

SILVERTOWN TUNNEL

BUSINESS SURVEY 2013-2015



CONFIDENTIAL

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SILVERTOWN TUNNEL
BUSINESS SURVEY 2013-2015
Transport for London

Final Report
Confidential

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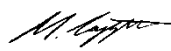


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1 EXECUTIVE SUMMARY

1.1 INTRODUCTION

- 1.1.1 In 2013 WSP Group was commissioned by Transport for London (TfL) to undertake a survey of local businesses in East London, reviewing attitudes towards proposed river crossing options. This current study is focused on the proposed Silvertown Tunnel, drawing comparison with data from 2013 where relevant.
- 1.1.2 The key objective of this study is to provide updated information of business activity and opinion relative to the Silvertown Tunnel since the baseline survey of 2013 in the area most likely to be influenced by it. In particular, the aims of the research are as follows:
- To meet the evidence base requirements (set out within WebTAG A2.2) for inputs into a regeneration report to help underpin the business case for the Silvertown Tunnel; and
 - To gauge business reaction to the specific consultation proposals under consideration to further guide development of the Tunnel.
- 1.1.3 This report sets out the methodology for undertaking the survey, including the sample profile and key findings of the research. More detailed information on the profile of local businesses, to feed into the regeneration report, is given in Appendix C.

1.2 PROJECT BACKGROUND

- 1.2.1 East London is one of the largest regeneration areas in the UK and the sub-region with the biggest physical capacity for growth in the South East. With the area expected to accommodate the largest proportion of homes and jobs in London, the delivery of development in this area is absolutely essential to maximise London's significant economic potential. However, current river crossings are already operating over capacity, resulting in congestion and unreliable journey times. There is therefore a need to provide additional capacity to address these issues being experienced today, as well as to facilitate the additional trips that will come from future growth.
- 1.2.2 The Silvertown Tunnel is one of a package of river crossings that is intended to achieve these objectives. TfL is currently exploring the impacts of the proposed Silvertown Tunnel as part of a planning application through the Development Consent Order process. The key objective of this study is to provide an update of the baseline of business activity (in terms of characteristics and performance) in the area most likely to be influenced by the proposed Silvertown Tunnel.

1.3 SURVEY METHODOLOGY

- 1.3.1 The survey was undertaken through computer assisted telephone interviews (CATI) with businesses in the study area, comprising the following boroughs of East and South London: Tower Hamlets, Newham, and Barking & Dagenham (north of the River Thames); and Southwark, Lewisham, Greenwich and Bexley (south of the River Thames).
- 1.3.2 The sampling frame was developed based on data from both the Dunn and Bradstreet commercial database and the 2013 Business Register and Employment Survey (BRES), undertaken by the Office for National Statistics, and stratified by borough, sector and size (number of employees). The sectors sampled included: Primary / Manufacturing; Construction; Transport, Retail and Distribution (TRAD); and Services (further subdivided by Private and Public Services). Section 3.1 provides further detail about these sources and development of the sample frame.

- 1.3.3 Businesses in transport-dependent sectors and of larger size (200+ employees) were slightly oversampled within the interviews, to capture the views of those likely to be most impacted by the Scheme. This is consistent with WebTAG A2.2. Businesses of 200+ employees are fewer in number, but employ a significant proportion of total employees in the area than smaller businesses. As the data matched pre-defined quotas of the overall business profile in the study area (both in terms of business sector and size), no weighting was required to provide a robust evidence base. Further information about the sample profile and weighting can be found within Section 2 of this report.
- 1.3.4 A draft questionnaire was developed in consultation with TfL, ensuring that it met the WebTAG Unit A2.2 requirements and replicated selected questions from the 2013 baseline survey. In total, 501 telephone interviews were undertaken amongst the seven boroughs by Accent research, on behalf of WSP and TfL, between 23 June – 24 July 2015. In addition, 15 depth interviews were conducted with selected businesses who agreed to be re-contacted to provide detailed case studies.

1.4 KEY FINDINGS

- 1.4.1 Key findings of the research are:

The outlook in terms of business turnover is positive, which suggests there is strong potential for growth across East London

- The largest proportion of respondents expecting an increase in business turnover was in the 50-199 number of staff group. A far smaller proportion of respondents expect a decrease in turnover within the next 12 months. In terms of expected changes to turnover within the next 12 months, the outlook is generally positive, with the proportion of respondents expecting a turnover increase far outweighing those that expect a fall in turnover

The Blackwall Tunnel is considered the most important river crossing in East London

- Amongst those that consider crossing the Thames important to their business (271) the Blackwall Tunnel is viewed as the most important by over half.

Current river crossing options, particularly at Blackwall, are not adequate, resulting in congestion and poor journey time predictability when crossing the River

- There is strong consensus that current crossing options are not adequate (68% of all businesses surveyed). Just 14% said they felt there was no need for additional capacity
- A large majority (74%) of all businesses said that daily congestion when crossing the Blackwall Tunnel is a disruption or constraint to their business
- Nearly two thirds (62%) of all businesses think that the predictability of the journey time to cross the river at the Blackwall Tunnel is poor. Just 7% think that journey time predictability at Blackwall is good

Congestion and poor journey time predictability at the Blackwall Tunnel results in a range of costs and inefficiencies for businesses, which is constraining their potential growth

- 32% of all businesses surveyed build in additional time and associated costs to plan deliveries to avoid congestion at the Blackwall Tunnel
- 33% have missed time critical deliveries to their clients which have affected future business opportunities due to congestion and the Blackwall Tunnel
- 41% are often late for appointments or meetings because of congestion and poor predictability of journey times at the Blackwall Tunnel
- 37% think the current situation at the Blackwall Tunnel limits the potential number of customers that use their business
- As a result 40% of all businesses think that the current number and capacity of crossings in East London is a barrier to the development of their business on the other side of the River. This rises to 49% in the host Boroughs of Tower Hamlets and Greenwich

Poor quality river crossings, particularly at the Blackwall Tunnel, is resulting in problems accessing a reliable labour force, which is a problem for businesses and employees

- Around one third of businesses surveyed expect to increase their staff numbers at their site over the next 12 months. Recruitment is however noted as an issue. Several unprompted comments related to transport issues, in particular 15% noted the difficulty in accessing staff from across the River
- 30% of all businesses surveyed have staff that are late at least once a week due to unpredictable journey times at the Blackwall Tunnel
- This results in an average cost in these firms of around £26,000 a year, which is enough to employ another member of staff

The Silvertown Tunnel proposal, including tolling at both Blackwall and Silvertown Tunnels at a similar level to that at the Dartford Crossing, is welcomed by businesses

- Half (49%) of all businesses surveyed think the proposal will result in a positive impact for their business. Just 8% thought it would have a negative impact, with the remainder believing it would have no impact on them
- 52% of all businesses said they would be happy to pay a toll at both Blackwall and Silvertown Tunnels if it meant that journey times were made more predictable and congestion was reduced. Just 30% disagreed

Businesses think that the proposal, including tolling, would lead to the growth of their businesses

- 37% of all businesses said that it would have a positive impact to allow them to grow their business or invest at their site. Just 4% thought it would have a negative impact. The remainder said it would have little impact
- Of these 37%, 80% said it would increase their customer base, 80% said it would make it easier to reach suppliers and 24% said they would take on more staff,

1.4.2 The remainder of the report is structured as follows:

- **Section 2 – Methodology:** Explains the research methodology, including questionnaire and sample design
- **Section 3 – Business profile and operations:** Outlines in more detail the nature and profile of businesses in East London, including reported strengths and weaknesses of business location and the degree to which movement is important to operations
- **Section 4 – Business performance and outlook:** Presents business expectations for the next year in terms of economic outlook
- **Section 5 – Importance of cross-river movements:** Explores the extent to which cross-river movement is important to businesses and whether the river is reported to limit businesses development on the other side
- **Section 6 – Silvertown Tunnel:** Provides data on businesses' views about, and expectations of, implementation of the proposed Silvertown Tunnel
- **Section 7 – Case studies:** Provide a summary of depth interviews undertaken with 15 businesses

2 METHODOLOGY

2.1 SAMPLING METHODOLOGY

- 2.1.1 The sampling methodology was designed to obtain robust and representative evidence about the local business profile within the survey area. The sampling strategy agreed by WSP and TfL in 2013 was to seek a balance between representing local business profiles, whilst ensuring that 'in scope' responses provided valuable data from businesses that are dependent on transportation. This is an approach which is consistent with WebTAG A2.2. The sample frame was drawn from workplaces / establishments (site-based) rather than from enterprises (business-based) since issues faced could vary significantly in different parts of the study area, even within the same overall controlling business.
- 2.1.2 The Dunn and Bradstreet business database was used to obtain a sample of businesses within the study area, defined by:
- Borough of site
 - Number of employees
 - Business sector (based on 2007 Standard Industry Classification (SIC) codes)
- 2.1.3 Public sector organisations are likely to have different needs to private sector organisations and are therefore sampled separately within the service sector, drawing a sample of sufficient magnitude across all workplace sizes to facilitate comparative analysis of public/private sector services (public sector = 55), as shown below in Table 2.1 along with the overall business profile in the area (Table 2.2)

An even number of interviews (c.72-3) were selected across each of the seven boroughs.

Table 2.1 Sampling frame

SIC 2007 Sector	A: 1-10 employment	B: 11-49 employment	C: 50-199 employment	D: 200+ employment	Total
A: Primary/Manufacturing	20	10	0	0	30
B: Construction	25	5	0	0	30
C: TRAD*	100	35	10	5	150
Services - Public	20	20	10	5	55
Private	120	75	25	5	225
Total	290	150	45	15	500

* TRAD = Transport, Retail and Distribution

Table 2.2 Overall Business profile (as defined by Dunn and Bradstreet 2015)

SIC 2007 Sector	A: 1-10 employment	B: 11-49 employment	C: 50-199 employment	D: 200+ employment	Total
A: Primary/Manufacturing	5%	1%	0%	0%	7%
B: Construction	5%	1%	0%	0%	6%
C: TRAD*	17%	1%	0%	0%	18%
Services - Public	7%	3%	1%	0%	11%
Private	48%	7%	2%	1%	58%
Total	82%	13%	4%	2%	100%

* TRAD = Transport, Retail and Distribution

2.2 QUESTIONNAIRE DEVELOPMENT

2.2.1 The baseline questionnaire from 2013 was used as a starting point for the questionnaire design, with TfL's project team deleting questions that were no longer relevant and adding further issues to be covered bespoke to the Silvertown Tunnel. The questionnaire is consistent with the guidance set out in WebTAG A2.2. A draft questionnaire was piloted for one day amongst a small selection of respondents to aid feedback for the final design, with the interview length being extended to an average of 25-30 minutes. A copy of the final questionnaire is provided in Appendix A

2.2.2 The questionnaire structure contained the following:

- **S – Screening questions:** To ensure participants are valid and to verify key sample information such as borough, sector and size (employee numbers)
- **A – Company information:**
 - Contact details
 - Single or multi-site and where other sites are located
 - Whether the business is primarily involved with a transport-dependent activity
 - Approximate number of new recruits per annum
 - Whether any difficulty is experienced with recruiting in this location (and if so what)
 - Turnover at this site (last financial year)
- **B – Business expectations for the next 12 months:**
 - Whether turnover is expected to change (e.g. grow, decline, remain static etc.)
 - Expected change in staff numbers (whether there will be change, direction and extent)
 - Expected change in turnover (extent)
 - Reasons for anticipating these changes- perceived barriers for growth
- **C – Location:**
 - Main benefits of business location
 - Main weaknesses of business location
 - Importance of various characteristics to successful operation of the business (e.g. characteristics of premises, access to different parts of London, labour availability and suitability, receiving goods or supplies etc.)
 - Extent to which each characteristic causes problems (if at all)
 - Whether expecting to relocate within the next 12 months
 - Whether expecting to find suitable premises in South / East London and if relevant why / why not
- **D – Deliveries:**
 - Number, value, and location of delivery sources
 - Problems with deliveries and estimated financial impact on the business

→ **E – Customer and business trips**

- Ease of access for customers / access to market
- Location of key accounts and number of site visits by mode
- Number of business trips from site by mode

F – Reliance on crossing the Thames in Silvertown / Blackwall Tunnel area

- Overall importance of different river crossings in East London to successful operation of the business
- Whether the river acts as a barrier to the development of business
- Extent of various cross-river transport issues current impact business operations
- Consequences of these impacts

→ **G – Views on Silvertown Tunnel**

- Likely impact of the Silvertown Tunnel on businesses
- Extent of agreement with a number of statements about the potential impact of Silvertown Tunnel being (or not being) delivered to their business
- Whether businesses consider various outcomes as likely to occur (e.g. improve the local economy) as a result of delivery of the Silvertown Tunnel

2.3 FIELDWORK AND SAMPLE PROFILE

2.3.1 Fieldwork was conducted by CATI between 23 June – 24 July 2015 inclusive, with an average interview length of 28 minutes. The profile of the achieved sample is summarised in Table 2.3

Table 2-3 Sample Profile

Sample Profile	1-10 staff		11-49 staff		50-199 staff		200+ staff		Total
	sample	quota	Sample	quota	sample	quota	sample	Quota	
Primary/Manufacturing	15	20	11	10	1	0	1		28
Construction	24	25	6	5		0			30
TRAD*	108	100	36	35	10	10	3	5	157
Services- Public	19	20	23	20	8	10	7	5	57
Private	121	120	78	75	25	25	5	5	229
Total	287	290	154	150	44	45	16	15	501

	Tower Hamlets	Newham	Barking & Dagenham	Southwark	Lewisham	Greenwich	Bexley	TOTAL	Quota
Primary/manufacturing	4	4	4	4	4	5	3	28	30
Construction	5	4	5	4	4	4	4	30	30
TRAD*	23	22	21	23	23	23	22	157	150
Services- Public	4	12	11	7	12	9	2	57	55
Private	37	31	31	33	27	31	39	229	225
Total	73	73	72	71	70	72	70	501	500

* TRAD = Transport, Retail and Distribution

3 BUSINESS PROFILE AND OPERATIONS

Key findings:

Access is the greatest business concern

Consistent with data recorded in 2013, the greatest issue raised in 2015 is access (both by customers and to markets). The ease of road access has outstripped ease of public transport as the main benefit for firms located in East London, but **congestion is the main weakness for businesses located in East London**. This applies to commuting but also deliveries - the main issues businesses have with deliveries are congestion (both locally, 33%, and more widely, 17%) the other issue is parking, which is more of a problem amongst TRAD businesses (32%) and manufacturing (33%).

Central London is the most important to be accessible

Central London is the most important area for businesses within the seven East London boroughs to access (mean score 3.5), although selected areas are more important to different firms dependent on their current location.

Recruitment can be an issue to do poor quality applications, low wages and crossing the river

Recruitment is also noted as an issue – with 28% noting that the quality of applicants is poor, and 15% that low paid wages do not compete against the ‘benefit trap’. Several unprompted comments related to transport issues with recruitment, in particular 15% noted the difficulty getting to their side of the river, and 8% mentioned poor transport links (road and other).

3.1 INTRODUCTION

3.1.1 This section summarises the key findings of the interviews in terms of current business operations, covering the following:

- Strengths and weaknesses of business location
- Key areas of importance to business success
- Difficulties faced by businesses
- Importance of river crossing
- Levels of movement associated with business operation, including:
 - Staff
 - Suppliers
 - Deliveries
 - Customers
 - Locations of principal suppliers
 - Locations of principal competitors

3.1.2 Findings are given for the sample overall, with specific differences highlighted across business category where relevant. Differences between other sub-sets of respondents are highlighted only where differences are observed. Particular attention has been paid to exploring differences between borough and sector. The categories between which differences have been considered are:

Business characteristics:

- Sector (Primary / Manufacturing; Construction; Transport Retail and Distribution (TRAD), Services)
- Business size (1 – 10 employees; 11 – 49 employees; 50 – 199 employees; 200+ employees)
- Business turnover (<£50k; £50-100k; £100.01-500k; >£500k)
- Single site or operating at other sites

Business prospects / expectations:

- Expected change in employees over next 12 months (expect increase; expect no change; expect decrease),
- Expected change in turnover over the next 12 months (expect increase; expect no change; expect decrease).

Business location:

- Borough (Tower Hamlets, Newham, Barking and Dagenham, Southwark, Lewisham, Greenwich, Bexley)
- Side of the river (north / south)
- Distance from Silvertown Crossing, (0-6km; >6km)

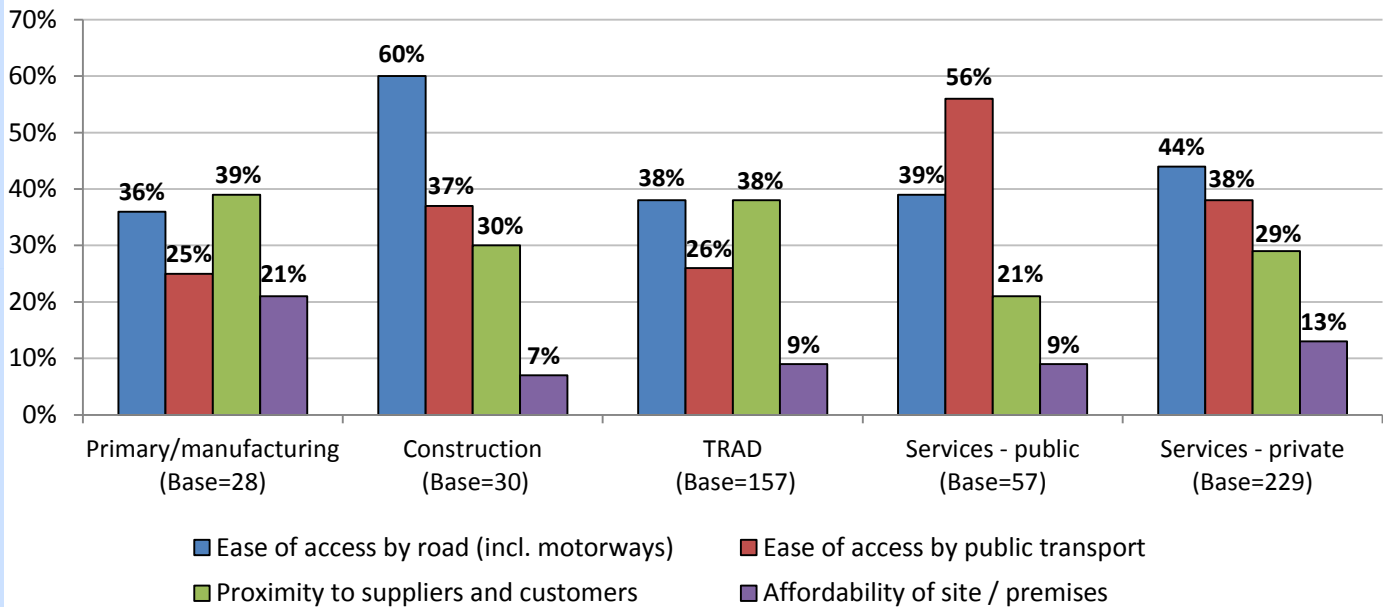
3.2 BENEFITS OF BUSINESS LOCATION

3.2.1 The top four unprompted benefits for businesses of their present location overall are:

- Ease of access by road, incl. motorways - 42% (22% in 2013)
- Ease of access by public transport - 35% by rail / DLR and 30% by bus (45% overall in 2013)
- Proximity to suppliers and customers - 31% (20% in 2013)
- Affordability of current premises - 11% (9% in 2013)

3.2.2 Accessibility reasons were cited frequently across all business types and boroughs, followed by site specific issues and staffing. The differences in response by business sector to the top four overall strengths are shown in Chart 3.1.

