

# Bognor Regis Business Survey 2018

For Arun District Council

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This research has been carried out in compliance with the International standard ISO 20252, (the International Standard for Market and Social research), The Market Research Society's Code of Conduct and UK Data Protection law

## 1. Background

In 2014, Arun District Council (Arun DC) was awarded funding worth £1.65 million to deliver an enhanced public realm scheme across Bognor Regis town centre. The funding was predicated on the improvement of the public realm creating new jobs, which would be brought about by an increase in spending in the town centre. This would be achieved in two ways; firstly by increasing visitor spend in the town centre, and secondly by encouraging residents of Bognor Regis and the wider area to do more of their shopping in the town.

In order to measure the impact of the enhancement to the public realm and assess whether this led to the creation of jobs, ADC commissioned Qa Research (Qa) to conduct two studies that would act as a baseline measures of visitor and resident spend and the staffing levels and trading confidence levels of businesses. These studies were conducted in 2014, prior to the implementation of the public realm improvements.

In order to measure the impact of the improved public realm Arun DC has commissioned Qa Research (Qa) to repeat the surveys to collect data on the levels of employment by businesses, as well as measures of their economic performance and attitudes to doing business in Bognor Regis following the completion of the public realm improvements.

This data has been compared to data collected in 2014 before the public realm improvements were implemented. This 'baseline' data has been compared to the most recent data in order to produce a 'before and after' comparison to assess the impact of the public realm on the prosperity of the businesses and the creation of employment.

The results of the residents and visitors research are described in a separate report.

## 2. Aims and objectives

The principal objectives of the research with businesses were to;

- Measure the current levels of employment at the business and any future change
- Determine the financial situation of the business and their growth prospects
- Discover how potential future growth might impact staff levels
- Explore the difference in results between the pre-improvement (2014) and post-improvement (2018) surveys
- Determine the extent to which any change can be attributed to the public realm improvements.

## 3. Methodology

The research was carried out using a sample survey. Fieldwork was conducted by face-to-face interviews with businesses using a questionnaire designed collaboratively by Qa and Arun DC. This was heavily based on the 2014 survey, with the majority of questions repeated in order to allow comparison between the two surveys (2014 and 2018).

To ensure a broad mix of businesses were interviewed, minimum quotas were set on the location of the business. Interviews were carried out in the general areas where the public realm improvements had taken place.

Businesses that were not primarily retail, catering, or attractions (such as solicitors, banks, healthcare, etc.) were not included in the research as it was felt it would not be relevant to them. There were also a number of vacant units and residential properties that were excluded from the sample. With these and the non-relevant businesses removed, the *interview sample* is the remaining businesses that were approached to be interviewed.

Area	Total units: commercial	Interview sample		Target interviews	Final sample	
		n	%		n	%
Upper London Road	104	80	39%	min 19	28	24%
London Road Precinct				min 19	23	20%
High Street	67	48	23%	min 20	27	23%
The Arcade	17	14	7%	min 5	11	9%
Station Road	28	24	12%	min 8	11	9%
York Road	7	5	2%	min 1	1	1%
Queensway	25	23	11%	min 7	8	7%
Lennox Street	6	5	2%	min 2	3	3%
Bedford Street	8	7	3%	min 3	5	4%
<b>Total</b>	<b>262</b>	<b>206</b>	<b>100%</b>	<b>104</b>	<b>117</b>	<b>100%</b>

Interviewing was carried out between 18<sup>th</sup> September and 4<sup>th</sup> October 2018, and interviewers were instructed to seek out the most senior person possible at each business to complete the survey. In total, 117 businesses completed the survey. Following the return of the completed surveys to Qa, they were quality checked for accuracy and manually inputted into an electronic database. The results were then collated and analysed ahead of production of the report.

Based on the population of relevant businesses within Bognor Regis (206) and the final sample of 117, the results in this report at an overall level are accurate to within +/- 6.0% at 95% confidence. This falls just outside the statically representative benchmark of +/- 5%.

#### **External factors affecting longitudinal comparisons**

Throughout this report, findings from this survey (2018) are compared with the baseline survey (2014). When interpreting these comparisons, it is important to consider the difference in time between these two surveys, the difference in the business sample, and the impact that external variables could have on the data.

A key change has been the move away from shopping in person towards internet shopping which is particularly true for non-food items. Data shows that in 2014 16% of non-food spend was on the internet, and in 2017 that has risen sharply to 25% of spend<sup>1</sup>. This drop in non-food spend is reflected in the data collected in 2018 which shows a fall in spend on both household goods and clothing sales.

National trends also point to a negative trading environment for retail businesses over the last four years, illustrated by the disappearance or major store closures from such household names as Poundland, Mothercare, ToysRUs, Marks and Spencer, New Look, House of Fraser, Thomas Cook, Prezzo, Eat and many others in 2018 alone. Whilst rising overheads costs (such as wages, rents, business rates, energy, and others) is a major part of this, the rise of internet shopping and the impact of decreasing consumer confidence is also crucial and further illustrates the change in consumer habits. Deloitte highlight that “years of rising costs, technological disruption and changing consumer behaviour has led to a tipping point that has forced the UK high street to undergo considerable structural change”<sup>2</sup>.

<sup>1</sup> Financial Times; Online retails sales continue to soar. <https://www.ft.com/content/a8f5c780-f46d-11e7-a4c9-bbdefa4f210b> (11 Jan 2018)

<sup>2</sup> Deloitte; Retail Trends 2018

National policy around town centres and high streets such as the Grimsey Review<sup>3</sup> and the work by Mary Portas all point to the need for town centres to diversify away from retail and into service sectors that people have to visit, such as gyms, food and drink, hair and beauty, dentists etc. It would appear that Bognor Regis has already started this process.

There has been considerable economic, political, and social change in the UK (and indeed globally) since 2014, and these can all have an impact on results. The Brexit referendum in 2016 has had a significant impact nationally and locally on business confidence and the willingness to invest due to the future uncertainty that currently exists. This lack of confidence in the future is reflected in the data collected in this survey. The Brexit referendum and subsequent uncertainty continue to have an impact at the time of writing. In addition, the continued long term stagnation in wages (indeed, decline in real wages when inflation adjusted) and the squeezing of disposable incomes have reduced consumer confidence and spending growth<sup>4</sup>.

It is against this backdrop that the findings of this research should be considered, especially when comparing the results from 2014 to those from 2018.

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<sup>3</sup> See <http://www.vanishinghighstreet.com/the-grimsey-review/>

<sup>4</sup> KPMG/Ipsos Mori Retail Think Tank; Retail Think Tank predicts worst run of retail health for five years (2017)

## 4. Key findings

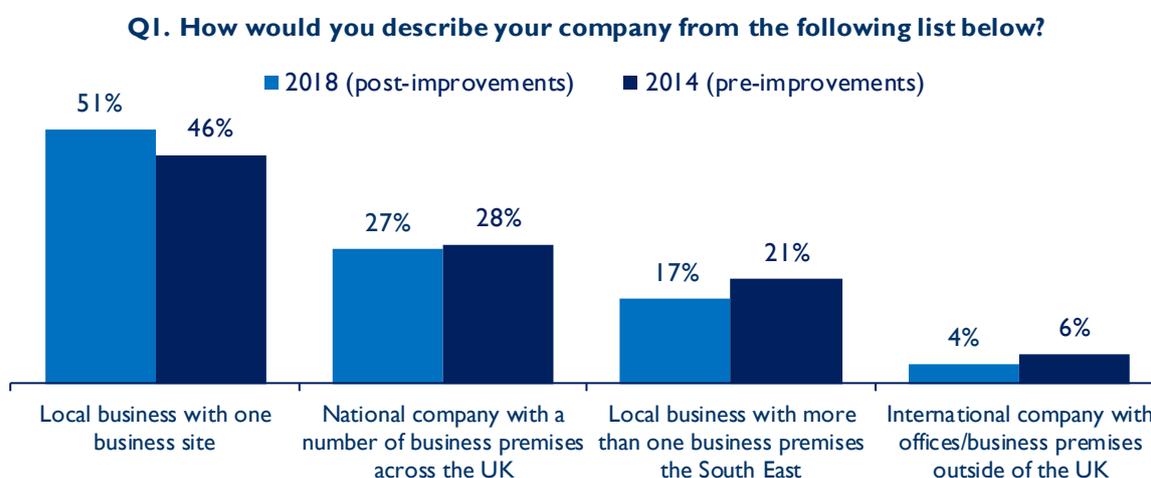
This section details the key findings of the research.

The results are shown using a combination of charts and tables with commentary to describe the findings. In some instances responses to questions have been combined ('Netted') to aid interpretation. This has been highlighted where it occurs. Similarly, on some occasions responses have been converted into average (mean) scores.

Where percentages have been expressed as a 'NET' figure this may sometimes differ from the sum of the percentages due to rounding.

### 4.1 Profile of businesses in sample

Respondents were first asked how they would describe their business; as either a local, national, or international enterprise. Answers were chosen from a pre-coded list shown to respondents, a 'showcard', and results are shown below;



Source: Qa Research 2018 Base: 2014: 105, 2018: 117 (all respondents)

The profile of businesses in the sample in terms of local, national, or international enterprises was fairly similar in 2018 to the profile interviewed in 2014. The only noteworthy difference was the slightly greater proportion of *local businesses with one business site* interviewed in 2018 (51% vs. 46% in 2014). The similarity of the sample in this regard increases the comparability of the data between the baseline and follow-up survey.

