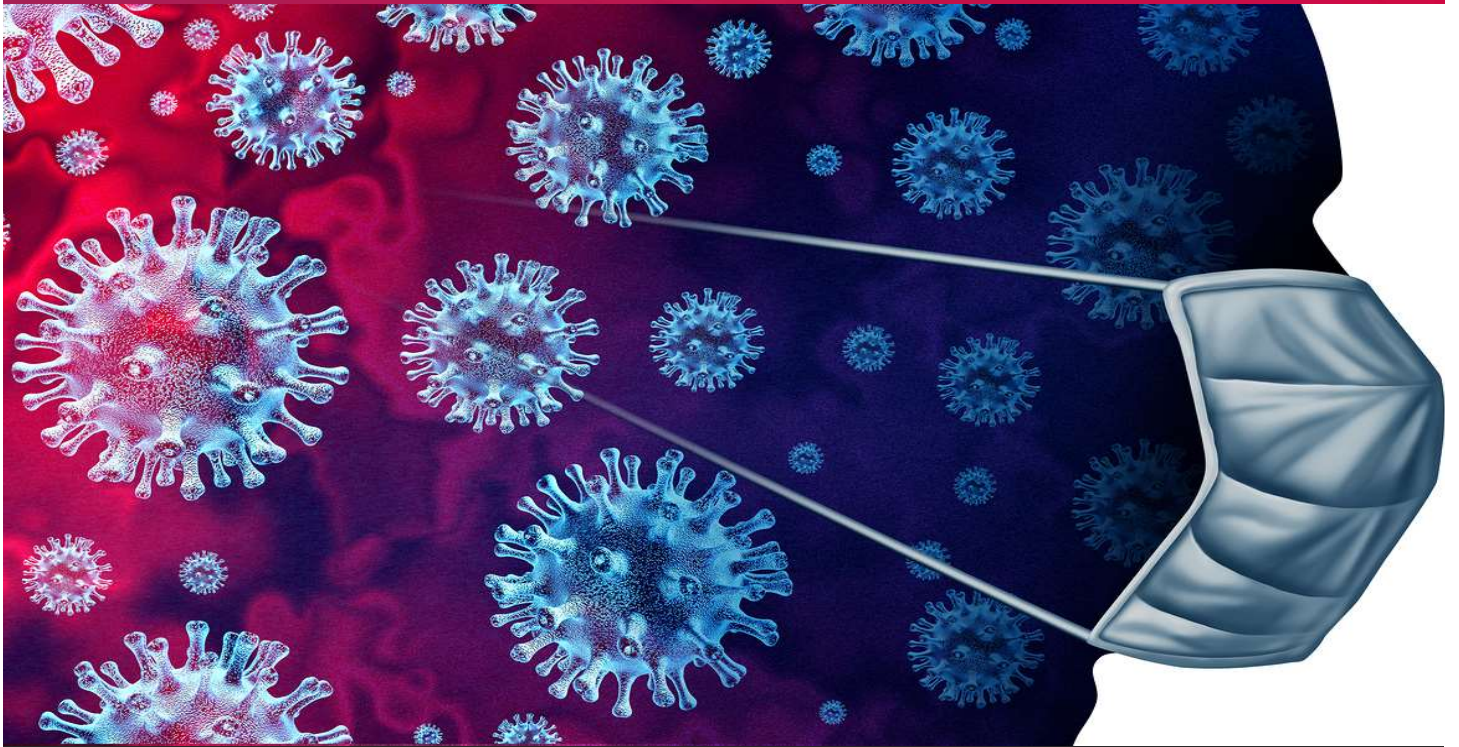


Eureka!

ILLUMINATING RESEARCH



Measuring the true impact of COVID-19 on the plumbing and heating sector



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A unique cross sector collaboration, devised by Eureka! Research, to understand the challenges faced by small business owners at this unprecedented time. Leading sector brands and associations partnered with Eureka! to deliver the survey to the trade.

CIPHE
Chartered Institute of Plumbing
and Heating Engineering

APHC
ASSOCIATION OF PLUMBING &
HEATING CONTRACTORS LIMITED

 **Vaillant**

Installer

Glow•worm



BRISTAN

HHiC
HEATING & HOTWATER
INDUSTRY COUNCIL

**Salamander
Pumps** 

 **GEBERIT**

1,115 interviews completed online
with owners of plumbing/ heating businesses
across the UK during early April 2020.





Exec summary

- We have gathered the views of small business owners and sole traders in the plumbing and heating industry at a time of extraordinary change. The sector is currently operating at about 13% of what it would in normal circumstances, with considerable work being postponed even if it could be carried out within official guidelines
- Eureka! estimate, based on the loss of turnover reported to us, that each day of lockdown currently represents £47m of lost P&H 'business' to the economy
- Installers are rapidly finding new ways of operating, particularly those who feel comfortable offering essential 'emergency' services to householders. Less than half are offering a full emergency call-out service, with many being highly selective about what they respond to
- The majority of businesses are most worried about immediate sources of cashflow and being able to pay themselves and staff in the short term. Larger businesses, in particular, are worried about being paid for work already completed and this could act as a barrier when restrictions are eased. Two thirds of operating businesses are concerned about getting hold of the materials and product they need for jobs
- Operational businesses are on their own 'front line' and are adopting a wide range of strategies to manage health risks. Half say they would consider working for existing customers as the lockdown continues. Despite putting strong measures in place, the risk of infection is a source of natural concern. 3 in 10 business owners cite potential exposure to COVID-19 already and larger businesses in particular are having to deal with staff absenteeism and the associated risks (1 in 7 larger businesses)
- Businesses are utilising a wide range of information sources to keep abreast of COVID-19 developments and to guide them on how and whether to operate. Endorsement for the quality of this information is lukewarm – businesses would appreciate more coherent and consistent information relevant to them
- Although nearly three-quarters intend to use the Government's Furlough (CJRS) or Self Employment Support Scheme, around half of the sector feel the financial measures don't go far enough. Around 19,000 businesses are potentially due to 'fall between the cracks' and will not benefit under current aid measures at all
- Despite the economic climate being fairly optimistic going into this crisis, 4 in 10 P&H businesses are very nervous about business conditions in 6-12 months, particularly sole traders and small businesses
- As the health and economic situation rapidly evolves, we believe it would be expedient to 'check in' with installers again in coming months – this would give us an opportunity to measure changing work practices, support needs, and business recovery

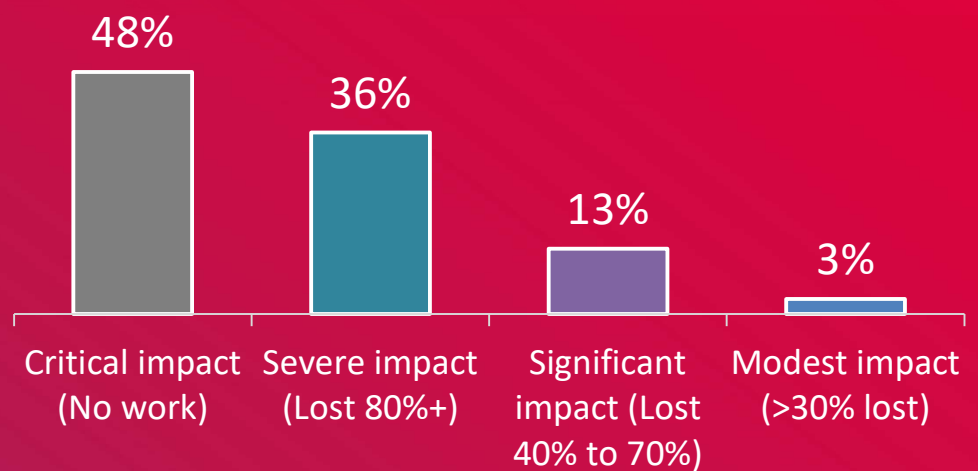


Economic impact



P&H sector is at **13%** of operational capacity

97% report a significant or worse impact on their normal workload



Turnover hit

Usual business performance



£142,000

Annual turnover

£560

Daily equivalent

During COVID-19 lockdown



£21,600

Annualised turnover

£85

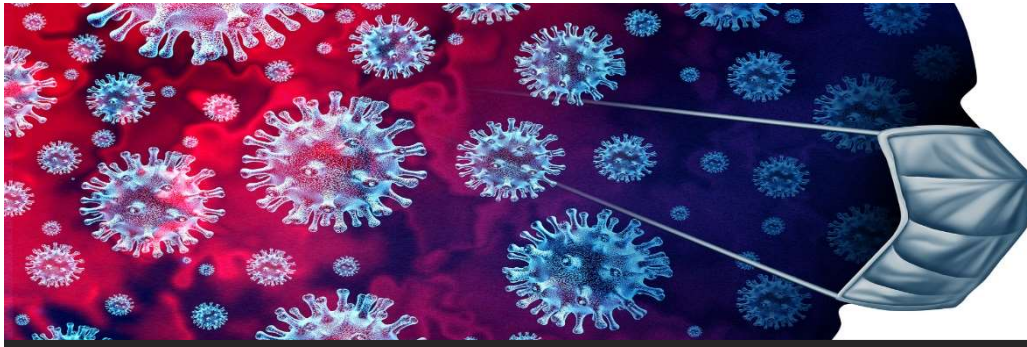
Daily equivalent

£47m lost to the economy per day of lockdown ^a

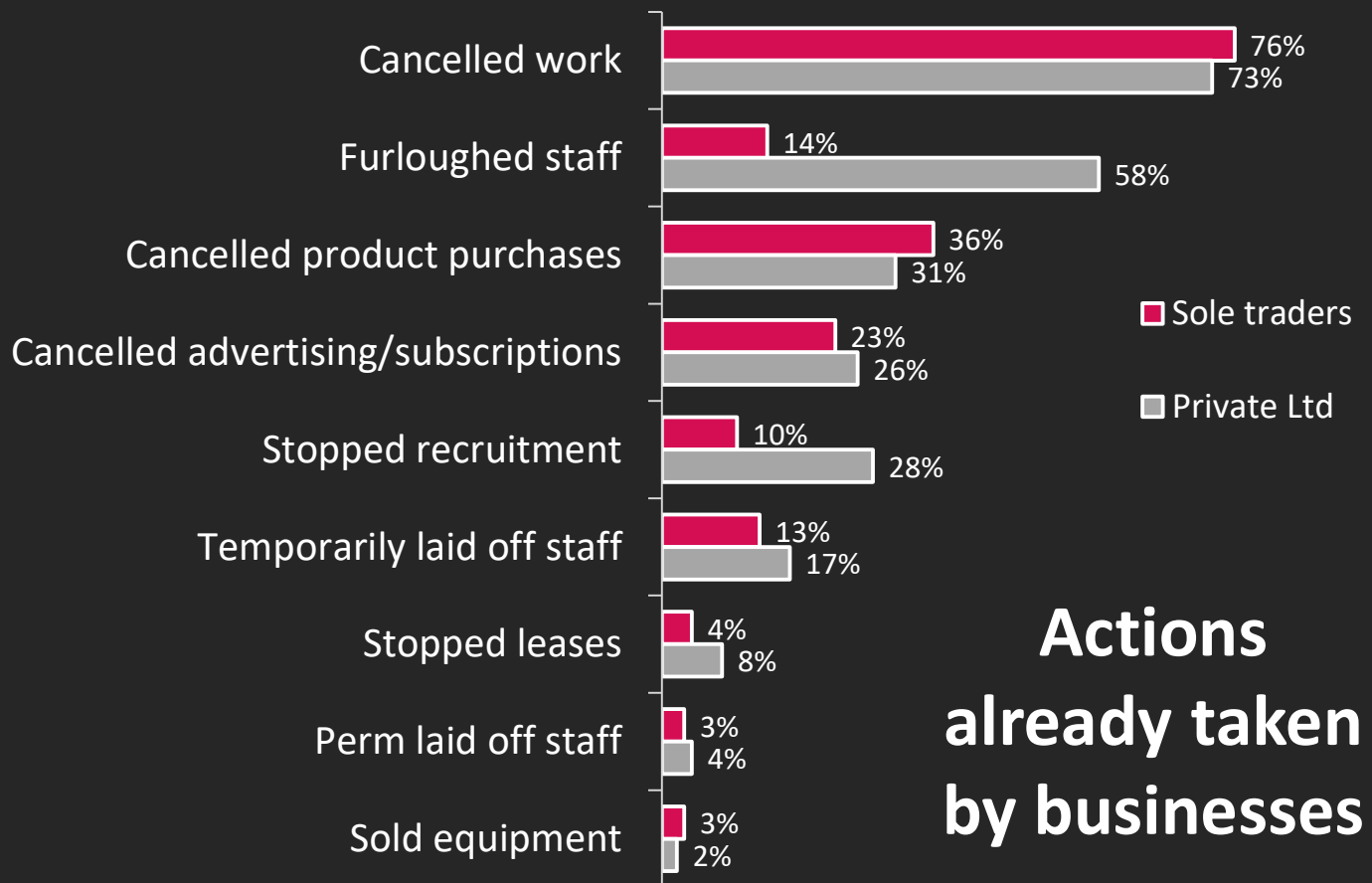
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Q4. What impact has Coronavirus had on your normal workload? Please use the scale of 1 to 10, where 1 is no impact and 10 is severe impact. Base: 1115

