

A photograph of a modern brick building at dusk, with a large 'UH' logo on the right side. The sky is a mix of orange, pink, and blue. A street lamp is visible in the foreground.

University of
Hertfordshire

Hertfordshire Business Productivity Survey

Interim Report

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Summary

Hertfordshire Local Enterprise Partnership and Hertfordshire Growth Hub have commissioned this productivity survey of Hertfordshire businesses, and this is the 1st stage deliverable.

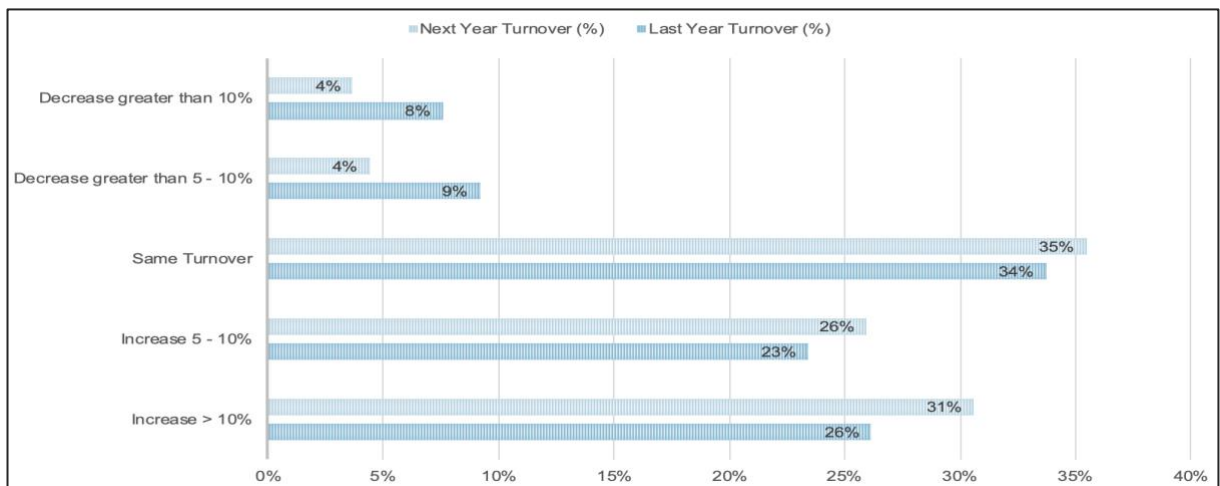
- **Fifty per cent of Hertfordshire businesses reported an increase growth in the last financial year.** Forty-four per cent had approximately the same turnover and 16 per cent had a fall in turnover.
- **Fifty-seven per cent of businesses expected turnover to increase in the next twelve months,** 35 per cent thought it remain approximately the same turnover and 8 per cent thought it would be lower.
- **Thirty-nine per cent of businesses employed more people than 12 months previously.** Forty-nine per cent employed the same number and 13 per cent employed fewer.
- **Over sixty per cent of businesses had introduced new or significantly improved, goods, services or processes in the last year.** Information, communications and technology (80 per cent) were almost twice as likely to introduce a new or significantly improved goods/services/processes than high-end logistics and retail businesses (47 per cent).
- **Thirty-two per cent of businesses had a training budget for their staff, and 29 per cent for their managers/leaders in the last year.** Thirty per cent expected to have a staff training budget, and 27 per cent a manager training budget for the next year.
- **The most commonly cited constraints on business, having a medium-to-very high impact on business performance were lack of skilled labour (31 per cent), regulations and red tape (31 per cent), high cost of labour (23 per cent) and business rates (23 per cent).**
- **Financial information was sought by professional/financial/technical service businesses (41 per cent), arts/entertainment/recreation business services (42 per cent), manufacturing/advanced engineering businesses (39 per cent) and construction/built environment businesses in the last year.**
- **In the next three years businesses identified increasing skills of their workforce as having the most impact on increasing turnover (59 per cent), contributing towards business growth (56 per cent), and increasing overall productivity (67 per cent).**

1 Business Performance

1.1 Business Performance (Turnover)

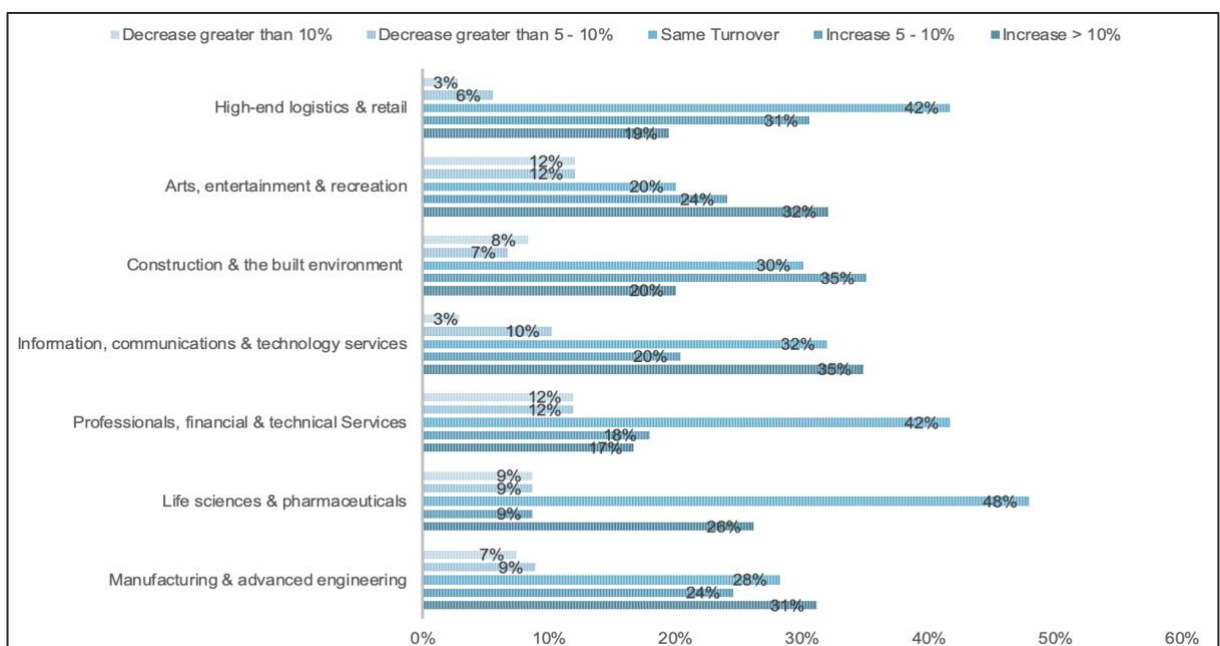
1. Fifty per cent of Hertfordshire businesses had increased their turnover in the last financial year (2018). Thirty-four per cent of businesses had approximately the same turnover and 16 per cent had decreased their turnover.
2. Fifty-seven per cent of businesses predicted an increase in turnover for the next financial year (2019). Thirty-five per cent of Hertfordshire businesses predicted the same turnover as in previous year, and 8 per cent predicted a decrease in turnover.

Figure 1.1 Changes in Hertfordshire businesses' turnover, last and next year



3. Fifty-six per cent of manufacturing/advanced engineering and arts/entertainment/recreation respondents had increased their turnover by more than 5% in the last year (2018). Against twenty-four per cent of professional/financial/technical and arts/entertainment/recreation businesses who jointly experienced a decrease of 5% or more in their last year (2018).

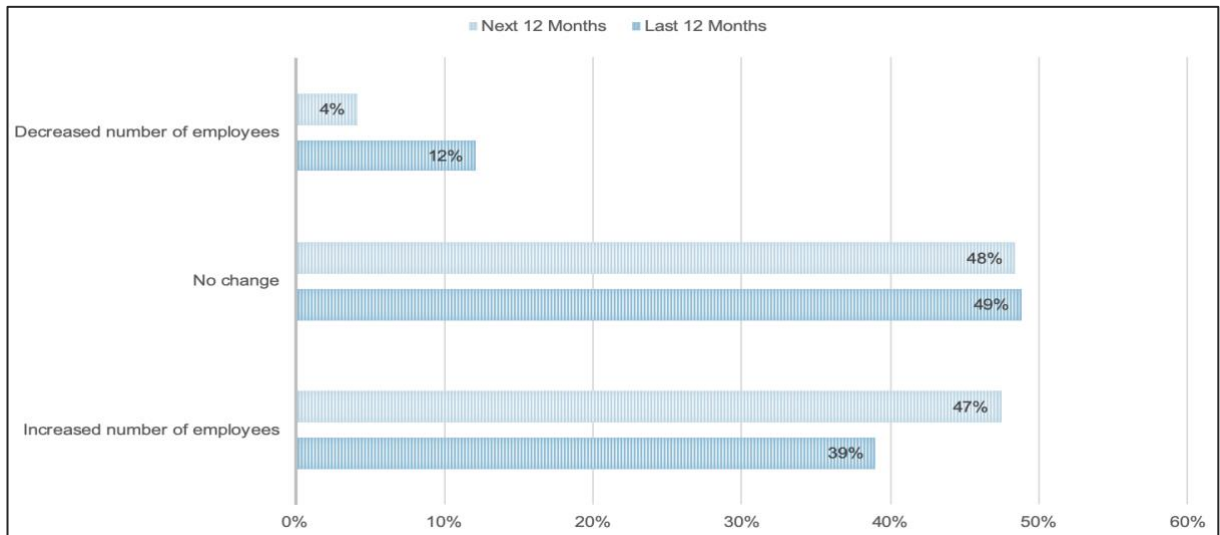
Figure 1.2 Changes in Hertfordshire businesses' last years' turnover, by sector



1.2 Expectations for employment growth

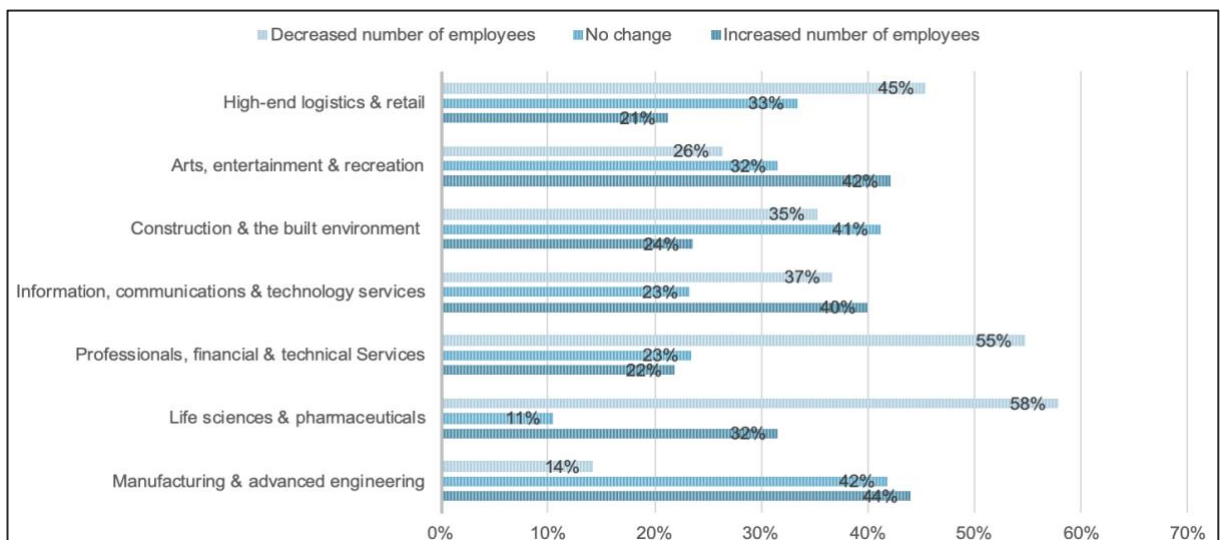
4. Thirty-nine per cent of businesses employed more people than a year ago (2018). Forty-nine per cent of businesses employed the same number of people and 13 per cent had a decrease in the number of people employed.
5. Forty-seven per cent of businesses predicted they would employ more people in the next year (2019). Forty-nine per cent of businesses predicted they would employ the same number and 4 per cent predicted they would decrease the number of people employed.

Figure 1.3 Levels of Hertfordshire business respondent's employment last (2018) and next year (2019)



6. In the last year, manufacturing/advanced engineering, arts/entertainment/recreation, and construction/built environment had the strongest increase in levels of employment (44 per cent, 42 per cent and 41 per cent respectively). Life sciences/pharmaceuticals (fifty-eight per cent), professional/financial/technical services (55 per cent), and high-end logistics/retail (45 per cent) sectors had significant decreases in the level of employment.

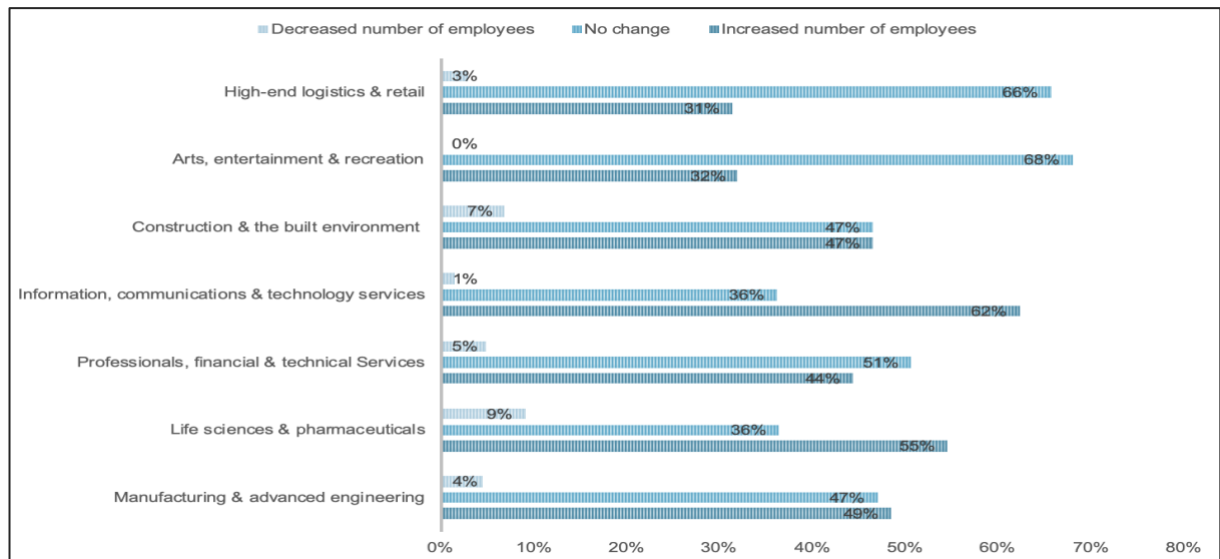
Figure 1.4 Levels of Hertfordshire business respondent's employment last year (2018), by sector



7. The top employers predicting significant increases in the level employment are information/communications/technology services (62 per cent), life sciences/pharmaceuticals

(55 per cent), manufacturing/advanced engineering (49 per cent), and construction/built environment (47 per cent).