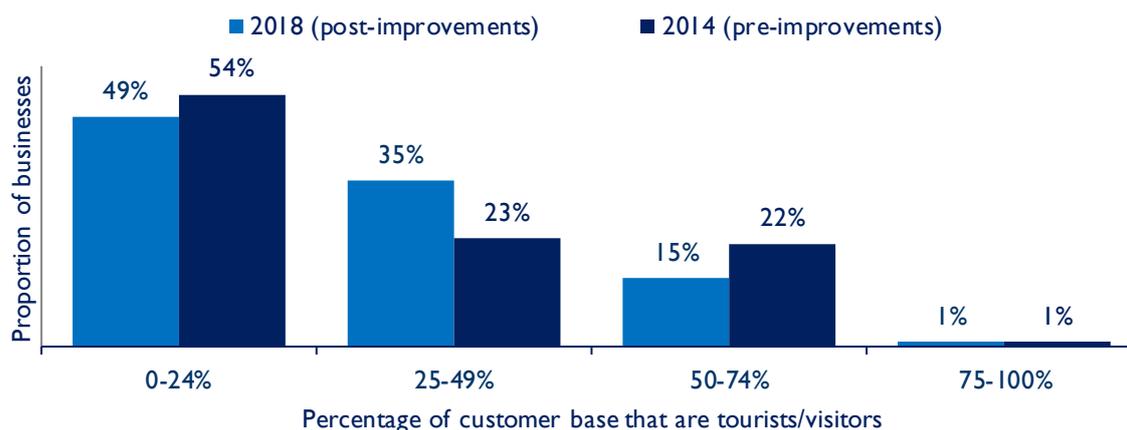
As in 2014, businesses in the 2018 sample were predominantly local, with just under seven-in-ten (68%) describing themselves as either *local businesses with one business site* (51%) or a *local business with more than one business premises in the South East* (32%). In contrast, larger *national chains* made up around one-in-four of the interviewed businesses (27%) but *international chains* continued to represent only a small proportion of the sample (4%); total, national or international businesses made up one third (32%) of the sample.

At relevant points in this report the results are stratified by *local businesses* (NET: *local businesses with one business site* and *local business with more than one business premises in the South East*) and *national/international businesses* (NET: *national company with a number of business premises across the UK* and '*international company with offices/business premises outside of the UK* in order to examine any differences (or lack of differences) in their responses.

Businesses were then asked what percentage of their customer base they estimated were visitors to the area and what percentage were local residents. Respondents were asked to give two percentages that added to 100%, and results are shown below.

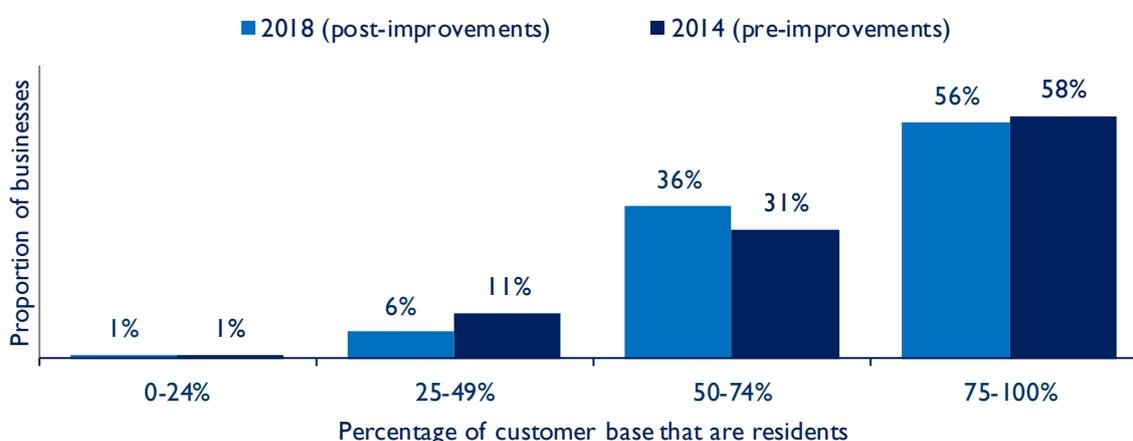
The percentages have been grouped into brackets, and the charts show the proportion of businesses that gave a percentage in each bracket. For example, 49% of business interviewed in 2018 said that between 0 and 24% of their customer base were tourists or visitors.

### Q3a. What percentage of your customer base do you estimate are tourists/visitors to the area?



Source: Qa Research 2018 Base: 2014: 104, 2018: 110 (answers of 'don't know' excluded)

### Q3b. What percentage of your customer base do you estimate are residents of Bognor Regis?



Source: Qa Research 2018 Base: 2014: 104, 2018: 110 (answers of 'don't know' excluded)

Residents of Bognor Regis continue to make up the majority of the customer base for the majority of the interviewed businesses. Almost nine-in-ten (87%) businesses estimated local residents made up 50% or more of their customers. Although the proportion saying they made up 50-74% of customers appeared to have increased (36% vs. 31% in 2014) this was not a statistically significant difference. The overall proportion of customers remains essentially unchanged from the 2014 survey. Indeed, whilst at the outset it would appear that the proportion of the customer base who were residents has increased slightly this was not the case as none of this variance was statistically significant.

Tourists and visitors continue to make up a lower proportion of businesses' customer base, however once again despite some indication of movement in this proportion any variance was not statistically significant. Notably, the increase in the proportion of businesses giving a response of 25-49% appears to have increased but this was not statistically significant.

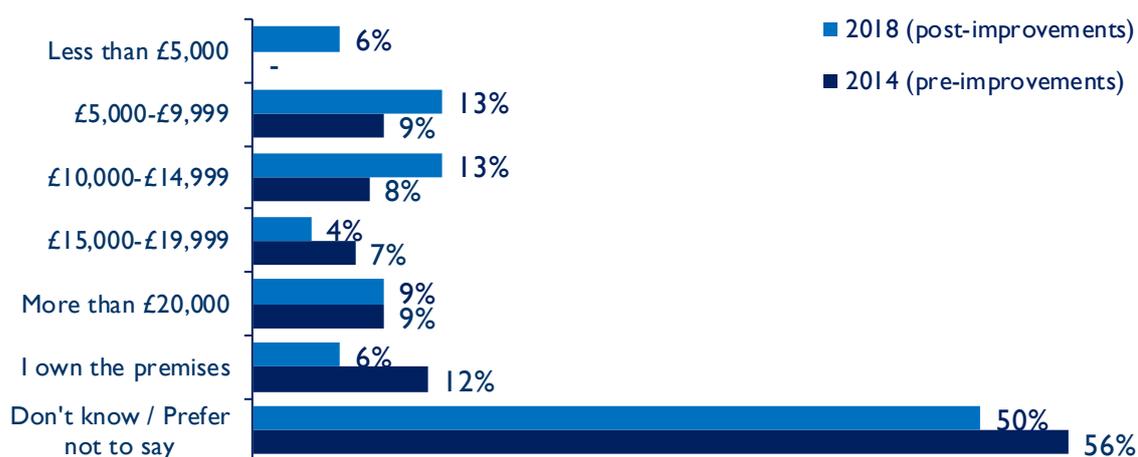
Overall, these results appear to suggest that the balance of residents and tourists/visitors in businesses' customer bases remains largely the same as it was in 2014. This is reinforced by looking at the mean average percentages given; in 2014, an average of 27% of customer base was tourists/visitors and 73% residents, and in 2018 these averages were very similar with 25% being tourists/visitors and 75% residents.

Naturally this question relies on businesses' accurate perception of which customers are tourists and which are residents, but the very low proportion saying 'don't know' in 2018 suggests that businesses were confident they could give an accurate estimate.

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Businesses were also asked what the rental value of their premises was per annum. The majority of respondents either declined to answer or said that they did not know, and results are shown in the chart below.

### Q9. What is the rental value of your premises per annum?



Source: Qa Research 2018 Base: 2018: 117, 2014: 104 (all respondents)

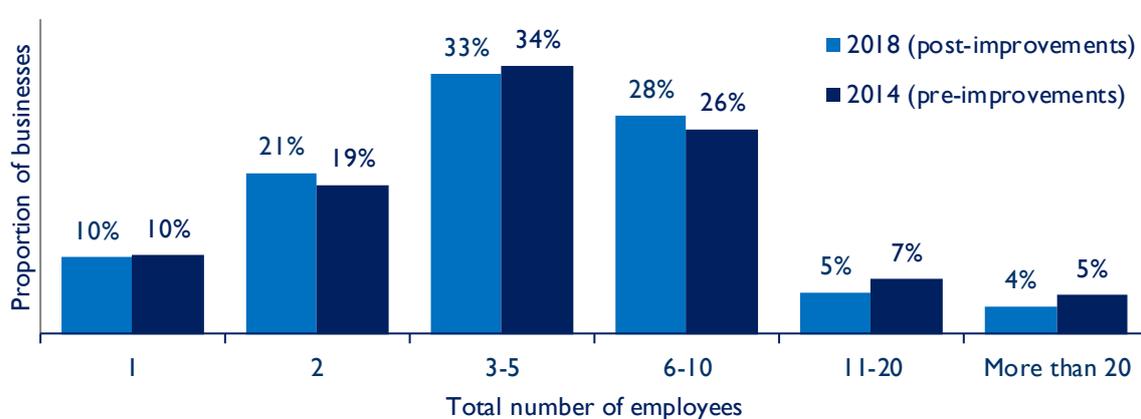
In comparison to the 2014 sample, a greater proportion of businesses were renting at the mid to lower end of the scale (£14,999 and below), and fewer owned their own premises.

## 4.2 Employment at the business

Businesses were then asked a series of questions about the number of employees they had, the breakdown of those by full and part time employees, and the future employment prospects for the business.

Firstly, businesses were asked how many individuals in total (including themselves) they currently employed at the premises where the interview took place. The total number of individuals has been grouped into categories, and the chart below shows the proportion of businesses that fell into each category. For example, 33% of businesses had between 3 and 5 employees in total in 2018.

### Q4a. Including yourself, how many individuals does the business currently employ at this premises?



Mean average number of employees:  
**2018: 5.95 2014: 6.87**

Source: Qa Research 2018 Base: 2014: 105, 2018: 112 (answers of 'don't know' excluded)

At first glance it would appear that there has been a decrease in the mean average number of employees per business since 2014, however in fact there is no statistically significant difference between the two mean average figures. This means that the difference between the two mean averages may just be a consequence of random variation that would be expected within the data. Whilst the mean average may nonetheless be indicative of a decline in employment, there was also no significant differences between the number of employees size bands that businesses fell into; essentially these were the same in 2018 as they were in 2014.