Q32. Approximately, how much did your business turnover last tax year? Valid base: 940



Business impact



Ltd Planning



16%

Cancelling subscriptions



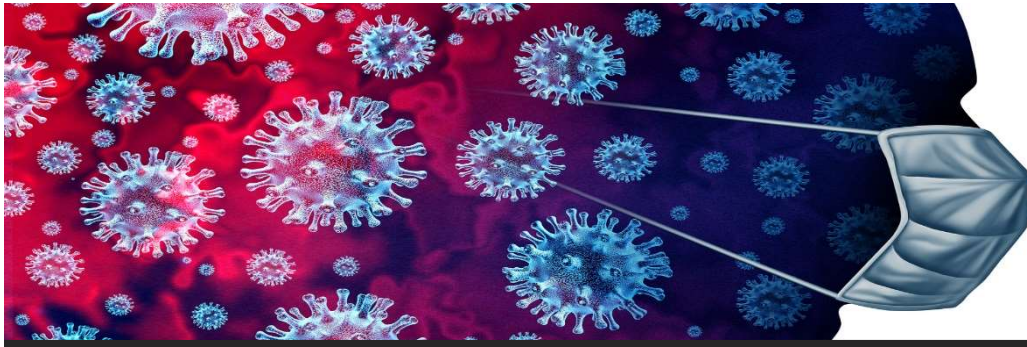
13%

Cancelling advertising



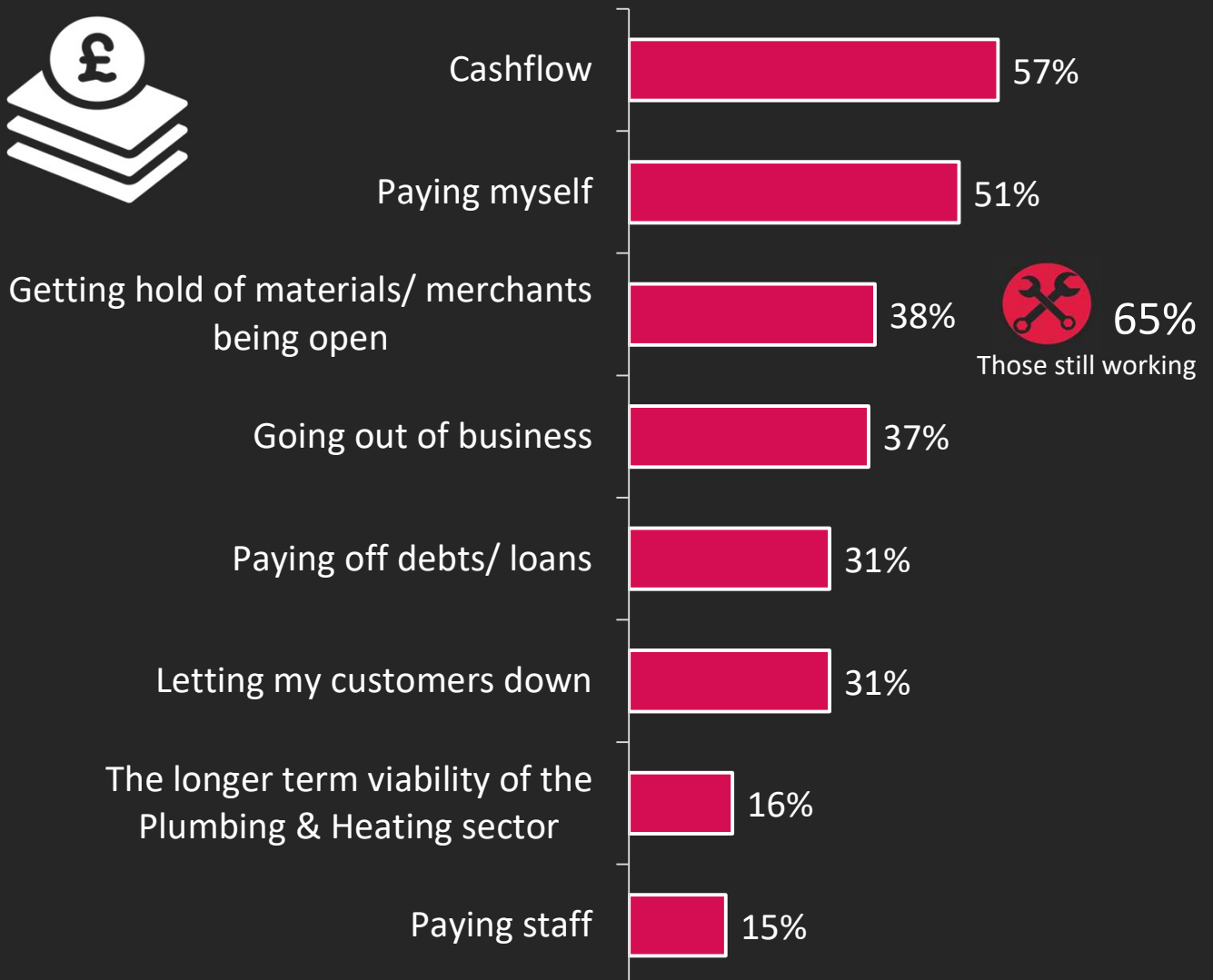
12%

Stop leases (e.g. vans)



Business concerns

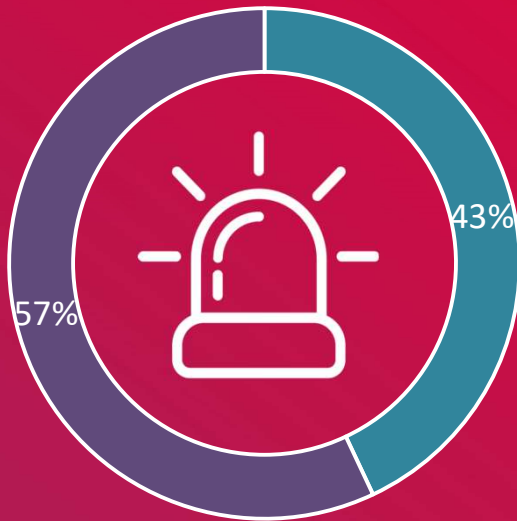
Almost 6 in 10 cite cashflow as a key concern facing their business today with the ability to pay themselves a close second. For those still attempting to be active, the lack of materials is a key issue to many. Nearly 4 in 10 state that 'Going out of business' is a serious concern





Emergency work

Just 4 in 10 are offering a 'normal' emergency service. These are the job types considered as 'emergency':



■ Yes, to all customers

■ No, or just to selective customer types



88%
Boiler/
heating



39%
Quick & easy
repairs



76%
Leaks/ burst
pipes



37%
Toilet
issues

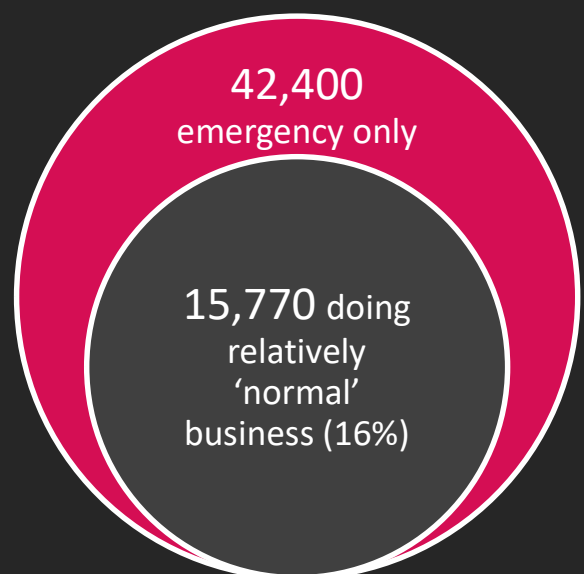


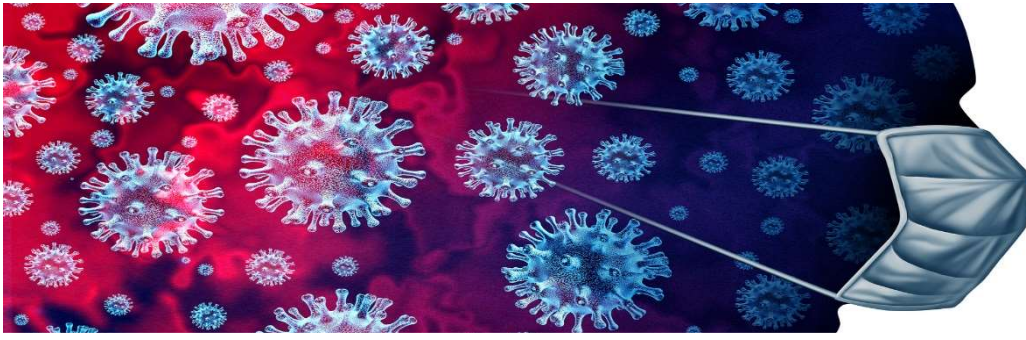
Fixing householder's DIY mistakes not seen as an emergency (17%)

This means that 42,400 P&H businesses are still potentially out there delivering vital work to all, where required



Data suggests that these tend to be younger installers and heating engineers (aged 40 yrs or less)





Focus group

"If you give customers advice over the phone and they flood the house, it would come back on me. And what if I'm actually furloughed?"

