

Productive Business Index

Edition Four

Q1 2022



1. Foreword

by Anthony Impey MBE, CEO, Be the Business



This fourth edition of the Be the Business Productive Business Index (PBI) provides a fascinating insight into what leaders of small businesses have been through over the past 12 months. Throughout the four editions of the PBI, we have seen the ebb and flow of business performance and the changing priorities of business leaders as they adapted to cope with a rapidly shifting business environment. I believe that this edition of the Index is the most revealing and the most positive to date.

We can see from the data that businesses are still optimistic for the future. However, this optimism is tempered by signs that increasing costs are set to impact growth and financial performance. It is also apparent that businesses are facing a diverse range of challenges, from competition for skills, to supply chain disruption, to increasing energy prices. Despite this, within the data there is cause for optimism.

A core purpose of this Index is to measure what steps UK businesses are taking to improve their capabilities and productivity. In the four editions since January 2021, we can see a clear trend of UK businesses increasingly focusing on building their capabilities. We can observe increased activity and investment across a whole range of categories of business operations that we know drive productivity improvements. This is most evident in the technology category, with clear and consistent increases in investment in e-Commerce and operational software. We also see steady increases in businesses investing in their management and leadership capabilities. Crucially, we note businesses increasing their operational efficiency. This includes measuring their performance and productivity, long-term planning, using data in decision making, and managing risk.

There is a strong case to be made that the difficult experiences of the past two years have shifted mindsets amongst leaders of small businesses. Their focus is increasingly on efficiency and performance management. If this trend continues over the coming year, we can expect to see a growing cohort of businesses for whom productivity has become a core business objective. As their efforts bear fruit, we hope to see this materialise as the broad-based productivity increases which are so important to increase competitiveness and improve standards of living.

UK businesses – a new focus on productivity and performance management?

This edition of the Index reveals a number of encouraging trends. Businesses indicate they are continuing to invest in building their capabilities in several areas critical for productivity improvement.

Investment in the adoption of technology also remains a priority. Could this indicate a longer-term trend toward increasing productivity amongst UK micro, small and medium enterprises?

The effects of poor productivity are numerous for British businesses and the people they employ, reducing the ability of business leaders to grow profits and put themselves in a position to increase wages or hire new employees.

The first step to addressing any problem is understanding its root cause and the changes that can fix it. Since 2017, Be the Business has studied the productivity puzzle. Today, we can say with a high degree of confidence that we understand the key drivers of productivity. In particular, we know that there are five key areas that drive a productive, high performing business:

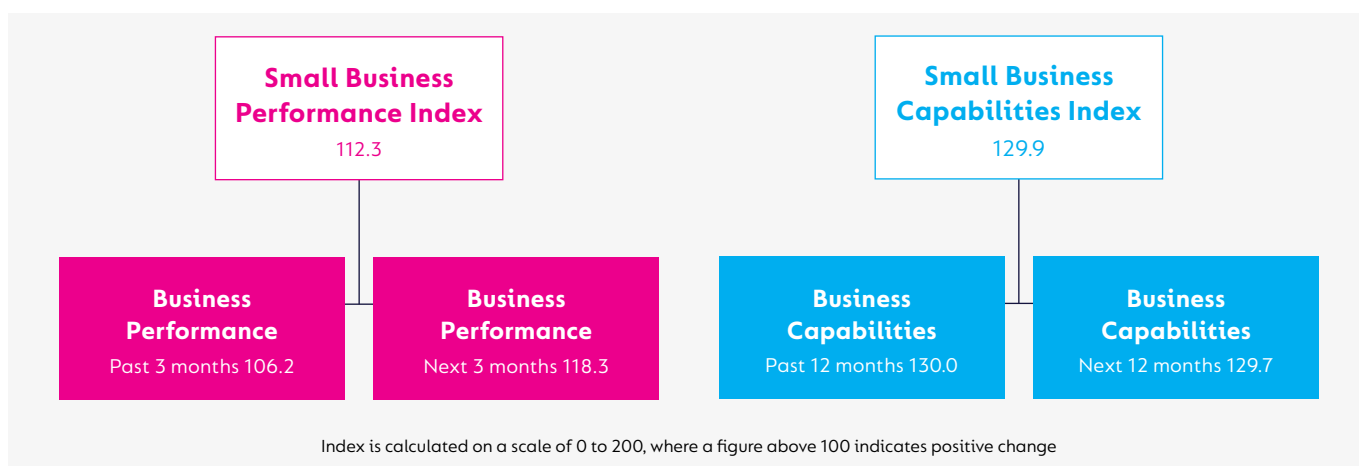
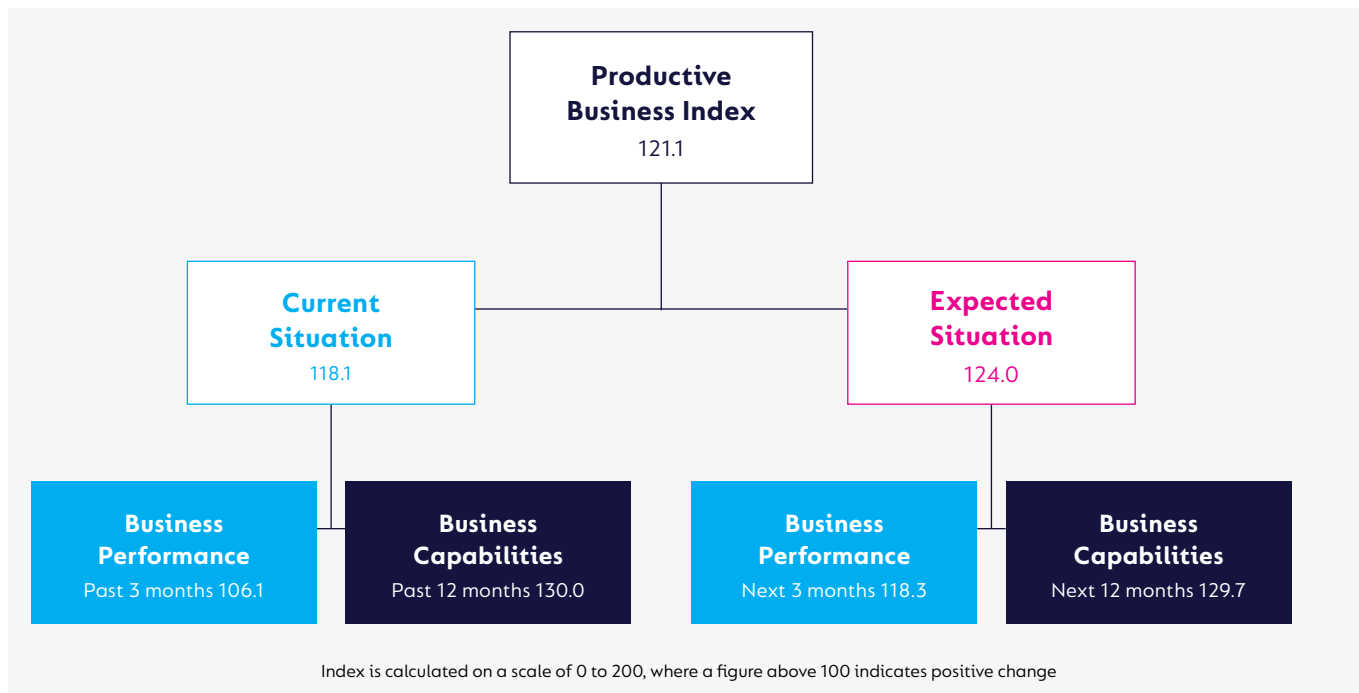
- **Management and Leadership:** does the business have a plan for its future and a strategy to get there?
- **Technology Adoption:** is technology, in various guises and even at the simplest levels, embraced?
- **Training, Development and HR:** is the environment to learn and improve built into company systems and structures?
- **Operational Efficiency:** is there a constant focus on improving elements of everyday performance?
- **Innovation and Ideas:** are the conditions fostered to create and test new ideas that will enhance the business?

Movement in any one of these critical factors influences the productivity of a firm. This is why we created the Productive Business Index. It is designed to track not just firm performance, but also recent investments and focus, as well as plans for investment in these key areas.

The Index focuses on micro, small and medium sized businesses in the UK, which we define as employing between 2 and 250 employees. We track changes in the five key areas noted above, as well as general operating conditions, barriers to growth and expectations for the future. This is our fourth Index report following an initial publication in January 2021.

The data we collect is analysed and combined to produce our Index:

- **Business Performance** measures trading conditions and company sentiment.
- **Business Capabilities** assesses activity in the five areas that drive productivity improvements.
- In both **Performance** and **Capabilities**, we assess the current situation, as well as asking about future expectations and plans for improvements.
- We then produce a business **Performance Index** and a business **Capabilities Index**.
- These are combined to produce assessments of the overall Current and Expected situation.
- And finally, these combine to form our overall **Productive Business Index** figure.



2. Headline findings from the Productive Business Index Q1 2022

The headline Productive Business Index has increased two points from 119.0 in Q3 2021 to 121.1 in Q1 2022

- This increase in the PBI is the smallest level of growth recorded between editions of the Index. The previously recorded increase between Index 1 and Index 2 being 6.1 points, and between Index 2 and Index 3 being 10.2 points
- This small increase visible in the current edition was driven less by business performance and more by businesses investing and planning to invest in their capabilities. This is the first Index where the growth level visible in business performance was less than the level of growth in business capabilities
- The Business Performance Index has moved from 111.3 to 112.3
- The Business Capabilities Index has increased 3.1 points from 126.8 to 129.9

A clear, rising trend in businesses taking action to improve productivity

- The number of businesses intending to spend management time on strategic planning has increased by 10 points, from 43% to 53%, since Edition 1 of the PBI
- For the first time, more than half (53%) of businesses believe they can accurately measure their productivity and identify efficiencies, up from 46% in Edition 1

The acceleration of technology adoption forced by COVID continues

- Technology adoption has increased throughout the pandemic, with a 10-point rise in the number of businesses confident in their use of e-Commerce, from 38% to 48%
- Nearly half (48%) have increased their use of virtual meeting tools like Zoom and over a third have improved back-office services, operational software and e-Commerce. Only in more specific areas, such as data mining, is the proportion lower at just over a quarter

Future plans for technology are focused on e-Commerce, operational software and investment in digital skills training

- The number of businesses with plans to increase investment in technology is also increasing in areas such as e-Commerce (from 33% in Edition 2 to 39% in Edition 4) and operational software (27% in Edition 2 to 30% in Edition 4)
- Skills and training to deploy the technology are also an increasing focus, with both training for both management (26% in Edition 3 to 31% in Edition 4) and employees (35% in Edition 3 to 40% in Edition 4) rising

Businesses are moving out of crisis mode and focusing on operational efficiency and the future

- A growing proportion of businesses are intending to take action to improve efficiency and productivity, with an increase of 22% to 28% from the previous edition
- There is a similarly significant rise in businesses intending to use data to improve their operations (from 28% to 35%) and measure both staff and business performance (29% to 33%)

And over the next 12 months, businesses expect to focus less on responding to, and coping with, COVID

- There has been a slight but consistent fall in the proportion of businesses intending to focus on health, safety and risk management from 38% in Edition 2, down to 35% in Edition 4
- In combination with the increase in forward planning, there are signs that businesses have more scope to look to the future rather than just responding to huge daily challenges of COVID

However, the overall business situation remains very difficult, with little change in the numbers seeing improved revenues

- Fewer businesses (28% - down from 31%) are reporting growing revenues over the last three months, although the number reporting falling revenues also fell slightly from 24% to 22%
- The general business situation shows a similar picture, with the number of businesses seeing improved general business conditions over the past three months falling from 27% to 24%
- The proportion expecting to see revenues increase in the next three months has fallen from 36% to 33%, highlighting a lack of confidence in strong growth

