

YouGov - business leaders survey

505 director-level staff or higher in the private sector

Fieldwork Dates: 5th - 24th August 2020

All	Business size			Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	Small business	Medium business	Large business					

Twelve months from now, how much better or worse do you expect the condition of each of the following to be compared to how it was before the coronavirus outbreak?

Your company

Unweighted base	505	202	75	228	52	50	51	55	21
Base	505	187	76	242	51	51	51	51	20
Much better	8%	5%	7%	10%	8%	15%	7%	7%	5%
Somewhat better	23%	23%	27%	22%	23%	34%	30%	33%	15%
About the same	37%	37%	36%	36%	33%	30%	28%	39%	28%
Somewhat worse	23%	24%	22%	23%	25%	17%	21%	17%	33%
Much worse	6%	8%	8%	5%	9%	4%	12%	4%	14%
Don't know	3%	3%	-	3%	2%	-	2%	-	5%
Net: Better	31%	28%	34%	32%	31%	48%	37%	40%	20%
Net: Worse	30%	32%	29%	29%	34%	21%	33%	21%	47%

The sector your company operates in (if it operates in more than one sector please think of the most important one)

Unweighted base	505	202	75	228	52	50	51	55	21
Base	505	187	76	242	51	51	51	51	20
Much better	6%	5%	9%	6%	2%	10%	9%	7%	5%
Somewhat better	19%	18%	18%	21%	27%	26%	22%	22%	15%
About the same	35%	35%	33%	35%	27%	37%	24%	41%	14%
Somewhat worse	27%	26%	32%	26%	29%	19%	21%	24%	37%
Much worse	11%	14%	8%	9%	14%	8%	20%	6%	24%
Don't know	3%	3%	1%	3%	2%	-	4%	-	5%
Net: Better	25%	23%	27%	27%	29%	36%	31%	29%	20%
Net: Worse	37%	40%	39%	35%	42%	27%	41%	30%	61%

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All	Industry								
	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other

Twelve months from now, how much better or worse do you expect the condition of each of the following to be compared to how it was before the coronavirus outbreak?

Your company

Unweighted base	505	32	22	55	29	25	15	14	15	69
Base	505	30	20	51	51	25	15	15	20	56
Much better	8%	3%	13%	6%	4%	13%	21%	7%	-	8%
Somewhat better	23%	19%	14%	29%	-	28%	12%	22%	20%	26%
About the same	37%	59%	37%	36%	42%	47%	27%	30%	52%	31%
Somewhat worse	23%	19%	27%	22%	33%	13%	33%	35%	21%	25%
Much worse	6%	-	5%	4%	13%	-	7%	7%	-	6%
Don't know	3%	-	5%	4%	7%	-	-	-	7%	4%
Net: Better	31%	22%	27%	35%	4%	40%	34%	28%	20%	33%
Net: Worse	30%	19%	32%	26%	47%	13%	40%	42%	21%	31%

The sector your company operates in (if it operates in more than one sector please think of the most important one)

Unweighted base	505	32	22	55	29	25	15	14	15	69
Base	505	30	20	51	51	25	15	15	20	56
Much better	6%	3%	9%	9%	4%	8%	7%	6%	-	2%
Somewhat better	19%	10%	14%	24%	7%	20%	13%	15%	20%	20%
About the same	35%	52%	28%	36%	24%	44%	34%	43%	46%	42%
Somewhat worse	27%	33%	45%	20%	39%	23%	26%	29%	27%	25%
Much worse	11%	3%	-	7%	23%	-	20%	7%	-	7%
Don't know	3%	-	5%	4%	4%	4%	-	-	7%	4%
Net: Better	25%	13%	23%	33%	10%	29%	20%	22%	20%	22%
Net: Worse	37%	35%	45%	27%	61%	23%	46%	36%	27%	32%

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All	Business size			Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	Small business	Medium business	Large business					

The UK economy

Unweighted base	505	202	75	228	52	50	51	55	21
Base	505	187	76	242	51	51	51	51	20
Much better	4%	3%	10%	4%	2%	6%	6%	7%	-
Somewhat better	13%	12%	13%	13%	16%	20%	8%	13%	10%
About the same	10%	9%	8%	11%	17%	20%	14%	11%	5%
Somewhat worse	36%	41%	34%	34%	28%	36%	33%	35%	53%
Much worse	35%	33%	36%	37%	35%	18%	38%	33%	33%
Don't know	2%	3%	-	1%	2%	-	2%	2%	-
Net: Better	17%	15%	23%	17%	18%	26%	14%	20%	10%
Net: Worse	72%	74%	70%	71%	64%	54%	71%	68%	85%

If the government discontinued the furloughed workers scheme, what proportion of your workforce would you expect to have to let go in the three months following the scheme coming to an end?

