Cheltenham Business and Place Survey

September 2019

Wavehill: social and economic research

- Wales office: 21 Alban Square, Aberaeron, Ceredigion, SA46 0DB (registered office)
- West England office: 12 Orchard Street, Bristol, BS1 5EH
- North of England office: Milburn House, Dean Street, Newcastle, NE1 1LF
- London office: 52 Cecile Park, Crouch End, London, N8 9AS

Contact details:

Tel: 01545 571711
Email: wavehill@wavehill.com
Twitter: @wavehilltweets

More information:

www.wavehill.com
https://twitter.com/wavehilltweets

Report authors:
Declan Turner
Oliver Allies
Paula Gallagher

Any questions in relation to this report should be directed in the first instance to Declan Turner (declan.turner@wavehill.com)

Date of document: September 2019
Version: Final

Client contact:
Tracey Crews | Tracey.Crews@cheltenham.gov.uk

Acknowledgements

We would like to thank the many individuals who gave their time to assist in the evaluation, including the respondent business managers and owners, their employees and those who promoted the survey through their networks. This evaluation would not have been possible without all of these contributions.

Contents

Table of tables

Table of figures

Executive Summary

In order to help understand the latest challenges and opportunities facing businesses and employees living, working and conducting business in Cheltenham, a two-part survey was undertaken by Wavehill on behalf of Cheltenham Borough Council. The survey captured the perspectives of employers and their employees on a range of areas, providing a picture and evidence base for Cheltenham Borough Council with which to better address the needs of the town.

For both employers and employees, Cheltenham provides opportunities ranging from quality of life to a highly skilled labour population and good job opportunities. For employees living and working in the area, transport, cost of living (particularly house prices) and a lack of career progression were all issues. For businesses, key concerns comprised hard-to-fill vacancies, skill levels in the available labour market, and Brexit, though on this latter point the perceived impacts were divided. Hard-to-fill vacancies are disproportionately impacting upon smaller businesses and are likely generated by the low unemployment and high cost of living in Cheltenham.

Where specialist skills shortages were acting as a barrier to business, they often related to specific needs of the industry and enterprise. Barriers for employees such as the high costs of living in Cheltenham may be hindering the flow of labour required to meet these needs, whereby compounding the issue of high competition for skilled workers in an already tight labour market. Despite these concerns, economic performance in Cheltenham has been strong, and the surveyed businesses report a high degree of confidence over the next 12 months.

The report shows that housing costs were a barrier to living and working in Cheltenham for 81 per cent of employees and 72 per cent of employers. Fifty-three per cent of employee respondents had, however, moved to Cheltenham as adults, demonstrating that there is an attraction to the town. For 79 per cent of these movers, good job opportunities were very important or somewhat important to their decision as to whether to move to the town. Overall, 60 per cent felt that Cheltenham offers an excellent quality of life and easy accessibility to core cities in the UK (54 per cent).

Proportions of vacancies in Cheltenham were similar to those of both the UK and Gloucestershire; however, the densities of vacancies in Cheltenham were higher than in the UK across all occupations. Elementary, Care and Skilled Trade occupations were 29, 21 and 21 percentage points higher, respectively, than the results from the Employer Skills Survey for the UK.

The proportion of hard-to-fill vacancies due to skills shortages was 81 per cent in Cheltenham compared to 67 per cent across the UK and 78 per cent in Gloucestershire. Despite this, ONS and employee data reveals that Cheltenham has more highly skilled residents than do the region and the UK. Skills shortages lay mainly in specific skills relating to the business or sector, but also in basic skills such as maths and soft skills.

Retention of staff has been more difficult in Cheltenham than in Gloucestershire in occupations with a higher proportion of lower skills. Sales, Administrative and Care occupations were all reportedly more difficult to retain by approximately 10 percentage points each. Furthermore, wage competition was the most frequent reason for the difficulty in retaining staff — 36 per cent more than was reported in Gloucestershire.

Impacts of hard-to-fill vacancies on businesses have comprised increasing costs and reducing efficiency, with 40 per cent of enterprises reporting increased operating costs and 32 per cent stating that they have outsourced work. Nineteen per cent report that they have lost business to other competitors as a result and 94 per cent of respondent’s state that the inability to recruit has increased existing staff workload. Business responses to hard-to-fill vacancies also comprise increasing costs, with 30 per cent increasing recruitment expenditure and 15 per cent offering jobs to less qualified recruits with additional training.

ONS data suggests that there are a similar amount of approaching retirees in Cheltenham compared to in the rest of the UK. However, of the sampled businesses, 24 per cent expect more than the average number of retirees in the next five years.

Turnover expectations among Cheltenham businesses were similar to those among Gloucestershire businesses, with 45 per cent expecting an increase in the next 12 months, which is higher than the UK result (36 per cent) from the Small Business Survey.

Sixty per cent of employers gave the lack of accessibility to places of business as a barrier to trading in Cheltenham, while other results such as the lack of work-ready candidates and the lack of talent in the labour market supported the results found on vacancies and recruitment elsewhere in the results.

Approximately one quarter of businesses felt that they had noticed some impact of Brexit thus far, with another quarter expecting some impact in the future. These results were higher than for Gloucestershire, wherein 19 per cent felt that they had noticed an impact and 15 per cent thought that they would see an impact in the future.

1 Introduction

Cheltenham Borough Council commissioned Wavehill in November 2018 to undertake a survey of businesses and their employees in Cheltenham. The survey was commissioned in order to understand the reasons for, and barriers to, living and conducting business in Cheltenham from the perspective of both employers (businesses) and employees. Insights into recruitment difficulties and vacancies, skills shortages, Brexit risks, transport challenges, staff retention, and inflows of labour were brought together as part of the survey.

The survey adopts questions from the Employer Skills Survey, which has been carried out nationally since 2011, and other Wavehill surveys, such as one of Gloucestershire businesses in 2018. This allows some comparisons to be made in the results, and ensured that the survey questions were well tested before the survey was put into the field.

1.1 Methodology

In order to understand the barriers and opportunities facing employers and employees in Cheltenham, a survey was developed with support from Cheltenham Borough Council. The survey tool was designed in two parts so as to encourage the highest response rate. The first part involved a telephone survey of employers in the Cheltenham area, which was provided by Cheltenham Borough Council and supported by other contact databases. The second element of the survey used the employer contacts established through the initial exercise to disseminate an online survey to their employees. This shorter survey was designed to support the employer survey, while the online mode leant itself to the minimisation of open-ended and qualitative responses. An anonymised 'top line' of the resultant data from the employees for each employer was also offered in order to encourage participation.

The telephone survey of employers in Cheltenham was run for seven weeks between March and May 2019. Returning 92 responses against a target of 75, the response rate provides a statistical representation of the 5,255 businesses in Cheltenham to a 90 per cent confidence interval.[1] The businesses were based in the following sectors:

- Education (15)
- Accommodation & food services (14)
- Retail (12)
- Health (11)
- Arts, entertainment, recreation & other services (8)
- Professional, scientific & technical (7)
- Business administration & support services (4)
- Construction (4)
- Information & communication (including digital and cyber) (3)
- Manufacturing (3)
- Property (3)
- Wholesale (3)

[1] Business Counts, ONS, 2018

- Public administration & defence (2)
- Transport & storage (2)
- Financial & insurance (1)

Where respondents had agreed to participate in the second employee survey, they were contacted again with a link that they could disseminate to their staff. This online employee survey was open for two weeks in late May, though it was extended to four weeks so as to encourage a greater response rate. The employers were prompted on several occasions during this period to encourage the participation of their employees in the survey. While 81 employees completed the survey, there was a little increase in response rates despite the encouragement of the employers with respect to promoting the survey. With the resources available there was no scope for another approach to surveying the employees; therefore, it was decided that, with further increases in responses unlikely, the employee survey should be closed.

While the response rate (81) to the employee survey was below what was expected, which limits the extent to which results can be applied, the results do provide an indication of the attitudes of individuals living and working in Cheltenham and, therefore, are presented in the findings below in support of the employer survey. The nature of the survey also means that while the employees themselves were not self-selecting, they were identified from the businesses engaged in the employer survey; therefore, their views may not be representative of all employees in Cheltenham. Moreover, the 81 respondents derived from 16 businesses, though 60 per cent derived from only three of the 16 businesses.

In order to increase the response rate to the employee survey, a telephone survey of employees or an open online survey pushed to all working residents in Cheltenham would supplement the findings of this research.

Responses to the surveys were analysed using MS Excel and Qualtrics, and qualitative responses were coded (so as to provide numerical data) or have been quoted in the report below. These have been compared to and benchmarked against results from the Employer Skills Survey,[2] the Small Business Survey,[3] and the Gloucestershire Business Survey, which was completed by Wavehill in 2018.[4] While the quoted qualitative responses in the surveys have only been referenced in this report where they have support from other responses, as well as providing a useful insight into the thoughts of individual businesses or employees in Cheltenham, they may not represent all viewpoints.

1.2 Economic Context

To provide the background to this study of businesses and place in Cheltenham, below is a summary of the latest economic position taken from publicly available statistics such as ONS sources.

[2] Employer Skills Survey, Department for Education, 2017

[3] Longitudinal Small Business Survey, Department for Business, Energy and Industrial Strategy, 2017

[4] Gloucestershire Countywide Business Survey, Wavehill on behalf of Gloucestershire County Council, 2018

1.2.1 Population

The large town of Cheltenham has an estimated population of 117,100 residents, of whom 63.4 per cent are of a working age.[5] The age demographics of Cheltenham are presented in Figures 1.1 and 1.2 and reveal that Cheltenham has a similar age profile to that of the UK and is facing the same ageing population. Growth in the over-65 population in Cheltenham since 1991 has, however, been 17 per cent, while the over-65 cohort in the UK has increased by 32 per cent over the same period. While there are ageing population pressures in Cheltenham, they are not as acute as they are in other parts of the country.

Figure 1.1: Population of Cheltenham by Age (2017)

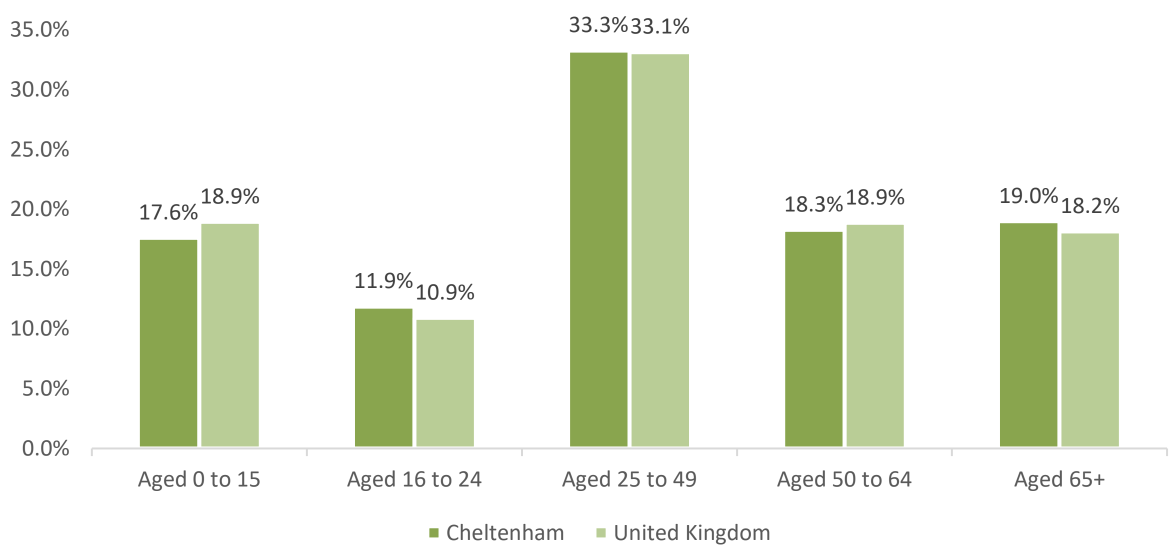
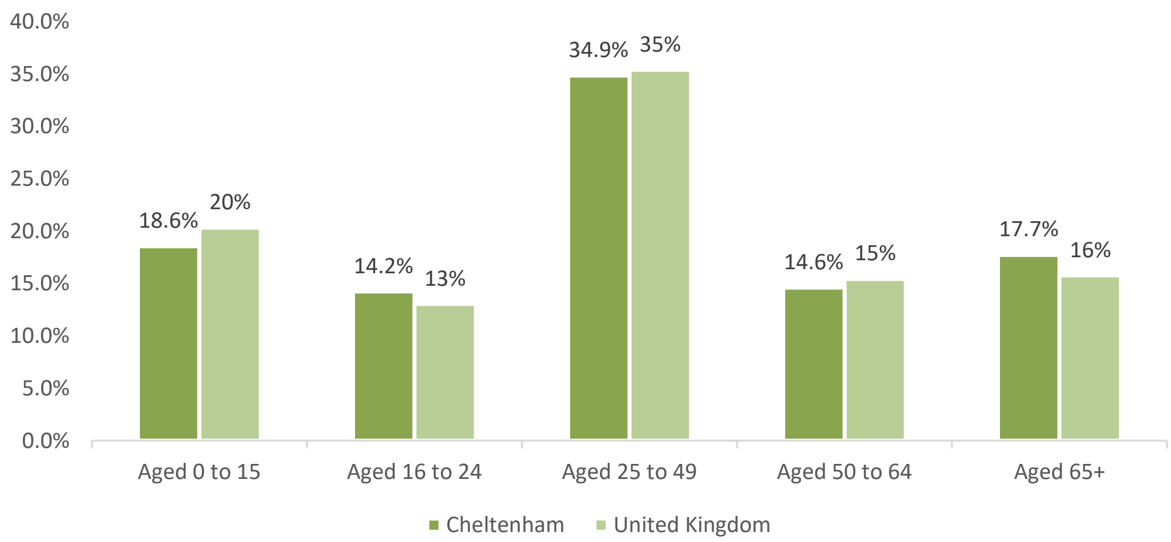


Figure 1.2: Population of Cheltenham by Age (1991)



[5] Mid-year population estimates, ONS, 2018

1.2.2 Employment

The rate of economic activity of Cheltenham residents is high at 82 per cent of the working-age population (above the regional and national averages), and the employment rate in Cheltenham fluctuates around the LEP and South West regional average, as shown in Figure 1.3.[6] ILO unemployment is low at 1.9 per cent of the working-age population, below both the national and the regional rates of 4.3 and 3.2 per cent respectively, as shown in Figure 1.4.[7]

Figure 1.3: Employment Rate in Cheltenham, Gloucestershire LEP, SW and UK

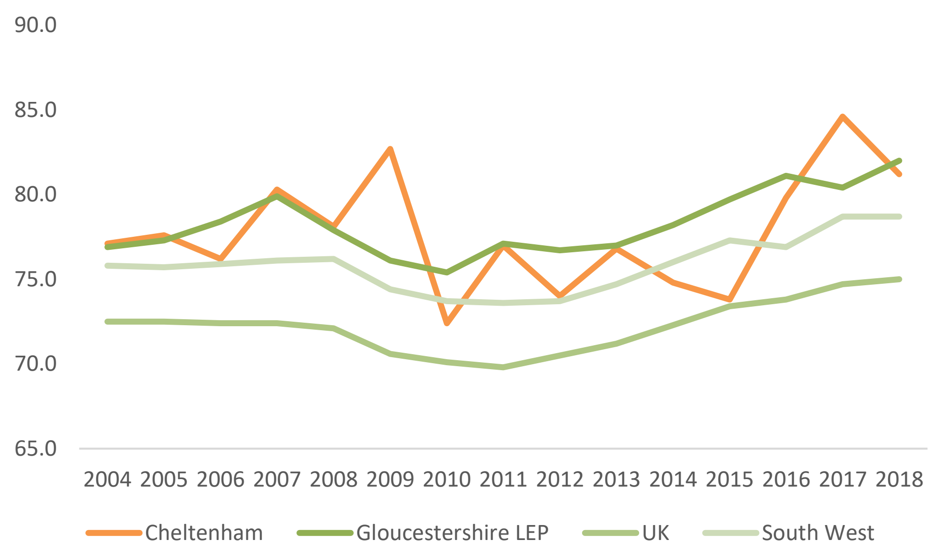
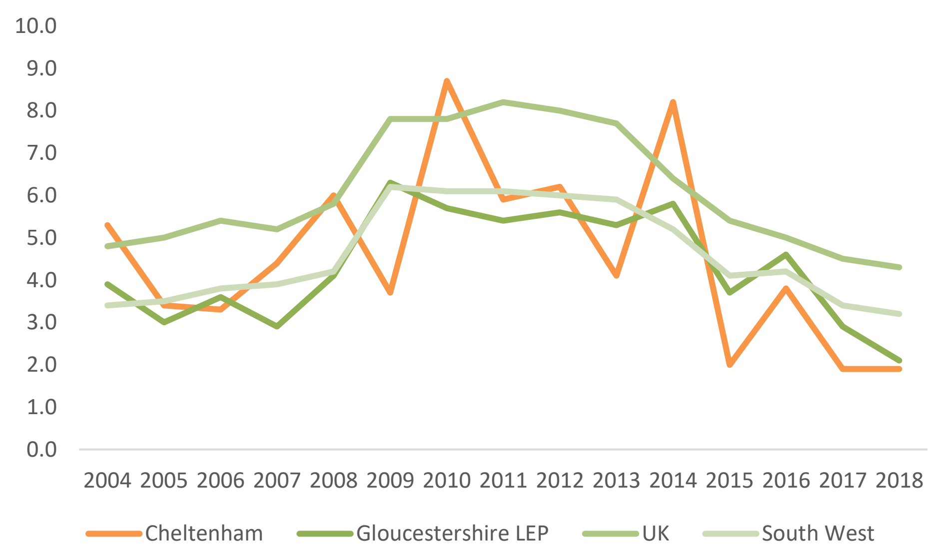


Figure 1.4: Unemployment Rate in Cheltenham, Gloucestershire LEP, SW and UK



[6] Annual Population Survey, ONS, 2018

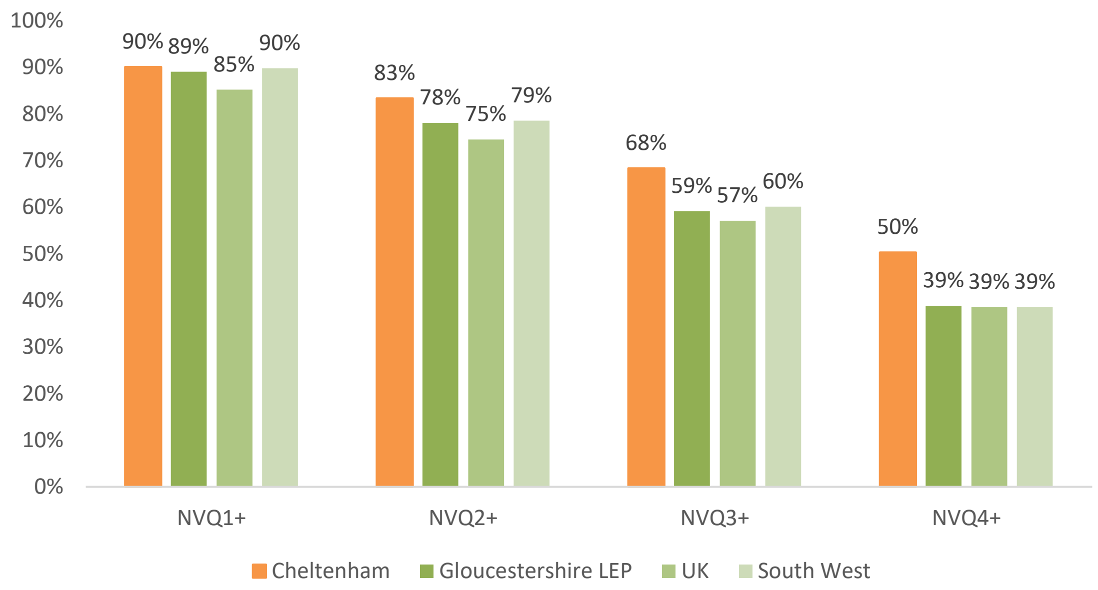
[7] Annual Population Survey, ONS, 2018. International Labour Organisation definition of unemployment is used here.

Job density provides an insight into the availability of jobs for the resident working-age population and is comparable across regions of different sizes. In Cheltenham the job density is 1.01, which is much higher than the UK and regional levels of 0.86 and 0.89 respectively.[8] That there is such availability of employment is a benefit to the local residents and, given that the employment rate is 81.2 per cent, also benefits inward commuters from other areas.

1.2.3 Skills and occupations

Qualifications among the Cheltenham working-age population are higher than the regional and national averages across all levels above NVQ Level 2 or equivalent. At the highest recorded level, i.e. NVQ4+ or equivalent, Cheltenham is 11 percentage points higher than the other areas.[9] This is an important determinant of earnings and employment and provides an important context to the remarks made in the survey results (Section 2.3) that there are skills shortages in the Cheltenham area.

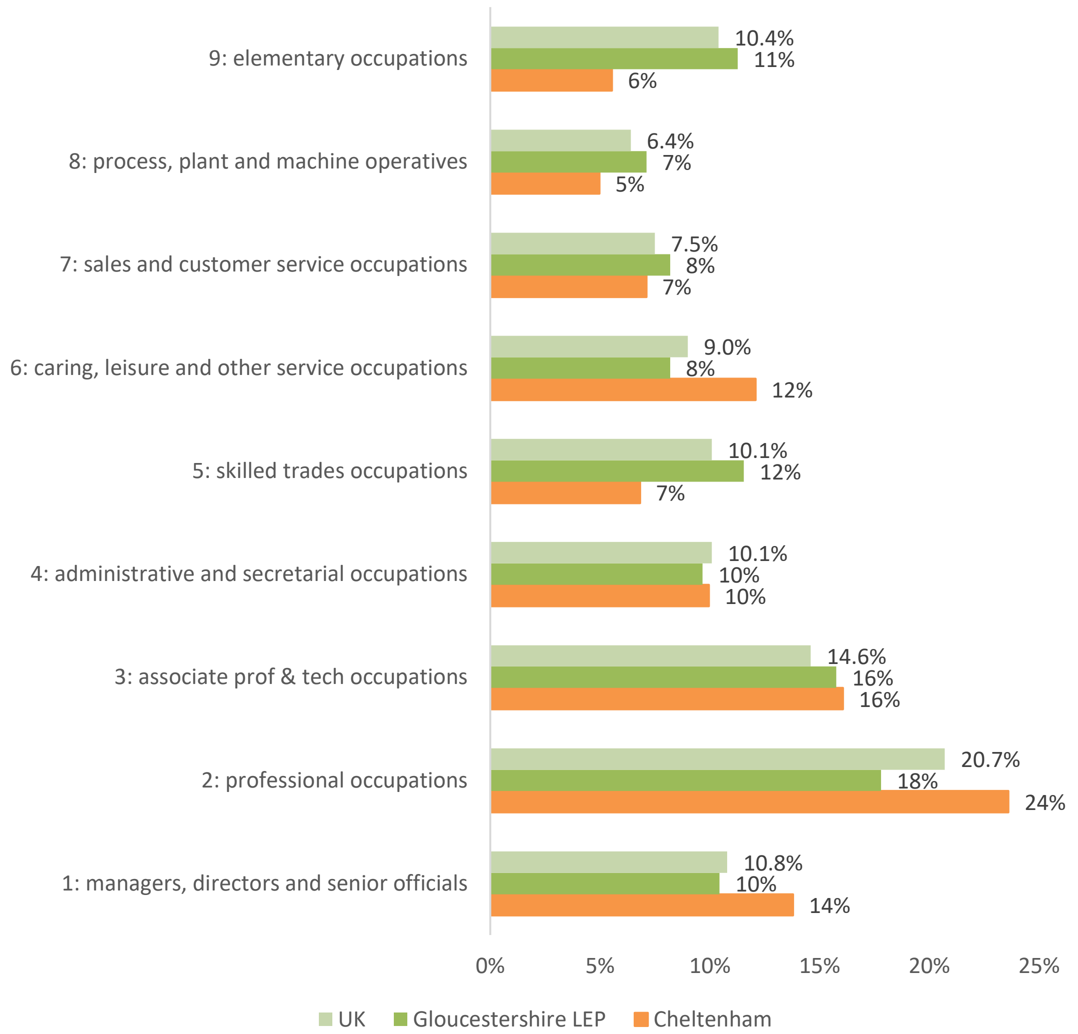
Figure 1.5: Qualification proportion of working age resident population in Cheltenham, Gloucestershire LEP, SW and UK, three-year average (2016-18)



There are a greater proportion of occupations in Cheltenham in higher-skilled work such as managers and professional jobs.[10] There are much fewer elementary occupations and other typically lower-skilled occupations such as care and sales. Experience in these occupational areas shapes the labour market and where there is lower employment in one area, it may be more difficult to recruit employees to that occupation. It could also be that Cheltenham has fewer jobs in these lower-skilled occupational areas because of the higher skill level of the area and working-age residents do not wish to pursue low-skilled work.