"It's stuff that needs to be done rather than stuff I'd actually like to do"

"It came up at a time when things should be emerging, the Spring, confidence in spending had been going up"

"This is unprecedented, think of the credit crash all of a sudden no one had money, this is completely different – I think people still have money and will be able to spend it"

Finding a new way of trading

"If it's non essential the merchants won't sell it to us at the moment ... and definitely Account holders only rather than full retail"



YouTube - Search 'Eureka Research Ltd'



Exposure to COVID-19 symptoms



8%

Have had COVID-19 symptoms themselves



17%

Family or friends have



9%

Staff or other tradespeople have



10%

Customers have



31%

of Business owners have been exposed to COVID-19 symptoms so far in some way (c. 30,000 biz owners)



1 in 5

Concerned about having to work in close proximity

Exposure is potentially even more of an issue in larger firms who also have to manage staff absenteeism

15% of these businesses already report staff having coronavirus symptoms

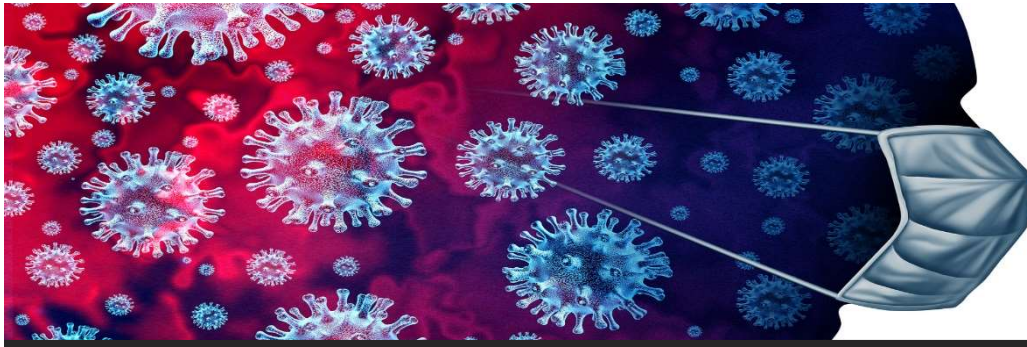


with a turnover £200k+ report any exposure to COVID-19

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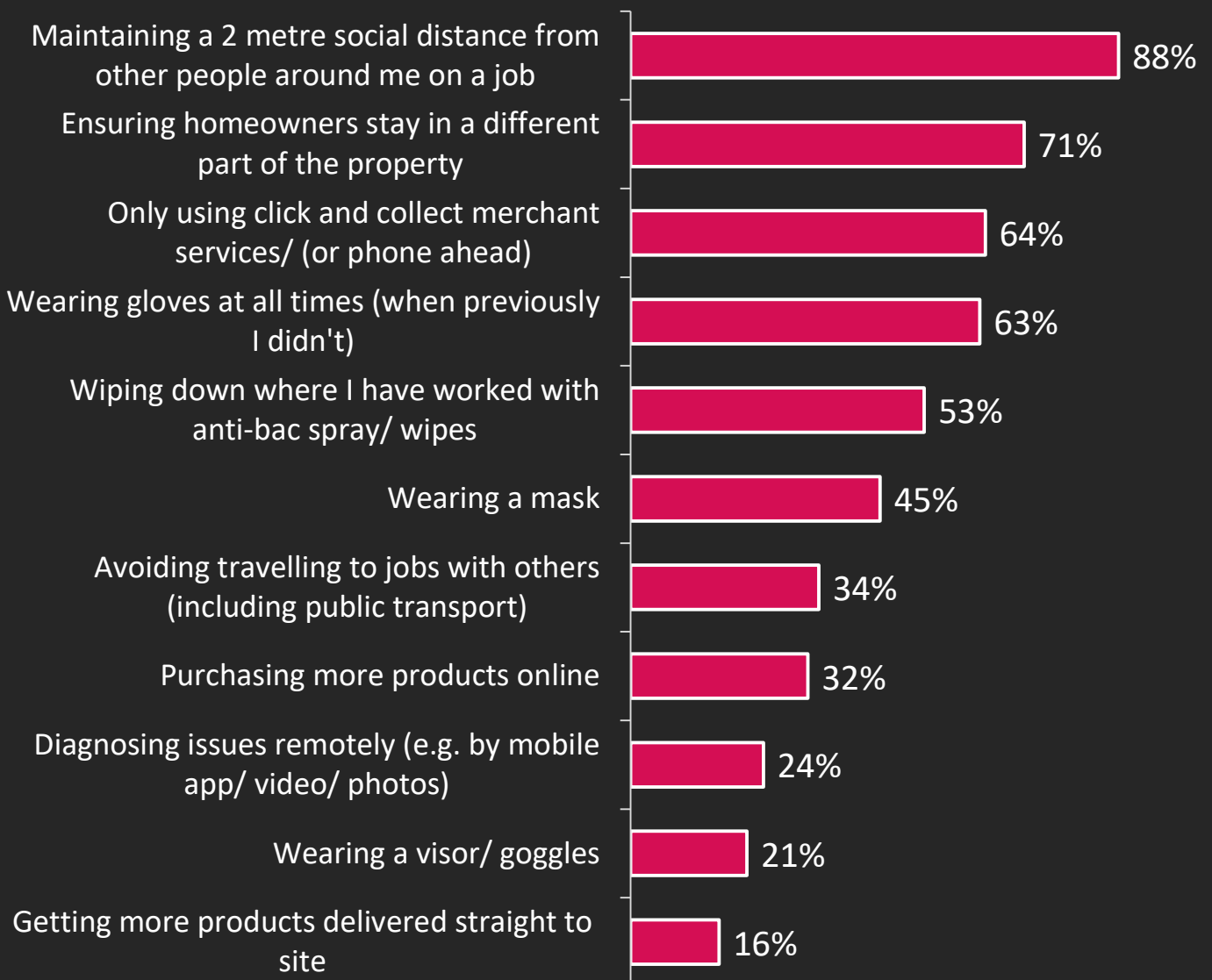
Q11. In terms of your own exposure to Coronavirus, which of these apply to you? (As far as you are aware) Base: 854, Larger business (170)

Q12. Which of the following work situations have you experienced during this pandemic? Base: 812



Workplace adaption

Of those c.16% of businesses still working, there has been a rapid change in working practices, in line with Govt guidelines. Installers on their own 'frontline' also need protective & hygiene products that support best practices on the job

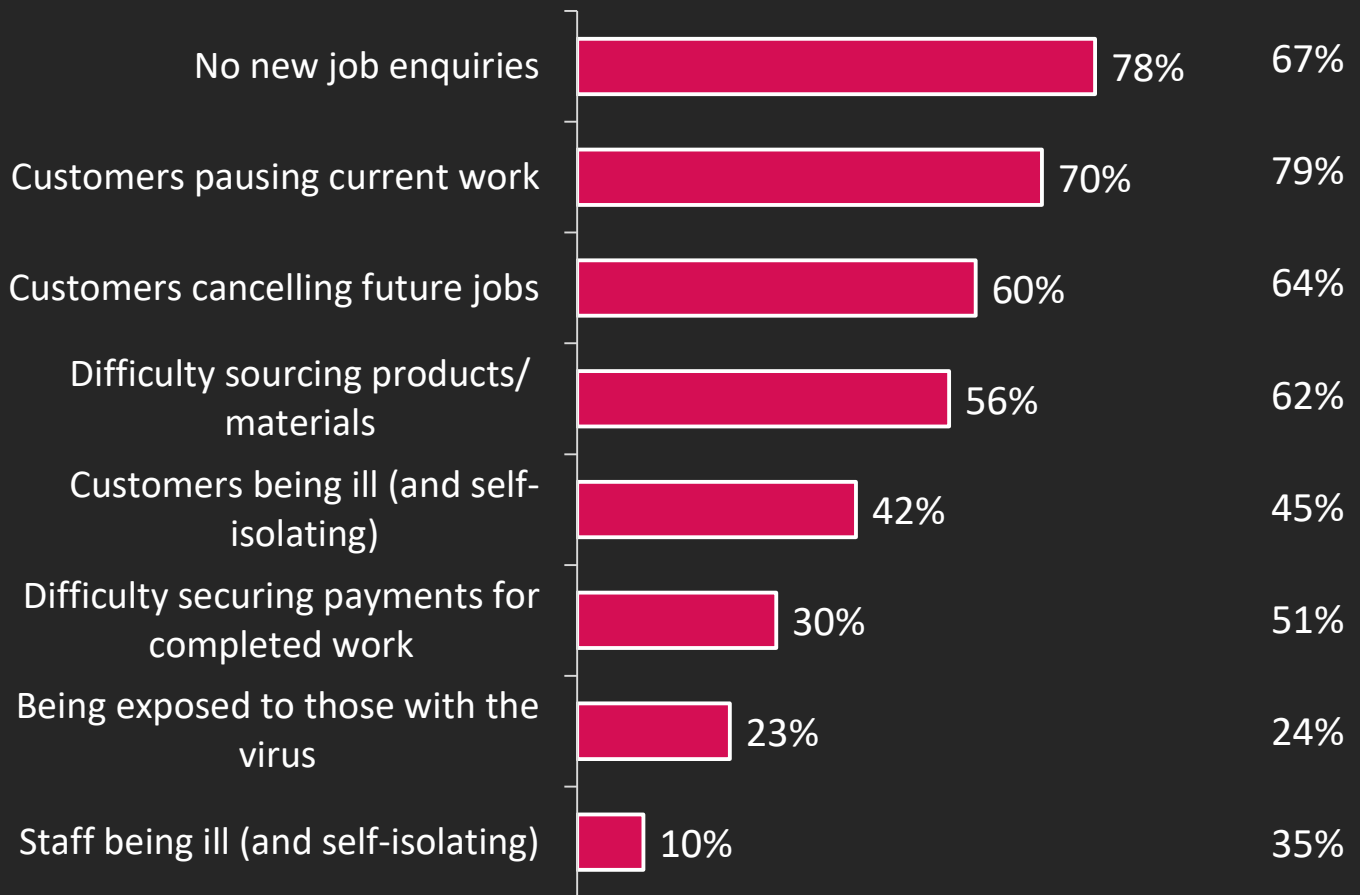




Real life challenges



Larger firms



Aside from lack of enquiries and work, business owners also have significant concerns about the supply chain, exposure to the virus and delays in payments (and associated cash flow difficulties)