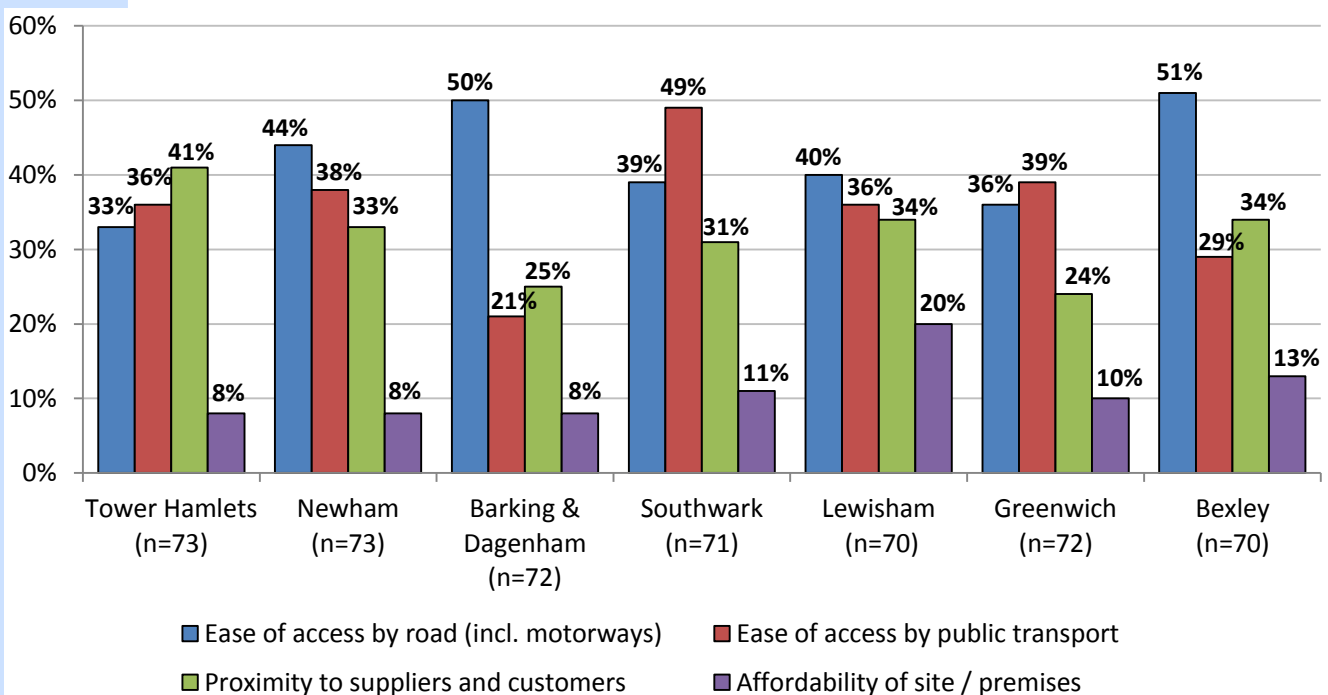
Chart 3-1 Top 4 benefits of current business location by sector (percentage of businesses)



3.2.3 Ease of road access has outstripped ease of public transport as the main benefit for firms located in East London, being most relevant to construction firms (60%, 43% in 2013). However public sector services still find public transport access the most valued asset of their location (60%, 52% in 2013). Proximity to customers and suppliers is of most significance to manufacturers and those in TRAD businesses (38%), compared to around a quarter of these businesses in 2013.

3.2.4 Good road access is the primary focus of business location within Bexley (51%, 29% in 2013) and Barking & Dagenham (50%, 21% in 2013), rising considerably since 2013. Chart 3.2 shows these benefits for the seven London Boroughs.

Chart 3-2: Top 4 benefits of current business location by borough (percentage of businesses)



3.3 WEAKNESSES OF BUSINESS LOCATION

3.3.1 Congestion is the main weakness for businesses located in East London (21%), now seen as a more significant problem than two years ago (13%); with poor reliability in crossing the Thames also on the agenda. Parking, as in 2013 is still a problem (11%, 15% in 2013), while converse to access being seen as a benefit, it is also viewed as a disadvantage by some (6%). The top four disadvantages of current business locations are as follows:

- Local congestion, time wasted in traffic - 21% (13% in 2013)
- Difficult access by road - 11% (7% in 2013)
- Parking difficulties - 11% (15% in 2013)
- Reliability of E London River Crossings, both service and times - 6% (1% in 2013)

3.3.2 In all sectors the most frequently quoted weakness of location is local congestion and time wasted in traffic (20% – 30%), with parking a particular concern for travel, retail and distribution companies (16%). Comparison by sector and borough are shown in Charts 3.3 and 3.4.

3.3.3 The boroughs are also more consistent in perception of location weaknesses than in 2013, with all citing congestion as the main problem (14-26%, compared with 7-21% in 2013).

Chart 3.3 Top four weaknesses of current business location by sector

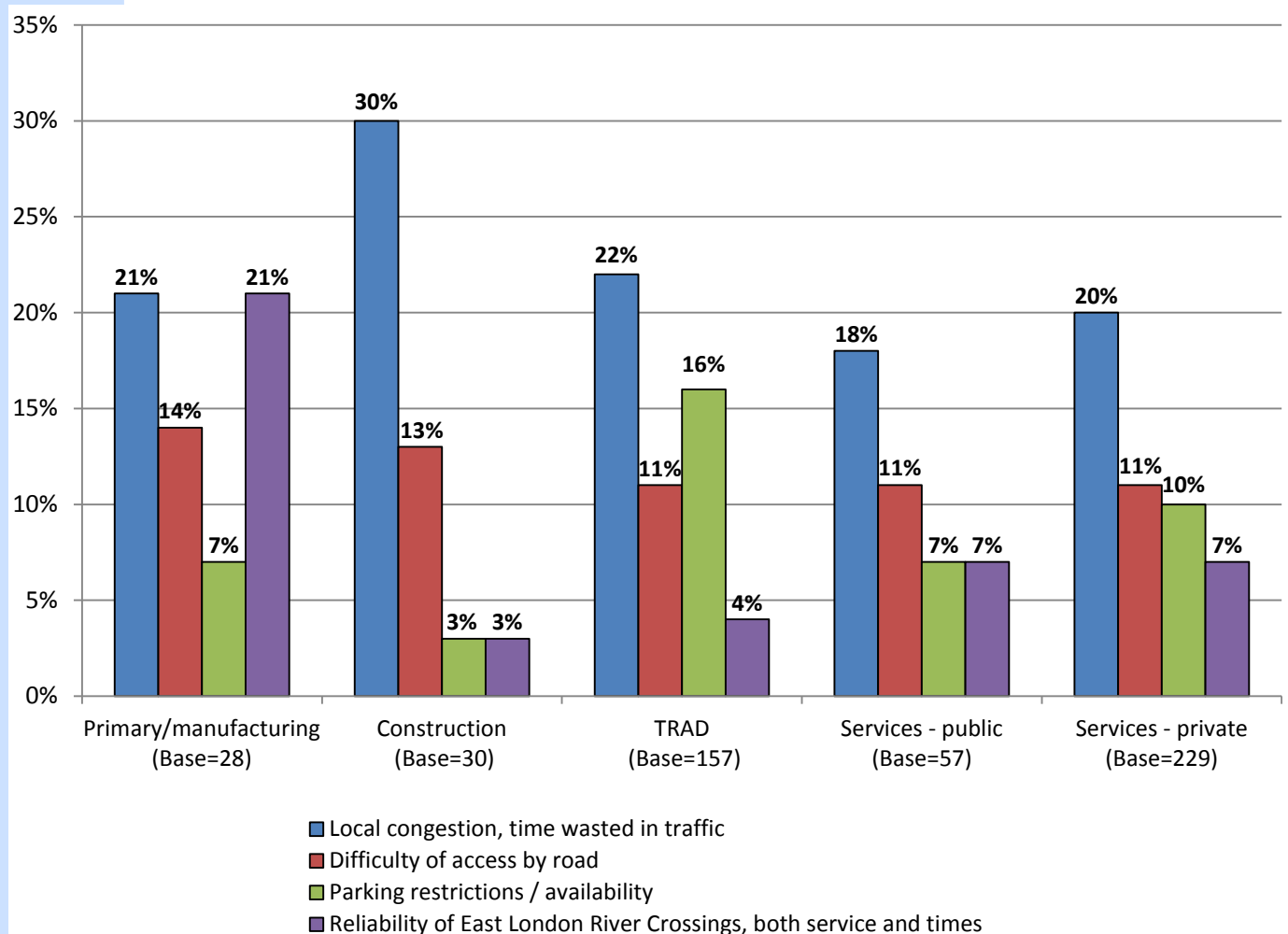
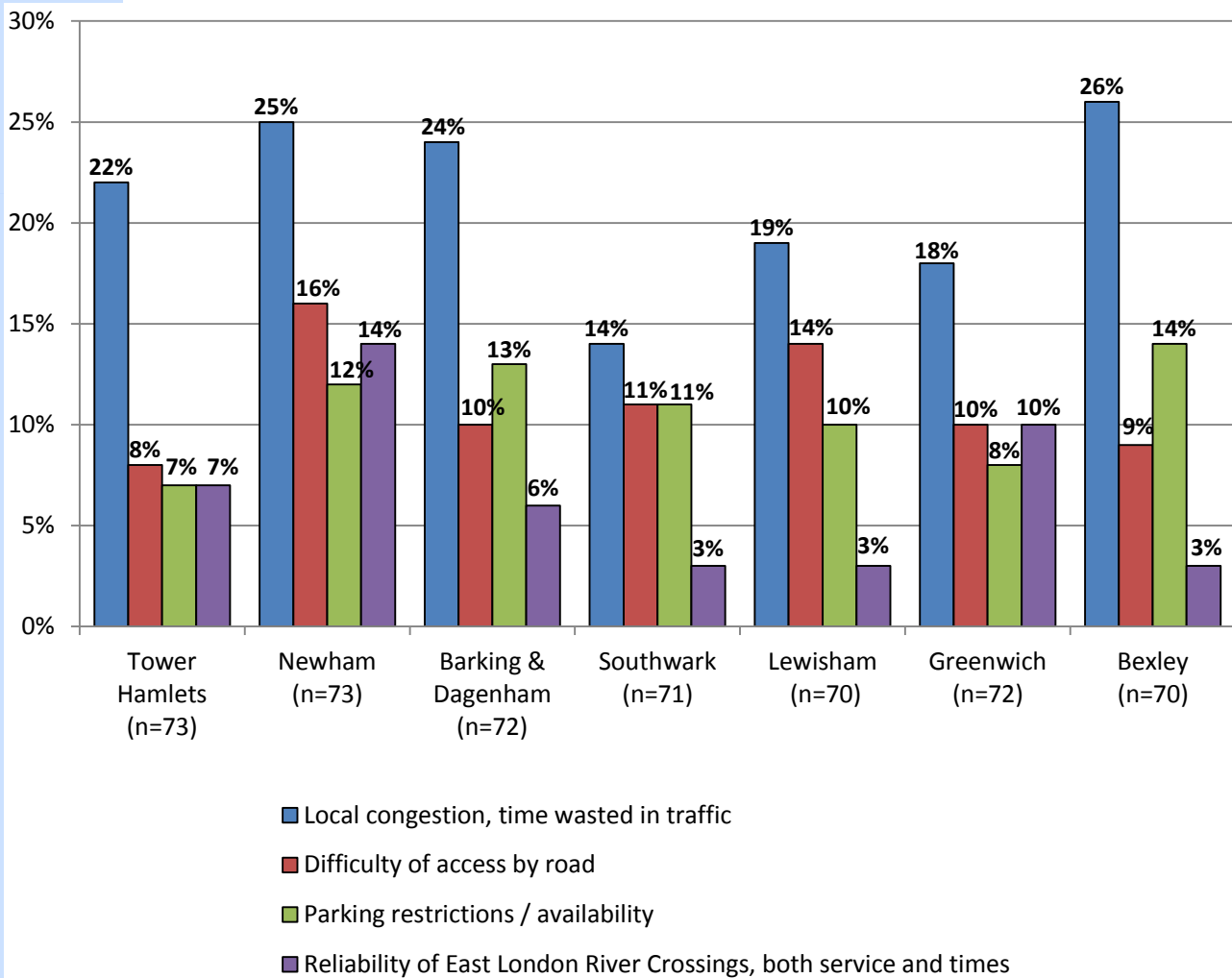


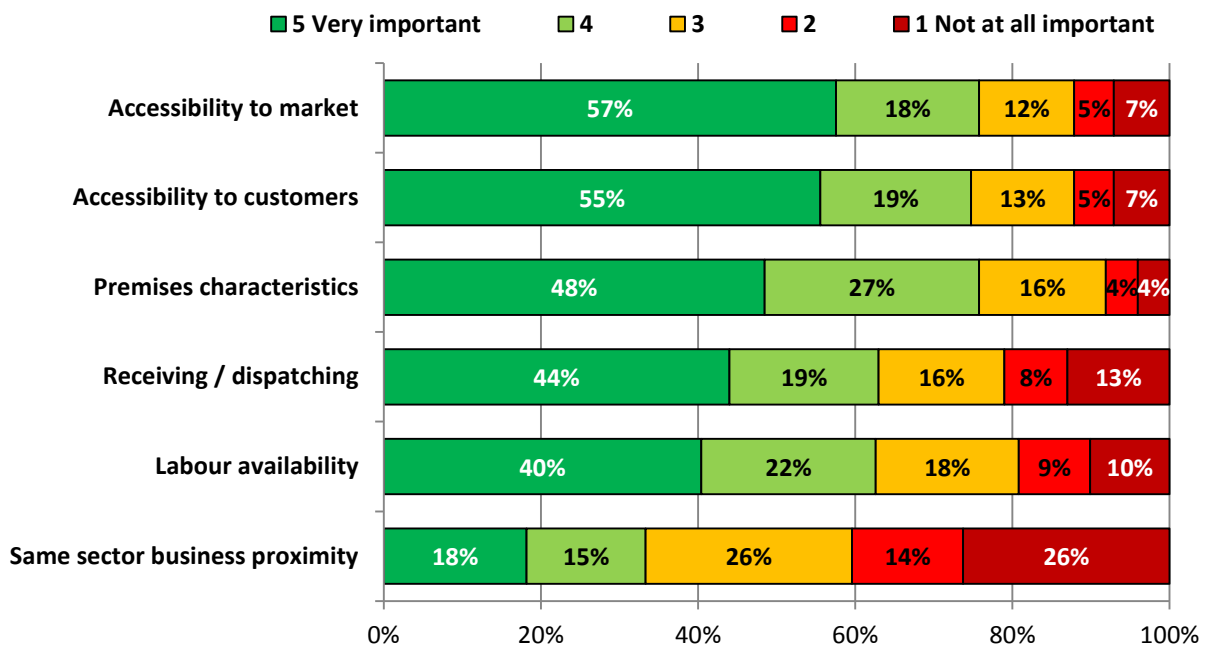
Chart 3.3 Top four weaknesses of current business location by borough



3.4 IMPORTANCE OF LOCATION ISSUES TO BUSINESS

3.4.1 Various aspects of business location were reviewed, with each company gauging how important these are on a scale from one to five, with one being not at all important and five being very important. The data is presented within Chart 3.5 with results categorised on the basis of whether the businesses are north or south of the river. Opinions are consistent with those expressed in 2013.

Chart 3.4: Importance of location issues (all businesses)

**Key:**

Premises characteristics = 'characteristics of your premises';

Labour availability = 'relevant labour and availability';

Receiving / dispatching = 'ease of receiving or dispatching supplies / goods';

Accessibility by customers = 'ease of access to this site by customers or visitors';

Accessibility to market) = 'ease of access from this site to customers, clients or markets'

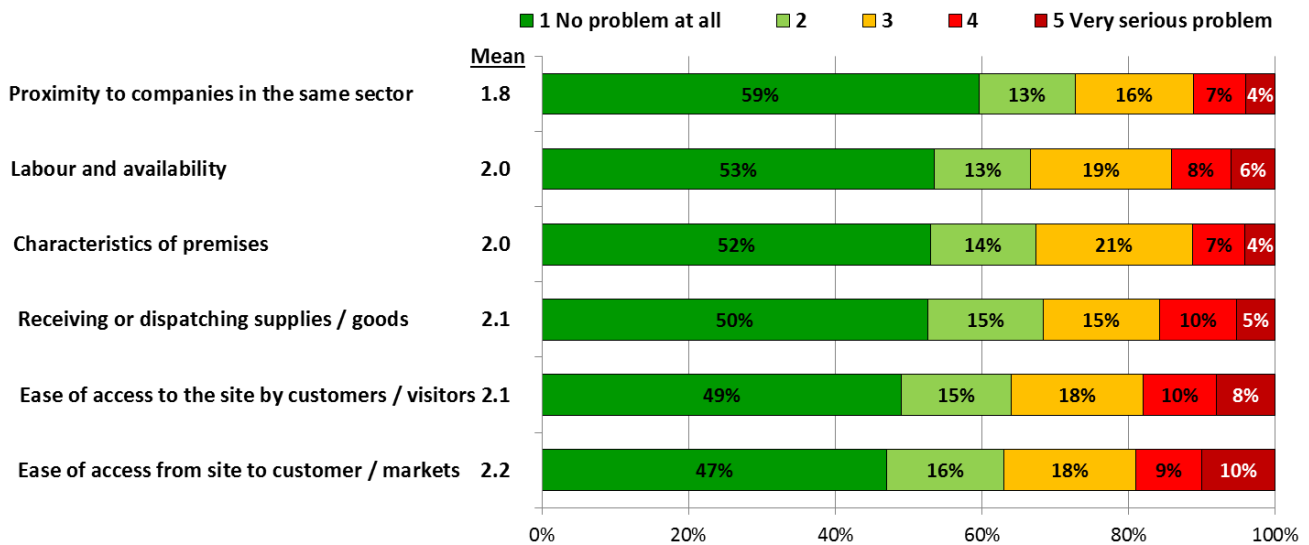
Same sector business proximity = 'proximity of other companies in the same sector'.

- 3.4.2 As in 2013, accessibility (both by customers and to market) remain amongst the most important issues for successful business operations with three quarters of firms rating them important. Equally important is the physical characteristics of the premises themselves, again consistent with 2013. Labour availability is important to 62% of firms.
- 3.4.3 Ease of receiving/dispatching goods and services provided mixed feedback, reflecting both geography and the various levels of dependency that different sectors have on goods transfer. For example, 58% of firms in Barking & Dagenham, 52% in Newham and 57% of the transport / distribution / retail companies rate receiving / dispatching of goods as very important to the running of their business, compared to 44% overall.
- 3.4.4 Proximity to other businesses obtained the most variability, with a spectrum of response equally spread from very important to not at all important.

3.5 DIFFICULTIES FACED BY BUSINESSES

3.5.1 Firms were then asked how much each aspect causes a problem to their business in its current location, as shown below in Chart 3.6.

Chart 3.5: Degree of difficulty with location issues



3.5.2 Overall the issues discussed above are seen as a problem by a minority of companies. Consistent with 2013, the greatest issue raised is access (both by customers and to markets), notified as a problem by 18-19% of firms respectively. This rises to 26% in Tower Hamlets and 25% amongst TRAD businesses in accessing markets.

3.5.3 Characteristics of premises is reported to be an issue by just 11% of firms as is proximity to companies in the same sector. Businesses in Barking & Dagenham have a greater issue with receiving and dispatching goods (29% compared with 18% overall).

3.5.4 Labour availability is not rated a significant issue for businesses in any borough (c.9-12%) apart from Newham and Bexley where this rises to 15% (Greenwich 14%). This reflects comments made elsewhere that staffing issues are consistently of less significance than matters relating to accessibility.

3.6 IMPORTANCE OF ACCESS TO DIFFERENT PARTS OF LONDON

3.6.1 Businesses in 2015 were asked about access to different parts of London and East England, with the levels of importance, with 1 –not at all important and 5 –very important, as shown in Table 3.1, ranked by mean score.