[8] Job Density, NOMIS, 2018
[9] Annual Population Survey, ONS, 2018
[10] Annual Population Survey, ONS, 2018

Figure 1.6: Workplace based occupation proportions (SOC2010) in Cheltenham, Gloucestershire LEP and UK

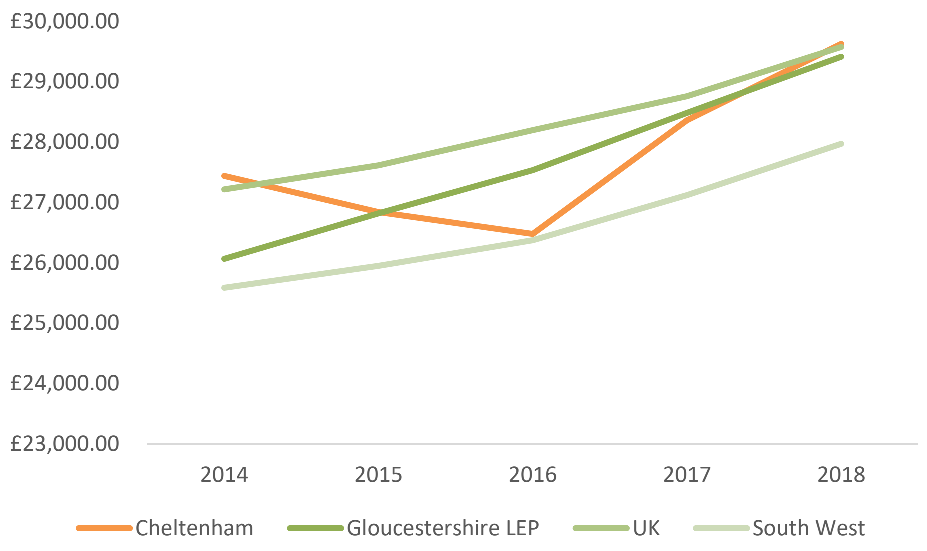


1.2.4 Earnings

Earnings for those working in Cheltenham are at £29,625 per annum, higher than the UK, South West and Gloucestershire averages.[11] With some fluctuations between 2014 and 2018, growth of earnings in Cheltenham has been similar (eight per cent) to the regional and national rates, though this is below the growth in the Gloucestershire LEP, i.e. 12.8 per cent. While earnings impact upon deprivation, like many urban areas, Cheltenham has Lower Super Output Areas (LSOA) of high and low deprivation.[12] Some of these areas of deprivation are in the 10 per cent most deprived and others are in the 20 per cent least deprived. Employment is an important issue for several of these most deprived LSOA pockets, with the Hester's Way ward low on nearly all indices of deprivation.

[11] Annual Survey of Hours and Earnings, ONS, 2018
[12] Indices of Multiple Deprivation, Ministry of Housing, Communities and Local Government, 2015

Figure 1.7: Average annual resident-based earnings



1.2.5 Sector composition

Sector composition in Cheltenham is a reflection of its urban nature and, therefore, its situation of services such as hospitals, schools, retail, and offices which support IT, Finance and Professional businesses. Employment by sector is shown in Figure 1.8 and reveals that Professional, scientific and technical activities account for 9.8 per cent of all employment, above the levels of the region and country.[13] Similarly, other high-skilled, highly productive sectors such as Finance and IT are at 4.9 per cent and 6.6 per cent respectively, above the regional and national averages. Manufacturing employment is low in Cheltenham, accounting for 5.7 per cent of jobs, and 1.3 per cent of employment is in Transportation, below the national average of 4.8 per cent.

By business, sector composition is similar to that of employment. There are a greater proportion (22.6 per cent) of businesses in Professional, scientific and technical activities in Cheltenham than the UK and regional levels.[14] Over 12 per cent of the businesses in Cheltenham are in IT and 4.7 per cent are in Finance. At the same level as the UK and the region, 89 per cent of Cheltenham-based businesses are micro (0–9 employees) in size. Growth in the number of businesses in the last five years in Cheltenham has been similar (12 per cent) to the regional and Gloucester LEP rates; however, this is below the national increase of 18 per cent.

[13] Business Register and Employment Survey, ONS, 2018
[14] Business Demography, ONS, 2019

Figure 1.8: Employment by sector (%) for Cheltenham, Gloucestershire LEP and UK

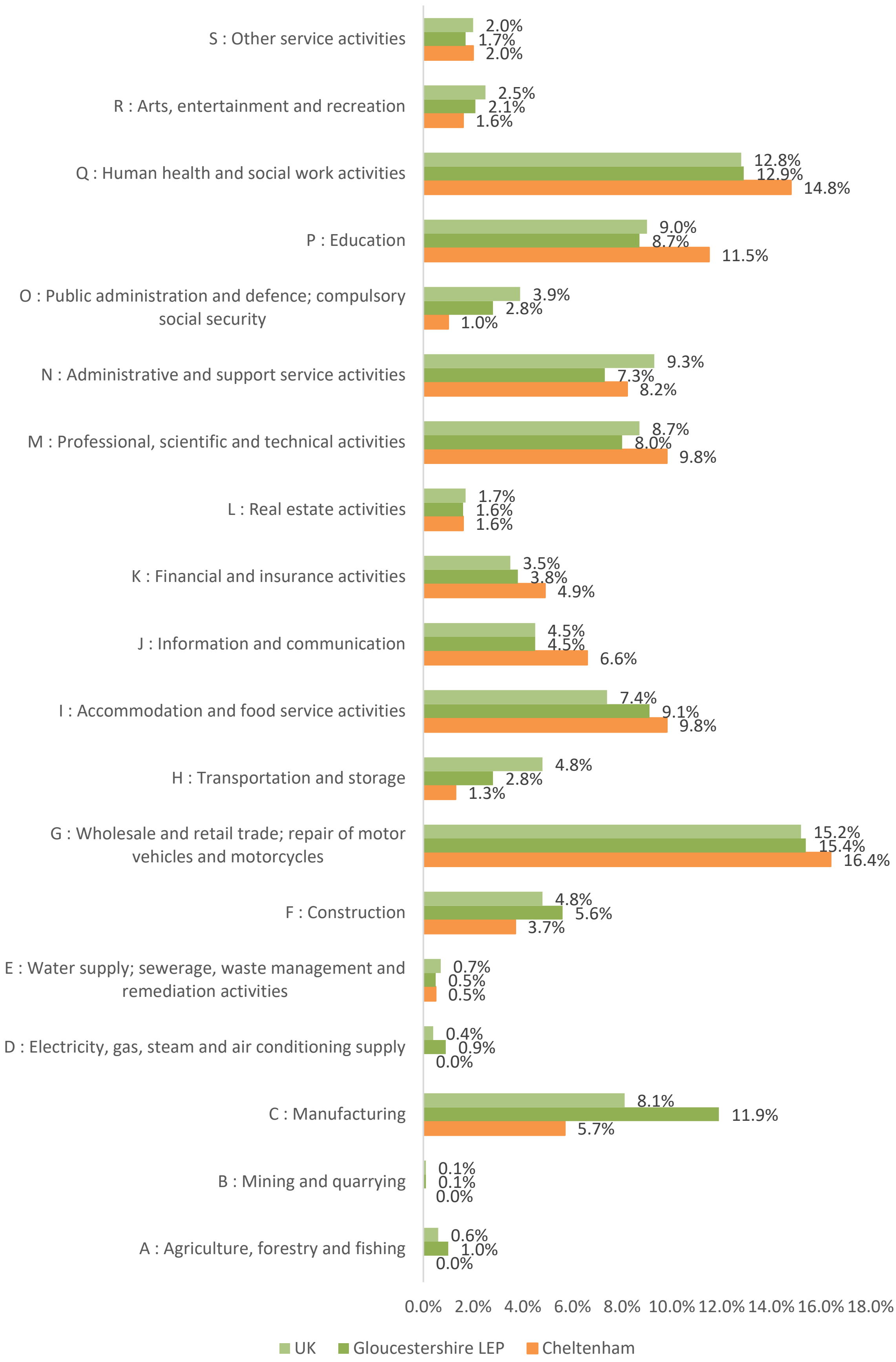
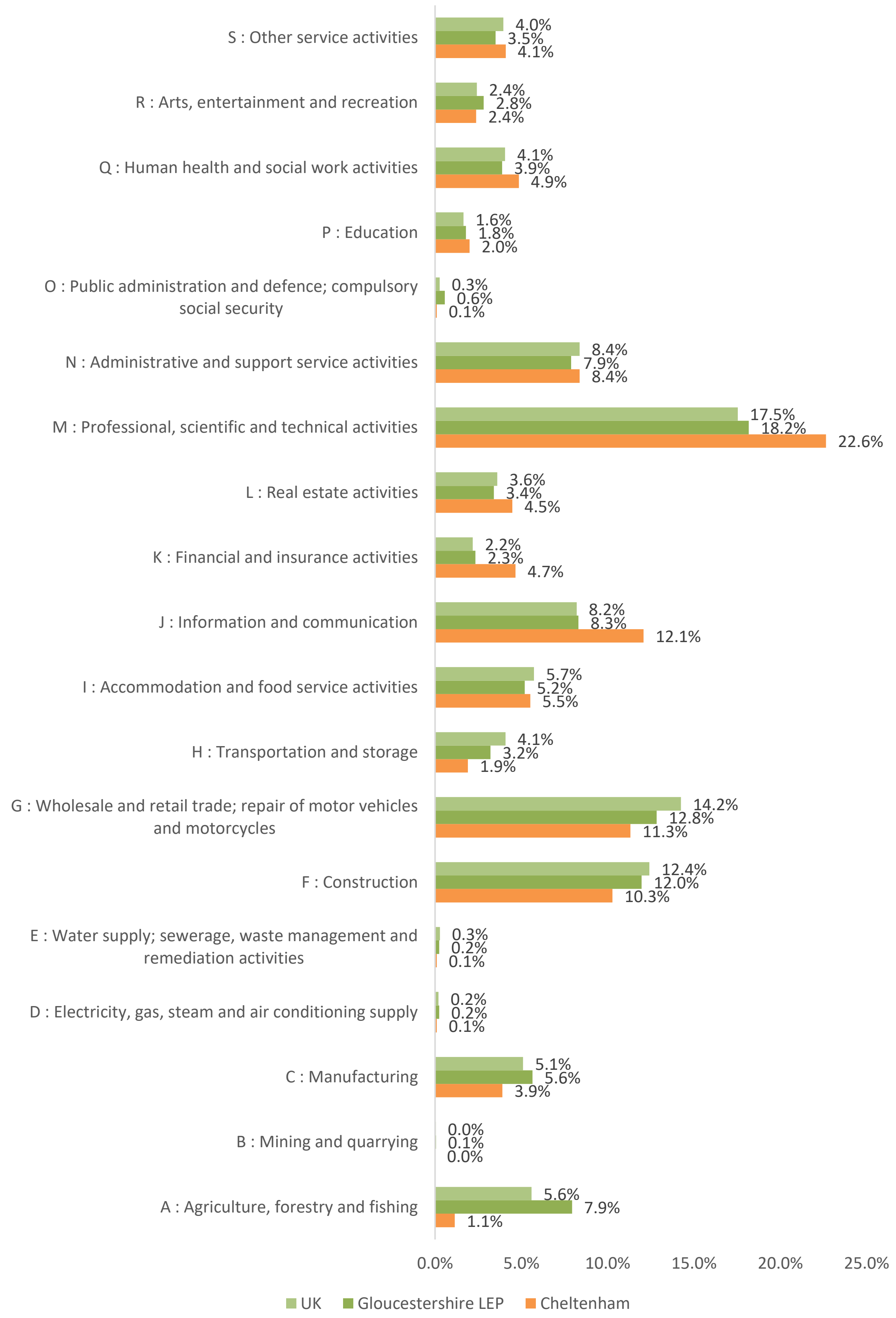


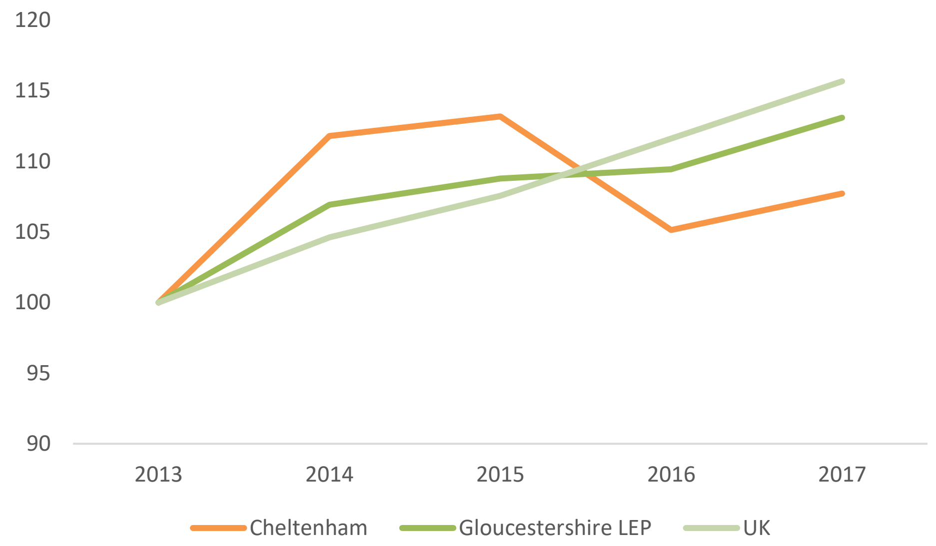
Figure 1.9: Business count by sector (%) for Cheltenham, Gloucestershire LEP and UK



1.2.6 Output

Total output, as measured by Gross Value Added, was £2.974 billion in Cheltenham in 2017,[15] some 18 per cent of the Gloucestershire LEP total of £16.488 billion.[16] The sectors with the largest output in Cheltenham are Real Estate (£439m), Health (£381m) and Professional, scientific and technical activities (£308m). Growth in the last five years since 2012 has been at 7.7 per cent in Cheltenham, below the Gloucestershire LEP rate of 13.1 per cent and the UK rate of 15.7 per cent.

Figure 1.10: GVA growth for Cheltenham, Gloucestershire LEP and the UK, 2013=100



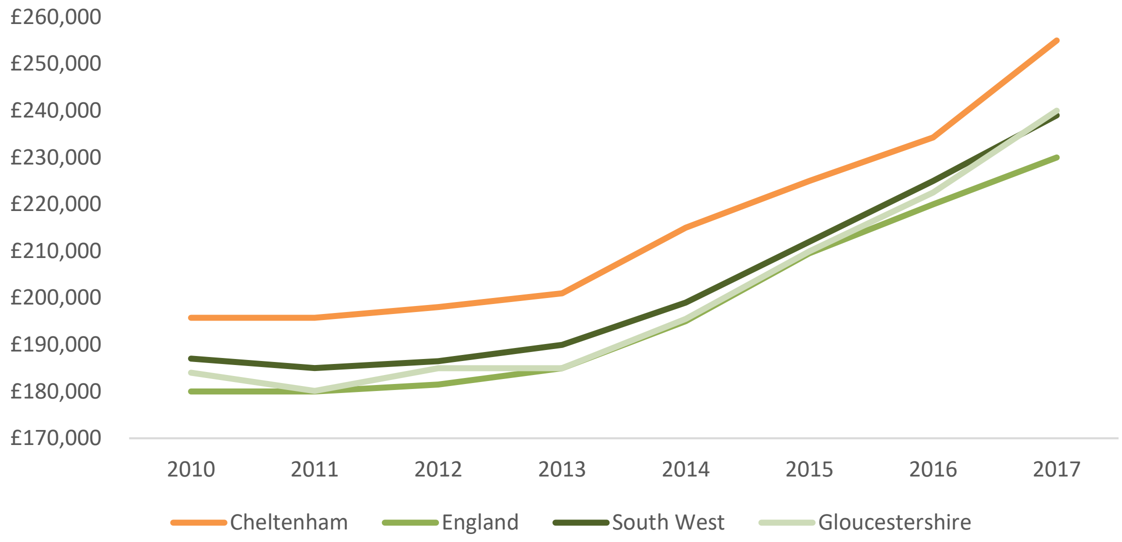
Productivity, as measured through GVA per hour worked, is only available at the Gloucestershire level, though it is revealed that productivity is 1.7 per cent below the national level.[17]

1.2.7 House prices

House prices have an important impact on the local economy, affecting disposable income and the affordability of homes and who relocates to an area or has to move out. In Cheltenham the average house price is £255,000, which is higher than the regional and national averages, as shown in Figure 1.11.[18] With house prices in Cheltenham being raised as part of both the employer and the employee survey responses presented in Chapter 2, house prices are an important context to the research.

[15] GVA (balanced) data tables by Local Authority, ONS, 2018
[16] GVA (balanced) data tables by Local Enterprise Partnership, ONS, 2018
[17] GVA per hour worked data tables, ONS, 2019
[18] Ratio of House Price to Residence-based Earnings, ONS, 2017

Figure 1.11: Average House Prices in Cheltenham, Gloucestershire, England and the South West



1.2.8 Summary

The economic position in Cheltenham is relatively strong, with high earnings reflecting a highly skilled workforce and employment in productive sectors and occupations. While this likely influences the house prices, which are higher than the regional and national averages, the high job density reflecting the prevalence of jobs in Cheltenham helps to ensure low unemployment. This high level of skill and job availability, nevertheless, may create issues for employers looking for lower-skilled staff to perform in less productive occupations. The lower-skilled then also face the affordability concerns born in respect of high house prices, attracting fewer to the area and creating a smaller pool upon which to draw in the labour market.

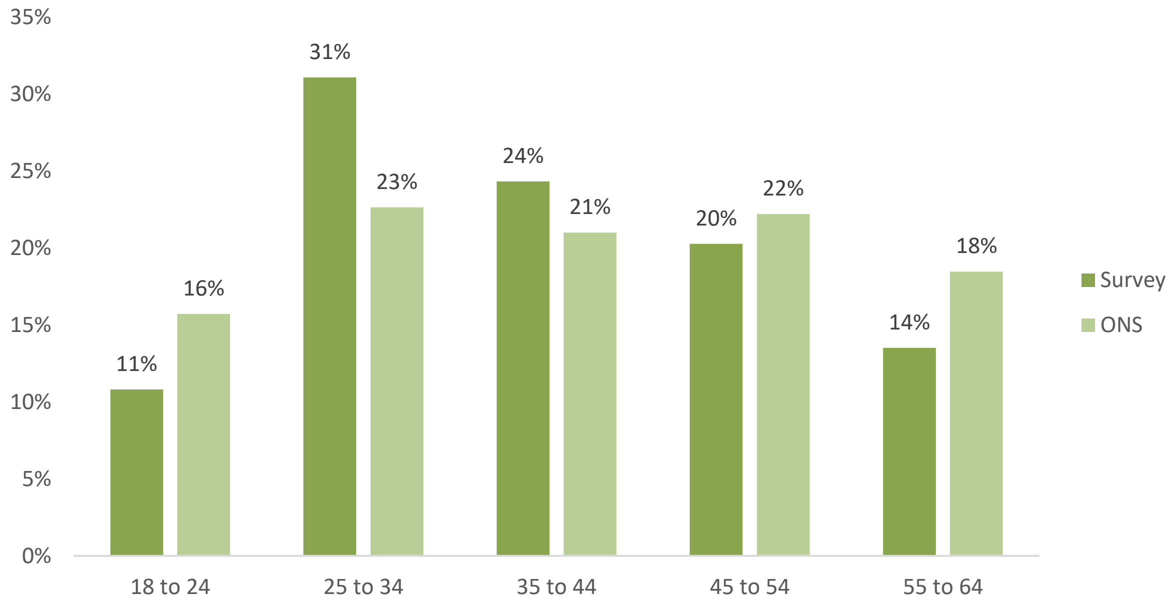
2 Survey Profiles

The sections below present the profiles of the two survey respondents.

2.1 Employee profile

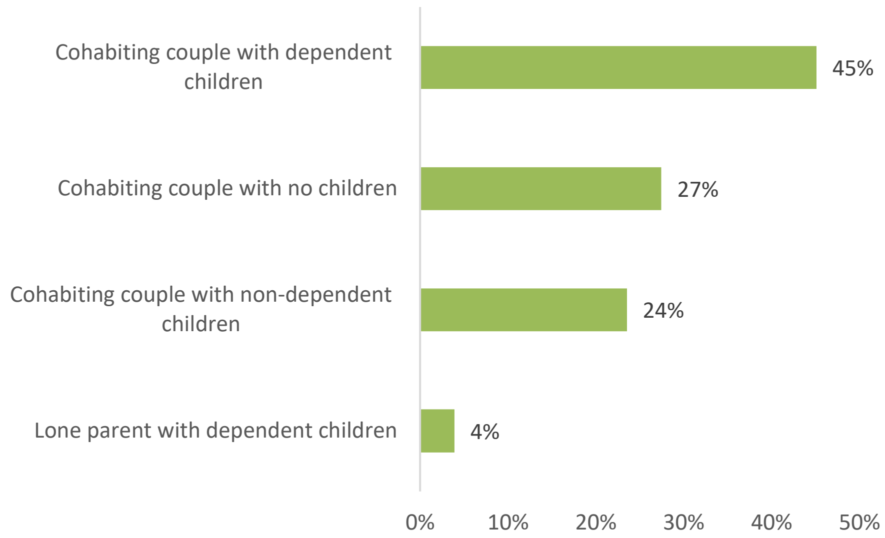
There were 81 respondents to the employee survey from 16 organisations in Cheltenham. The average age of the employees was 39.8 years old and there was a fair distribution across each of the age categories as shown in Figure 2.1, though with slightly more from the middle age categories than the younger and older groups in Cheltenham. There was a greater proportion of females (73 per cent) in the employee respondents compared to males at 28 per cent.

Figure 2.1: Employee survey respondents by age



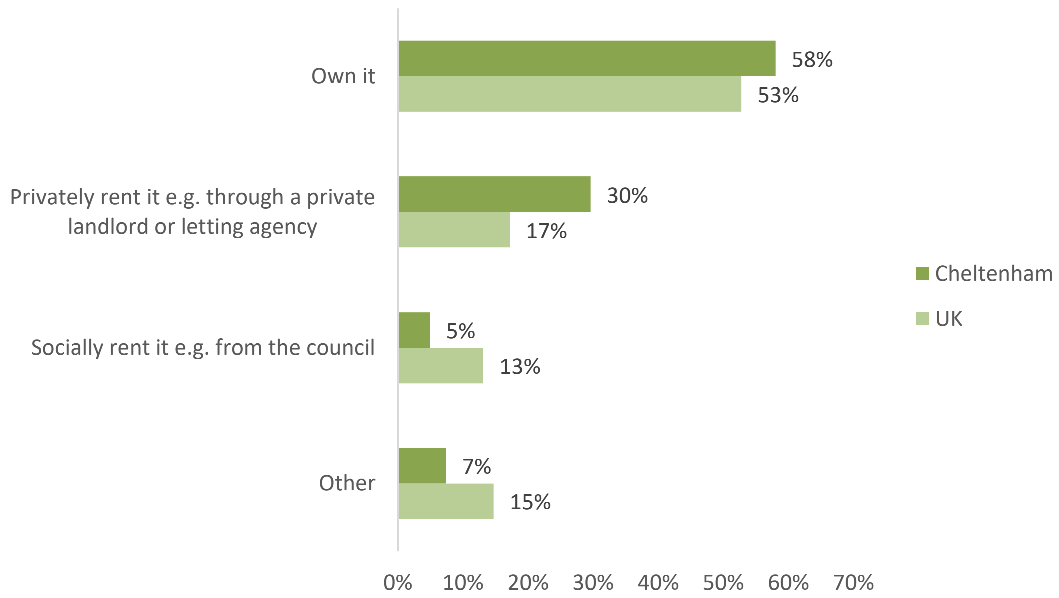
Employee household situations were captured as part of the survey to help corroborate reasons for living and working in Cheltenham (for instance it is assumed that those with dependent children may be more inclined to remain in an area for schooling etc than just for work prospects). The majority of employees (62 per cent, 52/81) were living in single family residences (residences of either couples or parents with children), with 16 per cent residing as the only person in the household. This reflected age with 62 per cent (18/29) of those not living as one family households being below the age of 34 and 74 per cent of those living as a family being over the age of 35.

