

YouGov Survey Results

Sample: 509 senior business leaders in the UK

Fieldwork: 22nd May - 7th June 2020



Total	Size of business			Industry							
	Small	Medium	Large	Manufacturing	Construction	Retail	Financial services	Hospitality and leisure	Accountancy	Legal	

Now, thinking about what your business might look like in one years' time, what do you think are the most likely outcomes for your business, compared with the time before lockdown started in March 2020? Please select the option on each row that you think best describes the most likely outcome for your business in each scenario.

We will offer fewer products/ services | We will offer more products/ services

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	14%	8%	21%	17%	17%	16%	17%	13%	14%	6%	14%
	56%	63%	52%	52%	52%	61%	52%	56%	73%	67%	86%
>>>	30%	29%	27%	32%	31%	24%	31%	31%	14%	28%	-

We will employ fewer staff | We will employ more staff

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	42%	28%	49%	51%	50%	45%	44%	46%	45%	28%	36%
	42%	52%	35%	36%	38%	41%	35%	37%	50%	39%	64%
>>>	16%	20%	16%	13%	12%	14%	21%	17%	5%	33%	-

Less online sales and marketing | More online sales and marketing

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	8%	7%	7%	9%	6%	8%	8%	2%	9%	-	14%
	51%	60%	48%	45%	46%	67%	35%	52%	50%	72%	50%
>>>	41%	32%	44%	46%	48%	25%	58%	46%	41%	28%	36%

Less need for physical space (e.g. premises, office space/ services) | More need for physical space (e.g. premises, office space/ services)

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	41%	28%	40%	52%	15%	39%	33%	67%	14%	67%	71%
	47%	60%	48%	36%	73%	51%	50%	27%	64%	28%	21%
>>>	12%	12%	12%	12%	12%	10%	17%	6%	23%	6%	7%

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Total							Borrowed from the Govt schemes		Impact of COVID-19 on your business		
	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Yes	No	Positive	Negative	No difference

Now, thinking about what your business might look like in one years' time, what do you think are the most likely outcomes for your business, compared with the time before lockdown started in March 2020? Please select the option on each row that you think best describes the most likely outcome for your business in each scenario.

We will offer fewer products/ services|We will offer more products/ services

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	14%	17%	16%	5%	27%	15%	20%	17%	15%	-	-	-
	56%	40%	45%	38%	55%	45%	53%	47%	70%	-	-	-
>>>	30%	42%	39%	57%	18%	40%	27%	36%	15%	-	-	-

We will employ fewer staff|We will employ more staff

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	42%	35%	48%	14%	45%	50%	33%	40%	65%	-	-	-
	42%	37%	43%	57%	55%	45%	60%	36%	25%	-	-	-
>>>	16%	29%	9%	29%	-	5%	7%	24%	10%	-	-	-

Less online sales and marketing|More online sales and marketing

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	8%	6%	14%	14%	9%	25%	7%	12%	10%	-	-	-
	51%	46%	48%	38%	73%	50%	67%	41%	60%	-	-	-
>>>	41%	48%	39%	48%	18%	25%	27%	47%	30%	-	-	-

Less need for physical space (e.g. premises, office space/ services)|More need for physical space (e.g. premises, office space/ services)

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	41%	46%	64%	33%	27%	50%	20%	31%	45%	-	-	-
	47%	38%	30%	48%	55%	40%	67%	44%	40%	-	-	-
>>>	12%	15%	7%	19%	18%	10%	13%	26%	15%	-	-	-

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REP9_5. We will have a shorter supply chain|We will have a longer supply chain

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	14%	10%	14%	17%	17%	12%	13%	12%	9%	-	21%
	80%	83%	80%	78%	75%	78%	77%	87%	91%	100%	79%
>>>	6%	7%	6%	5%	8%	10%	10%	2%	-	-	-

REP9_6. We will have lower supply costs|We will have higher supply costs

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	14%	9%	16%	19%	12%	16%	8%	13%	5%	17%	14%
	65%	73%	51%	64%	44%	63%	67%	73%	77%	78%	71%
>>>	20%	18%	33%	18%	44%	22%	25%	13%	18%	6%	14%

