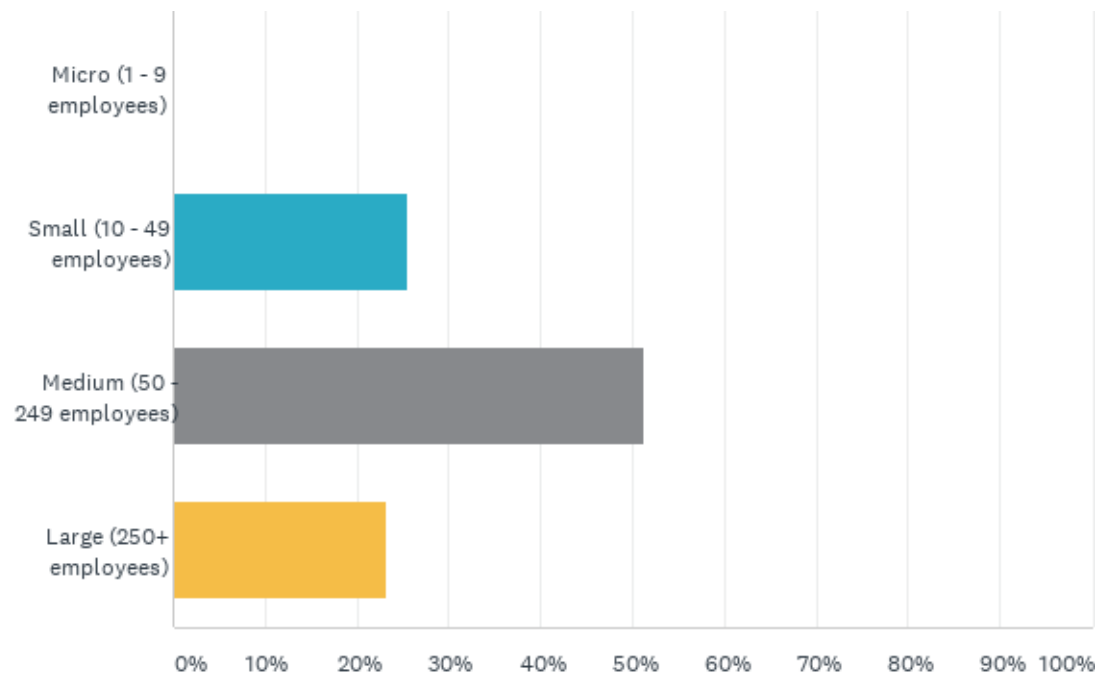


COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)