Ultimately the data at this question is inconclusive; the mean average does give some indication that there was been a decline in employment *in this sample* of around one employee per business, but this is not certain and falls within the margin of error.

The table below splits out the 2014 (pre-improvements) and 2018 (post-improvements) mean averages by street; streets for which at least one of the surveys has a minimum base of 10 are shown, so *York Road*, *Lennox Street*, and *Bedford Street* have been excluded.

Note that the base sizes in the table below are very small and the data should be treated with caution – it is only shown to illustrate the differences between the two samples and should not be generalised to the wider business population of any street.

Mean average number of employees by street				
	2014 (pre-improvements)		2018 (post-improvements)	
	Base	Mean	Base	Mean
London Road - precinct	24	7.44	28	7.12
London Road - Upper	21	4.52	23	4.95
High Street	26	10.27	27	6.08
The Arcade	7	4.00	11	3.64
Station Road	8	7.13	11	6.64
Queensway	12	5.67	8	9.63
<b>TOTAL</b>	<b>105</b>	<b>6.87</b>	<b>112</b>	<b>5.95</b>

Only *High Street* and *Queensway* shown noteworthy variation, with the mean average number of employees amongst business from *High Street* (who took part in the survey) falling from 10.27 in 2014 to 6.08 in 2018. This was *not* a statistically significant difference however, and indeed variance may be driven by the inclusion of different specific businesses in the sample.

The 2014 sample for *High Street* contained three business with more than 20 employees, whilst the 2018 sample contained only two – this was likely a contributing factor to the difference in the mean averages.

The mean average number of employees in *Queensway* rose, from 5.67 to 9.63, however the base sizes here are very small and considerable caution should be given to these figures – they would be heavily influence by a single outlier. There was also an increase seen for London Road – Upper and both this and the increase in *Queensway* bucks national trends showing that town centre peripheries are experiencing a decline.

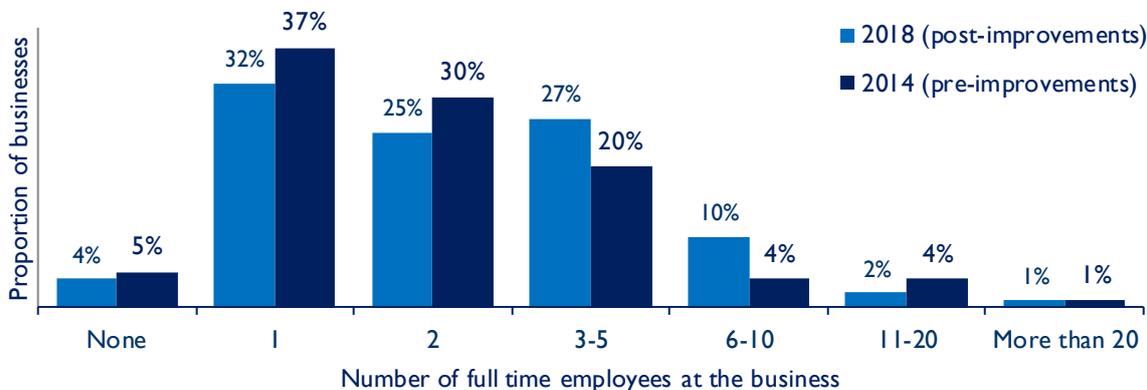
The results can also be looked at by type of business, specifically between local and national/international businesses (as defined by Q1).

Mean average number of employees by type of business				
	2014 (pre-improvements)		2018 (post-improvements)	
	Base	Mean	Base	Mean
Local Business	70	4.86	79	5.26
National / International Business	24	10.89	37	7.46
<b>TOTAL</b>	<b>105</b>	<b>6.87</b>	<b>112</b>	<b>5.95</b>

When split by type of business, the mean figures suggest that there has been little change in the mean average number of employees for local businesses since the 2014 survey. Whilst there has been a greater shift seen for national/international businesses this decrease was not statistically significant. Once again the data appears to be inconclusive as to how overall employment has changed in Bognor Regis since 2014, however the change does tally with the national trend for local independent businesses to be more resilient to the overall decline of the retail sector than the larger chains.

Respondents were then asked how many of their employees work full time (FT, defined as 30 or more hours a week) or part time (PT, less than 30 hours a week). This was recorded as a number and the results have been grouped into categories in the charts below. For example, 32% of businesses interviewed in 2018 had only one full time employee.

**Q4b. And of those, how many are Full time (30+ hours a week)?**

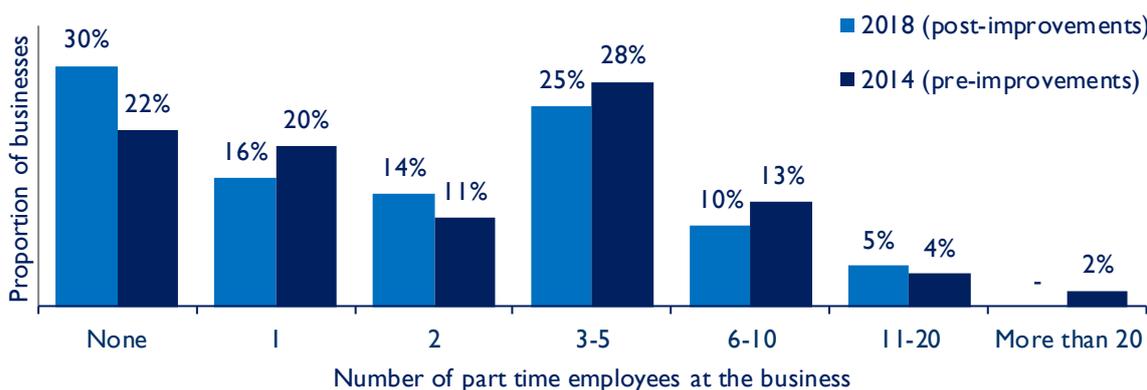


**Mean average number of employees:  
2018: 2.98 2014: 3.02**

Source: Qa Research 2018 Base: 2014: 105, 2018: 112 (answers of 'don't know' excluded)

The data suggests that the average number of full time employees has stayed the same since the 2014 survey. There was no statistically significant difference between the mean average figures, and indeed by the FT employees size bands the only significant difference was a greater proportion of businesses reporting that they had '6-10' FT employees in 2018 (10%, vs. 4% in 2014).

**Q4b. And how many are Part time (less than 30 hours a week)?**



**Mean average number of employees:  
2018: 2.99 2014: 3.85**

Source: Qa Research 2018 Base: 2014: 105, 2018: 111 (answers of 'don't know' excluded)

Greater variation was seen for the mean average number of part time employees, and the mean has declined by almost one PT employee per business. Once again, however, this fell within the margin of error and there was no statistically significant difference between the mean averages.

However, the proportion businesses that employed 'no' part time employees did see a significant increase from the 2014 data, and thus slightly more now appear to employ no part time staff. This adds weight to the suggestion that the decline in the mean average number of PT employees is indicative of an actual trend. Unfortunately the data is once again inconclusive, however, and does not suggest with absolute certainty that there has been a decline in part time employment.

The tables below split out the 2014 (pre-improvements) and 2018 (post-improvements) mean averages of both full time and part time employees by street. Once again, note that the base sizes in the table below are very small and the data should be treated with caution and not be generalised to the wider business population of any street.

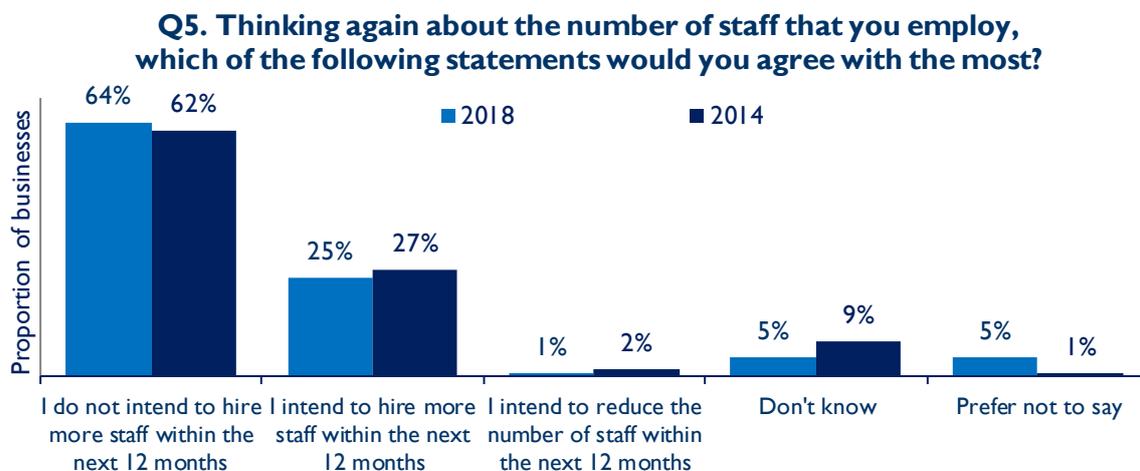
	Mean average number of FT employees by street			
	2014 (pre-improvements)		2018 (post-improvements)	
	Base	Mean	Base	Mean
London Road - precinct	25	2.24	28	2.92
London Road - Upper	21	2.62	23	2.50
High Street	26	5.54	27	3.92
The Arcade	7	1.57	11	1.73
Station Road	8	1.75	11	3.09
Queensway	12	2.00	8	3.38
<b>TOTAL</b>	<b>105</b>	<b>3.02</b>	<b>112</b>	<b>2.98</b>

The mean average number of full time employees by street has not changed considerably since the 2014 survey, with the only noteworthy differences being a slight decline for *High Street* (from 5.54 to 3.92) and increases in the mean number of full time employees for *Station Road* (from 1.75 to 3.09) and *Queensway* (from 2.00 to 3.38). Once again, none of these differences were statistically significant however, and overall the data suggests that the number of FT employees has not changed significantly since the 2014 survey.