Figure 2.2: Household situation of surveyed employees



For the majority of employees surveyed they owned their own home (58 per cent, 47/81) while 30 per cent (24/81) rented their home privately. This is an important context to the issue raised in section 4.3 below on house prices and how they affect living in Cheltenham.

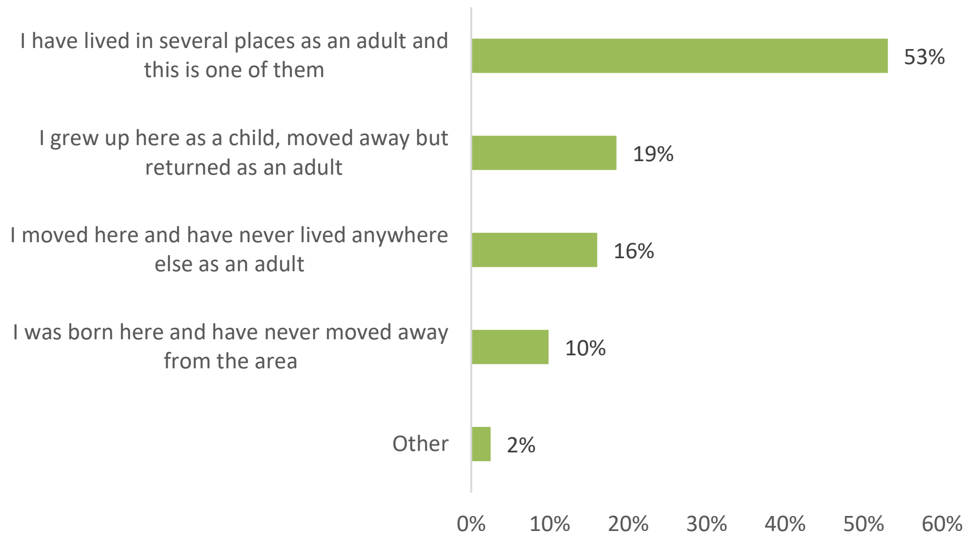
Figure 2.3: Proportions of surveyed employees' who rent or own their homes compared to UK[19]



[19] Home Ownership in the UK, Resolution Foundation, January 2019. Accessed at: https://www.resolutionfoundation.org/data/housing/

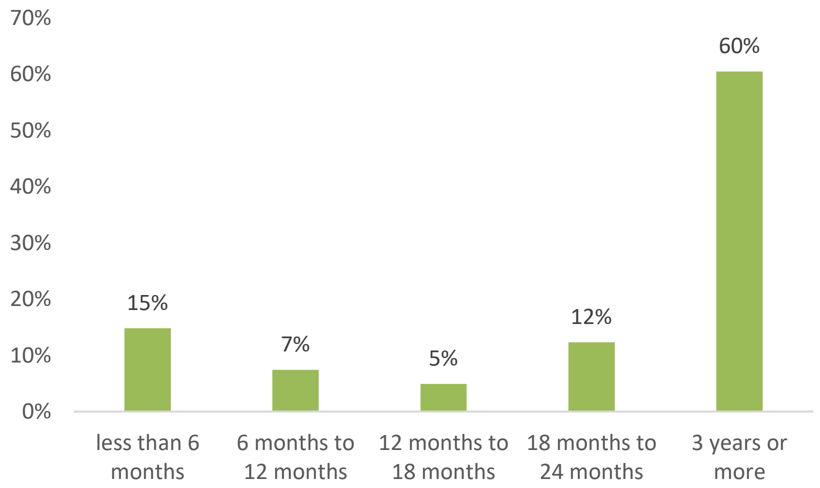
For 53 per cent of the survey respondents Cheltenham was one of several places they had lived as an adult and did not originate from the town. Some 10 per cent of the employees had grown up in the area and never moved anywhere else as shown in Figure 2.4.

Figure 2.4: Relationship of surveyed employees with Cheltenham



The duration of current employment was captured from the surveyed employees and reveals that 60 per cent have been with their company for over 3 years as shown in Figure 2.5. Seventy-two per cent (58/81) of the employees had held other employment in Cheltenham with an average of 2.3 jobs each and a maximum of 7. Approximately 78 per cent (63/81) had held previous employment outside of Cheltenham.

Figure 2.5: Duration of employment with current employer



2.2 Employer profile

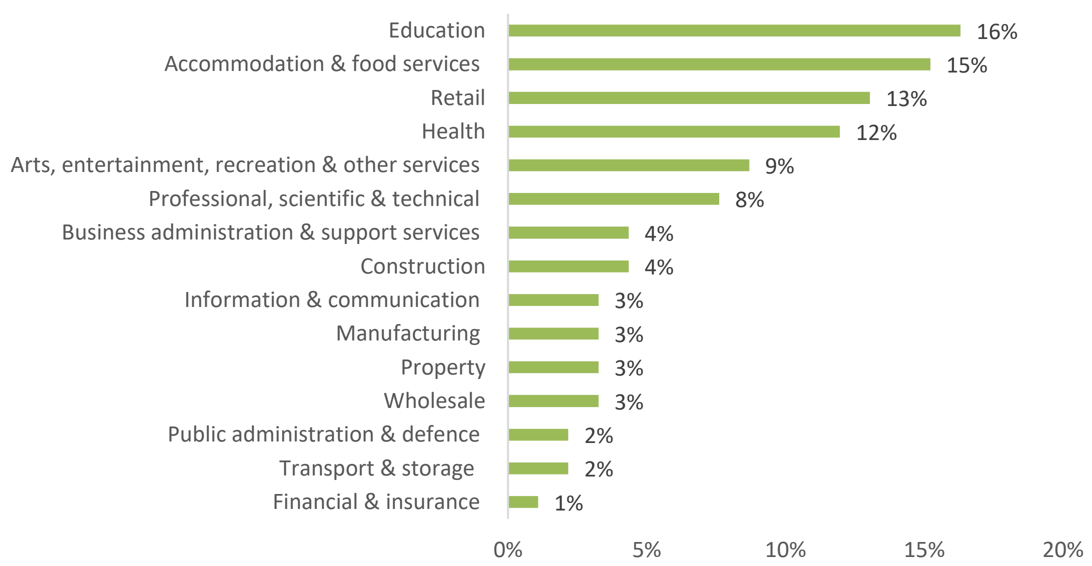
The survey gathered details on 92 businesses in Cheltenham from a range of sectors and sizes. Approximately half of the businesses surveyed only had one site in Cheltenham, the rest being part of either a larger organisation or group with several establishments. Where a business had other establishments 73 per cent operated locations outside of Cheltenham with the remaining 27 per cent being only based in Cheltenham but across multiple sites.

Table 2.1: Size of surveyed businesses by location

Location	Size	Frequency	Percentage
At Site	Micro	19	21%
	SME	71	77%
	Large	2	2%
In Cheltenham	Micro	19	21%
	SME	69	75%
	Large	4	4%
Organisation Overall	Micro	11	12%
	SME	53	58%
	Large	28	30%

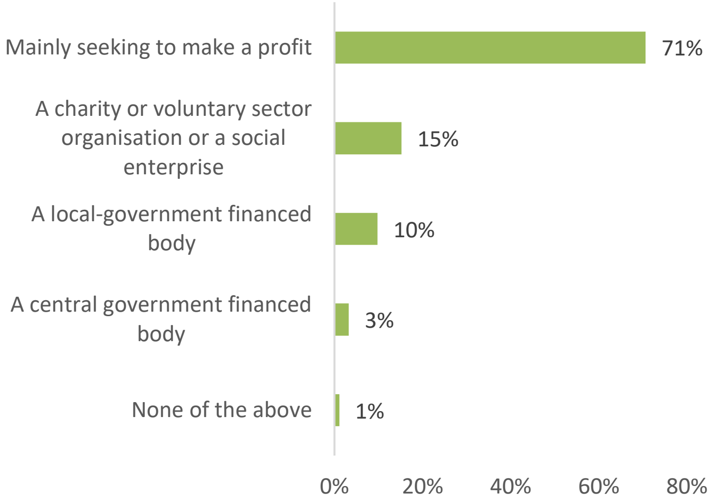
Coded to Standard Industrial Classification (SIC) the businesses surveyed represent fifteen sectors. The most frequently occurring are education (16 per cent, 15/92), accommodation & food (15 per cent, 14/92) and retail (13 per cent, 12/92) as shown in Figure 2.6.

Figure 2.6: Sector of surveyed businesses



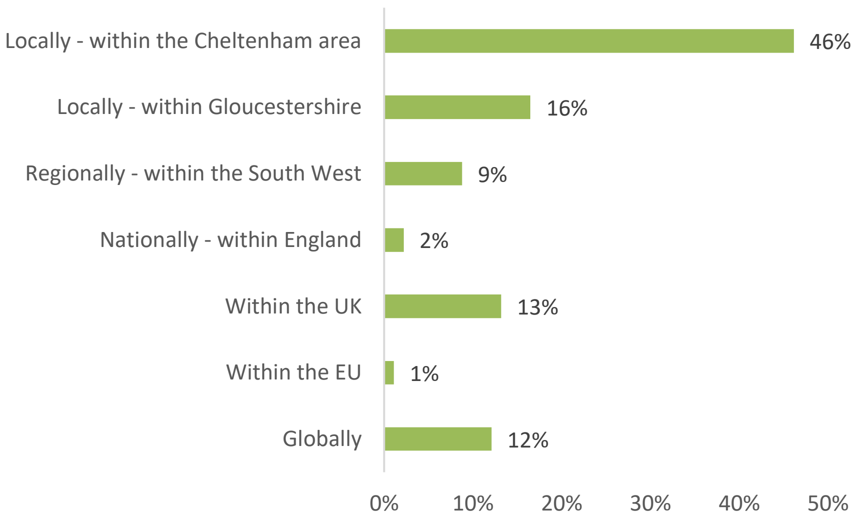
For 71 per cent of the surveyed businesses, profit is the main motivation, though 15 per cent of the organisations are charity or voluntary and 10 per cent are local government financed organisations.

Figure 2.7: Type of organisation



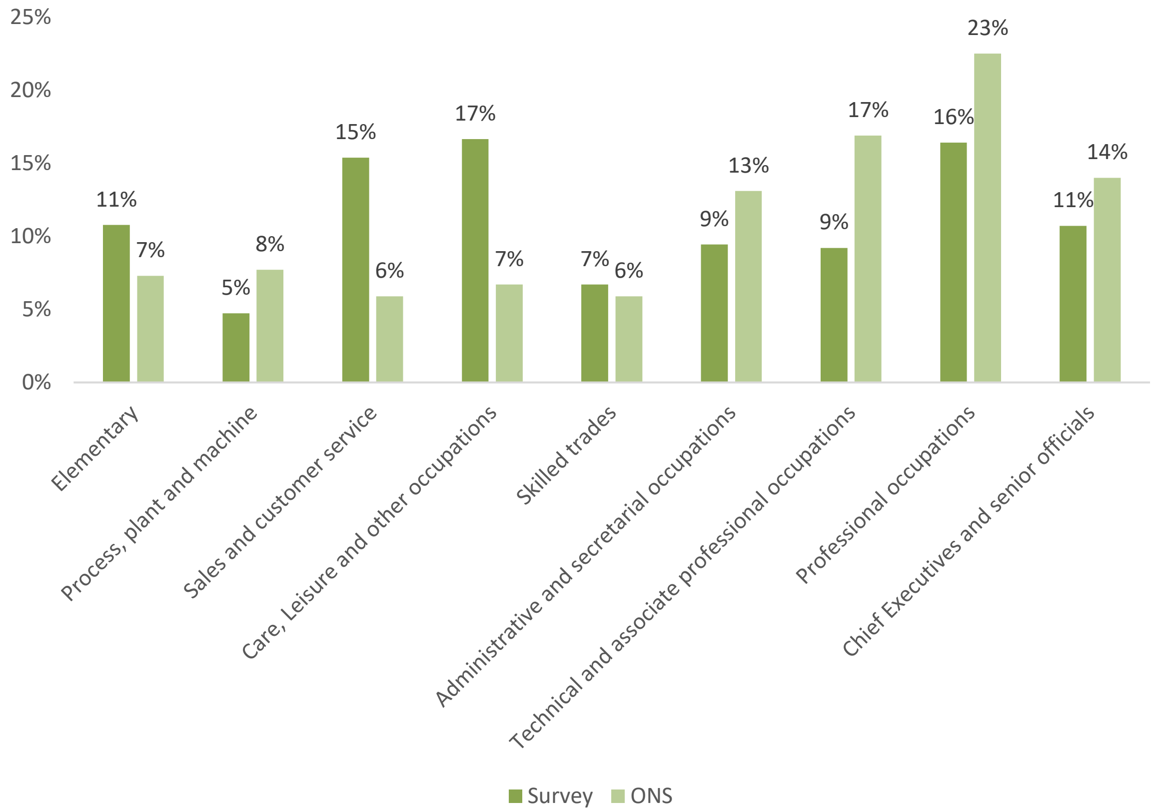
Business sales and services of the surveyed businesses range from the local through to worldwide operations. Over half of the organisations serve local customers in Cheltenham and Gloucestershire, while 12 per cent have sales across the globe.

Figure 2.8: Area of customers and sales operations



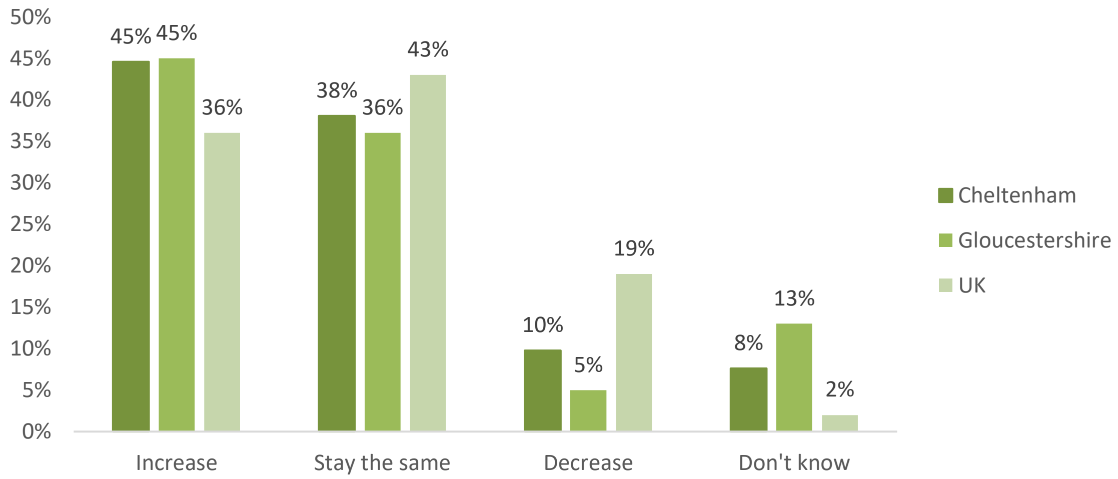
The surveyed businesses employed staff across the nine occupation categories (SOC9). This differs to the economic profile of Cheltenham highlighting some of the limitations with the sample. That there are a larger number of occupations in *sales* and *care* than in the wider population influences the findings in Chapter 3 below.

Figure 2.9: Staff occupations by surveyed business and ONS data for Cheltenham



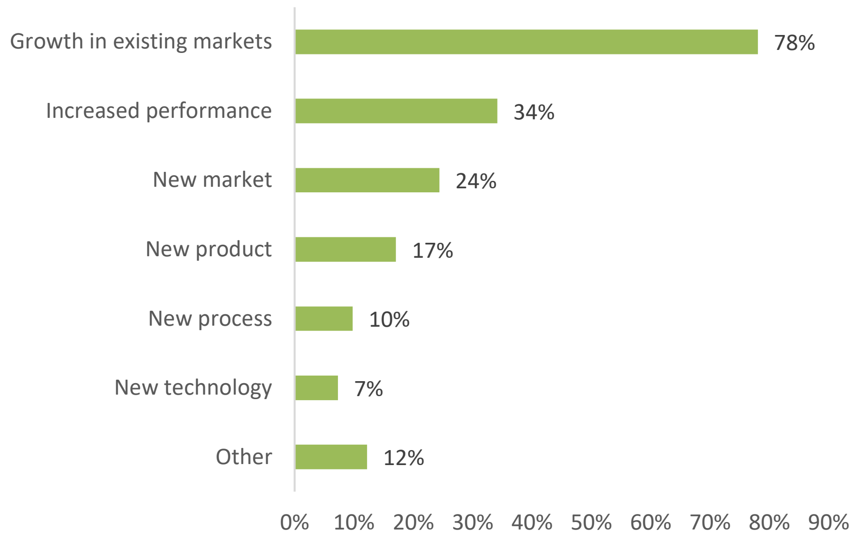
Among the businesses surveyed 45 per cent (41/92) expected to increase their turnover in the next 12 months and a further 38 per cent (35/92) expected their turnover to stay the same. These results are almost identical to the Gloucestershire Business Survey where 45 per cent (413/909) of businesses expected turnover to increase and 36 per cent (331/909) expected turnover to remain the same.

Figure 2.10: Turnover expectations in the next 12 months for Cheltenham, Gloucestershire and the UK



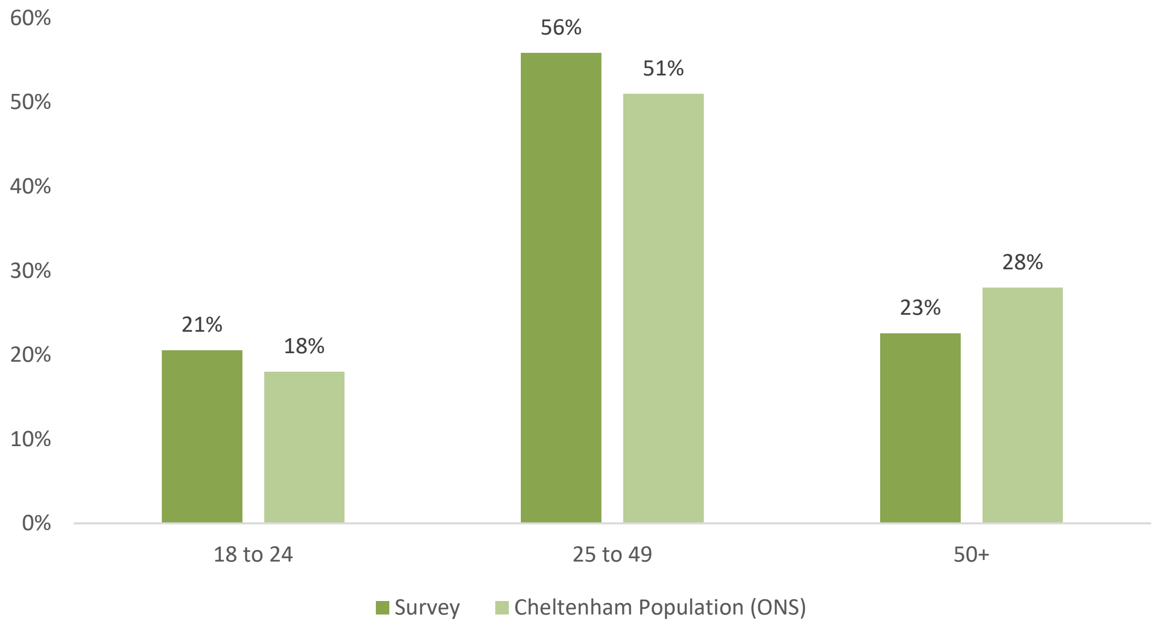
Of those who expected an increase in turnover, the majority (78 percent, 32/41) attributed this to growth in existing markets as shown in Figure 2.11.

Figure 2.11: Reasons for growth in company turnover (multiple response)



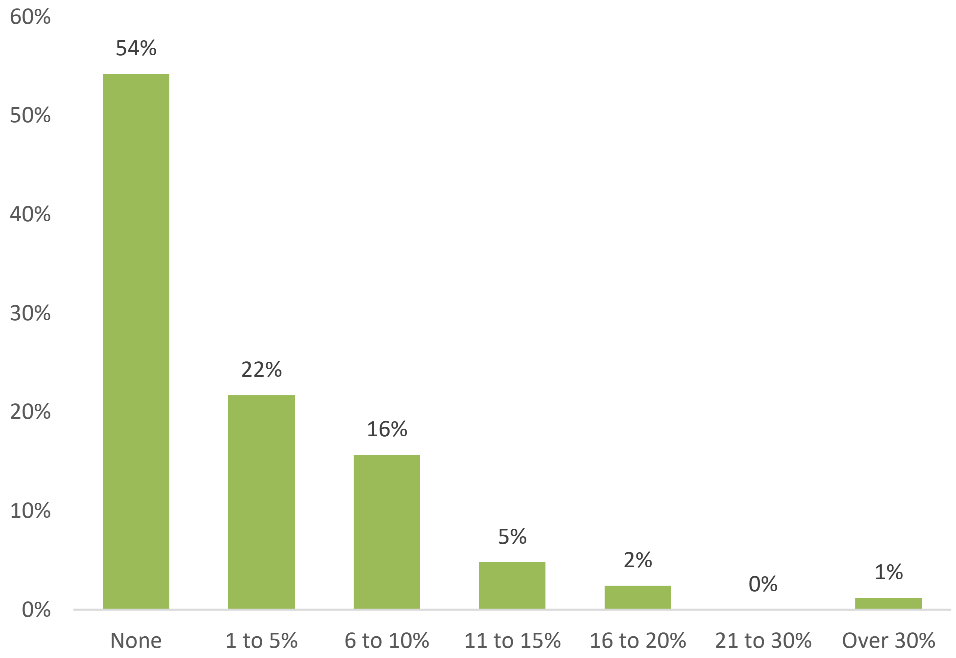
The majority of employees at the companies surveyed in the employer survey were between the ages of 25 and 49. As identified in section 1.2, Cheltenham's citizen composition is ageing and the age composition of employment seems to broadly reflect the overall demographics of the working age population, as shown in Figure 2.12.

Figure 2.12: Age of employees and working age demographics of Cheltenham



Looking at the proportions of staff that are expected to retire in the next three years, some Cheltenham businesses have slightly more retirees than the national average; approximately 1.7 per cent of the population reach retirement age each year for a total of five per cent every three years. Twenty-two percent of businesses expect between one and five per cent of their staff to retire in the next three years, with a further 16 per cent expecting some six to ten per cent to be retiring.

Figure 2.13: Proportion of staff expected to retire in the next 3 years in surveyed employers



3 Business Challenges

The results of the employer survey on barriers and opportunities to doing business in Cheltenham are presented below. The survey covers hard to fill vacancies, skills and Brexit, alongside some analysis comparing the data to benchmarks from other data sources.

3.1 Vacancies

The employer survey reveals the incidence of vacancies (i.e. the number of businesses that are experiencing them) and the density of vacancies (i.e. the volume of vacancies themselves).[20]

Table 3.1 below outlines the conceptual approach used to assess the recruitment challenges and skills shortages among businesses in Cheltenham. It follows the national approach used by the Employer Skills Survey so that Cheltenham results can be contextualised against the national averages.