Table 3.1 Importance of access to the following:

Level of importance	1	2	3	4	5	Mean score
Central London	20%	10%	12%	16%	42%	3.5
Greenwich, Charlton and Woolwich	23%	12%	18%	18%	29%	3.2
Other parts of East London – south of the river	22%	14%	20%	16%	27%	3.1
Other parts of East London – north of the river	25%	10%	20%	18%	26%	3.1
M25	29%	12%	14%	18%	27%	3.0
Isle of Dogs / Canary Wharf	26%	15%	18%	16%	25%	3.0
A13 corridor - Barking to Rainham	34%	11%	13%	12%	28%	2.9
Kent	30%	14%	18%	16%	21%	2.8
Essex	34%	15%	15%	13%	22%	2.8
Royal Docks and City Airport	32%	15%	17%	16%	18%	2.7
Westfield / Stratford	33%	14%	17%	16%	19%	2.7
Bexley, Erith and Thamesmead	33%	14%	18%	13%	21%	2.7

- 3.6.2 Overall Central London is the most important area for businesses within the seven East London boroughs to access (mean score 3.5), although selected areas are more important to different firms dependent on their current location. Around a third note locations in Essex, A13 corridor (Barking – Rainham), Westfield, Stratford, Greenwich, Charlton and Woolwich as ‘very important’, with these being particularly important to businesses located close to them.
- 3.6.3 Other areas in East London are very important to around a quarter of businesses rising to 38% in Barking & Dagenham and 36% in Newham (for those north of the river), and 37% in Bexley (for those south of the river).
- 3.6.4 The M25 is most important to businesses based in Bexley (44%) and Barking & Dagenham (39%), while least important to those in Southwark (42%). Kent is particularly important to businesses in Bexley (44 %).

3.7 TRANSPORTING GOODS

- 3.7.1 The relative importance of moving goods and services to businesses was explored through a number of questions about their usage and spending on haulage. The vast majority of businesses (87%) receive deliveries to their site, with an average of around 50-60 deliveries a week. As would be expected, those in construction and manufacturing are likely to receive above average numbers of deliveries with the service sector the least.
- 3.7.2 Each of the sampled boroughs account for around 15% of principal suppliers; with half of businesses having principal suppliers within the rest of Greater London and 42% in South East England outside London.
- 3.7.3 The main issues businesses have with deliveries are congestion (both locally, 33%, and more widely, 17%) and parking (24%). Parking is more of a problem amongst TRAD businesses (32%) and manufacturing (33%), while local congestion is most prevalent in Tower Hamlets (44%) and amongst businesses with over 50 employees (52%). However, four in ten businesses do not experience any problems at all with their deliveries.

3.8 LABOUR AND RECRUITMENT

- 3.8.1 Nearly all businesses (92%) have recruited within the last 12 months, a significant increase on 2013 (52%), with 60% of businesses recruiting 1-5 staff last year. Lewisham saw the greatest average increase in recruitment (13 jobs) compared to 10 overall, with the construction sector also recruiting above average (15 jobs per business).
- 3.8.2 In half of businesses, the majority of applicants for these posts were from the same side of the river, with Bexley having the greatest proportion (75%) and Southwark the least (31%). Not surprisingly, the jobs found easiest / most difficult to fill are as follows:

Table 3.2. Job vacancies easiest and more difficult to fill

Easy to fill	Difficult to fill
Administrative	Managerial
Drivers	Professional
Manual / non-skilled	Trade / skilled
Bar / retail staff	Healthcare

- 3.8.3 A third of businesses that have recruited have experienced difficulties, rising to half in Lewisham. The difficulty is most noted amongst skilled / managerial and professional vacancies, with healthcare a concern in Newham and Lewisham and trade skilled in Bexley. Levels of difficulty in recruitment were the same across business sectors.
- 3.8.4 The reasons for these difficulties are widespread, with 28% noting that the quality of applicants is poor, and 15% that low paid wages do not compete against the 'benefit trap'. Several unprompted comments relate to transport issues, in particular difficulty getting to their side of the river (15%) and poor transport links (8% both by road and other).

4 BUSINESS PERFORMANCE AND OUTLOOK

Key Findings

Recruitment is expected to increase

Around one third of businesses surveyed expect to increase their staff numbers at their site over the next 12 months.

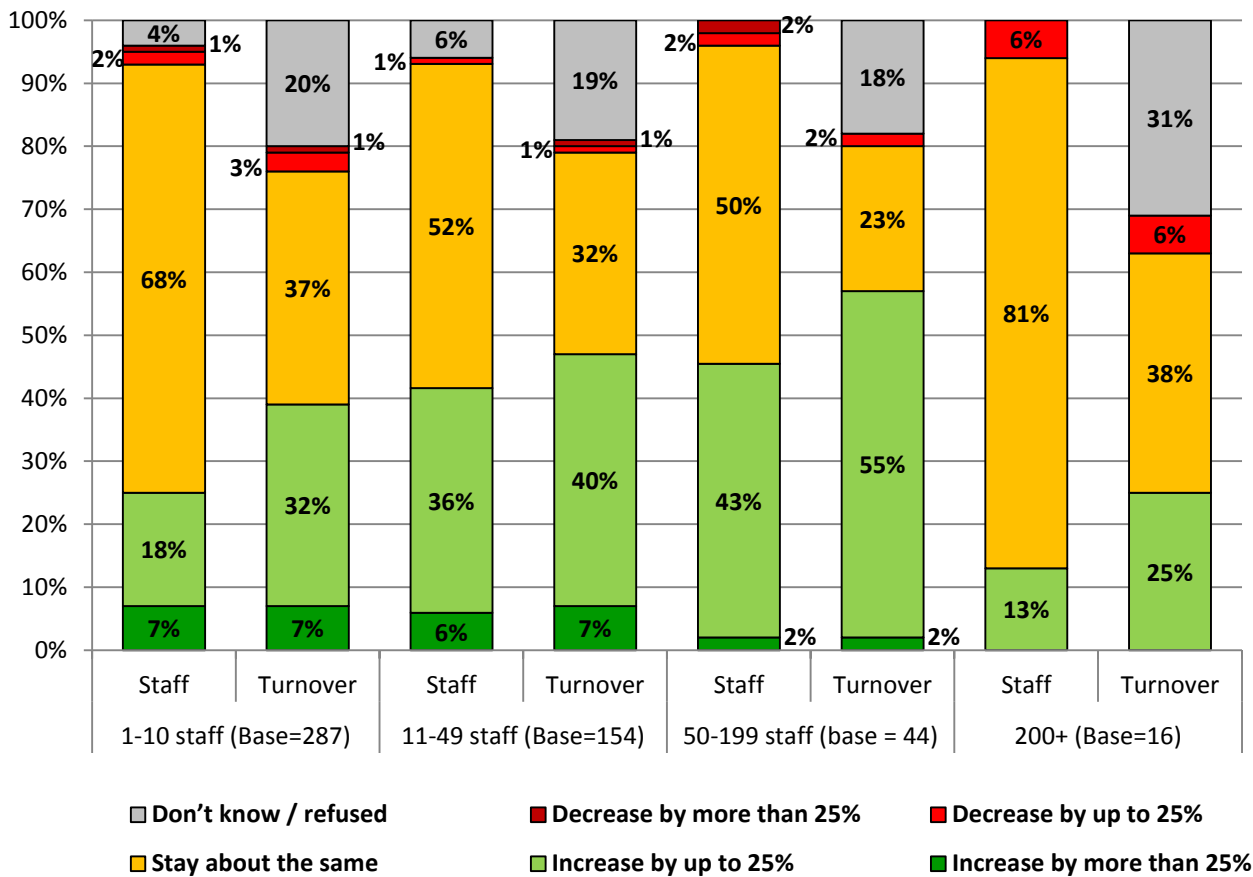
The outlook in terms of business turnover is positive

The largest proportion of respondents expecting an increase in business turnover was in the 50-199 number of staff group. A far smaller proportion of respondents expect a decrease in turnover within the next 12 months. In terms of expected changes to turnover within the next 12 months, the outlook is generally positive, with the proportion of respondents expecting a turnover increase far outweighing those that expect a fall in turnover.

4.1 EXPECTED BUSINESS PERFORMANCE – BY COMPANY SIZE

- 4.1.1 Overall, around one third of businesses surveyed (31%) expect to increase their staff numbers at their site over the next 12 months. Of these, 25% feel their staffing will increase by up to 25%, while 6% expect an increase of more than 25%. Chart 4.1 shows that businesses with 11-49 or 50-199 staff are most likely to expect their staffing levels to increase. Fewer respondents in companies with more than 200 employees expect their staffing levels to increase (13%), though the low response count (n=16) may account for this. As might be expected, smaller companies (with 1-49 staff) expect that the proportional increase in staff will be greater than 25%, while for larger companies the expected increases are smaller (up to 25%). The 2013 business survey indicated a decrease in staffing levels for most companies over the previous 12 months (around 12% of respondents in each company size group). Comparatively fewer respondents expect falling staff levels over the next 12 months (2-6%) perhaps due to improved economic conditions.
- 4.1.2 The largest proportion of respondents expecting an increase in business turnover was in the 50-199 number of staff group (57% predicting an increase in turnover), followed by the 11-49 staff group (47%) and the 1-10 staff group (39%). Of respondents in the largest staff group (200+), a quarter predict an increase in turnover. A far smaller proportion of respondents expect a decrease in turnover within the next 12 months compared to those expecting an increase. The results also compare favourably with the experiences of the 2013 survey.
- 4.1.3 Please note that some tables and charts may not add up to exactly 100% due to rounding or where respondents had the opportunity to give more than one response. Data in charts refers to percentages unless otherwise specified.

Chart 4-1: Predicted changes to turnover and staff levels over the next 12 months - by business size.



4.2 EXPECTED BUSINESS PERFORMANCE – BY BUSINESS SECTOR

4.2.1 Businesses within the area were selected by business sector, as defined by the sample list, in terms of:

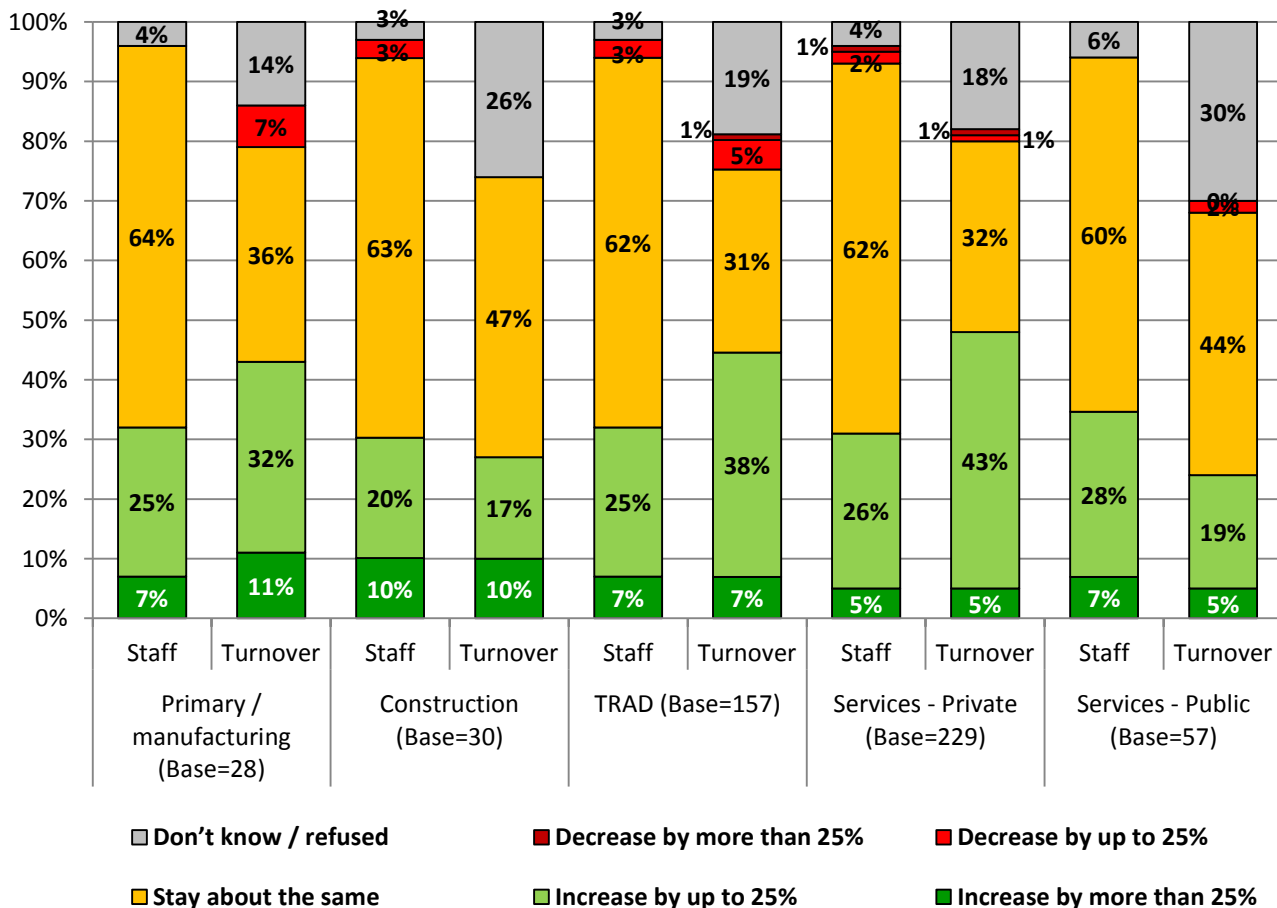
- Primary / manufacturing
- Construction
- TRAD
- Services (Private)
- Services (Public)

4.2.2 Chart 4-2 shows the expected changes in staffing and turnover within the next 12 months, by business sector, with around a third in each sector expecting increases in staff levels over the next 12 months. Those in the construction sector expect the proportional change to be larger, with 10% expecting staff levels to increase by over 25%, while those in public services expecting staffing levels to increase (at all) comprise the greatest proportion of responses by sector (35%). However, the differences between the business sectors are minor.

4.2.3 It should also be noted that few respondents by sector do not know how staffing levels are expected to change over the next 12 months (3-6%) – indicating low levels of uncertainty among businesses in the area, from all sectors.

- 4.2.4 In terms of expected changes to turnover within the next 12 months, the outlook is generally positive, with the proportion of respondents expecting a turnover increase far outweighing those that expect a fall in turnover. Businesses in the Primary/manufacturing sector have the largest variation in responses, with 11% expecting a turnover increase exceeding 25% (the largest of any group), while 7% predict a decrease in turnover of up to 25% (the largest proportion of any group).
- 4.2.5 Those in the construction business sector have a largely positive outlook on their business turnover over the next 12 months, with 27% predicting an increase (10% of which predict this to exceed 25%), and no responses to indicate a prediction of a fall in turnover.
- 4.2.6 TRAD respondents are generally positive about their business outlook, with close to half (45%) predicting an increase in turnover, and 31% predicting no change. However, 5% predict a fall of up to 25% of turnover, while 1% predict turnover will fall by a level in excess of 25%.
- 4.2.7 Those in private sector services appear to be generally more confident about their business outlook over the next 12 months, with close to half (48%) predicting that turnover will rise to some extent over the next year. Only 2% of respondents in the private services sector predict that their business turnover will fall over the next 12 months, while around a third (32%) feel it will remain constant, and 18% do not know / refused to answer the question.
- 4.2.8 Respondents in public sector services are less positive about turnover, though those expecting an increase in turnover outweigh those expecting a negative change in turnover by a ratio of 12:1. A third of respondents (30%) do not know or refused to say how they expected turnover to change in the coming 12 months, indicative of greater uncertainty in that business sector. Around half of those surveyed in the public services sector (44%) do not expect any change in turnover.

Chart 4-2 Predicted changes in turnover and staff levels over the next 12 months- by sector



4.3 EXPECTED BUSINESS PERFORMANCE – BY LONDON BOROUGH

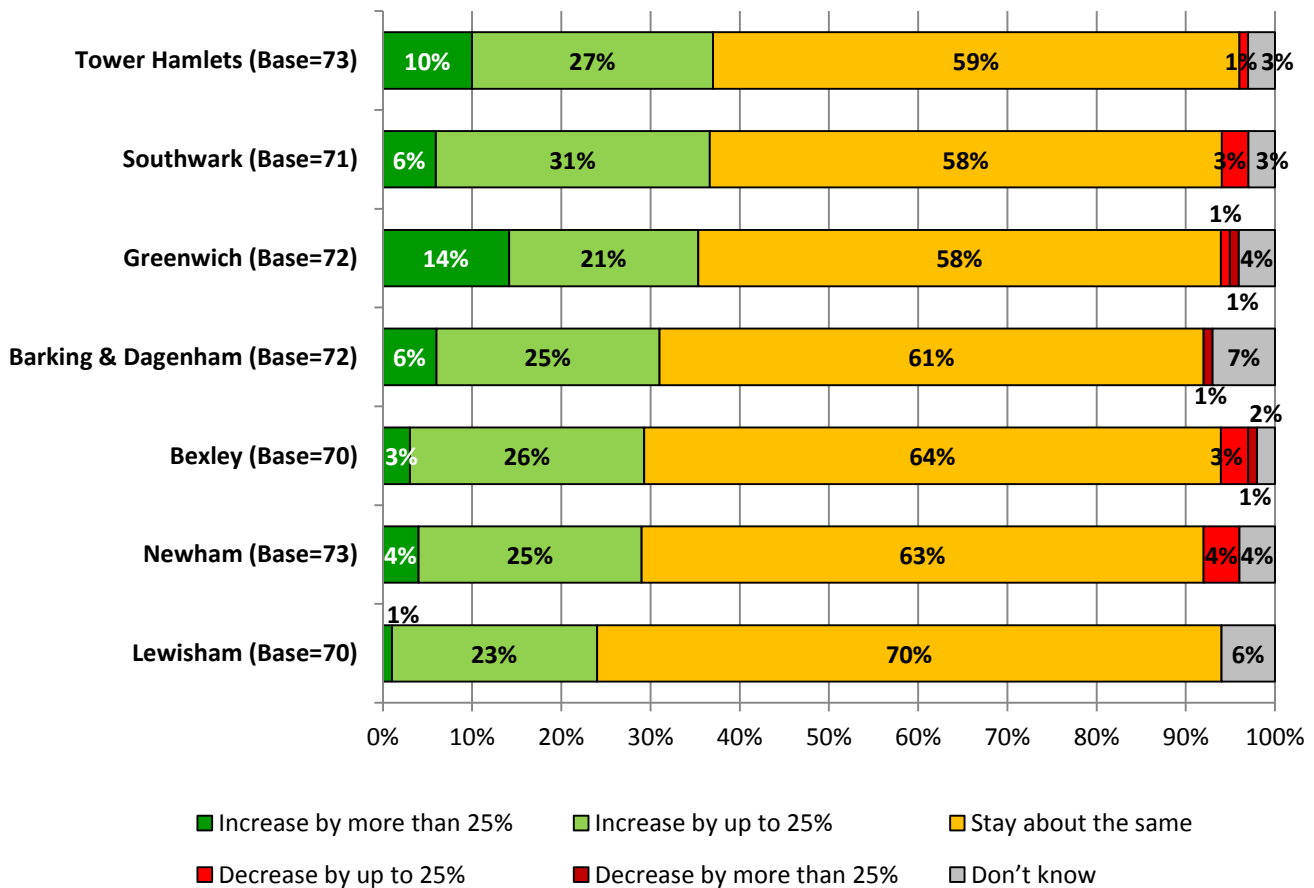
4.3.1 Businesses in seven London Boroughs surrounding the proposed Silvertown Tunnel were surveyed as to their expected changes in staffing over the next 12 months. The results are shown in Chart 4-3.

4.3.2 Respondents in Greenwich predict the greatest increase in staffing levels, with 14% predicting an increase of over 25% in the next 12 months. This is followed by Tower Hamlets (10%), Southwark (6%) and Barking & Dagenham (6%). Tower Hamlets and Southwark are the London Boroughs with the largest proportion of respondents predicting any increase in staffing (37% for both), while Lewisham (24%) and Newham (29%) have the smallest proportions predicting staff level increases within the next 12 months.