Data for part time employees shown in the table below is similarly opaque as there were no statistically significant differences between the mean averages and yet variation was present. Following the trend seen for employees overall and FT employees, the mean number of PT employees in *High Street* has fallen since 2014 (from 4.73 to 2.24). Also following an observed trend, the mean average in *Queensway* has increased (from 3.67 to 6.25); this finding is arguably encouraging as *Queensway* is peripheral to the core town centre and thus more likely to suffer decline. A likely factor in this increase is that in 2014 *Queensway* was 25% vacant and is now fully occupied. Businesses in *Station Road* saw an increase in the mean average number of FT employees, the opposite was true of PT employees and this saw a decrease (from 5.35 to 3.55)

	Mean average number of PT employees by street			
	2014 (pre-improvements)		2018 (post-improvements)	
	Base	Mean	Base	Mean
London Road - precinct	25	5.20	28	4.20
London Road - Upper	21	1.90	23	2.45
High Street	26	4.73	27	2.24
The Arcade	7	2.43	11	1.91
Station Road	8	5.38	11	3.55
Queensway	12	3.67	8	6.25
<b>TOTAL</b>	<b>105</b>	<b>3.85</b>	<b>112</b>	<b>2.99</b>

Businesses were then asked which of three statements about the prospect of hiring more staff in the next 12 months they agreed with the most, and results are shown in the chart below;



Source: Qa Research 2018 Base: 2014: 105, 2018: 117 (all respondents)

Intentions towards staff employment over the next twelve months were essentially the same post-improvements as they were pre-improvements, with no statistically significant change and indeed hardly any variation at all.

The majority of interviewed businesses (64%) continue to indicate that they 'did not intend to hire more staff within the next 12 months'. One-in-six (25%) traders said they did 'intend to hire more staff within the next 12 months', and only a negligible proportion (1%) intended to 'reduce' staff numbers.

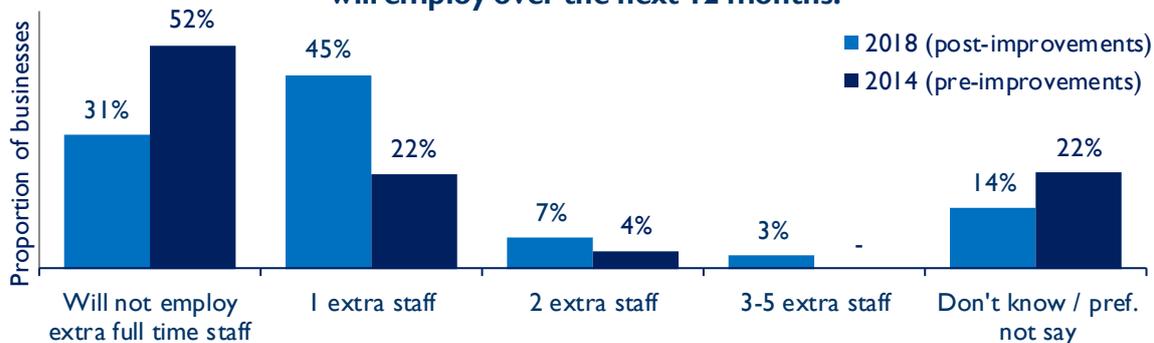
Results are split out by street in the table below. Only streets for which at least one of the surveys has a minimum base of 10 are shown.

	Intention to hire more staff by street					
		2014 (pre-improvements)		2018 (post-improvements)		
	Base	Don't intend to hire more staff	Intend to hire more staff	Base	Don't intend to hire more staff	Intend to hire more staff
London Road - precinct	25	48%	44%	28	39%	32%
London Road - Upper	21	76%	10%	23	74%	17%
High Street	26	62%	27%	27	67%	30%
The Arcade	7	86%	14%	11	73%	27%
Station Road	8	50%	25%	11	73%	18%
Queensway	12	67%	25%	8	50%	38%
<b>TOTAL</b>	<b>105</b>	<b>62%</b>	<b>27%</b>	<b>117</b>	<b>25%</b>	<b>64%</b>

In both 2014 and 2018 intention to hire more staff varied considerably by street. In general there has not been many major movement in the proportion who intended to hire more staff, although the proportion who would do so in *The Arcade* has almost doubled since 2014 (14% to 30%). In 2018 businesses in *Queensway* were the most likely to intend to hire more staff (38%), followed by *London Road – Precinct* (32%) and *High Street* (30%). At the time of the original 2014 survey, both *The Arcade* and *Queensway* had 35% and 25% vacancy rates respectively, and now both areas have full, or close to full occupancy; this could be a factor in the stronger business confidence indicated by these results.

Businesses who indicated that they *'did intend to hire more staff'* were then asked how many extra full and part time staff they anticipated hiring over the next 12 months. The number of extra staff has been grouped into bands, and the charts below show the proportion of businesses that gave a figure in each band. For example, 45% of businesses interviewed in 2018 think they will hire one extra full time staff member over the next 12 months. Note that due to the low base size comparison should be treated with caution.

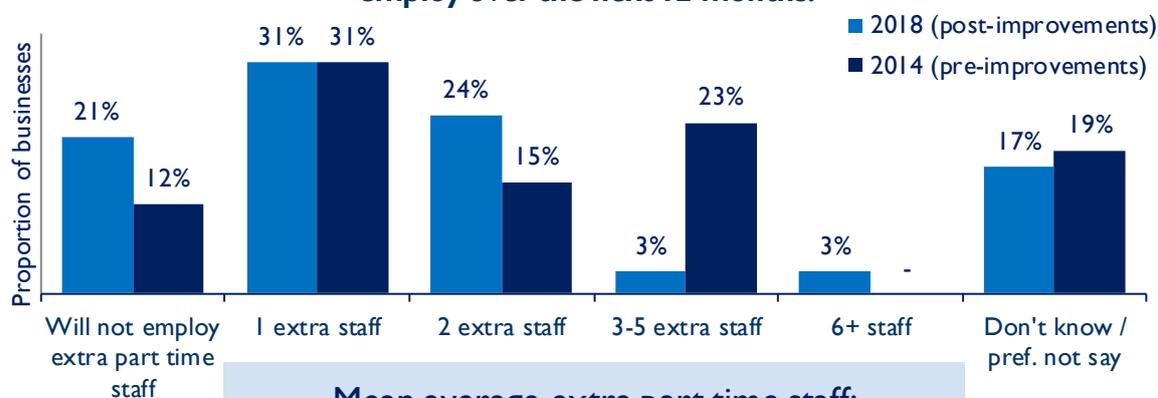
**Q6a. Roughly how many additional full time staff do you think you will employ over the next 12 months?**



Mean average extra full time staff:  
**2018: 0.88 2014: 0.38**

Source: Qa Research 2018 Base: 2018:29, 2014:27 (intending to hire more staff within 12 months)

**Q6b. Roughly how additional part time staff do you think you will employ over the next 12 months?**



Mean average extra part time staff:  
**2018: 1.38 2014: 1.76**

Source: Qa Research 2018 Base: 2018:29, 2014:26 (intending to hire more staff within 12 months)

As stated, due to the small base size comparisons between the two surveys are difficult and indeed there was no statistically significant difference between the mean averages despite the apparent variation. However the proportion of businesses that would employ *'1 extra'* full time member of staff has increased significantly from 22% in 2014 to 45% in 2018, suggesting that there is a desire for more full time staff specifically amongst those intending to hire staff.

In contrast, the only significant difference in intention to hire part time staff appears largely the same as in 2014, although there was been a significant decline in the proportion who would hire between *'3-5 extra'* part time staff from 23% in 2014 to almost none (3%) in 2018.

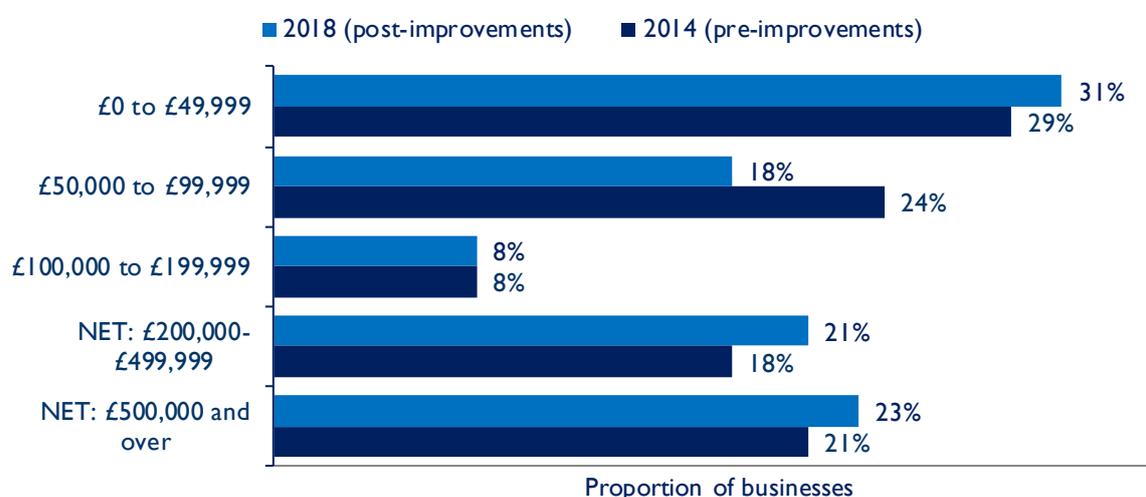
### 4.3 Financial measures of the businesses

Respondents were then asked a series of questions about the finances of their business and how they expected to grow in the near future. These results have been compared to identical questions asked in the 2014 survey.

Businesses were asked what their turnover was at the end of *their* last financial year. Answers were picked as bands shown on a showcard.

Data on the finances of the surveyed businesses is very limited as the majority of business in both the post-improvements (67%) and the pre-improvements survey (64%) either declined to give or did not know their turnover. As a consequence, the base sizes of both years were small.