There are different pressures on business across geography and sector

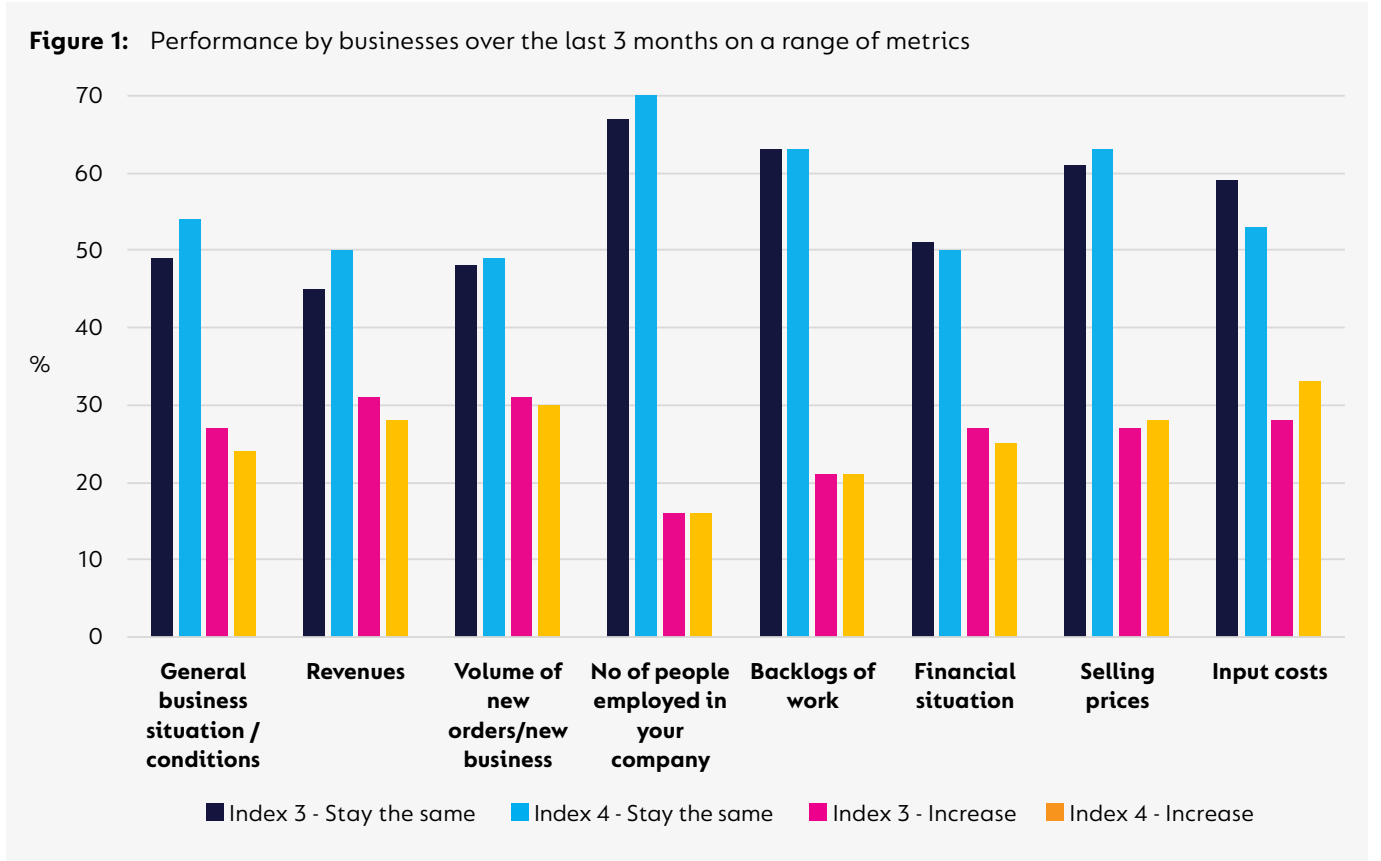
- The outlook for businesses varies by geography, with 31% of businesses expecting to be either down a little or really struggling in 6 months' time, compared to only 19% in both the North East and West
- Rising energy prices hit some sectors much harder than others, with accommodation and food service (48%) citing it as a major pressure. Only 18% of finance and insurance businesses cited it as a major concern
- Supply chain disruption is causing pressure on 63% of wholesale businesses and nearly half of manufacturers, but only 11% of accommodation and food businesses

Concerns over costs and availability of skilled workers are increasing

- Increasing labour costs have become a much bigger issue for businesses in the last three months, increasing from 16% to 22%
- Alongside these wage pressures, there is an growing shortage of skills, with an increase in businesses citing it as a business constraint from 13% to 18%

3. Business performance and sentiment

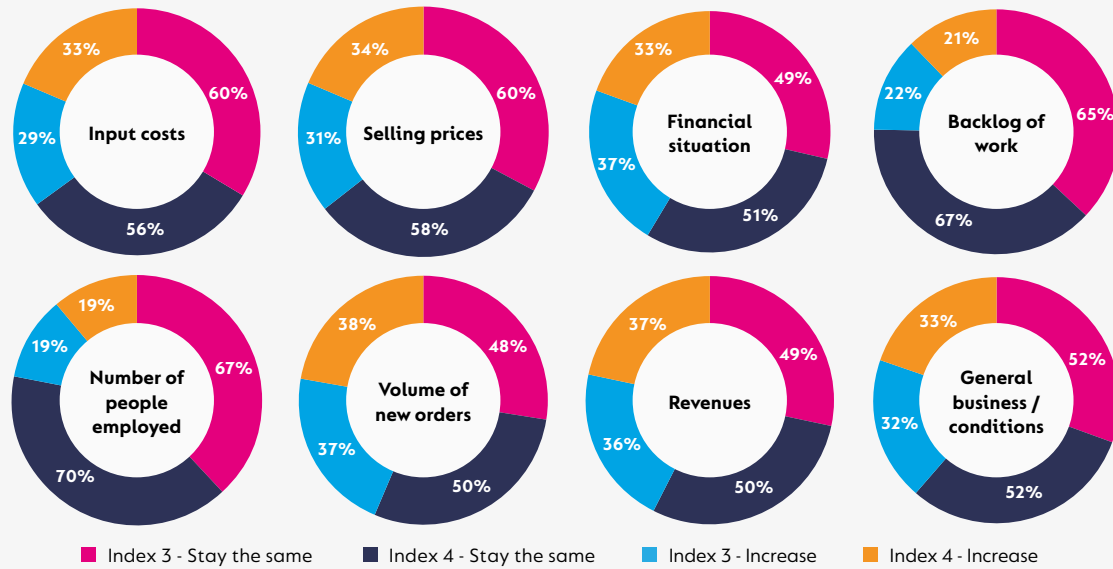
Looking back over the past 3 months, the data indicates a slowing of growth momentum and a stabilisation of sentiment. 24% of respondents report an improvement in their situation, down 27% in the previous edition. 28% report an increase in revenues over the past 3 months, down 3% from the previous edition. The only category with a clear increase reported over the past 3 months is input costs, with a 5% increase to 33% in the number of businesses reporting increased costs. This continues a trend which has emerged over the past four editions of the Index and which we address in more detail later in the report.



In terms of the future, the data indicates that businesses expect their performance to remain broadly stable over the next 3 months. Those predicting an increase in revenues and volumes of new orders remain broadly the same as the last edition, at 37% and 38% respectively. In terms of employment, businesses predicting that they will maintain the same level of employment (no increase or decrease) moves from 67% to 70%. There is a decrease in the percentage of businesses predicting an improvement in their financial situation over the next 3 months, with the figure dropping 4% from 37% to 33%.

Two categories where businesses do clearly predict increases over the next 3 months are selling prices and input costs. We see selling prices predicted to increase 3% to 34%, and input costs are predicted to rise 4% to 33%.

Figure 2: Expectations for performance over the next 3 months








4. The five areas businesses are focusing on to improve productivity

We ask small business leaders to rank what they believe are the priority areas to focus on in order to increase productivity. For the fourth Index in a row, Management and Leadership is again the clear leader.

The rankings of the other capabilities have also remained consistent across the four editions, with Operating Efficiency and Technology again occupying the second and third positions, followed by Innovation and finally Human Resources.

Figure 3: Capabilities Ranked

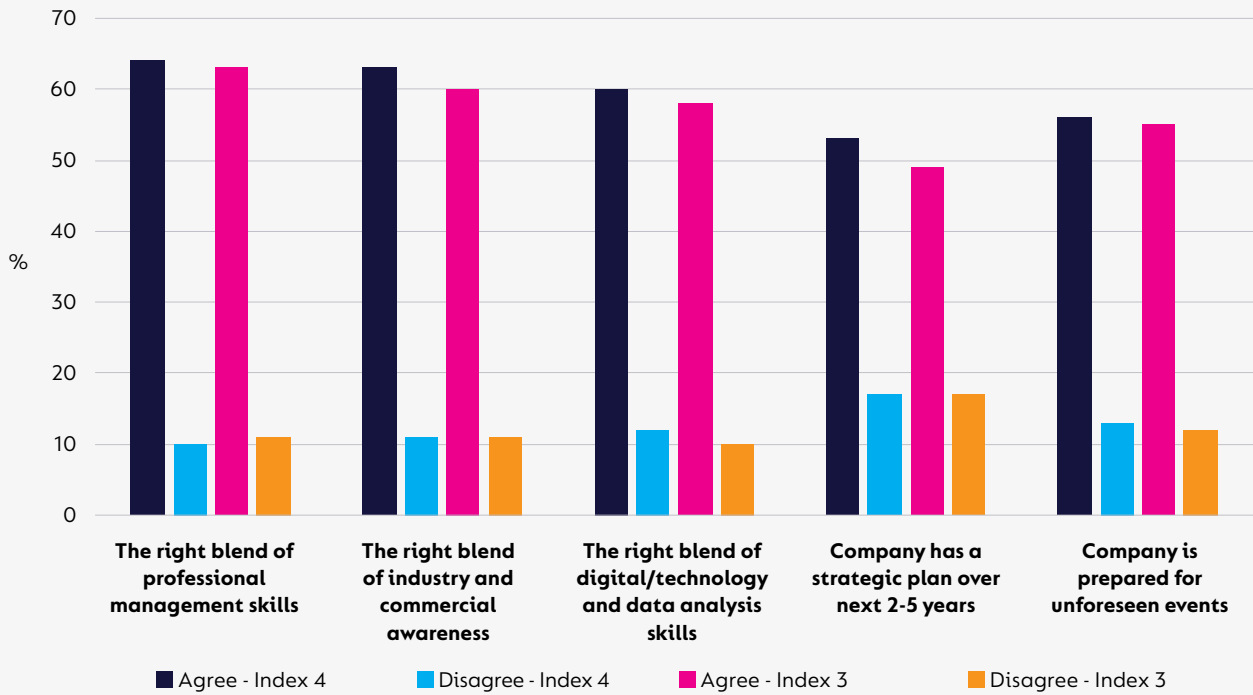
	Index 4	Index 3	Index 2	Index 1
 Management and leadership	2.3	2.3	2.3	2.2
 Operating efficiency	2.6	2.6	2.5	2.5
 Technology	3	3	3.1	3.1
 Innovation	3.3	3.3	3.3	3.3
 Human Resources	3.5	3.4	3.5	3.5

Management and Leadership

There have been improvements across the board in businesses assessment of their management and leadership skills. The percentage of business decision makers who believe their business has the right blend of professional management skills shows a small increase to 64%, while respondents that believe that their company is prepared for unforeseen events remains broadly the same at 56%. Those that feel they have the right blend of digital/technology and data analysis skills rises from 58% to 60%, and those that feel they have the right blend of industry and commercial awareness rises 3% to 63%.