We will be sourcing less from local/British suppliers|We will be sourcing more from local/British suppliers

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	7%	5%	6%	8%	12%	6%	2%	8%	-	11%	7%
	73%	77%	72%	69%	63%	71%	65%	77%	82%	78%	79%
>>>	21%	18%	22%	23%	25%	24%	33%	15%	18%	11%	14%

We will take out less insurance cover|We will take out more insurance cover

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	6%	8%	5%	5%	2%	8%	6%	4%	5%	11%	14%
	82%	82%	84%	82%	88%	80%	85%	83%	86%	89%	64%
>>>	12%	10%	11%	13%	10%	12%	10%	13%	9%	-	21%

We will have lower growth expectations|We will have higher growth expectations

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	47%	42%	58%	48%	58%	55%	50%	46%	41%	33%	64%
	39%	46%	28%	36%	25%	33%	31%	40%	55%	56%	36%
>>>	15%	13%	14%	16%	17%	12%	19%	13%	5%	11%	-

Less use of online systems and software (e.g. finance, HR)|More use of online systems and software (e.g. finance, HR)

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	4%	5%	2%	3%	4%	4%	6%	-	5%	-	7%
	48%	64%	47%	35%	63%	49%	46%	37%	59%	39%	36%
>>>	48%	31%	51%	61%	33%	47%	48%	63%	36%	61%	57%

Fewer employees working from home|An increase in employees working from home

Base	509	197	81	231	52	51	52	52	22	18	14
<<<	7%	9%	9%	6%	10%	8%	10%	4%	9%	11%	-
	33%	51%	27%	19%	37%	31%	48%	23%	64%	17%	43%
>>>	60%	40%	64%	75%	54%	61%	42%	73%	27%	72%	57%

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REP9_5. We will have a shorter supply chain|We will have a longer supply chain

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	14%	12%	25%	10%	9%	20%	20%	18%	30%	-	-	-
	80%	81%	75%	81%	91%	75%	73%	74%	65%	-	-	-
>>>	6%	8%	-	10%	-	5%	7%	8%	5%	-	-	-

REP9_6. We will have lower supply costs|We will have higher supply costs

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	14%	13%	25%	10%	9%	15%	33%	22%	20%	-	-	-
	65%	71%	61%	62%	82%	70%	53%	53%	50%	-	-	-
>>>	20%	15%	14%	29%	9%	15%	13%	26%	30%	-	-	-

We will be sourcing less from local/British suppliers|We will be sourcing more from local/British suppliers

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<<<	7%	8%	11%	14%	9%	5%	13%	9%	15%	-	-	-
	73%	65%	77%	62%	91%	75%	53%	62%	70%	-	-	-
>>>	21%	27%	11%	24%	-	20%	33%	29%	15%	-	-	-

We will take out less insurance cover|We will take out more insurance cover

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	6%	12%	2%	5%	9%	5%	-	14%	5%	-	-	-
	82%	77%	91%	67%	91%	75%	100%	69%	80%	-	-	-
>>>	12%	12%	7%	29%	-	20%	-	17%	15%	-	-	-

We will have lower growth expectations|We will have higher growth expectations

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	47%	40%	52%	29%	64%	40%	47%	46%	60%	-	-	-
	39%	40%	32%	43%	27%	40%	33%	35%	30%	-	-	-
>>>	15%	19%	16%	29%	9%	20%	20%	19%	10%	-	-	-

Less use of online systems and software (e.g. finance, HR)|More use of online systems and software (e.g. finance, HR)

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	4%	4%	5%	5%	-	5%	7%	8%	-	-	-	-
	48%	42%	41%	38%	64%	50%	73%	47%	60%	-	-	-
>>>	48%	54%	55%	57%	36%	45%	20%	45%	40%	-	-	-

Fewer employees working from home|An increase in employees working from home

Base	509	52	44	21	11	20	15	78	20	-	-	-
<<<	7%	6%	-	14%	9%	20%	-	5%	10%	-	-	-
	33%	23%	7%	24%	55%	35%	47%	38%	35%	-	-	-
>>>	60%	71%	93%	62%	36%	45%	53%	56%	55%	-	-	-