4.3.3 In terms of predicted decreases, businesses in Bexley predict the greatest fall in staffing levels, with 3% predicting a decrease of up to 25% and 2% predicting a fall of more than 25%. For all seven London Boroughs, the proportion of respondents predicting an increase in staff levels far outweighs the proportion of respondents predicting a decrease in staffing levels (by a considerable margin as Chart 4-3 shows). For all London Boroughs the proportion of respondents predicting no overall change comprises over half of the respondents, with 59% in Tower Hamlets being the smallest proportion, and Lewisham being the largest (70%). Lewisham also has no respondents predicting a decrease in staffing levels, despite the less optimistic view of businesses in that area.

4.3.4 The results therefore indicate that the majority predict no change to staffing levels across all seven London Boroughs, and those predicting an increase comprise between 24% and 37% of the sample, far outweighing the 0-5% that predict decreases in staffing levels.

Chart 4-3: Expected change in staff numbers over the next 12 months (by London Borough)



5 IMPORTANCE OF CROSS-RIVER MOVEMENTS

Key Findings

The Blackwall Tunnel is considered the most important river crossing

Amongst those that consider crossing the Thames important to their business (271) the Blackwall Tunnel is viewed as the most important by over half. Around a quarter of businesses (26%) feel that poor accessibility via the Blackwall Tunnel has reduced their customer base.

Congestion and poor journey time predictability when crossing the River are major issues for businesses

A large majority (74%) of all businesses said that daily congestion when crossing the Blackwall Tunnel is a disruption or constraint to their business.

Nearly two thirds (62%) of all businesses think that the predictability of the journey time to cross the river at the Blackwall Tunnel is poor. Just 7% think that journey time predictability at Blackwall is good.

Congestion and poor journey time predictability at the Blackwall Tunnel results in a range of costs and inefficiencies for businesses, which is constraining their potential growth

Around a third (32%) of all businesses surveyed build in additional time and associated costs to plan deliveries to avoid congestion at the Blackwall Tunnel.

33% have missed time critical deliveries to their clients which have affected future business opportunities due to congestion and the Blackwall Tunnel.

41% are often late for appointments or meetings because of congestion and poor predictability of journey times at the Blackwall Tunnel.

37% think the current situation at the Blackwall Tunnel limits the potential number of customers that use their business. As a result 40% of businesses think that the current number and capacity of crossings in East London is a barrier to the development of their business on the other side of the River. This rises to 49% in the host Boroughs of Tower Hamlets and Greenwich.

Poor quality river crossings, particularly at the Blackwall Tunnel, is resulting in problems accessing a reliable labour force, which is a problem for businesses and employees

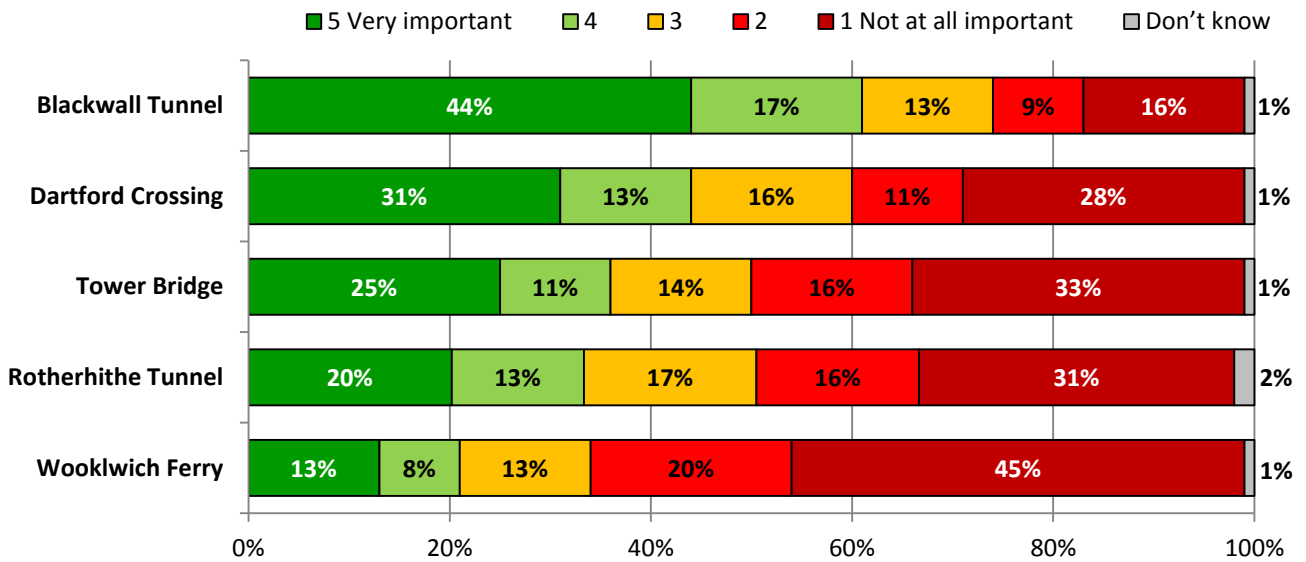
Around one third of businesses surveyed expect to increase their staff numbers at their site over the next 12 months. Recruitment is however noted as an issue. Several unprompted comments related to transport issues, in particular 15% noted the difficulty in accessing staff from across the River.

30% of all businesses surveyed have staff that are late at least once a week due to unpredictable journey times at the Blackwall Tunnel. This results in an average cost in these firms of around £26,000 a year, which is enough to employ another member of staff.

5.1 IMPORTANCE OF CROSSING THE RIVER IN EAST LONDON

- 5.1.1 Amongst those that consider crossing the Thames important to their business (271) the Blackwall Tunnel is viewed as the most important by over half (52%), followed by Dartford (24%) and Tower Bridge(14%).

Chart 5.1: Importance of river crossings in East London – base = all (501)

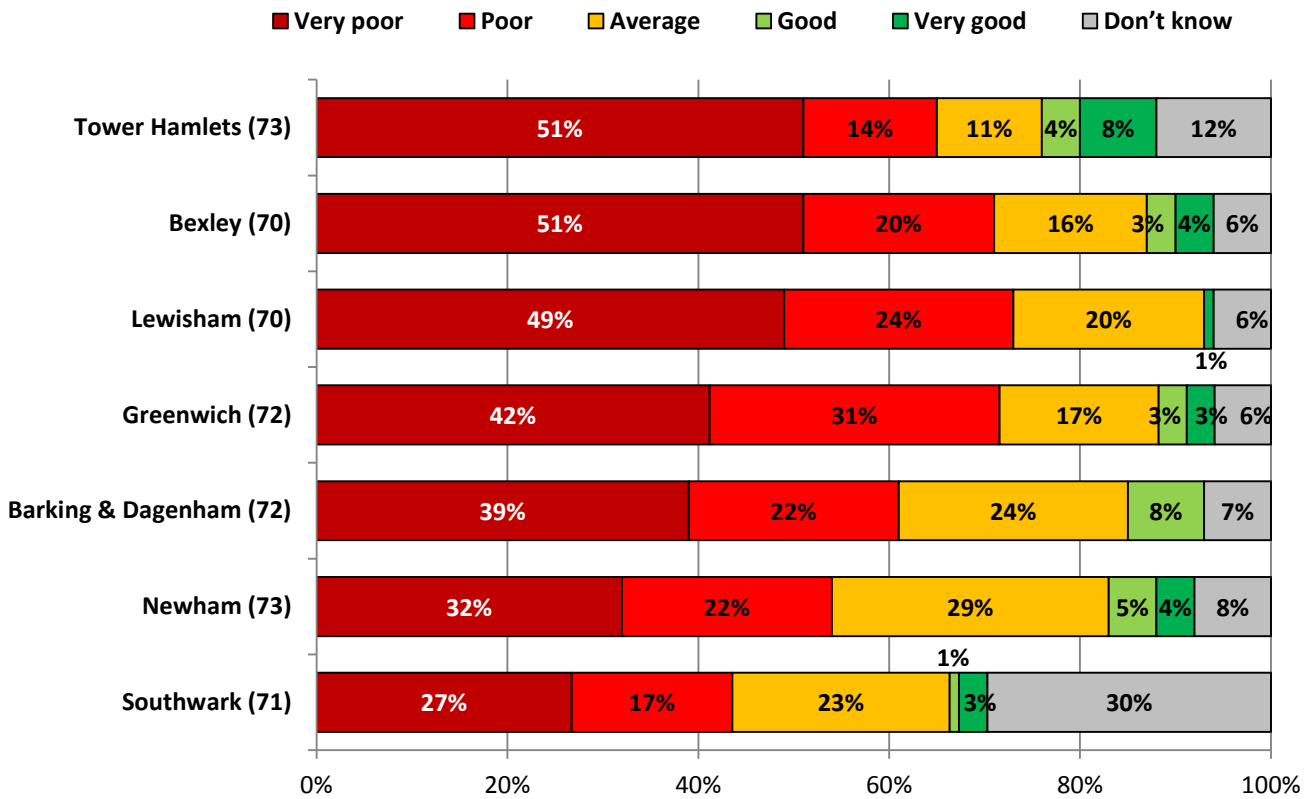


5.1.2 The importance of the crossing is heavily influenced by the location of the business itself, with those operating in Bexley and Barking & Dagenham noting that the Dartford Tunnel is the most important to them, while those in Southwark favour Tower Bridge. Levels of importance are similar across all sizes of business.

5.1.3 Four in ten businesses within the sampled boroughs feel that the current number and capacity of river Crossings in East London act as a barrier to the development of their business across the other side of the river. This rises to 49% in Tower Hamlets and Greenwich, and 53% amongst businesses with £1m turnover or more.

5.1.4 Overall (taking account of any predictable delay from everyday congestion), the predictability of current journey times for road traffic crossing the Thames in the Silvertown / Blackwall Tunnel area are displayed below in Chart 5.2. The majority (62%) consider predictability poor, with this highest in Bexley (71%) and amongst construction companies (83%). Southwark is an anomaly, with almost a third of respondents not able to answer the question and hence resulting in a more modest 44% stating that journey time predictability is poor. Views held by businesses across different sectors and size are consistent.

Chart 5.2: Perceived predictability of journey times crossing the Thames at Silvertown/Blackwall



5.1.5 The frequency with which businesses experience the effect of unplanned incidents causing delay vary widely, with 56% noting a problem at least once a week (and 15% everyday). Conversely 13% experience such delays less than once a month and a further 16% never. There is consistency of experience across sector and location.

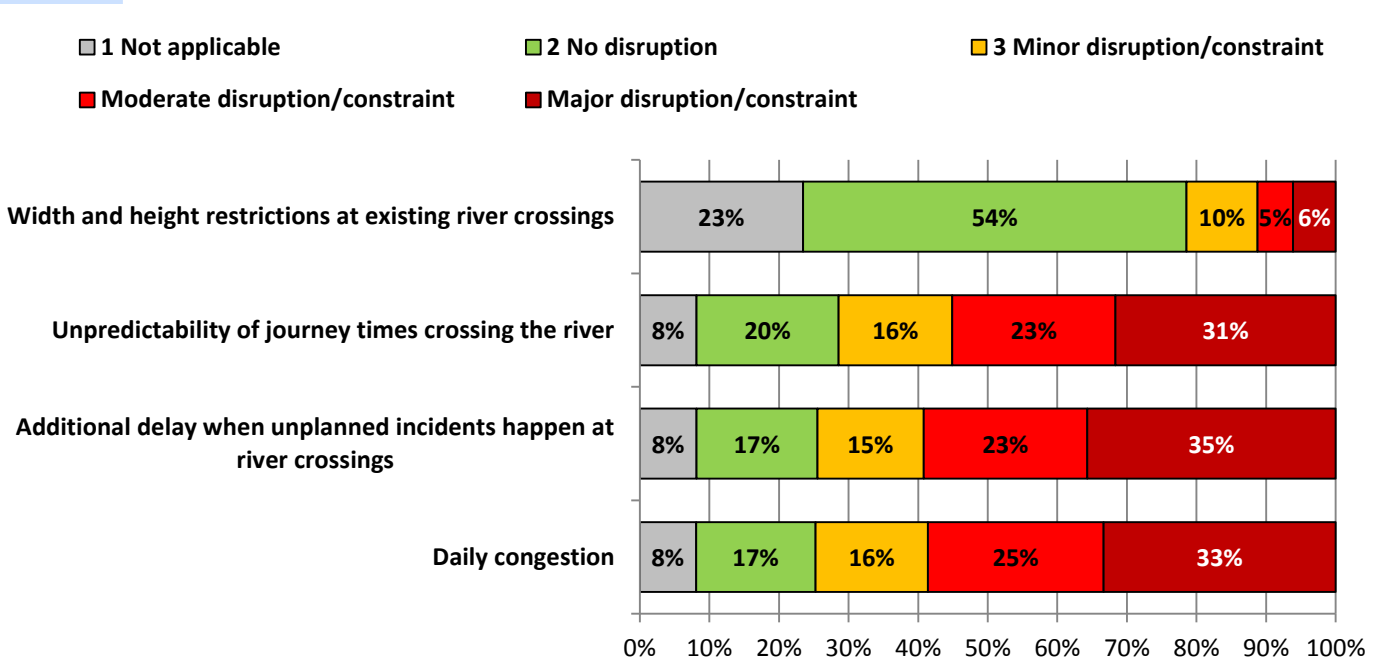
5.1.6 Amongst the 398 firms that experience major and moderate disruption, the main consequences are:

- Late for meetings/appointments (41%)
- Limits number of customers that use the business / unhappy customers (37%)
- Additional time and associated costs to plan deliveries to avoid congestion (32%)
- Deliveries often need to take longer routes to avoid congestion (34%)
- Missed time critical deliveries that have let down clients or affected future business opportunities (33%)
- Allow longer to travel to meetings/appointments (25%)
- Need additional staff and vehicles because of time lost to delays (11%)
- Will only cross the river at certain times of the day (13%)
- Staff are late/ lost staff time (6%)

5.2 CROSS-RIVER ISSUES IN SILVERTOWN / BLACKWALL AREA

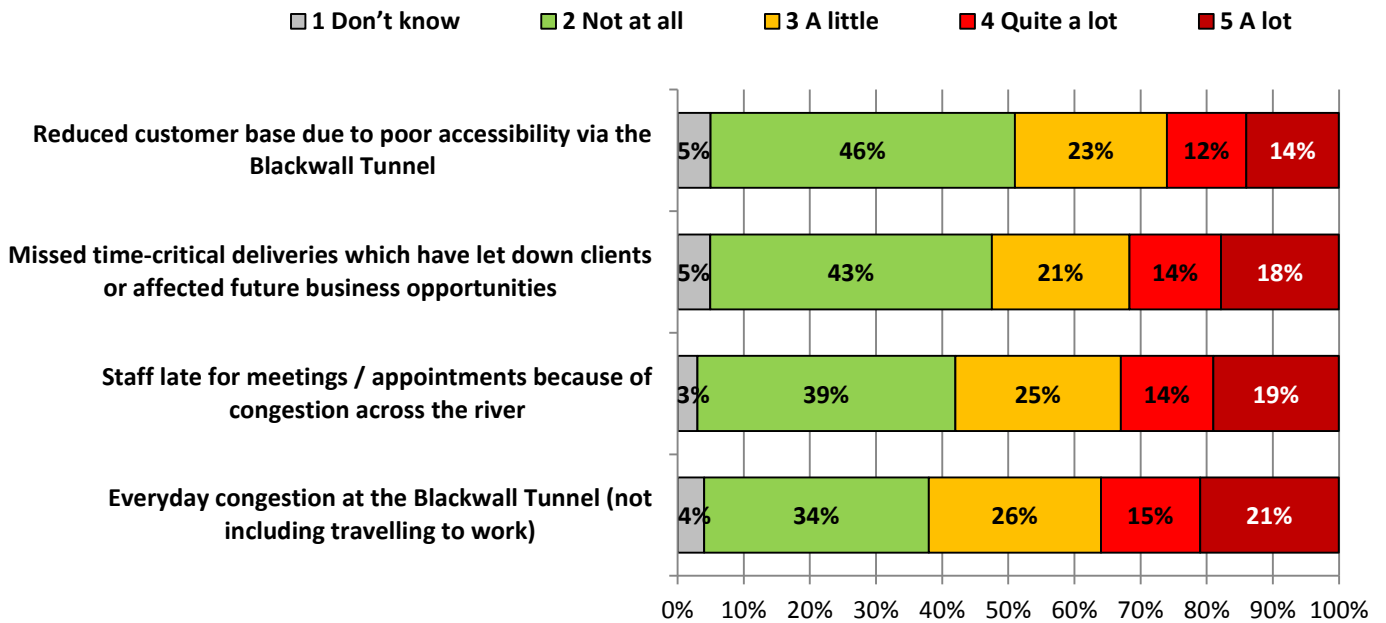
- 5.2.1 Respondents were asked to what extent cross river access at Silvertown / Blackwall impacts on their business, as shown in Chart 5.3.
- 5.2.2 Width and height restrictions do not cause a problem for the majority of businesses, although it is still an issue for 22%. However, significant disruption is caused by unpredictable journey times, delays due to unplanned incidents, and daily congestion (around 70% disrupted, and c.30% significantly so).
- 5.2.3 Tower Hamlets suffers in particular with major disruption caused by congestion (45%), as do manufacturing businesses (42%). Bexley is more prone to delay due to unplanned incidents (43% major disruption); while unpredictable journey times is felt equally across sector and location.

Chart 5.3 Cross river access at Blackwall Tunnel - base all (501)



- 5.2.4 Everyday congestion at the Blackwall Tunnel affects the profitability of just over a third of businesses (36%), with 21% being affected a lot (Chart 5.4). This is particularly noticed in Tower Hamlets where 31% are affected a lot, as are 37% of construction companies.
- 5.2.5 This congestion has an impact on the profitability of c.30% of companies where staff being late for meetings, where time critical deliveries had been missed, or where future business opportunities have been lost. In addition, around a quarter of businesses (26%) feel that poor accessibility via the Blackwall Tunnel has reduced their customer base, a problem felt more strongly in Tower Hamlets (29%), Newham (31%) and the TRAD sector (36%).