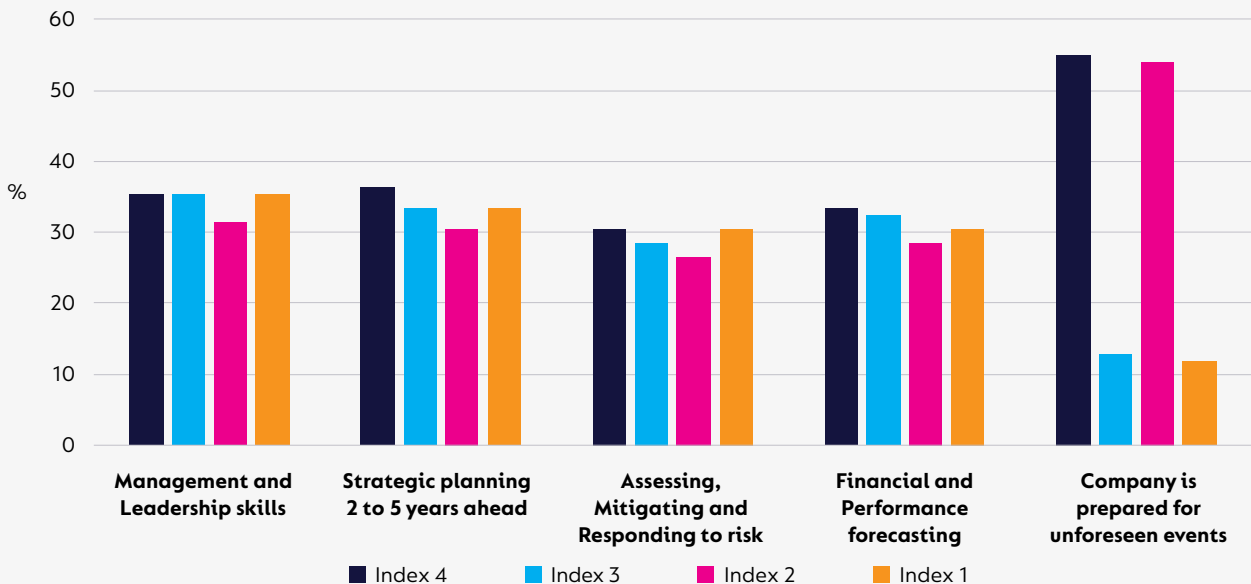
There is a strong increase of 4% in businesses that have a strategic plan for the next 2 – 5 years. This category has increased steadily over the past four editions, rising a total of 10 percentage points since the first edition of the Index.

Figure 4: Views on strength of company leadership and management skillset



Looking ahead, the percentage of businesses that say they will spend more time on management and leadership activities is broadly consistent with the last edition of the Index, but with a marked increase in those saying they will focus on strategic planning. This reflects a trend across the data that indicates that UK businesses are now increasingly focused on their planning and performance management

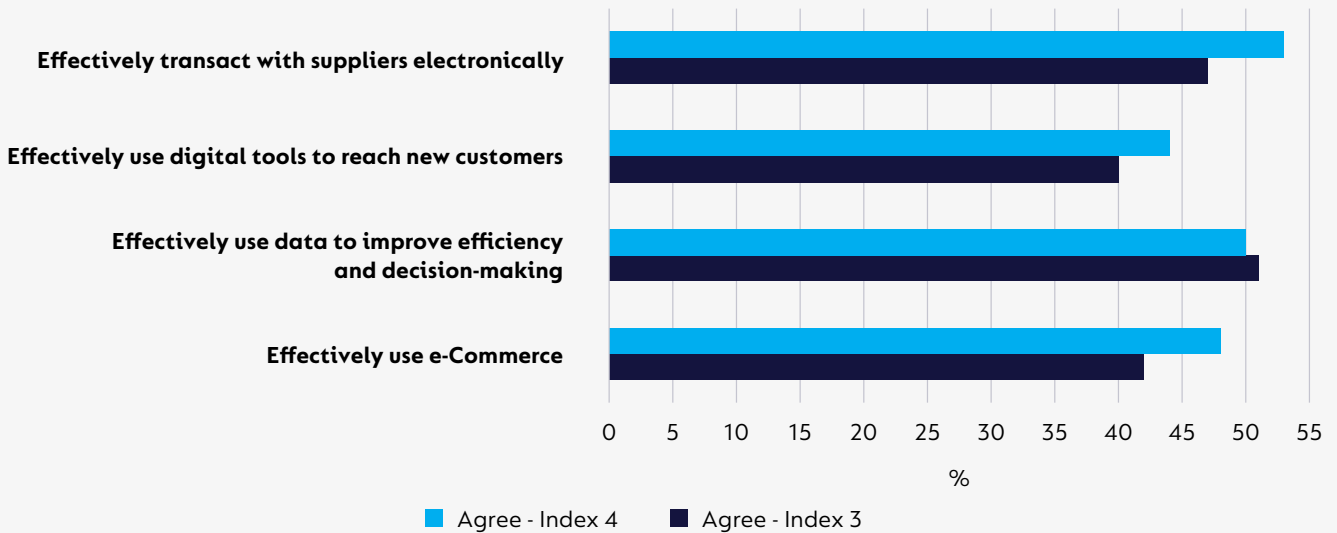
Figure 5: Proportion who will spend more time on management and leadership activities – next 12 months



Technology adoption

Confidence in use of technology by businesses has shown significant increase in a number of categories since the previous edition of the Index. 6% more businesses now believe they effectively transact electronically with their suppliers. There has been a 4% increase in businesses who believe they are effectively reaching new customers using digital tools, and a 6% increase in those that say they effectively use e-Commerce.

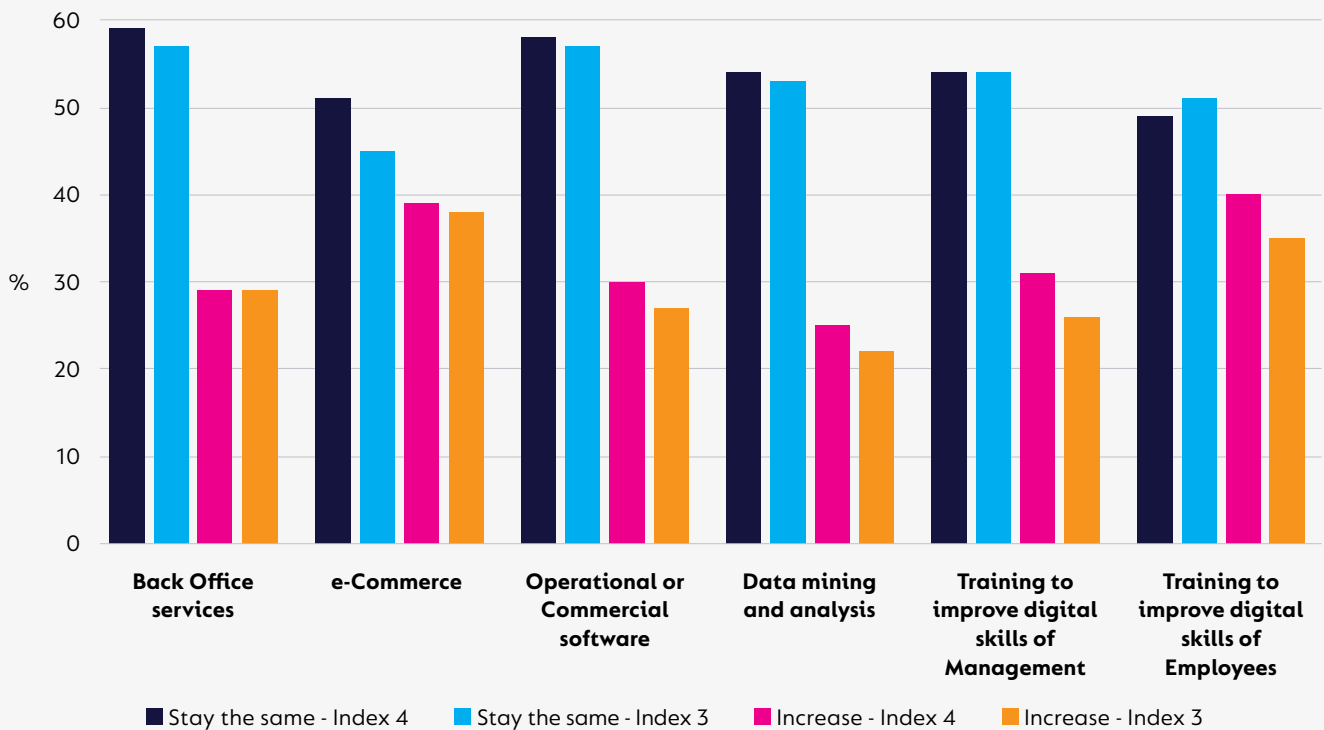
Figure 6: Views on the adoption of technology and its benefits



Businesses indicate that investment in back-office technologies and e-Commerce will maintain current levels over the next 12 months. Two categories where businesses indicate they will increase investment are Operational or Commercial Software (3%) and Data Mining and Analysis (3%).

In terms of digital skills, there is a significant increase in those businesses that say they will invest in training to improve digital skills of management (5%) and also in those who say they'll invest in digital skills of employees (5%).

Figure 7: Planned level of activity and/or investment in technology over the next 12 months



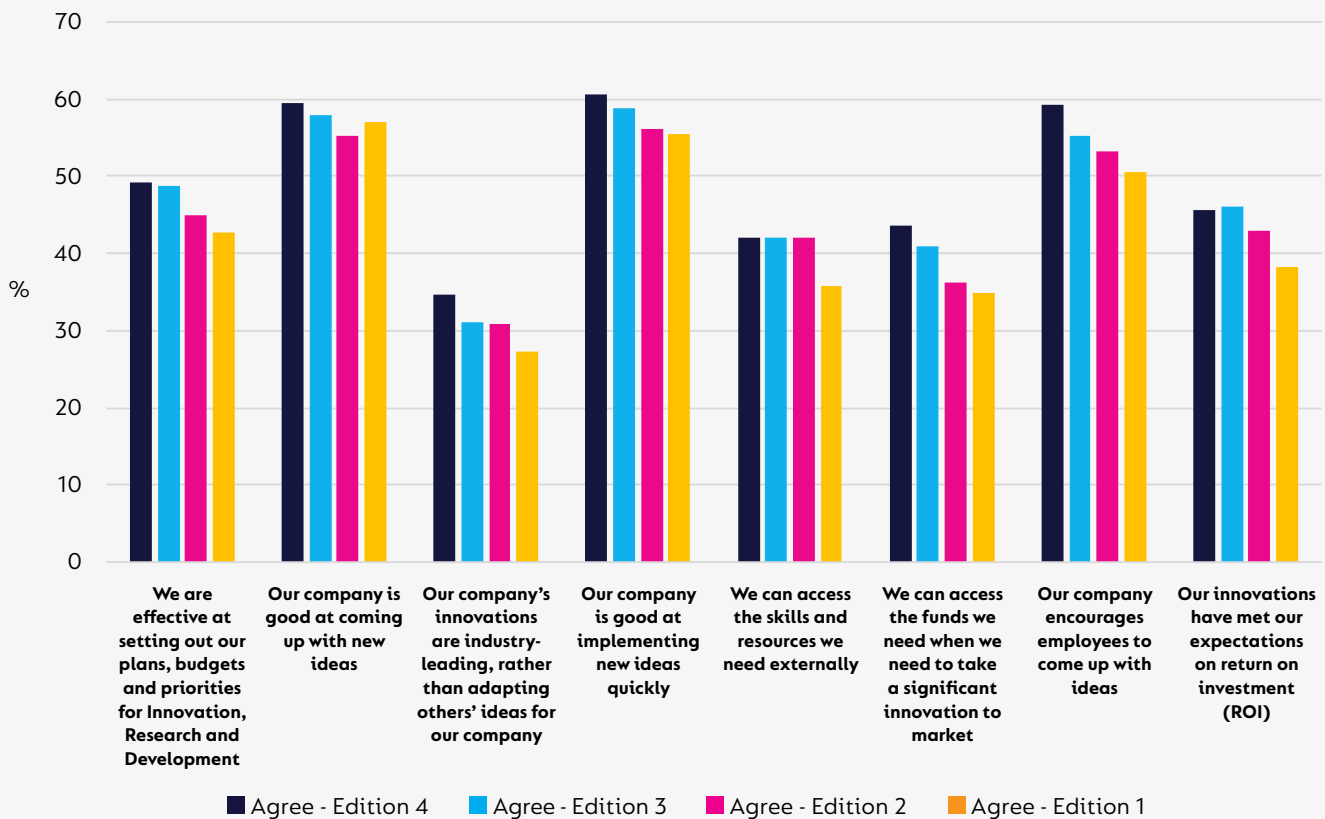
Innovation

Many businesses remain confident in their ability to innovate, with slight increases in companies believing their innovation is effective since the previous Index.