Q1. Business size

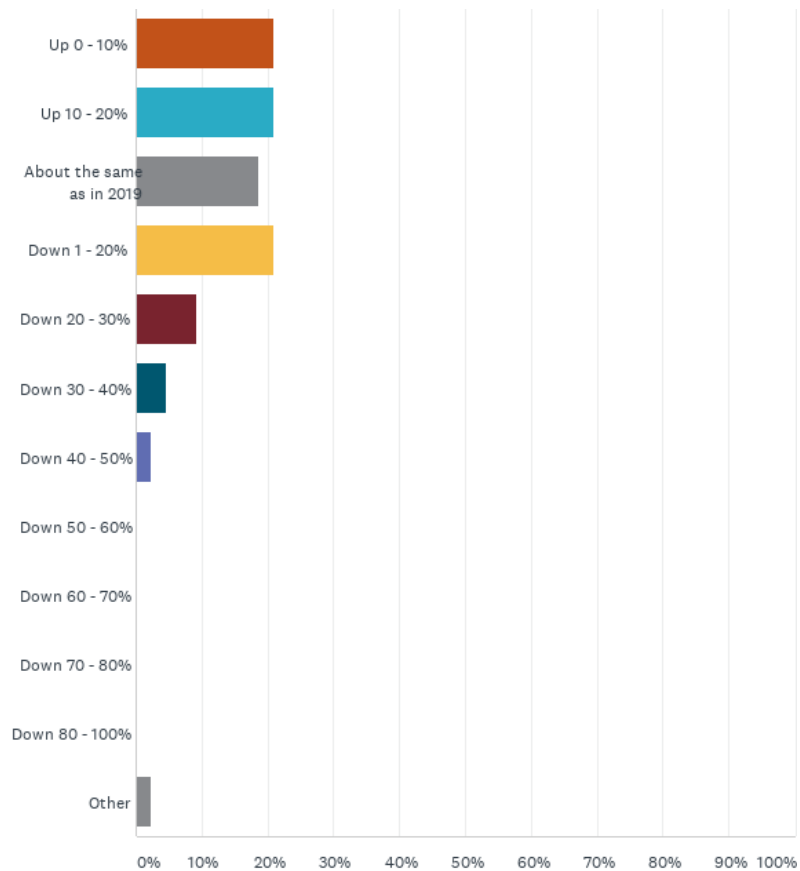


Answer Choices	Responses	Count
Micro (1 - 9 employees)	0.0%	0
Small (10 - 49 employees)	25.58%	11
Medium (50 - 249 employees)	51.16%	22
Large (250+ employees)	23.26%	10
TOTAL		43

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q2: To what extent has your turnover has been affected when comparing September 2020 to September 2019?

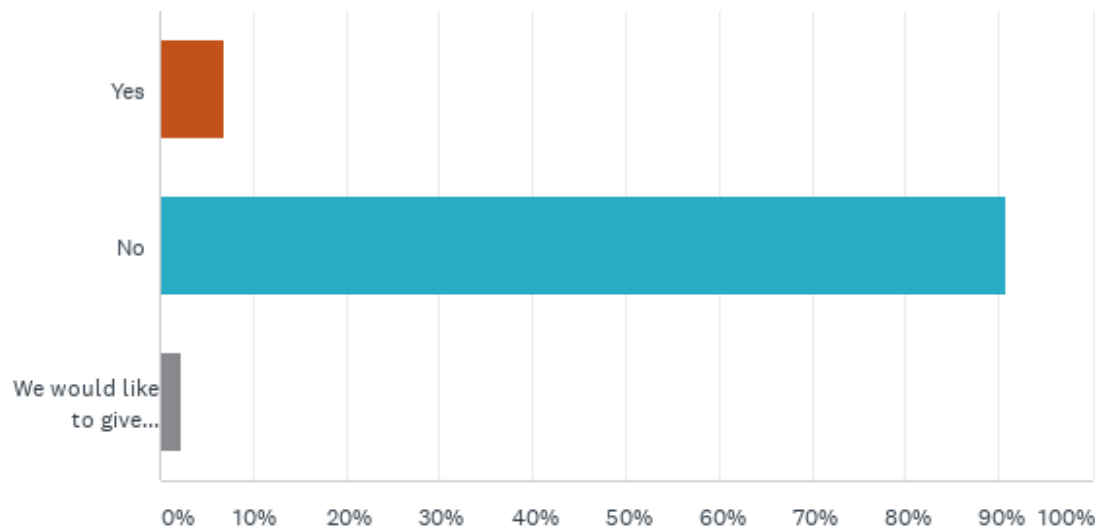


Answer Choices	Responses	
Up 0 - 10%	20.93%	9
Up 10 - 20%	20.93%	9
Around the same as in 2019	18.6%	8
Down 1 - 20%	20.93%	9
Down 20 - 30%	9.3%	4
Down 30 - 40%	4.65%	2
Down 40 - 50%	2.33%	1
Down 50 - 60%	0.0%	0
Down 60 - 70%	0.0%	0
Down 70 - 80%	0.0%	0
Down 80 - 100%	0.0%	0
Other	2.33%	1
ANSWER CHOICES		43

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q3. Has your business been affected by Test and Trace?