**Q7c. At the end of your last financial year, which of these bands covers the turnover before tax of this premises, not including any other premises if you have them?**



Source: Qa Research 2018 Base: 2018: 39, 2014: 38 (excludes prefer not to say / don't know)

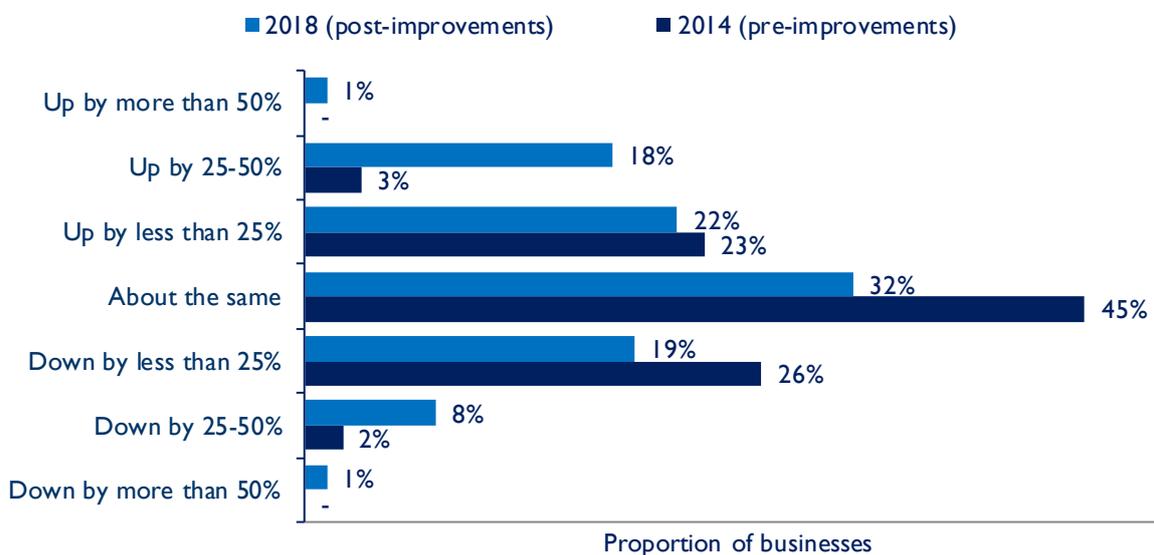
The profile of business (who were willing to disclose their turnover) by turnover is fairly similar post-improvements to that recorded pre-improvement, with no statistically significant differences recorded.

Amongst businesses who made up the sample, there was a slightly higher proportion of both business at the high end and low end of the turnover scale recorded in the 2018 dataset. Looking at the counts (as the percentages at such a small base size can be misleading), there was one more business with a turnover of NET: £500,000, one more with a turnover of NET: £200,000-£499,999, and one more with a turnover of £0-49,999. Corresponding, there were two less in the £50,000-£99,999 band.

Respondents were also asked two questions about the growth of their business, both in the past and their anticipated future growth. The first of these asked whether, in terms of turnover, the business had grown in the previous financial year compared to the financial year before that. Answers were chosen from categories prompted from a showcard and are shown overleaf.

Again in both surveys some businesses preferred not to disclose this information, and a small proportion also reported they 'didn't know' the answer. These have been excluded from the charts below;

**Q7a. Was the turnover in your last financial year larger, smaller or about the same as the financial year before that?**



Source: Qa Research 2018 Base: 2018: 79, 2014: 91 (excludes prefer not to say / don't know)

Amongst businesses who chose to disclose this information, a significantly greater proportion in 2018 (41%, i.e. post-improvements) said that their turnover in their most recent financial year was larger than it was in the year before compared to 2014 (26%, i.e. pre-improvements). This suggests that more businesses were on an upward turnover trend post-improvements than were pre-improvements. In particular, the proportion who said their turnover was up by '25%-50%' was six times higher in 2018 than it was in 2014 (18% vs. 3%).

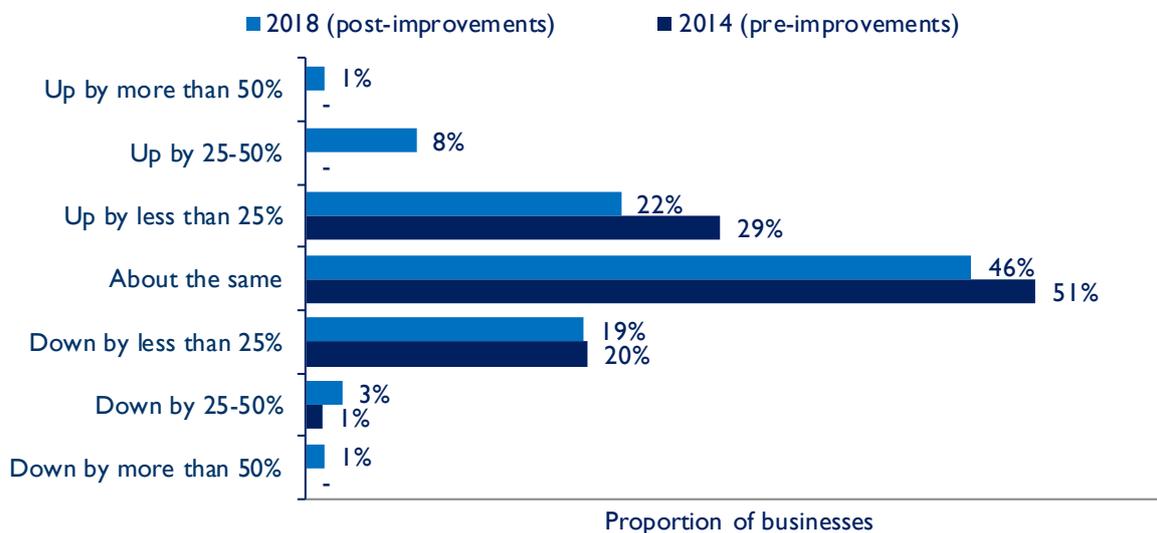
This increase has been driven by a reduction in the proportion who answered that their turnover was 'about the same' as the previous year, however, and the proportion who said that their turnover was smaller than the previous year was essentially the same in 2018 as it was in 2014 (28% vs. 29%).

Results for 2018 are split out by street in the table below. Streets are only shown where the base size is 10 or over, with answers of 'prefer not to say' and 'don't know' excluded. Results were reasonably consistent across the three streets in the table, with around four-in-ten to five-in-ten businesses saying their turnover had increased.

(2018 only)	Was the turnover in your last financial year larger, smaller or about the same as the financial year before that?			
	Base	NET increase	About the same	Net decrease
London Road – precinct	16	50%	25%	25%
London Road - Upper	15	40%	40%	20%
High Street	20	45%	20%	35%
<b>TOTAL</b>	<b>117</b>	<b>22%</b>	<b>68%</b>	<b>8%</b>

Businesses were then asked about their projected growth in turnover in their next financial year, and responses are shown below compared to the findings from 2014.

**Q7b. And compared to your turnover in your last financial year, do you expect your turnover at the end of your next financial year will be larger, smaller, or about the same?**



Source: Qa Research 2018 Base: 2018: 78, 2014: 87 (excludes prefer not to say / don't know)

Future projections of turnover were largely the same as they were in 2014, with around three-in-ten expecting turnover to be larger (31% in 2018 and 29% in 2014) and around two-in-ten expecting it to be smaller (23% in 2018 and 21% in 2014). There were no statistically significant differences between these figures.

Most businesses, around half (46% in 2018 and 51% in 2014), continued to suggest that their turnover would be 'about the same' in the next financial year as it was in the previous year.

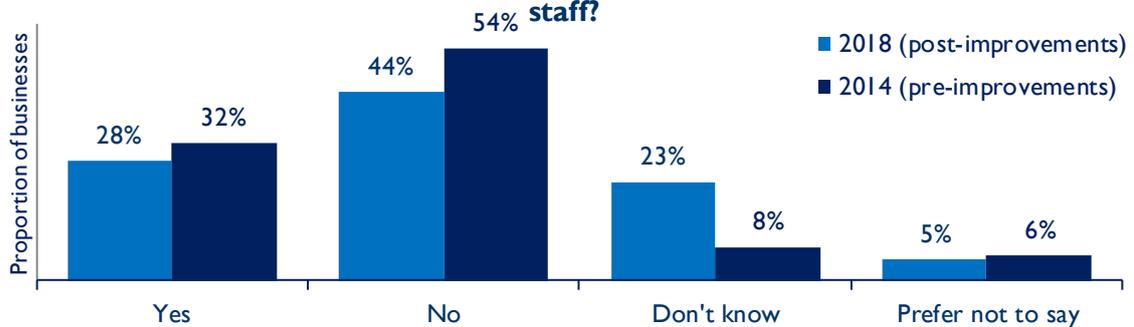
Results for 2018 are split out by street in the table below where the base size is 10 or over, with answers of 'prefer not to say' and 'don't know' excluded. Business in *London Road – Precinct* appeared to have the most optimistic projections with two-fifths (41%) saying turnover would increase and three-fifths saying it would stay about 'about the same' (59%); none thought it would decrease. This would be expected as *London Road precinct* is the core of the retail area.

(2018 only)	And compared to your turnover in your last financial year, do you expect your turnover at the end of your next financial year will be larger, smaller, or about the same?			
	Base	NET increase	About the same	Net decrease
London Road – precinct	17	41%	59%	0%
London Road - Upper	14	14%	57%	29%
High Street	20	35%	35%	30%
<b>TOTAL</b>	<b>117</b>	<b>22%</b>	<b>68%</b>	<b>8%</b>

In contrast, businesses in *London Road – Upper* were more pessimistic; twice as many businesses said they expected turnover to decrease than expected it to increase (29% vs. 14%). Businesses in *High Street* were polarised, with around one third expecting turnover to increase (35%), one third expecting it to decrease (30%), and one third expecting it to remain 'about the same' (35%).