Six in ten (60%) companies believe they are good at generating new ideas and a similar number (61%) believe they are good at implementing those ideas quickly, a slight increase on the previous Index (+2%). Confidence is lowest in business leaders thinking their innovations are industry-leading, with just over a third (35%) believing this to be true.

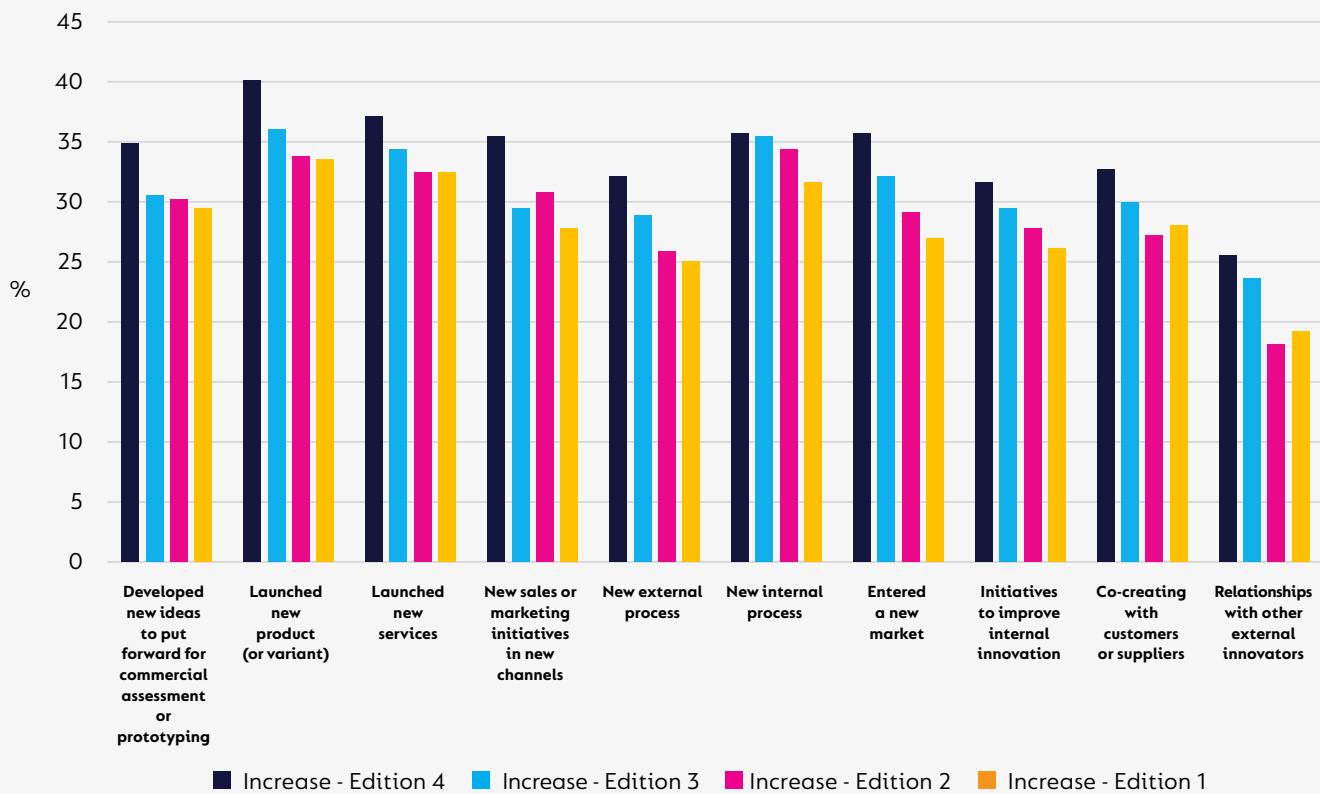
Elsewhere, more than half of companies (59%) say they encourage employees to come up with ideas, an increase of 4% on the previous Index. This reflects companies launching new internal processes to improve their ability to innovate over the last year and since the Index was launched in early 2021.

Figure 8: View of companies on their ability to successfully innovate



These patterns look to continue over the next 12 months. There are significant increases in the proportion of companies planning to launch new sales or marketing initiatives in new channels (+6% on the previous Index), enter new markets (+4%), launch a new product or variant (+4%), or develop new ideas for commercial assessment or prototyping (+4%).

Figure 9: Plans by companies to innovate over the next 12 months



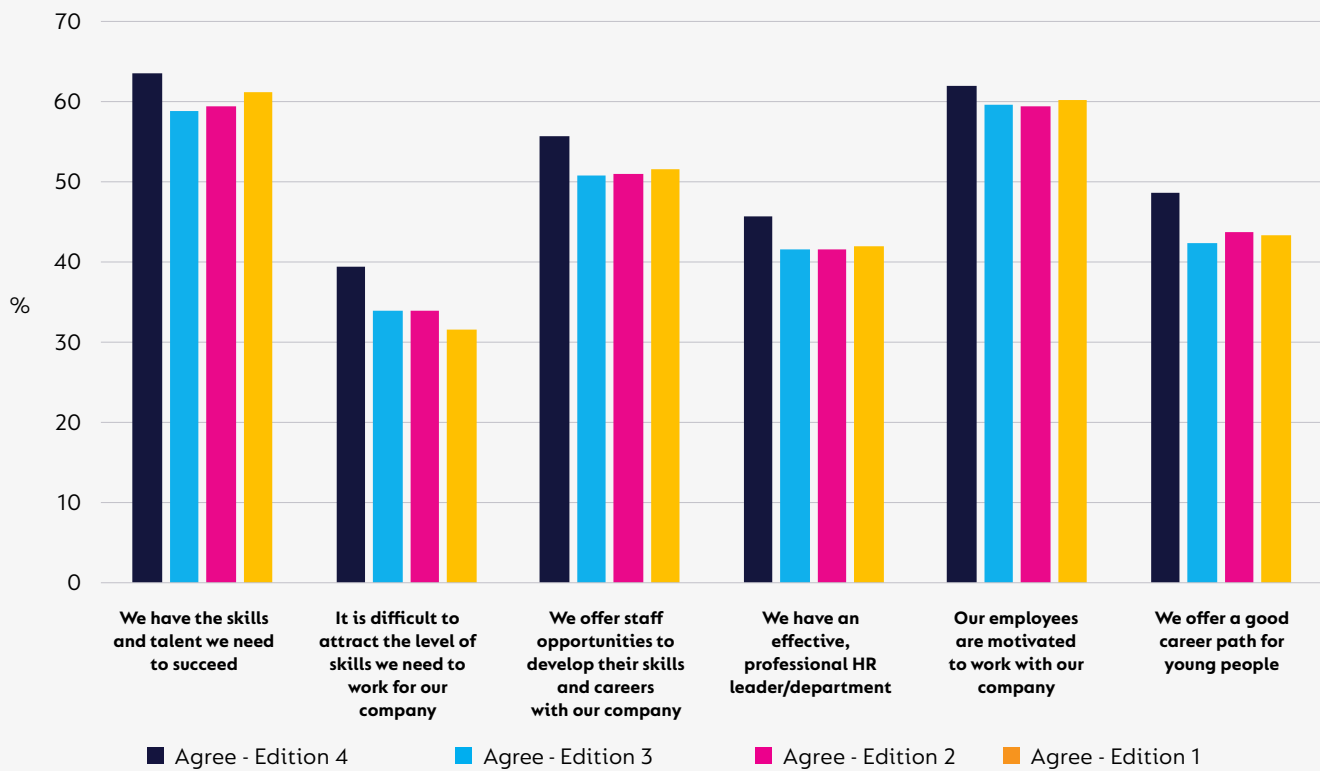
Training, Development and HR

Around a third of companies believe hiring conditions are more challenging than before the pandemic. This was the case in the previous Index and suggests that hiring challenge remains for many businesses.

However, businesses are increasingly positive about the HR environment within their organisations. More than six in ten (64%) believe they have the right mix of skills and talent in their businesses, and more than half (56%) are confident they offer staff opportunities to develop their skills and careers (56%). Both factors have increased by 5% since the previous Index.

Elsewhere, nearly half of companies (49%) believe they offer a good career path for young people. This has increased significantly (by 7% since the previous Index) and suggests businesses are investing in nurturing younger talent.

Figure 10: View of companies on employee recruitment and development

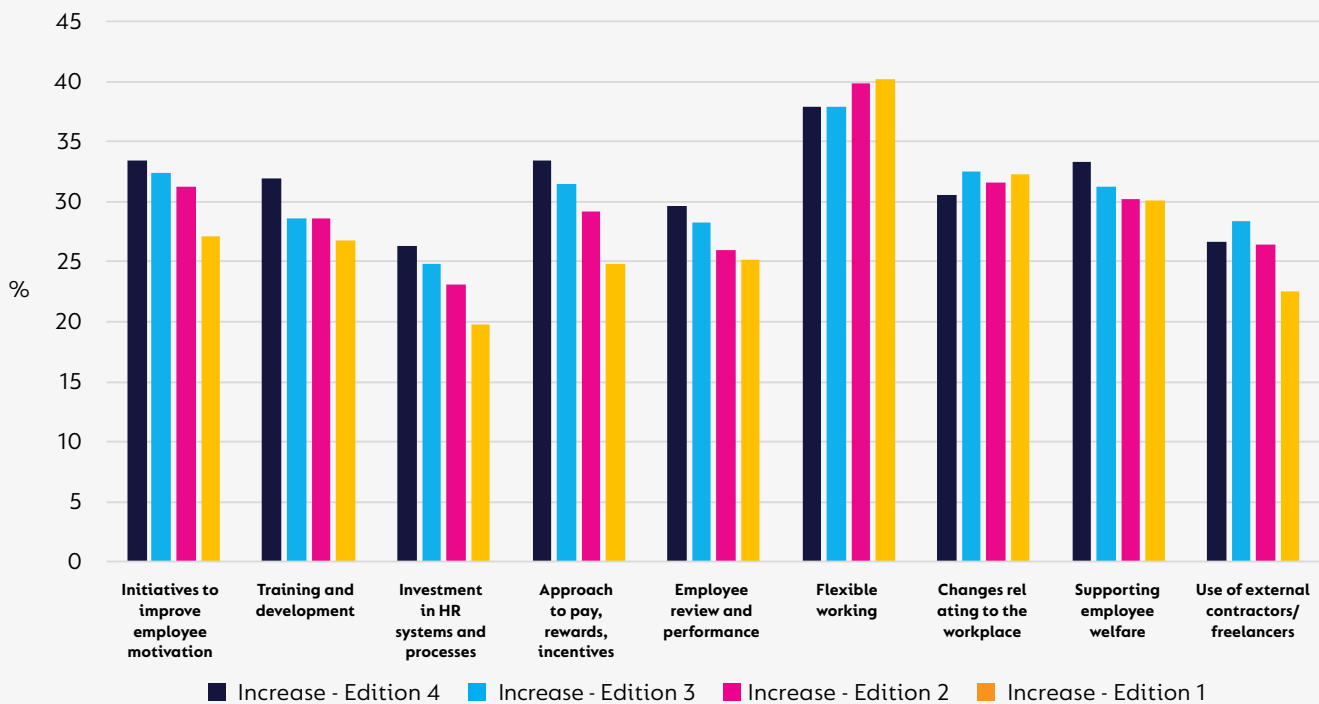


Over the next 12 months, companies plan to continue investing in flexible working (38%), their approach to pay, rewards, incentives (33%), and training and development (32%).