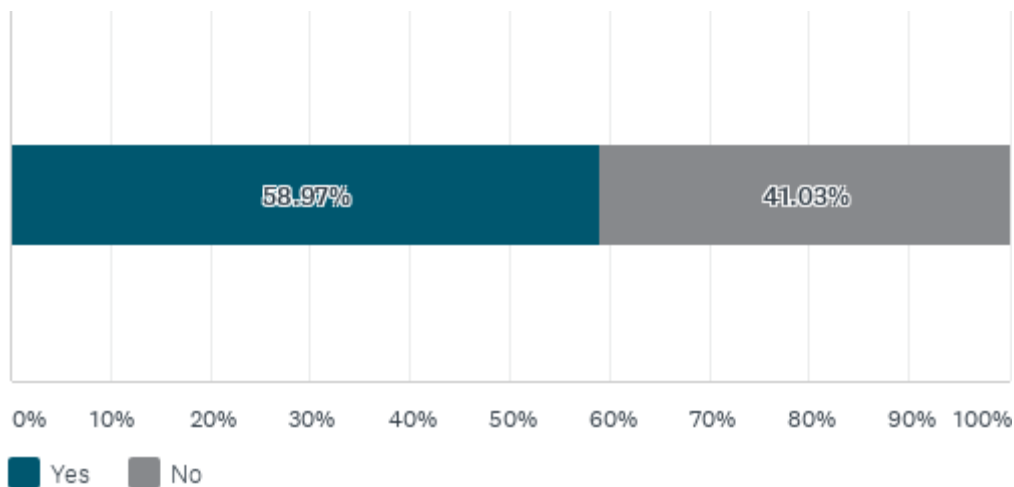


Answer Choices	Responses	
Yes	6.98%	3
No	90.7%	39
TOTAL		42

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



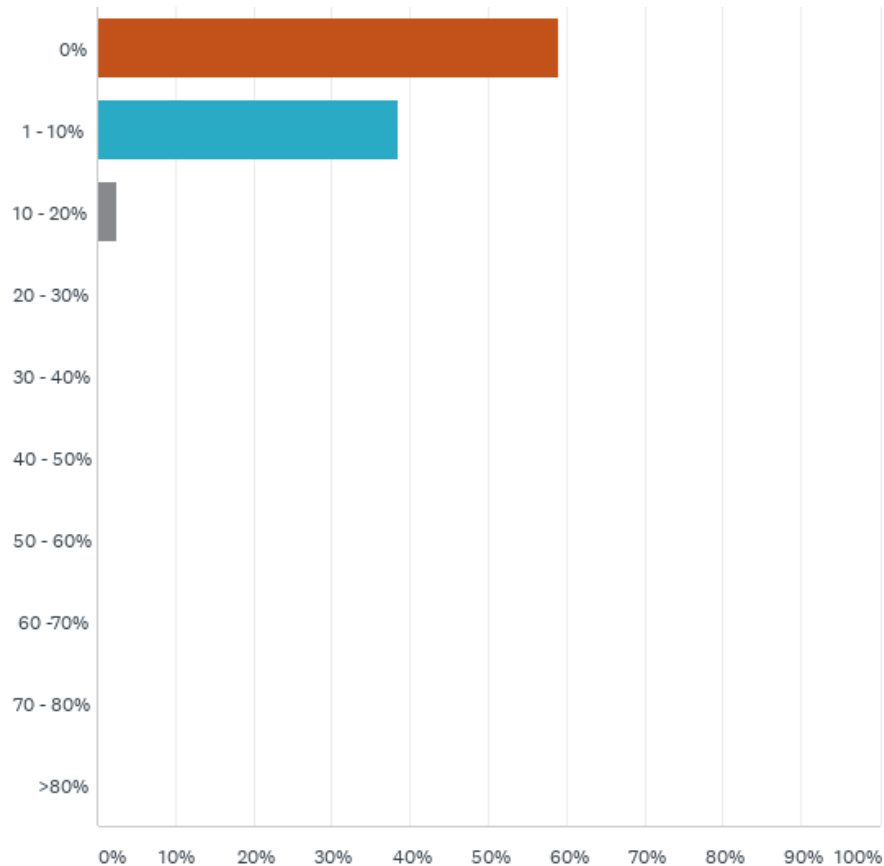
Q4. Have you brought furloughed staff back into your business during September 2020?