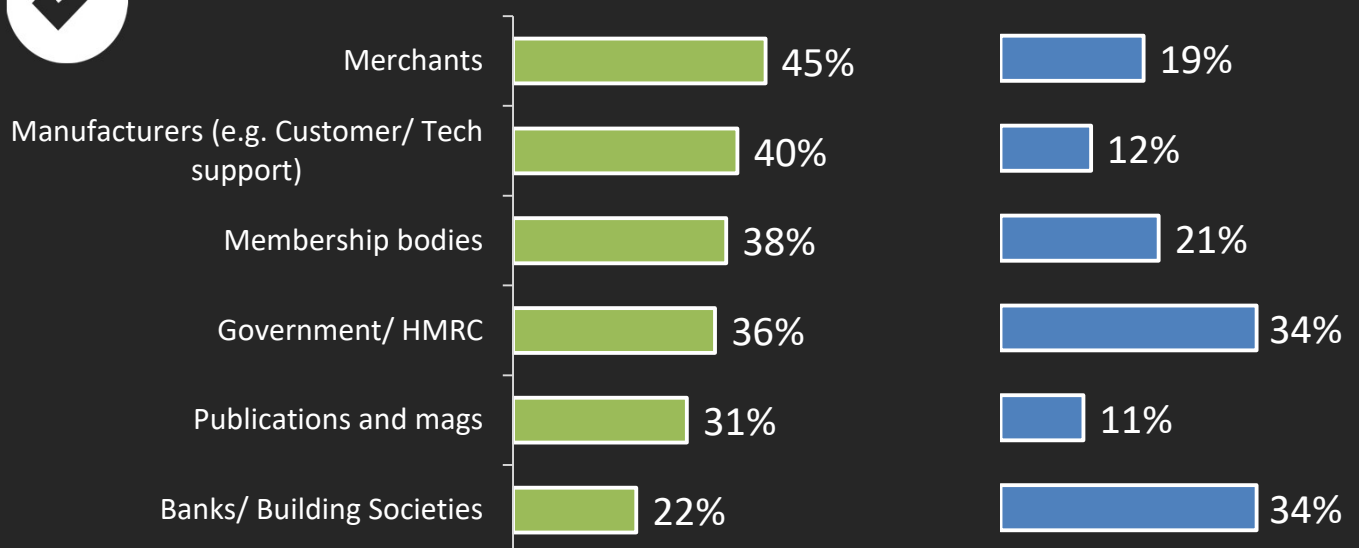
Being informed

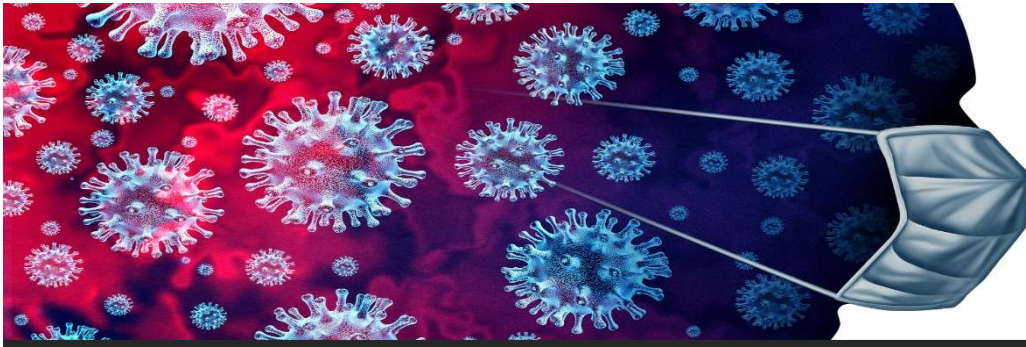
Sources used for COVID-19 info



Very good/ good support

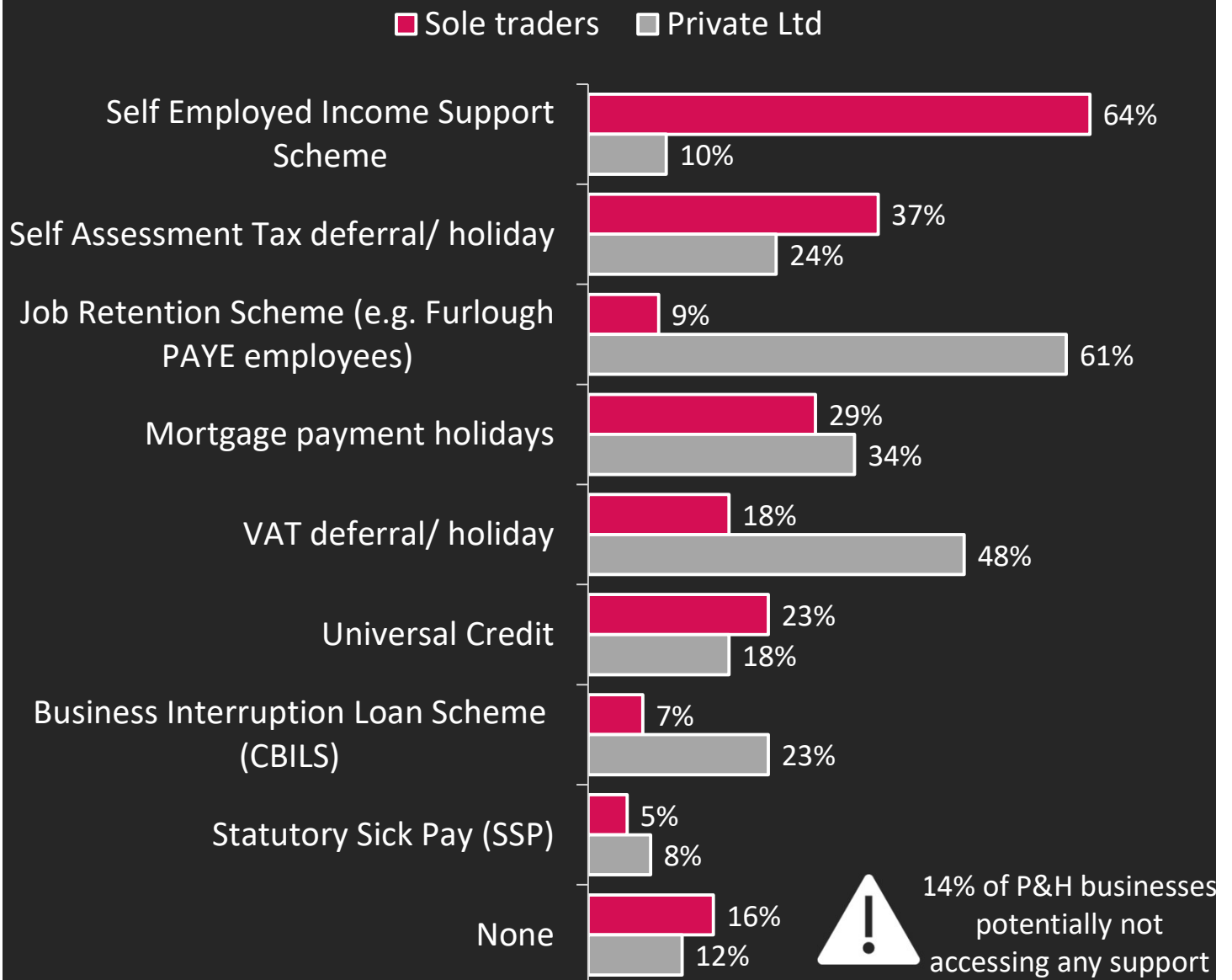
Very poor/ poor support

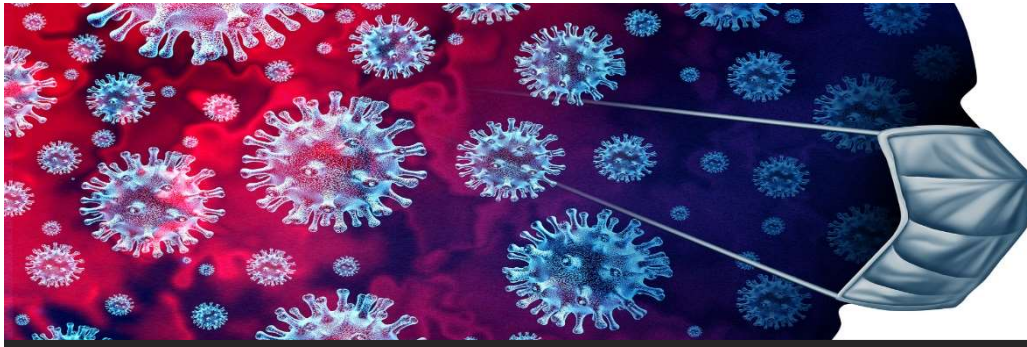




Financial aid

Payment holidays – for instance VAT and personal tax deferrals – as well as personal mortgages also appear to be high on the radar of the small business owners in this sector

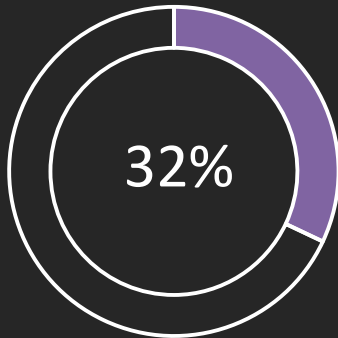




Financial aid

Intend to use

Furlough scheme (CJRS)



31,500 businesses
(mainly Ltd)

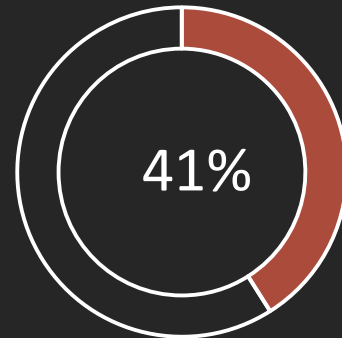


14%

'Unsupported gap'

14,000 businesses

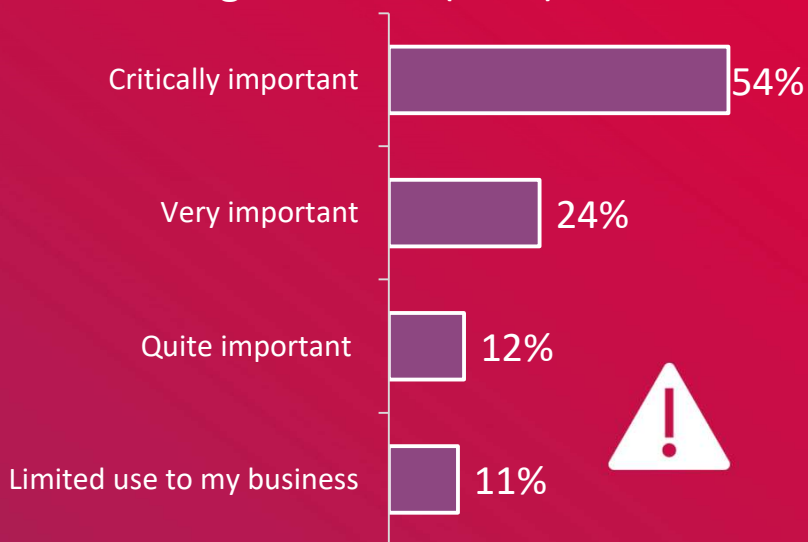
Self Emp. Income Support Scheme



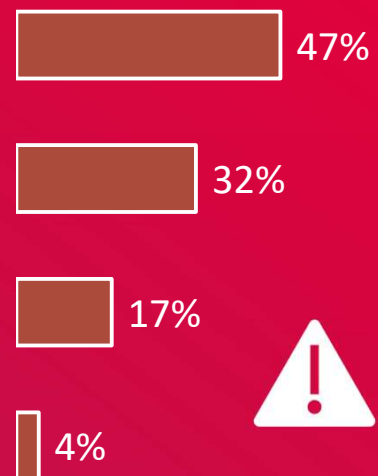
40,000 (mainly sole traders)

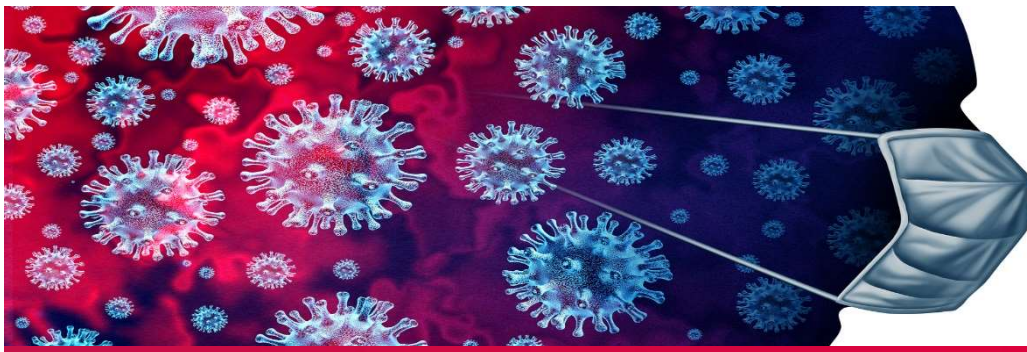
Remainder; using other support e.g. loans or continue to work

Furlough scheme (CJRS) is...



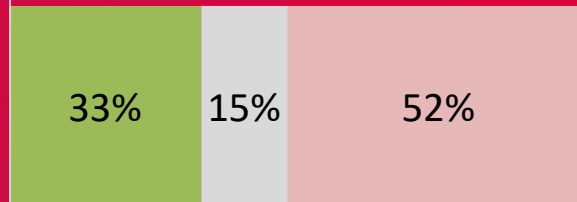
Self Emp Support Scheme is...