Figure 1.5 Levels of Hertfordshire business respondent's predictive employment next year (2018), by sector

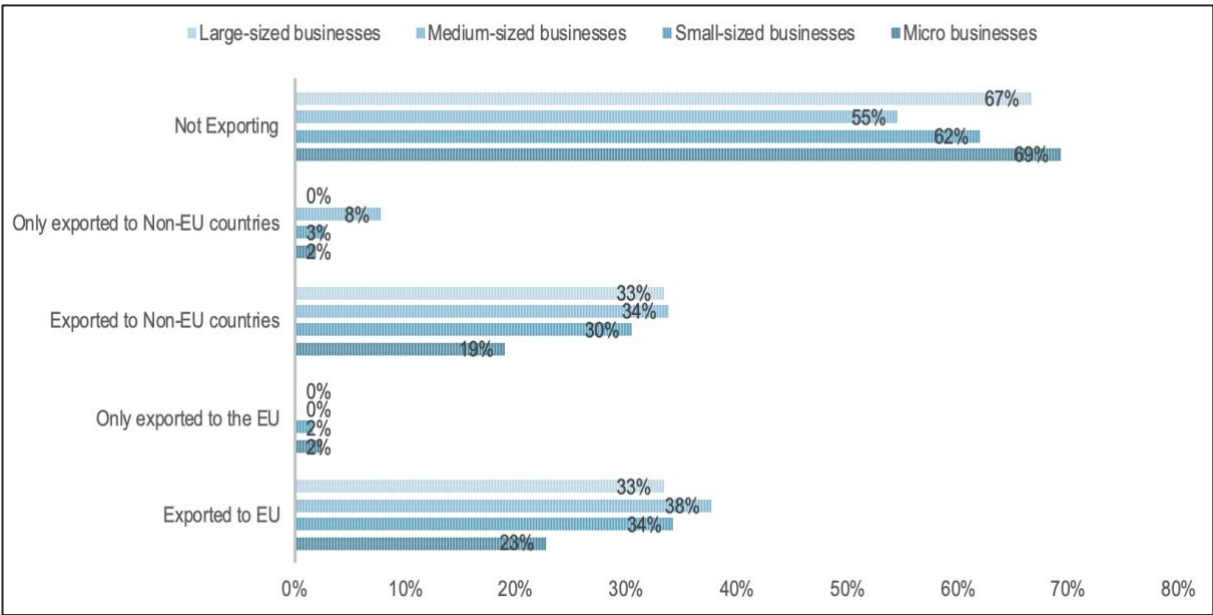


2 Exporting

2.1 Sales of goods or services outside the UK

- 8. Nearly sixty-three per cent of Hertfordshire businesses had not exported goods or services in the last year (2018). Sixty-nine per cent of micro-businesses, 62 per cent of small-sized businesses, 55 per cent of medium-sized businesses and 67 per cent of large businesses had not-exported goods or services in the last year.
- 9. Of the businesses who had exported goods and services in the last year, eighty-four per cent exported to EU countries and 74 per cent exported to non-EU countries.

Figure 2.1 Hertfordshire businesses exports to EU and Non-EU countries, by size

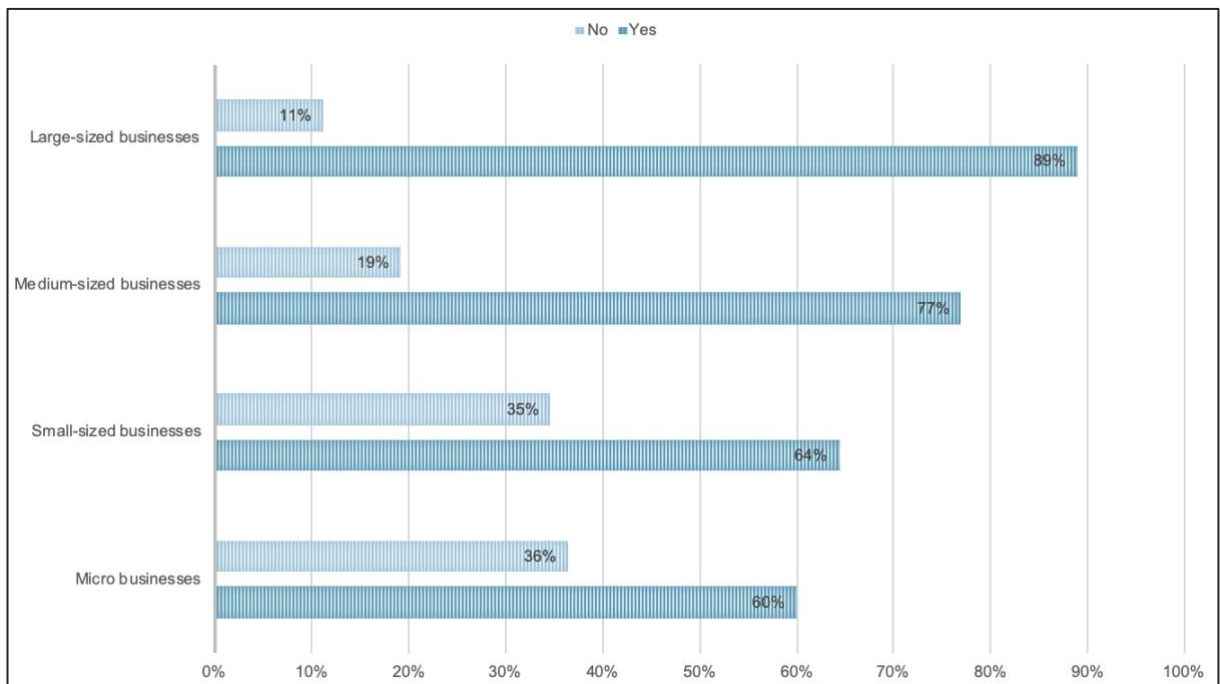


3 Innovation activity

3.1 Businesses that had new or significantly improved goods, services or processes

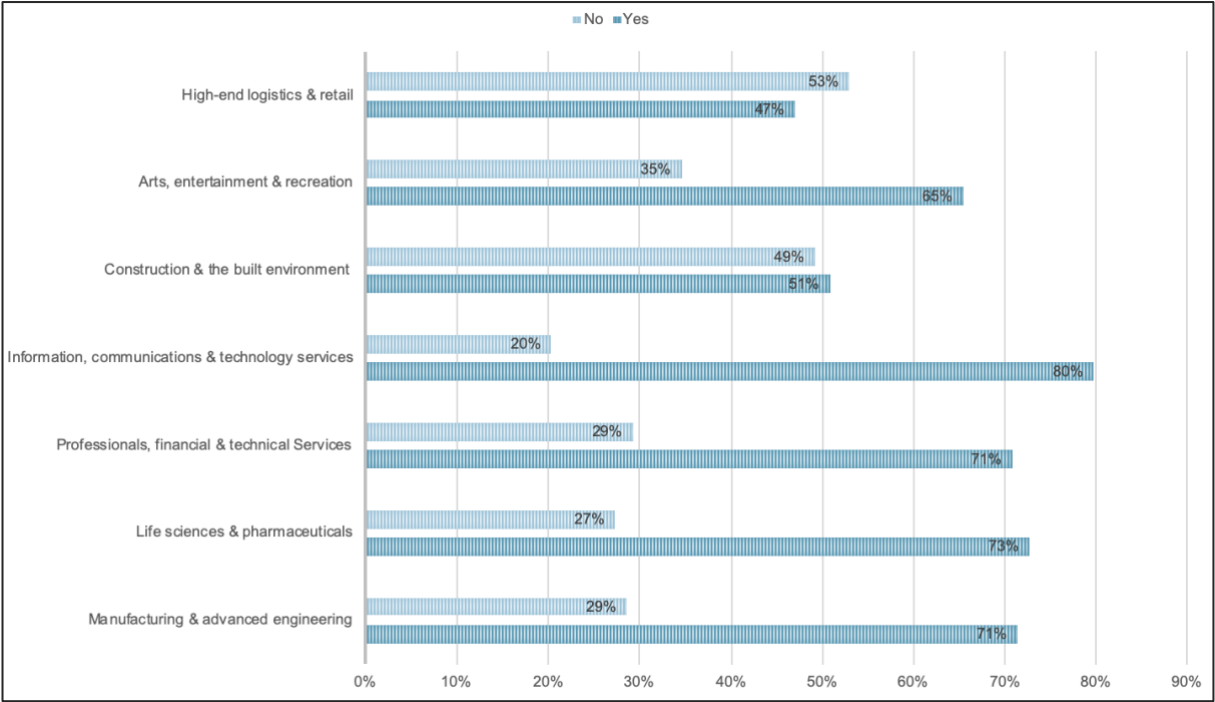
10. Over sixty-five per cent of Hertfordshire businesses had developed and introduced new goods, services or processes in the last three years. Micro-businesses (60 per cent), small businesses (64 per cent), medium-sized businesses (77 per cent) and large businesses (89 per cent) had introduced new goods, services or processes in the last three years.

Figure 3.1 Hertfordshire businesses who had new or significantly improved goods, services or processes in the last year, by business size



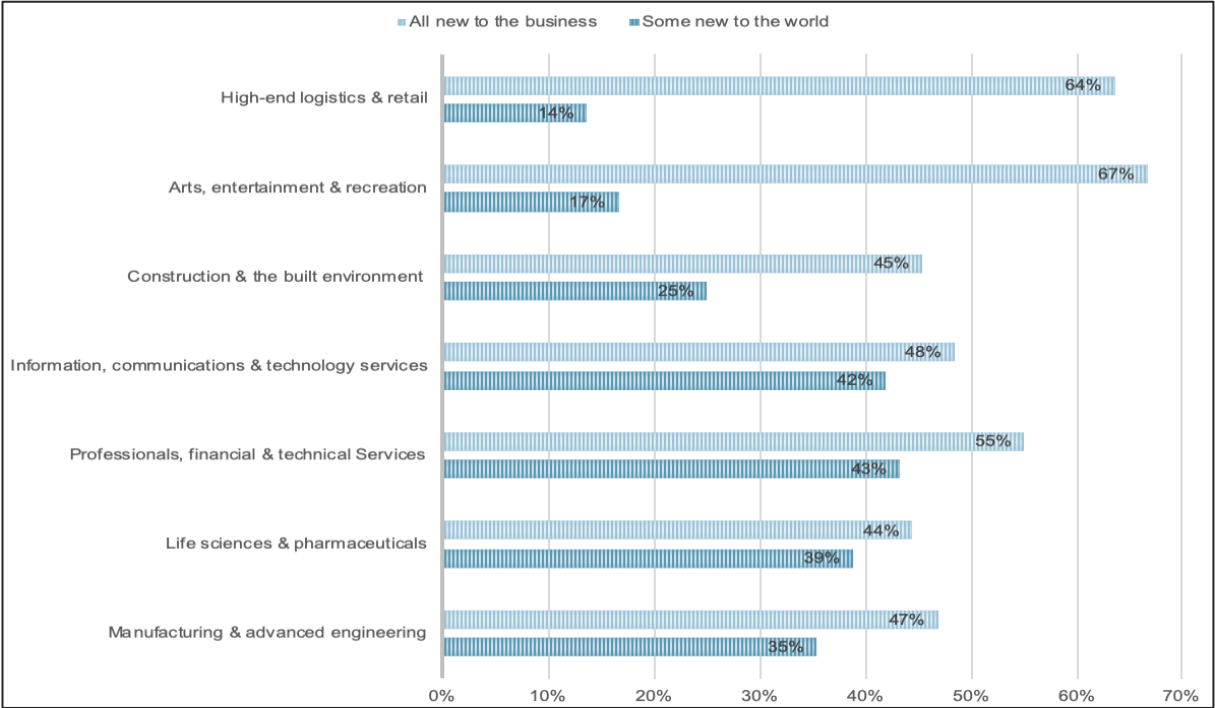
11. By sector, the proportion of Hertfordshire businesses that had introduced any new or significantly improved goods, services or processes in the last year was highest in information/communications and technology (80 per cent, followed by life sciences/pharmaceuticals (73 per cent) and manufacturing/advanced engineering (71 per cent), and the lowest was construction/built environment (51 per cent) and high-end logistics/retail (47 per cent).

Figure 3.2 Hertfordshire businesses who had new or significantly improved goods, services or processes in the last year, by sector



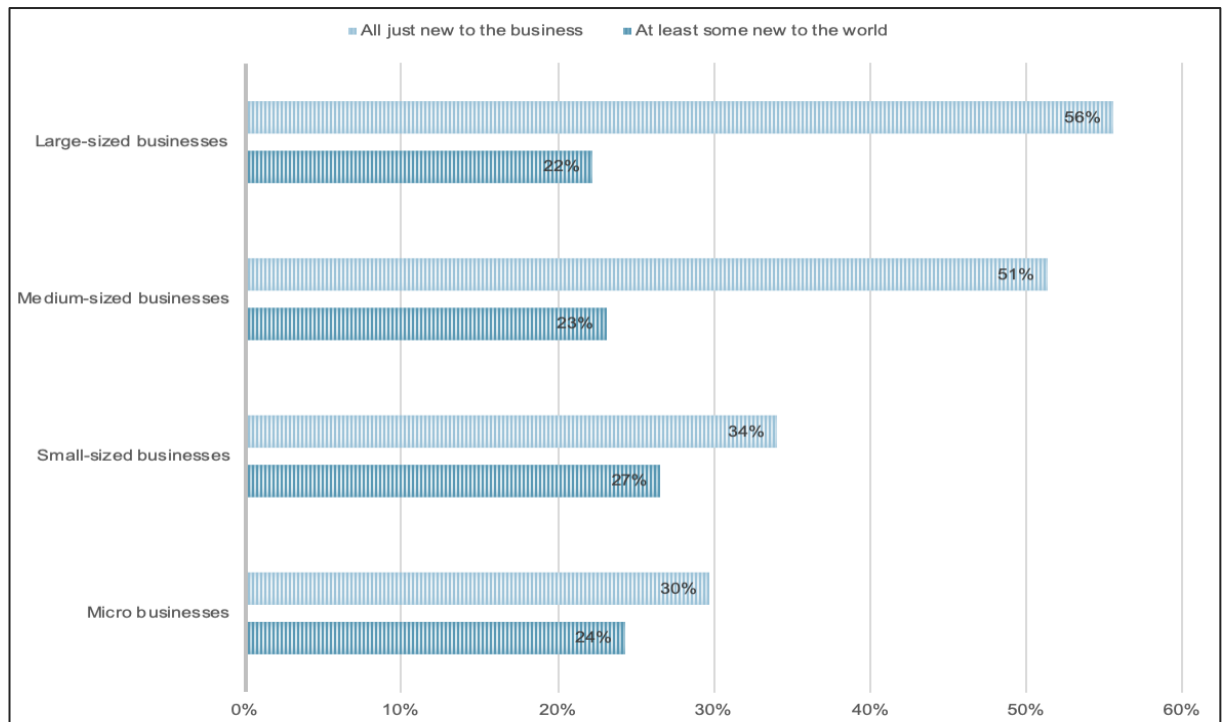
12. Hertfordshire businesses that had introduced goods, services and processes that were new-to-the-world were most likely in information/communication/technological services (42 per cent), professional/financial/technical services (43 per cent), life sciences/pharmaceutical (39 per cent) and manufacturing/advanced engineering (35 per cent).