Answer Choices	Responses	
Yes	58.97%	23
No	41.03%	16
TOTAL		39



Q5. What percentage of your overall business is still on furlough?

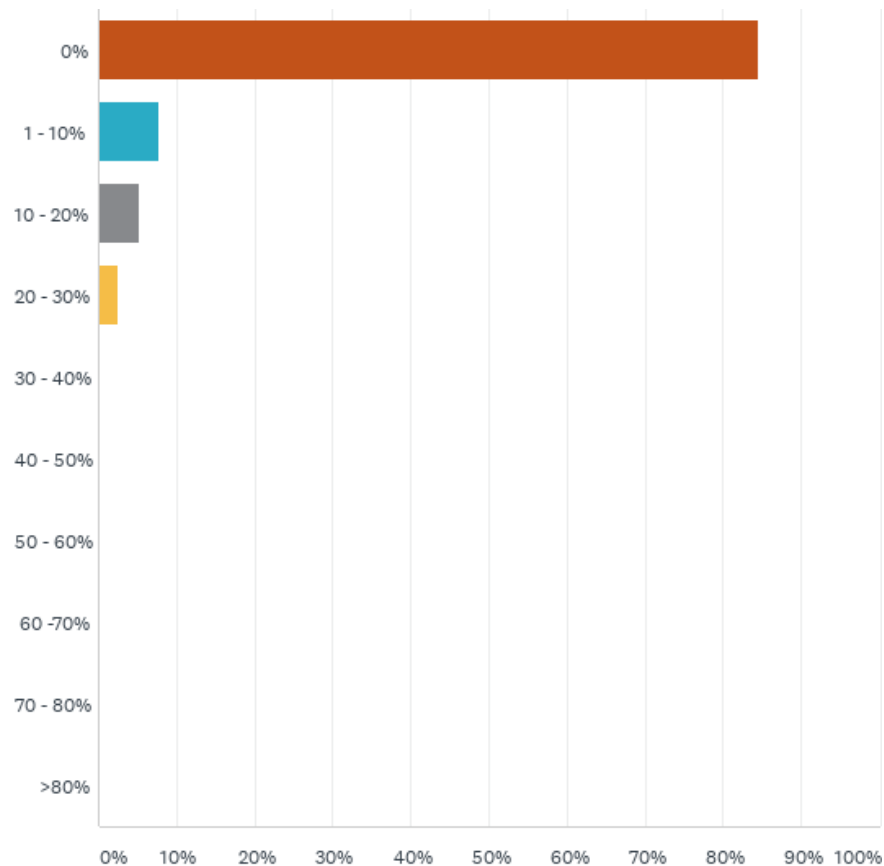


Answer Choices	Responses	Count
0%	58.97%	23
1 - 10%	38.46%	15
10 - 20%	2.56%	1
20 - 30%	0.0%	0
30 - 40%	0.0%	0
40 - 50%	0.0%	0
50 - 60%	0.0%	0
60 - 70%	0.0%	0
70 - 80%	0.0%	0
80 - 100%	0.0%	0
TOTAL		39

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q6. What proportion of your sales and customer service team that supports the wholesaler is still on furlough?