While these are consistent with the previous Index, there has been significant increases since the first Index. This is particularly the case for investing in approach to pay, rewards, and incentives (+8%), initiatives to improve employee motivation (+6%) and HR systems and processes (+6%).

The slight drop in investment in flexible working (3%) since the first Index suggests companies have already introduced more flexible ways of working during the pandemic, but it is worth noting that it remains the number one priority for investment.

Figure 11: Plans by companies to invest in employee recruitment and development over the next 12 months



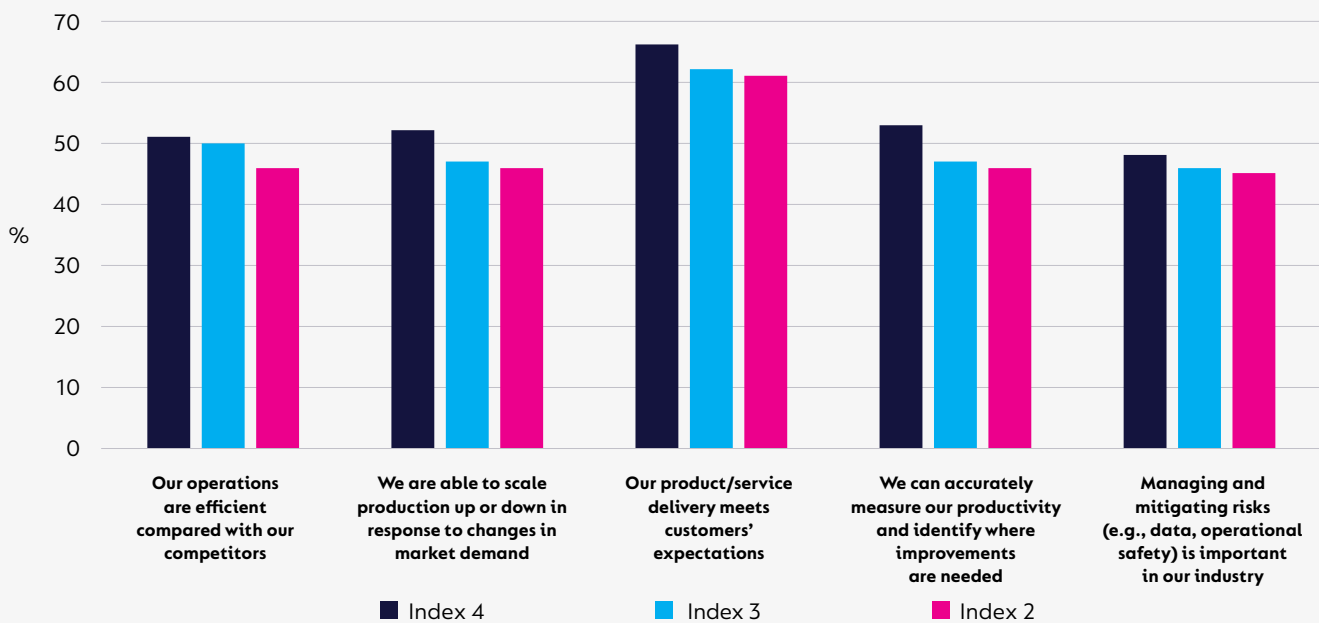
Operating efficiency

A positive productivity trend: more businesses taking action to improve their productivity

This is the fourth edition of the Productive Business Index, and despite the ongoing COVID pressures on businesses, we are seeing a positive trend in business focus on productivity. There has also been a sustained increase in the numbers of businesses able to measure their productivity and identify areas for improvement.

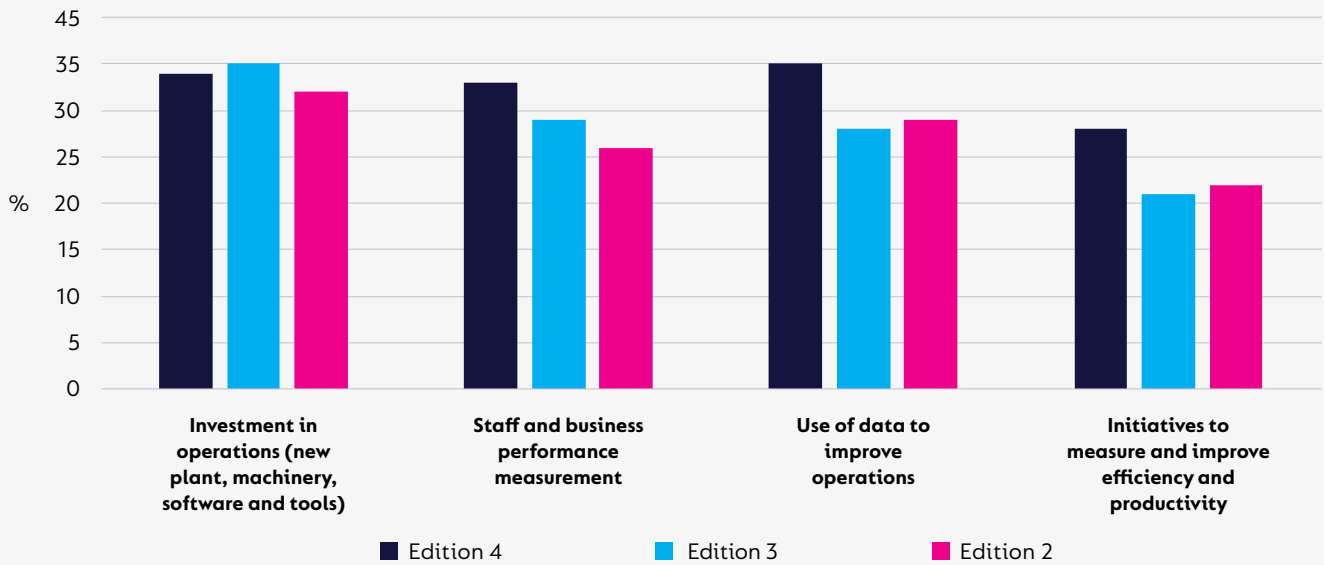
This trend can be seen across many areas of operational efficiency, from managing risks to scaling production. Each category displays a positive trend over 3 editions.

Figure 12: Business assessment of their capabilities around operational efficiency



Businesses also expect to increase their investment and activity around improving operational efficiency over the next 12 months.

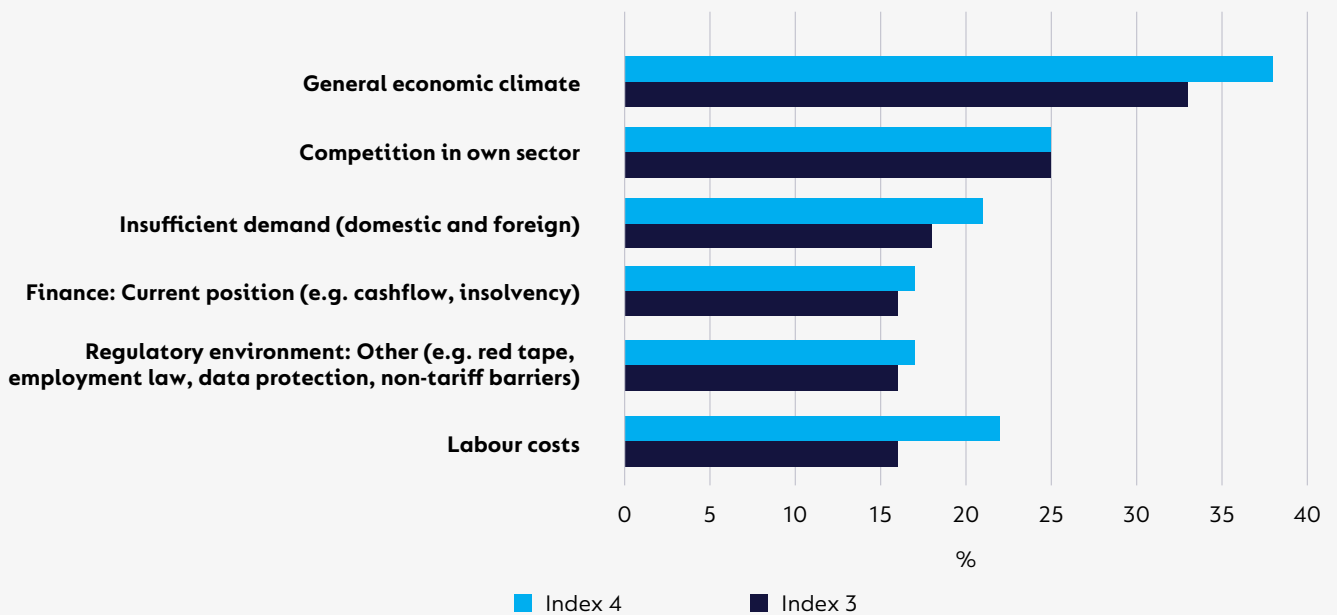
Figure 13: Expectations for activity and investment into operational efficiency over the next 12 months



5. Constraints to business growth

For each edition of the Index, we ask business leaders to identify what they currently see as the main barriers to growth. These barriers to growth have remained reasonably consistent over previous editions. However, we are now seeing some movement. General Economic Climate remains the top barrier to business growth, but also sees a 5% increase in the percentage of businesses identifying it as a challenge. Competition in own sector retains its position as the second most cited barrier. However, Labour Costs has moved from joint fourth position on 16% to a clear third place on 22%, an increase of 6% since the last Index.

Figure 14: Key constraints to business growth



6. New business challenges and demand for business support

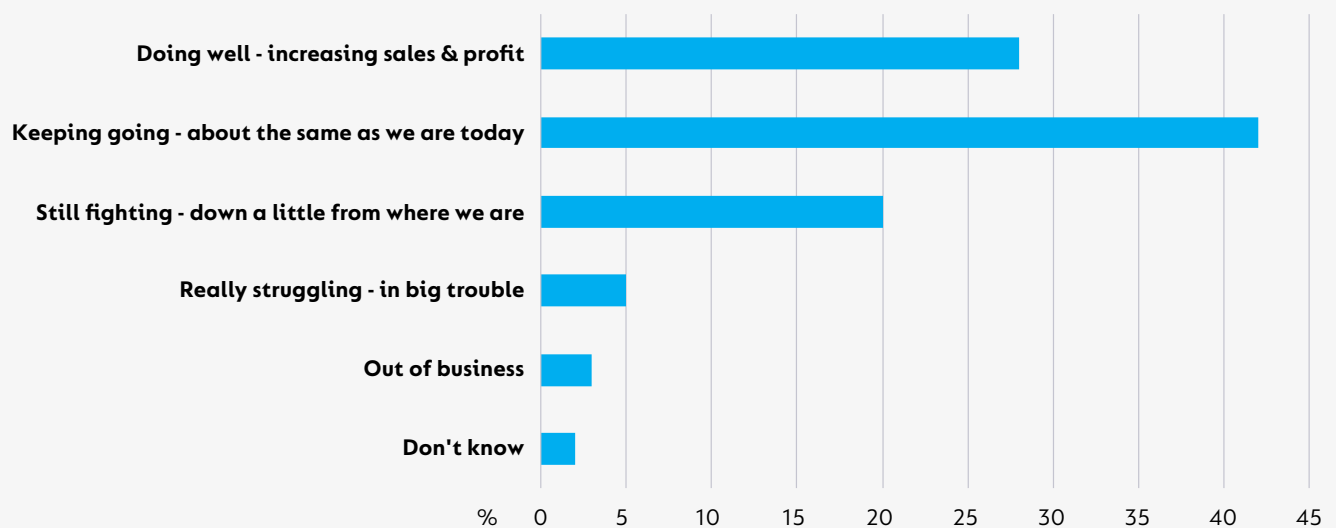
In each edition of the PBI, we ask a series of topical questions to determine the current issues that are keeping small business owners awake at night. In this edition, we have asked about several interrelated topics: how businesses predict they will be doing in 6 months' time, the business challenges they are currently facing, the types of support they believe would be most useful to them, and the barriers to them accessing this support. We also include a note on the problems posed by inflation.