Figure 3.3 Hertfordshire businesses who had either new-to-the-world or new-to-business improved goods, services or processes in the last year, by sector



13. Twenty-five per cent of the SME respondents had introduced goods, services or processes that were new-to-the-world. Highest proportion introducing new-to-the world goods, services or processes were small-businesses (27 per cent), followed by micro-businesses (24 per cent).

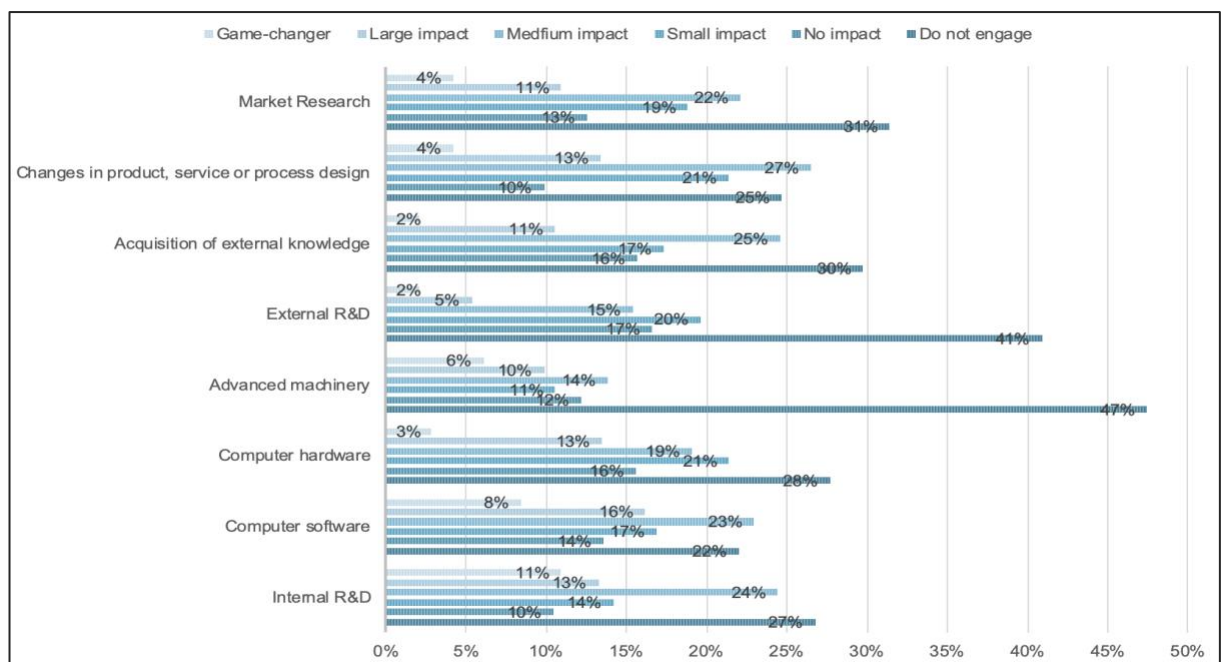
Figure 3.4 Hertfordshire businesses who had either new-to-the-world or new-to-business improved goods, services or processes in the last year, by business size



3.2 Businesses innovative activity

14. The top ranked innovation activities reported by Hertfordshire businesses that had significant impact on their businesses were internal R&D (49 per cent), computer software (48 per cent), changes in goods, services and process design (44 per cent), and acquisition of external knowledge (37 per cent).

Figure 3.5 Hertfordshire businesses innovation activities, and the reported impact on business growth, turnover and productivity

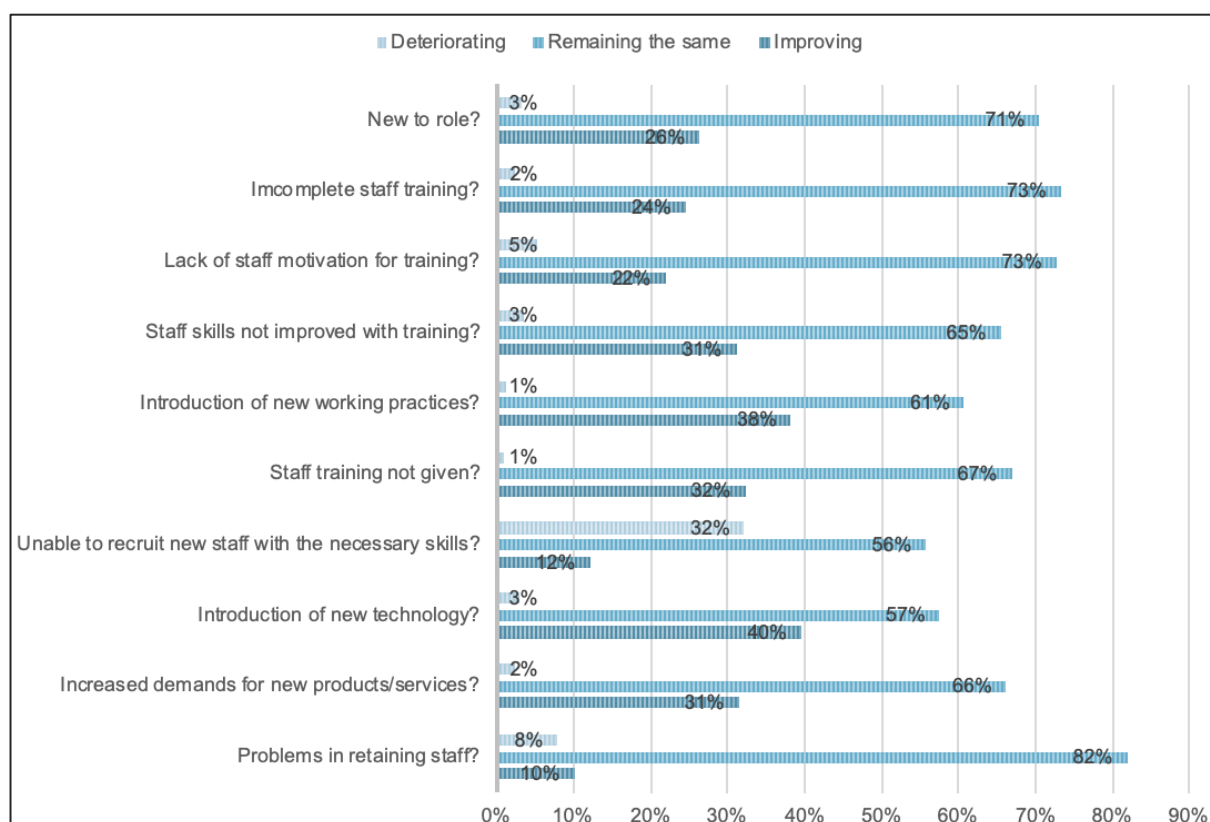


4 Skills and Training

4.1 Skills gaps in workforce and leadership & management

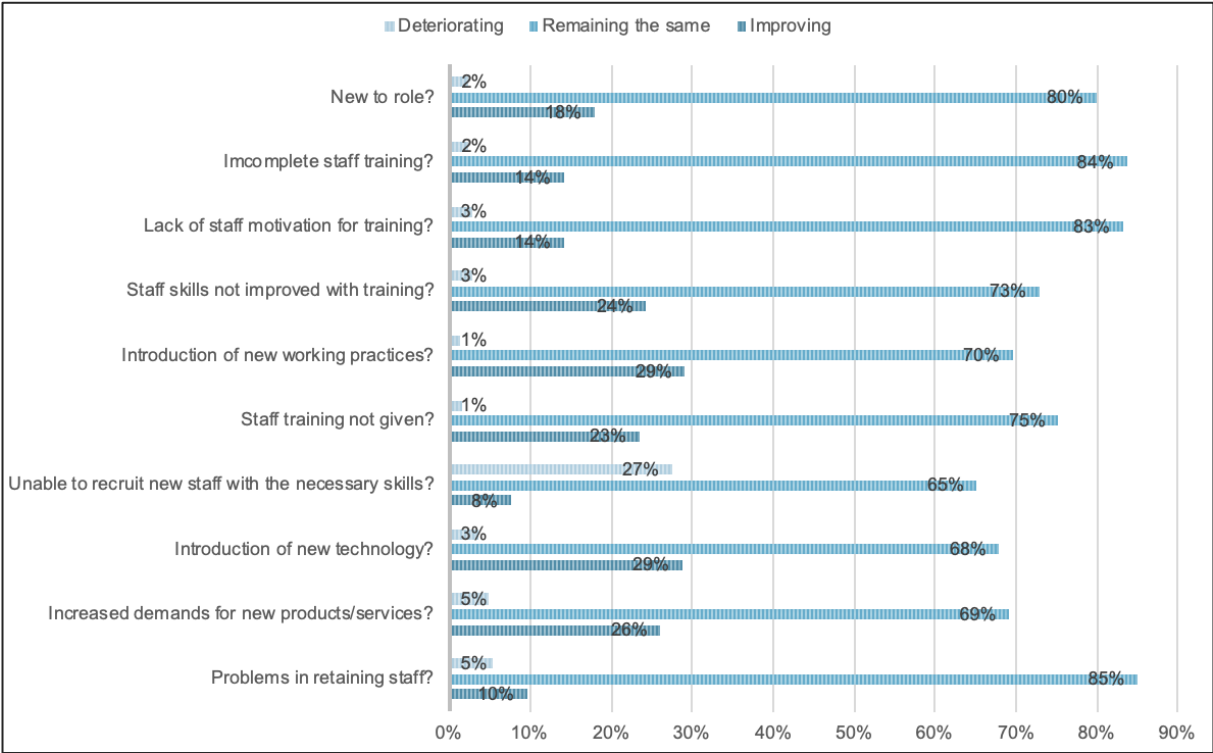
15. For those businesses who have staff skills gaps, the highest reasons for the skills gaps are problems in retaining staff (96 per cent), increased demands for new goods/services/process (94 per cent), Unable to recruit new staff with the necessary skills (94 per cent), introduction of new technology (93 per cent), introduction of new working practices (92 per cent), and the lowest was new to role (86 per cent).
16. Those Hertfordshire businesses who reported a skills gap, forty per cent identified the introduction of new technology, 38 per cent identified introduction of new working practices, 32 per cent identified increasing demand for new goods, services and processes, 32 per cent identified lack of staff training, and staff skills not improved with training as the situation has improved.

Figure 4.1 Common reasons for reported skills gaps, and improvement or deterioration in the last year



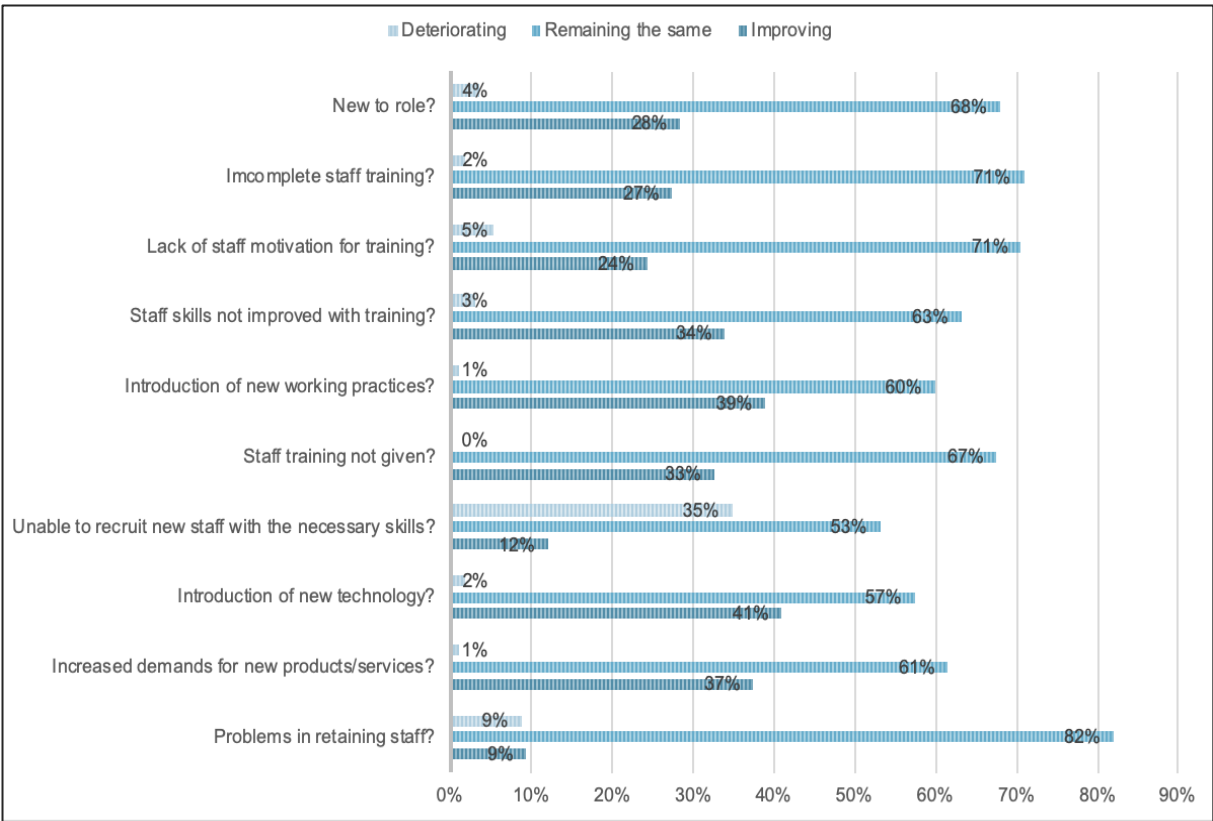
17. Ability to access new staff with the necessary skills is a continuing problem for micro-businesses with twenty-seven per cent reporting a deterioration in this reason for skills gaps. Whereas skills gaps associated with introducing new working practices (29 per cent), introduction of new technology (29 per cent) and increased demands for new goods, services and processes (26 per cent) is improving over the last year.