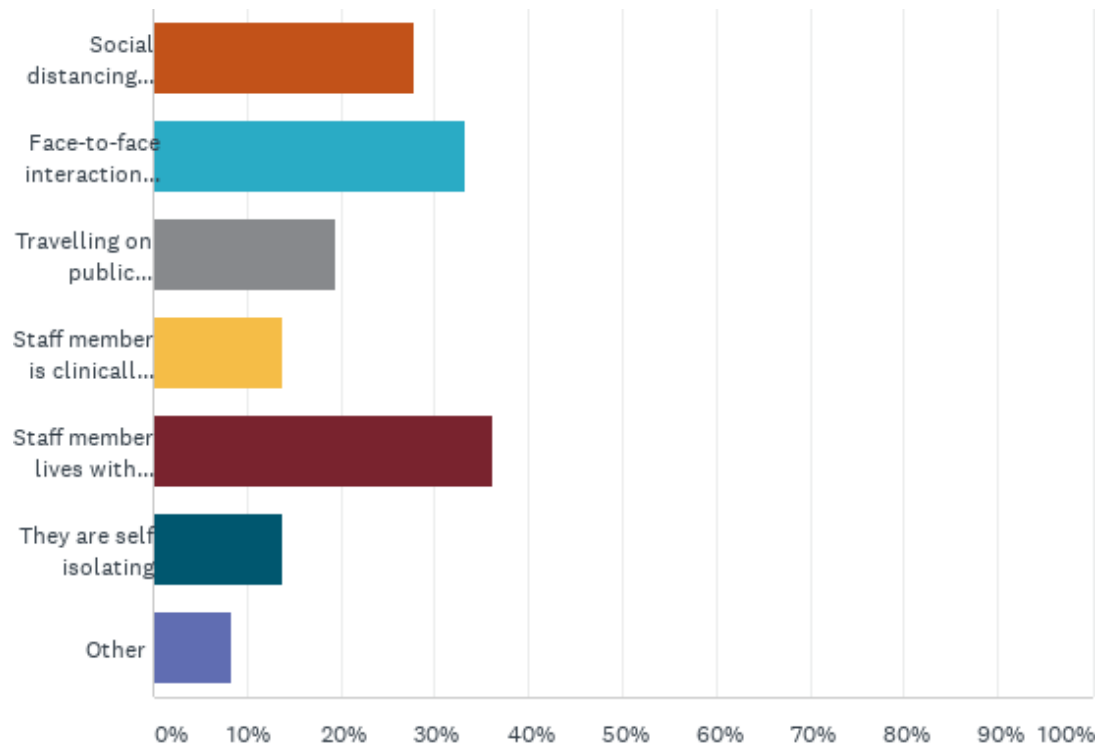


Answer Choices	Responses	
0%	84.62%	33
1 - 10%	7.69%	3
10 - 20%	5.13%	2
20 - 30%	2.56%	1
30 - 40%	0.0%	0
40 - 50%	0.0%	0
50 - 60%	0.0%	0
60 - 70%	0.0%	0
70 - 80%	0.0%	0
80 - 100%	0.0%	0
TOTAL		39

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q7: If your teams have raised concerns over returning to work, which of the following reasons have your team cited?