Table 3.1: Incidence and density of vacancies

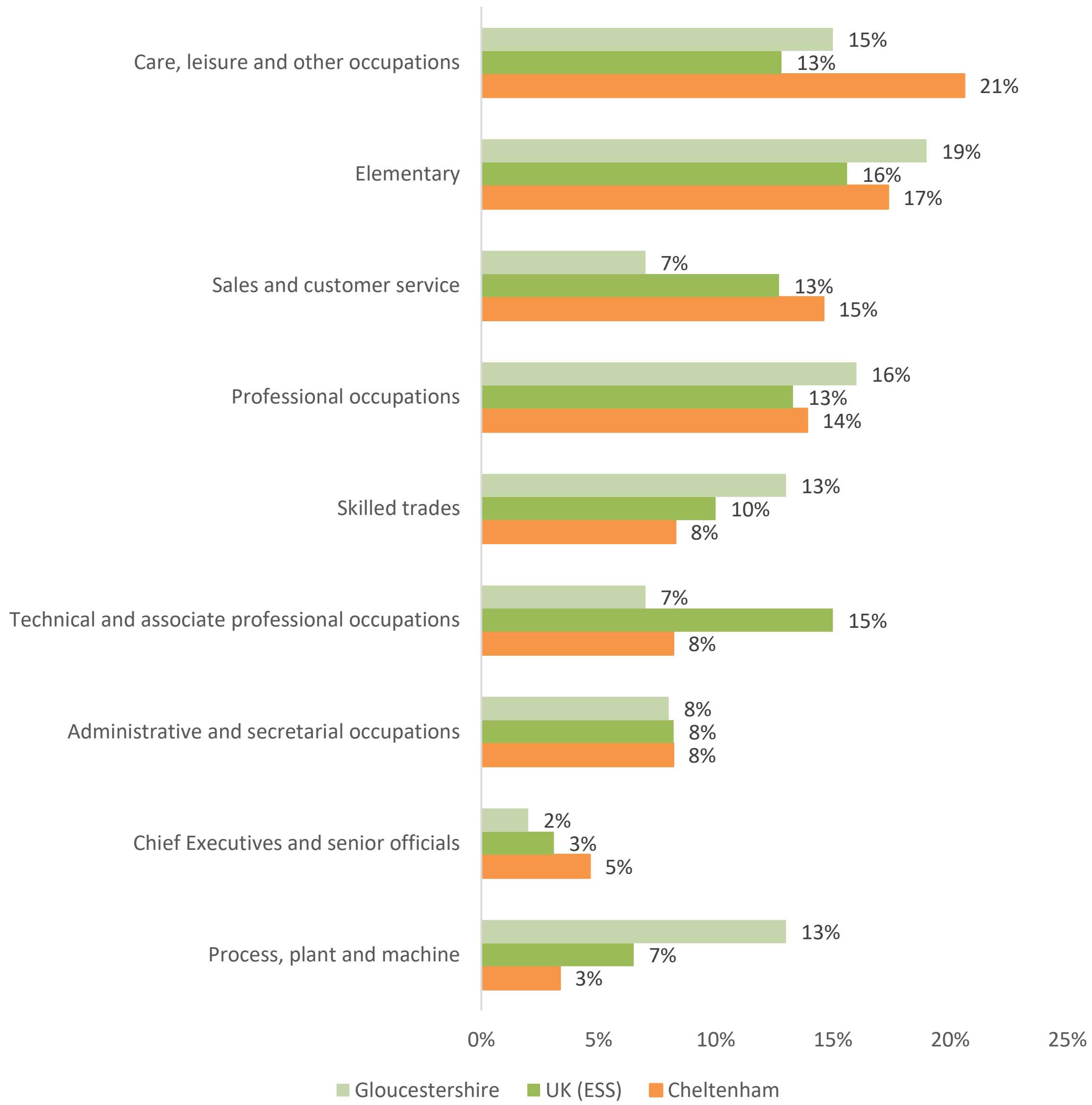
	Vacancies	Hard to fill vacancies	Skills shortage vacancies
Incidence	Proportion of establishments experiencing at least one vacancy	The proportion of establishments reporting at least one hard to fill vacancy	The proportion of establishments reporting at least one skills shortage vacancy
Density	Vacancies as a proportion of all employment	Hard to fill vacancies as a proportion of all reported vacancies	Skills shortage vacancies as a proportion of all vacancies

Addressing the incidence of vacancies revealed that eighty-seven per cent of the surveyed businesses had a vacancy in the last 12 months with 47 per cent (43/92) having between one and five vacancies. The density of surveyed businesses reporting vacancies was 21 per cent, almost level with the national rates reported in the Employer Skills Survey at 20 per cent.

The survey asked the occupation area which these vacancies were in and revealed that the largest proportion were in *care, leisure and other occupations* accounting for 21 per cent (209/1014) of all vacancies. Fourteen per cent (141/1014) of the vacancies were for *professional occupations* and eight per cent (84 & 83/1014) each for *skilled trades*, *technical and associate professional occupations* and *administrative and secretarial occupations*.

[20] Density has the additional merit of being a largely standardised measure that is less sensitive to fluctuating and uneven response rates across sectors.

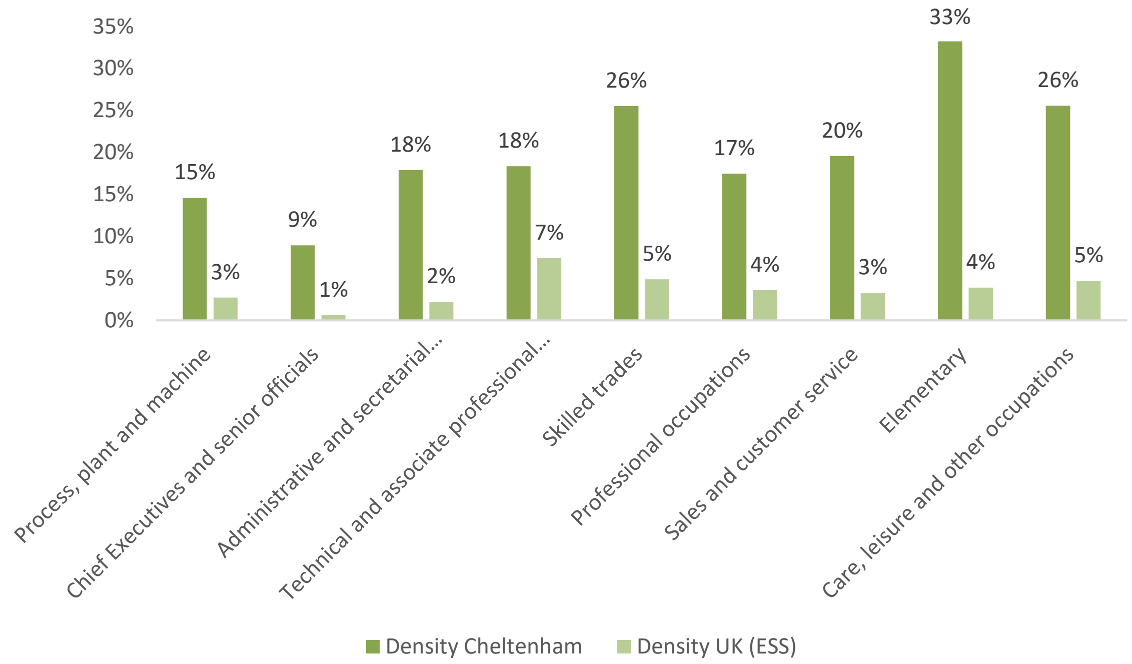
Figure 3.1: Proportion of vacancies in surveyed businesses in Cheltenham in the last 12 months by occupation compared to Gloucestershire and the UK



N=1014

Vacancy density can be calculated by dividing vacancies by the number of employees in each occupation at the organisation. This reveals that while *care, leisure and other occupations* makes up a high proportion of vacancies, the occupation also has a high density at 26 per cent of the employment in this occupation. Density of vacancies is also large in e*lementary occupations* at 33 per cent and *skilled trades* at 26 per cent as show in Figure 3.2.

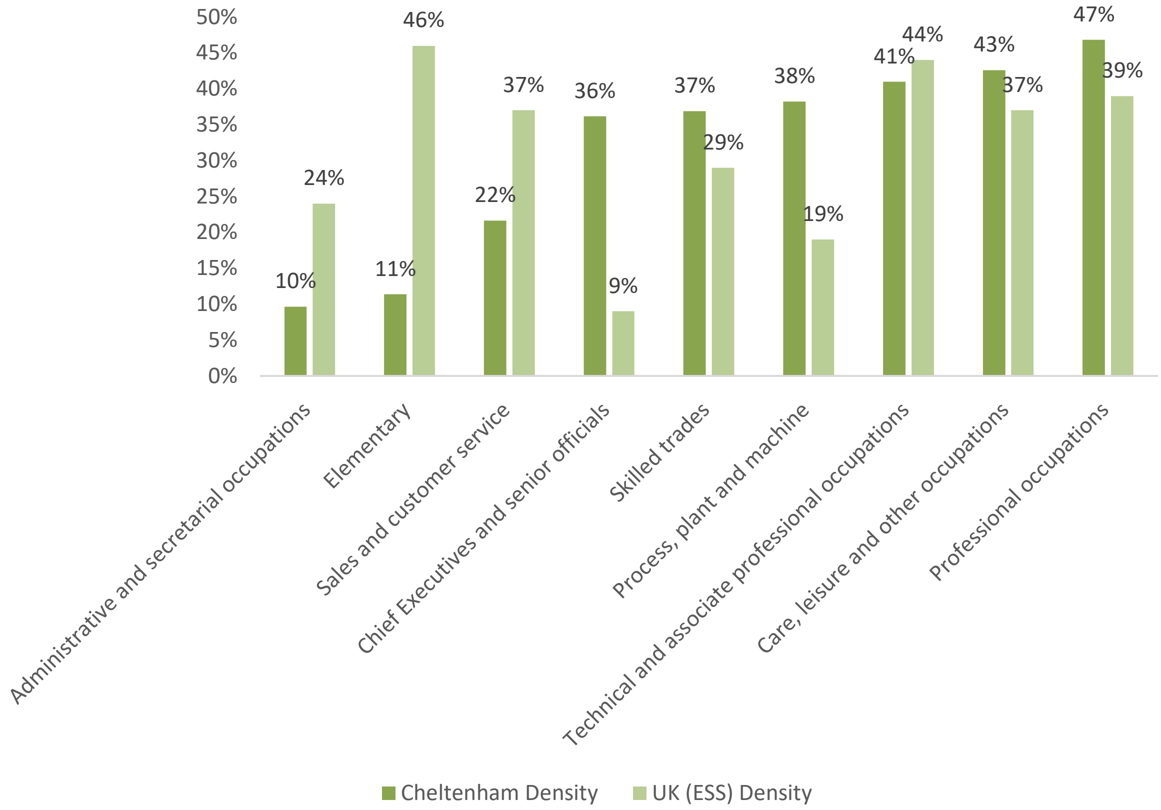
Figure 3.2: Density of vacancies in surveyed organisations in Cheltenham compared to UK



3.1.1 Hard to fill vacancies

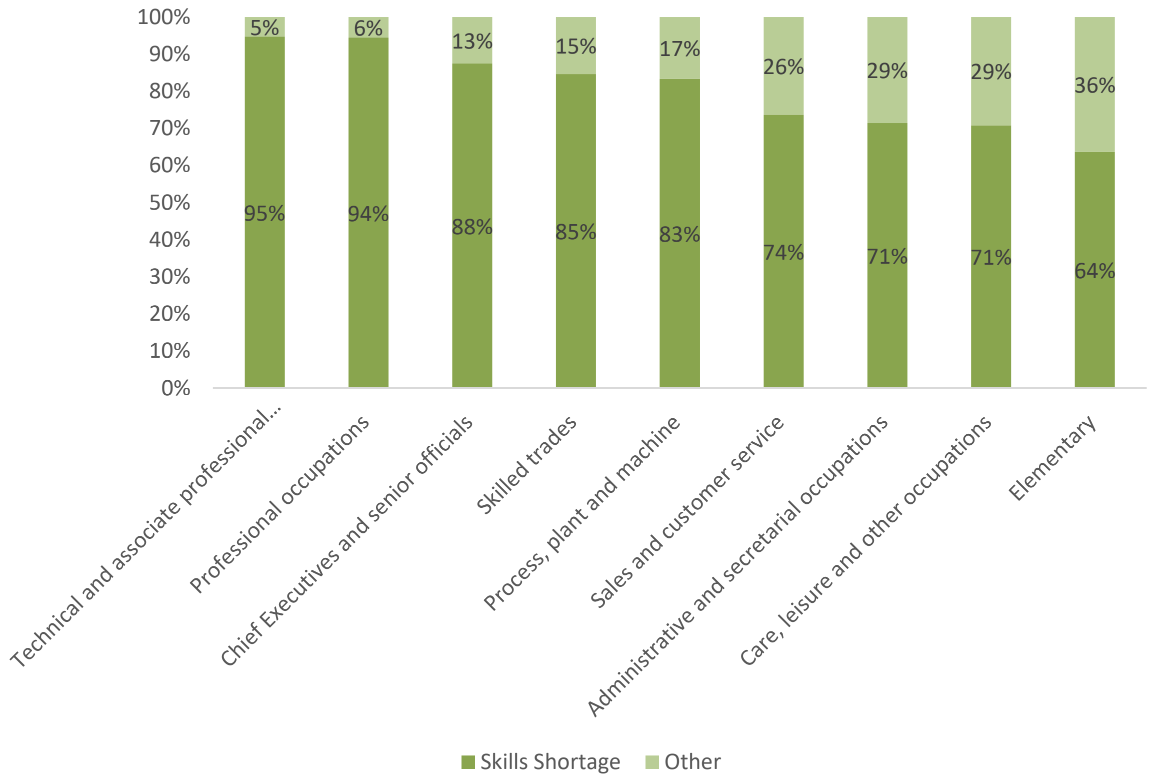
The employer survey asked the organisation how many of the vacancies they had given were hard to fill. The proportion of vacancies which were hard to fill are shown below in Figure 3.3 and reveal that *professional occupations* (47 per cent), *care, leisure and other occupations* (43 per cent), and *technical and associate professional occupations* (41 per cent) were some of the hardest to fill occupations. In some of the occupational areas, the proportion of hard to fill vacancies in Cheltenham were above the comparators for the UK from the Employer Skills Survey.

Figure 3.3: Density of hard to fill vacancies for Cheltenham and UK



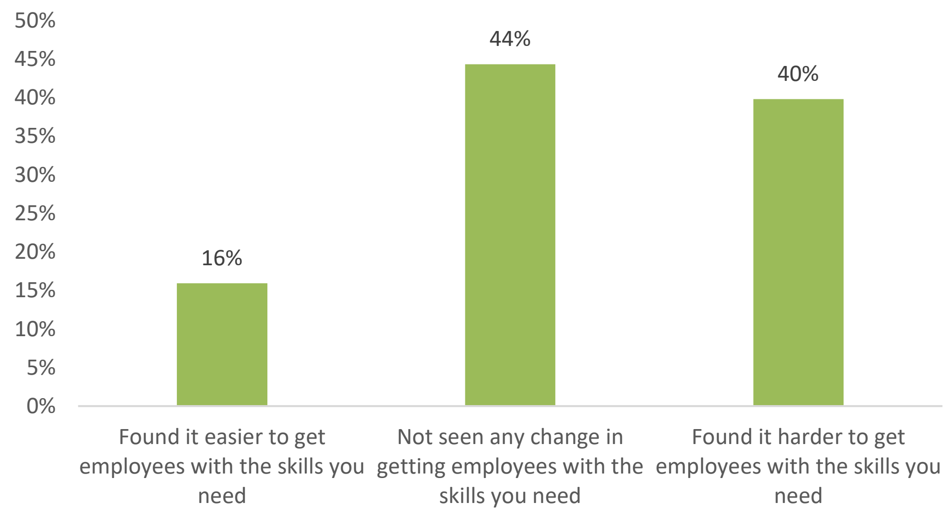
For the higher skilled occupations such as *technical and associate professional occupations* and *Skilled trades* the businesses suggested that the vast majority of vacancies were hard to fill because of skills shortages such as lack of qualifications, and lack of work experience among applicants as shown in Figure 3.4. Even in the lower skilled professions a skills shortage of some description was the given reason for the majority of hard to fill vacancies, though there was a higher proportion of other reasons such as competition and not enough people interested in the type of work offered. In 2017, the Employer Skills Survey found that 67 per cent of all hard to fill vacancies across the UK were due to skill shortages; in Gloucestershire, it was found that 78.3 per cent were classified as skill shortage. In Cheltenham the incidence of skill shortage vacancies was higher still at 81 per cent.

Figure 3.4: Reasons for hard to fill vacancies by occupation



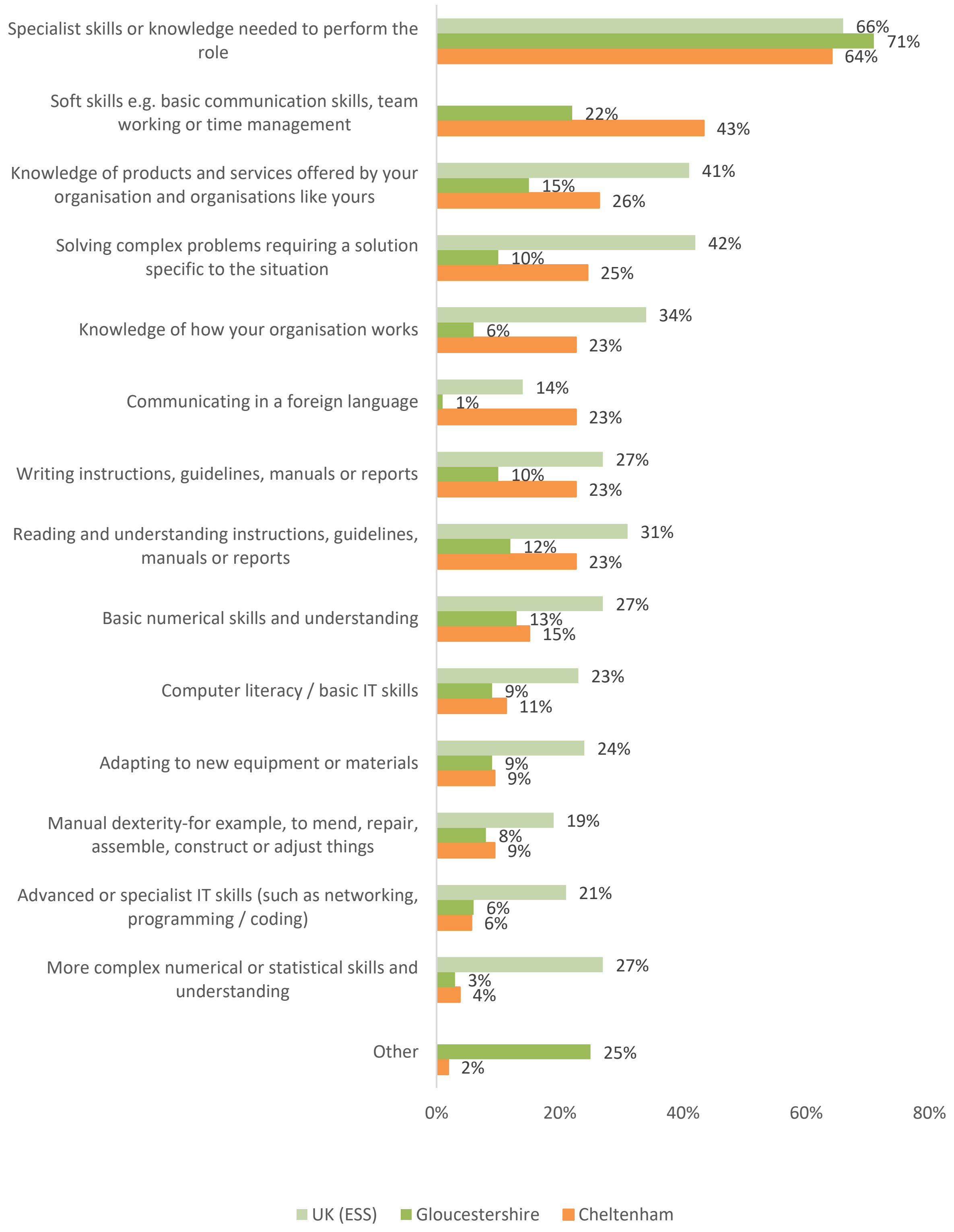
The businesses were asked how easy it was to find employees with the skills they needed in Cheltenham. For many (44 per cent, 39/88) said they had not seen any change in getting employees with the right skills since they moved or established the business in Cheltenham. However, a 40 per cent share (45/88) felt that it was harder to get employees with the skills they needed than it had been when the business opened in Cheltenham.

Figure 3.5: How easy has it been to recruit the right skills since the business has been based in Cheltenham?



The skills that were difficult to obtain were selected by the surveyed businesses revealing that specialist skills faced the largest shortage for organisations in Cheltenham, similar to the proportions found in the Gloucestershire Survey and Employer Skills Survey. Some forty-three per cent (23/53) of businesses also suggested that there were shortages in softer skills such as communication, which is far above the results found for Gloucestershire. Fifteen per cent (8/53) reported limitations in basic numerical skills, again similar to the Gloucestershire results but below the UK level from the Employer Skills Survey of 27 per cent. A further 11 per cent (6/53) of Cheltenham businesses had issues finding skills in computer literacy and 23 per cent (12/53) struggled to recruit people who could read and understand instructions.

Figure 3.6: What skills were difficult to obtain from vacancy applicants

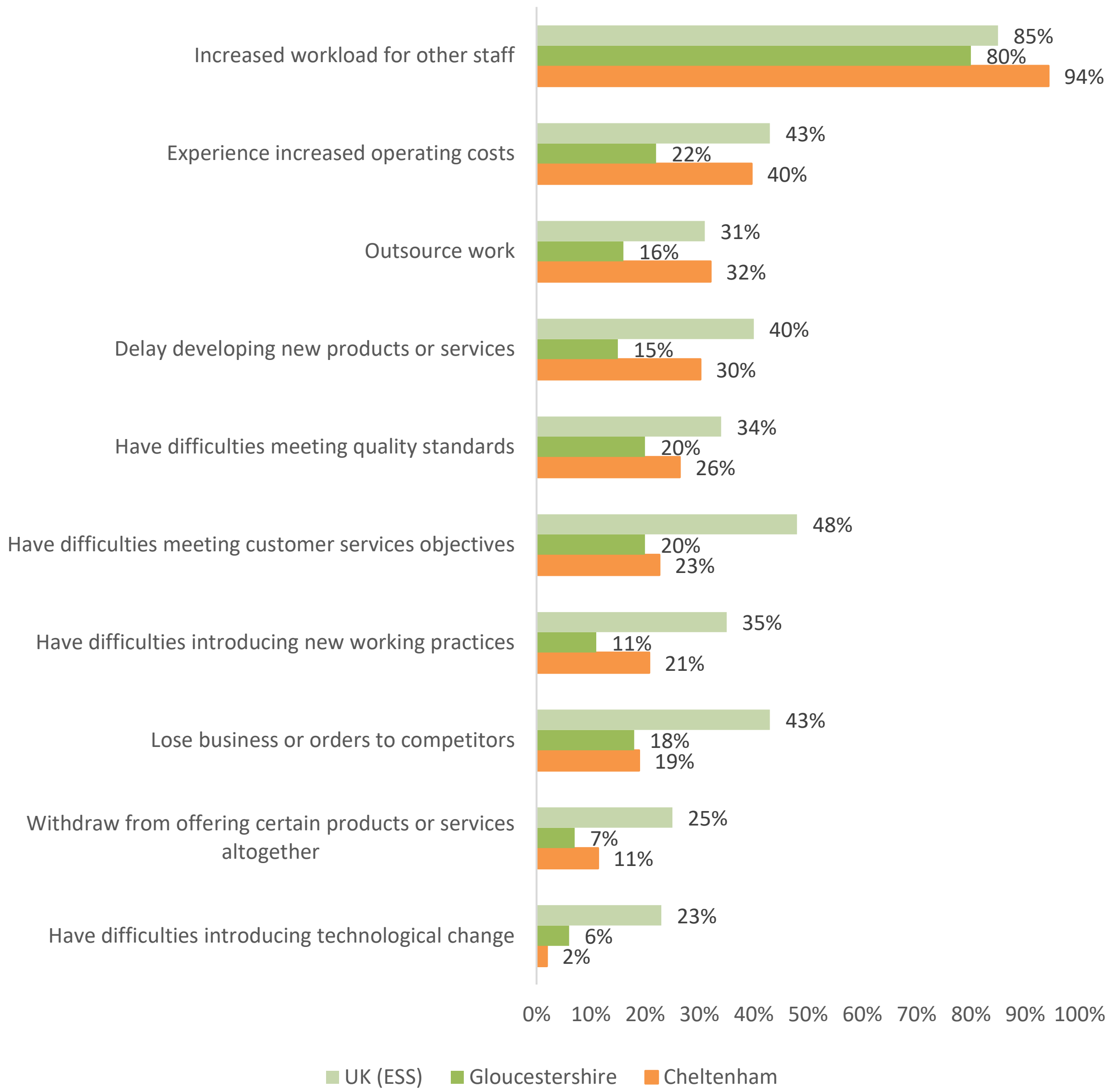


N=53

The size of the business did have an impact on the numbers of hard to fill vacancies with large employers (>250 employees) reporting 49 per cent of their vacancies were hard to fill compared to 65 per cent of SMEs (<250 employees) vacancies being hard to fill. A larger proportion of small and micro firms (1-49 employees) reported hard to fill vacancies again, at 75 per cent of all vacancies.

Results of the survey show that the effects of the hard to fill vacancies on businesses were varied, though the majority (94 per cent, 50/53) of respondent businesses said that it increased the workload of other staff. The other frequently reported impacts were increased operating costs (40 per cent, 21/53) and having to outsource work (32 per cent, 17/53). Many of these results are similar to the Employer Skills Survey and higher than the Gloucester Business Survey results.