Respondents were then asked about the impact of potential growth on staff levels, even if they did not expect to grow in the future;

**Q8a. Imagine that your turnover next year was larger, even if you do not expect it to be; would that mean you would employ more staff?**



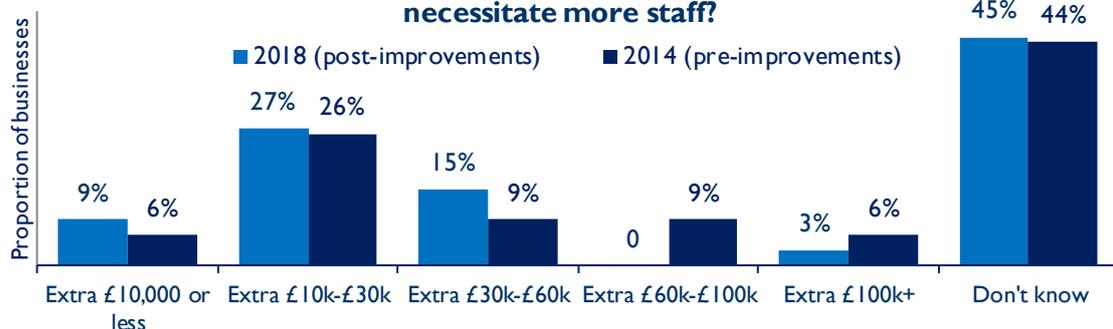
Source: Qa Research 2018 Base: 2014: 105, 2018: 117 (all respondents)

Businesses appeared to be more uncertain about their ability to employ staff should they experience a growth in turnover in 2018 than they were in 2014, with almost one-in-four (23%) answering that they 'don't know' compared to less than one-in-ten (8%) at the pre-improvements survey.

Despite this, the proportion that said they would employ more staff if their turnover were to increase (i.e. answered 'yes') did not decrease and instead has stayed essentially the same since the 2014 survey (28% in 2018 and 32% in 2014, no statistically significant difference). Thus whilst there was no greater expectation to hire more staff, the greater uncertainty evident in the 2018 results has not meant that this has declined. The proportion who said that they would not hire more staff if turnover were to increase (i.e. answered 'no') did see a statistically significant decrease between the two surveys however, suggesting that where some businesses had once said 'no' to hiring more staff they were now uncertain instead.

Those businesses that said they would hire more staff if their turnover increased were asked to quantify this by saying how much additional turnover would be required to necessitate more staff. Answers were selected from bands shown on a showcard, and are shown below;

**Q8b. In whole pounds, what extra level of turnover would necessitate more staff?**



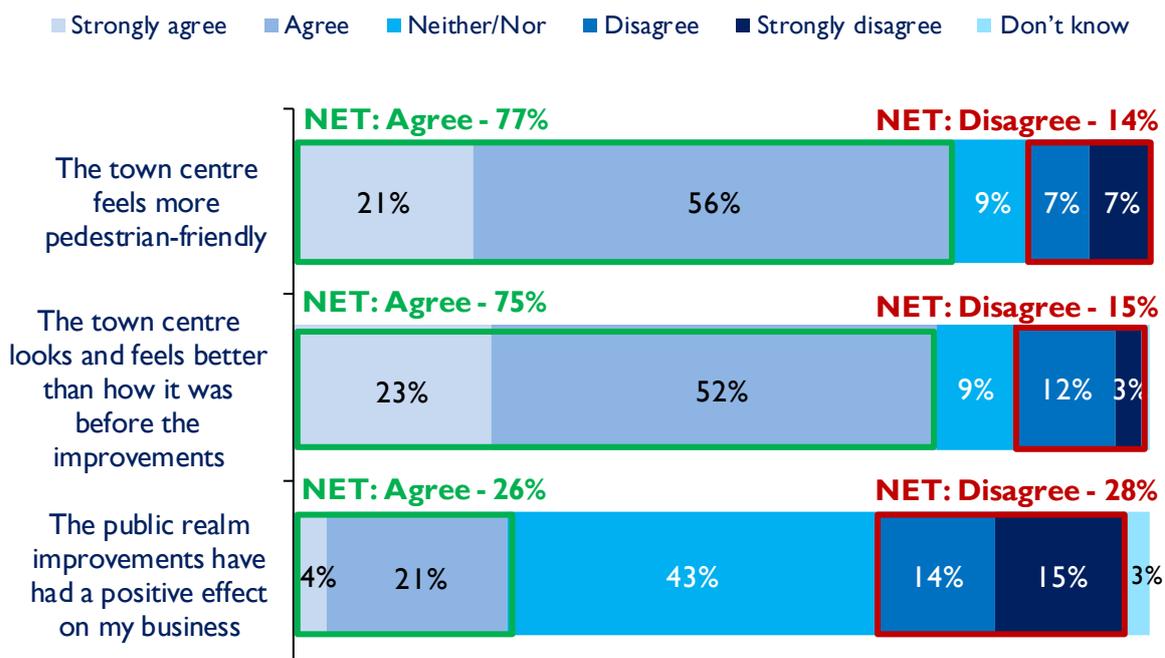
Source: Qa Research 2018 Base: 2014: 34, 2018: 33 (would employ more staff if turnover larger next year)

There has been little change from the 2014 results, with no statistically significant differences between figures and the majority of respondents still struggling to quantify how much more turnover would be required to hire more staff (i.e. answering 'don't know').

## 4.4 Perceptions of the public realm improvements

In order to gauge businesses' perception of the new public realm improvements, a series of new questions were asked – these were not included in the 2014 survey and thus no comparative data is available. Businesses were asked how far they agreed with three statements relating to the public realm improvements, with answers were recorded on a one to five scale (five being 'strongly agree'). Results are shown in the chart below;

### Q3c. Thinking about the public realm improvements, how far do you agree with the following statements...



Source: Qa Research 2018 Base: 2018: 117 (all respondents)

The majority of businesses clearly felt that the public realm improvements had been an improvement on the aesthetic and accessibility of the town centre. Three quarters agreed that the town centre 'felt more pedestrian friendly' (77%) and that it 'looked and felt better than how it was before the improvements' (75%). Whilst this agreement was not unanimous, it was nonetheless true that a far greater proportion agreed than disagreed; indeed, the proportion of businesses that specifically 'strongly agreed' was greater than the entire proportion who disagreed in both cases.

Whilst businesses did perceive that the public realm improvements had improved the look and feel of the town centre, opinions were polarised as to whether they had had a positive impact on trade. An essentially equal proportion agreed (26%) and disagreed (28%) that the improvements had had a 'positive effect on their business', and indeed just under half (43%) said that they 'neither agreed nor disagreed' with this statement.

The uncertainty over whether improvements have had a positive impact on business is seen throughout other measures on the survey, such as the suggestion that there has been no change in the overall level of employment, that many businesses are still unsure of future turnover, and that many do not intend to hire more staff in the near future. It should be stressed that while the data does not demonstrate a positive impact on business employment and turnover, it also does not mean the improvements have had a negative impact and indeed there is no suggestion in the data that that is the case. The data does however show that the town's businesses are 'holding their own' against a national backdrop of sharp retail decline.

Results of this question are split out by street in the tables below. Streets with a base size of less than 10 are not shown.

	Base	The town centre feels more pedestrian-friendly		The town centre looks and feels better than how it was before the improvements	
		NET Agree	NET Disagree	NET Agree	NET Disagree
London Road – precinct	28	79%	14%	79%	11%
London Road - Upper	23	96%	4%	83%	13%
High Street	27	59%	22%	74%	15%
The Arcade	11	64%	27%	73%	27%
Station Road	11	91%	0%	73%	18%
<b>TOTAL</b>	<b>117</b>	<b>77%</b>	<b>14%</b>	<b>75%</b>	<b>15%</b>

Agreement that the town centre felt ‘more pedestrian-friendly’ was especially high in *London Road – Upper* (96%) and *Station Road* (91%), notably more so than in other streets. This is likely because the public realm improvements in *Station Road* and parts of *Upper London Road* included widened pavements, traffic calming on the roadways to slow traffic and crossing points for pedestrians narrowed to make crossing easier. Agreement with this statement was lowest in *High Street* (59%), however there has been no change to traffic flows here under the public realm works. There was a considerable range of response which suggests that agreement that the town centre is more pedestrian-friendly was not unanimous across the town.

Agreement that the town centre ‘looked and felt better than how it was before the improvements’ was consistent, and although this was slightly greater in *London Road – precinct* (79%) and *London Road – Upper* (83%), overall the spread of response was low with a minimum of around three quarters agreeing with this.

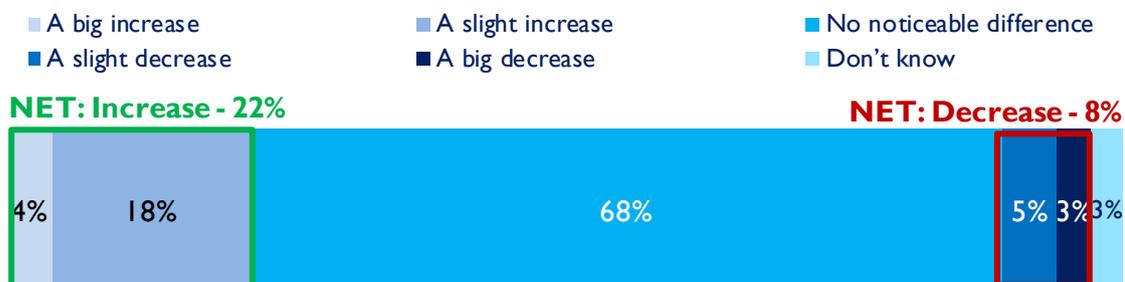
Agreement that the ‘public realm improvements had a positive effect on the business’ was more polarising and there were contrasting opinions between individual streets, as shown in the table below.

	Base	The public realm improvements have had a positive effect on my business		
		NET Agree	Neither/nor	NET Disagree
London Road – precinct	28	39%	57%	4%
London Road - Upper	23	26%	39%	26%
High Street	27	19%	48%	30%
The Arcade	11	36%	36%	18%
Station Road	11	9%	36%	55%
<b>TOTAL</b>	<b>117</b>	<b>26%</b>	<b>43%</b>	<b>28%</b>

Agreement was highest in *London Road – Precinct* (39%) and *The Arcade* (36%), but in contrast was much lower in *High Street* (19%) and especially *Station Road* (9%). Disagreement was corresponding higher in these latter two streets, particularly in *Station Road* where over half (55%) said that they disagreed. The *Station Road* result is unexpected as this area has been substantially renovated, however it may be a result of the increase in range and perceived quality of the food and drink offer elsewhere in the town that has drawn custom away from *Station Road* where there is a concentration of take-away food outlets.