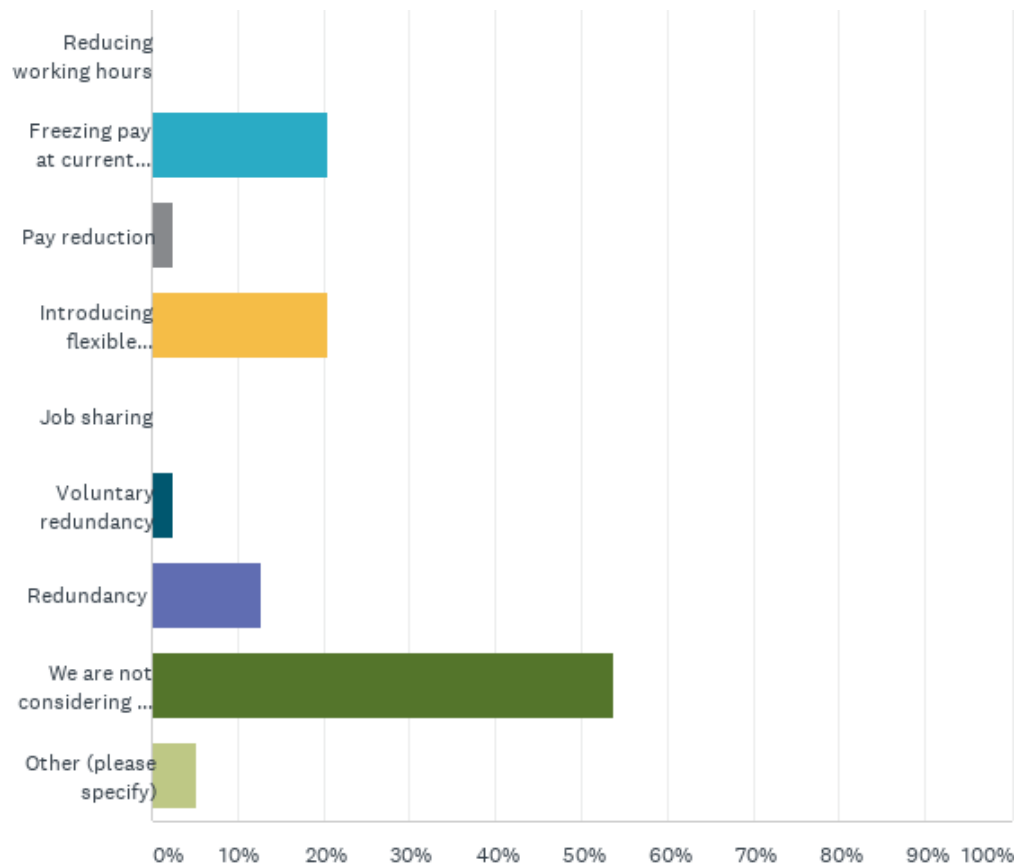


Answer Choices	Responses	Count
Social distancing concerns between members of staff	27.78%	10
Face-to-face interaction with customers	33.33%	12
Travelling on public transport to and from place of work	19.44%	7
Staff member is clinically vulnerable or extremely clinically vulnerable	13.89%	5
Staff member lives with someone who is clinically vulnerable or extremely clinically vulnerable	36.11%	13
They are self isolating	13.89%	5
Other	8.33%	3
TOTAL		36

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q7: Your people are your most important asset but some businesses are facing difficult decisions. Is your business considering any of the following?