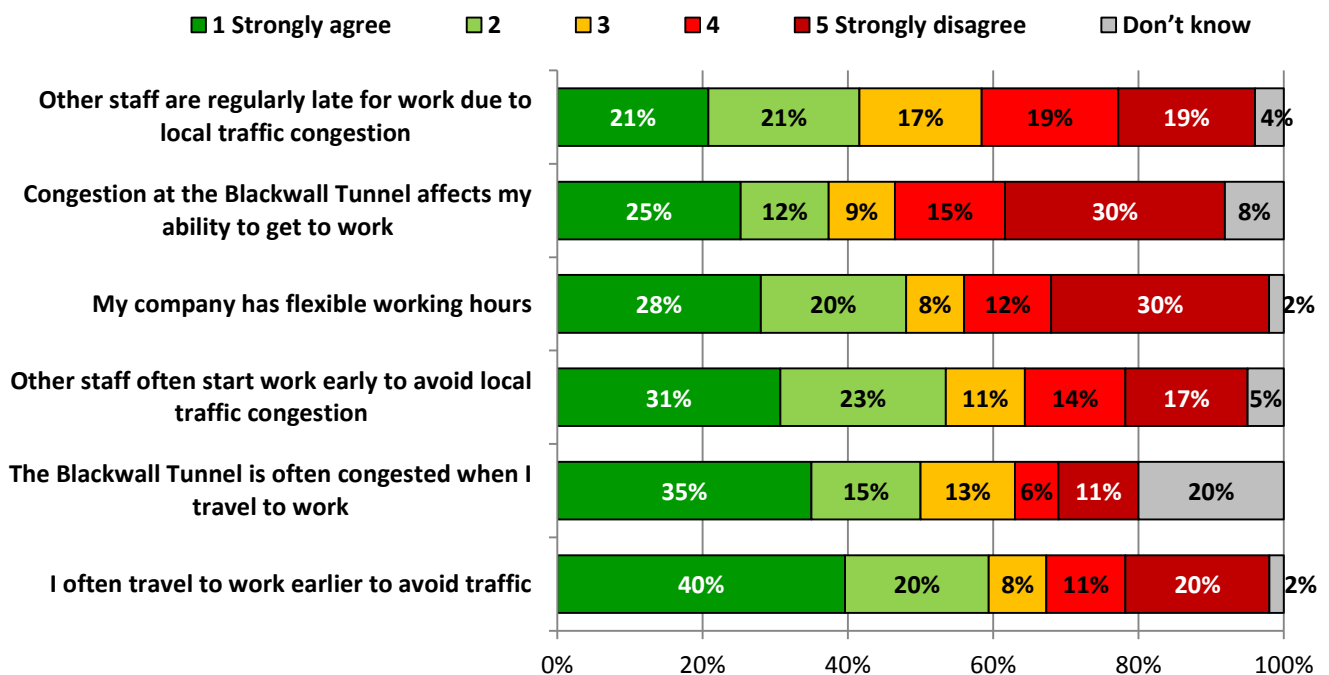
Chart 5.4: How much do the following factors adversely affect your business’s profitability during a typical month? Base all (501)



5.3 STAFFING ISSUES

5.3.1 While some staffing issues have already been raised in response to the consequences of unpredictable journey times in East London, several attitudinal questions were specifically directed to this issue in order to gain more detailed insight and some data upon which to quantify this impact; with a summary presented in Chart 5.5.

Chart 5.5: Attitudes towards working arrangements – Base = all (501)



- 5.3.2 Flexible working operates in nearly half of businesses (48%), while others start early even if this is not a flexible option to avoid the worst of the congestion. Six in ten of those interviewed travel to work early to avoid traffic and note that a similar number (54%) of their colleagues do likewise.
- 5.3.3 In addition, 42% of businesses note that local congestion causes staff to be late for work regularly, with 40% of those who use the Blackwall Tunnel noting that congestion there affects their own ability to get to work on time. This is particularly a problem for those working in Tower Hamlets who use the Blackwall Tunnel (68%).
- 5.3.4 Amongst those who note that their staff are late due to problems with the Blackwall Tunnel (211), 72% note that this occurs at least once a week, with a further 13% that it occurs less frequently. However, when asked to quantify the cost associated with this, very few were able to do so.
- 5.3.5 37 companies provided an estimate of annual costs due to staff being late for work with a mean value of £26,000pa, although there is significant variability in this, with costs ranging from between £150 and £200,000 per annum. We have explored this issue further with businesses that took part in further depth interviews and these findings are reported in the case studies in Chapter 8.'
- 5.3.6 Around half of businesses are likely to operate cross-river more often if crossings in the Blackwall Tunnel / Silvertown area were made more reliable in terms of consistent journey times, of which 28% to a large extent. This opinion is consistent across boroughs and sector, with those who are anticipate growth in their business turnover most likely to be using the crossing more to a large extent (35%).

6 KEY FINDINGS – SILVERTOWN TUNNEL

Key Findings

Current river crossing options are not adequate

There is strong consensus that current crossing options are not adequate (68%). Most businesses feel a new tunnel would increase their customer base (80%) but business opinion is fairly evenly divided on whether the crossing will facilitate recruitment.

The Silvertown Tunnel proposal, including tolling at both Blackwall and Silvertown Tunnels at a similar level to that at the Dartford Crossing, is welcomed by businesses

Half (49%) of all businesses surveyed think the proposal will result in a positive impact for their business. Just 8% thought it would have a negative impact, with the remainder believing it would have no impact on them.

Similarly, 52% of all businesses said they would be happy to pay a toll at both Blackwall and Silvertown Tunnels if it meant that journey times were made more predictable and congestion was reduced, with 30% not willing to do so.

Businesses think that the proposal, including tolling, would lead to the growth of their businesses

37% of all businesses (185) said that it would have a positive impact to allow them to grow their business or invest at their site. Just 4% thought it would have a negative impact. The remainder said it would have little impact.

Of these 185 businesses, 148 (80%) believe it will increase their customer base, with the same proportion noting it will be easier to reach suppliers and 94 (51%) said they would take on more staff.

6.1 LEVELS OF SUPPORT FOR THE SILVERTOWN PROPOSAL

6.1.1 Businesses were provided with an overview of the Silvertown Tunnel as follows:

The Woolwich Ferry is nearing the end of its lifespan and some of the existing tunnels are constrained by height or weight restrictions. The Mayor's Transport Strategy makes a commitment to improving opportunities for road vehicles to cross the River Thames in East London including a new tunnel at Silvertown.

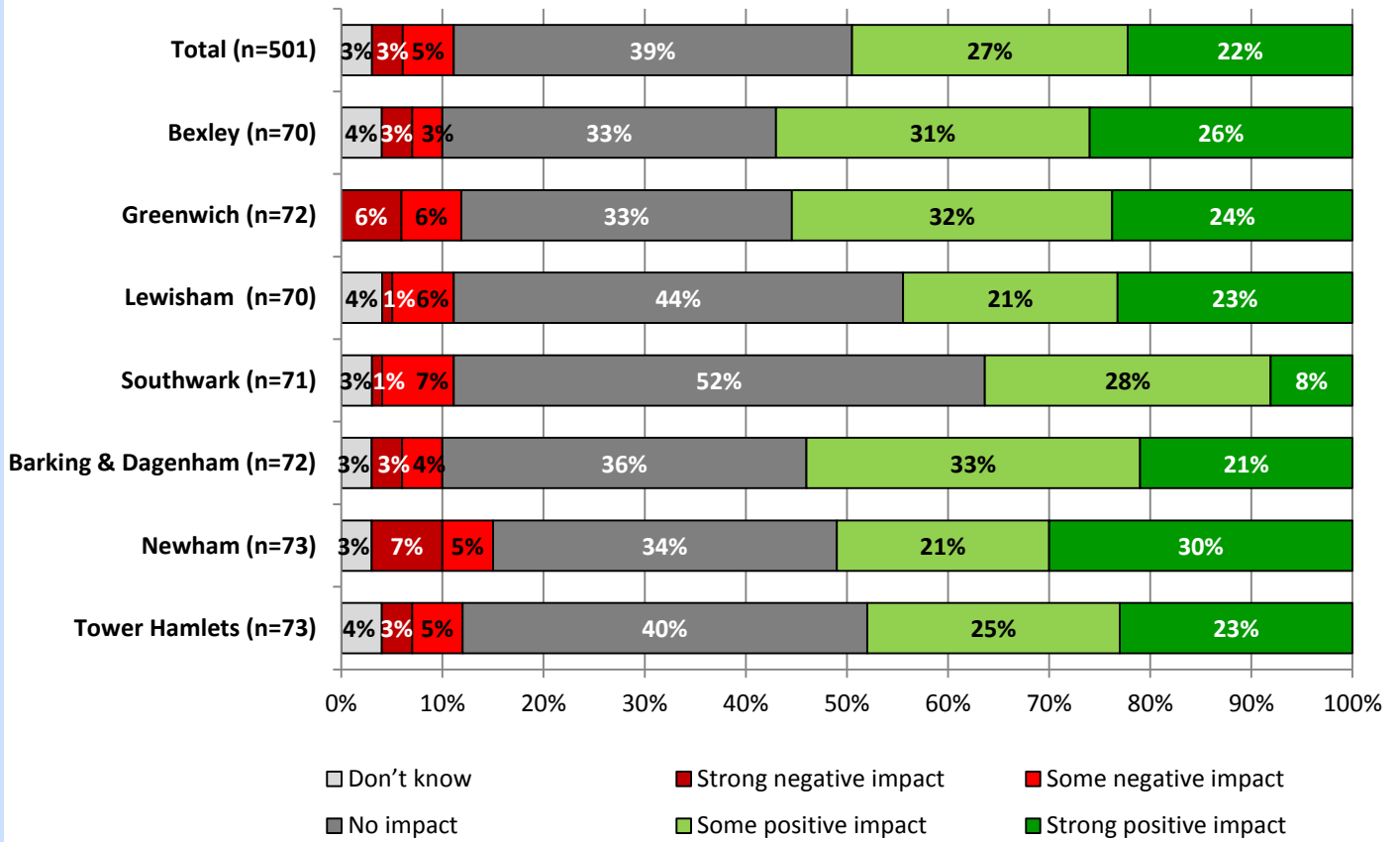
The Silvertown Tunnel;

- Will be a twin-bored 'dual' tunnel,
- Will roughly follow the route of the Emirates Air Line between Greenwich and Silvertown.
- Will provide opportunities for new cross-river bus links, and
- Will provide a new option for crossing the River Thames.

In order to fund the Silvertown Tunnel, some form of charging is expected to be necessary. The charges are likely to be similar to those for the Dartford crossing (which are £2.50 for cars, £3 for two-axle goods vehicles and £6 for HGVs). Charging details and concessions are not yet known, but charging would be 'free flow' rather than using toll booths. Similar arrangements would also be introduced for the Blackwall Tunnel

6.1.2 Findings of overall opinion towards a new Silvertown Tunnel are shown in Chart 6.1

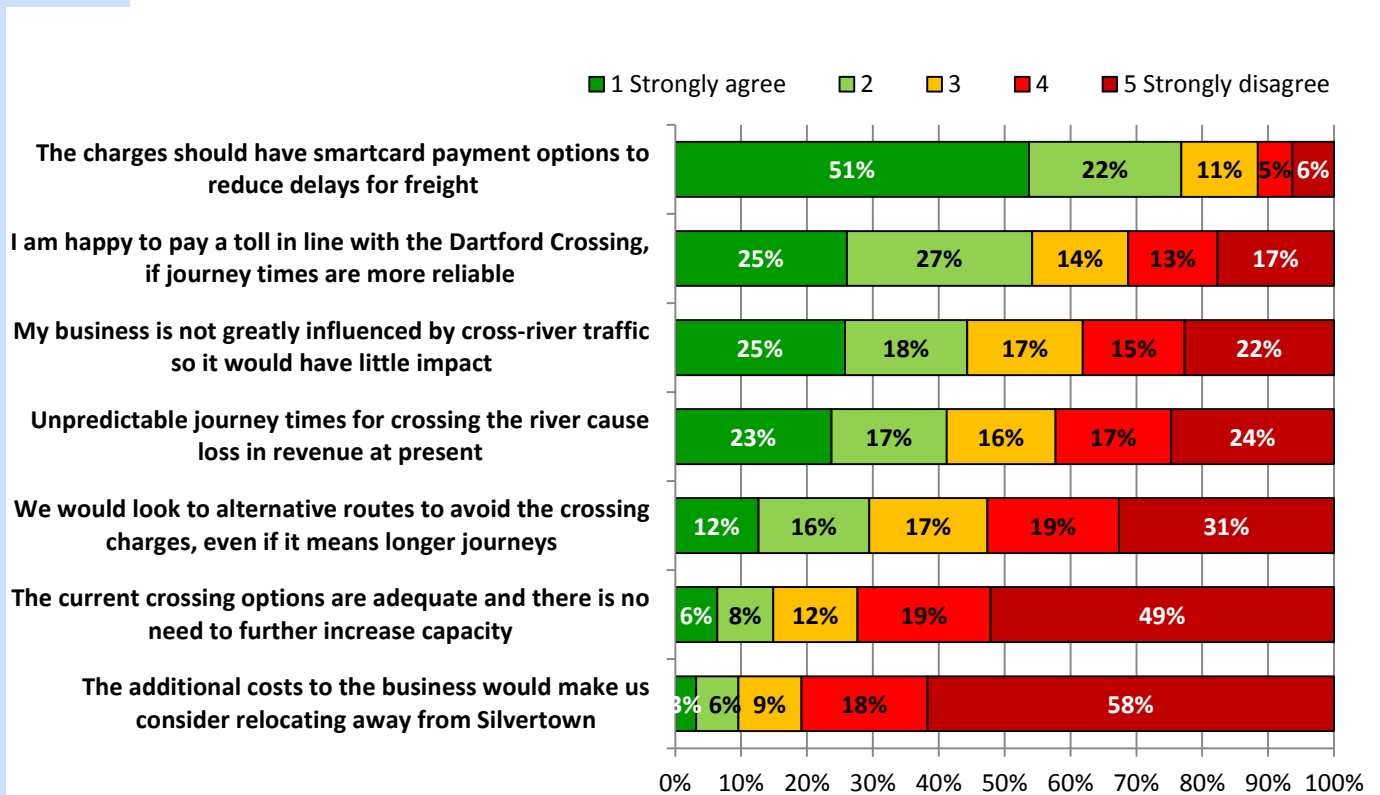
Chart 6.1: Attitudes towards Silvertown Tunnel – by Borough



6.1.3 Overall, half of businesses (49%) feel that a new Silvertown Tunnel with no height restriction will have a positive impact on their business, compared with 44% in 2013. The greatest support is in Newham and within the TRAD sector (30% and 28% strong positive impact respectively); while those in Southwark are less enthusiastic (8% strong positive impact).

6.1.4 In addition, businesses were asked their opinion on a range of statements relating to the Silvertown Tunnel, as follows:

Chart 6.2 Attitudes towards potential impacts of the Silvertown Tunnel



6.1.5 There is strong consensus that current crossing options are not adequate (68%), echoing previous research.

6.1.6 Strongest agreement is for any charges to be made with a smartcard option to reduce delays for frequent users (73%, same as in 2013), with 52% (down from 59% in 2013) willing to pay a charge (similar to Dartford rates) if journey times become more reliable. Opinions are similar across boroughs and business sectors, although larger companies with turnover in excess of £1m are most willing to pay the charge (43% strongly agree).

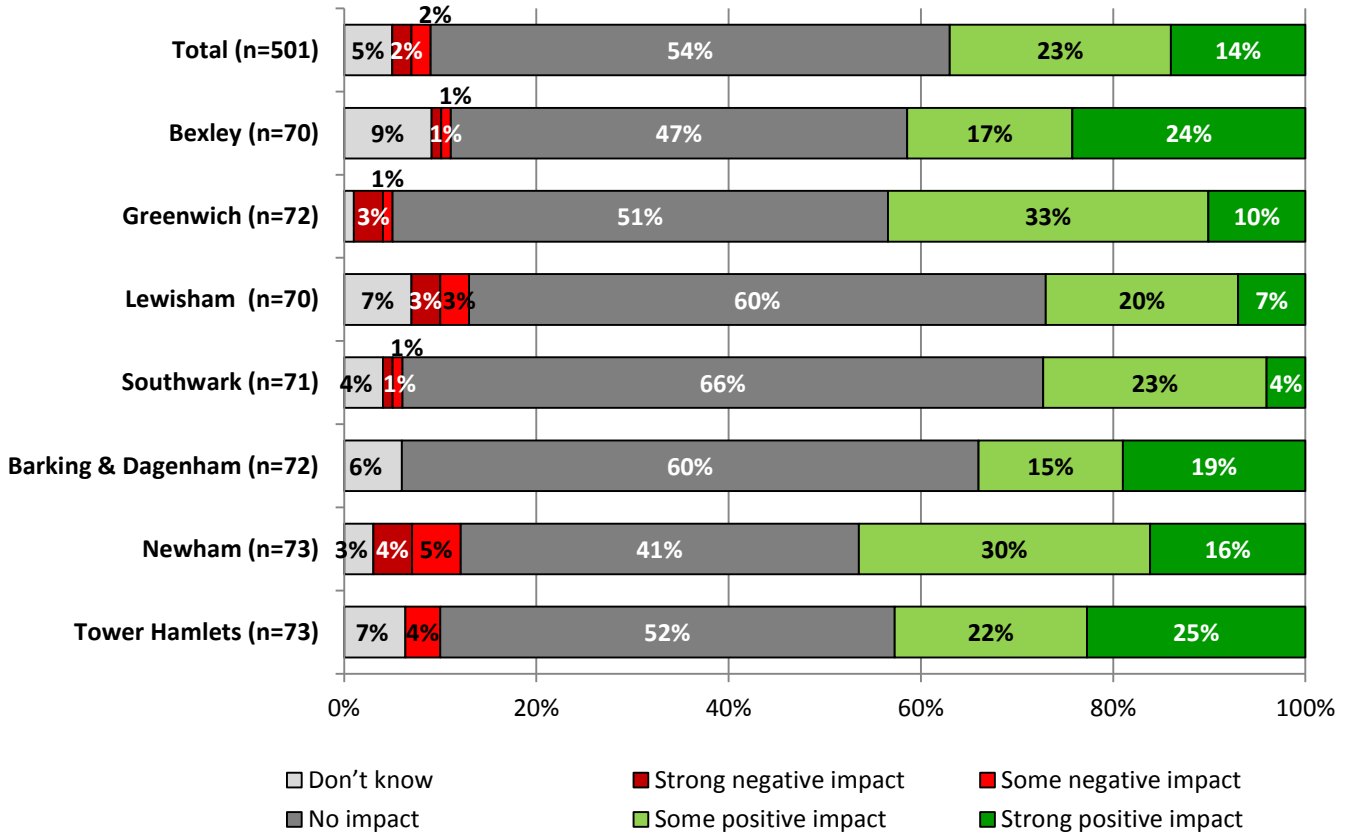
6.1.7 Response was evenly divided over whether they were influenced by cross-river traffic and that unpredictable cross river journey times are causing loss of revenue; with 39% in Bexley strongly agreeing, compared with just 13% in Lewisham.

6.1.8 A minority (18%) would seek an alternative route to avoid paying a charge, down from 34% in 2013. Seeking an alternative free route is most favoured amongst the public service sector (26%) and least amongst TRAD businesses (8%).

6.2 ANTICIPATED BENEFITS FROM THE SILVERTOWN TUNNEL

6.2.1 Overall, 37% believe that the Silvertown Tunnel will have a positive impact on future growth of their business, with just over half (54%) stating it will make no difference, and just 4% with negative feedback. The most positive views are held in Newham (46%) and Greenwich (43%), with least in Southwark and Lewisham (both 27%).

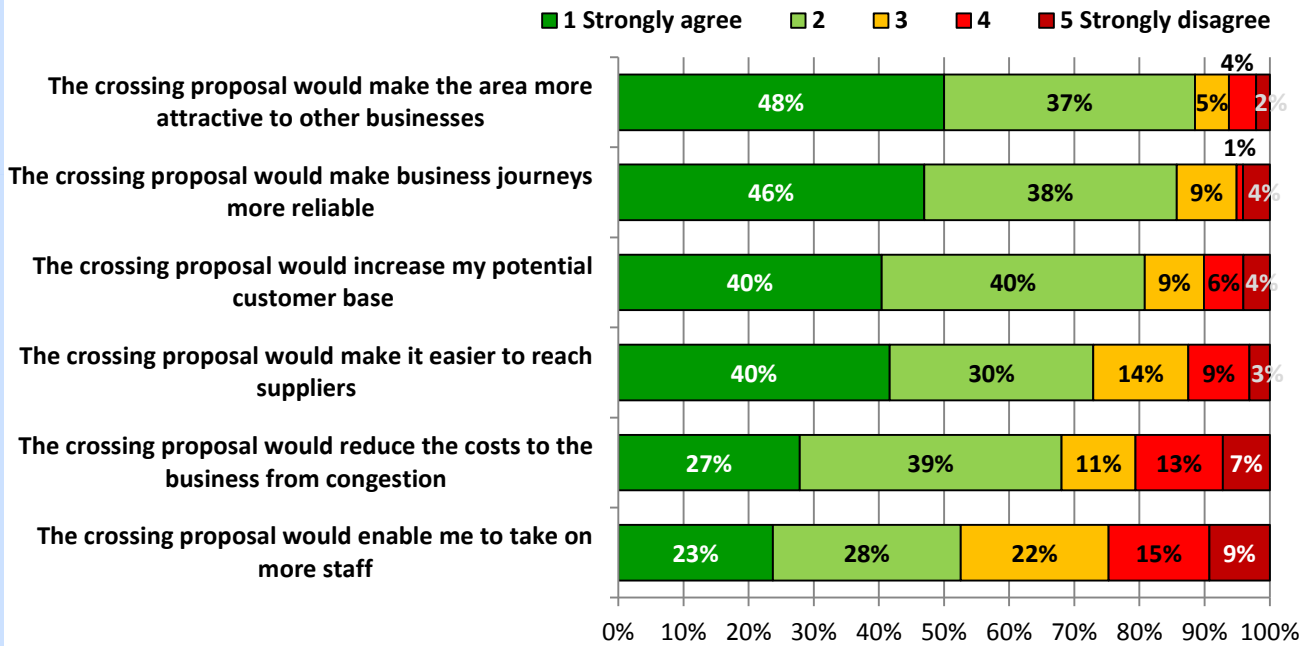
Chart 6.3 Perceived impact of Silvertown Tunnel on business growth – base = all (501)



6.2.2 Amongst those believing the Silvertown Tunnel will have a positive impact on their business (184), 85% believe it will attract more business to the area. There is also agreement that the new tunnel will make journey times more reliable (84%).