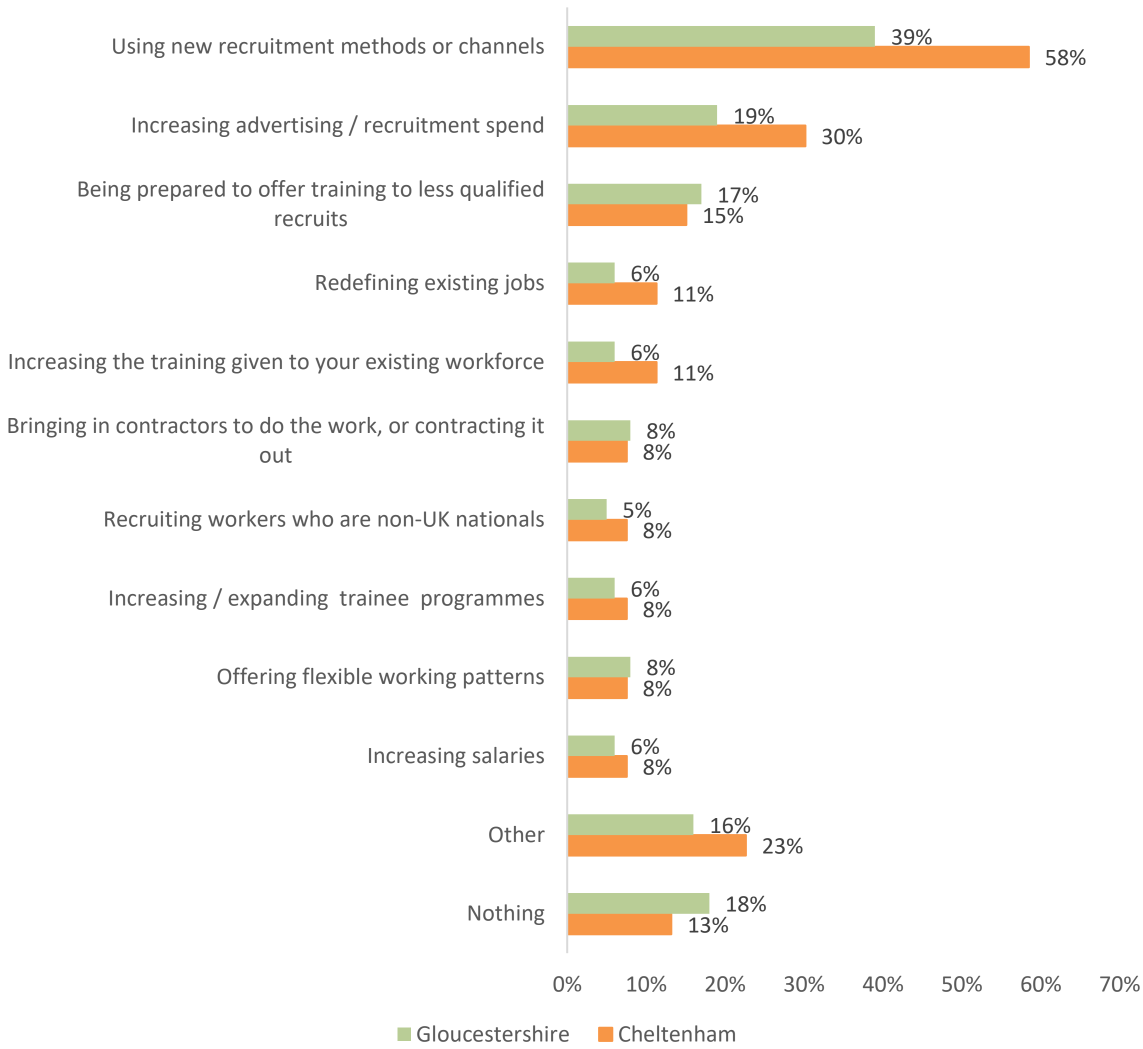
Figure 3.7: What is the impact of the hard to fill vacancies on the business?



N=53

In response to hard to fill vacancies surveyed businesses were taking a number of measures to overcome the recruitment difficulties. For many, they were looking to new recruitment methods and, in many cases, this involved a greater investment in recruitment spending. As highlighted in Figure 3.8 below, other businesses looked to bring in third party contractors to do the work for them (8 percent, 4/53). Thirteen per cent (7/53) of the businesses were doing nothing to overcome their difficulties in recruiting personnel for hard to fill roles while others were looking to train existing and new employees to fill any skills gaps.

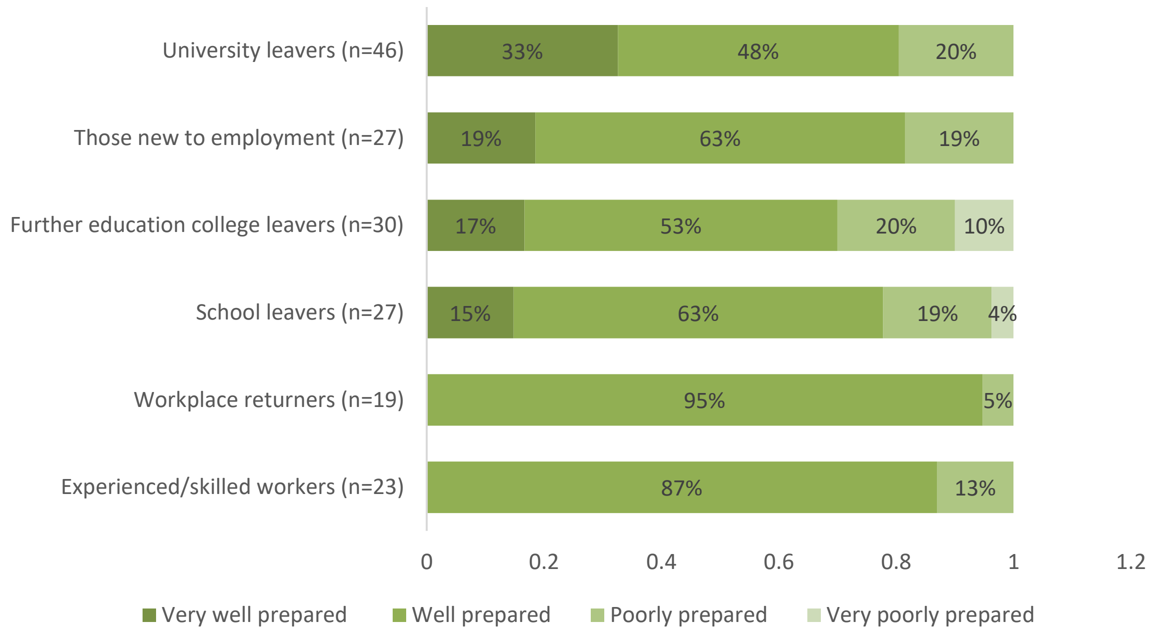
Figure 3.8: How is the business responding to the hard to fill vacancies?



N=53

Where recruitment did occur, businesses were asked how well prepared they felt the individuals had been for the roles. Those with workplace experience were exclusively well prepared for the role they were appointed for. Between 15 and 33 per cent of those new to employment and those who had come from education (either university, school or college) were poorly prepared for the work at the company.

Figure 3.9: How prepared were new recruits for work? Cross tabulated by background

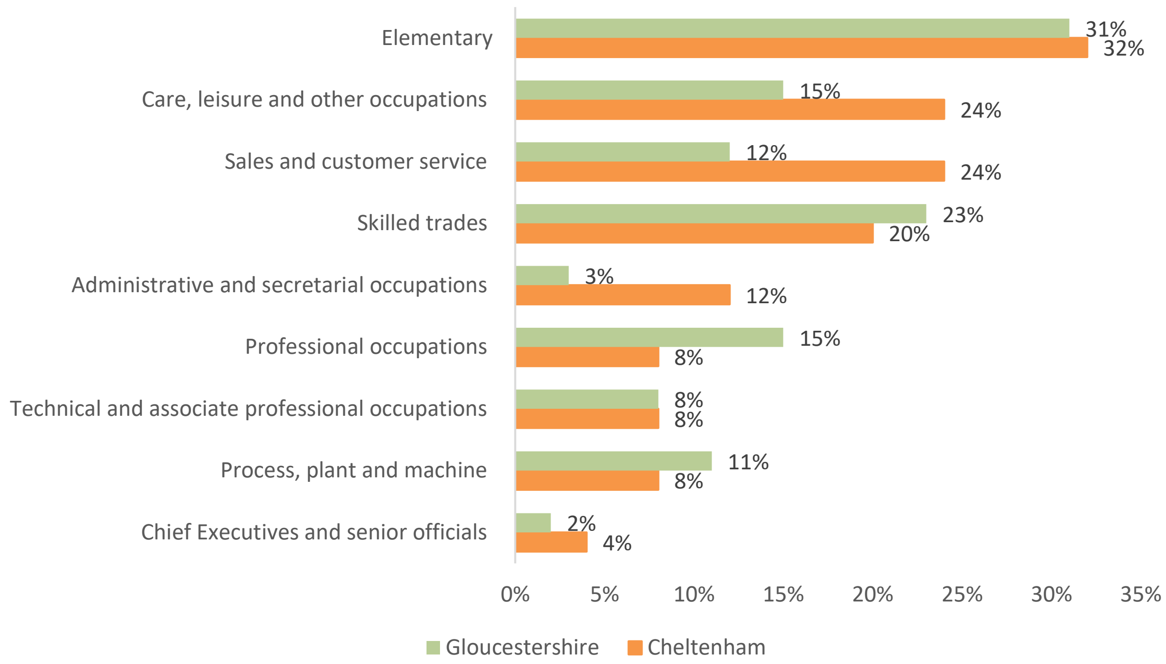


Though the numbers of respondents are small, the employers were asked what skills those recruited who were poorly prepared for the work required. Across all the backgrounds soft skills were given as an area the recruits were lacking, and it was suggested that some from university did not have specialist skills or knowledge nor the knowledge of how organisations worked.

3.2 Retention of staff

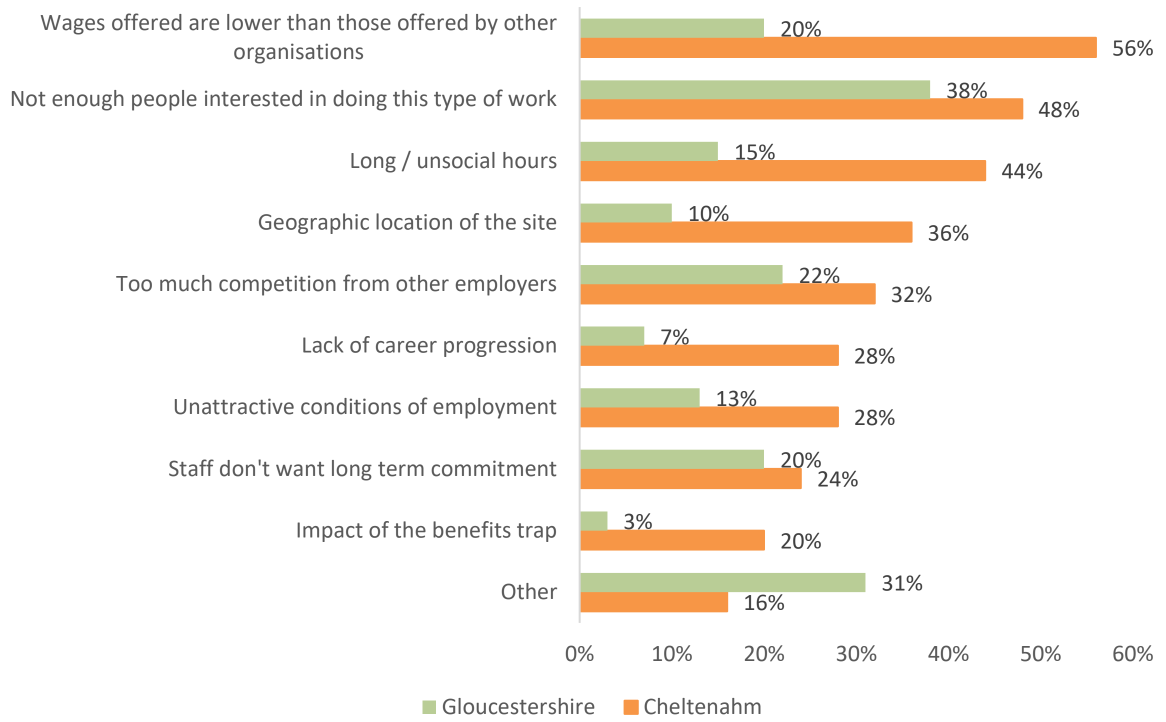
Retention of staff was an issue for 25 of the respondent businesses. The occupations it was reported difficult to retain staff were *elementary occupations*, *care, leisure and other occupations* and *sales and customer service*.

Figure 3.10: Are there particular jobs in which you have difficulties retaining staff? Broken down by occupation



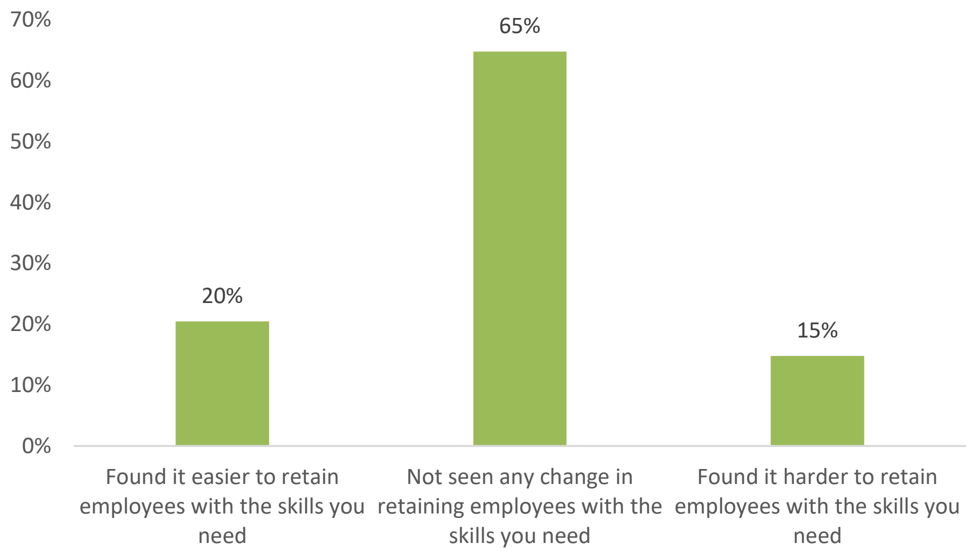
The employer's responses held low wages as the most frequent reason they could not retain staff while long hours and not enough people interested in doing the kind of work were other factors that were likely related.

Figure 3.11: Which of the following are the main reasons why it is difficult to retain staff?



Asked about retention of employees with the right skills, the majority (65 per cent, 57/88) of employers responded that the they had seen no change since the business had started or moved to Cheltenham as shown in Figure 3.12.

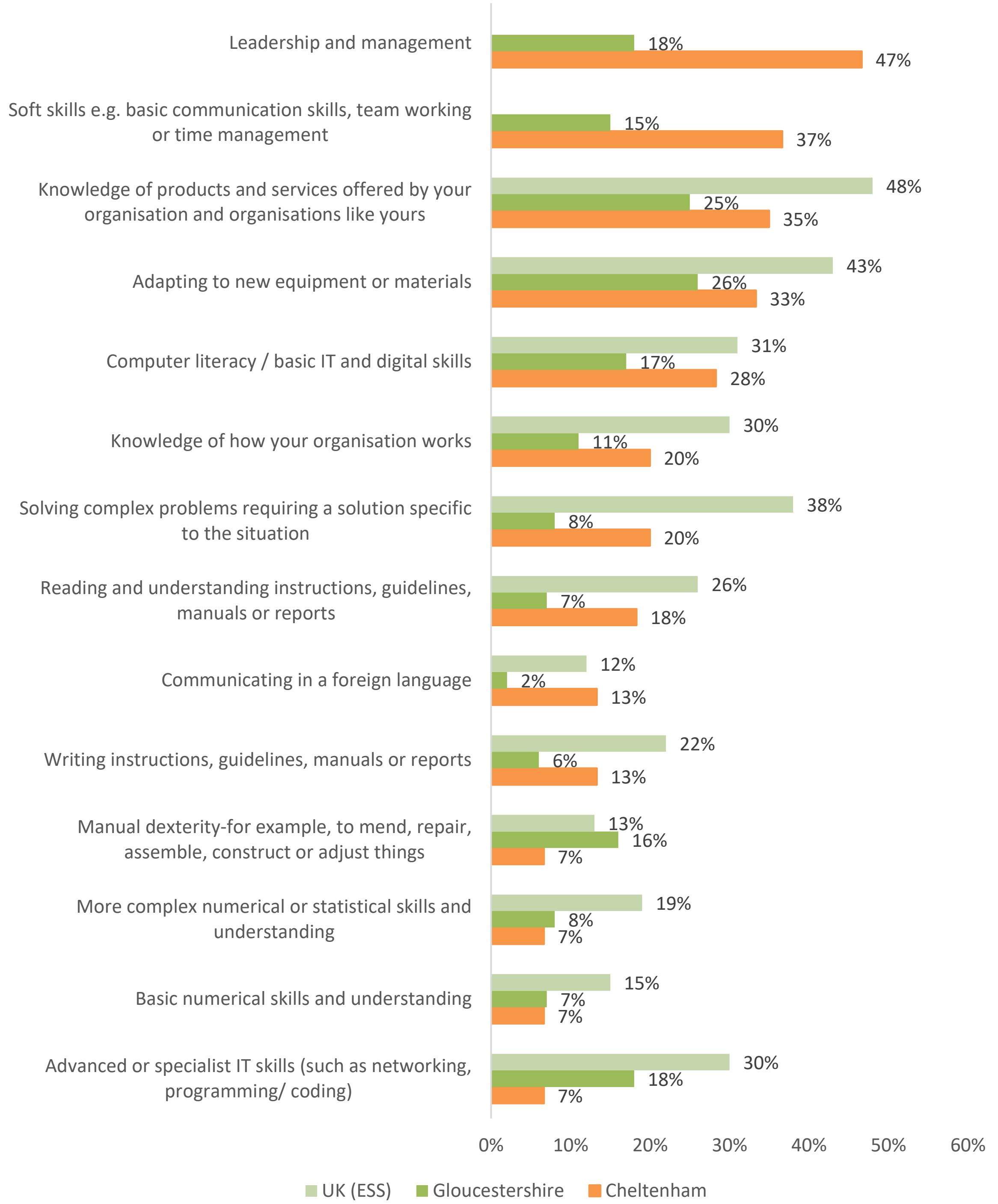
Figure 3.12: How easy has it been to retain employees with the right skills since the business has been based in Cheltenham?



3.3 Staff skills

The skills that needed improving at the company were varied reflecting the different sizes and sectors of the businesses surveyed. Leadership and management was the most frequently mentioned and again soft skills were reiterated as being something that employers would want to improve in their staff.

Figure 3.13: Which, if any, of the following skills do you feel needs improving? (multiple responses)



Many of the surveyed businesses invested in training for their staff and while this is certainly beneficial to the recipient employees, the survey results do not unpick who this training was targeting. Twenty per cent (12/53) of the surveyed businesses were looking to train their existing staff or offer training to less qualified recruits to overcome their hard to fill vacancies.

4 Opportunities of Living and Working in Cheltenham

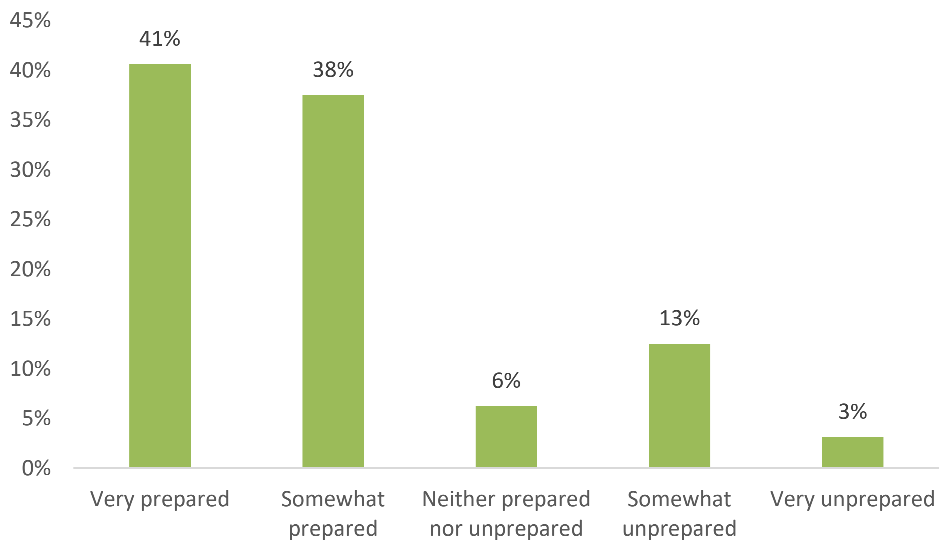
This section outlines the results of the employee survey on the barriers and opportunities of living and working in Cheltenham and is supported by results from the employer survey where appropriate.

4.1 Skills

4.1.1 Employee survey

While the employee survey did not capture those who had been recently recruited, and therefore comparison to the employer survey results does not necessarily reflect the skills shortages from the employer, employees tended to feel they were well prepared for their role, as shown in Figure 4.1. A similar proportion of employees considered themselves either very prepared or somewhat prepared for their role (78 percent, 25/32) as employers did for their recently hired recruits (81 percent, 139/172, see Subsection 3.1.1 above).

Figure 4.1: How prepared did you feel for your current employment?



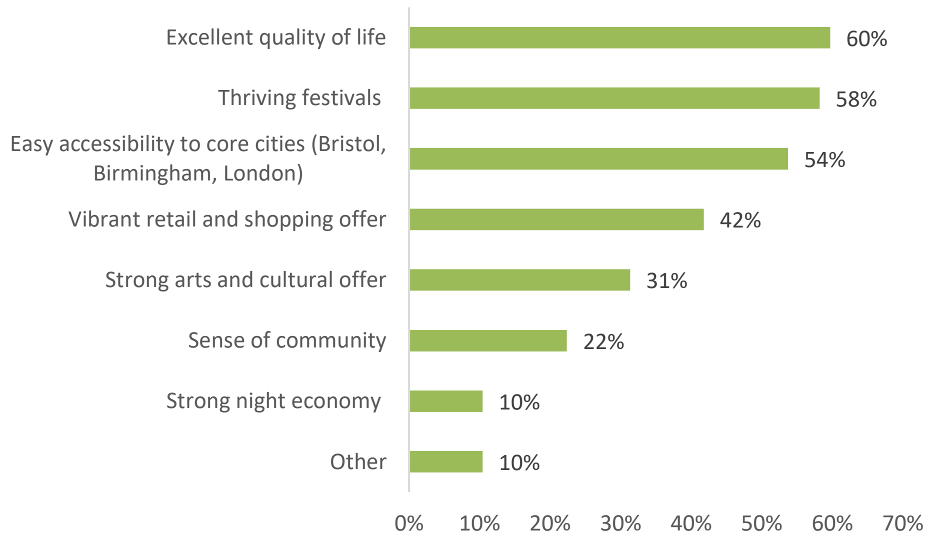
There is consistency between the contextual data presented in Section 1.2 and employee survey findings which show a large proportion of employees are highly qualified. Seventy-eight per cent of the employees surveyed had qualifications at level 4 compared to 50 per cent in the nationally available data.

4.2 Attractions to living and working in Cheltenham

4.2.1 Employee survey

Assessing the responses, the employee survey results revealed the attractions and opportunities for those living and working in Cheltenham (Figure 4.2). Cheltenham's location between Bristol and Birmingham, and good connection to London is a strength of the town and reflected in the thoughts of those who live and work there. Festivals, including the series of Cheltenham festivals in jazz, science, music and literature, The Gold Cup, and other major horse racing events, and cricket festivals are all part of the offer in Cheltenham which clearly has an impact on the opportunities for those living in the area. An excellent quality of life was the most frequently rated incentive for living in Cheltenham by those who are employed in the town.