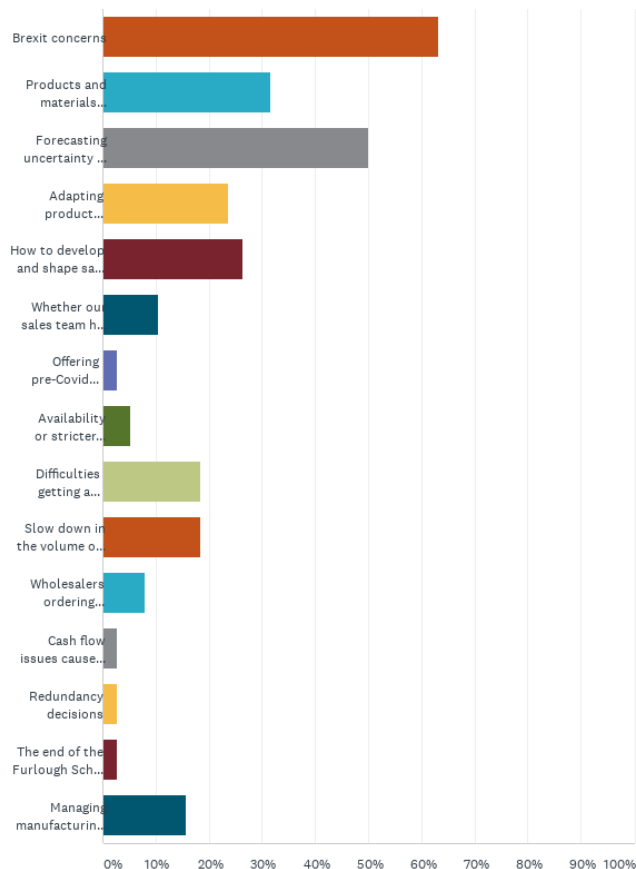


Answer Choices	Responses	Count
Reducing working hours	0.0%	0
Freezing pay at current levels	20.51%	8
Pay reduction	2.56%	1
Introducing flexible working arrangements	20.51%	8
Job sharing	0.0%	0
Voluntary redundancy	2.56%	1
Redundancy	12.82%	5
We are not considering any of the above	53.85%	21
Other (please specify)	5.13%	2
TOTAL		39

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q8: What are the three greatest challenges your business is facing at this time?



Answer Choices	Responses	Count
Brexit concerns	63.16%	24
Products and materials availability concerns, particularly from overseas which will impact on our ability to supply	31.58%	12
Forecasting uncertainty and challenges	50.0%	19
Adapting product labelling to meet post-Brexit requirements	23.68%	9
How to develop and shape sales teams to service the wholesale channel	26.32%	10
Whether our sales team have the skills to sell virtually	10.53%	4
Offering pre-Covid levels of customer service to deal with trade enquiries	2.63%	1
Availability or stricter terms of Trade Credit Insurance	5.26%	2
Difficulties getting a face-to-face appointment to meet our wholesaler customers	18.42%	7
Slow down in the volume of orders from the wholesale channel	18.42%	7
Wholesalers ordering smaller volumes of product in each order	7.89%	3
Cash flow issues caused by a slow down in payment from wholesalers	2.63%	1
Redundancy decisions	2.63%	1
The end of the Furlough Scheme on 31 October 2020 which is being replaced by the less generous Job Support Scheme	2.63%	1
Managing manufacturing output when it is difficult to predict demand	15.79%	6
Other challenges not listed above:		2
TOTAL		38

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q9: Challenges cited, by manufacturer respondents, regarding product supply and keeping wholesalers fully stocked

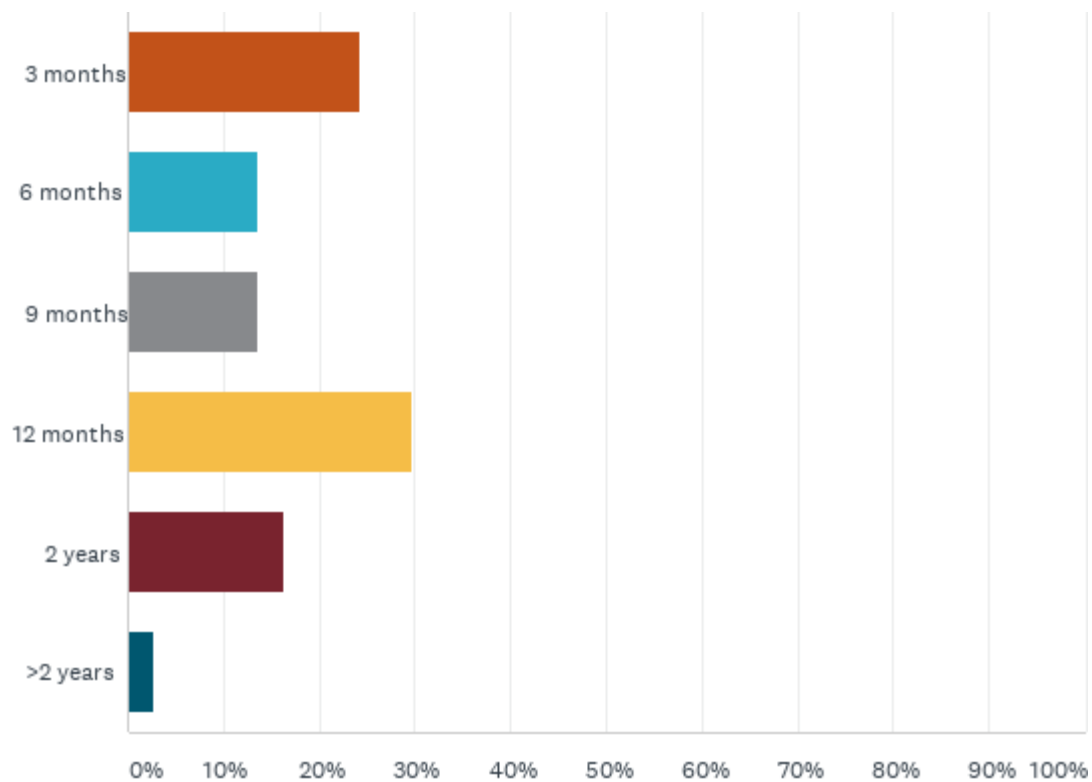
- difficult to forecast with previous accuracy
- Wholesalers do appear to be ordering minimum quantities.
- Shipping issues from China - delays of up to 3 weeks
- Not foreseeing buoyant sales and therefore production lines were not primed
- Steel Shortages
- Delays in ports
- Massive demand has placed pressure on the production teams who are now double shifting to clear order backlog.
- Delays at Ports and slow down on manufacturing due to social distancing measures
- none at the moment
- Busy shipping ports
- UK suppliers still furloughed
- Lack of safe spacing to be able to fully staff production



SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q10: How long do you think it will be before our sector reaches pre COVID-19 turnover levels?

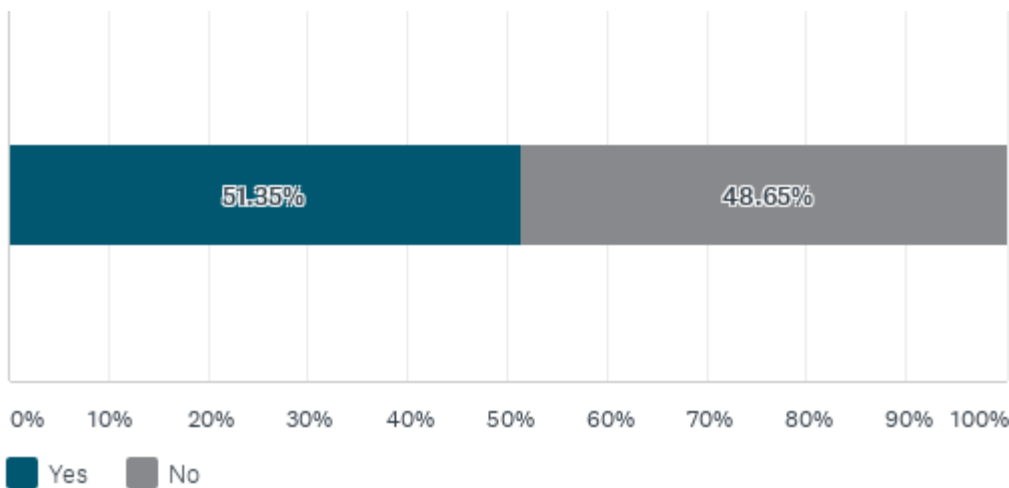


Answer Choices	Responses	Count
3 months	24.32%	9
6 months	13.51%	5
9 months	13.51%	5
12 months	29.73%	11
2 years	16.22%	6
> 2 years	2.7%	1
TOTAL		37

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)



Q11: Do you feel more optimistic now than you did last month?



Answer Choices	Responses	
Yes	51.35%	19
No	48.65%	18
TOTAL		37

SURVEY COVID-19 Affiliate Impact Survey: October 2020 (looking back at September)