6.2.3 Most of these businesses feel the tunnel will increase their customer base (80%), rising to 91% in Newham. Slightly fewer (70%) expect the tunnel to make it easier to reach suppliers, with those in Barking & Dagenham (84%) and Newham (79%) more optimistic. Two thirds think that the new crossing will reduce congestion costs to business, with 20% sceptical. These findings are consistent with those in 2013, where 83% anticipated an improving local economy and providing more predictable journey times (78%).

Chart 6.4: Attitudes toward the benefits from the Silvertown Tunnel – Base: all thinking the tunnel will have a positive impact (177)



6.2.4 Just over half of businesses think that the crossing will facilitate recruitment, with 51% agreeing that it would enable them to take on more staff and 24% disagreeing with this statement. Those most optimistic about recruiting new staff after the tunnel opens are more likely to already employ 50 or more staff (c. 67%) and are already expecting their turnover to increase next year (63%).

7 CASE STUDIES

7.1 CASE STUDY – PROTSHEET ENGINEERING

Protosheet Engineering is an established sheet metal engineering company in Bexley for the last 27 years with a turnover of £1-5m. They have a workforce of 30 staff, of which 6 are managerial, 18 skilled and the remaining 6 unskilled. Three of these staff have been recruited in the past year, with one living the other side of the river. They find it difficult to recruit skilled engineers as this skill set is 'going out of fashion'. They expect future growth to remain similar to now, with the main concerns being traffic congestion and increased cost of rent.

The main benefits of their location are close proximity to customers, suppliers and other similar businesses; with good accessibility by road (when not congested!) and all other modes. They also have their own parking on site. All these attributes are important to the success of the business.

Ease of access to customers/markets is very important to the business. Congestion is the only drawback to their current premises, with access to all parts of London and the M25 of importance.

"We are thirteen miles from London and offer site fittings and site delivery to London on a frequent basis. Thirteen miles in an hour would be great but it could easily take 3 or 4 hours due to sheer amount of traffic using the A2. Yesterday the M25 was blocked at the Dartford Tunnel for half the day and it snarls up all the traffic and effects deliveries. Recently one of our guys said he would be back in half an hour at 3pm, I left at 6pm and he still wasn't back"

They receive around 11-25 deliveries a week from Greater London (outside the sample boroughs) and the South East; with deliveries worth less than 5% of their turnover. Local access, crossing the river, and congestion are significant problems for deliveries.

"I know there are times we have tried to deliver to site and have given up. It's not economical to sit in a traffic jam. Especially in London when everyone knows all the other routes to try. If there's a jam, there's a jam and that's that. I think most people just accept it, as people in this area know. If I phone someone up and say the tunnel is blocked, has been for 5 hours, I can't get to you, most people are agreeable but if they don't want to use us in the future then that's their prerogative."

Around 5-10 business trips are made each day, with three quarters of these by van and the remainder by car. The Dartford crossing and Blackwall Tunnel are the most important crossings for these trips. Blackwall / Silvertown area has particularly unpredictable journey times crossing the Thames, with delays experienced every day and has a major impact on the business. These include additional time and cost to plan deliveries as best they can to minimise congestion delays, using more vehicles and staff, and missing critical delivery times.

"I would imagine you could easily say between 2 and 5 hours a week [are lost due to congestion], at £50.00 an hour [£100-250 per week]. Yesterday we had 2 guys sat on the motorway due to an accident that had happened earlier on in the day. Once that accident had cleared someone flipped their car causing more jams. I drove from Yorkshire and didn't come across one jam! I visited family for 3hrs yesterday as I knew there was a jam on the M25."

Staff allow extra time for meetings but even so are sometimes caught out and are late for appointments. Flexible working is used to try and minimise wasted time in congestion, but staff are faced with longer travel times to try and arrive on time.

"I drive over the A2 every day to and from work. For the last 9 months at least 6 or 7 times a week it is blocked either on the way in or way home. The guys prefer to start at 7am rather than 8am so they can get through the traffic easier."

The number of trips across the river will remain the same regardless of improved crossing options as they are fundamental to the business. The promise of the Silvertown Tunnel brings optimism, anticipating that it will have a strong positive impact on the future growth of the business but maintaining the same level of workforce. Attitudes towards a charge for the new tunnel are ambivalent; however there is some scepticism, especially if Blackwall will also levy a charge

“Possibly [the benefits will make the charges worthwhile]. Sounds like a cash-cow for the Government for the future. It would benefit the Government. Don’t see the need [for a charge on Blackwall Tunnel as well]. But I suppose it has to be on both tunnels otherwise everyone will keep using the Blackwall. It should only be used for the payment of the tunnel. [The charge] has to be like London’s congestion charging otherwise there will just be a continuous build-up of traffic.”

7.2 CASE STUDY – MOT AND MECHANICS

This long and well-established MOT and mechanics company has been based in Lewisham for 25 years. The company has one member of staff (the manager) and has a turnover of up to £50,000. The business operates from a single site in Lewisham, and has not attempted to recruit staff in the last 12 months. It is expected that staff levels will remain the same, and turnover will also remain at its current level due to there being ‘only one pair of hands’.

A major advantage of the current business location is the ease of access by rail and Docklands Light Railway, while no major weaknesses have been identified.

Central London and Essex are considered to be the most important locations to which the business requires access. However, access to Central London is considered to be very difficult, and journey times are considered to be unreliable. Ease of access for clients and customers is considered to be very important to the company. Where delays occur (particularly at the Blackwall Tunnel) these have a considerable effect on business planning – it was reported that such delays happened approximately once a week.

“When there is congestion and I have people coming from that area, they are booked in for a certain time and when they can’t get here it puts me all behind... It’s purely when people have to get to me for a given time for an MOT as I have to do them in hourly slots otherwise I’d have a queue out the door.”

The site receives between 11-25 deliveries per week, with the principal suppliers being located in South East England, outside of London. Less than £1,000 a year is spent on the movement of goods to and from the site, approximating 11-24% of turnover. Between 1-10 staff business trips depart from the site per week.

Journey times across the River Thames at Silvertown are considered to be very poor and unpredictable. However, business at the site is affected by unplanned traffic incidents at the Blackwall Tunnel less than once a month. The consequences to the business include the need for additional time and associated costs to plan deliveries to avoid congestion, and the need for deliveries to take longer routes to avoid congestion.

The Blackwall Tunnel is also felt to have a considerable impact on the business profitability, through everyday congestion, unpredictable incidents, missed critical time deliveries, and through a reduced customer base. While it is expected that the Silvertown Tunnel would not impact on the business directly, it is hoped that it would draw some traffic away from the Blackwall Tunnel.

If toll charges were introduced to the Silvertown Tunnel and Blackwall Tunnel, alternative routes would be sought to avoid these, even if this meant longer journeys and a greater distance travelled. Furthermore, the type of toll charging system used is considered to be an issue to the company.

“If it’s like the Dartford Tunnel and you have to queue and pay. If I didn’t realise I was going to go that way and then end up having to queue and pay it’s a nightmare.”

7.3 CASE STUDY – BEAUTIFUL BATHROOMS

Beautiful Bathrooms is an established seller and installer of bathrooms. They have been based in Bexley for the last 7 years and have a turnover of £100-500k. They have a workforce of five, of which all are considered to be at a managerial level and one of which was recruited in the past year. They reported that they are not currently recruiting and do not have any particular issues when it comes to recruiting in their current business location.

With regards to business growth they consider business rates and parking restrictions to be possible barriers to achieving their growth targets. They also consider increased levels of traffic to be an issue and that ease of access from the site to customers, clients or markets is a significant problem.

“Since our business opened there has been increased traffic and parking restrictions locally meaning the passing trade isn’t able to stop and visit us. That is a problem. When we first moved here the location was strength and the area was vibrant for the trade we are involved in. Welling has suffered in the past 20-30 years as more and more restrictions have come in preventing people parking nearby and coming to our shops.”

They consider a particular weakness of their business location to be local congestion / time wasted in local traffic and the difficulty of transport / haulage and that some of this can be attributed to the existing crossing. The company requires access to Greenwich, Charlton, Woolwich, Bexley, Erith and Thamesmead (very important for the business to access these locations), but state that is very difficult to reach these locations with regards to time taken to cross the river.

“Our suppliers complain about journey times in the local area (Welling). We find delivering outwards to east, central or north London that journey times are unpredictable at best and horrible at worst. An additional river crossing could help to improve that and give us an alternative and less congested route. Journey times into work for staff can be unpredictable...our delivery drivers and customers complain about the traffic...We have a lot of feedback saying local traffic is bad. ...It is affected by the Blackwall Tunnel crossing. If the tunnel is congested the traffic backs up onto the local roads.”

However, they are unsure of the benefits that an additional crossing could bring:

“I think it would help in terms of transportation in and out and would make the area busier and better connected. There might be problems that come with it.”

Around 26-50 business trips are made each week, split equally between car and van trips. The Blackwall Tunnel is the most important crossing for these trips.

Blackwall / Silvertown area has particularly unpredictable journey times crossing the Thames, with delays experienced three to six times per week. These include additional time and cost to plan deliveries as best they can to minimise congestion delays, and missing critical delivery times. This is mirrored with staff being late for work due to congestion at the Blackwall Tunnel three to six times per week.

A new tunnel is considered to bring positives effects for the company.

“By improving access and through traffic in the surrounding area I’m sure it will help. Staff retention would be better if morale was better. Everything depends somehow on how easy it is for us to carry out our business and a big part of that is dependent upon how well the traffic flows.”

There is some concern over having to pay a charge to utilise the new system:

“We’re being asked to pay for something that we’ll benefit from when other people receive benefits from other projects without having to pay directly. I can’t see why the funding for this project can’t be taken from taxation the same as other projects are taken from taxation.”

7.4 CASE STUDY – REDWOOD ESTATES LIMITED

Redwood Estates Limited are an estate management company which have been based in the London Borough of Greenwich for 10 years. The company has a turnover of between £500,001 and £1million, with 12 staff based in their Greenwich site (all unskilled). The business also operates from other sites located elsewhere in Greater London. The company is currently looking for premises to the south side of the River Thames, rather than being a relocation, this is a new office facility to complement the existing facilities.

In the last 12 months the company has attempted to recruit staff to this location, with a resulting increase in the number of staff at the site by four people. At least one of these staff live on the other side of the River Thames. It is expected that the staff levels will increase by more than 25% in the next 12 months. While Redwood Estates have no difficulty in recruiting staff to the site, the River Thames is a barrier to possible areas of recruitment.

"I certainly can't and don't recruit anyone from the north side of the river. I have done that before and staff have had to leave due to the time it take to get through the tunnel or the ferry. It does restrict me and it would be nice to be able to recruit people from both sides."

The volume of business in the local area is described as a major benefit of the location, although the river currently restricts the business to operating south of the River Thames.

"All of our business is kept to this side of the river. I would like to do more business over that way but getting across is a headache and can take an hour or more each way just to get across without any traffic problems. I don't have the time at the moment to get over there."

The river is identified to be a barrier, not only to where the business can operate, but also to the potential growth of the business, with the difficulties in crossing the River Thames specifically preventing business expansion to the north of the Thames, even while the business expands on the south side of the River Thames.

"I would have expanded a long time ago but I don't have the time to spend going through the tunnel or on a ferry every day."

The company does not receive deliveries to the site, although access is important to other parts of Greenwich, Bexley and Woolwich. Furthermore, access to other parts of East London north of the river is also identified as being important to the business. The Blackwall Tunnel is specifically identified as a barrier to be avoided.

"I try and avoid the Blackwall Tunnel at all costs. I've lived on the south side for 15 years and it has got worse and worse. The Blackwall Tunnel is the biggest problem of living and working here."

Ease of access for clients and customers, and ease of access to markets are considered to be very important to the company. Between 101 and 500 staff business trips are made per week from the site, all of which are made by car. The Blackwall Tunnel is by far the most important crossing of the River Thames for the business, and it has a major impact when there are incidents or congestion. Journey times across the river are also unpredictable, which has a major impact on business. Unfortunately for Redwood Estates, these incidents appear to be commonplace.

"You'd be surprised at the number of cars who break down in the tunnel. It's a weekly occurrence."

The consequences of the disruption mean that staff allow extra time for travel to meetings but even so are sometimes caught out and are late for appointments.

"Whenever we have to go across the other side we do not know if there will be a problem. You have to put out 3hrs of your time just to get there and back."

Redwood Estates currently employ a company to undertake property viewings on the other side of the river, which costs the company money - around a couple of thousand pounds per year. Should a new crossing be provided, the impact on Redwood Estates would be '*instant*' and would assist the company both in terms of recruitment and have a major positive impact on the development of the business.

"I'd be recruiting from the other side of the river, we'd be going backwards and forwards all the time if there was another tunnel. It would change my business enormously."

However, a note of caution from the company is that access to the tunnel is a concern, with queuing traffic on the A2 mentioned specifically. There appears to be fear that should the Silvertown Tunnel open, there could be gridlock in the area. The Silvertown crossing is considered needed, but the other two proposed Thames crossings at Gallions Reach and Belvedere are also considered necessary, due to the amount of construction in the area. The proposed tunnel toll charges are considered to be '*worth every penny*' for delivering the Silvertown Tunnel.

7.5 CASE STUDY – VEHICLE MAINTENANCE COMPANY

The vehicle maintenance company maintains and services vehicles for a large organisation. The company is within the services sector, and neither sells nor produces physical goods. The business is long-established, having been based in the London Borough of Bexley for the last 20 years. The company also operates from other premises across the UK.

There are 50 staff working at the Bexley site, of which all are skilled professionals with the exception of one manager. In the last year, the number of staff working at the site has increase by between 26-50%. In the last 12 months the company has attempted further recruitment of staff to the Bexley site, and 10 staff have been taken on during this period. Of these staff 26-50% have been from the other side of the River Thames (north of the river).

"It is easier to recruit from North and North West London as staffing levels are good round there but we can only recruit South East London area and North West Kent as people want to travel up into London but not against the traffic."

In terms of filling vacancies, it is acknowledged that none of the jobs at the site are easy to fill, and recruitment is difficult. A major issue being that there are not enough staff available with the specialist skills required for the work. Despite difficulties with recruitment the company still expect that staff levels will increase further by up to 25%, which they predict will improve the company's profit margins and increase turnover by up to 25%, from its current level of between £500,001 and £1 million.

The current business location in Bexley is considered to have several major benefits, including ease of access by road, bus, rail and Docklands Light Railway, on foot and by bicycle. Ease of transport and haulage is also considered to be a big benefit, as is proximity to the East London River Crossings, and ease of access by staff.

However, local congestion is considered to be a major weakness of the site, with the associated time wasted while spent in traffic. As such, it appears that the major accessibility benefits can be restricted by congestion in the local area.

Access to Central London, Canary Wharf, the Royal Docks, the M25, Stratford are considered very important to the business, as is access to Essex, and other areas of East London both north and south of the river. In terms of time taken to cross the river, none of these locations are considered very difficult to access, although reaching the M25 and other parts of East London south of the River Thames, is not considered easy. In terms of journey time, reaching other parts of East London south of the river is not considered reliable.

"Two or three times a week you can be sitting in traffic, up to 4hrs sometimes. Then there is the knock-on effect of traffic in local areas."

The company receives around 200 inbound deliveries to the site each week, indicating a heavy traffic flow. The principal suppliers to the site are located around the world. The organisation spends between £5,001 and £10,000 on the movement of goods into and out of the site – comprising approximately 11-24% of turnover. Between 11 and 25 staff business trips are made from the site, all of which are by car. Congestion is identified to be a major problem in terms of receiving deliveries to the site.

“When vehicles get booked in they tend to forget that there is a river in the middle. When I collect a vehicle from a customer as the crow flies you’re looking at a 5-6mile journey but because of a lack of river crossings you are looking at a 2-4hr journey and tunnel fees.”

In terms of crossing the River Thames, Tower Bridge, the Blackwall Tunnel and the Dartford Crossing are considered to be the most important access routes, of which the Blackwall Tunnel is the most important. The Thames is identified as a barrier to the development of the business, with journey time predictability classed as very poor. Unplanned traffic incidents at the Blackwall Tunnel causing delays, occurs every day, with daily congestion having a major impact on the business.

“We used to have a supplier north of the river, but there was no guarantee we would get the parts in time so we couldn’t get the vehicle back to the customer in time and they would complain so that’s why we deal with customers south of the river.”

It is felt that the business would operate cross-river more often to a large extent, if journey times across the Thames in the Blackwall / Silvertown area were made more consistent and reliable. If a Silvertown Tunnel was to open, it was considered that this would create a new linkage.

“Work would still get generated locally, but it would open up a corridor for customers north of the river to get their vehicles booked into a workshop south of the river. It would give them more choice.”

Staff at the company will plan their journeys at certain times of the day and allow longer to travel to appointments. However, despite these efforts, staff can still be late for meetings and appointments.

“I can lose a technician for up to 2.5hrs just from sitting in traffic.”

“This week, a member of staff went to pick up a truck from Dartford next to the bridge and it took him 2.5hrs round trip to go 2 miles.”

A cost to the business is the need to pay staff for overtime due to using longer routes and journeys due to the congestion. Furthermore, unpredictable journey times for crossing the river cause a loss in revenues, and there is strong disagreement that the current crossings are adequate. Potentially a member of staff can be unavailable for seven hours due to congestion, at an hourly rate of £74, this can mean a potential loss of £518 on one member of staff.

“This week, a member of staff went to pick up a truck from Dartford next to the bridge and it took him 2.5hrs round trip to go 2 miles... Hourly rate of £74.00 an hour, you’ve lost him and the work that was allocated to him. He has to come in and carry that work out and dropping the job off at the end of the day. Looking at potentially 7hrs.”

The proposed user charge for the tunnel would encourage the company to seek alternative routes, though this would not cause the company to look at relocating away from Silvertown. However, the response to potential introduction of a user charge is negative.

“You are adding extra cost to the business and how will we offset the cost to the customer? If you put a toll charge on all the crossings then we’ll have to put up our hourly rate and we’ll be pushing the customers further afield. You’re just moving the congestion somewhere else. People don’t want to pay a toll charge. The Dartford toll should be free of charge of by now but it’s been taken over by a private sector and toll charges are through the roof. How do you offset that to your customer? You can’t. People don’t want to pay tolls. It’s all revenue that you’ll never get back in. Potentially you could end up running at a loss.”

7.6 CASE STUDY – 2000 TEST EQUIPMENT

2000 Test Equipment is an electrical tool equipment distributor who has been based in Bexley for the last 6 years. They have a turnover of £100-500k. They have a workforce of five, all of which are considered to be at a managerial level and one of which was recruited in the past year. They reported that they are not currently recruiting and do not have any particular issues when it comes to recruiting in their current business location.

