworth-in-Arden
Temple Grafton
Tysoe
Tysoe
Tysoe
Tysoe
Tysoe
Ufton
Ufton Warwickshire
Ullenhall
Ullenhall/Beoley
Welford
Welford on Avon
Wootton Wawen
Wootton Wawen

Appendix C: What is the status of your business at this location? Other

23 responses

2 site business
Academy
Charity
Community Benefit Society
Community hall
Community Interest Company
Community store run by volunteers
Family run business 1 of 2 stores
Farm
Farming
FRANCHISE
Independent with 5 other branches
Limited
Limited Company
Livery Yard
Main Site; ADDTL Business in Wolverhampton
Premises currently empty under refurb.
Roman Museum
Storage/Distribution
Team of self-employed guides managed by J & H Hogg
Touring caravan site - 5 pitches
Volunteer run museum
Workshop

Appendix D: What is the main business activity at this location? Other

140 responses

Admin/Marketing
Administration
Administration
Administrative and support services for our Retail/Reselling business
Advertising
Advertising
Aesthetic clinic
Aesthetics clinic
Agents for machine sales
Agricultural contractors
AGRICULTURAL MACHINERY
Agriculture
Animal care
Antique restoration
Arborcultural contracting business
Auction House
Audio rising and CCTV installation
Aviation museum
Barber shop
Barbering Service
Barbers
Beauty
Beauty
Beauty services
Bicycle workshop
Boarding Cattery
Boarding Cattery and Kennels
Boarding kennels
Branded Merchandise
Campsite
Campsite
Cattery
Charitable organisation
Charity
Charity
Charity
Charity/Retail
Classic Car Auction House
Clock repairs
Clothing alteration

Day cover for LD & Autism
Dental Practice
Dentist
Design consultancy
Dog boarding kennels
Dog grooming
E commerce packing and distribution
Electrical Sound & AV
Electrical sounds AV
Elite sports supplier and installer
Energy Project Development
Equestrian
Estate Agency
Estate Agent
Estate Agent
Estate agents
Event management/conference production/hospitality
Farming
Flight school
Flight training education
Flood defence survey
Food manufacture
foot care
Geotechnical consultancy
Golf Course
Golf Course
Hair and Beauty
Hair salon
Hair salon
Hairdresser
Hairdresser
Hairdresser
hairdresser/massage/holistic
Hairdressers
Hairdressing
Hairdressing
Health
Health
Health - chiropractic clinic
Health & Social Care
Health and Wellbeing
Health services
Healthcare

Healthcare
Healthcare
Healthcare
Healthcare
Healthcare
Hire of electrical items
Hire of tools and plant
Horse Livery Yard
Housing Association
Kitchen
Living Yard
Manufacturers Training
Marketing/publishing
Media production
Medical education
Mental Health Services
Metal Cutting Solutions
Mixed
Mixed retail/training
Motor vehicle repairs
Music production/tuition
Office equipment sales
Offices
Painting
Petrol station
Pharmacy
Physiotherapy
Picture Framing
Plant hire company
Podiatry and Chiropody Services
Pond @ lake construction maintenance
Printing
Private swimming teaching school
Property management
Property trading
Pub
Pub/restaurant
Public house
Public house - we sales only
Race horse trainer/stud
Racehorse Training
Real Estate Investment
Repair of Consumer Electronics

River Surveyors
Sales and Distribution
Service, landscape and event sector
Snooker - sports bar
Soft Furnishings
Software development
Sports & Social
Tanning and beauty
Tool hire
Training, promotional event, business support services
Veterinary
Veterinary clinic
Wood yard supplying agricultural and domestic fencing
Wooden goods

Appendix E: What are the main reasons why your business is located here? Other

38 responses

Business was established in 1991, the premises suited the business
3 Miles from office
Active in area
Central location in the UK for all our clients
Central to staff travel
Contract requirement
Contractual
Delivering healthcare services to the village
Established business for over 40 years
Family business been here for 60 years
Finding a suitable workshop for the better rent
Friend recommend
Historical
I live here
It’s a sightseeing tour business focusing on the town centre
It's close to all the employees
Just a livery yard on a very busy road
Legacy. General central location to the UK as a whole and access to main roads
Live at back of shop but no longer trading
Manage the building
My farm and unit
No other tanning in the area.
On South Oxford Canal
Original MD owned landed and built premises
Outside parking for HGVs and light vans. Access to outside road network. Know restricted owing weight limit dropped from 18ton to 3ton on Tomlow Road bridge causing more traffic through Stockton.
Own the land
Previous owners lived locally
Quality of environment was a reason but due to indiscriminate building in the area this is no longer relevant.
Swimming Pool at our home private premises
That's where it was when we bought it.
Took over existing business.
Tourism
Tourism
We are a retail store dependent on location.
We are an equestrian centre so we required land and facilities such that we could not operate anywhere else.
We were forced to move by HS2
We were started in Redditch by our founder and have had a presence here ever since. Circa 25-30% of our staff are based here in Studley

Appendix F: If your business intends to relocate, where does it wish to move to? If elsewhere in the District or outside the District.

33 responses

Alcester
Anywhere but Stratford now
Bigger town
Birmingham
Birmingham or Solihull
Birmingham or Solihull
China
Chipping Norton
Closer to home - Worcestershire
Cov and Warks
Coventry
Coventry
Either London or Birmingham
Ideally somewhere within Stratford-on-Avon district, close to the Cotswolds
In an area where there are more facilities
London
Lower costs/better road access
Move to online only.
Not sure but close to M40 Junction hopefully
Offchurch - already relocated.
Outside the District
Probably Alcester
Redditch/Bromsgrove
Rugby/Coventry
Rural centre with low rent/tax
Shropshire
South Glos
Staffordshire
Still assessing options
Stratford upon Avon
Town centre
Wales
We already have operations in London, Brentford and Belgium and we would seek to expand these

Appendix G: If there are no suitable sites or premises available, where would your business wish them to be located within Stratford-on-Avon District? Please specify location here

29 responses

Alcester
Alcester
Alcester
Alcester or Bidford-on-Avon
Alcester/Studley/Bidford
Alscot Estate or Shipston on Stour
Any rural location with enough land and stables/facilities
Anywhere if moving online
Around Long Itchington
Bidford on Avon
Close to Stratford
Close to Warmington
Cotswolds
Gaydon
Harbury
Kineton
Little Kineton
Near Alcester
Not sure
Oxhill
Previous farm premises with plenty of parking
Redditch
Redditch
Somewhere business rates are so expensive
Southam - needs hard standing
Stockton/Napton parish
Tysoe
Unsure need suitable building regardless of area.
Warwick/Leamington

Appendix H: Is your business currently looking for free support to overcome any challenges/barriers to growth? Other

14 responses

Access to public sector procurement
Broadband
Capital equipment and new product development
General help would be appreciated.
Legal constraints
Marketing
Marketing
Marketing
Marketing and client acquisition
Marketing and promoting businesses
Sales & Marketing
Soon to be planning
Working capital support for growth plans