A quarter of businesses believe they will be worse off in 6 months' time

In addition to the regular, detailed questions in the PBI around a 3-month outlook, we asked businesses to characterise where they think their business would be in 6 months' time. The most striking finding was that 25% of businesses expect to be down either a little or really struggling in 6 months' time. Another 3% of businesses say they expect to be out of business by then.

The same percentage (28%) are more positive about the future and expect to be doing well, seeing increased sales and profit.

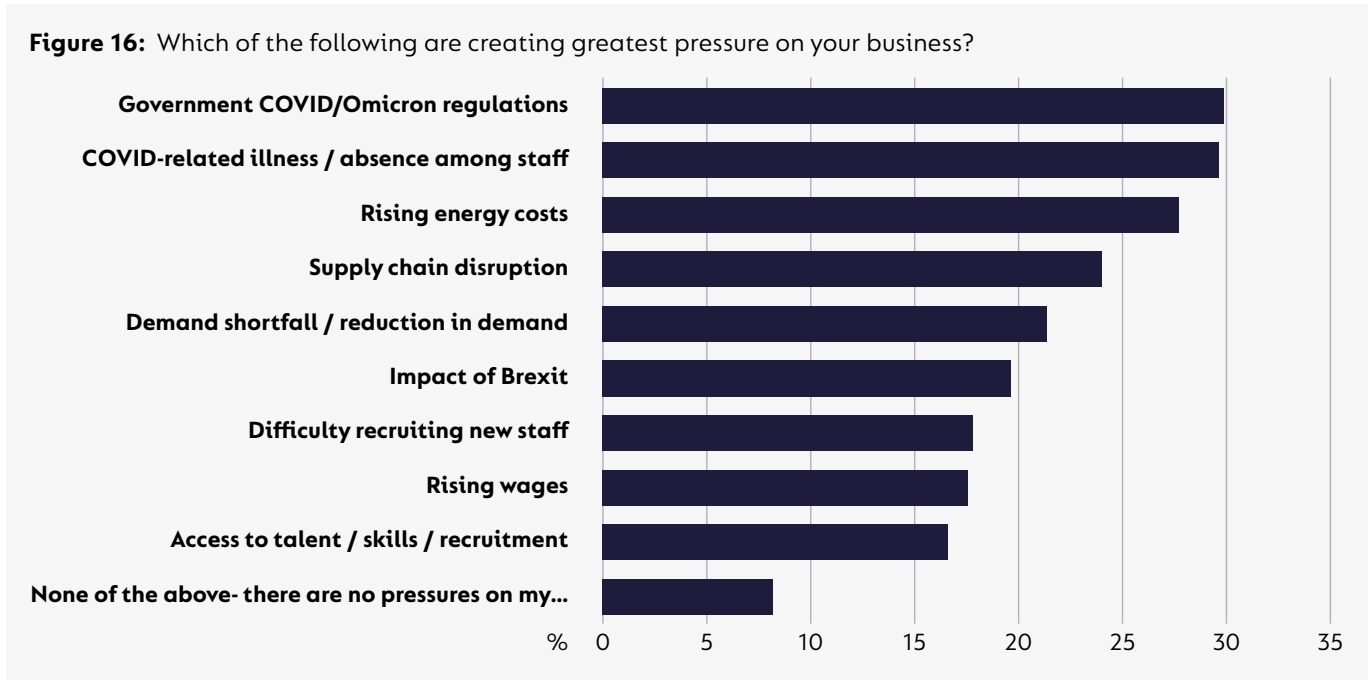
Figure 15: Which of the following best describes where you think your business will be in 6 months' time



This outlook varies significantly by sector and geography, with the numbers of businesses expecting to be doing well as high as 39% in sectors such as Business administration and support services, 35% in Information and communication and 33% in Construction. On the other end of the scale, the positive outlook is as low as 19% in Health, 24% in Education or 23% in Arts, entertainment and recreation.

Businesses are facing a wide range of challenges

Companies continue to face wide-ranging pressures as they emerge from the pandemic. More than half identify COVID regulations and COVID-related illness (30% respectively) as the greatest pressure on their organisation, followed by rising energy costs (28%) and supply chain disruption (24%). With the easing of COVID restrictions, it is likely that this factor is no longer impacting businesses as severely, but staff absences may still be an issue.

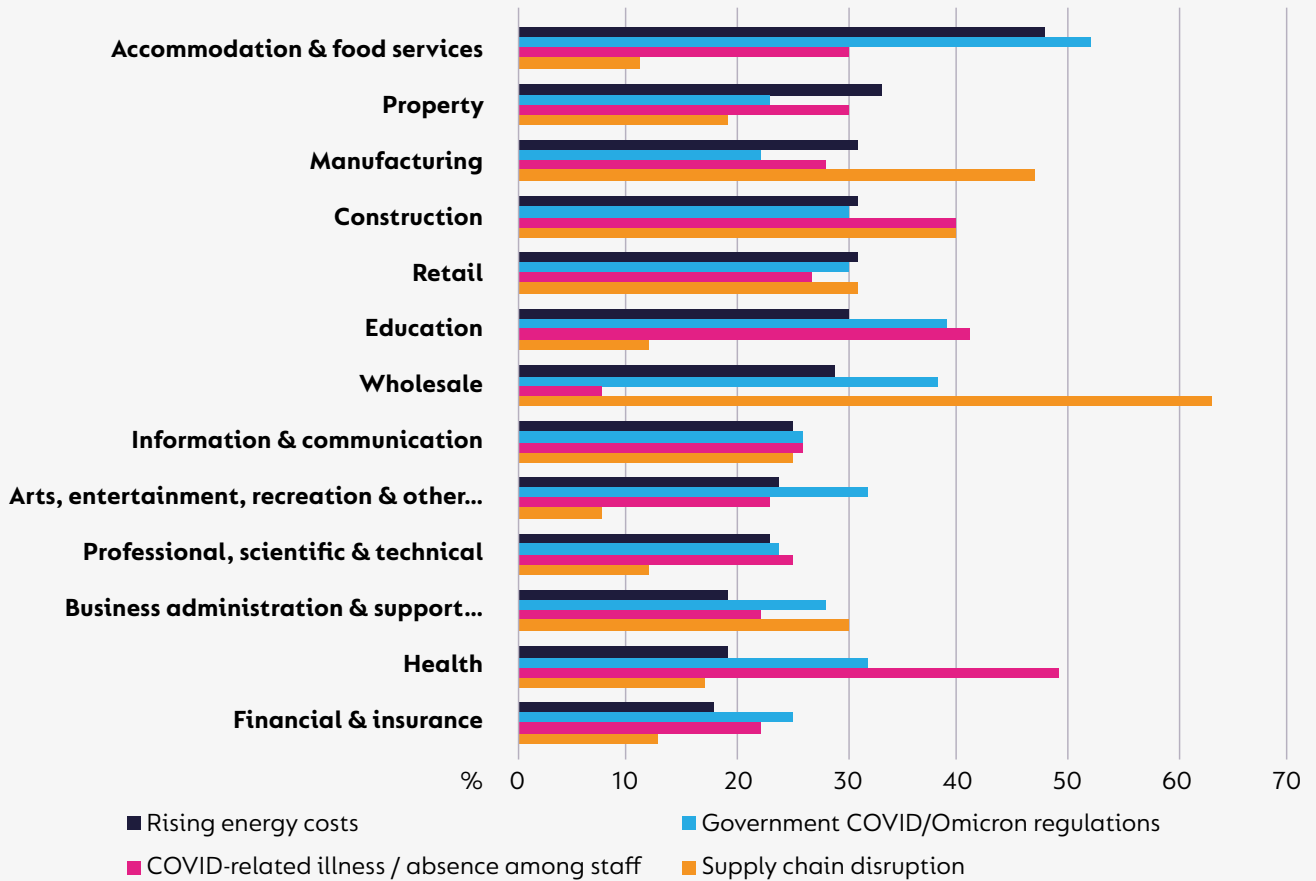


The number of small business leaders citing COVID-related pressures was highest in areas where the Omicron variant was most prevalent or where COVID restrictions were strictest at the end of 2021 – for example, in London, Scotland, Wales and Northern Ireland.

There are also interesting differences between the demographics of business owners and what they see as the greatest pressures on their organisation. For example, female leaders were more likely to cite COVID regulations and difficulty recruiting new staff as their key concern, while male owners were more likely to highlight rising wages and energy costs.

Similarly, businesses citing the rising cost of energy varied by industry. Nearly half of companies in the accommodation and food services sector (48%) say rising energy costs is their greatest pressure. Elsewhere, nearly a quarter of businesses (24%) believe they are continuing to grapple with ongoing supply chain disruptions.

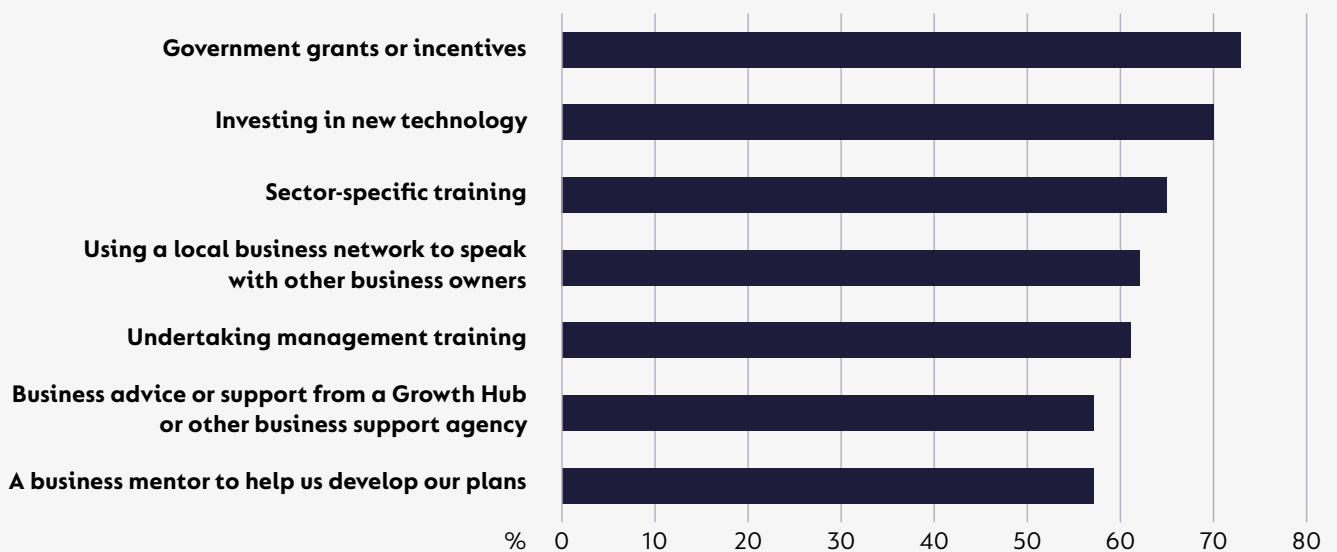
Figure 17: View of companies on the greatest business pressures by industry



These factors show the pandemic is continuing to have a significant impact on companies across the UK. They also demonstrate that rising energy costs and supply chain disruption remain key causes for concern for many SMEs, particularly those in the wholesale, motor trades and manufacturing industries.

What types of support do business owners want?