Their biggest current barrier to growing their business is affordability of new, larger premises. Furthermore, their business is located in a non-trading estate / high street location. They do not get pass-by trade.

The company requires access to Greenwich, Charlton, Woolwich, Bexley, Erith and Thamesmead, but state that it is very difficult to reach these locations with regards to time taken to cross the river. They do not believe that a new river crossing will impact their business.

Around 11-25 business trips are made each week, entirely undertaken by car. The Blackwall Tunnel and the Woolwich Ferry are the most important crossings for these trips. The company does not consider current capacity of the East London River Crossings to be a barrier to business development and state that they are never affected by an unplanned incident that delays traffic at the Blackwall Tunnel.

As a company they do not feel that any benefits that are derived from a new crossing would make the proposed charges worthwhile.

7.7 CASE STUDY – A MAJOR FOOD RETAILER

This major food retailer is based in Lewisham, and has been established in its current location for 30 years. The company operates from stores across the UK, and the Lewisham site has an annual turnover of between £1 million and £5 million per year.

The business employs 19 staff, though this follows a decrease of up to 25% over the previous year. Of these staff, approximately a quarter work at the managerial level, while three quarters working in the store are unskilled. In the last 12 months, the company has attempted to recruit staff to work in the store, with two members of staff joining in the previous 12 months. Over the next 12 months, it is not known how many new staff will join the company, though turnover is expected to increase by more than 25%. A lot of changes are being made in the business through expansion and streamlining, and through improving distribution.

None of the staff have been recruited from the other side of the river (north) and it is noted that there is difficulty with staff recruitment, especially for management vacancies. Customer service members are a comparatively easy vacancy to fill. Part of this problem has been blamed on poor quality of applicants, though the area of recruitment is also an issue.

“It is better to recruit from not too far away from where your business is due to transport implications. In winter when it is snowing you have to think about all that and the problems staff may have trying to get into store. It is ok if your staff have cars, but the majority of them depend upon public transport.”

“I only have one member of staff who comes from east London...I think sometimes there is trouble when there are delays etc.”

Major benefits of the current retail site include proximity to customers and suppliers, ease of access by road, bus, rail and DLR. Major weaknesses include time wasted in traffic due to local congestion and difficulties with transport and haulage. Approximately 12 inbound deliveries are made to the site each week, and the ease of receiving supplies has caused problems at this site. This is a very important issue for the retailer, especially for customers.

In terms of implications *“Not having available stock for our customers – empty shelves. We are not satisfying our customer’s needs. Customers are not happy to come in to purchase something and it is not in the store... I don’t want to lose my customers to Tesco or whatever. When there are issues with stock not being available customers will start looking around. It’s very easy to lose customers.”*

Between 11-25 business trips are made from the site each week, all of which are made by car.

In terms of crossing the River Thames, the Woolwich Ferry is the most important crossing, and incidents at the Blackwall Tunnel do not appear to cause problems for the retailer.

“My warehouse is in West Thurrock so all my deliveries do not come through the Blackwall Tunnel. If I have a regional meeting I will use the Blackwall Tunnel so will have to leave early but not for deliveries.”

However, despite this, additional delays due to unplanned incidents cause major problems – such issues have resulted in missed time-critical deliveries which have affected future business opportunities and had a major impact on monthly business profitability.

“My deliveries come from Dartford so when there are problems in Dartford or on the M25 sometimes deliveries are late or held up until the following day... Maybe once a week, deliveries are held up for 1-2hrs.”

The retailer offers flexible working hours, and staff often travel to work earlier to avoid traffic. Furthermore, deliveries to the store are planned to avoid traffic.

“We use trucks to bring deliveries into the store, there are issues with packing as there are only certain times we can accept deliveries due to traffic flow. We try to get deliveries first thing in the morning or late in the afternoon.”

“I have 2 schools around me so between 8.30am-9.30am it is difficult as there is a high volume of traffic, and again at 3pm when the schools finish. Deliveries are timed to avoid these difficult times.”

It is not expected that a new crossing of the River Thames at Silvertown would make any difference to whether the business operated more across the river – though it is strongly felt that crossings of the river are not adequate in their current condition. The crossing may lead to a small positive impact in terms of investment and growth of the business, and it is felt that a new crossing would enable the retailer to take on more staff.

7.8 CASE STUDY – WINKWORTH PLC

Winkworth PLC is a UK-based estate agency with over 90 offices. One of these offices is located in Southwark, to which this case study refers. The company has been based in Southwark for 21 years and employs a total of four staff at this site. Of these, two are skilled professionals, one is an unskilled member of staff, and the final member of staff is a manager. In the last 12 months, there has been no attempt to recruit staff to join the business in this location. It is expected that in the coming year, the number of staff at the site will remain at its current level.

The main role of Winkworth is the sale and rental of residential properties and the Southwark site has an annual turnover of between £100,001 and £500,000. Winkworth are making efforts to improve the business in the coming year, and as a result of these improvements it is hoped that turnover will increase by a level of up to 25%. In terms of barriers to reaching the target level of growth, competition from other agencies is stated to be the main local issue.

The advantage of the current business location is the number of people passing by, while no weaknesses of the location are mentioned. Access to most other locations in and around London is not at all important to the business, though access to the Isle of Dogs and Canary Wharf is considered to be marginally more

important than the other locations. The business largely focuses its efforts locally, avoiding the need to go through the tunnel.

“We don’t go through the tunnel. We stay on this side of the river concentrating on SE16 and SE1.”

The characteristics of the premises are very important to the running of the business at the site, as is the ease of access to the site by customers, and from the site to markets. In all cases, none of these have caused problems or issues at the site, and the company has no plans to move from its current location in the next 12 months.

Winkworth receive between 1-10 deliveries to the Southwark office each week, reflecting on the nature of the business as not being one involving the dispatch and receipt of goods or materials. No problems relating to the movement of goods are present at the site. In an average year, the Winkworth Southwark office spends less than £1,000 on the haulage and distribution of goods and materials to and from the site. This accounts for less than 5% of turnover.

The business has a considerable number of staff business trips departing from the site per week (between 51 and 100) given that there are only four staff employed at the office. All of these trips are made by car.

All river crossings in East London are considered to be unimportant for the business, with the Rotherhithe Tunnel being marginally more important compared to the other crossings. The capacity of the river crossings do not act as a barrier to the development of the business. However, were the crossings to be made quicker and more reliable, it is expected that this would allow Winkworth to operate on both sides of the river.

“If there was a better crossing of the river where you knew the journey was 15mins at any time it would make a difference to whether I decide to do more business across the other side of the river.”

Journey time predictability for crossing the Thames at Blackwall is considered to be poor, and on average the company is affected by unplanned traffic delays in the area on a less than weekly basis. There are no major impacts on the business resulting from congestion or delays, although some moderate impacts result from unplanned incidents and unpredictable journey times.

“In terms of people getting to the office...if they can’t get to the office or are being delayed it disrupts my business (Estate Agents). Time is set aside for people to visit and if they arrive late or don’t get here at all it is a disruption.”

The main impact of such disruptions on the business is to restrict interactions with customers. Everyday congestion and unplanned incidents at the Blackwall Tunnel do adversely affect business profitability during a typical month, and occasionally result in missed time critical deliveries. The most significant impact on business profitability during a typical month results from staff being late for meetings.

“You have time set aside for a viewing and they are late you end up being late for somebody else etc...”

Unpredictable journey times for crossing the river cause a loss in revenues at present, and there is support for a tunnel toll provided that smartcard payment is offered.

In terms of travel to work, congestion at the Blackwall Tunnel means that staff will often start work early in order to avoid traffic congestion – despite this, staff are regularly late due to local traffic congestion (although at a less than weekly frequency).

If the East London river crossings were improved, the business would be likely to operate across the river more often, to a large extent. However, it is expected that a new Silvertown Tunnel would have some negative impact on the business. Despite this, a strong positive impact is predicted in that a new crossing at Silvertown would lead to further investment in the business at this site.

7.9 CASE STUDY – AC ELECTRONICS

AC Electronics is a retail and TV repair service located in Lewisham. The business is well-established in the area, having been based in the borough for 29 years. The Lewisham site is the only location operated by the company.

AC Electronics currently employs between 1 and 10 staff at its site in Lewisham, approximately half of which are at a managerial level, and half at the skilled professional level. The company has not attempted to recruit staff in the last 12 months, and it is expected that the number of staff will stay at its current level over the next year. If the company were recruiting staff, the river would be a barrier to this to some extent:

“I would never think of employing anybody from the other side of the river. I couldn’t rely on them getting here on time. It wouldn’t be their fault. People wouldn’t come across this side to be employed as they know the difficulty in that journey.”

AC Electronics has an annual turnover of £50,001 - £100,000, and it is hoped that over the next 12 months this will increase by up to 25%. It was recognised that the potential transport improvements could increase the number of customers and be beneficial to the business, which in turn would allow more staff to be employed at AC Electronics.

“If we get more customers because of the transportation it may encourage me to employ more people. You can’t employ people if you don’t have the business, if you have more business you can employ people. If customers can come to me, then I can think of expanding.”

The affordability of the site and the proximity to the owners’ home are considered to be the main advantages of the current business location. The only weakness of the site identified is that a public toilet located outside of the shop now restricts the view of the shop – transport connections are not considered to be a weakness.

The main area to which access is considered to be important to AC Electronics is Greenwich, Charlton and Woolwich. Ease of access by customers and visitors, plus access to clients and markets are both considered to be very important to the business, as is the characteristics of the premises. The business receives between 11-25 deliveries to the site per week, with the principal suppliers being located elsewhere in the South East (outside London), the English Regions, Wales and Scotland. The main problem with the receipt of deliveries to the site is the parking situation. AC Electronics spends less than £1,000 a year on movement of goods and materials to and from the business site, accounting for less than 5% as a proportion of turnover.

None of the East London River Crossings are considered to be particularly important to the business, though the Dartford Crossing is not at all important. However, it is felt that the capacity of the river crossings in East London do act as a barrier to business development.

“People in North London don’t come to South London. I have one rep who lives in the North of London who does the whole of London and South East but his company is based in Portsmouth. Every other one of my reps lives, and their companies based, south of the river. They don’t go across the river.”

Journey times for crossing the River Thames in the Silvertown area are considered to be very poor in terms of predictability, although unplanned incidents at the Blackwall Tunnel never affect the business.

“Yesterday there was a problem with the Blackwall Tunnel; people were stuck on the A2 for three and a half hours. My daughter works in Kent and manages primary schools in North London. She’ll either leave at 6.30am or 9.30am as it’s mayhem trying to get across the river.”

However, the time taken to cross the river is stated to be a considerable barrier to the business operating on the opposite side of the River Thames.

“At the moment, I personally wouldn’t go to East London to collect the job as I just wouldn’t bother with the time aspect involved. It could take me an hour or two there, then an hour or

two back; Four hours transporting one TV - it's pointless, but if it was 25 to 30mins it is feasible."

"If someone in East London phones up for a TV repair, as soon as you mention the Blackwall Tunnel it's pretty much 'I won't bother' as it's so difficult to cross the Blackwall Tunnel...When you're coming that way having an additional opportunity to come across lessens the load on the Blackwall Tunnel, and if all things were equal and the amount of traffic over the Blackwall Tunnel went down by half it would be an easy crossing. East London to South East London would be a matter of 20-25mins which is doable"

It is felt that more reliable crossings of the River Thames would enable the business to operate across the river to some extent, and a new tunnel at Silvertown will have a positive impact on the business, to some extent.

The owner of AC Electronics is happy to pay a toll to cross the River Thames if it resulted in more reliable journey times, and also strongly agrees that the toll charges should have smartcard payment options to reduce delays for freight. However, there was concern at the idea of tolling the river crossings, and the potential effect on wider-businesses.

"It will be detrimental to general business to toll on every road...There will be a greater north/south divide by making people [pay to] cross their own city. It seems wrong."

The idea of tolling for commercial vehicles only was indicated as a possibility, to encourage such vehicles to use the M25.

"All links are good and it should be done, the sooner the better. Charging the public for it I think is wrong. If it's commercial or oversized vehicles they should be charged as they should be forced to go on the Dartford Tunnel route rather than through the city, unless they have to and then they should pay."

7.10 CASE STUDY – BUS OPERATING COMPANY

This bus operating company has been based in the London Borough of Newham for 80 years, making it a well-established business in this location. The bus company also operates from other premises in locations across the UK. The company representative did not wish to have their comments audio recorded, but agreed to notes being taken on the main comments they made.

The bus company employs approximately 850 staff at its site in Newham, and staffing levels at this site have remained constant over the last 12 months, although the company has been attempting to recruit staff during this period. The easiest vacancy to fill has been administrative staff, while the hardest to fill is bus drivers. The bus company reports that it has no particular difficulty recruiting staff to work at this site. In the next year, it is expected that the number of staff working at the business site in Newham will remain at or near its current level. The turnover of the company at this site is not known.

The main benefits of the current location of the business are given as the ease of access by road and by public transport, while the main disadvantage is the local congestion which results in time wasted in traffic – this is a key limitation of the site. During a depth interview it was indicated that traffic congestion prevents the bus operator from achieving its targets, for which there is a financial implication.

The locations listed as being most important for access include Central London, Canary Wharf, the A13 corridor, Stratford, East London (north of the river) and Essex. No access difficulties are present in terms of journey time and reliability for the locations considered important to the bus company.

Working in a transportation environment, it is unsurprising that ease of access for goods, clients and to markets are considered to be very important to the successful running of the business. However, it is noted

that there is a significant problem with the receipt and dispatch of supplies and goods. At this site, the bus company reports that its suppliers are based in Greater London, and right across the UK and Ireland.

The bus company considers that the most important crossing of the River Thames to be the Blackwall Tunnel, followed by the Dartford Crossing. The journey times for crossing the River Thames in the Silvertown/Blackwall area are considered to be very unpredictable. Furthermore, the bus company is affected by unplanned incidents at the tunnel every day, which impacts on the business at the site. In the depth interview, it was reported that the Blackwall Tunnel and A13 are big barriers for the business. It was indicated during the depth interview, that the daily congestion at the Blackwall Tunnel largely affects the surrounding roads, rather than inside the tunnel itself.

Such disruptions have a negative financial impact due to the contract of the bus company. Therefore everyday congestion at the Blackwall Tunnel (the crossing most important to the business) has quite a large impact on the profitability of the business during a typical month.

In terms of staff travel, the company offers flexible working hours – though it is noted that staff generally do not start work early or are regularly late for work due to local traffic congestion. A further issue which has a major impact on the business at the site is the height restrictions at the Blackwall Tunnel, which specifically affects bus operations. In the depth interview it was indicated that width and height restrictions cause major disruption – as the Blackwall Tunnel can only be used in one direction by double decker vehicles. Services can pass through the tunnel in one direction, but must be returned again via Tower Bridge.

The proposed Silvertown Tunnel with no height restrictions would have a strong positive impact on business at this site. Some positive growth and increased investment in the business would also be expected in the event of the delivery of the Silvertown Tunnel.

It is a further expectation of the bus company that the Silvertown Tunnel would enable the company to take on more staff, and that it may help to increase the potential customer base. The bus company representative was not aware of the plan to route 38 buses per hour through the tunnel. While the effect of this improvement on the bus operator is unknown, it was hoped that they could share in the work. It was considered that this could be positive by providing more opportunity to expand the bus company's business.

As a final comment in the depth interview, it was indicated that it was important to the bus company that the enforcement of parking and signalised junctions in the area is fit for purpose.

7.11 CASE STUDY – FINANCIAL MARKETS COMPANY

The company operates in the finance and banking sector and has a site in Tower Hamlets from which it has operated for two years. The company does not operate from any other locations.

There are 180 staff employed at the site, of which three-quarters are skilled professionals, 20% are unskilled and 5% are managerial. In the last year, the number of staff working at the site has increased by up to 25%. In the last 12 months, the company has made efforts to recruit staff to this location, with 50 employees joining the company in the last 12 months. In the next 12 months staffing levels at the business are expected to further increase by up to 25%. The ability to recruit staff from across London does not appear to be a problem:

“We use an agency to provide candidates and they can be across the whole London area.”

The turnover of the company is not known, though it is expected that due to business expansion, this will increase by up to 25% in the next year.

The current business location benefits from good road, bus, rail and foot/cycle access, plus close proximity to East London river crossings. Few disadvantages of the business location are specified.

It is important for the business to have good access to Central London, Canary Wharf, Royal Docks/City Airport, Kent, and other parts of East London (north and south of the river). It is noted that it is difficult to access all of these locations due to the time involved in crossing the river, and that the journey times to these locations are inconsistent.

The characteristics of the premises are very important to the business, and are somewhat of a problem. Availability of relevant labour is also very important, but recruitment is no problem at all for the business. Ease of access to the site by customers and visitors is a very significant problem, and is very important to the successful running of the business. Access to markets is also a very important matter for the business.

Approximately 26-50 deliveries come to the site each week, with principal suppliers being located within Tower Hamlets, Barking & Dagenham, South East England outside of London, South West England, Europe and in the rest of the world. The business faces problems with deliveries to the site due to congestion both locally and in the wider area, and due to delays on the road network as a result of incidents. Deliveries are therefore timed so that they avoid rush hour periods.

“We mainly have a 9am-5pm delivery slot to avoid morning and evening rush hours.”

The movement of goods to and from the business site comprises less than 5% of turnover, though the value is over £10,000. In addition to the goods related movements into and out of the site, between 51 and 100 business trips depart from the site each week.

Deliveries are planned so as to avoid congestion, which results in additional time and associated costs. Deliveries also often need to take longer routes to avoid congestion. Time-critical deliveries have been missed, which can affect future business opportunities. A consequence of the disruptions has included limiting the number of customers that use the business.

“We deal with ‘a major logistics company’ and if there are any delays to collection or pick up times it can be a problem for us. If someone is waiting for a contract it could damage clientele or production time for our staff.”

All East London river crossings are important to the business, of which the Dartford Crossing is the most important – in their current condition the capacity of the East London river crossings does act as a barrier to development, and journey times for crossing the River Thames in the Blackwall area are very poor and unpredictable.

The business is affected by unplanned delays at the Blackwall Tunnel approximately 3-6 times per week, and such incidents have a major impact on the business at the site.

Staff will sometimes re-time their journeys or allow longer travel time to reach meetings and appointments. However, the disruption can still result in staff being late for these.

“With the recent tube strikes there was a great decline in the number of staff in the office. There are a lot of client meetings at the office and if there are a lot of delays then our staff members can’t meet their clients.”

In terms of staff commuting, staff often work late due to local traffic congestion, with staff being late for work due to congestion or incidents at the Blackwall Tunnel approximately 3-6 times per week.

“If there are any delays in the Blackwall Tunnel then it does affect our staff coming in late.”

A strong positive impact for the business would be expected as a result of the Silvertown Tunnel, with the business likely to operate cross-river more often to some extent. The business is greatly influenced by cross-river traffic and so there would be little impact resulting from the Silvertown Crossing.

The company appears receptive to the idea of new public transport connections being provided through the Silvertown Tunnel; with the connections it would provide being considered a particular positive.

“Most of our staff members hate public transport as they don’t have enough drivers so any form of public transport would help I think... That’s [bus links to the Royal Docks and Stratford] perfect as our main points of access are the DLR line so with Silvertown being DLR that will impact us.”

The company does not consider the idea of tolling the Silvertown and Blackwall Tunnels to have too much of a negative impact on staff travel, though there does appear to be some concern that the toll might affect the company financially.

“Considering we don’t have a lot of drivers in our building it shouldn’t impact on us too much. I think the charge for heavy goods vehicles will affect us more – the charge for deliveries may be passed onto us”

7.12 CASE STUDY – AN OFFICE SERVICING COMPANY

A service based business supporting its clients with office-based facilities, it has been located in Barking & Dagenham for 20 years, and also operates from other premises elsewhere in Greater London. The company is not currently seeking to recruit staff and has not done so for the last 12 months.