Figure 4.2 Hertfordshire micro businesses' reasons for staff skills gaps, is it improving?



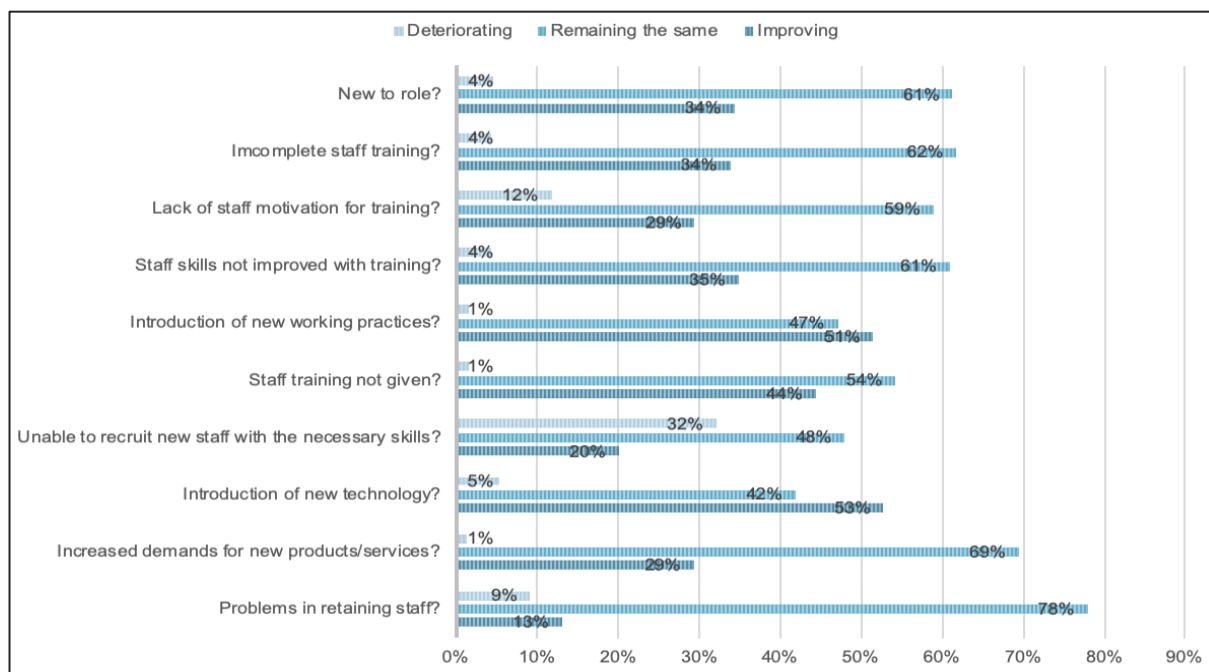
18. The top challenges around Hertfordshire small-business staff skills gaps are in problems of retaining staff (97 per cent), increased demands for goods/services/processes (95 per cent), introduction of new technology (94 per cent), and inability to recruit new staff with the necessary skills (93 per cent). This final reason for small businesses' skills gaps was noted by our respondents as getting progressively worse in the last year (35 per cent).

Figure 4.3 Hertfordshire small-sized businesses' reasons for staff skills gaps, is it improving?



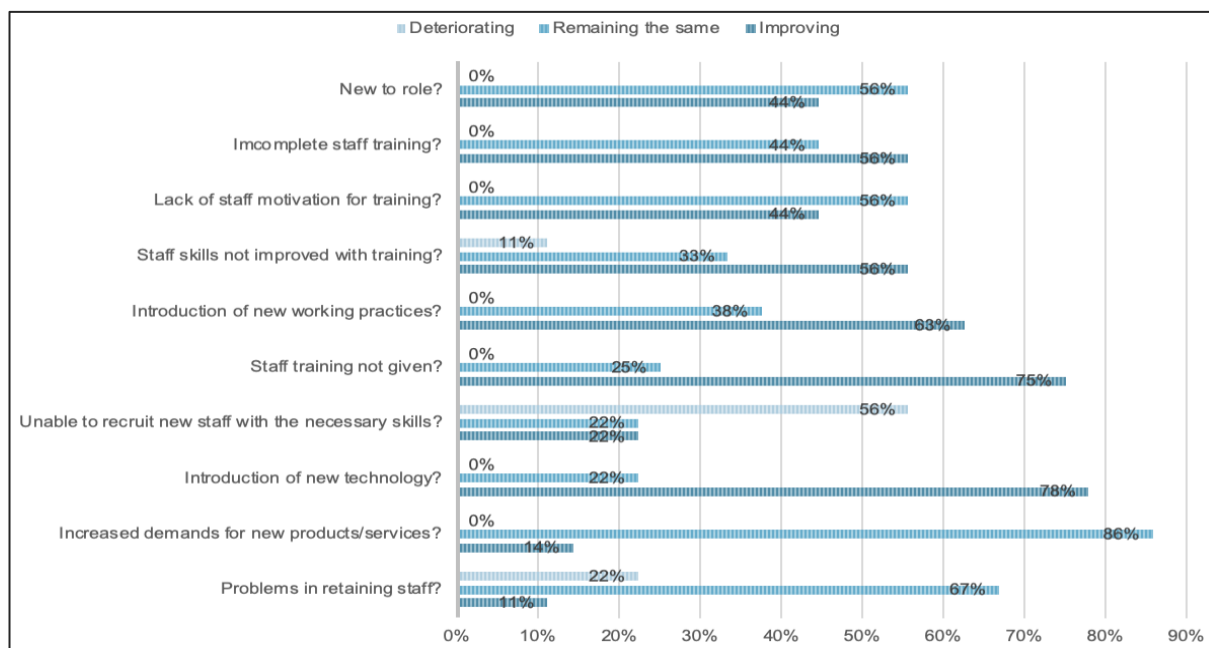
19. For Hertfordshire's medium-sized businesses the top four reasons for their current staff skills gaps are problems in retaining staff (99 per cent), increased demands for new goods/services/processes (96 per cent), inability to recruit new staff with the necessary skills (96 per cent), and introduction of new technology. Again, like the small business sector inability to recruit new staff with the necessary skills has significantly deteriorated for the medium-sized business over the last year (32 per cent).

Figure 4.4 Hertfordshire medium-sized businesses' reasons for staff skills gaps, is it improving?



20. Hertfordshire large businesses reported staff skills gaps in all areas, but particularly a deteriorating situation in the inability to recruit new staff with the necessary skills over the last year (56 per cent). Hertfordshire large businesses did also report an improved staff skills over the last year in increasing overall staff training (seventy-five per cent), introduction of new technology (78 per cent), introduction of new working practices (63 per cent), and overall improvement of staff skills after training completed.

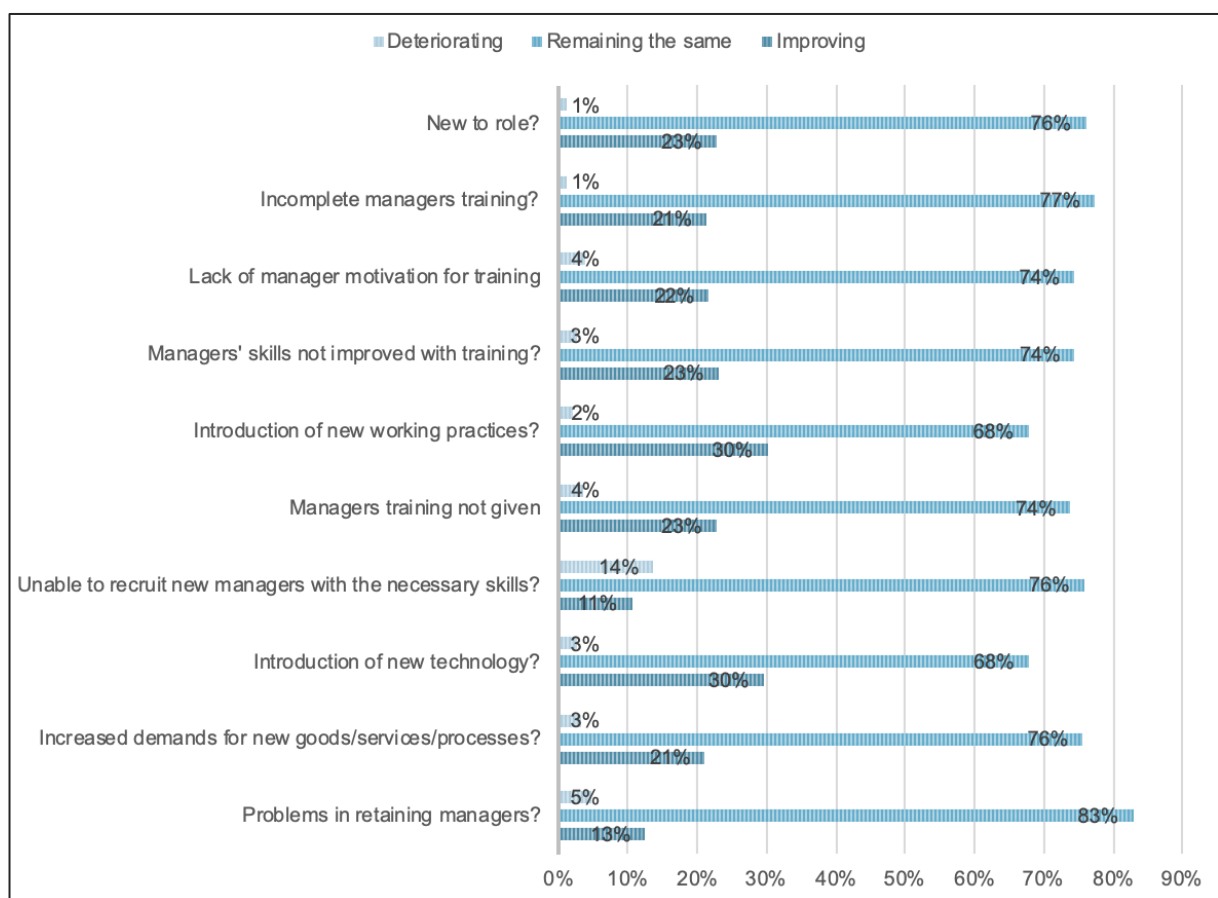
Figure 4.5 Hertfordshire large-sized businesses' reasons for staff skills gaps, is it improving?



4.1.1 Hertfordshire managers/leaders' reasons for skills gaps

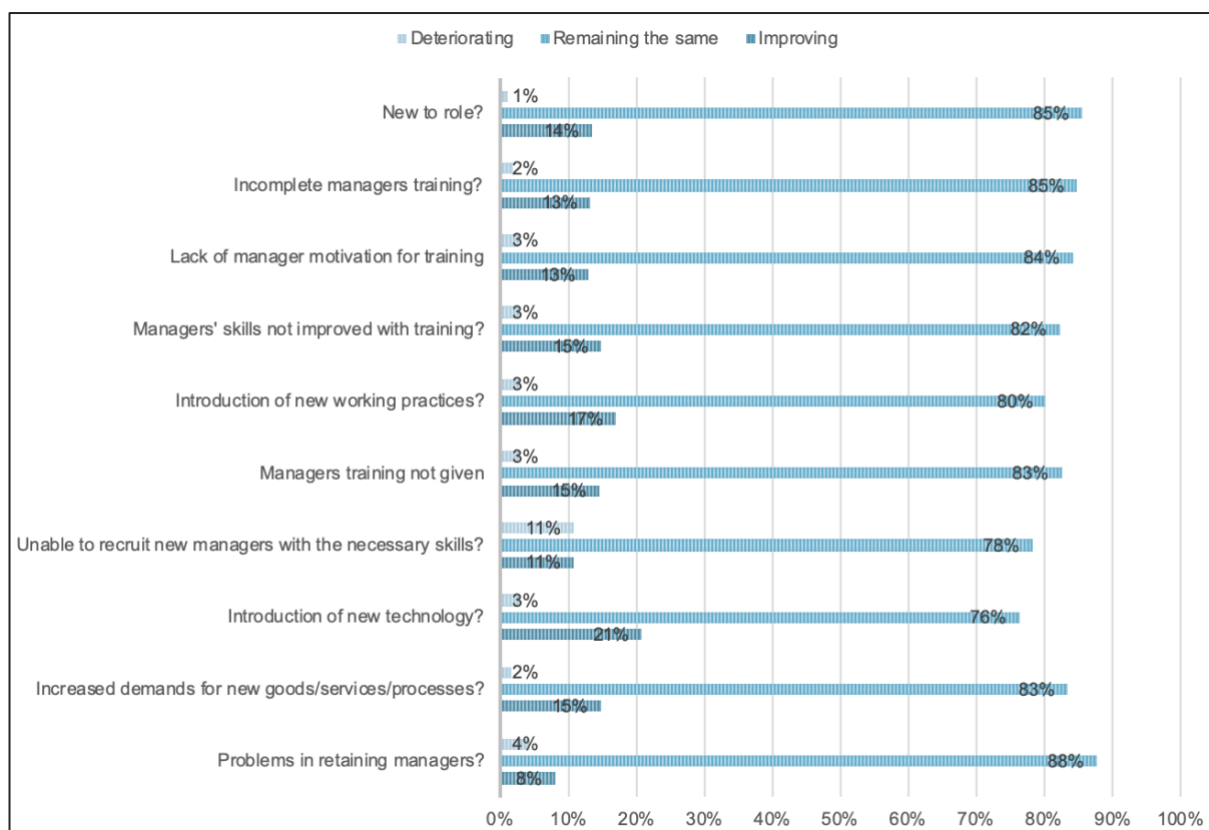
21. Hertfordshire businesses ranked the following reasons as contributory towards their overall managers/leaders skills gaps: problems in retaining their existing managers (84 per cent), increased demands for new goods, services and processes (82 per cent), introduction of new technology (82 per cent), and unable to recruit new managers with the necessary skills (81 per cent).
22. Of those managers/leaders' skill gaps reported, Hertfordshire businesses reported an improvement of the last year in managers' skills handling the introduction of new technology (30 per cent), introduction of new working practices (30 per cent), being trained and seeing an improvement in their skills (23 per cent).