Respondents were also asked if they felt the new public realm improvements had caused an increase, decrease, or made no noticeable difference to footfall in their part of town. Again, this question was only asked in 2018 and therefore no comparator data is available. Results are shown in the chart below.

### Q3d. In your opinion, what effect have the new public realm improvements had on the footfall in your part of the town?



Source: Qa Research 2018 Base: 2018: 117 (all respondents)

The majority of businesses (68%) felt the new public realm had made 'no noticeable difference' to footfall in their part of Bognor Regis, and indeed only around one-in-five (22%) suggested that they had noticed an increase.

The table below shows the results split out by street. Streets with a base size of less than 10 are not shown.

What effect have the new public realm improvements had on the footfall in your part of the town?				
	Base	NET Increase	No noticeable difference	NET Decrease
London Road – precinct	28	25%	64%	4%
London Road - Upper	23	17%	74%	4%
High Street	27	11%	81%	7%
The Arcade	11	73%	9%	18%
Station Road	11	18%	82%	0%
<b>TOTAL</b>	<b>117</b>	<b>22%</b>	<b>68%</b>	<b>8%</b>

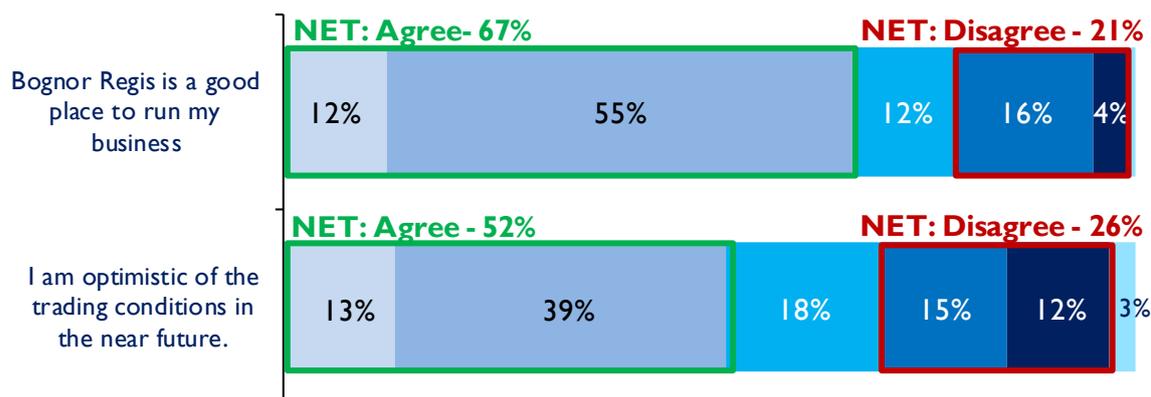
In most streets the majority of businesses felt that the public realm had made 'no noticeable difference' to footfall. The exception were businesses in *The Arcade*, where three quarters (73%) said that there had been an increase in footfall in their part of town. Interestingly, this was also the street in which the highest proportion of respondents said there had been a decrease (18%). This was the street most likely to notice some degree of difference. Conjecturally there has been the suggestion that the difference may be driven by differing views held by the many new businesses moving into the Arcade and the incumbent traders already located there.

## 4.5 Satisfaction with, and optimism about Bognor Regis

Finally, respondents were asked how far they agreed or disagreed with two statements about their optimism for trading conditions and Bognor Regis as a location for business. Answers were recorded on a one to five scale (five being 'strongly agree') and are shown in the chart below; only data from 2018 is shown.

### Q10. Lastly, how far do you agree or disagree with the following statements...

■ Strongly agree ■ Agree ■ Neither agree / disagree ■ Disagree ■ Strongly disagree ■ Don't know



Source: Qa Research 2018 Base: 2018: 117 (all respondents)

Two thirds (67%) of respondents agreed that 'Bognor Regis was a good place to run their business', although the majority of these only 'agreed' (55%) rather than 'strongly agreed' (12%). Whilst this was a majority, there did remain one-in-five (21%) business who disagreed that this was the case.

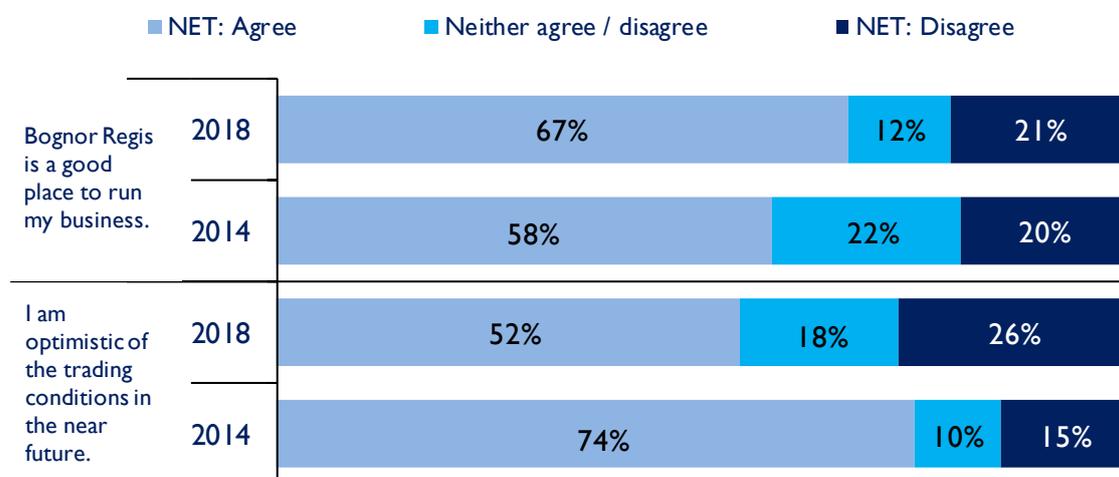
Despite the majority holding this positive outlook, only half (52%) of businesses interviewed agreed that they were 'optimistic of trading conditions in the near future' and indeed one-in-four (26%) disagreed that this was the case. This uncertainty about the future was also seen in other areas of the survey, such as the similar proportion who said they 'didn't know' if their turnover would be larger or smaller in the next financial year (22%). Again, this uncertainty could be influenced by the prevailing retail and national uncertainty.

Responses by subgroups are shown in the table below. Groups where the base size was less than 10 are not shown.

(2018 only)	Base	Bognor Regis a good place to run business Net: Agree	Optimistic of trading conditions in future Net: Agree
<b>Type of business</b>			
Local	80	61%	49%
National/international	37	78%	59%
<b>Location</b>			
London Road - precinct	28	86%	43%
London Road - Upper	23	52%	57%
High Street	27	59%	44%
The Arcade	11	73%	36%
Station Road	11	45%	73%
<b>TOTAL</b>	<b>117</b>	<b>67%</b>	<b>52%</b>

The chart below compares the results of the 2014 and 2018 data for both statements. For clarity, only the NET figures and 'neither agree nor disagree' are shown.

**Q10. Lastly, how far do you agree or disagree with the following statements...**



Source: Qa Research 2018 Base: 2018: 117, 2014: 105 (all respondents)

Agreement that 'Bognor Regis was a good place to run their business' has increased significantly since the 2014 survey, from just under six-in-ten (58%) to just under seven-in-ten (67%). Whilst this is a positive finding, there has been no change in the proportion who disagreed, with still one-in-five (21%) indicating this was the case; instead, the increase in agreement has come from a decline in those giving neutral answers (i.e. 'neither agree nor disagree').

Paradoxically, despite the increase in perception that Bognor Regis is a good place to do business there has been a significant decrease in the proportion who agreed that they were 'optimistic of trading conditions in the near future' which has fallen from around three quarters (74%) pre-improvements to half (52%) post-improvements. The proportion of those who specifically disagreed that they were optimistic has almost doubled since the 2014 survey (15% in 2014 to 26% in 2018). Again these answers could be influenced by national factors.

	% Net agree by street and location			
	2014 (pre-improvements)		2018 (post-improvements)	
Type of business	Good place to run business	Optimistic of trading conditions	Good place to run business	Optimistic of trading conditions
Local	53%	71%	61%	49%
National/international	69%	80%	78%	59%
Location				
London Road - precinct	72%	84%	86%	43%
London Road - Upper	43%	57%	52%	57%
High Street	54%	77%	59%	44%
The Arcade	57%	29%	73%	36%
Station Road	50%	75%	45%	73%
Queensway	75%	92%	88%	88%
<b>TOTAL</b>			<b>67%</b>	<b>52%</b>

## 5. Conclusions

**The data is ultimately inconclusive as to whether there has been an increase in employment and turnover amongst businesses in Bognor Regis between 2014 and 2018.** Indeed, the data suggests that it is more likely that employment has stayed the same or declined slightly. Whilst the mean average number of employees per business has decreased since the baseline survey in 2014, both overall and for part time employee, the decline recorded was not statistically significant and thus cannot be said to conclusively represent a real world trend. Amongst business who reported their turnover, a higher proportion in 2018 than in 2014 report that their previous year's turnover was greater than that recorded in the year before; however, projections for future turnover were less optimistic and largely the same as they were in 2014. Only a minority of businesses planned to hire more staff within the next 12 months, although the situation was the same in 2014. The increased national economic uncertainty generated by Brexit<sup>5,6</sup> and the difficult retail trading environment will have generated greater uncertainty and negativity in 2018<sup>7,8</sup>.

**Businesses generally perceive that the public realm improvements have created a more visually appealing and pedestrian-friendly town centre.** The majority of businesses in the sample agreed that this was the case and only a small proportion, around one-in-seven, disagreed. Businesses in London Road were especially likely to feel that the town centre was more pedestrian friendly, as were those in Station Road, however the proportion of businesses in High Street that perceived this was low in comparison. Agreement that the town centre looked and felt better than it did before the improvements was more unanimous and businesses across the town agreed that this had been an improvement.