Unweighted base	389	141	66	182	42	46	34	32	17
Base	396	133	66	197	41	46	33	29	17
0% [0]	33%	47%	32%	24%	32%	23%	36%	46%	11%
1-9% [5]	16%	11%	18%	19%	24%	14%	-	7%	-
10-19% [14.5]	12%	7%	15%	15%	19%	20%	15%	6%	17%
20-29% [24.5]	7%	9%	3%	7%	5%	9%	14%	3%	16%
30-39% [34.5]	3%	5%	6%	1%	2%	2%	5%	7%	6%
50-49% [44.5]	6%	6%	7%	6%	9%	8%	3%	6%	13%
50%-59% [54.5]	1%	1%	-	2%	-	7%	-	-	6%
60%-69% [64.5]	1%	3%	-	1%	2%	2%	3%	-	-
70%-79% [74.5]	2%	2%	3%	1%	3%	-	3%	-	-
80%-89% [84.5]	0%	-	-	1%	-	-	-	-	-
90%-99% [94.5]	0%	-	2%	-	-	-	-	-	6%
100% [100.0]	1%	1%	3%	-	-	-	3%	-	6%
Don't know	16%	8%	12%	22%	5%	16%	18%	26%	18%
Mean	14.89	14.06	17.79	14.46	14.06	17.93	18.88	9.18	35.92

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The UK economy

Unweighted base	505	32	22	55	29	25	15	14	15	69
Base	505	30	20	51	51	25	15	15	20	56
Much better	4%	3%	4%	4%	4%	8%	7%	6%	-	3%
Somewhat better	13%	9%	5%	21%	7%	4%	27%	-	20%	12%
About the same	10%	-	5%	6%	-	12%	-	28%	21%	6%
Somewhat worse	36%	60%	27%	43%	35%	12%	47%	29%	39%	37%
Much worse	35%	25%	54%	27%	55%	64%	19%	36%	20%	37%
Don't know	2%	3%	5%	-	-	-	-	-	-	6%
Net: Better	17%	12%	9%	25%	10%	12%	34%	6%	20%	15%
Net: Worse	72%	85%	81%	70%	90%	76%	66%	65%	59%	74%

If the government discontinued the furloughed workers scheme, what proportion of your workforce would you expect to have to let go in the three months following the scheme coming to an end?

Unweighted base	389	29	17	43	28	20	9	11	12	49
Base	396	28	16	40	49	20	9	12	16	40
0% [0]	33%	51%	33%	29%	24%	38%	54%	26%	16%	49%
1-9% [5]	16%	24%	30%	16%	22%	20%	12%	10%	51%	8%
10-19% [14.5]	12%	7%	12%	7%	18%	5%	-	10%	9%	6%
20-29% [24.5]	7%	-	-	12%	10%	-	-	8%	-	8%
30-39% [34.5]	3%	3%	-	2%	-	-	12%	-	-	8%
50-49% [44.5]	6%	-	-	12%	3%	11%	11%	-	15%	2%
50%-59% [54.5]	1%	-	-	2%	-	-	-	-	-	-
60%-69% [64.5]	1%	-	-	-	-	-	-	-	-	6%
70%-79% [74.5]	2%	-	-	2%	3%	-	-	18%	-	-
80%-89% [84.5]	0%	-	-	-	-	-	12%	-	-	-
90%-99% [94.5]	0%	-	-	-	-	-	-	-	-	-
100% [100.0]	1%	-	-	2%	-	5%	-	-	-	-
Don't know	16%	14%	24%	15%	19%	21%	-	28%	9%	12%
Mean	14.89	4.01	4.32	18.76	12.58	14.75	19.44	24.17	11.69	12.45

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All	Business size			Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	Small business	Medium business	Large business					

How effectively could your company operate if employees had to continue working from home or observing social distancing rules while on the premises (i.e. staying more than 2 metres apart)?