Figure 4.6 Common reasons for reported managers' skills gaps, and improvement or deterioration in last year



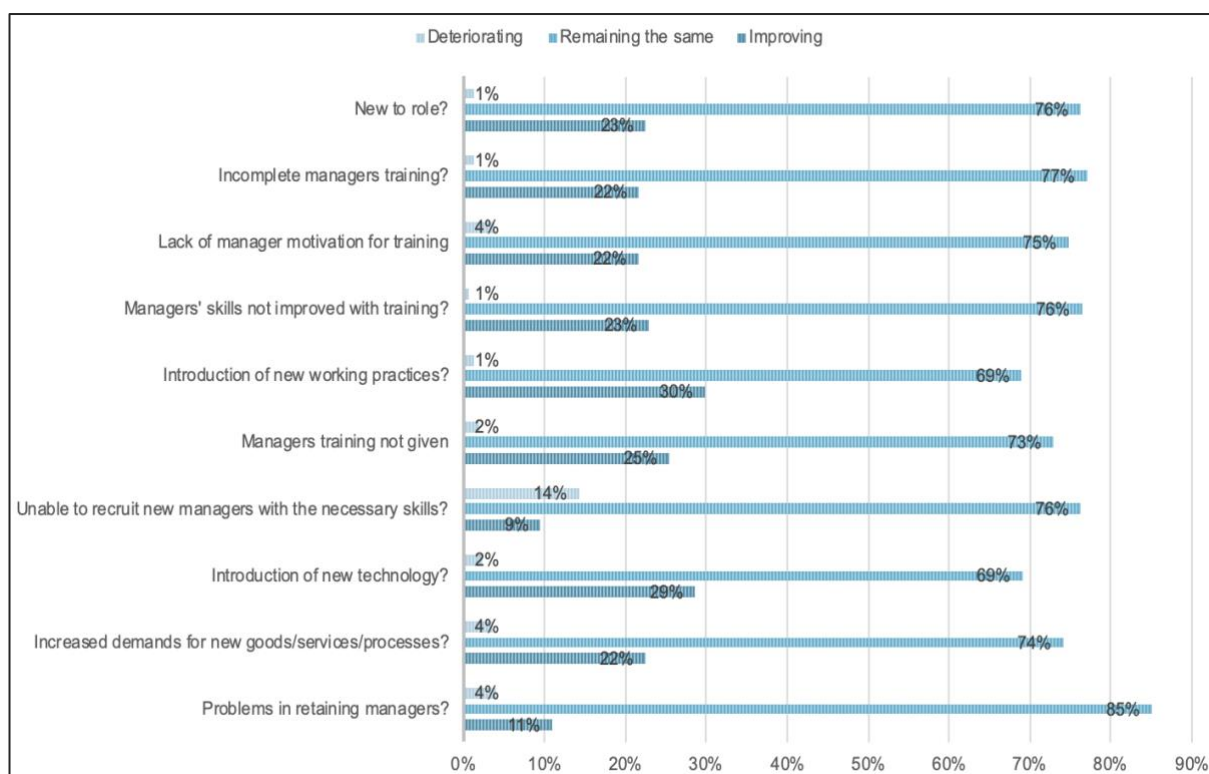
23. Hertfordshire micro-businesses noted improvements in manager's skills in introducing new working practices (17 per cent), increasing activities around the demand for new goods, services and processes (15 per cent), manager's being given training (15 per cent), and manager's skills improving after training (15 per cent).

Figure 4.7 Common reasons for micro business managers' skills gaps, and improvement or deterioration in last year



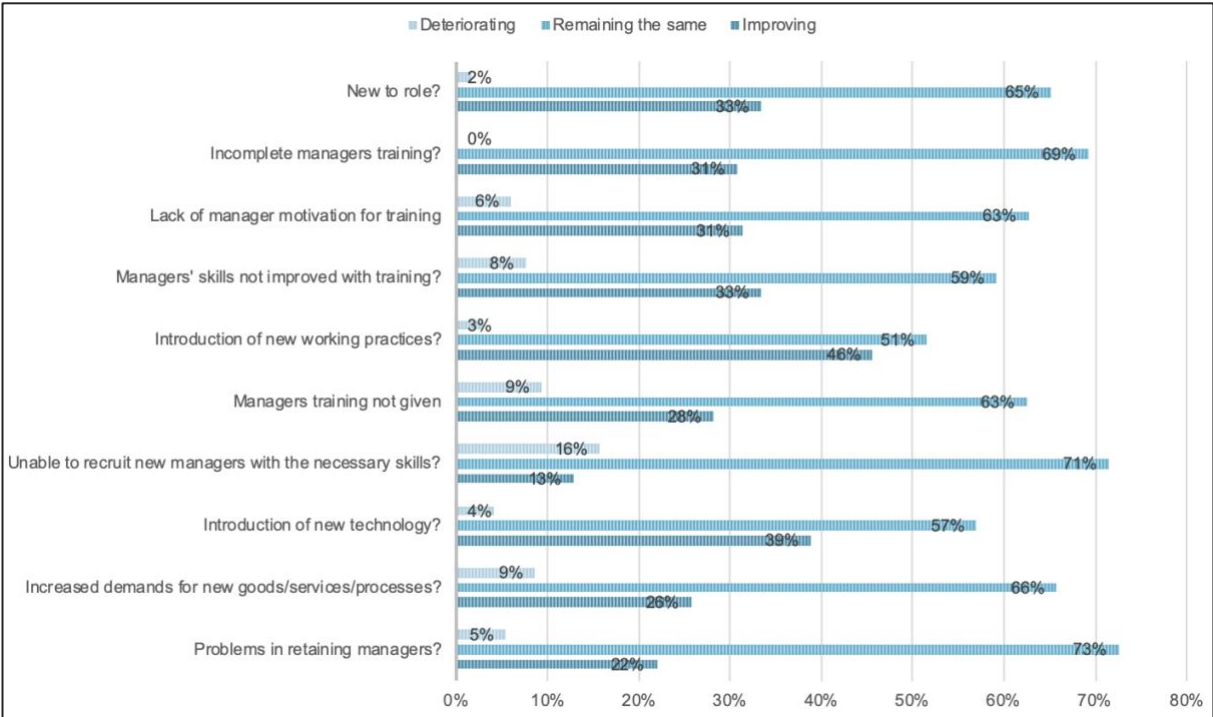
24. Hertfordshire small-businesses noted a steady improvement in manager's skills in introducing new working practices (30 per cent), introduction of new technology (29 per cent), manager's training being given (25 per cent), and manager's skills improving with training given (23 per cent).

Figure 4.8 Common reasons for small-sized business managers' skills gaps, and improvement or deterioration in last year



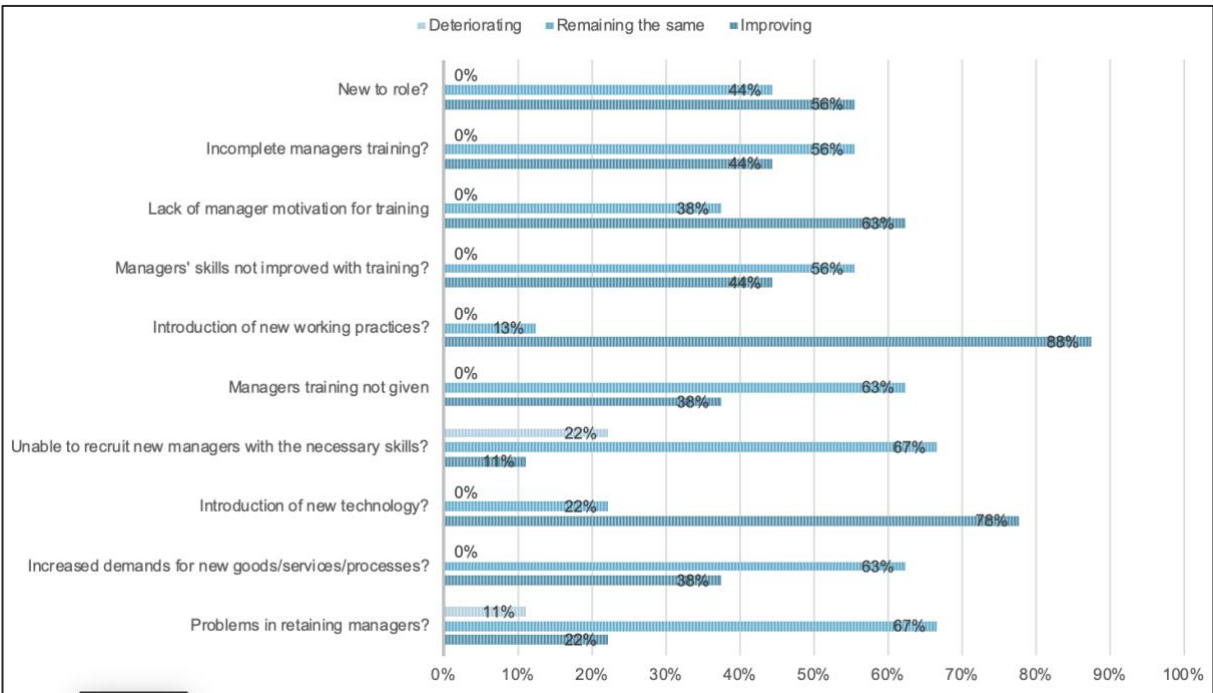
25. Hertfordshire medium-sized businesses expressed improvements in manager’s skills in introducing new working practices (46 per cent), introduction of new technology (36 per cent), newness to the role (33 per cent), and manager’s skills being improved with training (33 per cent).

Figure 4.9 Common reasons for medium-sized business managers’ skills gaps, and improvement or deterioration in last year



26. Hertfordshire large-sized businesses reported that improvements were noted against manager’s skills in handling the introduction of new working practices (88 per cent), the introduction of new technology (78 per cent), improvement in manager’s motivation to training (63 per cent), and newness to the role (53 per cent).

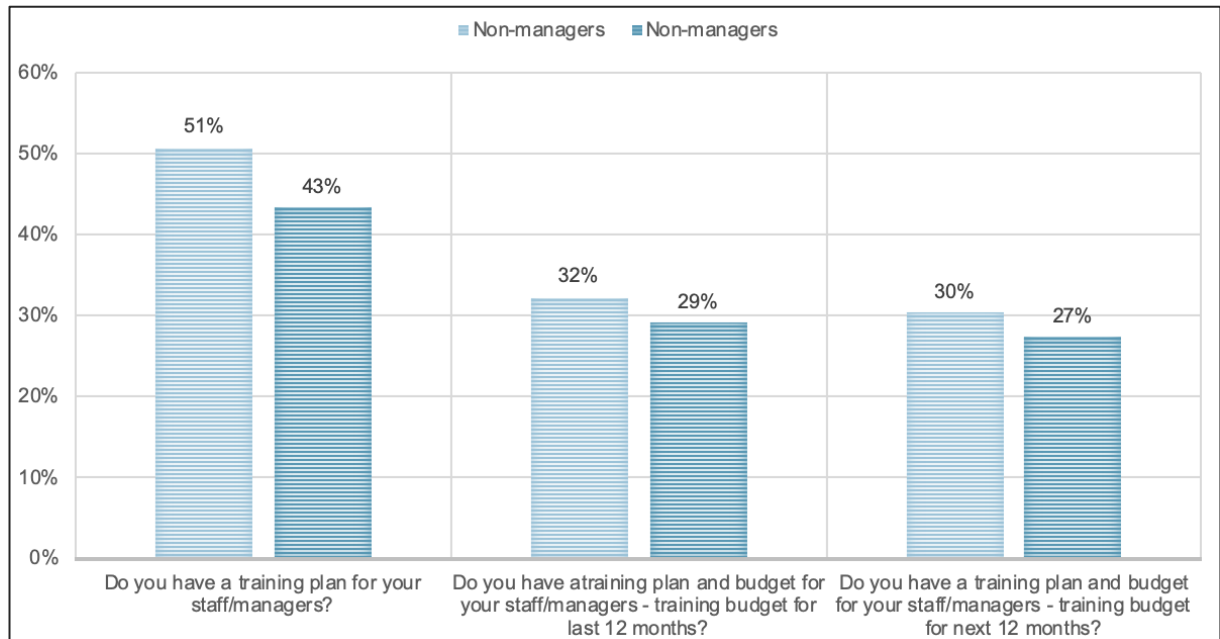
Figure 4.10 Common reasons for large-sized business managers’ skills gaps, and improvement or deterioration in last year



4.2 Hertfordshire businesses' Training plans

27. Fifty-one per cent of Hertfordshire businesses polled had training plans for their general staff, 43 per cent had training plans for their managers/leaders. In the last year thirty-two per cent of Hertfordshire businesses had a training budget for their general staff, and 29 per cent for managers/leaders. Thirty per cent expected to have a training budget for their general staff, and 27 per cent a training budget for their managers/leaders.

Figure 4.11 Hertfordshire businesses that have training plans and budgets, last and next year

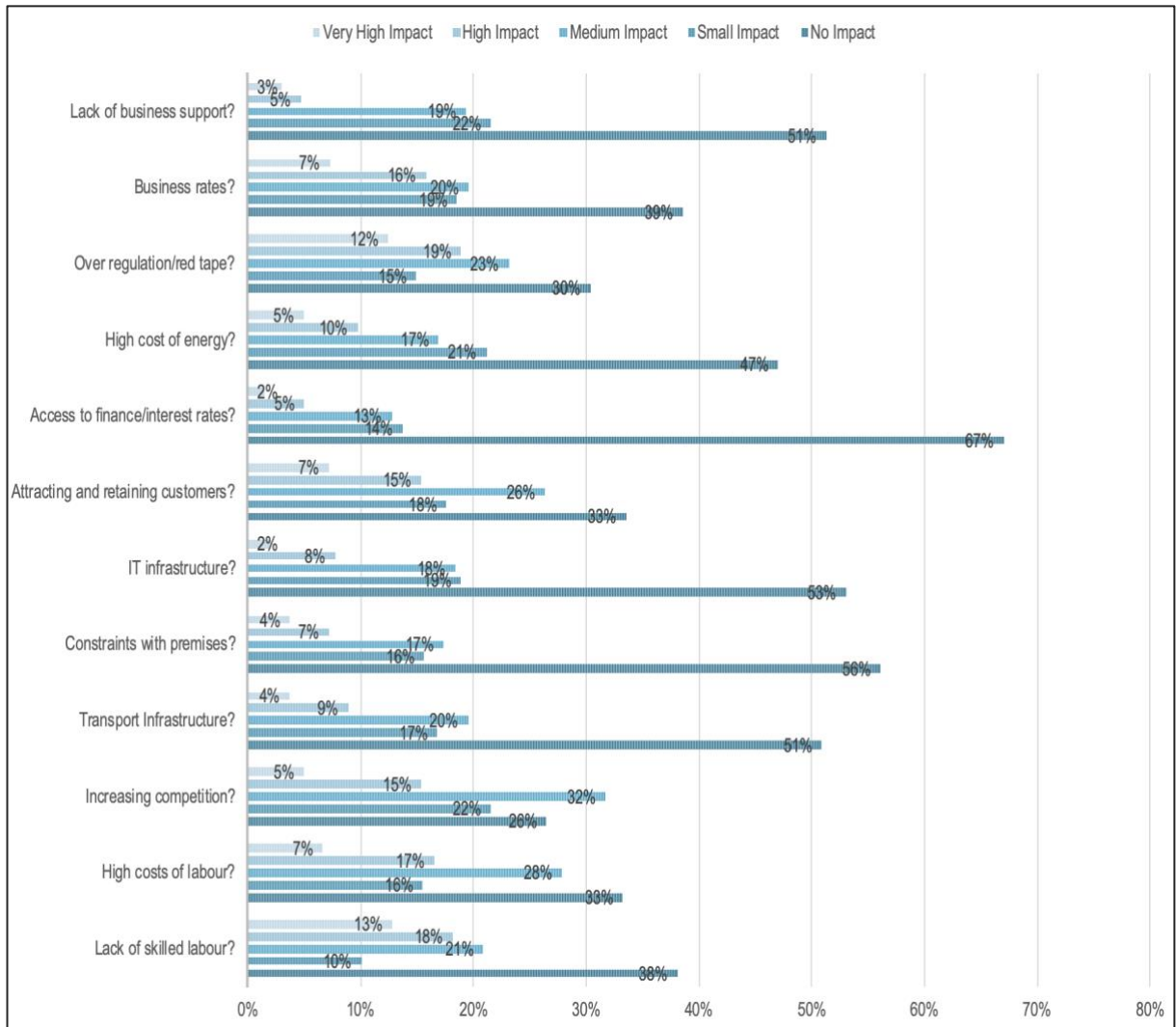


5 Main constraints on abilities to increase turnover, productivity and growth

5.1 Overview of main constraints for Hertfordshire businesses in achieving increased turnover and productivity, and growth