**Despite the positive perception of the aesthetics of the public realm improvements, however, businesses were polarised as to whether they actually had a positive impact on their business.** When asked, the majority of businesses said they neither agreed nor disagreed that the improvements had a positive effect on their business, and amongst the remainder an essentially equal proportion agreed and disagreed. There was some evidence to suggest that the businesses in London Road precinct and The Arcade were more likely to report a positive impact, and in contrast those in High Street and Station Road were the least likely. In addition, the majority of business felt that the new public realm had made no noticeable difference to footfall in their part of town – only in The Arcade did a majority suggest there had been an increase in footfall. Whilst Bognor Regis was perceived to be a good place to do business more so than in 2014, traders have also become less optimistic about trading conditions in the future.

**Although the public realm improvements appear to have been well received by businesses in the town, the data cannot conclusive say that the improvements have at this stage directly improved objective measures of business performance in Bognor Regis.** It is important to stress, however, that this does not mean that the improvements have not had a material impact, just that at no such impact is manifested in this data. Attributing observed change to specific factors is very difficult, especially with the small sample size of this survey and the long interval between the pre- and post- improvements stages. There are a huge number of variables beyond the scope of this research that can impact business performance metrics and even subjective business optimism, such as the upcoming exit from the EU, economic malaise, tourism trends, and many other factors.

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<sup>5</sup> KPMG; Moderate, occasionally rough, viability poor - UK Economic Outlook (Sept 2018)

<sup>6</sup> International Monetary Fund; United Kingdom: Staff Concluding Statement of the 2017 Article IV Mission (Dec 2017)

<sup>7</sup> Deloitte; Retail Trends 2018

<sup>8</sup> KPMG/Ipsos Mori Retail Think Tank; Retail Think Tank predicts worst run of retail health for five years (2017)

## 6. Appendix

### 6.1 Questionnaire.

#### Bognor Regis Business Survey 2018

<b>Interviewer</b>	<b>Date of Interview DD/MM/YY</b>	
	DD	MM YY
<b>Time (Duration)</b>	<b>QAID</b>	<b>Survey Number</b>
<b>Inputted (internal use)</b>	<b>Q-C (internal use)</b>	

#### Introduction:

**Good morning/ afternoon I am working for Qa research on behalf of Arun District Council. The Council have asked us to undertake some research with the owners and managers of businesses in Bognor Regis.**

**Are you a manager/ owner of this business?**

**Yes – Continue**

**No – Attempt to arrange an appointment with owner/ manager**

**Following improvements to the public realm in Bognor Regis – that’s the paving, street furniture, planting, lighting etc, the Council want to evaluate the impact this has had on businesses in Bognor Regis. This survey will help them do this, and as part of that evaluation we are working with the traders trying to collect information about business in the town centre.**

**Would you be able to spare a few minutes to answer some questions with me to help the Council, it should take about six to eight minutes?**

**Before we begin, I’d like to reassure you that this interview will be carried out according to the Market Research Society’s Code of Conduct and all your answers and information you provide will be treated as anonymous and confidential in accordance with the Data Protection Act and the GDPR.**

#### Business background

<b>Q1. How would you describe your company from the following list?</b>	<b>(S)</b>
<b>[SHOWCARD 1]</b>	
Local business with one business site	1 (1)
Local business with more than one business premises the South East	2 (2)
National company with a number of business premises across the UK	3 (3)
International company with offices/ business premises outside of the UK	4 (4)
	5 (5)
Other – please state	
Don't know [Do not prompt]	6 (6)

<b>Q2. Which of the following streets is this premises in?</b>		(S)
<b>[SHOWCARD 2]</b>		
London Road – precinct	1	①
London Road - Upper	2	②
High Street	3	③
The Arcade	4	④
Station Road	5	⑤
York Road	6	⑥
Queensway	7	⑦
Lennox Street	8	⑧
Bedford Street	9	⑨

<b>Q3a. What percentage of your customer base do you estimate are tourists / visitors to the area?</b>		(S)
Q3a AND Q3b MUST ADD TO 100%		
Percentage tourists/ visitors	<input type="text"/>	
Don't know [Do not prompt]	1	①

<b>Q3b. What percentage of your customer base do you estimate are residents of Bognor Regis?</b>		(S)
Q3a AND Q3b MUST ADD TO 100%		
Percentage tourists/ visitors	<input type="text"/>	
Don't know [Do not prompt]	1	①

**Public realm improvements**

**These next two questions about the public realm improvements in the town – so the paving, street furniture, planting, lighting etc, - that have been made over the last few years.**

**Q3c. Thinking about the public realm improvements, on a one to five scale where one is Strongly Disagree and five is Strongly Agree how far do you agree with the following statements...**

[SHOWCARD 3]

	Strongly disagree	Disagree	Neither/ Nor	Agree	Strongly agree	Don't know [Do not prompt]
The town centre looks and feels better than how it was before the improvements	①	②	③	④	⑤	⑥
The town centre feels more pedestrian-friendly	①	②	③	④	⑤	⑥
The public realm improvements have had a positive effect on my business	①	②	③	④	⑤	⑥

**Q3d. In your opinion, what effect have the new public realm improvements had on the footfall in your part of the town? [READ OUT] (S)**

A big increase	1	①
A slight increase	2	②
No noticeable difference	3	③
A slight decrease	4	④
A big decrease	5	⑤
[Do not prompt] Don't know	6	⑥

## Business Employment

**I'm now going to ask you some questions about the number of people you employ at the business. Do remember this information is confidential.**

**If you have more than one premises, please think only about the people you employ at this premises we are in now.**

<p><b>Q4a. Including yourself, how many individuals does the business currently employ at this premises?</b></p> <p>[IF REQUIRED: we are looking for a headcount, so the number of people regardless of how many hours they work]</p>	(S)		
Number of individuals employed			
Don't know [Do not prompt]	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; background-color: #cccccc; text-align: center;">1</td> <td style="width: 50%; text-align: center;">①</td> </tr> </table>	1	①
1	①		

<p><b>Q4b. And of those, how many are full time, so who work more than 30 hours a week, and how many are part time?</b></p> <p>[INTERVIEWER: total must equal number from Q3]</p>	(M)
Full time (30+ hours a week)	
Part time (less than 30 hours a week)	

<p><b>Q5. Thinking again about the number of staff that you employ, which of the following statements would you agree with the most? [SHOWCARD 4]</b></p>	(S)	Go to
I intend to hire more staff within the next 12 months	1	① Continue
I do not intend to hire more staff within the next 12 months	2	② Q7
I intend to reduce the number of staff I have within the next 12 months	3	③ Q7
Don't know [Do not prompt]	4	④ Q7
Prefer not to say [Do not prompt]	5	⑤ Q7

<b>Q6a. Roughly how many <u>full time</u> additional staff do you think you will employ over the next 12 months?</b>		(S)
Additional full time staff		
Don't know [Do not prompt]	1	①
Prefer not to say [Do not prompt]	2	②

<b>Q6b. And roughly how many <u>part time</u> additional staff do you think you will employ over the next 12 months?</b>		(S)
Additional part time staff		
Don't know [Do not prompt]	1	①
Prefer not to say [Do not prompt]	2	②

**Business Finances**

**I'm now going to ask you a few questions about the financial side of the business and your ambitions and projections going forward.**

**Before I do, I'd just like to remind you again that all the information you disclose in this survey is strictly anonymous and confidential.**

<b>Q7a Was the turnover in your last financial year larger, smaller or about the same as the financial year before that? [SHOWCARD 5]</b>		(S)
Up by more than 50%	1	①
Up by 25-50%	2	②
Up by less than 25%	3	③
About the same	4	④
Down by less than 25%	5	⑤
Down by 25-50%	6	⑥
Down by more than 50%	7	⑦
Don't know [Do not prompt]	8	⑧
Prefer not to say [Do not prompt]	9	⑨

<b>Q7b. And compared to your turnover in your last financial year, do you expect your turnover at the end of your next financial year will be larger, smaller, or about the same? [SHOWCARD 5]</b>		(S)
Up by more than 50%	1	①
Up by 25-50%	2	②
Up by less than 25%	3	③
About the same	4	④
Down by less than 25%	5	⑤
Down by 25-50%	6	⑥
Down by more than 50%	7	⑦
Don't know [Do not prompt]	8	⑧
Prefer not to say [Do not prompt]	9	⑨

<b>Q7c. At the end of your last financial year, which of these bands covers the turnover before tax of this premises, not including any other premises if you have them? [SHOWCARD 6]</b>		(S)
£0 to £49,999	1	①
£50,000 to £99,999	2	②
£100,000 to £199,999	3	③
£200,000 to £299,999	4	④
£300,000 to £399,999	5	⑤
£400,000 to £499,999	6	⑥
£500,000 to £750,000	7	⑦
Over £750,000	8	⑧
Don't know [Do not prompt]	9	⑨
Prefer not to say [Do not prompt]	10	⑩

<b>Q8a. Imagine that your turnover next year was larger, even if you do not expect it to be; would that mean would employ more staff?</b>			(S)	Go to
Yes	1	①		Q8b
No	2	②		Q9
Don't know [Do not prompt]	3	③		Q9
Prefer not to say [Do not prompt]	4	④		Q9

<b>Q8b. In whole Pounds, what extra level of turnover would necessitate more staff? [SHOWCARD 7]</b>			(S)
Extra £10,000 or less	1	①	
Extra £10k-30k	2	②	
Extra £30-60k	3	③	
Extra £60-100k	4	④	
Extra £100k+	5	⑤	
Don't know [Do not prompt]	6	⑥	

<b>Q9. What is the rental value of your premises per annum?</b>		(S)
Rental value per annum		
I own the premises [Do not prompt]	1	①
Don't know [Do not prompt]	2	②
Prefer not to say [Do not prompt]	3	③

<b>Q10. Lastly, on a one to five scale where one is Strongly Disagree and five is Strongly Agree, how far do you agree or disagree with the following statements... [SHOWCARD 8]</b>						
	Strongly disagree	Disagree	Neither/ Nor	Agree	Strongly agree	Don't know [Do not prompt]
I am optimistic of the trading conditions in the near future.	①	②	③	④	⑤	⑥
Bognor Regis is a good place to run my business.	①	②	③	④	⑤	⑥