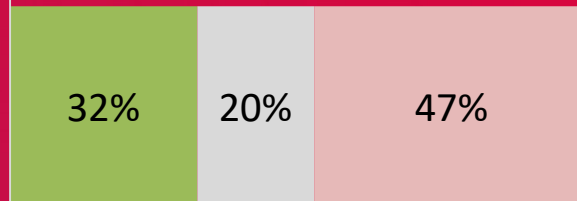


Financial aid

The range of financial measures announced so far are sufficient to support my business



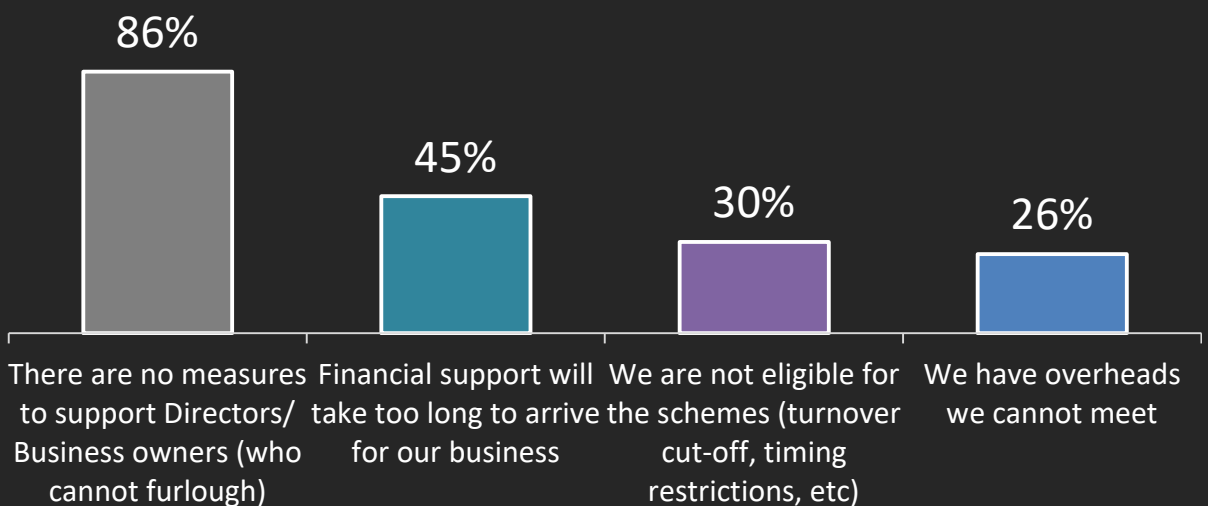
The range of financial measures announced so far are sufficient to support me personally



Low level agreement across both measures indicates significant unmet demand for financial support (particularly LTDs)

■ Agree ■ Neutral ■ Disagree

Those who feel unsupported



Equates to 18,700 P&H companies/directors who do not feel they have support forthcoming (19% of total)

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Q21. As a business owner/ director, to what extent do you agree or disagree that ... Base: 1045 / Q22. And, to what extent do you agree or disagree that ... Base: 446 / Q23. Why do you disagree that 'the range of financial measures announced so far are sufficient to support my business'? Base: 230)



Time during lock-down

77% complete
DIY projects at
home



71% support
family



65% stocktake,
sort out van &
storage



Other activities being planned

Updating technical plumbing and heating
skills (e.g. online courses)



Finding better value services (e.g.
insurances, subscriptions, advertising)



Marketing/ Promotion for the business
(e.g. new website, social media)



Volunteering in my community/ NHS



Getting another type of temporary job (to
make ends meet)



Complimentary / broader business training
(e.g. financial, marketing)



Although most business owners seem to be thinking 'short term', nearly **1 in 4** are already interested in using time to update technical knowledge (slightly less for other marketing or related training).

As lockdown continues, how will the appetite of business owners for self improvement develop?



Exit strategies



49%

might consider work for existing customers



38%

quote for jobs remotely (no visit required)



32%

diagnose more issues remotely (video, photo or app)



21%

stay on total lockdown (until lifted)

Industry support needed

"With the mortgage and loan breaks, all my business needs is support/training to ensure customers new and old know we are still here"

"Quicker support and not waiting until the beginning of June at earliest for support payment"

"With the mortgage and loan breaks, all my business needs is support/training to ensure customers new and old know we are still here"

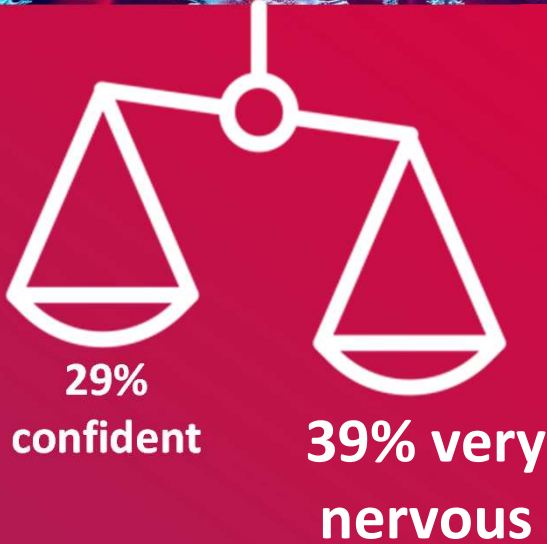
"We will need extra help coming out of the lock down to start to pay off suspended debts ie suppliers"

"I'm not eligible for the government help as I have earn't just over £50,000 ... We have very little in savings and will probably have to borrow money if possible to get enough to survive. I think the government should have done a sliding scale on the amount they offered self employed"

"As the gas and plumbing industry is classed as essential work, I think we should be in line for testing to enable us to make the decision to get back to work and allow us to reassure our clients that it is safe to have us working in their properties"



Business confidence



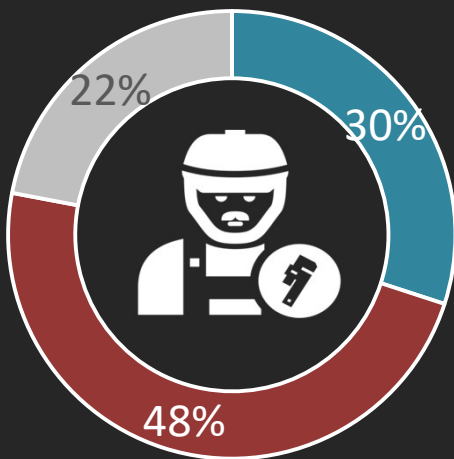
Confidence in your business position in 6-12 months time



38,500 business owners are very nervous about the future viability of their **Plumbing & Heating business**



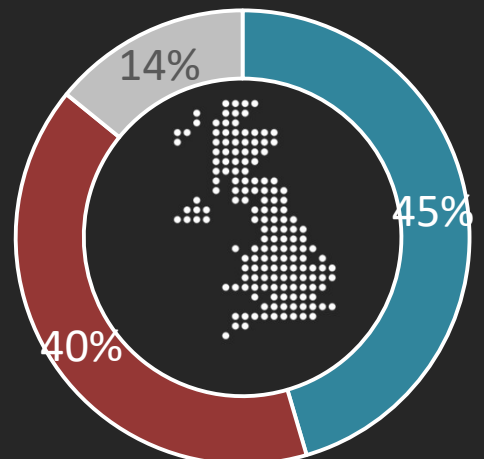
Smaller businesses most nervous



■ Even though the Coronavirus outbreak will be tough, Britain will be stronger when it gets through

■ The Coronavirus outbreak will be so tough that Britain will be weaker because of it for years to come

■ Unsure



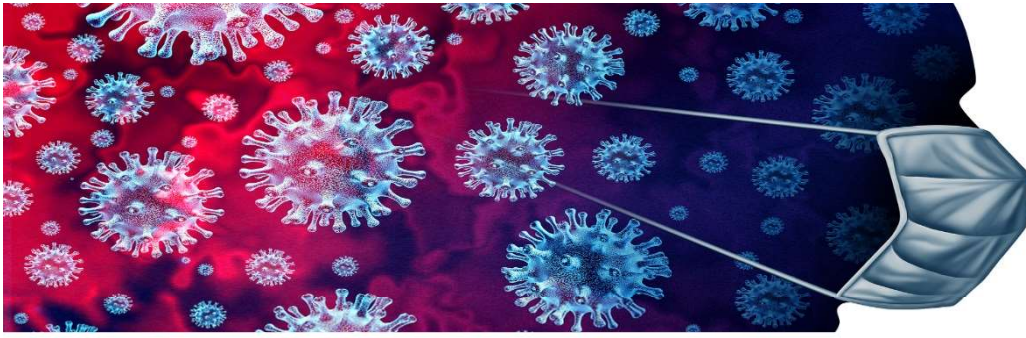
Source: IPSOS MORI

P&H business owners are more pessimistic about the long term impact of the Coronavirus crisis on the country when compared with the general public

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ILLUMINATING RESEARCH Q26. Thinking about the future of your business, how confident or nervous are you regarding its position in 6 to 12 months time? Use the scale of 1 to 10, where 1 is very confident and 10 is very nervous. Base: 1026

Q27. Thinking about The Coronavirus outbreak, which of these statements comes closest to your view? Base: 1026



Method

Qualitative stage



See 'Eureka Research Ltd'
on YouTube

An online focus group was convened on 31 March 2020 for 75 minutes to discuss the topic and better understand the impact of lockdown on installers

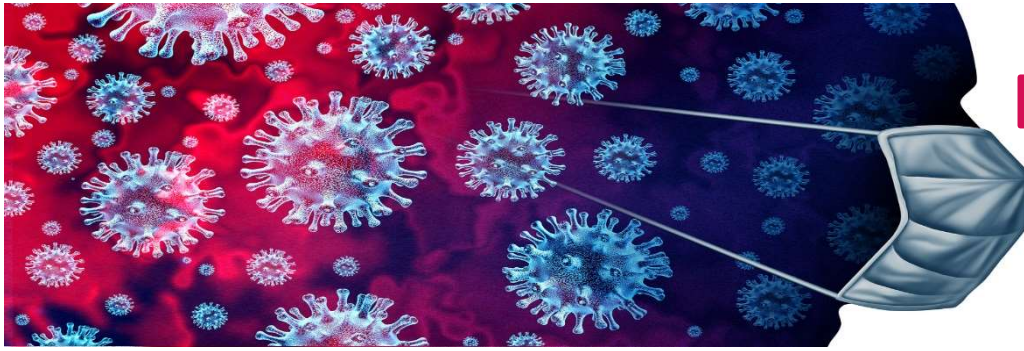
This stage allowed us to further refine our draft questionnaire and pilot test some of our underlying assumptions



Quantitative stage

Interviewing was undertaken via an online survey platform, developed and hosted by Eureka! Research. Fieldwork was open between 3rd April – 16th April 2020 and was kindly promoted by partners listed on page 2. We thank them sincerely for their support

The final number of interviews completed was 1,115. A copy of the questionnaire is available by request
Enquires: hello@eurekaresearch.co.uk



Data tables

Q1. Which of these best describes you?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Owner of a Sole Trader business (Sole Proprietorship)	57%	100%	-	83%	68%	42%	15%
Owner/ Director of a Private Limited Company (Ltd)	43%	-	100%	17%	32%	59%	85%

Q2. Where do you normally undertake plumbing and heating work...