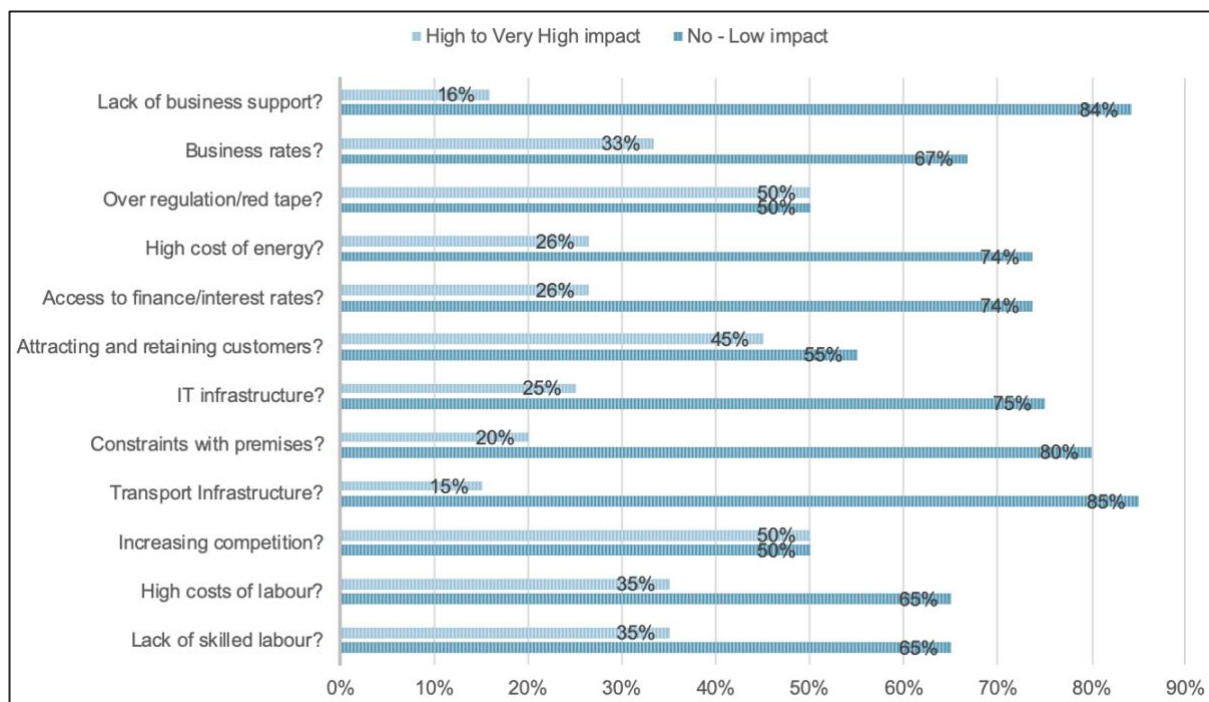
28. The top four obstacles cited by Hertfordshire businesses are lack of skilled labour (31 per cent), over regulation/red tape (31 per cent), high cost of labour (23 per cent) and business rates (23 per cent).

Figure 5.1 Proportion of Hertfordshire businesses citing each of the following main constraints



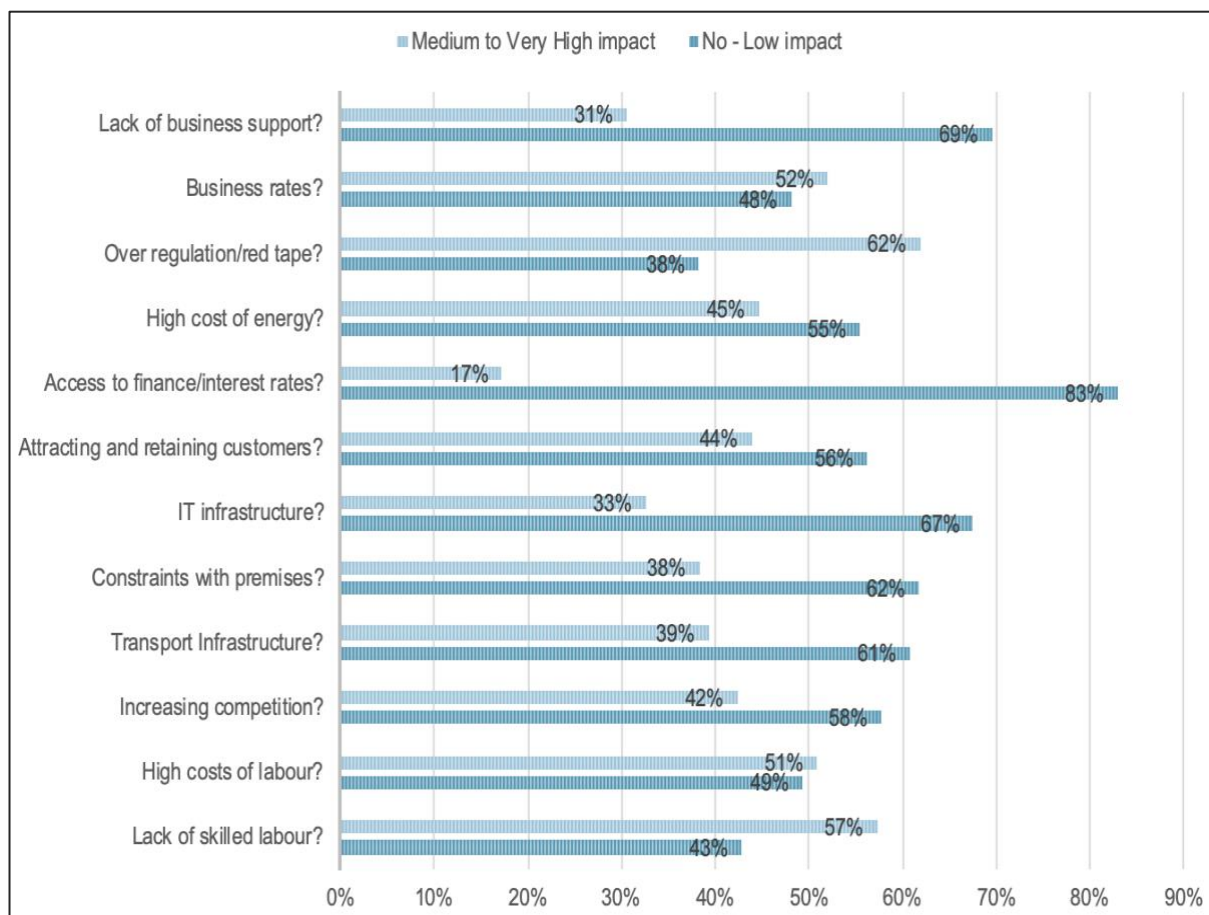
29. Hertfordshire micro-businesses were more likely to report on over-regulation/red tape (30 per cent), lack of skilled labour (28 per cent), attracting and retaining customers (22 per cent), business rates (18 per cent)) and increasing competition (19 per cent).

Figure 5.2 Life sciences and pharmaceutical sector main constraints



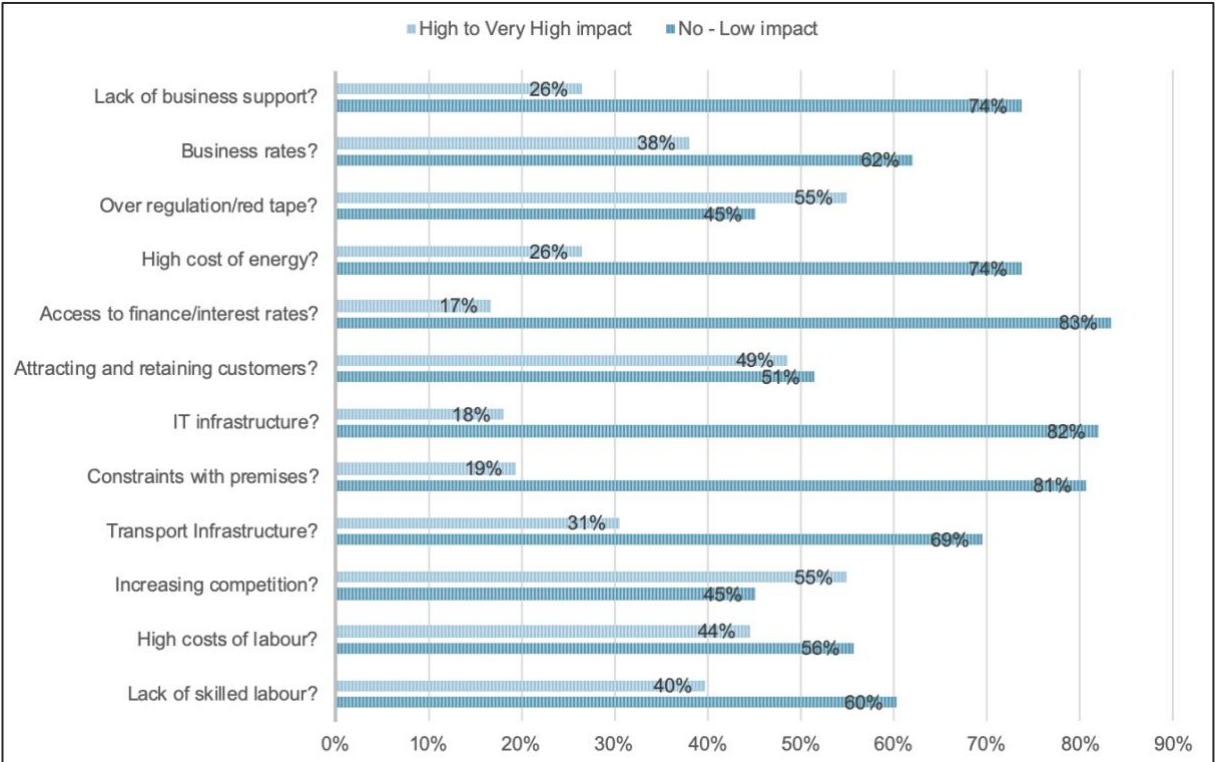
30. As one would expect there are some sectoral variations in the degree of impact Hertfordshire businesses perceive the impact of these different constraints on them and their sector. Life sciences and pharmaceuticals businesses rank the top four constraints on their sector as: increased competition (50 per cent), over regulation and red tape (50 per cent), attracting and retaining customers (45 per cent) and lack of skilled labour (35 per cent).

Figure 5.3 Manufacturing and advanced engineering sector main constraints



31. The manufacturing and advanced engineering sector’s top ranked constraints as: over-regulation and red tape (62 per cent), lack of skilled labour (57 per cent), business rates (52 per cent), and high costs of labour (51 per cent).

Figure 5.4 Professional, financial and technical services sector main constraints



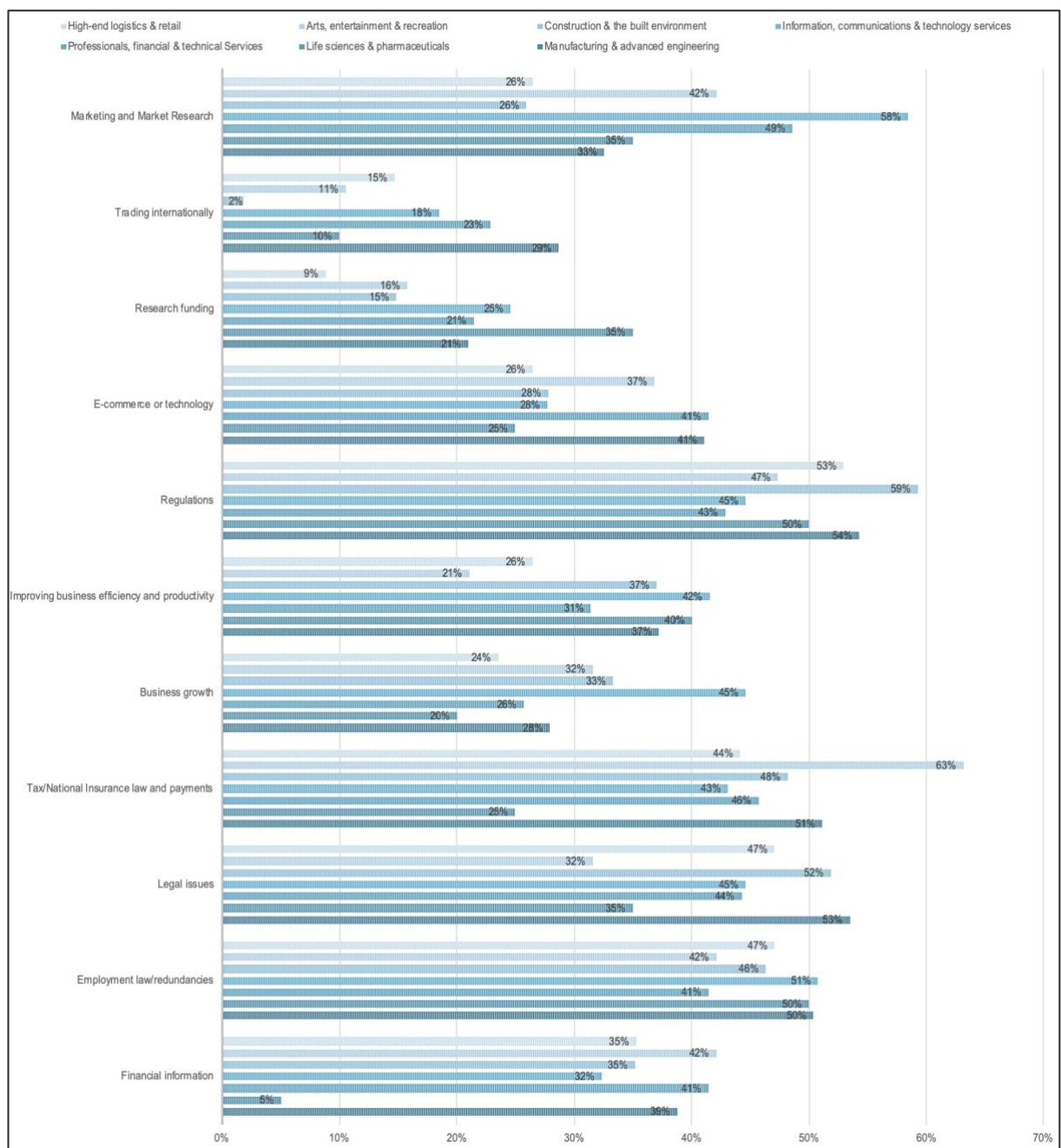
32. The professional, financial and technical services sector’s top ranked constraints as: high-costs of labour (56 per cent), over-regulation and red tape (55 per cent), increasing competition (55 per cent), and attracting and retaining customers (49 per cent).