Figure 18: Views of businesses on which supports are most helpful

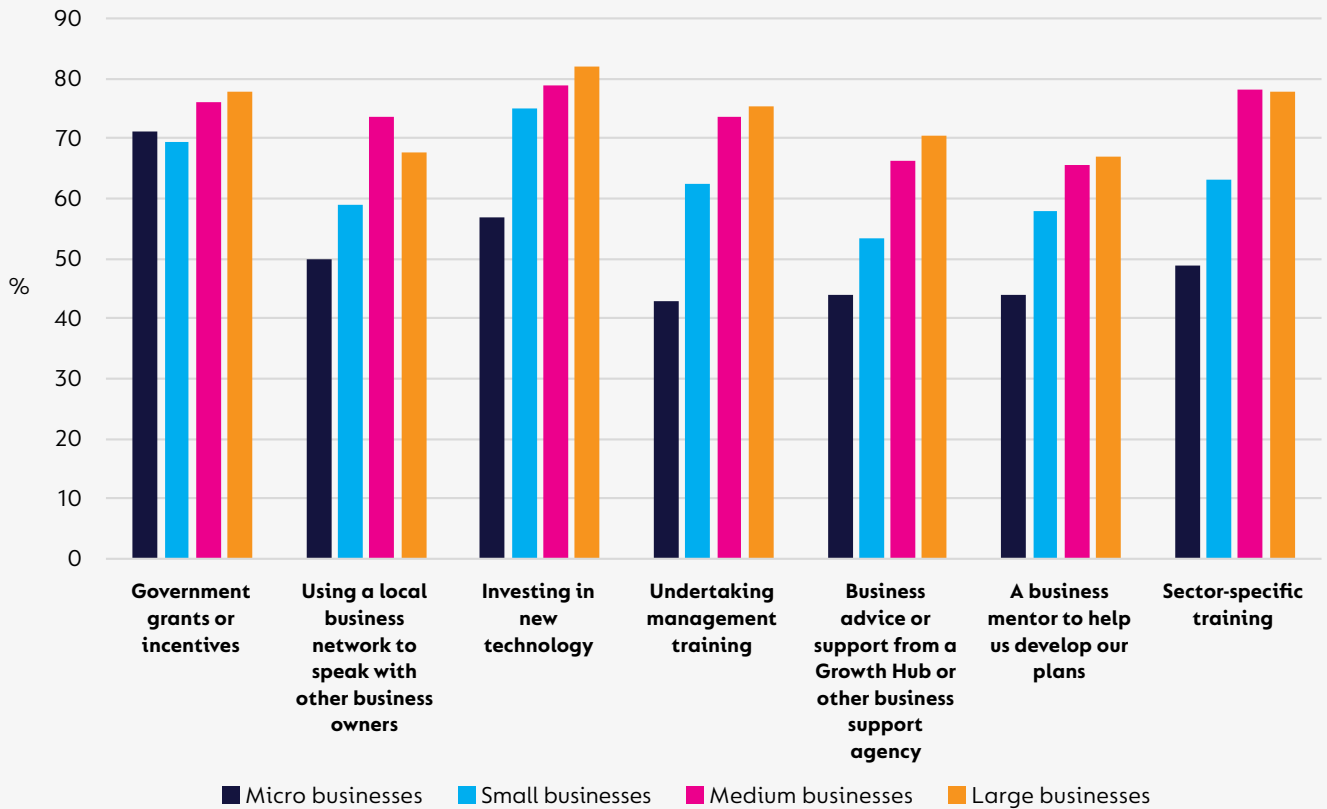


Looking at what support small businesses find most helpful to ease the pressures they face, nearly three quarters (73%) say Government grants or incentives. This likely reflects the critical importance of business support measures that were put in place during the pandemic. The other two most helpful types of support are investing in new technology (70%) and sector-specific training (65%).

There are also differences between the size of a business and which type of support they believe to be most helpful. More than 8 in 10 large businesses (82%) say investing in new technology was the most helpful type of support, while nearly three quarters (71%) of micro businesses cite Government grants or incentives.

Meanwhile, more than three quarters (78%) of medium-sized companies say sector-specific training is most helpful. Interestingly, nearly three quarters (74%) cite using a local business network to speak with other business owners as the most helpful types of support for their organisation.

Figure 19: View of companies on most helpful support by business size



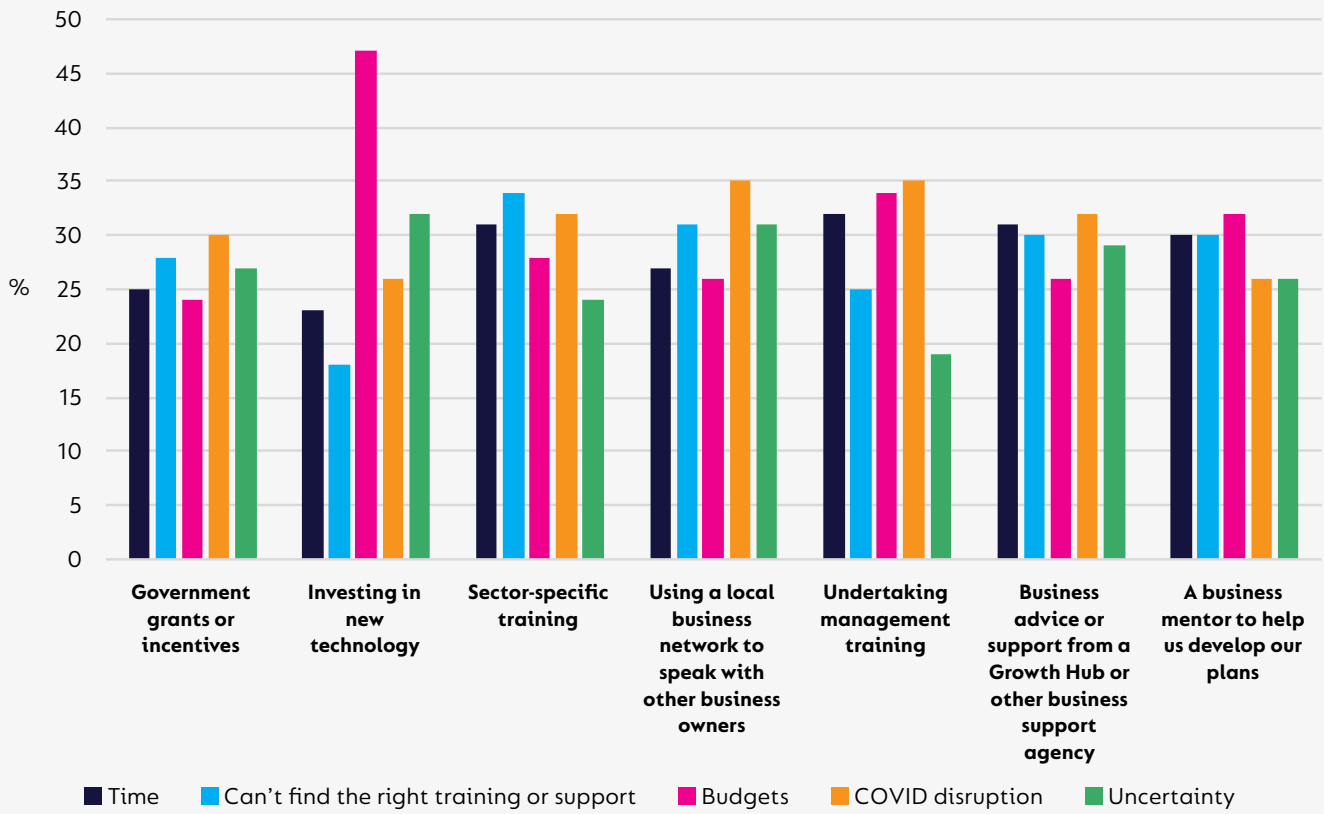
We also asked businesses what was preventing them accessing different types of support. We asked if budget, time, inability to find the right support, disruption as a result of COVID, or too much uncertainty were the main barriers to accessing supports.

More than a third of businesses (35%) cite COVID disruption as a barrier to them undertaking management training and using a local business network to speak with other business owners. Time constraints prevent a similar number from accessing sector-specific training (31%), business advice (31%), or a business mentor (30%).

There are also differences between the demographics of business owners and the barriers they cite to accessing support. For example, male leaders are more likely to cite COVID disruption as a barrier to accessing support, while female owners highlight budget.

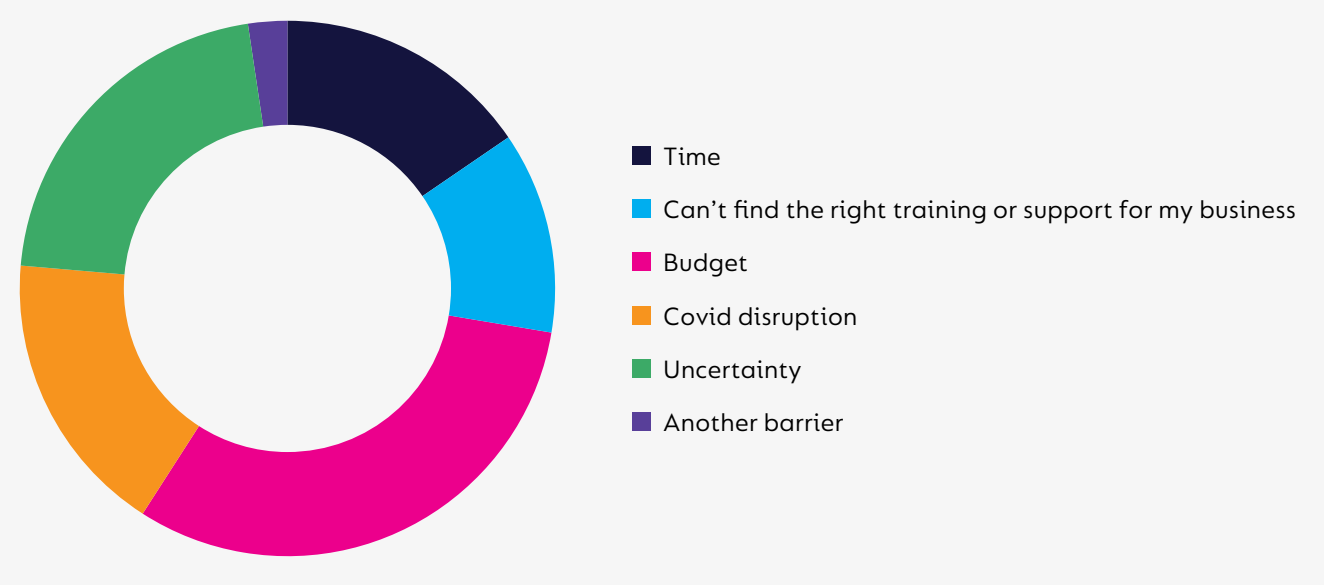
Elsewhere, younger business owners say time is a key barrier to accessing support versus older owners who are more likely to say they cannot find the right training or support for their business.

Figure 20: View of companies on difficulties accessing support



Four in ten (40%) companies say it is difficult to access support to invest in new technology and nearly half (47%) cite budget as the biggest constraint to doing so. This could signal an important role for Government schemes, such as Help to Grow: Digital, which have been set up with the aim of helping small- and medium-sized businesses find and adopt digital technologies.