	Unweighted base	505	202	75	228	52	50	51	55	21
Base		505	187	76	242	51	51	51	51	20
It could operate completely effectively under these conditions		33%	37%	36%	29%	24%	27%	32%	50%	10%
It could operate largely effectively under these conditions		36%	24%	37%	44%	35%	33%	32%	36%	14%
It could operate somewhat effectively under these conditions		18%	17%	16%	20%	23%	20%	12%	13%	28%
It could not operate at all under these conditions		11%	19%	9%	6%	17%	17%	23%	-	47%
Don't know		2%	3%	1%	1%	2%	2%	2%	2%	-
Net: Could operate		87%	79%	90%	93%	81%	80%	75%	98%	53%

When it comes to business, do you think the government's response to coronavirus (COVID-19) has been...

	Unweighted base	505	202	75	228	52	50	51	55	21
Base		505	187	76	242	51	51	51	51	20
Very good		11%	11%	10%	11%	6%	12%	9%	20%	19%
Fairly good		31%	30%	35%	30%	36%	42%	38%	33%	39%
Neither good nor bad		18%	21%	16%	16%	13%	20%	16%	11%	5%
Fairly bad		21%	19%	20%	22%	26%	16%	19%	20%	29%
Very bad		19%	18%	17%	20%	19%	10%	16%	14%	5%
Don't know		1%	1%	1%	1%	-	-	2%	2%	5%
Net: Good		42%	41%	45%	41%	42%	55%	47%	53%	57%
Net: Bad		39%	37%	37%	42%	45%	26%	35%	34%	33%

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All	Industry								
	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other

How effectively could your company operate if employees had to continue working from home or observing social distancing rules while on the premises (i.e. staying more than 2 metres apart)?

Unweighted base	505	32	22	55	29	25	15	14	15	69
Base	505	30	20	51	51	25	15	15	20	56
It could operate completely effectively under these conditions	33%	31%	22%	51%	47%	28%	20%	21%	29%	27%
It could operate largely effectively under these conditions	36%	54%	46%	28%	36%	36%	20%	29%	45%	47%
It could operate somewhat effectively under these conditions	18%	16%	23%	18%	14%	25%	40%	22%	14%	16%
It could not operate at all under these conditions	11%	-	4%	-	3%	11%	21%	15%	6%	10%
Don't know	2%	-	4%	2%	-	-	-	13%	6%	-
Net: Could operate	87%	100%	92%	98%	97%	89%	79%	72%	87%	90%

When it comes to business, do you think the government's response to coronavirus (COVID-19) has been...

Unweighted base	505	32	22	55	29	25	15	14	15	69
Base	505	30	20	51	51	25	15	15	20	56
Very good	11%	12%	18%	9%	4%	16%	7%	6%	7%	9%
Fairly good	31%	32%	9%	31%	17%	23%	40%	15%	27%	32%
Neither good nor bad	18%	18%	26%	16%	24%	21%	27%	35%	19%	17%
Fairly bad	21%	23%	14%	22%	20%	12%	7%	15%	39%	20%
Very bad	19%	15%	32%	20%	35%	28%	19%	22%	7%	20%
Don't know	1%	-	-	2%	-	-	-	7%	-	1%
Net: Good	42%	44%	28%	40%	20%	39%	47%	21%	35%	41%
Net: Bad	39%	38%	46%	42%	55%	40%	26%	37%	46%	41%

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All	Business size			Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	Small business	Medium business	Large business					

Thinking about your business premises, with the exception of any caretaking/cleaning/maintenance staff, which of the following applies to your business?

	Unweighted base	Small business	Medium business	Large business	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	398	160	60	178	41	38	44	41	16
Base	399	149	61	189	40	38	43	38	16
Our business premises have remained open over the course of the Coronavirus crisis	34%	35%	21%	37%	64%	42%	48%	31%	7%
Our business premises were closed temporarily, but have since reopened	37%	34%	46%	36%	36%	43%	29%	34%	49%
Our business premises were closed and we are yet to reopen them	22%	16%	29%	24%	-	8%	7%	30%	38%
Our business premises were closed and we will never reopen them	1%	1%	-	1%	-	-	2%	3%	-
Don't know	0%	1%	1%	-	-	-	-	-	-
Not applicable - We do not have any business premises	6%	14%	3%	1%	-	8%	13%	2%	6%

Thinking about when you reopened your business premises, which of the following best describes your policy for staff?