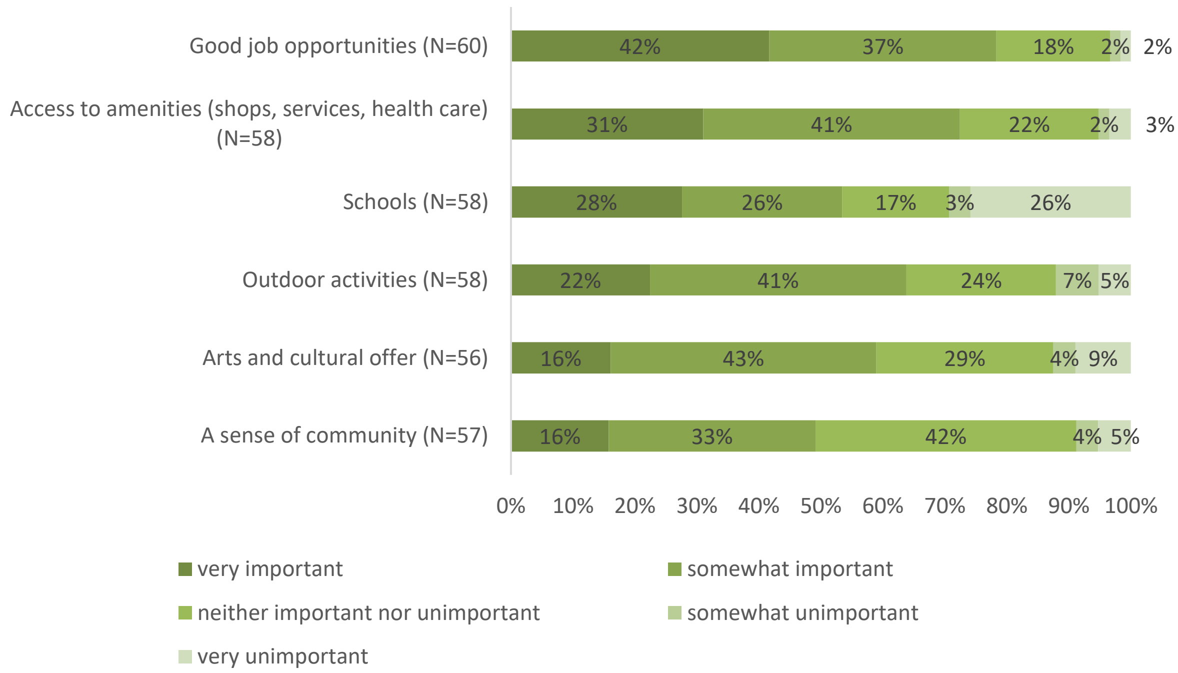
Figure 4.2: What are the key opportunities for employees living in the Cheltenham area? (multiple response)



N=67

For those who had relocated to Cheltenham from elsewhere in the country 42 per cent (25/60) of employees gave the good job opportunities as a very important factor, and a further 37 per cent (22/60) that it was somewhat important in their decision to move. Access to amenities was also highly ranked with 72 per cent (42/58) giving it as very or somewhat important. There was some emphasis on schools being a very or somewhat important consideration for 53 per cent (31/58) of respondents, although this was balanced by 26 per cent (15/58) of respondents who suggested it was very unimportant. However, none of those who gave schooling as unimportant had dependent children.

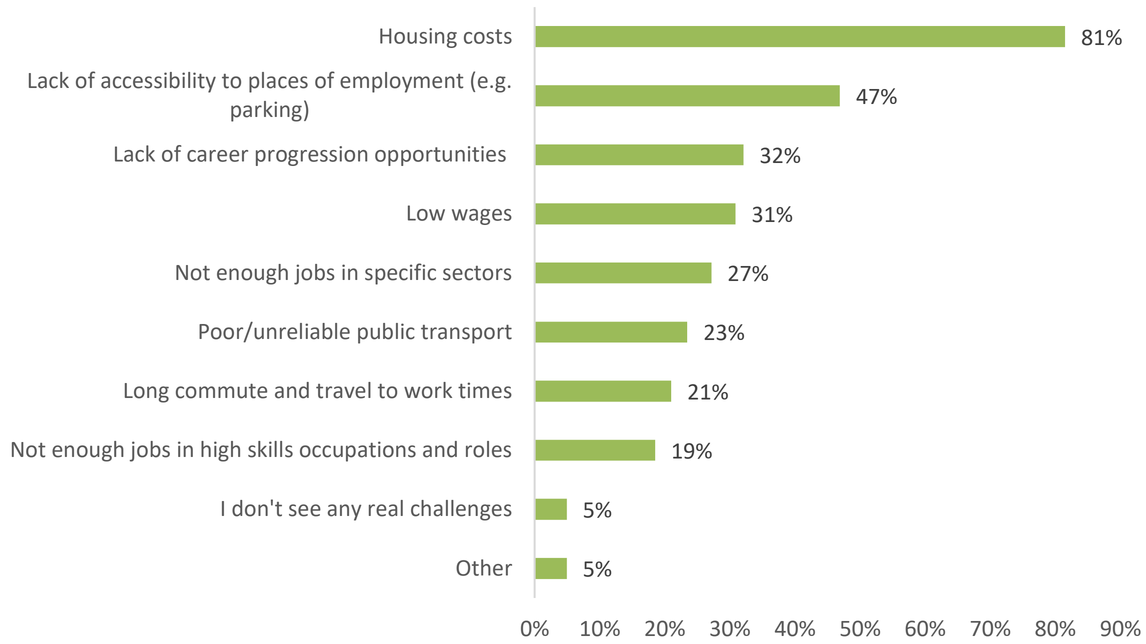
Figure 4.3: What were the important factors in deciding to move to Cheltenham?



4.3 Challenges to living and working in Cheltenham

Challenges of living in Cheltenham were identified by the employees through their survey responses. Most highly ranked was housing costs with 81 per cent (66/81) of respondent employees suggested that this was a key challenge they faced. Another barrier to working in the Cheltenham area was the lack of accessibility to places of employment while approximately a third of the respondents gave lack of career opportunities (26/81) and low wages (25/81) as challenges. Five per cent did not feel there were any challenges with living and working in Cheltenham.

Figure 4.4: What are the key challenges for employees living in the Cheltenham area? (multiple responses)

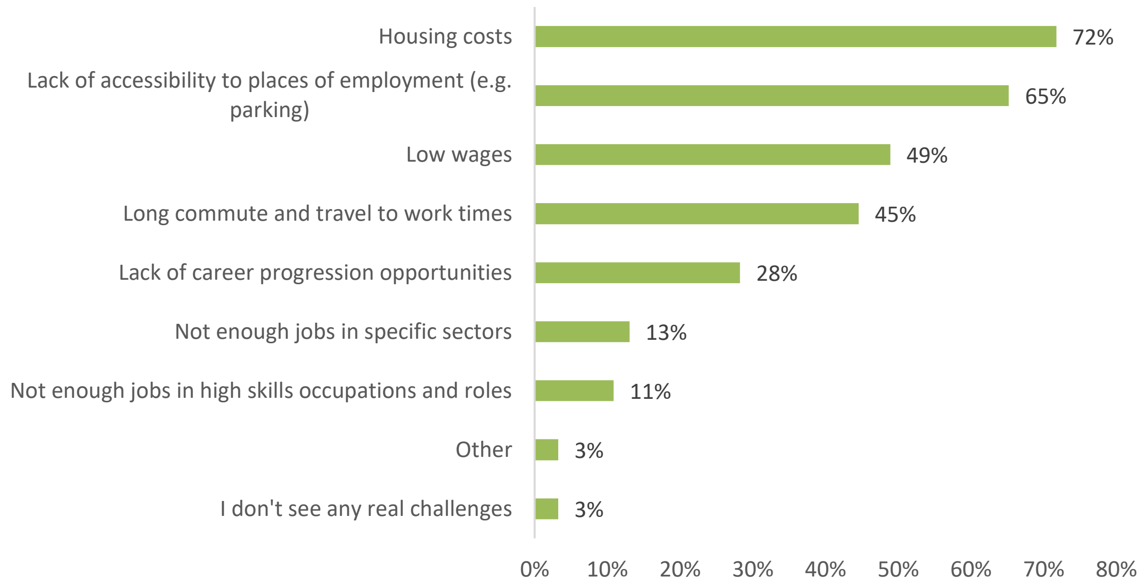


N=81

Triangulating these results with the employer of the employee allowed the study to investigate the factors that were affecting each and compare. For Employer one, housing costs were given as a key barrier to working in Cheltenham which was echoed by 84 per cent (16/19) of their staff. For Employer two, housing costs, lack of accessibility to places of employment and not enough jobs in specific sectors were all highlighted and this was echoed by their employees at 82 per cent (18/22), 55 per cent (12/22) and 41 per cent (9/22) respectively. Employer two did however highlight long commute times as a barrier which was only supported by 14 per cent (3/22) of their staff.

As these results indicate there was similar responses from the employers when asked what the key challenges to working or seeking employment in Cheltenham. Housing costs were identified by 72 per cent of employers as one of the biggest barriers facing their staff or those seeking jobs in the area (compared to 81 per cent of employees). Lack of access to places of employment was rated second as a barrier by both groups with a difference of 18 percentage points; 65 per cent of employers (60/92) and 47 per cent of employees listed this as a barrier.

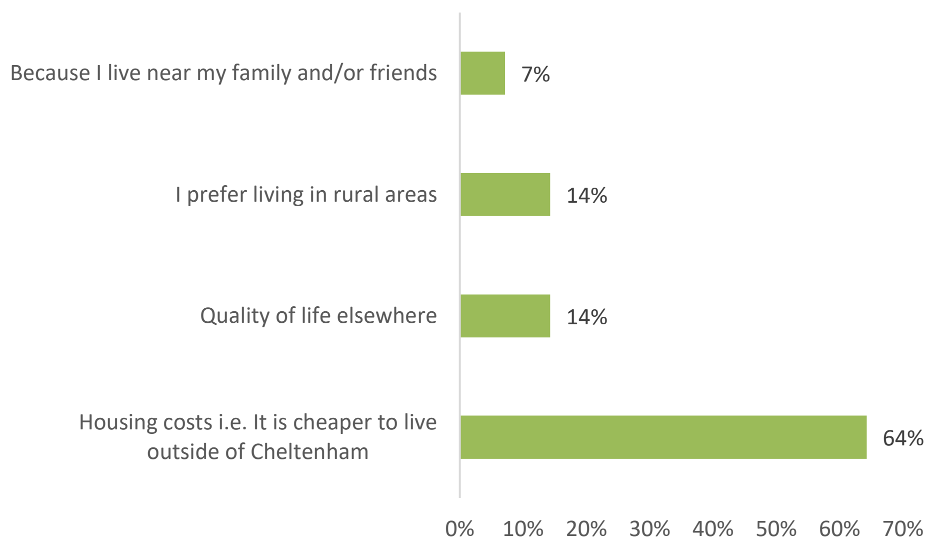
Figure 4.5: What are the key challenges for those working or seeking employment in Cheltenham? (multiple responses)



N=92

For those who did not live in Cheltenham the employee respondents were asked to give a reason why. Nine of the 14 respondents (64 per cent) suggested that high housing costs were the principle barrier for them as shown in Figure 4.6. This is a small sample however, and caution should be taken with these results.

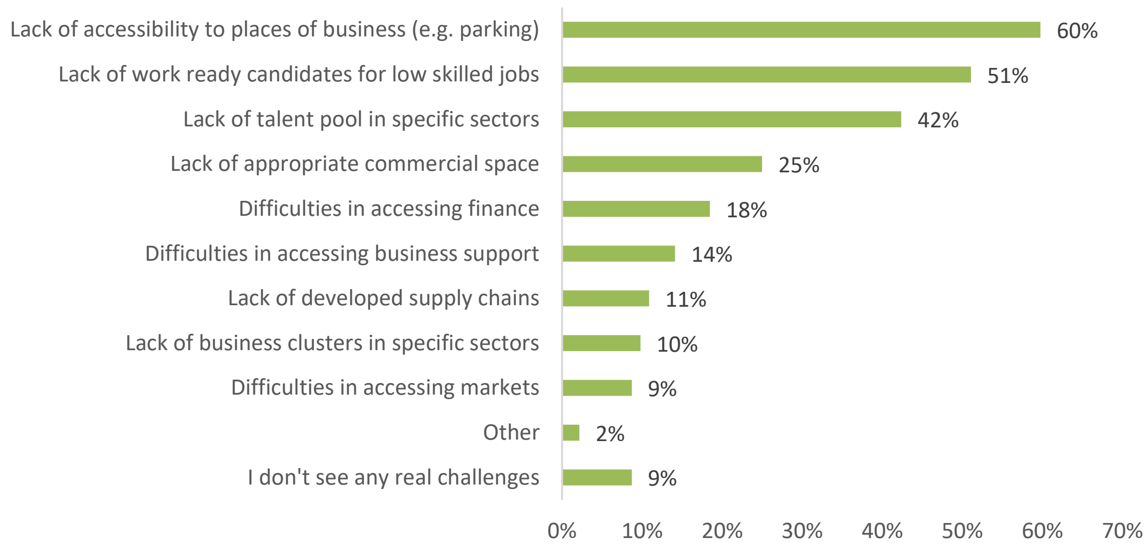
Figure 4.6: Employees reasons for not living in Cheltenham



N=14

Key barriers faced by employers doing business in Cheltenham were identified through a multiple selection list, reiterating and building on some of the findings highlighted in chapter 3. The most frequently mentioned barrier by 60 per cent of the businesses was the lack of accessibility to places of work such as parking and public transport. Over half of the businesses were challenged by the lack of work ready candidates for low skilled jobs with 42 per cent reporting a lack of talent in specific sectors.

Figure 4.7: Challenges faced by employers in doing business in Cheltenham



4.4 Brexit concerns

4.4.1 Employee survey

There were some widespread concerns voiced by employees regarding Brexit and 40 per cent (19/47) anticipated an impact on their jobs. When asked why, fifteen respondents provided qualitative results and these were coded to Table 4.1 below, though the low volume of respondents for each reduces the reliability of these results.

Table 4.1: Work based Brexit related concerns

Concern	N
Cost / ability to get hold of imported goods	3
Rules and laws	3
Customer / partner relationships	3
Uncertainty / market confidence	2
Reduced funding	2
Reduced sales / increased cost of service	2
Single market trade	2
Access to travel	2
Right to work in the EU	1
Worker's rights / benefits	1
Environmental concerns	1
Freedom to work internationally	1
Employment rights	1
Cost of exporting	1
Difficult to find good staff	1
EU tourism	1
Property market	1
Cost of living	1

4.4.2 Employer survey

Employers were asked what they expected would happen to the Cheltenham economy in the next 12 months. Of those who provided a response, 8/19 who expected it to deteriorate, 15/33 who said it would stay the same and 6/9 who weren't sure, mentioned Brexit in their responses. Where a respondent said they expected the Cheltenham economy to deteriorate, Brexit related responses included:

> *'I don't think Brexit is going to help the exporting businesses and manufacturers around here.'*

> *'I think the uncertainty around Brexit will affect a number of sectors and if it does happen will impact negatively on the local economy and jobs.'*

> *'Brexit will have a big impact on the local economy especially tourism.'*

Where respondents thought the local Cheltenham economy would stay the same in the next 12 months it was mostly felt Brexit was not going to impact the local economy:

> *'There is a lot of uncertainty with Brexit, but I think the Cheltenham economy is quite stable and shouldn't decline.'*

> *'I expect Brexit to have an economic impact especially in the next few months but after that I think the Cheltenham economy will bounce back.'*

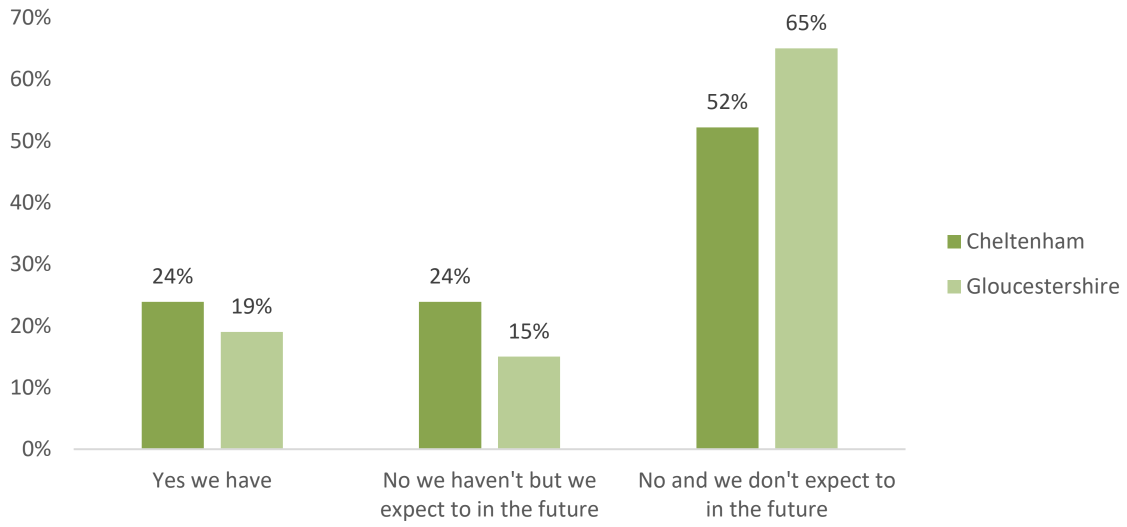
For those who didn't know or have an expectation for what the Cheltenham economy would be like in 12 months, Brexit was mentioned as being a key factor in that uncertainty:

> *'Don't know as it will depend on what will happen with Brexit.'*

> *'It is difficult to judge what will happen in the local area until there is more certainty about what is going to happen with Brexit.'*

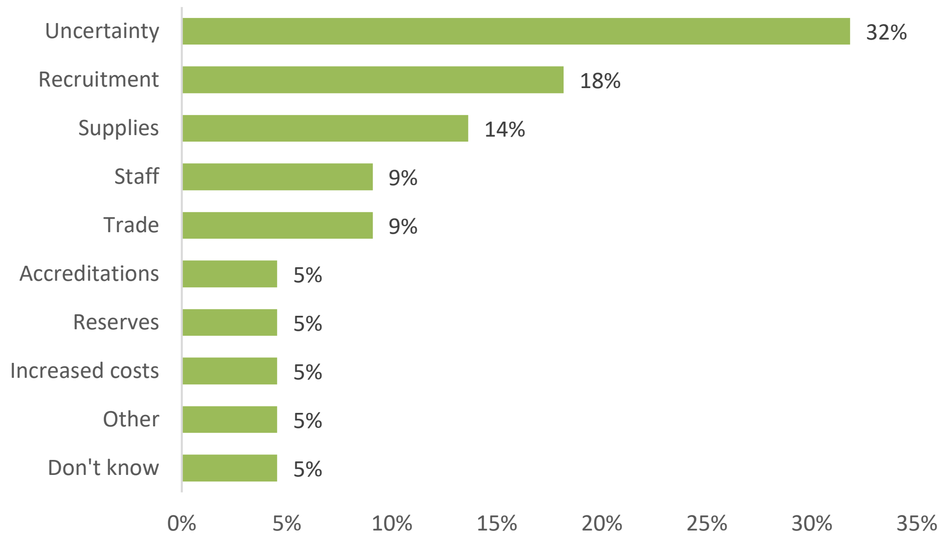
Asked if they had noticed, or expected, any impact on their business following the decision to leave the EU approximately a quarter of businesses each said they had, or they expected to in the future. The remaining 52 per cent (48/92) stated that they have not felt any effect and did not expect to in the future. This differs from the responses to the same question in the Gloucestershire Business Survey where 65 per cent expected no impact from Brexit.

Figure 4.8: Have you noticed, or do you expect, any impact on your business from the UK's decision to leave the EU?



The 22 businesses who stated that the decision to leave the EU had had an impact on them were asked what this impact had been. The qualitative responses were coded and show that uncertainty has been the biggest impact on their business (32 per cent, 7/22) which is leading to lack of investment, contingency stockpiling and uncertainty in the value of the pound. Other issues that businesses in Cheltenham have faced as a consequence of the decision to leave the EU have been on existing staff and recruitment. Eighteen per cent (4/22) of businesses reported issues with recruitment citing a drop in the number of EU citizens applying for jobs. A further few of the businesses (9 per cent) stated that existing EU staff they employed have left the country.

Figure 4.9: Reported impacts of the decision to leave the EU on Cheltenham businesses



One business summarised the impact on recruitment succinctly:

> *'We're not getting as many applicants as we previously did from the EU countries. We rely quite heavily on those so it's taking longer to find the right candidates because we don't get as many applications. I think a lot of EU countries put a lot of emphasis on hospitality being a career choice whereas in the UK, we see at is being a stop gap.'*

Of those who expected to see impact of the decision of the UK to leave the EU on their business, the reported outcomes were focussed on supply chain impacts (36 per cent, 8/22), recruitment difficulties (23 per cent, 5/22) and reduced demand and spending which would impact business trade (18 per cent, 4/22).

4.5 Transport

4.5.1 Public transport

Public transport was identified as a challenge by 23 per cent (19/81) of the employees surveyed while 21 per cent (17/81) said that there were long commutes to get to work, see Figure 4.4 in section 4.2 above. These results suggest that there are some challenges with transport in Cheltenham which acts as a barrier on working and coming to the town, as well as accessibility of any employment opportunities. Qualitative responses were gathered and provide some more detail on the reasons transport is an issue for some of those surveyed.

For town residents the issues with public transport that affected their work related to the congestion and cost:

> *'Buses make the promenade a very unpleasant and crowded place to walk; can't cross easily and queuing bus passengers continually block the pavement making it difficult to browse the shops easily or pleasantly. More cycle lanes please.'*

> *'If buses were cheaper and more frequent during rush hour, more people would use them.'*

> *'Needs to be more affordable public transport for workers in central Cheltenham. Cost of parking on a daily basis is extortionate.'*

The issue of frequency and availability of public transport was raised by several respondents who travel into Cheltenham from outside the town:

> *'The first train from Cam and Dursley gets to Cheltenham too late for the start of the working day.'*

> *'I used to get an early bus from Woodmancote at 7.02, but this was cut as it was not used enough.'*

The issue with cut services was echoed by another respondent who drives to work instead of using public transport:

> *'I have no choice other than travelling in by car as the bus services have been pared to the bone. Whilst the drive is quite easy, parking for work is a nightmare; I am currently paying £100 a month and I only work part-time.'*

Besides increasing the frequency and availability of public transport around and to Cheltenham, other suggestions with respect to improving this challenge of working in Cheltenham were given by some of the respondents:

> *'A Park and Ride somewhere between the exit from M5 J10 and Tewkesbury Road would be wonderful and judging by all the other traffic using that route in the morning, well-used, relieving congestion in the town.'* [sic]

> *'Encouraging people into Cheltenham in the evening, put off by car parking fees in evening.'*

> *'The zebra crossing just off the [High Street] roundabout always causes issues too. Can this not be moved down slightly to alleviate?'*

These suggestions from employees may help to improve the ability for those working in Cheltenham to access their place of employment and making it a more attractive place to work.

4.5.2 Cycling to work

As part of the same set of issues and barriers with regard to working in Cheltenham, cycling was identified by 13 respondents in their qualitative responses regarding the transport challenges that they face. A lack of cycle lanes and pedestrian routes was mentioned in these responses; resolving this by providing more cycling infrastructure may help to alleviate this problem:

> *'It's simply appalling that we don't have good cycle lanes on the main routes into Cheltenham and around the centre. We've installed showers and cycle parking at the office, but staff are reluctant to risk cycling in rush hour. New developments on the outskirts are built with zero thought to cycle commuting.'*

> *'I would cycle if there were better cycle paths or the edges of the roads were less pot-holed.'*

5 Conclusions

Cheltenham has many attractions and opportunities for living, working and running a business. There is a highly skilled labour force upon which employers can draw, as well as good connections to major cities and the rest of the UK, and employee survey respondents most frequently rated the excellent quality of life that is on offer. Many employees not from Cheltenham highlighted the good job opportunities as being important to their decision to relocate there (79 per cent); furthermore, for those with dependent children the schooling offer was an important consideration. Employment in the area is well remunerated, with ONS data revealing that the average salary in Cheltenham is £29,625, which is above the national average.

Besides these advantages, employers and employees in Cheltenham faces some issues. The average house price in Cheltenham is high (£255,000) and this challenge was the highest rated by both employers and employees living in the area. For 64 per cent of those employees who lived outside of Cheltenham, housing costs were the principal reason for not living in the town. Home ownership among the employee survey respondents is at 58 per cent, making these individuals likely to be affected by the house prices. Driving the rising house prices is a demand for living in Cheltenham, as demonstrated by the responses from the employee survey which reveal that 53 per cent lived elsewhere before moving to Cheltenham.