Figure 21: View of companies on barriers to investing in technology

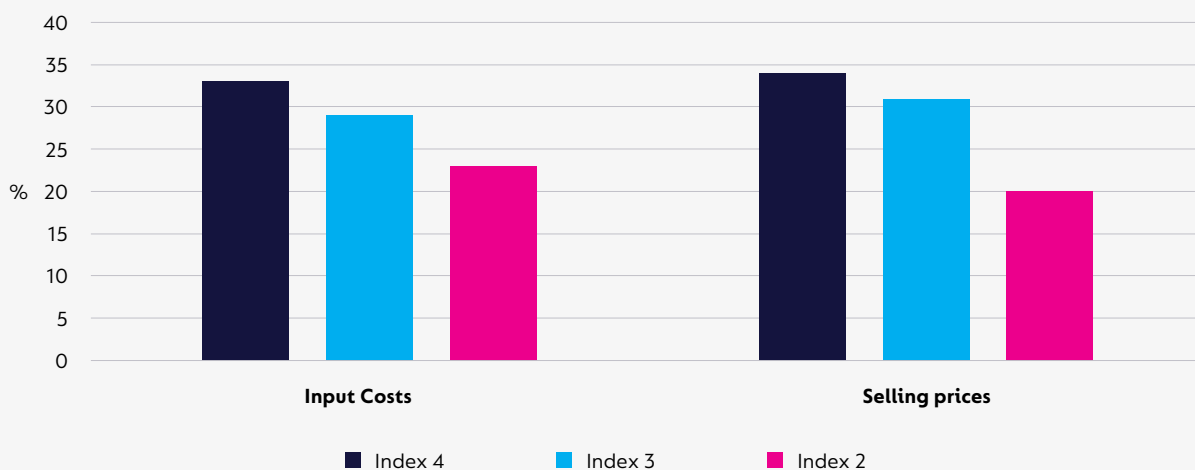


7. The challenge of inflation in 2022

Concerns regarding input costs and selling prices have been increasing in each edition of the Index.

More than a third of companies forecast increases in input costs (33%) and selling prices (34%) in the current edition. This is an increase of 4% and 3% respectively from the last Index and an increase of 15% and 18% on the first Index. We expect this challenge to increase over the coming months as the on-going energy crisis and wage inflation feeds through to selling prices.

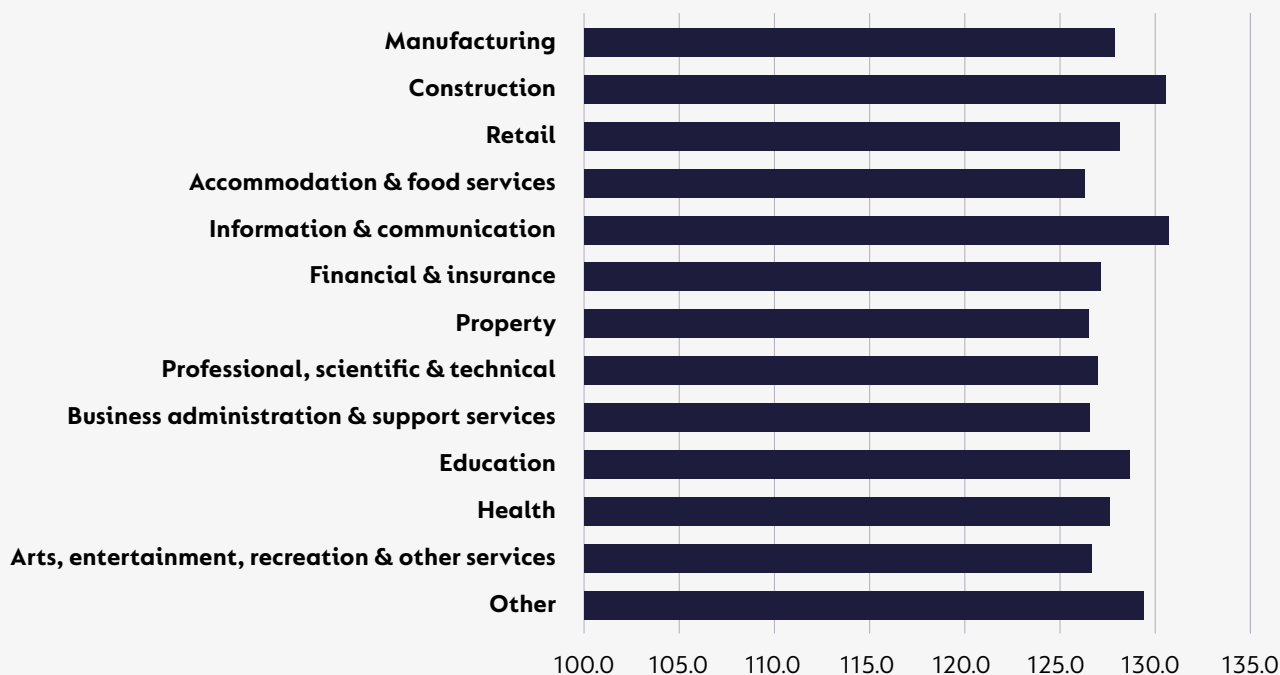
Figure 22: Excluding normal seasonal patterns, how do you expect the following factors to change over the next three months? Percentage that predicts an increase



8. Looking across industries

As one might expect given the nature of the various challenges businesses are facing, the picture across industry sectors is uneven. Sectors such as Construction, Information and communication and Business support and admin services are performing strongly, all scoring 130 and above on the Index. Accommodation and food services, Property, and Arts, Entertainment, Recreation and Other Services are the lowest performing sectors.

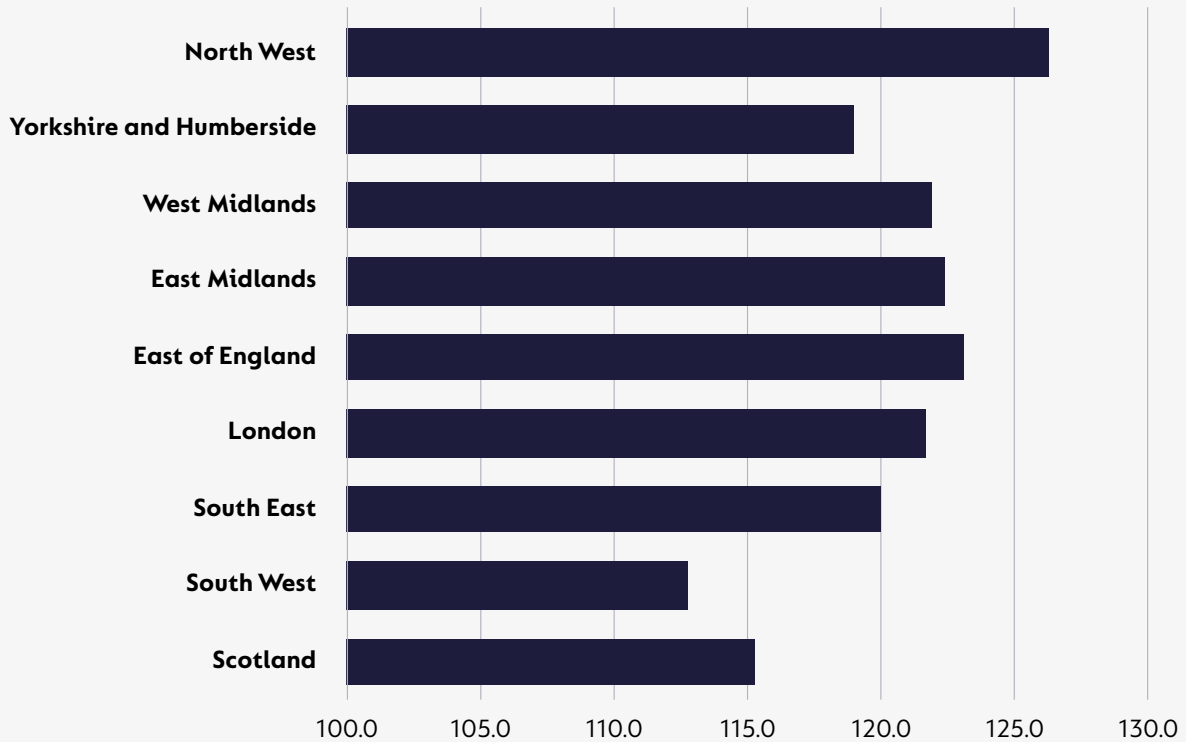
Figure 23: Headline Productive Business Index Score by Selected Sectors



9. Region by region

Across selected regions, we see a similar picture to the previous edition of the Index. Once again, several regions are outperforming London and the South East. Those scoring most highly are the North West and the East of England, with the South West scoring lowest from this selection of regions.

Figure 23: Headline Productive Business Index Score by Selected Regions



Three key trends for businesses over the coming months

1. For the fourth consecutive edition of the PBI, we have seen increases in input costs, including energy costs and labour costs. In this edition, we have observed how this is feeding through to increases in selling prices and potentially a deteriorating financial situation for businesses. With businesses predicting further increases over the next 3 months, this trend shows no sign of abating. A critical challenge for businesses will be their capacity to balance maintaining margins and market share while being able to cover their increasing costs. Aside from the fundamental issue of business survival, reduced retained earnings will lower businesses capacity for investment.
2. The growing importance of technology to UK businesses continues to be demonstrated throughout the PBI. Businesses appear to be growing more comfortable with tech and are increasing the range of types of tech solutions within their business. It's reassuring to see plans for increased investment in digital skills for both management and employees. There are two critically important points revealed in this Index. The first is that businesses have clearly identified technology as something that can help their business, with technology coming second only to Government grants in the ranking of useful supports. The second point is that businesses identify availability of funding as a major impediment to adopting tech. This is where the Government's newly launched Help to Grow: Digital scheme can play an important role in helping bridge this funding gap and enable businesses to access the tech they need.

3. A hugely encouraging pattern that's emerging from the Index is the increasing focus UK businesses have on planning, strategy, and efficiency. There are increases in investment in plant, machinery and tech, as well as processes. Critically, there is greater levels of activity in long-term planning as well as performance management and measurement. It would appear that the challenging business environment of the last two years has compelled business to focus more closely on managing and measuring their performance. This is supplemented by increasing numbers of businesses using data analysis and productivity improving tech in their businesses. If this trend in focusing on the fundamentals of the business, measuring performance and seeking efficiencies continues, we can see two important benefits. The first is that the increasing efficiencies may go some way towards offsetting the increased costs of doing business in an inflationary environment and help nudge businesses in a constructive way towards the sustainability and net-zero agenda. The second benefit is that this may signal an important mindset shift amongst business decision-makers that leads to a longer-term positive impact on productivity.

10. Model & Methodology

The Be the Business Productive Business Index (“Headline Index”) is comprised of four clearly defined elements:

1. Performance of business;
2. Expected performance of business;
3. Actions taken to drive sustainable growth;
4. Planned actions to drive sustainable growth.

Working with Oxford Economics, we have developed a high-level nested structure for the Headline Index **around two core themes (1) Business Tendency** (a ‘PMI’ for SMEs) and **(2) Business Capabilities**, exploring key capabilities, and actions taken, driving sustainable and productive growth.

For each theme, the Headline Index will include **backward- and forward-looking components** across the same underlying topics. This will provide an attractive symmetry to the index structure and allow the user to delve deeper e.g., how does the current index value compare to expectations for the future, which helps to follow and predict turning points in the business cycle.

This framework also facilitates the development of **separate indices for each theme** e.g., an **SME Business Performance Index**, which focuses on business performance only, and an **SME Business Capabilities Index**, which focuses on the actions SMEs have and are taking to drive productivity growth.

The purpose of the Headline Index is to provide an indication of the **direction of change**, as well the level of conviction in that direction of change. It is composed of responses to questions framed using a **Likert scale** i.e., multiple choice scale from one extreme to the other, with clearly defined positive and negative alternatives.

The Headline Index will be formed using a **‘diffusion Index’** methodology. A diffusion Index aggregates multiple indicators by examining whether they are trending upwards or downwards, allowing the combination of multiple and unrelated time series data into a common indicator. This is often used to present business survey data e.g., PMIs. It is envisaged that the diffusion Index will be calculated as follows:

Index = 2 * (percentage of respondents reporting an increase) + (percentage of respondents reporting unchanged). This means the Headline Index will vary from 0-200, whereby 100=no-change, while values above 100=a rising trend and values below 100=decreasing trend.

In addition, while not incorporated within the Headline Index, our framework **includes a third** theme on **(3) Business Constraints**, exploring the different external factors that are inhibiting growth in SMEs). This feeds into the **SME Business Constraints Index**.

Survey Data

The data inputted to the model is derived from a large-scale survey of 1004 directors and above, working in companies of 2 - 249 employees, conducted by Opinium between 17 – 20 January 2022.

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