	Unweighted base	Small business	Medium business	Large business	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	149	54	29	66	15	16	13	14	8
Base	147	50	28	69	15	16	13	13	8
It is compulsory for all staff to return to work on the business premises again	21%	32%	20%	14%	40%	30%	23%	14%	60%
Staff are able to continue working from home should they wish	77%	62%	80%	86%	61%	70%	70%	86%	28%
Don't know	2%	6%	-	-	-	-	7%	-	12%

Once you are able to start reopening your business premises, what will your policy most likely be?

	Unweighted base	Small business	Medium business	Large business	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	81	26	16	39	-	3	3	12	6
Base	86	23	17	45	-	3	3	11	6
Make it compulsory for staff to return to working on the premises	3%	12%	-	-	-	-	-	-	17%
Allow staff to continue to work from home should they wish	92%	76%	100%	98%	-	100%	100%	100%	51%
Don't know	5%	12%	-	2%	-	-	-	-	32%

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All	Industry								
	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other

Thinking about your business premises, with the exception of any caretaking/cleaning/maintenance staff, which of the following applies to your business?

	Unweighted base	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other
	398	25	18	46	23	18	11	12	13	52
Base	399	24	17	42	40	18	11	13	18	42
Our business premises have remained open over the course of the Coronavirus crisis	34%	15%	21%	11%	26%	49%	39%	51%	23%	36%
Our business premises were closed temporarily, but have since reopened	37%	44%	51%	35%	21%	28%	35%	25%	62%	43%
Our business premises were closed and we are yet to reopen them	22%	30%	23%	40%	49%	23%	18%	8%	8%	17%
Our business premises were closed and we will never reopen them	1%	-	-	-	-	-	-	-	7%	-
Don't know	0%	-	-	2%	-	-	-	-	-	2%
Not applicable - We do not have any business premises	6%	11%	5%	12%	4%	-	8%	15%	-	2%

Thinking about when you reopened your business premises, which of the following best describes your policy for staff?

	Unweighted base	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other
	149	11	9	16	5	5	4	3	8	22
Base	147	11	9	15	8	5	4	3	11	18
It is compulsory for all staff to return to work on the business premises again	21%	18%	-	7%	-	-	-	-	48%	18%
Staff are able to continue working from home should they wish	77%	82%	100%	93%	100%	100%	100%	66%	52%	82%
Don't know	2%	-	-	-	-	-	-	34%	-	-

Once you are able to start reopening your business premises, what will your policy most likely be?

	Unweighted base	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other
	81	7	4	18	11	4	2	1	1	9
Base	86	7	4	17	20	4	2	1	1	7
Make it compulsory for staff to return to working on the premises	3%	14%	-	-	-	-	-	-	-	10%
Allow staff to continue to work from home should they wish	92%	86%	100%	100%	100%	74%	55%	100%	100%	90%
Don't know	5%	-	-	-	-	26%	45%	-	-	-

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All	Business size			Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	Small business	Medium business	Large business					

You said that your business will never reopen its premises. Why is that?

	Unweighted base	Small business	Medium business	Large business	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	3	1	-	2	-	-	1	1	-
	3	1	-	2	-	-	1	1	-
The business is closing down	29%	-	-	47%	-	-	100%	-	-
The premises are not necessary for continued operation even after the Coronavirus crisis is over	71%	100%	-	53%	-	-	-	100%	-
Something else	-	-	-	-	-	-	-	-	-
Don't know	-	-	-	-	-	-	-	-	-

Prior to the Coronavirus crisis, were staff at your business allowed to work from home? If so, how many did so at least on occasion?

	Unweighted base	Small business	Medium business	Large business	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	398	160	60	178	41	38	44	41	16
	399	149	61	189	40	38	43	38	16
Staff were allowed to work from home, and all or almost all of them did	22%	26%	15%	22%	15%	22%	18%	36%	-
Staff were allowed to work from home, and most of them did	12%	8%	16%	14%	22%	14%	6%	8%	-
Staff were allowed to work from home, and some of them did	40%	33%	45%	44%	29%	34%	33%	40%	26%
Staff were not allowed to work from home	24%	30%	23%	19%	33%	31%	36%	16%	63%
Don't know	2%	4%	1%	1%	-	-	7%	-	12%

And how many of your company's staff have been working from home since the beginning of the Coronavirus crisis?