6 Information sought and sources

6.1 Information sought in the last year

33. Businesses most likely to financial information are in the professional/financial/technical services (41 per cent), arts/entertainment/recreation (42 per cent), manufacturing/advanced engineering (39 per cent), and construction/built environment (35 per cent) sectors.
34. Businesses that sought marketing and market research information and advice were in the information/communications/technology service (58 per cent), professional/financial/technical services (49 per cent), arts/entertainment/recreation (42 per cent), and life sciences/pharmaceutical (35 per cent) sectors.
35. Businesses which sought information on how to improve business efficiency and productivity were in the information/communication/technology (42 per cent), life sciences/pharmaceutical (40 per cent), construction/built environment (37 per cent), and manufacturing/advanced engineering (37 per cent) sectors.

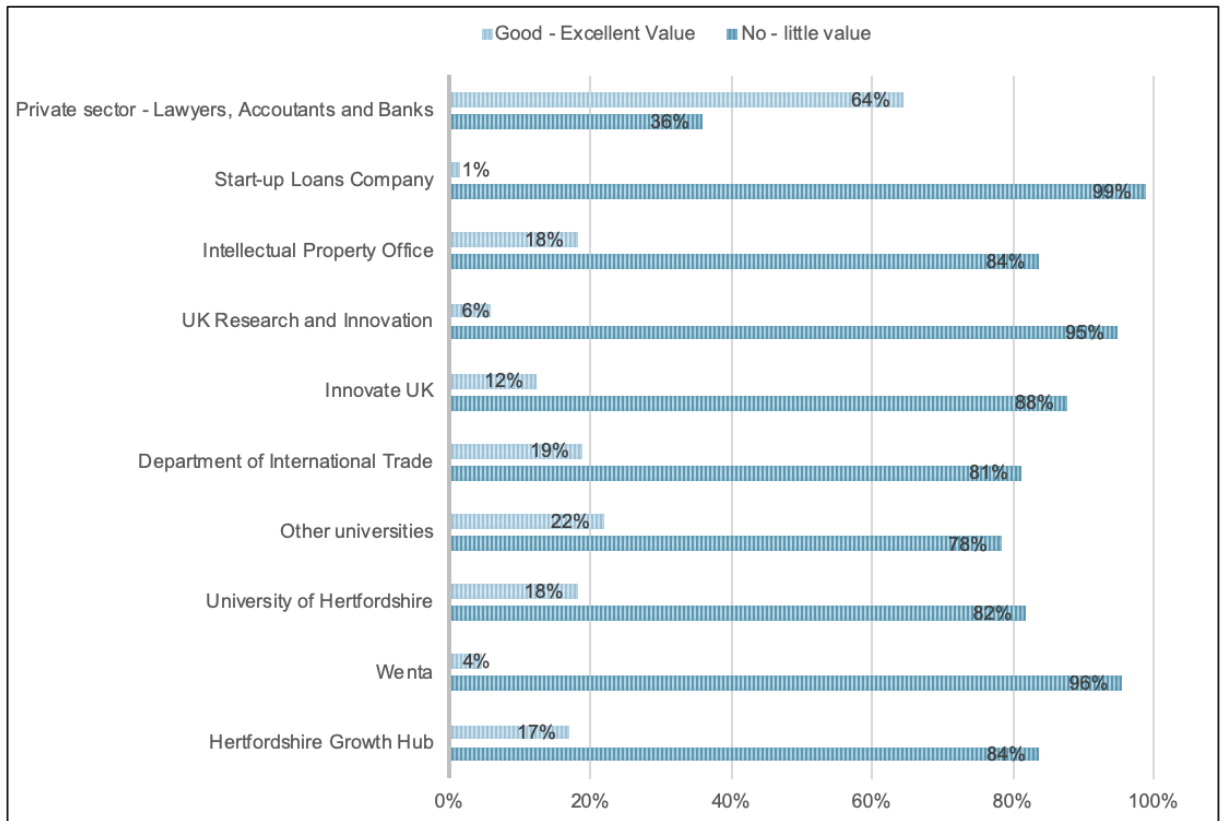
Figure 6.1 Information sought by Hertfordshire businesses, by sector



6.2 Sources of information and strategic advice

36. Sixty-four per cent of businesses seeking advice received good to excellent value from approaching their financial advisor, accountants or solicitor. Twenty-two per cent of businesses had good-excellent value information and advice from universities, department of international trade (19 per cent), intellectual property office (18 per cent) and Hertfordshire Growth Hub (17 per cent).

Figure 6.1 Information sources, and perceived value of advice given

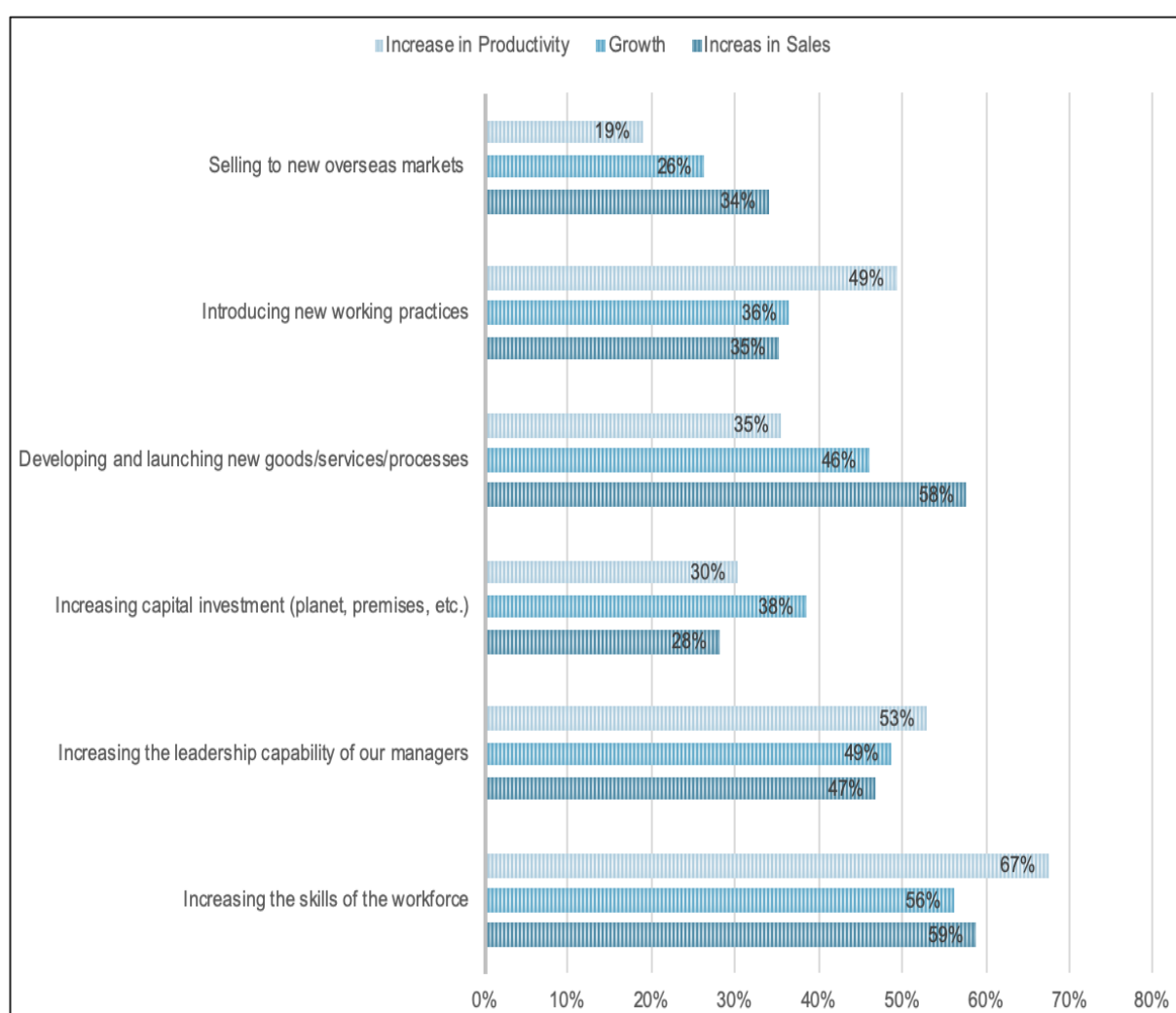


7 Future plans

7.1 Business plans for the next three years

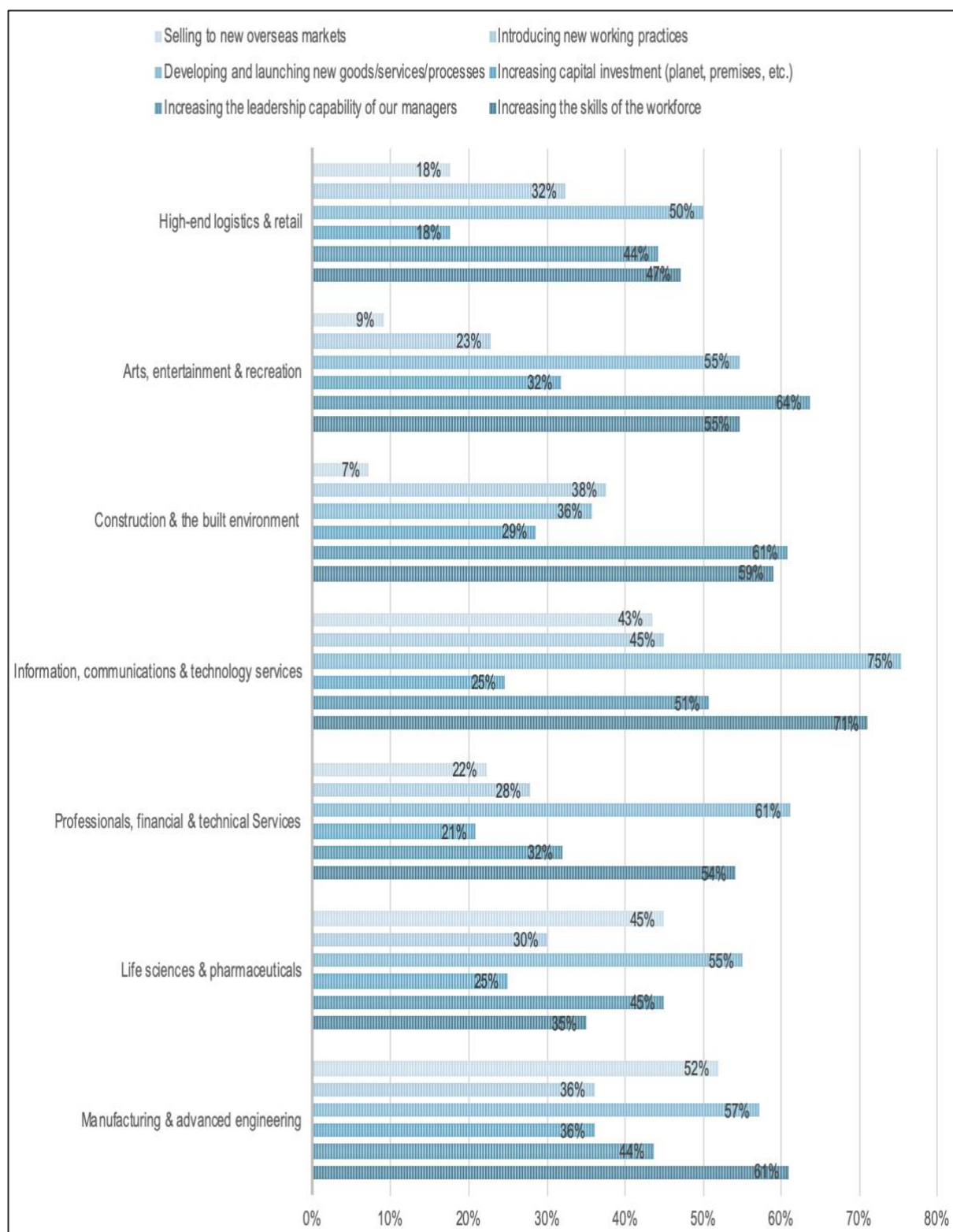
37. Hertfordshire businesses understand the importance of increasing the skills of the workforce and its potential impact on increasing turnover (59 per cent), contributing towards business growth (56 per cent), and increasing overall productivity (67 per cent).
38. Investing in new goods, services and processes development is recognized, by the businesses, to increase turnover (58 per cent), contribute towards growth (46 per cent), and increase overall productivity (35 per cent).
39. Most significant after investing in the skills of their staff is the investment in increasing leadership capability of their managers/leaders, with over fifty-three per cent suggesting it would improve productivity, 49 per cent linking it to improved growth, and 47 per cent in increasing overall business turnover.