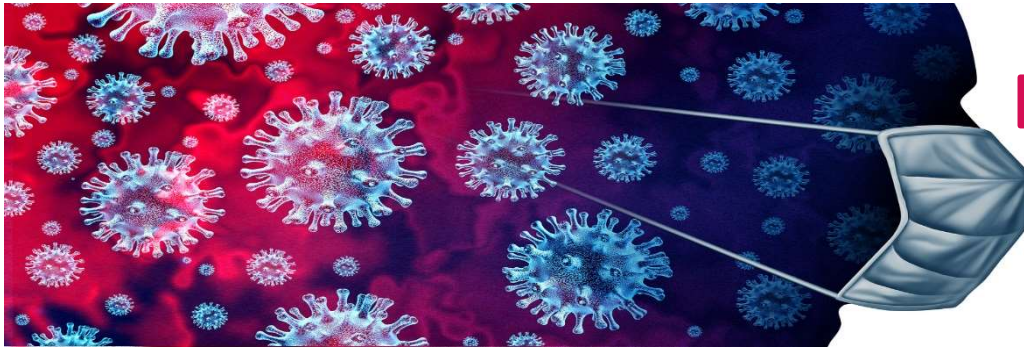
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Residential properties	90%	94%	85%	96%	94%	94%	71%
New build estates/ sites	14%	12%	18%	13%	8%	17%	24%
Commercial sites (e.g. offices, factories)	16%	11%	22%	11%	9%	22%	29%
Public sector buildings (e.g. NHS, schools)	8%	5%	11%	4%	4%	9%	18%
All of these	7%	4%	10%	2%	5%	5%	16%

Q3. Which of these best describes your main business focus?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Plumbing and Heating - heating, bathroom installs and general plumbing	59%	63%	55%	57%	65%	62%	53%
Heating - specialising in installations/ servicing	52%	48%	57%	46%	50%	49%	64%
General Plumbing - focusing on smaller jobs and repairs	22%	24%	19%	29%	24%	15%	16%
Bathroom installations - domestic bathroom focus	11%	10%	12%	12%	10%	11%	10%
Other focus (please tell us below)	6%	4%	9%	6%	4%	6%	13%

Q4. What impact has Coronavirus had on your normal workload? Please use the scale of 1 to 10, where 1 is no impact and 10 is severe impact.

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
1 - No impact (we are working as normal)	1%	1%	1%	1%	1%	2%	1%
2	1%	0%	1%	0%	-	-	3%
3	1%	1%	1%	1%	1%	2%	2%
4	1%	1%	1%	2%	1%	2%	1%
5	4%	4%	4%	2%	4%	4%	6%
6	1%	1%	1%	2%	1%	3%	1%
7	7%	7%	7%	6%	9%	6%	6%
8	15%	13%	18%	11%	14%	13%	21%
9	21%	20%	22%	16%	21%	25%	22%
10 - Severe impact (we have no work)	48%	51%	44%	59%	49%	45%	36%
Median	9	10	9	10	9	9	9
Mean	8.74	8.81	8.65	8.97	8.86	8.63	8.34



Data tables

Q5. What adaptations are you making to your working practices, if any?

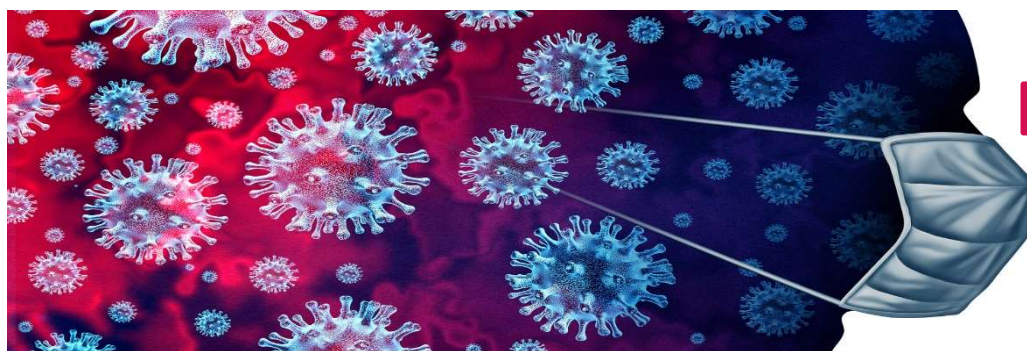
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	180	100	80	35	50	36	34
Maintaining a 2 metre social distance from other people around me on a job	88%	90%	86%	86%	82%	97%	91%
Ensuring homeowners stay in a different part of the property	71%	73%	69%	63%	72%	81%	68%
Only using click and collect merchant services/ (or phone ahead)	64%	61%	69%	57%	58%	72%	71%
Wearing gloves at all times (when previously I didn't)	63%	52%	76%	46%	58%	75%	79%
Wiping down where I have worked with anti-bac spray/ wipes	53%	51%	55%	43%	46%	61%	71%
Wearing a mask	45%	42%	49%	43%	36%	50%	56%
Avoiding travelling to jobs with others (including public transport)	34%	32%	36%	37%	30%	22%	47%
Purchasing more products online	32%	39%	23%	29%	36%	25%	26%
Diagnosing issues remotely (e.g. by mobile app/ video/ photos)	24%	22%	28%	20%	24%	25%	38%
Wearing a visor/ goggles	21%	21%	20%	11%	20%	25%	21%
Getting more products delivered straight to site	16%	19%	13%	14%	22%	11%	9%
Other (please tell us below)	6%	4%	8%	6%	6%	3%	6%
None of these	1%	1%	-	-	2%	-	-

Q6. Are you still providing an 'emergency service'?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Yes - to all customers	43%	42%	45%	40%	42%	46%	49%
Yes - only to customers I have worked with before	34%	34%	34%	28%	36%	38%	36%
Yes - only to key workers/ vulnerable groups only	11%	12%	11%	14%	10%	8%	13%
No	17%	18%	16%	25%	19%	14%	9%

Q7. What sort of 'emergency' work are you undertaking?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	918	517	401	193	252	173	153
Boiler/ heating repairs	88%	88%	90%	82%	90%	92%	90%
Fixing leaks/ burst pipes	76%	78%	72%	75%	79%	75%	75%
Quick and easy repairs	39%	41%	36%	40%	42%	36%	35%
Toilets	37%	41%	33%	39%	39%	32%	33%
Blocked drains/ drainage	22%	21%	22%	20%	21%	19%	23%
Correct homeowner mistakes/ poor installations	17%	18%	16%	17%	21%	18%	12%
Other emergency work (please tell us below)	9%	7%	11%	6%	6%	6%	16%



Data tables

Q8. Other than everyone's health and welfare, what are the THREE biggest concerns facing your business today? (Please tick up to 3)

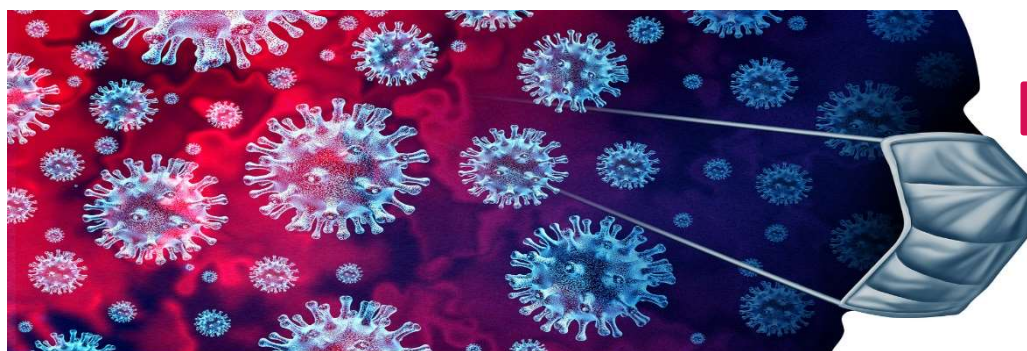
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1110	632	478	255	312	200	170
Cashflow	57%	56%	59%	56%	55%	59%	67%
Paying myself	51%	52%	50%	52%	59%	54%	30%
Getting hold of materials/ merchants being open	38%	41%	35%	36%	45%	34%	35%
Going out of business	37%	34%	42%	34%	32%	41%	44%
Paying off debts/ loans	31%	35%	26%	37%	36%	24%	21%
Letting my customers down	31%	32%	28%	34%	32%	30%	24%
The longer term viability of the Plumbing & Heating sector	16%	16%	16%	15%	14%	21%	11%
Paying staff	15%	7%	27%	2%	7%	18%	49%
None of these	2%	2%	1%	2%	1%	2%	1%

Q9 .Which of these business decisions have you ... (a) already taken/ done

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Not asked	-	-	-	-	-	-	-
No reply	11%	14%	8%	17%	12%	7%	2%
Cancelled work	75%	76%	73%	70%	79%	80%	71%
Furloughed/ laid off (2,3,4)	41%	23%	65%	14%	29%	59%	86%
cancelled product purchases	34%	36%	31%	35%	36%	38%	30%
Furloughed staff	33%	14%	58%	12%	21%	46%	76%
Cancelled subs/ ads (6,7)	24%	23%	26%	24%	25%	22%	26%
Cancelled advertising	21%	20%	22%	20%	23%	18%	22%
Stopped recruitment	17%	10%	28%	10%	12%	20%	40%
Temporarily Laid off casual staff	15%	13%	17%	10%	11%	21%	22%
Cancelled subscriptions	10%	9%	11%	10%	8%	9%	12%
stopped leases	6%	4%	8%	5%	4%	8%	8%
Permanently Laid off casual staff	4%	3%	4%	5%	3%	2%	4%
Sold equipment	2%	3%	2%	2%	3%	2%	2%

Q9 .Which of these business decisions have you ... or (b) considering taking?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Not asked	-	-	-	-	-	-	-
No reply	69%	73%	63%	72%	67%	71%	57%
Cancelled subscriptions	13%	11%	16%	11%	15%	13%	16%
Cancelled advertising	10%	8%	13%	10%	8%	12%	15%
stopped leases	9%	7%	12%	8%	11%	9%	11%
Sold equipment	8%	7%	9%	9%	9%	7%	9%
Cancelled product purchases	7%	6%	9%	7%	6%	6%	11%
Furloughed staff	6%	3%	11%	3%	7%	6%	10%
Cancelled work	5%	6%	5%	6%	5%	5%	5%
Permanently Laid off casual staff	5%	2%	9%	1%	4%	6%	15%
Temporarily Laid off casual staff	3%	2%	4%	1%	3%	4%	6%
Stopped recruitment	2%	1%	3%	1%	0%	1%	6%



Data tables

Q10. Which of these have you already experienced as a direct result of Coronavirus?

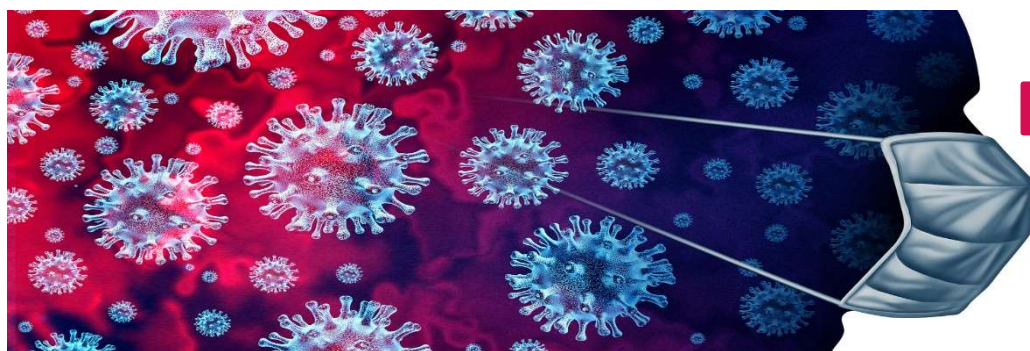
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
No new job enquiries	78%	80%	76%	79%	83%	84%	67%
Customers pausing current work	70%	68%	72%	65%	73%	70%	79%
Customers cancelling future jobs	60%	58%	62%	53%	65%	63%	64%
Difficulty sourcing products/ materials	56%	56%	56%	53%	57%	57%	62%
Customers being ill (and self-isolating)	42%	40%	45%	39%	42%	46%	45%
Difficulty securing payments for completed work	30%	26%	35%	21%	25%	33%	51%
Being exposed to those with the virus	23%	23%	24%	21%	22%	27%	24%
Staff being ill (and self-isolating)	10%	4%	19%	4%	4%	7%	35%
Other (please tell us below)	3%	3%	4%	4%	2%	4%	4%
None of these	2%	1%	2%	3%	1%	2%	1%

Q11. In terms of your own exposure to Coronavirus, which of these apply to you? (As far as you are aware)

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
I have had/ I have Coronavirus symptoms	8%	7%	9%	6%	9%	9%	7%
A family member or friend has/ had Coronavirus symptoms	17%	17%	16%	14%	20%	18%	16%
A member of staff has/ had Coronavirus symptoms	4%	1%	7%	1%	1%	2%	15%
A customer I have seen recently has/ had Coronavirus symptoms	10%	10%	10%	8%	11%	13%	11%
A fellow tradesperson I have seen recently has/ had Coronavirus symptoms	6%	7%	4%	4%	6%	6%	5%
None of these	69%	71%	66%	75%	67%	66%	61%

Q12. Which of the following work situations have you experienced during this pandemic?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	812	449	363	183	210	138	135
Site manager instructing me to work against my better judgement	4%	4%	4%	3%	3%	3%	7%
Being sent to collect equipment/ supplies when I would rather not	6%	7%	6%	5%	7%	7%	2%
Having to work in closer proximity to colleagues than I would prefer	19%	18%	21%	18%	16%	22%	22%
Travelling together with others in close confines (including public transport)	6%	4%	8%	4%	3%	8%	9%
Other (please tell us about any other similar issues below)	4%	3%	6%	4%	2%	7%	5%
None of these	73%	76%	69%	74%	78%	68%	70%



Data tables

Q13. Which of the following are you doing now, or planning to, at this time of uncertainty?