	Unweighted base	Small business	Medium business	Large business	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	398	160	60	178	41	38	44	41	16
	399	149	61	189	40	38	43	38	16
All or almost all of them	45%	42%	52%	46%	10%	27%	20%	68%	14%
Most of them	20%	13%	18%	26%	20%	25%	18%	25%	6%
Some of them	24%	21%	29%	24%	56%	29%	38%	7%	26%
None of them	10%	21%	2%	4%	14%	17%	20%	-	42%
Don't know	1%	3%	-	-	-	2%	4%	-	12%

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All	Industry								
	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other

You said that your business will never reopen its premises. Why is that?

Unweighted base	3	-	-	-	-	-	-	-	1	-
Base	3	-	-	-	-	-	-	-	1	-
The business is closing down	29%	-	-	-	-	-	-	-	-	-
The premises are not necessary for continued operation even after the Coronavirus crisis is over	71%	-	-	-	-	-	-	-	100%	-
Something else	-	-	-	-	-	-	-	-	-	-
Don't know	-	-	-	-	-	-	-	-	-	-

Prior to the Coronavirus crisis, were staff at your business allowed to work from home? If so, how many did so at least on occasion?

Unweighted base	398	25	18	46	23	18	11	12	13	52
Base	399	24	17	42	40	18	11	13	18	42
Staff were allowed to work from home, and all or almost all of them did	22%	16%	22%	41%	17%	40%	17%	15%	15%	19%
Staff were allowed to work from home, and most of them did	12%	8%	11%	9%	27%	11%	8%	9%	8%	10%
Staff were allowed to work from home, and some of them did	40%	57%	62%	44%	49%	26%	38%	26%	45%	46%
Staff were not allowed to work from home	24%	16%	-	6%	8%	22%	37%	41%	33%	23%
Don't know	2%	4%	5%	-	-	-	-	9%	-	2%

And how many of your company's staff have been working from home since the beginning of the Coronavirus crisis?

Unweighted base	398	25	18	46	23	18	11	12	13	52
Base	399	24	17	42	40	18	11	13	18	42
All or almost all of them	45%	50%	68%	75%	82%	50%	52%	25%	40%	40%
Most of them	20%	19%	17%	20%	13%	23%	-	9%	30%	28%
Some of them	24%	28%	15%	2%	4%	21%	39%	33%	16%	26%
None of them	10%	4%	-	2%	-	6%	9%	33%	14%	5%
Don't know	1%	-	-	-	-	-	-	-	-	-

YouGov - business leaders survey

505 director-level staff or higher in the private sector

Fieldwork Dates: 5th - 24th August 2020

All	Business size			Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	Small business	Medium business	Large business					

And which of the following comes closest to your view?

	Unweighted base	Small business	Medium business	Large business	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure
	398	160	60	178	41	38	44	41	16
Base	399	149	61	189	40	38	43	38	16
Before Coronavirus I was sceptical that staff could/would work effectively from home, and I still am	16%	23%	14%	10%	29%	31%	15%	10%	18%
Before Coronavirus I was sceptical that staff could/would work effectively from home, but now I believe they can	25%	17%	31%	30%	26%	27%	27%	34%	13%
Before Coronavirus I was convinced that staff could/would work effectively from home, and I still am	49%	45%	47%	53%	35%	27%	35%	56%	45%
Before Coronavirus I was convinced that staff could/would work effectively from home, but now I am not	3%	3%	5%	3%	2%	10%	2%	-	-
Don't know	7%	12%	3%	4%	7%	5%	21%	-	23%

YouGov - business leaders survey

505 director-level staff or higher in the private sector

Fieldwork Dates: 5th - 24th August 2020

All	Industry								
	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other

And which of the following comes closest to your view?

	Unweighted base	Accountancy	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other
	398	25	18	46	23	18	11	12	13	52
Base	399	24	17	42	40	18	11	13	18	42
Before Coronavirus I was sceptical that staff could/would work effectively from home, and I still am	16%	16%	11%	5%	12%	11%	19%	9%	22%	11%
Before Coronavirus I was sceptical that staff could/would work effectively from home, but now I believe they can	25%	27%	23%	22%	34%	23%	10%	-	39%	19%
Before Coronavirus I was convinced that staff could/would work effectively from home, and I still am	49%	56%	50%	67%	54%	61%	71%	59%	32%	57%
Before Coronavirus I was convinced that staff could/would work effectively from home, but now I am not	3%	-	11%	2%	-	-	-	8%	-	8%
Don't know	7%	-	5%	4%	-	6%	-	24%	7%	5%