Transport was identified as a challenge by 23 per cent of the surveyed employees, and others highlighted the commute times as a barrier to working in Cheltenham. More frequent and cheaper public transport and better cycle access were identified as potential solutions which might help to alleviate the issue. In the context of cuts to services these may be difficult to implement, but initiating infrastructural changes to the centre may help to improve access.

The majority of the businesses (87 per cent) had had a vacancy in the last 12 months, with the largest share being in *Care, leisure and other occupations*; this represented 26 per cent of the employees at the surveyed companies indicative of a high churn rate. This may be expected of jobs in this occupational area but is compounded because many of the same vacancy occupations are reported as being hard to fill. The high cost of living in Cheltenham and the relatively low pay of *Care, leisure and other occupations* may mean that the skills required are not available locally as it is unaffordable to do so, and rising house prices may be forcing those on lower wages who reside in Cheltenham to relocate, whereby generating the high vacancy density.

The proportion of hard-to-fill vacancies was higher in Cheltenham than reported in the UK in the Employer Skills Survey for *Care, leisure and other occupations* and *Professional occupations*. Given that some of the hard-to-fill vacancies are in lower-skilled occupations such as Care and Sales and there is a highly qualified population in Cheltenham (as suggested by both survey results of the employees and ONS data), it may be that there is a mismatch between low-skilled vacancies and the labour market. This would reinforce that there are other barriers, such as the cost of living, to working in Cheltenham that preclude a fluid labour market from operating and attracting those with the right skills to the appropriate available jobs. The lack of public transport and other transport issues also increase the cost of working in Cheltenham and reduce the ability to commute and the accessibility to any employment opportunities.

Further evidence of the churn of staff in lower-skilled occupations was found in the low retention of staff among many of the businesses in areas such as Care and Elementary occupations. Difficulties in retaining staff in Cheltenham were, however, similar to those reported in Gloucestershire across different occupation groups, although *Care, leisure and other occupations* and *Sales occupations* were notably more difficult to retain in Cheltenham. Fifty-six per cent of employers suggested that the reason as to why they could not retain staff was that wages offered were lower than in other organisations. Competition over wages, especially in an area in which the cost of living is high, may act as a barrier to recruitment for those who are unable to offer higher amounts, particularly smaller enterprises.

Other than *Care, leisure and other occupations*, *Professional occupations* and *Technical and associate professional occupations* had high hard-to-fill vacancy rates. These latter two occupation categories have a higher proportion of higher-skilled individuals, and a lack of available skilled labour in the market may reflect the low unemployment and the skills shortages reported among the applicants.

The skills that businesses felt were often lacking among the applicants whom they received, and where they would like to improve their existing staff, were fundamental skills such as basic numerical skills and being able to read and understand instructions. These skills shortages were often below the levels reported in the national Employer Skills Survey, albeit higher than in the Gloucestershire Business Survey. For some of the skills shortages, addressing these limitations in the labour market in Cheltenham would help to support businesses in filling their hard-to-fill vacancies. In many cases the vacancies are in lower-skilled occupations such as Sales, Elementary and Care and Leisure, where the density of vacancies stood at 20 per cent, 33 per cent and 26 per cent, respectively. In these instances, the high qualification levels demonstrated by the surveyed employees do not necessarily reflect the requirements of a lower-skilled role.

Given that a larger proportion of businesses reporting hard-to-fill vacancies were small and micro enterprises, any support would be helping smaller businesses (as well as poorly skilled residents) who face additional costs to recruit for the vacancy or spend additional resources in order to cover the vacant role through another means. Such restrictions on smaller businesses are likely to limit their growth and development.

In other areas the skills most in need comprised specialist skills facilitating particular business needs such as knowledge of the organisation/industry and products. This is synonymous with the results of the Employer Skills Survey and, to a lesser extent, the Gloucestershire Business Survey. It may be that many of these vacancies are receiving little private investment; therefore, there is a failure to improve the local labour market. As these skills are particular to each business, the promotion or facilitation of training schemes and approaches to recruitment such as apprenticeships may support both the businesses and the labour market in overcoming these issues.

Brexit was a concern highlighted by both the employers and the employees, though responses from this latter group focused on issues pertaining to their employment. Uncertainty generated by Brexit was widely cited, though perceived impacts on the local Cheltenham economy were mixed. Some employers thought that the impact of Brexit on tourism and exporting businesses might be damaging to the local economy, while others considered the resilience and stability of Cheltenham, suggesting that any Brexit effects would be limited. When asked if their business had been impacted upon by Brexit thus far, 24 per cent responded that it had and a further 24 per cent thought that it had not impacted upon them as of yet but that they would be affected in the future. With the remaining 52 per cent thinking that they will not be affected by Brexit, this confirms the diaspora of qualitative views on the issue. This was below the comparison with Gloucestershire, who reported that 65 per cent had not been affected by Brexit and did not expect to be in the future.

Despite these issues, business confidence was high, with 45 per cent of respondents expecting to increase their turnover in the next 12 months, figures that mirrored results in the Gloucestershire Business Survey and were above those in the Small Business Survey. For 78 per cent this was driven by growth in existing markets, though 24 per cent stated that this was due to new markets. Cheltenham's challenges are therefore mixed and in many aspects are caused by its success. While business and the labour market have improved over the last decade, house prices and the burden on public transport infrastructure are areas which have been identified as key challenges.

Appendix 1

Employer Survey

Cheltenham Borough Council Survey 2019

Thank you for taking the time to complete this valuable survey!

There is consistent feedback from employers that they often find it hard to find employees with the skills they need or to retain employees in the Cheltenham areas. In order to make sure that we continue to understand and respond to the skills needs of businesses like yours, we rely on the information that you provide us through this survey to shape the strategy of the CBC in developing and supporting the local labour market and retaining the skills and talent our economy needs and deserves.

Any comments that you make will be confidential and the information you provide will only be used for the purposes of this evaluation. Comments that you make will not be attributed to you unless we have your explicit permission to do that.

Please note: if you would like further information regarding this project, how your data will be used and your rights under data protection laws please go to:
http://www.wavehill.com/cheltenham-privacy-notice

Q2.1 Please can I confirm the following information

- ◯ Business name ____

Q2.1a Please can I confirm your postcode?

____

Q2.2 What is your job role?

____

Q2.3 Firmographics

Q2.4 First can we just check, is this establishment...

- ◯ The only establishment in the organisation?
- ◯ One of a number of establishments within a larger organisation?

Q2.5 Do you have other sites in Cheltenham?

- ◯ Yes
- ◯ No

Q2.6 Approximately how many people work in your organisation across Cheltenham?

- Under 10
- 10 to 49
- 50 to 249
- 250 to 999
- 1000+

Q2.7 Approximately how many people work in your organisation across the UK as a whole **excluding** **Cheltenham**?

(including full-time and part-time employees on your payroll, as well as any working proprietors or owners, but excluding the self-employed and outside contractors or agency)

- None outside of Cheltenham
- Under 10
- 10 to 49
- 50 to 249
- 250 to 999
- 1000+
- Don't know

Q2.8 Is this site the Head Office of the organisation?

- Yes
- No
- Don't know

Q2.9 Are the headquarters of your organisation based in the UK?

- Yes
- No
- Don't know

Q2.10 Please specify where your headquarters are located

____

Q2.11 How many people work at this specific site?
(including full-time and part-time employees on your payroll, as well as any working proprietors or owners, but excluding the self-employed and outside contractors or agency)

Interviewer: if they are unable to give you an exact figure please ask them to chose from the bandings below.

Q2.12 How many people work at this specific site?
(including full-time and part-time employees on your payroll, as well as any working proprietors or owners, but excluding the self-employed and outside contractors or agency)

- ○ 1
- ○ 2 to 4
- ○ 5 to 9
- ○ 10 to 24
- ○ 25 to 49
- ○ 50 to 99
- ○ 100 to 249
- ○ 250 or more

Q2.13 The next question is to understand approximately how many of your staff are employed different occupation categories.

Would you prefer to answer as either a percentage of total staff or a raw number? (Interviewer: we would prefer number figure)

- ○ Answer as Number
- ○ Answer as Percentage
- ○ Don't know

Q2.14 Approximately how many of your staff are employed in the following occupation categories?

	Number
Group 9: Elementary (e.g. general, warehouse, and agricultural workers)	
Group 8: Process, plant and machine (e.g. machine operatives, assemblers, forklift truck, train and coach drivers)	

Group 7: Sales and customer service (e.g. sales assistants, customer service)	
Group 6: Care, Leisure and other occupations (e.g. nursery workers, veterinary nurses, hairdressers and caretakers)	
Group 5: Skilled trades (e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers)	
Group 4: Administrative and secretarial occupations (e.g. book-keepers, library assistants, and office workers)	
Group 3: Technical and associate professional occupations (e.g. engineering technicians, IT support and taxation experts)	
Group 2: Professional occupations (e.g. scientists, architects, IT specialists, medical practitioners, solicitors and journalists)	
Group 1: Chief Executives and senior officials (e.g. division directors, production managers and practice managers)	

Q2.15 Approximately how many of your staff are employed in the following occupation categories?

Group 9: Elementary (e.g. general, warehouse, and agricultural workers) : _______
Group 8: Process, plant and machine (e.g. machine operatives, assemblers, forklift truck, train and coach drivers) : _______
Group 7: Sales and customer service (e.g. sales assistants, customer service) : _______
Group 6: Care, Leisure and other occupations (e.g. nursery workers, veterinary nurses, hairdressers and caretakers) : _______
Group 5: Skilled trades (e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers) : _______
Group 4: Administrative and secretarial occupations (e.g. book-keepers, library assistants, and office workers) : _______
Group 3: Technical and associate professional occupations (e.g. engineering technicians, IT support and taxation experts) : _______
Group 2: Professional occupations (e.g. scientists, architects, IT specialists, medical practitioners, solicitors and journalists) : _______
Group 1: Chief Executives and senior officials (e.g. division directors, production managers and practice managers) : _______
Total : ________

Q2.16 The next question will ask you about how many of your staff fall into different age bands Would you prefer to answer as either percentage of total staff or a raw number? (Interviewer: we would prefer number figure)

- ◯ Answer as Number
- ◯ Answer as Percentage
- ◯ Don't know

Q2.17 Thinking about your age profile of your business, approximately how many of your staff fall into the following age bands?

	Number
16 to 17	
18 to 24	
25 to 49	

50+	

Q2.18 Thinking about your age profile of your business, approximately how many of your staff fall into the following age bands?
16 to 17 : _______
18 to 24 : _______
25-49 : _______
50+ : _______
Total : ________

Q2.19 Approximately how many of your staff do you expect to retire in the next three years?
____

Q2.20 Which sector would you say your business operates in? (all that apply)

- ☐ Cyber
- ☐ Public Administration
- ☐ Education
- ☐ Health
- ☐ Professional services
- ☐ Engineering
- ☐ Digital and ICT
- ☐ Retail
- ☐ Visitor economy, tourism and leisure
- ☐ Finance, investment, and insurance
- ☐ Other

Q2.20i If other, please specify
____

Q2.21 How would you describe the main business activity of this establishment? *(PROBE FULLY: What would you type into a search engine to find an organisation like yours online? What is the main product or service of this establishment? What exactly is made or done at this establishment? Who does it sell its product/services to?)*

____

Q2.22 Would you classify your organisation as one that is:

- ◯ Mainly seeking to make a profit
- ◯ A charity or voluntary sector organisation or a social enterprise
- ◯ A local-government financed body (e.g. a service provided or funded by the council such as leisure centres, social care, waste or environmental health services)
- ◯ A central government financed body (e.g. the Civil Service, any part of the NHS, a college or university, the Armed Services, an Executive Agency or other nondepartmental public bodies)
- ◯ None of the above

Q2.23 Are your products or services primarily sold...?

- ◯ Locally – Within the Cheltenham area
- ◯ Locally - within Gloucestershire
- ◯ Regionally – within the South West
- ◯ Nationally – within England
- ◯ Within the UK
- ◯ Within the EU
- ◯ Globally

Q2.24 Does your establishment primarily serve the population...?

- ◯ Locally – Within the Cheltenham area
- ◯ Locally - within Gloucestershire
- ◯ Regionally – within the South West
- ◯ Nationally – within England
- ◯ Within the UK
- ◯ Within the EU
- ◯ Globally

Q3.2 Approximately how many vacancies did your establishment have during the last 12 months?
(Including new positions or openings created by internal promotion, skills needs, business growth etc.)

(Interviewer: If it is a multi-site business please ensure they are only talking about the site they are based at.)

____

Q3.3 How many vacancies did you have for:

	Number
Elementary (e.g. general, warehouse, and agricultural workers)	
Process, plant and machine (e.g. machine operatives, assemblers, forklift truck, train and coach drivers)	
Sales and customer service (e.g. sales assistants, customer service)	
Care, Leisure and other occupations (e.g. nursery workers, veterinary nurses, hairdressers and caretakers)	
Skilled trades (e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers)	
Administrative and secretarial occupations (e.g. book-keepers, library assistants, and office workers)	

Technical and associate professional occupations (e.g. engineering technicians, IT support and taxation experts)	
Professional occupations (e.g. scientists, architects, IT specialists, medical practitioners, solicitors and journalists)	
Chief Executives and senior officials (e.g. division directors, production managers and practice managers)	

Q3.4 Have you recruited anyone at this site in the last 12 months? *(This includes if you have tried to recruit but haven't been able to fill the position)*

- ◯ Yes
- ◯ No
- ◯ Don't know

Q3.5 What were your reasons for recruiting?
Tick all that apply

- ☐ Staff turnover
- ☐ Business growth
- ☐ Internal promotion
- ☐ Additional / new skills required
- ☐ Other

Q3.6 If other please specify

____

Q3.7 Thinking back to your vacancies over the last 12 months, did any of them prove hard to fill?

- ◯ Yes

◯ No

Q3.8 How many of your vacancies for the following proved hard-to-fill?

	Number
Elementary (e.g. general, warehouse, and agricultural workers)	
Process, plant and machine (e.g. machine operatives, assemblers, forklift truck, train and coach drivers)	
Sales and customer service (e.g. sales assistants, customer service)	
Care, Leisure and other occupations (e.g. nursery workers, veterinary nurses, hairdressers and caretakers)	
Skilled trades (e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers)	
Administrative and secretarial occupations (e.g. book-keepers, library assistants, and office workers)	

Technical and associate professional occupations (e.g. engineering technicians, IT support and taxation experts)	
Professional occupations (e.g. scientists, architects, IT specialists, medical practitioners, solicitors and journalists)	
Chief Executives and senior officials (e.g. division directors, production managers and practice managers)	

Q3.9 Were your vacancies difficult to fill for any of the following reasons? Interviewer: please tick other if they not answered yes to one of the first three options below.

	Lack of qualifications the company demands?	Low number of applicants with the required skills	Lack of work experience the company demands	Other
	Yes	Yes	Yes	Yes
Elementary (e.g. general, warehouse, and agricultural workers)	☐	☐	☐	☐
Process, plant and machine (e.g. machine operatives, assemblers, forklift truck, train and coach drivers)	☐	☐	☐	☐
Sales and customer service (e.g.	☐	☐	☐	☐

sales assistants, customer service)				
Care, Leisure and other occupations (e.g. nursery workers, veterinary nurses, hairdressers and caretakers)	☐	☐	☐	☐
Skilled trades (e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers)	☐	☐	☐	☐
Administrative and secretarial occupations (e.g. book-keepers, library assistants, and office workers)	☐	☐	☐	☐
Technical and associate professional occupations (e.g. engineering technicians, IT support and taxation experts)	☐	☐	☐	☐
Professional occupations (e.g. scientists, architects, IT specialists, medical practitioners,	☐	☐	☐	☐

solicitors and journalists)				
Chief Executives and senior officials (e.g. division directors, production managers and practice managers)	☐	☐	☐	☐

Q3.10 For what other reasons do you believe your vacancies were hard to fill?

- ☐ Too much competition from other employers
- ☐ Not enough people interested in doing this type of job
- ☐ Low number of applicants with the required attitude, motivation or personality
- ☐ Low number of applicants generally
- ☐ Poor career progression/lack of prospects in specific role
- ☐ Job entails shift work/unsociable hours
- ☐ Remote location / poor public transport
- ☐ Unreasonable travel to work times
- ☐ Seasonal employment
- ☐ Change in government living wage policy/labour costs
- ☐ Poor terms and conditions (e.g. pay) offered for post
- ☐ Other
- ☐ ⊗Don't Know

Q3.11 If other, please specify

____

Q3.12
Have you found any of the following skills difficult to obtain from applicants? *(Read out and tick all that apply):*

- ☐ Computer literacy / basic IT skills
- ☐ Advanced or specialist IT skills (such as networking, programming/ coding)
- ☐ Solving complex problems requiring a solution specific to the situation
- ☐ Reading and understanding instructions, guidelines, manuals or reports
- ☐ Writing instructions, guidelines, manuals or reports
- ☐ Basic numerical skills and understanding
- ☐ More complex numerical or statistical skills and understanding
- ☐ Communicating in a foreign language
- ☐ Manual dexterity-for example, to mend, repair, assemble, construct or adjust things
- ☐ Adapting to new equipment or materials
- ☐ Knowledge of products and services offered by your organisation and organisations like yours
- ☐ Knowledge of how your organisation works
- ☐ Specialist skills or knowledge needed to perform the role
- ☐ Soft skills e.g. basic communication skills, team working or time management
- ☐ Don't know
- ☐ ⊗Other

Q3.13 If other, please specify

____

Q3.14 Thinking now about all occupations in which you have hard-to-fill vacancies, are hard-to-fill vacancies causing this establishment to...
(Read out and tick all that apply)

- ☐ Lose business or orders to competitors
- ☐ Delay developing new products or services

- ☐ Have difficulties meeting quality standards
- ☐ Experience increased operating costs
- ☐ Have difficulties introducing new working practices
- ☐ Increase workload for other staff
- ☐ Outsource work
- ☐ Withdraw from offering certain products or services altogether
- ☐ Have difficulties meeting customer services objectives
- ☐ Have difficulties introducing technological change
- ☐ Other
- ☐ ⊗None
- ☐ ⊗Don't know

Q3.15 If other, please specify

____

Q3.16 What are you doing to overcome any difficulties in recruitment?

- ☐ Increasing salaries
- ☐ Increasing the training given to your existing workforce
- ☐ Redefining existing jobs
- ☐ Offering flexible working patterns
- ☐ Increasing advertising/recruitment spend
- ☐ Increasing/ expanding trainee programmes
- ☐ Using NEW recruitment methods or channels
- ☐ Recruiting workers who are non-UK nationals
- ☐ Bringing in contractors to do the work, or contracting it out

- ☐ Being prepared to offer training to less qualified recruits
- ☐ ⊗Other
- ☐ ⊗Nothing
- ☐ ⊗Don’t know

Q3.17 If other, please specify

____

Q3.18 Of those you have employed in the last three years, have any been:

	Yes	No	Don't know
School leaver in their first job since leaving school	○	○	○
Further education leaver in their first job since leaving college	○	○	○
University leaver in their first job since leaving university	○	○	○
Experienced/skilled workers	○	○	○
Those new to employment	○	○	○
Workplace returners	○	○	○
Apprentices	○	○	○

Q3.19 Would you say that the school leavers you have employed have been adequately prepared for work at your company?

- ○ Very well prepared
- ○ Well prepared
- ○ Poorly prepared
- ○ Very poorly prepared

Q3.20 If poorly (or very poorly) prepared what were the main skills school leavers were lacking?
(Open box to comment and then code below)

____
____
____
____
____

Q3.21 Coding

- ☐ Computer literacy / basic IT skills
- ☐ Advanced or specialist IT skills
- ☐ Solving complex problems requiring a solution specific to the situation
- ☐ Reading and understanding instructions, guidelines, manuals or reports
- ☐ Writing instructions, guidelines, manuals or reports
- ☐ Basic numerical skills and understanding
- ☐ More complex numerical or statistical skills and understanding
- ☐ Communicating in a foreign language
- ☐ Manual dexterity-for example, to mend, repair, assemble, construct or adjust things
- ☐ Adapting to new equipment or materials
- ☐ Knowledge of products and services offered by your organisation and organisations like yours
- ☐ Knowledge of how your organisation works
- ☐ Specialist skills or knowledge needed to perform the role
- ☐ ⨂Don’t know
- ☐ ⨂None
- ☐ Other

Q3.22 If other, please specify

____

Q3.23 Would you say that the further education college leavers you have employed have been adequately prepared for work at your company?

- ◯ Very well prepared
- ◯ Well prepared
- ◯ Poorly prepared
- ◯ Very poorly prepared

Q3.24 If poorly (or very poorly) prepared what were the main skills further education college leavers were lacking? (Open box to comment and then code below)

____

Q3.25 Coding

- ☐ Computer literacy / basic IT skills
- ☐ Advanced or specialist IT skills
- ☐ Solving complex problems requiring a solution specific to the situation
- ☐ Reading and understanding instructions, guidelines, manuals or reports
- ☐ Writing instructions, guidelines, manuals or reports
- ☐ Basic numerical skills and understanding
- ☐ More complex numerical or statistical skills and understanding
- ☐ Communicating in a foreign language
- ☐ Manual dexterity-for example, to mend, repair, assemble, construct or adjust things
- ☐ Adapting to new equipment or materials
- ☐ Knowledge of products and services offered by your organisation and organisations like yours
- ☐ Knowledge of how your organisation works
- ☐ Specialist skills or knowledge needed to perform the role
- ☐ Soft skills e.g. basic communication skills, team working or time management

- ☐ ⨂Don't know
- ☐ ⨂None
- ☐ Other

Q3.26 If other, please specify

____

Q3.27 Would you say that the university leavers you have employed have been adequately prepared for work at your company?

- ○ Very well prepared
- ○ Well prepared
- ○ Poorly prepared
- ○ Very poorly prepared

Q3.28 If poorly (or very poorly) prepared what were the main skills university leavers were lacking? (Open box to comment and then code below)

____

Q3.29 Coding

- ☐ Computer literacy / basic IT skills
- ☐ Advanced or specialist IT skills
- ☐ Solving complex problems requiring a solution specific to the situation
- ☐ Reading and understanding instructions, guidelines, manuals or reports
- ☐ Writing instructions, guidelines, manuals or reports
- ☐ Basic numerical skills and understanding
- ☐ More complex numerical or statistical skills and understanding
- ☐ Communicating in a foreign language
- ☐ Manual dexterity-for example, to mend, repair, assemble, construct or adjust things
- ☐ Adapting to new equipment or materials

- [ ] Knowledge of products and services offered by your organisation and organisations like yours
- [ ] Knowledge of how your organisation works
- [ ] Specialist skills or knowledge needed to perform the role
- [ ] Soft skills e.g. basic communication skills, team working or time management
- [ ] ⊗Don't know
- [ ] ⊗None
- [ ] Other

Q3.30 If other, please specify

____

Q3.31 Would you say that the experienced/skilled workers you have employed have been adequately prepared for work at your company?

- ◯ Very well prepared
- ◯ Well prepared
- ◯ Poorly prepared
- ◯ Very poorly prepared

Q3.32 If poorly (or very poorly) prepared what were the main skills experienced / skilled workers were lacking?

(Open box to comment and then code below)

____

Q3.33 Coding

- [ ] Computer literacy / basic IT skills
- [ ] Advanced or specialist IT skills
- [ ] Solving complex problems requiring a solution specific to the situation
- [ ] Reading and understanding instructions, guidelines, manuals or reports
- [ ] Writing instructions, guidelines, manuals or reports

- ☐ Basic numerical skills and understanding
- ☐ More complex numerical or statistical skills and understanding
- ☐ Communicating in a foreign language
- ☐ Manual dexterity-for example, to mend, repair, assemble, construct or adjust things
- ☐ Adapting to new equipment or materials
- ☐ Knowledge of products and services offered by your organisation and organisations like yours
- ☐ Knowledge of how your organisation works
- ☐ Specialist skills or knowledge needed to perform the role
- ☐ Soft skills e.g. basic communication skills, team working or time management
- ☐ ⊗Don't know
- ☐ ⊗None
- ☐ Other

Q3.34 If other, please specify

____

Q3.35 Would you say that those new to employment that you have employed have been adequately prepared for work at your company?