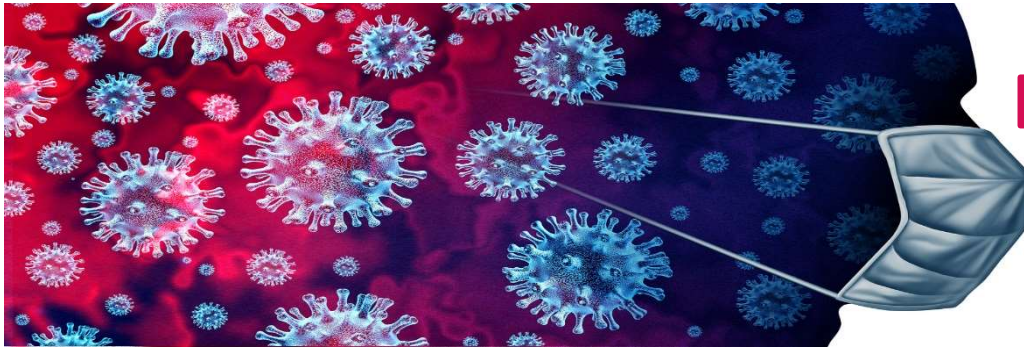
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Completing DIY projects at home	77%	81%	71%	75%	86%	80%	59%
Supporting my family/ helping out at home	71%	72%	69%	70%	73%	76%	60%
Stocktaking, sorting out vans and storage	65%	64%	66%	56%	72%	74%	58%
Updating technical plumbing and heating skills (e.g. online courses)	23%	22%	25%	23%	25%	25%	20%
Finding better value services (e.g. insurances, subscriptions, advertising)	20%	18%	23%	14%	22%	23%	24%
Marketing/ Promotion for the business (e.g. new website, social media)	15%	11%	21%	9%	14%	22%	22%
Volunteering in my community/ NHS	14%	15%	11%	13%	14%	14%	10%
Getting another type of temporary job (to make ends meet)	11%	11%	11%	15%	10%	13%	4%
Complimentary / broader business training (e.g. financial, marketing)	8%	4%	12%	5%	7%	7%	12%
Leaving the industry (retraining in another career/ job)	6%	6%	6%	9%	4%	7%	5%
None of these	4%	3%	5%	3%	3%	2%	11%
Other (please tell us below)	4%	3%	4%	4%	3%	4%	4%

Q14. Which sources are you relying on to keep up-to-date with the pandemic and how it affects your business?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1108	632	476	255	312	199	170
Mainstream news (e.g. TV, Radio)	72%	73%	72%	74%	76%	69%	72%
Government resources (e.g. website, social)	64%	59%	70%	56%	63%	62%	82%
Professional/ Trade bodies (e.g. CIPHE, APHC, Gas Safe, etc)	53%	53%	53%	47%	55%	54%	56%
Social media (e.g. Twitter, Instagram, Facebook Trade Groups, etc)	38%	37%	39%	33%	37%	39%	44%
Trade magazines or websites (e.g. Installer, PHAM)	31%	33%	29%	30%	35%	33%	30%
Other tradespeople in your personal network	21%	21%	21%	22%	21%	23%	22%
Merchants	20%	20%	21%	20%	18%	25%	25%
Manufacturers/ Brands supplying goods	18%	17%	20%	15%	20%	19%	26%
Other (please tell us below)	2%	1%	3%	2%	1%	3%	3%

Q15. Which of these are you a member of/ registered/ affiliated with?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1115	636	479	257	313	200	170
Gas Safe Register	86%	85%	88%	76%	91%	92%	89%
CIPHE	30%	28%	33%	26%	33%	30%	33%
OFTEC	16%	10%	23%	5%	10%	21%	37%
Federation of Small Businesses (FSB)	7%	6%	9%	4%	6%	10%	15%
APHC	6%	4%	8%	3%	3%	7%	14%
None of these	3%	4%	3%	7%	3%	1%	4%
SNIPeF	1%	1%	3%	1%	2%	1%	4%
British Chambers of Commerce (BCC)	1%	1%	2%	0%	1%	2%	3%
HHIC	1%	0%	1%	0%	1%	1%	1%



Data tables

Q16. How would you rate the level of support you have received so far from the following (in relation to Coronavirus) ...

	Excellent	Good	Average	Poor	Very Poor	Not applicable/ Unsure
UK Government/ HMRC	18%	17%	13%	23%	29%	10%
Merchants (e.g. getting materials)	28%	19%	17%	17%	11%	9%
Banks/ Building Societies	10%	11%	15%	24%	28%	21%
Membership bodies (i.e. plumbing and heating)	18%	18%	17%	15%	16%	15%
Publications and magazines	7%	17%	21%	10%	7%	25%
Manufacturers in the plumbing and heating sector (e.g. Customer/ Tech support)	19%	18%	18%	11%	8%	20%

Q18. Which of the following are you using, or thinking about using, in the near future, if any?

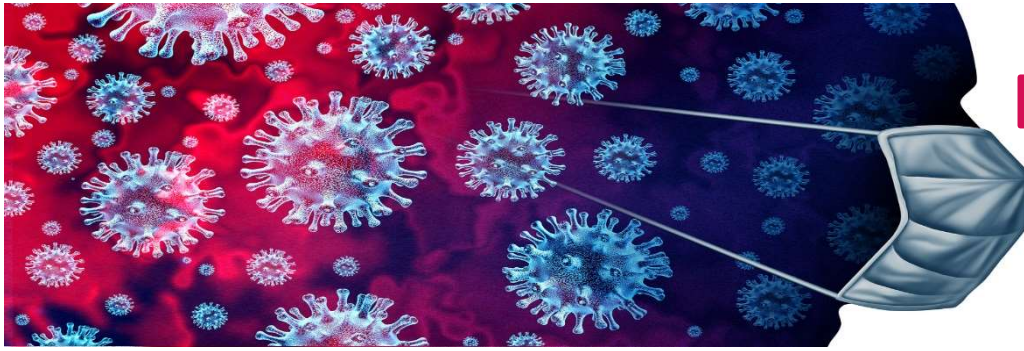
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1056	605	451	257	313	200	170
Self Employed Income Support Scheme	41%	64%	10%	58%	53%	29%	11%
Self Assessment Tax deferral/ holiday	32%	37%	24%	28%	38%	37%	24%
Job Retention Scheme (e.g. Furlough PAYE employees)	32%	9%	61%	10%	20%	44%	79%
Mortgage payment holidays	31%	29%	34%	25%	37%	32%	31%
VAT deferral/ holiday	31%	18%	48%	3%	21%	58%	66%
Universal Credit	21%	23%	18%	25%	25%	21%	5%
Business Interruption Loan Scheme (CBILS)	14%	7%	23%	9%	10%	17%	32%
Statutory Sick Pay (SSP)	6%	5%	8%	6%	5%	4%	13%
Other support (please tell us below)	4%	4%	3%	5%	3%	4%	2%
None of these	14%	16%	12%	20%	11%	15%	8%

Q19. How important to the survival of your business is the Job Retention Scheme (e.g. Furlough PAYE employees)?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	276	-	276	17	51	70	121
Critically important	54%	-	54%	29%	43%	47%	67%
Very important	24%	-	24%	35%	31%	23%	18%
Quite important	12%	-	12%	12%	8%	19%	11%
Not that important	7%	-	7%	12%	12%	7%	3%
No use to me or my business	3%	-	3%	12%	2%	3%	1%
Not applicable to my business type/ setup	1%	-	1%	-	4%	1%	-

Q20. How important to the survival of your business is the Self Employed Income Support Scheme?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	382	382	-	137	145	51	12
Critically important	47%	47%	-	47%	45%	51%	75%
Very important	32%	32%	-	28%	37%	29%	-
Quite important	17%	17%	-	19%	16%	18%	25%
Not that important	3%	3%	-	4%	3%	-	-
No use to me or my business	0%	0%	-	-	-	2%	-
Not applicable to my business type/ setup	1%	1%	-	1%	-	-	-



Data tables

Q21. As a business owner/ director, to what extent do you agree or disagree that ... 'The range of financial measures announced so far are sufficient to support me personally'

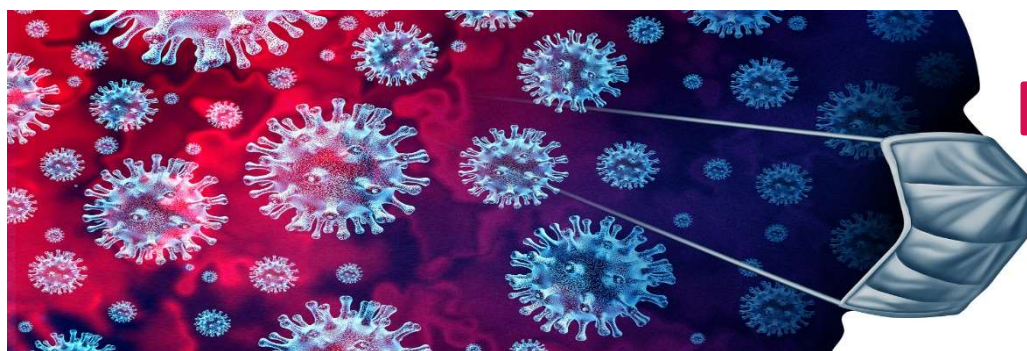
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1045	597	448	256	309	200	170
Strongly agree	11%	11%	11%	11%	10%	12%	15%
Slightly agree	21%	26%	14%	21%	25%	16%	21%
Neither agree nor disagree	20%	25%	14%	24%	24%	18%	13%
Slightly disagree	12%	12%	13%	15%	10%	13%	14%
Strongly disagree	35%	25%	48%	29%	31%	42%	37%

Q22. And, to what extent do you agree or disagree that ... 'The range of financial measures announced so far are sufficient to support my business'

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	446	-	446	44	99	116	145
Strongly agree	11%	-	11%	9%	3%	13%	17%
Slightly agree	22%	-	22%	14%	19%	14%	35%
Neither agree nor disagree	15%	-	15%	27%	16%	13%	11%
Slightly disagree	11%	-	11%	9%	14%	14%	8%
Strongly disagree	41%	-	41%	41%	47%	47%	29%

Q23. Why do you disagree that 'the range of financial measures announced so far are sufficient to support my business'?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	230	-	230	22	61	70	54
There are no measures to support Directors/ Business owners (who cannot furlough)	86%	-	86%	73%	89%	96%	78%
Financial support will take too long to arrive for our business	45%	-	45%	45%	56%	37%	52%
We are not eligible for the schemes (turnover cut-off, timing restrictions, etc)	30%	-	30%	27%	31%	30%	24%
We have overheads we cannot meet	26%	-	26%	23%	28%	21%	41%
It's too complicated to arrange/ apply	18%	-	18%	23%	20%	16%	17%
Other (please tell us below)	5%	-	5%	5%	2%	3%	11%



Data tables

Q25. As the lockdown continues into future months, which of the following might you consider?