Figure 7.1 Hertfordshire businesses business plans for the next three years



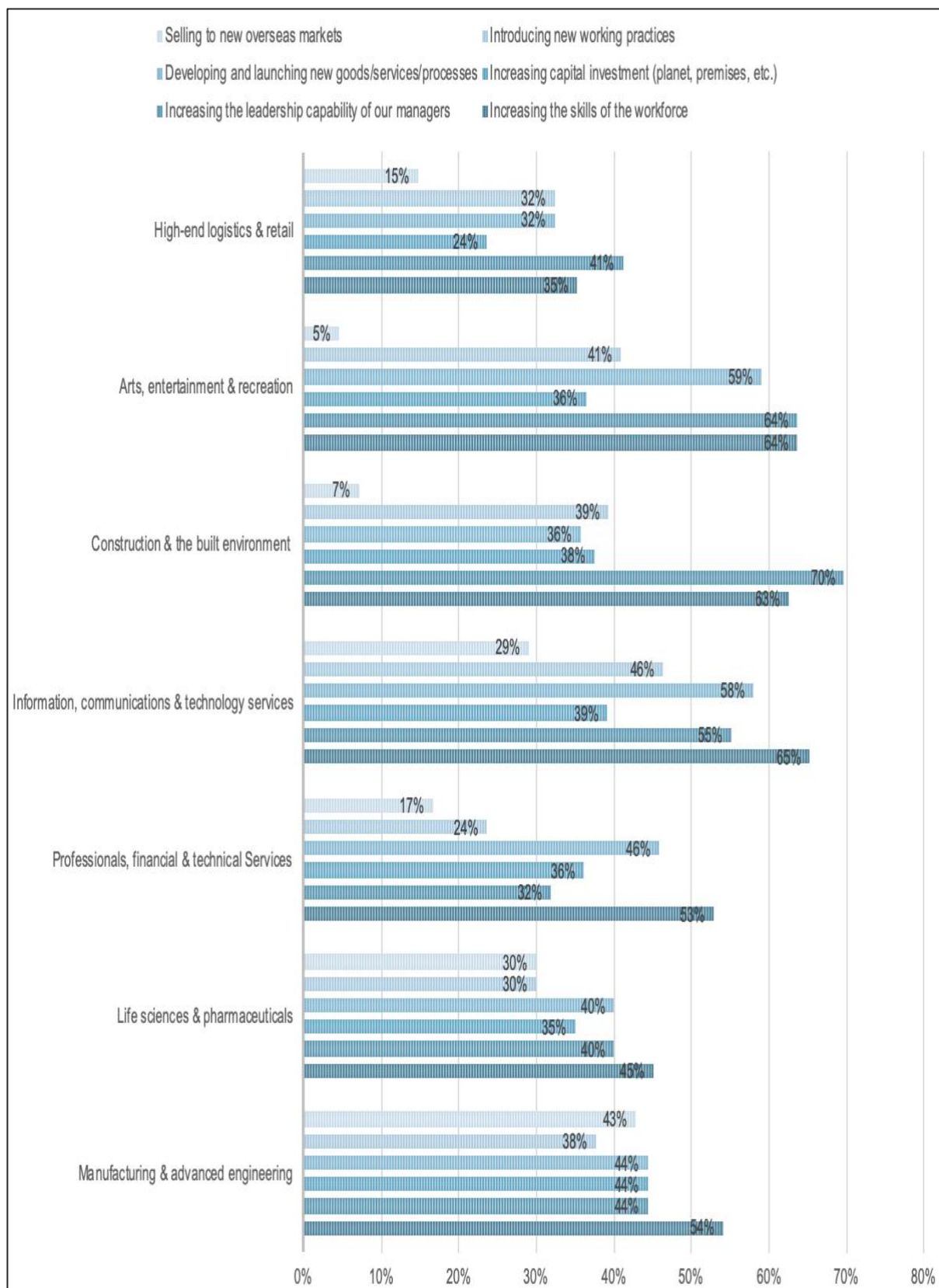
40. Hertfordshire business sectors: information/communication/technology (45 percent), construction/built environment (38 per cent), and manufacturing/advanced engineering (36 per cent) saw introducing new working practices as being 3rd most influential in increasing sales.

Figure 7.2 Hertfordshire businesses business plans to increase sales over the next three years, by sector.



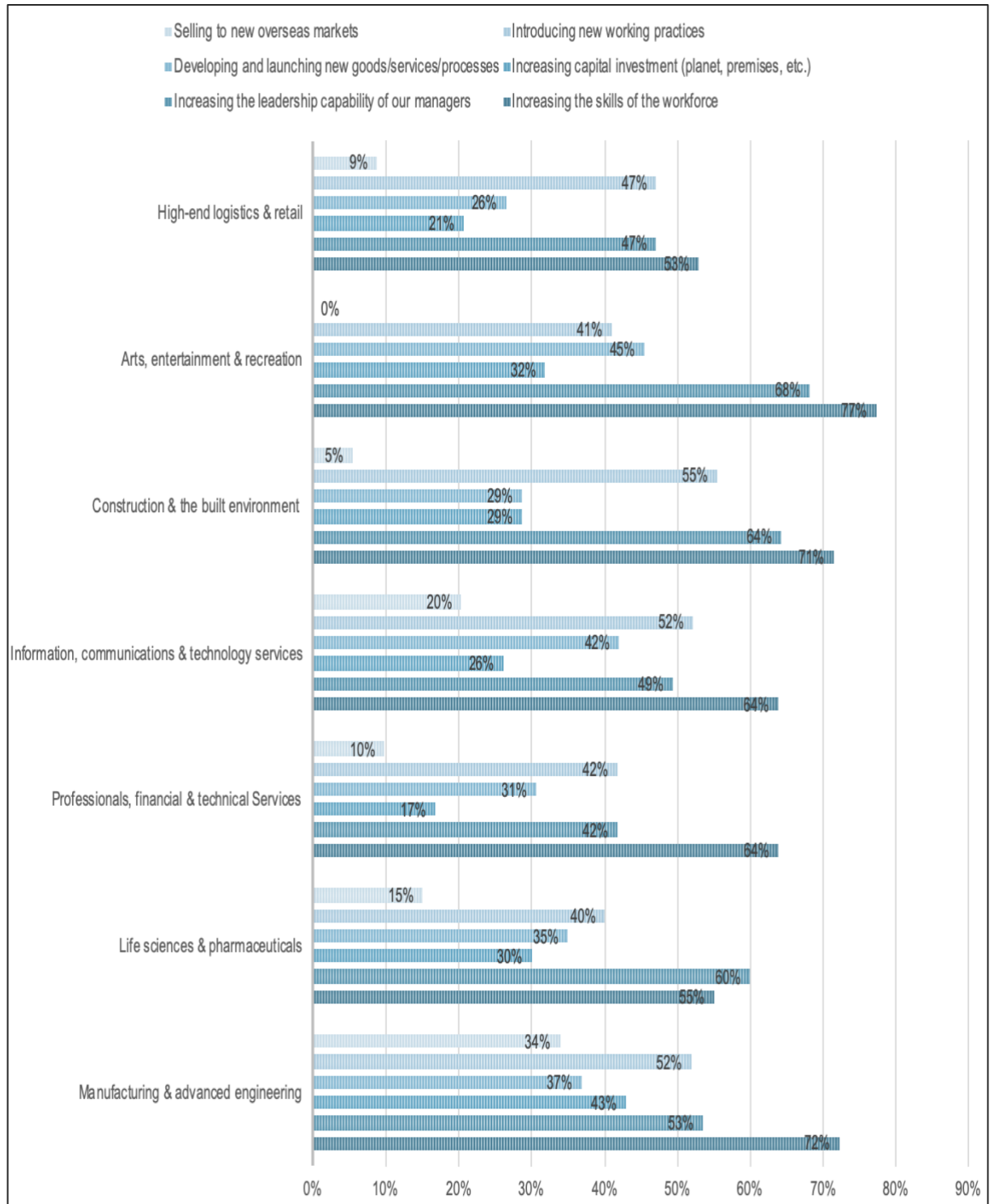
41. Information/communications/technology business sector ranked increasing the skills of the workforce (71 per cent) and developing new goods/services/processes (75 per cent) as most influential on increasing sales.
42. Developing new goods, services and processes was the 2nd most likely business plan activity, in the next three years, to increase sales for information/communications/technology service (65 per cent), professional/financial/technical service (55 per cent), arts/entertainment/recreation service (55 per cent) and manufacturing/advanced engineering (57 per cent) sector businesses.

Figure 7.3 Hertfordshire businesses' business plans to grow over the next three years, by sector.



43. Manufacturing/advanced engineering, professional/financial/technical, information/communications/technology, construction/built environment and arts/entertainment/recreation business sectors ranked increasing the skills of the workforce (72 per cent, 64 per cent, 64 per cent, 71 per cent and 77 per cent respectively).

Figure 7.4 Hertfordshire businesses business plans to increase productivity over the next three years, by sector.

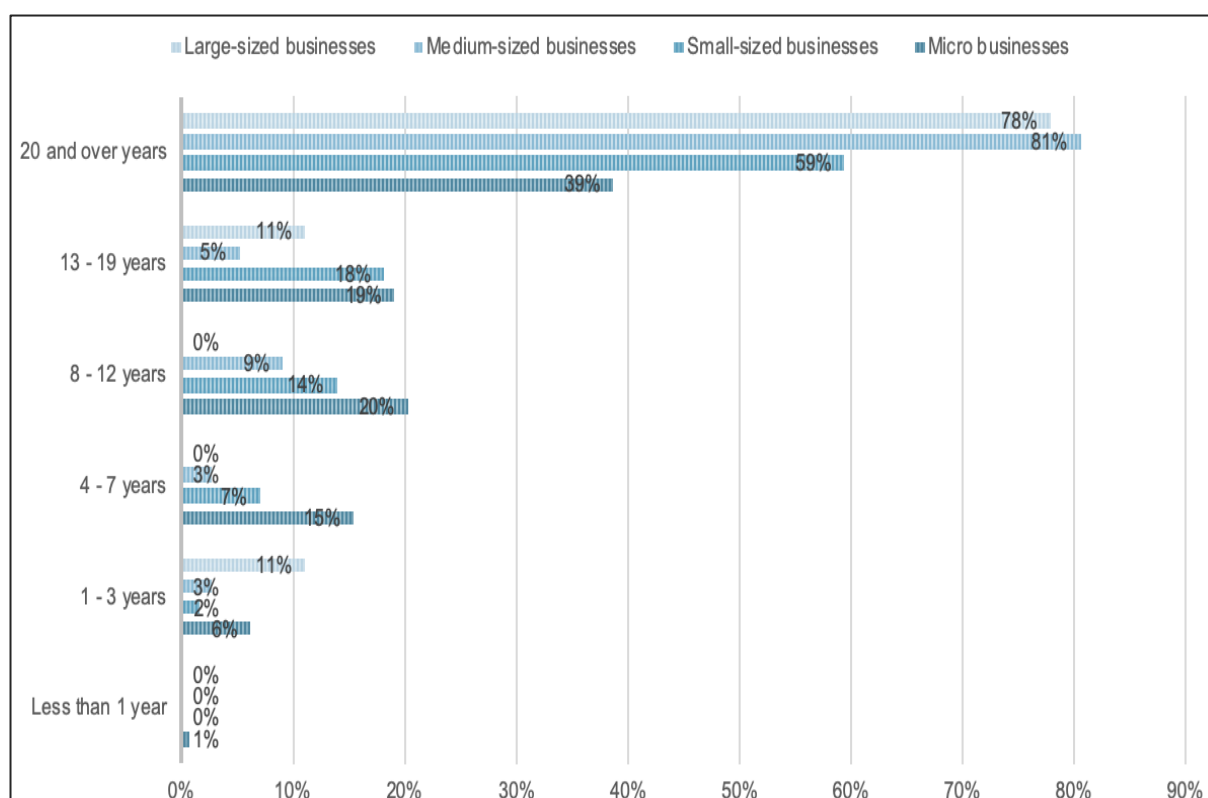


8 Profiles of Hertfordshire Businesses

8.1 Age of businesses

44. Thirteen per cent of SME employers in 2018 first started trading 0 – 7 years previous. Fifteen per cent 8 – 13 years previously, 16 per cent 13 – 19 years previously, and 55% 20 years or more previously.
45. Small to medium-sized businesses tended to be older than micro-businesses. Eighty-one per cent of medium-sized businesses were 20 years or more, compared to 59 per cent of small-sized businesses, and 39 per cent of micro-businesses.
46. By sector, those most likely to be aged 0 – 7 years were in life sciences/pharmaceuticals (26 per cent), arts/entertainment/recreation (20 per cent), and information/communication/technology (14 per cent). Those most likely to be aged 20 years or more were in manufacturing/advanced engineering (76 per cent), construction/built environment (65 per cent), and life sciences/pharmaceuticals (52 per cent).

Figure 8.1 Age of business, by size



8.2 Size and sector definitions

47. Throughout this interim report, the data tables and charts show business size and sectoral analysis. For the purposes of the Hertfordshire Local Enterprise Partnership focus on seven key sectors, we have encompassed them into the following:
 - 47.1. Manufacturing & advanced engineering – includes 95 of the three-digit SIC codes;
 - 47.2. Construction & the built environment – including electrical & plumbing (30%), building completion (25%) and building construction (18%);
 - 47.3. High-end logistics & retail – specialized stores (17%), maintenance and repair of motor vehicles (13%), non-specialised stores (12 %);

- 47.4. Information, communications and technology services – computer programming and consultancy (74%);
- 47.5. Professional, financial and technical services – management consultancy, architecture and engineering, accountancy, financial services and estate agencies;
- 47.6. Life sciences & pharmaceuticals – general practitioners (42%), residential care, pharmaceuticals and social care;
- 47.7. Arts, entertainment and recreation – sports activities (45%), creative and arts (34%), amusement/recreation (15%).

9 Notes on this interim report

48. This report sets out the initial descriptive statistical findings of the 2019 Hertfordshire Business Productivity Survey (HBPS), a county/LEP-wide telephone survey of 436 owners and managers of Hertfordshire businesses, commissioned jointly by Hertfordshire Local Enterprise partnership and Hertfordshire Growth Hub. The survey was conducted between January 2019 and May 2019 by Market Research Service, University of Hertfordshire.
49. The main aim of the cross-sectional survey was to collect a range of business information on micro businesses, small-sized businesses, medium-sized businesses and large businesses within Hertfordshire.
- 49.1. The characteristics of Hertfordshire businesses, there size, sector, age of business, main business activity, etc.
 - 49.2. Turnover activity for the last year, and prediction for the current year, and related employment activity
 - 49.3. Business constraints
 - 49.4. Innovation activity
 - 49.5. Staff and manager skills gaps, and training plans
 - 49.6. Use of business support, and their sources
 - 49.7. Next three years business plan activities
50. The table 9.1 shows the sample size for the Hertfordshire businesses surveyed:

Sample Size		
Total Business Sample	436	
Micro businesses (1 – 9 employees)	163	
Small-sized businesses (10 – 49 employees)	187	
Medium-sized businesses (50 – 249 employees)	77	
Large businesses	9	
Manufacturing & advanced engineering	135	
Life sciences & pharmaceutical	23	
Professional, financial and technical services	84	
Information, communications and technology services	69	
Construction and the built environment	60	
Arts, entertainment and recreation	25	
High-end logistics and retail	36	

Table 9.1 Sample Size