- ○ Very well prepared
- ○ Well prepared
- ○ Poorly prepared
- ○ Very poorly prepared

Q3.36 If poorly (or very poorly) prepared what were the main skills those new to employment were lacking?
(Open box to comment and then code below)

____

Q3.37 Coding

- ☐ Computer literacy / basic IT skills
- ☐ Advanced or specialist IT skills
- ☐ Solving complex problems requiring a solution specific to the situation
- ☐ Reading and understanding instructions, guidelines, manuals or reports
- ☐ Writing instructions, guidelines, manuals or reports
- ☐ Basic numerical skills and understanding
- ☐ More complex numerical or statistical skills and understanding
- ☐ Communicating in a foreign language
- ☐ Manual dexterity-for example, to mend, repair, assemble, construct or adjust things
- ☐ Adapting to new equipment or materials
- ☐ Knowledge of products and services offered by your organisation and organisations like yours
- ☐ Knowledge of how your organisation works
- ☐ Specialist skills or knowledge needed to perform the role
- ☐ Soft skills e.g. basic communication skills, team working or time management
- ☐ ⊗Don’t know
- ☐ ⊗None
- ☐ Other

Q3.38 If other, please specify

____

Q3.39 Would you say that the workplace returners you have employed have been adequately prepared for work at your company?

- ○ Very well prepared
- ○ Well prepared

◯ Poorly prepared

◯ Very poorly prepared

Q3.40 If poorly (or very poorly) prepared what were the main skills workplace returners were lacking?
(Open box to comment and then code below)

____

Q3.41 Coding

☐ Computer literacy / basic IT skills

☐ Advanced or specialist IT skills

☐ Solving complex problems requiring a solution specific to the situation

☐ Reading and understanding instructions, guidelines, manuals or reports

☐ Writing instructions, guidelines, manuals or reports

☐ Basic numerical skills and understanding

☐ More complex numerical or statistical skills and understanding

☐ Communicating in a foreign language

☐ Manual dexterity-for example, to mend, repair, assemble, construct or adjust things

☐ Adapting to new equipment or materials

☐ Knowledge of products and services offered by your organisation and organisations like yours

☐ Knowledge of how your organisation works

☐ Specialist skills or knowledge needed to perform the role

☐ Soft skills e.g. basic communication skills, team working or time management

☐ ⊗Don’t know

☐ ⊗None

☐ Other

Q3.42 If other, please specify

____

Q4.2 Are there particular jobs in which you have difficulties retaining staff? *PROMPT IF NECESSARY: Retention difficulties are when a high number of staff leave (but not as a direct result of downsizing or redundancy)*

◯ Yes

◯ No

◯ Don't know

Q4.3 What type of professions were these in (tick as many as apply)?

☐ Elementary (e.g. General, warehouse, and agricultural workers)

☐ Process, plant and machine (e.g. machine operatives, assemblers, forklift truck, train and coach drivers)

☐ Sales and customer service (e.g. sales assistants, customer service)

☐ Care, Leisure and other occupations (e.g. nursery workers, veterinary nurses, hairdressers and caretakers)

☐ Skilled trades (e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers)

☐ Administrative and secretarial occupations (e.g. bookkeepers, library assistants, and office workers)

☐ Technical and associate professional occupations (e.g. engineering technicians, IT support and taxation experts)

☐ Professional occupations (e.g. scientists, architects, IT specialists, medical practitioners, solicitors and journalists)

☐ Chief Executives and senior officials (e.g. division directors, production managers and practice managers)

Q4.4 Which of the following are the main reasons why it is difficult to retain staff in these occupations…?

☐ Wages offered are lower than those offered by other organisations

- ☐ Impact of the benefits trap
- ☐ Geographic location of the site
- ☐ Unattractive conditions of employment
- ☐ Lack of career progression
- ☐ Long/unsocial hours
- ☐ Too much competition from other employers
- ☐ Not enough people interested in doing this type of work
- ☐ Staff don't want long term commitment
- ☐ ⊗Other

Q4.5 If other, please specify

____

Q4.6 Upskilling

Q4.7 How many staff from the following occupational categories of your business are most likely to be affected by the need to acquire new skills or knowledge? *(Read out and tick all that apply)*

	Number
Elementary (e.g. General, warehouse, and agricultural workers)	
Process, plant and machine (e.g. machine operatives, assemblers, forklift truck, train and coach drivers)	

Sales and customer service (e.g. sales assistants, customer service)	
Care, Leisure and other occupations (e.g. nursery workers, veterinary nurses, hairdressers and caretakers)	
Skilled trades (e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers)	
Administrative and secretarial occupations (e.g. book-keepers, library assistants, and office workers)	
Technical and associate professional occupations (e.g. engineering technicians, IT support and taxation experts)	
Professional occupations (e.g. scientists, architects, IT specialists, medical practitioners, solicitors and journalists)	
Chief Executives and senior officials (e.g. division directors, production managers and practice managers)	

Q4.8 Are the main reasons due to any of the following? *(Read out and tick all that apply).*

- The recent development of new products and services
- The recent introduction of new working practices
- The recent introduction of new technologies or equipment
- New legislative or regulatory requirement
- Increased competitive pressure
- Succession replacement/aging workforce
- Business growth
- Other
- ⊗Don't know

Q4.9 If other, please specify

____

Q4.10 Which, if any, of the following skills do you feel needs improving? (Read out and tick all that apply).

- Computer literacy / basic IT and digital skills
- Advanced or specialist IT skills (such as networking, programming/ coding)
- Solving complex problems requiring a solution specific to the situation
- Reading and understanding instructions, guidelines, manuals or reports
- Writing instructions, guidelines, manuals or reports
- Basic numerical skills and understanding
- More complex numerical or statistical skills and understanding
- Communicating in a foreign language
- Manual dexterity-for example, to mend, repair, assemble, construct or adjust things

- ☐ Adapting to new equipment or materials
- ☐ Knowledge of products and services offered by your organisation and organisations like yours
- ☐ Knowledge of how your organisation works
- ☐ Leadership and management
- ☐ Specialist skills or knowledge needed to perform the role
- ☐ Soft skills e.g. basic communication skills, team working or time management
- ☐ Other
- ☐ Don't know

Q4.11 If other, please specify

____

Q5.2 Which of the following reflects your total allocated annual training budget for this site? *(INTERVIEWER NOTE: IF A MULTI-SITE BUSINESS, REFERS TO JUST THE LOCAL SITE)*

- ○ None
- ○ up to £500
- ○ £501 to £1000
- ○ £1001 to £5000
- ○ £5001 to £10000
- ○ £10001 to £15000
- ○ £15000+
- ○ Don't know

Q5.3
Does your business have any particular skills needs in the area of STEM (Science, Technology, Engineering or Maths)?

- ○ Yes
- ○ No

Q5.4 If yes, are you having difficulties meeting these skills needs?

- ◯ Yes
- ◯ No

Q5.5 Please specify what these difficulties are:

____

Q6.1 How long has your business been based in the Cheltenham area (under the current owners)?

- ◯ Less than one year
- ◯ One to three years
- ◯ Three to five years
- ◯ Five to ten years
- ◯ More than ten years

Q6.2 Did you…?

- ◯ Move your business to Cheltenham from somewhere else
- ◯ Start your business in Cheltenham as part or branch of a national or regional company
- ◯ Start your business in Cheltenham, with prior business ownership experience
- ◯ Start your business in Cheltenham with no prior business ownership experience

Q6.3 Since your business has been based in Cheltenham, have you…?

- ◯ Found it easier to get employees with the skills you need
- ◯ Found it harder to get employees with the skills you need
- ◯ Not seen any change in getting employees with the skills you need

Q6.4 Why do you say that?

____

Q6.5 Since your business has been based in Cheltenham, have you…?

- ◯ Found it easier to retain employees with the skills you need
- ◯ Found it harder to retain employees with the skills you need
- ◯ Not seen any change in retaining employees with the skills you need

Q6.6 Why do you say that?

___

Q6.7 Since your business has been based in Cheltenham, have you…?

- ◯ Found it easier to get employees with the skills you need
- ◯ Found it harder to get employees with the skills you need
- ◯ Not seen any change in getting employees with the skills you need

Q6.8 Why do you say that?

___

Q6.9 When you started your business in Cheltenham, did you…?

- ◯ Find it hard to recruit employees with the skills you need
- ◯ Find it easy to recruit employees with the skills you need

Q6.10 Why do you say that?

___

Q6.11 What, in your view, are the key challenges for employees working or seeking jobs in the Cheltenham area (tick all that apply)?

- ☐ Housing costs
- ☐ Long commute and travel to work times
- ☐ Lack of accessibility to places of employment (e.g. parking)
- ☐ Not enough jobs in specific sectors
- ☐ Not enough jobs in high skills occupations and roles
- ☐ Lack of career progression opportunities
- ☐ Low wages
- ☐ Other
- ☐ I don't see any real challenges

Q6.12 What are those sectors? (not enough jobs in specific sectors)

___

Q6.13 What are those high skilled occupations or roles?

____

Q6.14 Other, please explain

____

Q6.15 What, in your view, are the key challenges for employers doing business in the Cheltenham area (tick all that apply)?

- ☐ Lack of appropriate commercial space
- ☐ Lack of developed supply chains
- ☐ Lack of accessibility to places of business (e.g. parking)
- ☐ Lack of talent pool in specific sectors
- ☐ Lack of business clusters in specific sectors
- ☐ Lack of work ready candidates for low skilled jobs
- ☐ Difficulties in accessing markets
- ☐ Difficulties in accessing finance
- ☐ Difficulties in accessing business support
- ☐ Other
- ☐ I don't see any real challenges

Q6.16 What are those sectors? (lack of talent pool)

____

Q6.17 What are those sectors? (lack of business clusters)

____

Q6.17i If other, please specify

____

Q6.18 What in your view are the key opportunities for employers doing business in Cheltenham? (all that apply)

- ☐ Vibrant retail and shopping offer
- ☐ Easy accessibility to core cities (Bristol, Birmingham, London)
- ☐ Strong arts and cultural offer

- ☐ Thriving festivals
- ☐ Strong night economy
- ☐ Excellent quality of life
- ☐ Other

Q6.18i If other, please specify

____

Q7.2 In the next 12 months do you expect your turnover to:

- ○ Increase
- ○ Stay the same
- ○ Decrease
- ○ Don't know

Q7.3 By approximately what percentage do you expect your turnover to increase / decrease by in the next 12 months?

____

Q7.4 For what reasons do you expect an increase in turnover (tick all that apply)

- ☐ New product
- ☐ New market
- ☐ New process
- ☐ Increased performance
- ☐ New technology
- ☐ Growth in existing markets
- ☐ Other

Q7.5 If other, please specify

____

Q7.6 For what reasons do you expect your turnover to decrease in the next 12 months?

____

Q7.7 In the next 12 months do you expect the local (Cheltenham) economy to:

- ◯ Improve
- ◯ Stay the same
- ◯ Deteriorate
- ◯ Don't know

Q7.8 For what reasons do you say that?

____

Q7.9 Approximately what percentage of your workforce are non-EU/EEA nationals?

- ◯ None
- ◯ 1 to 25%
- ◯ 26 to 50%
- ◯ 51 to 75%
- ◯ 76 to 100%

Q7.10 Of your staff, approximately what percentage are non-UK nationals from the EU/EEA?

- ◯ None
- ◯ 1 to 25%
- ◯ 26 to 50%
- ◯ 51 to 75%
- ◯ 76 to 100%
- ◯ N/A

Q7.11 Have you noticed or do you expect any impact on your business from the UK's decision to leave the EU?

- ◯ Yes we have
- ◯ No we haven't but we expect to in the future
- ◯ No and we don't expect to in the future

Q7.12 Please describe what impact you have seen/expect to see in the future

____

Q8.2 Cheltenham is twinned with the following towns:

Gottingen (Germany)
Annecy (France)
Weihai (China)
Sochi (Russia)
Cheltenham (Pennsylvania, USA)

Would your business be interested in developing closer connections with key sectors within our twin towns.

- ◯ Yes
- ◯ No
- ◯ Don't know, not sure

Q8.3 How do you think we could develop further economic benefits from our associations with our twin towns?

____

Q8.4 We are asking employers if they would be willing to send a short follow-up survey to their employees on our behalf that will get their views about Cheltenham as a place to live and work. **The survey will not ask any questions about their current job or employer and will not gather any information about their workplace**. For employers who agree to send out the survey, we will provide a bespoke report of the anonymised results from their own employees, benchmarked against the wider Cheltenham responses. Would you be willing to send out that survey to your employees?

- ◯ Yes, I will send it out
- ◯ Maybe, but I'd like to see more information
- ◯ No

Q8.5 What would be the best email address to send information about the survey to? (Please note: we will not share this email address with anyone else, or use it for any other purpose than sending information about the Cheltenham Employees survey)

____

Q8.6 Do you have any closing thoughts about what organisations like Cheltenham Borough Council can do to help businesses with recruitment and training needs?

____

Q8.7 From time to time, it is useful to connect the information that we have collected from this survey with other surveys or databases; when we do this, your confidentiality is always maintained. Would you be OK for this to be done?

- ◯ Yes
- ◯ No

Thank you for completing this survey.

Employee Survey

Cheltenham Employee Consultation

Thank you for taking the time to complete this survey.

This survey has been commissioned by Cheltenham Borough Council and is being delivered by Wavehill (social and economic research consultancy). The purpose of this survey is to develop a better understanding of the attractions and challenges of living and working in Cheltenham. Your feedback will be used to shape the strategy of the Cheltenham Borough Council in developing and supporting the local labour market and retaining the skills and talent our economy needs and deserves.

The questionnaire will take around 10-15 minutes to complete. Participation is voluntary, though we very much hope you will take part. The data you provide will only be used for the purposes of this research. Any personal information collected as part of the research is kept confidential. Your answers to the interview will not be made public in a way that could lead to you being identified. Wavehill will produce a report based on the information but this will not identify any individuals. It is also important to note that the team undertaking the research do not work for Cheltenham Borough Council or any of the organisations that are involved in the delivery or funding of this project. This is an independent research.

Wavehill will delete the information you provide and all personal data relating to this research within six months of the end of the research. If you have any queries regarding the research, please feel free to contact either Declan Turner, who is leading the research (declan.turner@wavehill.com) or Tracey Crews, Director of Planning, Place & Growth, Cheltenham Borough Council at +44 (0)1242 264126. Under the new data protection legislation, you have the right:

- To access your personal data held by Cheltenham Borough Council.
- To require Cheltenham Borough Council to correct any mistakes in that data.
- To (in certain circumstances) object to or restrict processing.
- For (in certain circumstances) your data to be 'erased'.

Please contact the Tracey Crews if you wish to do any of these things in relation to this project.

If you have any concerns about how your data has been handled, you can lodge a complaint with the Information Commissioner's Office who is the independent regulator for data protection. You can contact the Information Commissioner's Office on 01625 545 745 or 0303 123 1113, via the website www.ico.gov.uk, or write to: Information Commissioner, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.

i Are you happy to continue with the survey? *Please note you can stop completing the questionnaire at any time if you decide you do not want to continue.*

- Yes
- No

ii Please note that by starting the survey that you confirm that you are happy for the information that you provide to be collected and used as described above. If you stop part way through the questionnaire the information that you have provided will be recorded. If you would like to delete any of the information that you have provided, please contact surveys@wavehill.com.

Q1 Just to confirm, please select your employer from the list below *Please note that whilst employers will be provided with an* ***anonymised*** *report of research findings, none of the feedback will be attributable to you.*

- Prestbury Marketing & Consulting Limited
- Promenade Jewellers
- WPS Interactive
- Hydropool Cheltenham
- Cheltenham Ladies' College Education
- Calibro Consultants Ltd
- Barber Tom Saunders
- Spice Exchange
- Planit Products Ltd.
- Cotswold Connection
- Continental Ltd
- Chameleons hairdressing
- Spa Vapes Ltd
- InfoSec People
- M R Ratcliffe Consultants LTD
- HymnSheet Ltd
- Cineworld
- Kiwa Ltd
- St Faiths Nursing Home
- CGT Lettings
- Chiquito
- RGV Aviation Ltd
- Lyndon Design
- Meadows Day Nursery
- Neals Yard Remedies
- Tree Tops Day Nurseries
- Portman Dentalcare
- Carlisle Support Services
- Greatfield Park Primary School
- The Clarence Social
- Battledown Centre for Children & Families
- Holy Trinity C of E Primary School
- Edward Elgar Publishing Ltd
- Dot Digital (Comapi)
- Charlton Kings Infants' School
- The Old Courthouse

- ◯ Low Cost Cleaning Ltd
- ◯ Lilian Faithfull Care
- ◯ St Edward's Cheltenham
- ◯ Keith Scarrott Shoes
- ◯ Under The Prom
- ◯ Printwaste Recycling & Shredding
- ◯ Lumiere
- ◯ Care at Home
- ◯ Hotel Chocolat
- ◯ Alto Resources
- ◯ Gloucestershire House Care Home
- ◯ St Vincent's & St George's Association
- ◯ Martin Commercial Properties Ltd
- ◯ Gloucestershire Hospital Education Service
- ◯ Castle Fine Art
- ◯ Regent Arcade
- ◯ Cosy Club
- ◯ Charles Russell Speechley
- ◯ Crowe Clark Whithill
- ◯ Ilec Ltd
- ◯ James of Montpelier
- ◯ Soho Coffee Company
- ◯ Pennant International Group PLC
- ◯ Global ATS
- ◯ Belmont School
- ◯ Lakeland
- ◯ Coventry Building Society
- ◯ Cheltenham Probation Service
- ◯ Higher Education Statistics Agency
- ◯ Cheltenham Trust
- ◯ Contour
- ◯ Naunton Park Primary School
- ◯ P3 Care
- ◯ Dunnally Primary School
- ◯ Another company

Q1a Please tell us the name of the company you work for

____

Q2 **Firstly, to gain a greater understanding of the spread of people working in Cheltenham, we would like to ask a few questions about you:**

Q2a What is your age? (in number of years only)

____

Q2b What is your gender?

- ◯ Male
- ◯ Female

- Other
- Prefer not to say

Q3 Which of the following best describes your highest qualification to date:

- **Entry Level**
- **Level 1** *(e.g. grades 1,2 and 3 or D, E, F, G at GCSE)*
- **Level 2** *(e.g. grades 4, 5, 6, 7, 8, 9 or A*, A, B, C at GCSE)*
- **Level 3** *(e.g. AS Levels and A Levels)*
- **Level 4** *(e.g. Higher National Certificates)*
- **Level 5** *(e.g. Higher National Diplomas and foundation degrees)*
- **Level 6** *(e.g. Degrees excluding foundation and masters)*
- **Level 7** *(e.g. master's degree)*
- **Level 8** *(e.g. doctorate)*

Q4 In order to gain a greater understanding of the geographical spread of employees who have taken part in this survey across Cheltenham, please could you select the postcode area you live in:

- GL50
- GL51
- GL52
- GL53
- GL54
- Outside Cheltenham

Q4a If living outside of the Cheltenham area, please provide the first 3 or 4 digits of your postcode e.g. GL55

____

Q5 Which of the following best describes your current household situation?

- One-person household
- One family only
- Other

Q5i Are you a:

- ◯ Cohabiting couple with no children
- ◯ Cohabiting couple with non-dependent children
- ◯ Cohabiting couple with dependent children
- ◯ Lone parent with non-dependent children
- ◯ Lone parent with dependent children

Q5ii Are you:

- ◯ All aged 18 or over
- ◯ Other

Q5a Thinking about where you live, do you:

- ◯ Own it
- ◯ Socially rent it *e.g. from the council*
- ◯ Privately rent it *e.g. through a private landlord or letting agency*
- ◯ Other

Q5b Other, please specify.

____

Q6 Which of the below statements best captures your relationship to the community you live in?

- ◯ I was born here and have never moved away from the area
- ◯ I grew up here as a child, moved away but returned as an adult
- ◯ I moved here and have never lived anywhere else as an adult
- ◯ I have lived in several places as an adult and this is one of them
- ◯ I am only here on a temporary basis and consider somewhere else my real home
- ◯ Other

Q6a Other, please specify.

____

Q7 Which of the following occupation descriptions best describes your current job?

- ◯ **Chief Executives and senior officials** *(e.g. division directors, production managers and practice managers)*

- ◯ **Professional occupations** *(e.g. scientists, architects, IT specialists, medical practitioners, solicitors and journalists)*
- ◯ **Technical and associate professional occupations** *(e.g. engineering technicians, IT support and taxation experts)*
- ◯ **Administrative and secretarial occupations** *(e.g. book-keepers, library assistants, and office workers)*
- ◯ **Skilled trades** *(e.g. maintenance and telecom engineers, construction workers, butchers, chefs and farmers)*
- ◯ **Care, Leisure and other occupations** *(e.g. nursery workers, veterinary nurses, hairdressers and caretakers)*
- ◯ **Sales and customer service** *(e.g. sales assistants, customer service)*
- ◯ **Process, plant and machine** *(e.g. machine operatives, assemblers, forklift truck, train and coach drivers)*
- ◯ **Elementary** *(e.g. general, warehouse, and agricultural workers)*

Q8 For how long have you been employed with your current employer?

- ◯ less than 6 months
- ◯ 6 months to 12 months
- ◯ 12 months to 18 months
- ◯ 18 months to 24 months
- ◯ 3 years or more

Q8a Is this the only role you have held with your current employer?

- ◯ Yes
- ◯ No
- ◯ Don't know

Q8ai Please provide details of other roles

____

Q8b Except for any roles with your current employer, have you had any other jobs that were based in Cheltenham?

- ◯ Yes
- ◯ No

- ◯ Don't know

Q8bi How many other jobs have you had that were based in Cheltenham? (answer as a number only)

____

Q8c Have you had any jobs that were based outside of Cheltenham?

- ◯ Yes
- ◯ No
- ◯ Don't know

Q8ci How many jobs have you had that were based outside of Cheltenham? (answer as a number only)

____

Q9 In your view, what are the key opportunities for individuals living in the Cheltenham area? (please tick all that apply)

- ☐ Vibrant retail and shopping offer
- ☐ Easy accessibility to core cities (Bristol, Birmingham, London)
- ☐ Strong arts and cultural offer
- ☐ Thriving festivals
- ☐ Strong night economy
- ☐ Excellent quality of life
- ☐ Sense of community
- ☐ Other

Q9a Other, please specify.

____

Q10 Can you tell us how important each of the following was in your decision to move Cheltenham:

	very important	somewhat important	neither important nor unimportant	somewhat unimportant	very unimportant

Good job opportunities	◯	◯	◯	◯	◯
Schools	◯	◯	◯	◯	◯
Access to amenities *(shops, services, health care)*	◯	◯	◯	◯	◯
Arts and cultural offer	◯	◯	◯	◯	◯
Outdoor activities	◯	◯	◯	◯	◯
A sense of community	◯	◯	◯	◯	◯

Q11 Is there a particular reason why you do not currently live in Cheltenham?

◯ Housing costs *i.e. It is cheaper to live outside of Cheltenham*

◯ Long commute and travel to work times

◯ Because I live near my family and/or friends

◯ I live in a good catchment area for schools

◯ I live near to other facilities e.g. shops, libraries, sports centres

◯ Quality of life elsewhere

◯ I live near transport links *i.e. easy access to cities e.g Bristol, Birmingham, London*

◯ I prefer living in rural areas

◯ Other

Q11a Other, please specify.

____

Q11b Would you like to live in Cheltenham?

◯ Yes

◯ No

◯ Don't know

Q11bi Why do you want to live in Cheltenham

____

Q11bii Why don't you want to live in Cheltenham

____

Q12 Thinking about your current employment, how prepared for work did you feel when you started your job?

- ◯ Very prepared
- ◯ Somewhat prepared
- ◯ Neither prepared nor unprepared
- ◯ Somewhat unprepared
- ◯ Very unprepared

Q13 From your experience, what are the key challenges for individuals working in the Cheltenham area? (please select all that apply)

- ☐ Housing costs
- ☐ Long commute and travel to work times
- ☐ Poor/unreliable public transport
- ☐ Lack of accessibility to places of employment (e.g. parking)
- ☐ Not enough jobs in specific sectors
- ☐ Not enough jobs in high skills occupations and roles
- ☐ Lack of career progression opportunities
- ☐ Low wages
- ☐ I don't see any real challenges
- ☐ Other

Q13a Other, please specify.

____

Q14 Do you anticipate that the United Kingdom exiting the European Union will impact your job in any way?

- ◯ Yes
- ◯ No

◯ Don't know

Q14a Please explain why

____

Q15 Would you recommend Cheltenham as a place to work to others?

◯ Yes

◯ No

◯ Don't know

Q15a Explain your answer.

____

Q16 Is there anything else you would like to say about working and or living in Cheltenham that has not been covered in this survey?

____

Thank you for taking the time to complete this survey.

Please click 'submit' to record your response

wavehill™
social and economic research

01545 571711
wavehill@wavehill.com
wavehill.com