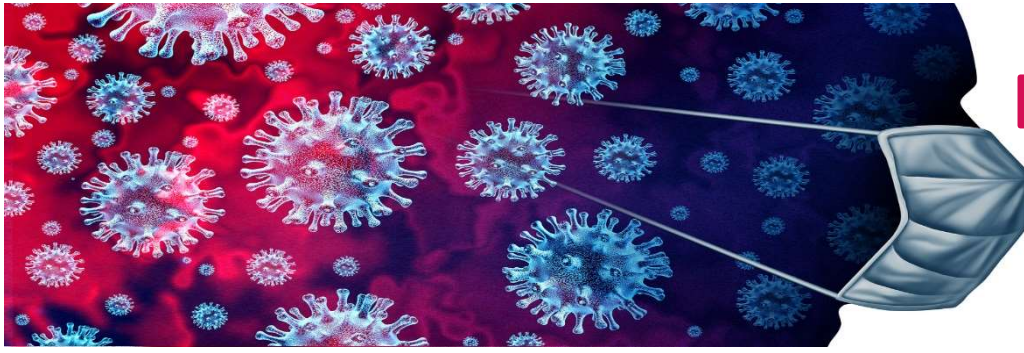
		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1034	593	441	257	313	200	170
Only accepting jobs from customers I already know	49%	53%	42%	49%	51%	54%	36%
Quoting for work remotely, but not undertaking it until safe to do so	38%	37%	39%	32%	42%	37%	45%
Diagnosing more issues remotely (e.g. by video or photo or mobile app)	32%	30%	34%	23%	37%	37%	31%
Only using products that have been delivered straight to site	10%	9%	12%	8%	11%	8%	16%
Only accepting jobs from households that have already had Coronavirus	10%	11%	9%	11%	12%	9%	9%
Avoiding visiting homes altogether - focusing only on commercial projects	9%	8%	10%	10%	5%	6%	18%
Other (please tell us other things you may consider below)	12%	11%	14%	10%	11%	13%	16%
None of these - I will stay on total lockdown (until lifted)	21%	21%	20%	28%	22%	16%	15%

Q26. Thinking about the future of your business, how confident or nervous are you regarding its position in 6 to 12 months time? Use the scale of 1 to 10, where 1 is very confident and 10 is very nervous.

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1026	591	435	257	313	200	170
1 - Very confident about the future of my business	7%	7%	7%	7%	5%	10%	8%
2	4%	5%	4%	4%	6%	4%	5%
3	8%	8%	8%	8%	5%	8%	12%
4	6%	6%	6%	5%	7%	7%	6%
5	17%	18%	15%	18%	17%	17%	15%
6	8%	8%	9%	8%	9%	7%	9%
7	10%	10%	9%	9%	11%	8%	10%
8	13%	13%	14%	16%	14%	13%	13%
9	6%	5%	7%	7%	4%	7%	6%
10 - Very nervous about the future of my business	20%	20%	20%	19%	22%	20%	16%
Median	6	6	7	7	7	6	6
Mean	6.28	6.21	6.37	6.39	6.43	6.14	5.98

Q27. Thinking about The Coronavirus outbreak, which of these statements comes closest to your view?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1026	591	435	257	313	200	170
Even though the Coronavirus outbreak will be tough, Britain will be stronger when it gets through	30%	28%	33%	30%	26%	32%	36%
The Coronavirus outbreak will be so tough that Britain will be weaker because of it for years to come	48%	47%	49%	43%	49%	52%	49%
Unsure	22%	25%	19%	26%	25%	16%	14%



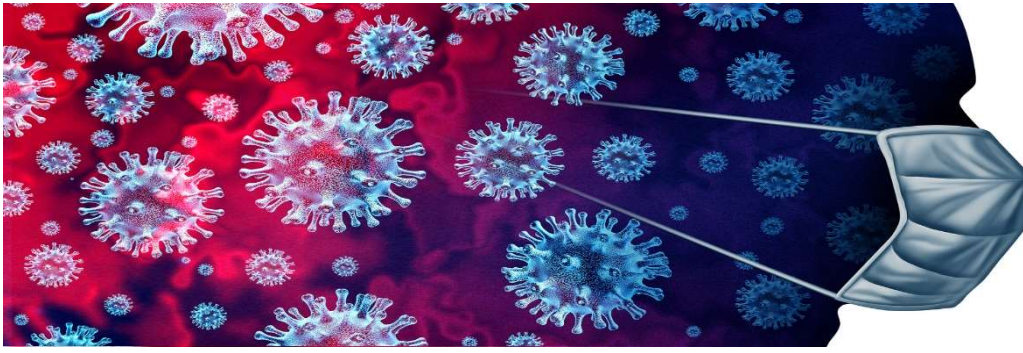
Data tables

Q30. How many employees / apprentices are in your company?

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	1011	582	429	257	313	198	170
None (It's just me)	56%	76%	28%	89%	68%	37%	2%
One employee	15%	13%	18%	7%	20%	25%	8%
Two employees	12%	7%	19%	4%	10%	26%	14%
Three employees	5%	1%	10%	-	2%	8%	16%
Four employees	2%	1%	4%	-	0%	2%	9%
Five employees	2%	0%	5%	-	0%	2%	9%
Six or more employees	7%	1%	17%	-	-	1%	42%

Q31. Have you personally completed any of these qualifications...

		Sole Trader	Private Ltd	Less than £50,000	£50,000 to £99,999	£100,000 to £199,999	£200,000 or more
	906	510	396	224	285	184	154
Level 2 Diploma (or equivalent)	13%	15%	10%	15%	14%	11%	9%
Level 2 NVQ (or equivalent)	30%	32%	28%	32%	29%	34%	24%
Level 3 Diploma (or equivalent)	14%	14%	15%	11%	13%	17%	15%
Level 3 NVQ (or equivalent)	43%	42%	44%	34%	45%	47%	48%
Other (please tell us below)	29%	30%	28%	32%	28%	29%	25%
I do not have any 'formal' Plumbing & Heating qualifications	12%	11%	13%	8%	13%	9%	17%



Technical notes

Note A

The most detailed measure of businesses in the UK is the Inter Departmental Business Register (IDBR). These official statistics go down to a detailed level (4 digit SIC code system) but only capture business registered for VAT or PAYE. The ONS state that three quarters of all UK private sector businesses are non-employers, and the majority of these are not registered for either VAT or PAYE. An alternative measure which also includes non registered businesses is also published by the Dept of Business, Energy and Industrial Strategy (BEIS) but does not go down to a micro sector level.

IDBR code 4322 : Plumbing; heat and air-conditioning installation: 37,360 enterprises

BIS SIC code 43 : Specialised construction activities: 583,310 businesses / 112,795 employers

IDBR code 43 : 210,430 enterprises (equates to 36% of BIS estimate) – this tallies approximately with the Eureka!

Bristan 2017 survey which found that 42% of respondents were VAT registered

Therefore, IDBR code 4322 : Plumbing; heat and air-conditioning installation: 37,360 enterprises, is actually 103,778 businesses total

Est. sub sector splits: 63% are plumbing, 32% are heating and 5% are ventilation, air conditioning and refrigeration (HVAC) only companies (assumptions based on SummitSkills 2018 estimates)

Therefore, grand total of 65,380 pure plumbing businesses in UK and a further 33,209 are heating related organisations with a strong plumbing focus also

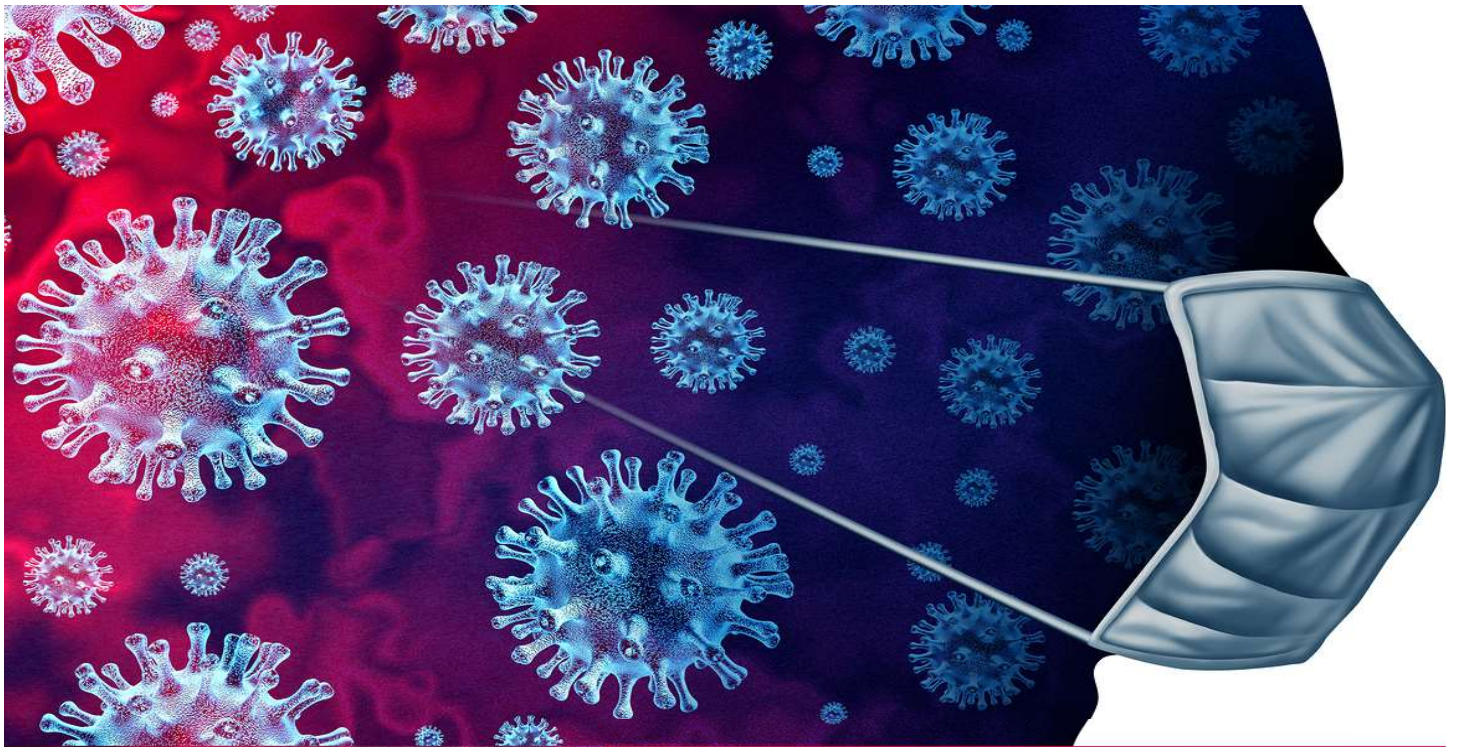
Please note that population estimates here do not include any workers in other SIC codes e.g. general builders (SIC 4120), some of which may also purchase plumbing related product in the course of their work. Above figures are dated as taken on 10 March 2018

The working assumption for 'number of working days' was 254



Richard & Dave (Directors and founders of **Eureka! Research**) and are one of the few market research agencies who focus on the UK plumbing and heating sector.

We've worked with sanitaryware brands, those focused on brassware, shower suppliers, plus heavyweight national merchants, providing us with an enviable knowledge base.



Whether its commercial or residential, architects, M&E's, plumbers, merchants or consumers we've recruited, moderated, interviewed, shopped and drawn valuable insight from all of them.

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