The company employs 11-49 staff, and in the last year staffing levels have increased by up to 25%. Of these staff, half are unskilled, 35% are skilled professionals, and 15% are managerial. It is anticipated that in the next 12 months, staffing levels at the site will remain close to their current level.

The site currently has an annual turnover of between £1 million and £5 million per year. It is expected that the turnover will increase by up to 25%, largely due to current economic conditions.

The main benefits of the site are the ease of access by road and the ease of transport and haulage. The main weakness of the business site in Barking & Dagenham is the transport links from the south of the river, which aren’t considered good and mean queuing.

“If you get a train you get a train into Upney and then walk (20min walk). You can drive straight here by car although it depends on the traffic and time of day...In the morning from 6am until 9.00-9.30am (when the kids are at school). If the kids are school it will get busy again from 15.00-15.30 and then ease off a little and it will start again until 18.30-19.00.”

A further problem identified relates to the telecommunications at the site.

“We can’t get good broadband on our side of the A13. We’re based near Lodge Avenue Flyover and there is no linkup where we are. They say it will come in the future but we don’t know when. Our speeds are less than 10MB.”

The locations deemed to be most important in terms of access to the site are Central London, Canary Wharf, the M25, A13 corridor, Greenwich, other parts of East London (north and south of the river), Essex and Kent. Locations to the east of London, both north and south of the River Thames are therefore deemed to be the most important locations for the business. Access to these locations is currently considered to be mainly good in terms of the time taken to cross the river, and also in terms of reliability. However, the A13 does appear to suffer from congestion and traffic issues.

“If you have to travel the A13 to the Ship and Shovel junction there is always traffic and accidents there. A 5min journey can take an hour at least...People just have to leave early.”

The organisation places a great deal of importance on the availability of labour, the ease of receiving and dispatching goods and for access to and from the site for customers, clients and markets. However, all of these aspects are identified as being significant problems for the business in its current location. The business currently receives between 26 and 50 inbound deliveries to the site per week, with principal suppliers being located in Greater London and South East England, Wales, Scotland, Europe and the rest of

the world. Congestion in Greater London and beyond has been identified as a problem with deliveries to the site.

The company presently spends over £10,000 on goods movements into and out of the site, accounting for 11-24% of turnover. Furthermore, between 101 and 500 staff business trips are made from the site, all of which are by van.

The Blackwall Tunnel and Dartford Crossing are important crossings of the River Thames, with the Woolwich Ferry being the least important, and the Dartford Crossing being the most important.

The current capacity of the East London River Crossings does act as a barrier to business development, with journey times crossing the Thames in the Blackwall area being very poor and unpredictable. Unplanned delays and the unpredictability of journey times at the Blackwall Tunnel cause major disruptions to the business on a daily basis. However, it is pointed out that the crossings themselves are not necessarily the difficulty, but the structure of the roads to access them.

"[It's] not so much the river crossings but more the structure of the roads over here. Blackwall Tunnel is an absolute nightmare; I try not to use it."

Deliveries are planned so as to avoid congestion, which may mean that longer routes need to be used. Further to this, additional staff and vehicles are needed due to the time lost through delays, while time critical deliveries have been missed which has affected future business opportunities. While staff will allow longer to travel to appointments, they are often still late. Disruptions also result in unhappy customers, limiting the number of customers that the business has.

Congestion and incidents at the Blackwall Tunnel, missing time-critical deliveries, staff being late for meetings and the reduced customer base all have an adverse effect on business profitability during a typical month.

"Time is money - time lost due to delays."

Staff commuting is also affected, with staff often starting work earlier or finishing work late, in order to avoid local traffic congestion – this is despite the company not offering flexible working hours. Other staff are regularly late for work due to local traffic congestion – with this being estimated to happen between 3 and 6 times per week. It is estimated that the annual cost to the business of staff being late to work is approximately £20,000.

If crossing journey times were made more reliable, it is expected that the business would be likely to operate across the river more often. Further to this, a crossing at Silvertown would be expected to have a strong positive impact on business growth and investment.

"You'd be able to get around a lot quicker, there would be an alternative route for people to take which should relieve the pressure on the other two... it would help relieve the pressure on the crossing. I hope they do something with the roads around it."

Currently, unpredictable journey times cause a loss in revenues – but the company representative would be happy to pay a toll for more reliable journey times, though this should have smartcard payment options.

7.13 CASE STUDY – FIELDSIDE CARE HOME

The Fieldside Care Home is a service sector business based in the London Borough of Lewisham, and has operated from its current premises there for 29 years.

The care home employs 25 staff, and over the last year the number of staff at the care home has not changed. In the last 12 months, there has been an attempt to recruit staff to work at the care home, resulting in two new members of staff joining the company. Around 80% of the staff employed at the care home are unskilled, while 15% are skilled professionals and 5% work at a managerial level.

The care home experiences particular difficulty in recruiting domestic assistants, and has wider difficulties in recruiting staff to the business. The availability of labour is a significant problem for the company, with the main problem experienced described as difficulty in finding staff with the right skills. Staff numbers at the care home are not expected to increase over the next 12 months.

[Difficulties recruiting staff in current location]...*“Staff coming across the water (having to use either of the tunnels) will struggle to get through when the shifts change at peak hours. Bad congestion at Blackwall Tunnel.”*

The care home has a turnover of between £500,001 and £1 million per annum, and this is expected to remain at current levels over the next 12 months as there are no expectations of growth of the care home business.

The main benefit of the current business location is the anticipated increase in land values, while there are no identified weaknesses of the current business location. Due to the nature of the business, it does not appear that access to any locations is important to the care home. However, the characteristics of the premises, availability of labour, and proximity to other companies in the same sector are all very important matters for the business at the site.

Easy access for receiving/dispatching goods, and getting to and from the site for visitors, customers or clients – are important matters for the day to day running of the care home. However ease of access to markets is not at all important to the care home. There are significant problems with the ease of receiving and dispatching goods, and also in terms of access to clients.

Fieldside Care Home receives approximately six inbound deliveries each week from other locations in Greater London. The main problem associated with deliveries to and from the site is from congestion more widely throughout greater London. At present, Fieldside Care Home spend less than £1,000 each year on the movement of goods into and out of the business site, which accounts for less than 5% of annual turnover.

There are between 11 and 25 staff business trips from the site each week, all of which are made by bus.

The East London River Crossings are not considered to be important to the business, and the capacity of the crossings does not act as a barrier to business development. However, it is agreed that the predictability of journey times in the Blackwall area is very poor, and unplanned incidents at the Blackwall Tunnel affect the business on a daily basis.

Daily congestion, unplanned incidents and unpredictable journey times crossing the River Thames near Blackwall do cause major impacts on the business. The consequence of these disruptions is that staff can be late for meetings and appointments – though this has little effect on business profitability during a typical month.

It is noted that the Blackwall Tunnel is often congested when travelling to work, and that it affects the ability of some staff to get to work. To counteract this, some staff re-time their journey to work to avoid traffic congestion – despite this, other staff are still regularly late for work due to local traffic congestion. It should be noted that the employer does not currently allow flexible working – so this may mean that staff set off very early in order to arrive at work on time.

(Incidents at the Blackwall Tunnel)...*“would only affect staff coming in, and they don’t tell me. Probably every morning I’d guess and equally in the evenings going home.”*

Incidents and/or congestion at the Blackwall Tunnel cause staff to be late for work approximately once or twice a week. It is noted that the company does not offer flexible working hours.

“They [the staff] are not allowed to [re-time their journeys], it wouldn’t work for me”

A strong positive impact is expected if a new Silvertown Tunnel with no height restrictions opened in the area. However, if river crossing journey times in the Blackwall / Silvertown area were made more reliable it is

not expected that this would make any difference to the business in terms of operating across the River Thames.

There is strong disagreement with the idea that the current river crossings are adequate and that capacity does not need to be increased. There is strong agreement that unpredictable journey times crossing the river cause a loss in revenue. There is support for a toll charge provided that it provides more reliable journey times and has smartcard options for payment.

It is felt that a new river crossing at Silvertown would have no impact on the growth of business at Fieldside Care Home, nor would it lead to further investment in the business. However, the principle of the proposed tunnel is supported.

“Traffic is impossibly bad and has a negative impact on the environment, pollution and anyone living within a mile of the area. I often see queues at the Dartford Crossing which looks like it’s not moving and for the growth we need in the south east to be facilitated they desperately need to be building something and quickly. The most obvious place to build is near the Blackwall Tunnel.”

The proposal for new bus services through the Silvertown Tunnel was also welcomed, with the main benefits considered to be for staff travel and helping with business recruitment.

“It will benefit my staff and improve their morale and might make recruitment easier.”

7.14 CASE STUDY – CRYSTAL CLEANING SUPPLIES

Crystal Cleaning Supplies are based in the London Borough of Bexley and have operated from their premises there for 30 years. The business operates in the wholesale distribution sector, and operates from more than one premises, which is/are also based in the London Borough of Bexley.

The business currently employs 14 staff, and over the last 12 months, the number of staff at the location has not changed. Of the 14 staff working at Crystal Cleaning Supplies, seven work at a managerial grade, and seven work at an unskilled staff level. In the last 12 months the company has not attempted to recruit staff at this location. The company does not identify any vacancies that are particularly difficult to fill. However, it is noted that the availability of relevant labour is an issue for the business.

The company prefers to employ local staff and does not currently recruit from further afield due to the potential for delays in staff arriving at work. It is felt that reduced congestion at the river crossings would enable the company to overcome this issue and enlarge their area of recruitment.

“We don’t want delays with staff arriving at work so we only recruit from the immediate vicinity...Hypothetically if there was little congestion then we would be happy to recruit from a wider area.”

The company identifies that there are barriers which prevent the business from achieving its growth targets, namely the congestion charge, which causes problems for deliveries to and from the site.

“I’m very concerned that if they charge for it (the Silvertown Tunnel), it’s going to be even worse. The idea of the congestion charge was to ease the traffic but it’s done no such thing. It’s just taken another £600 per month of our bottom line but has made no difference to the traffic at all.”

The main point of opposition is that the company doesn’t have a choice in terms of the need to access Central London, and feel that they are being penalised. The idea of tolling the Silvertown and Blackwall Tunnels is not well received.

“You don’t go into Central London because it’s a nice place to drive about, you go in because it’s essential to your business and that’s where we trade. It was just a means to make money. I can’t send a van with 200 cases of toilet roll to a bus stop and make the delivery, it has to go

to its destination by van but you're charging us to trade with companies who are supporting the city."

The company also specified that it has concerns about the potential for tolling, and the impact that this may have on their ability to trade.

"Charging will be another nail in our coffin. At that point we'd have to have a serious appraisal of whether it is in fact worth continuing. We're paying 25% extra for the staff, £600 per calendar month for the congestion charge and if they are charging for the other tunnels as well there's not going to be enough money in the stock to continue."

The location advantage of Crystal Cleaning Supplies' site is the ease of access by road, while the main weaknesses are the affordability of the site / premises and time wasted in traffic due to local congestion. Such delays have been known to affect supplies.

"We have timed deliveries. For instance, tomorrow we have a delivery in Potters Bar at 9am – we have to allow 2hrs to get to the site."

Access to all parts of London, the M25 and the neighbouring counties of Kent and Essex are very important to the business as a supplier, and in terms of time taken to cross the River Thames, all are considered to be very easy to access, and journey times are considered to be consistent. The importance of access for Crystal Cleaning Supplies is evident in the fact that the company considers ease of receiving / dispatching goods, ease of access to the site for customers, and from the site for markets, very important.

"We have vans which deliver through the city, through the congestion charge and via the Dartford Crossing and Blackwall Tunnel. Daily we have to receive paper products which come from the Midlands and they all have to come across the river at some point. If they are going to charge those suppliers, that will have a further cost to us to buy the product."

The company receives approximately 40 inbound deliveries to the site each week, which come from their principal suppliers in the Midlands. The business spends over £10,000 per year on the movement and haulage of goods into and out of the site. Staff make 51-100 trips a week from the site (excluding goods movements) all of which are made by car.

Tower Bridge, the Blackwall Tunnel and the Dartford Crossing are the most important crossings of the River Thames, closely followed by the Rotherhithe Tunnel. The current capacity of the East London River Crossings does act as a barrier to business development, with journey times considered to be unreliable and unpredictable, while unplanned incidents and delays at the Blackwall Tunnel occur on a daily basis and have a major effect on the business. Such disruptions have previously resulted in time critical deliveries being missed, which has let down clients or affected future business opportunities. Furthermore, business profitability is greatly affected by everyday congestion and unpredictable incidents / journey times at the Blackwall Tunnel, and staff have been late for meetings.

"We're finding that vans are consistently leaving here and not getting to their first delivery for several hours albeit only 15 miles away from Central London. It's taking us a long while to make that short journey and the closer you get to the river the worse the congestion is. Instead of doing 20 drops a day for each van, we're doing 14 or 15. We're having to take on more staff to accommodate the work which cuts right into our profit...Probably increasing our costs by 25%."

Time critical deliveries being missed can have an effect on business profitability, by reducing the customer base significantly, and there are additional costs incurred by the business as a result of the need to pay overtime to drivers to have time in hand for deliveries.

"I have to get a driver in early to leave at 7am and instead of it taking 2hrs, if it takes 3hrs we have an irate customer on the phone. It's bad on our reputation, I have to pay overtime to the driver, he is late coming back and it has a knock on affect. It makes us look bad in the eye of the customer that we are not performing, even though we have made every provision to do so."

In terms of staff commuting, it is noted that the Blackwall Tunnel is often congested when travelling to work, but does not affect ability to get to work.

If a tunnel was constructed at Silvertown, it is expected that it would enable Crystal Cleaning Supplies to operate across the river to a large extent. The current crossings of the River Thames in East London are felt to be largely inadequate and there is a need to further increase capacity. Despite this, there does not appear to be preparedness to pay for any new crossing.

“If there were more crossings it would definitely be easier and I’d like to see the East London River crossing happen. There is always congestion at the Dartford Bridge even though they’ve taken the tolls away. We need a way to cross the river so that it doesn’t impact on our business but we don’t want to pay. We pay enough now.”

Tolling options for the Silvertown and Blackwall Tunnels do not appear to be supported, with the company being unhappy with the idea of paying to cross the river, an action which would lead the company to look to alternative routes, even if these were longer. The additional costs may even lead the company to consider relocating away from the area. However, a toll with an exemption for local businesses is supported by Crystal Cleaning Supplies.

“I think the answer would be for local businesses to be exempt from paying the toll of the Dartford Bridge, congestion charge and the East London charge. We are servicing the city, they couldn’t trade without us servicing them so why are we being penalised? I can understand tourists and even private people being charged.”

7.15 CASE STUDY – LIGHT PROJECTS GROUP

Light Projects Group is a manufacturer and designer of architectural lighting, based in the London Borough of Southwark. The company also operates from other premises in South London. The company currently employs 22 staff, and has taken on three staff in the past year. Recruitment of sales staff is the most difficult vacancy to fill for the business.

There are a number of reasons given as to why the business has issues with recruitment, including the presence of poor transport links, poor quality applicants, and a local congestion problem at Jamaica and St James Road.

“Take the corner of Jamaica Road and St James Road which is crossroads, TFL haven’t put in a yellow box so both in the morning and evening the area gridlocks as everyone is trying to get to the Rotherhithe Tunnel. That obviously reflects on vans and suppliers to us and is one of the reasons why we have moved our factory from Southwark to Mitcham in Surrey. It’s very frustrating.”

Currently, many staff commute to Light Projects Group from locations across London, mainly by Underground. However, the opening of a new tunnel at Silvertown is considered likely to have an effect.

“We might get people that will be north of the river being prepared to come to the south for employment. At the moment we have people all over London but they are very much tube dependent so that will be a plus. People are not prepared to endure the delays at the Blackwall Tunnel day in day out.”

The current annual turnover for Light Projects Group is between £1 million and £5 million, with this expected to remain within these margins over the next 12 months. Staffing levels at the company are expected to increase by up to 25% in the next year. A barrier identified in terms of achieving local growth targets has been the lack of available car parking for clients, which is prompting the company to consider moving from its current location.

The main benefits of the current business location are the suitability of the current premises and the proximity to suppliers and customers. However, there are also a number of weaknesses with the current business location, including the affordability of the site, issues with local congestion and time wasted sitting in traffic, plus difficulties with transport and haulage from the site. The lack of parking and traffic control systems is also a weakness of the site.

“There is now no way of going south, I now use the Jubilee which means I can’t carry samples and therefore get less jobs. As far as Blackwall goes, it’s been a bone of contention for years. A new crossing can only help.”

Access to the Royal Docks and Essex are especially important, while Canary Wharf, the A13 corridor and other parts of East London north and south of the Thames are also important to the business. Stratford, Kent and the M25 are of little importance to the company in terms of accessibility. There are few problems in terms of crossing the river, although access to Royal Docks and Essex are somewhat more difficult for the business. Journey reliability to travel to Essex is considered more unreliable in terms of consistency of journey time.

Characteristics of the business premises are very important to the successful running of the business, as is the availability of relevant labour. Access is also a key aspect for the business, with access to the site by customers and visitors being very important, as is access from the site to customers, clients and markets. Light Projects Group has significant problems with the availability of relevant labour, ease of receiving/dispatching goods, ease of access to site by visitors, and from the site for markets. Despite these issues, the company currently has no plans to relocate in the next 12 months.

On average, the business receives 50 inbound deliveries to the site per week, from principal suppliers in Greenwich, Southwark, Newham, elsewhere in Greater London, all regions of England, in Europe and the rest of the world.

Deliveries to Light Projects Group face a number of problems, including traffic congestion, both locally and more widely across Greater London. Delays on the roads due to incidents also pose a problem, while poor traffic management (i.e. traffic light timings) also cause issues.

“They continue to drag a Thames sailing barge from the inner pool to the outer pool often during rush hour. It makes a delay of around 35 mins for a sales guy sitting in his car.”

The company responds to transport challenges by scheduling deliveries so that they avoid peak hour congestion. Deliveries and haulage into and out of the site cost the company around 5-10% of turnover each year, with a value of over £10,000. Staff also make approximately 51-100 business trips from the site each week.

Tower Bridge and the Rotherhithe Tunnel are considered to be the most important Thames crossings for the operation of the business while the Woolwich Ferry is considered to be of no importance.

The current capacity of the East London River Crossings acts as a barrier to business development, while journey time predictability for crossing the Thames in the Silvertown / Blackwall area is rated as being very poor. Business at the site is affected by unplanned incidents and delays at the Blackwall Tunnel around 3-6 times per week – such incidents cause major disruption to the business, as does the unpredictability of journey times in crossing the river.

To counteract the disruptions at the site, additional time is used to plan deliveries to avoid congestion, though these have associated costs. Deliveries are also planned to take longer routes in order to avoid congestion. Despite these efforts to counteract the disruptions, time critical deliveries have been missed which have affected future business opportunities and let down clients. Disruptions such as these can limit the number of customers that use the business, and lead to unhappy customers.

Staff also plan trips to allow longer in order to travel to meetings and appointments, though in spite of these efforts, they can still be late for these appointments. Where staff are late for meetings, this can have a considerable effect on business profitability. It was noted during the depth interview that there is an additional cost in wages of 25% due to staff allowing extra time for their journeys.

Missed time-critical deliveries and reduced customer base can have a considerable adverse effect on business profitability during a typical month, while everyday congestion at the Blackwall Tunnel also has an impact. There is strong agreement that unpredictable journey times cause a loss in revenues.

If crossings in the Silvertown area were made more reliable, it is likely that the business would operate cross-river to a greater extent. The current crossing options are felt to be inadequate and there is a considerable need to further increase capacity. However, tolling the crossings is not supported and alternative routes would be sought if one was introduced. The impact of such tolls is also felt to be greater for poorer businesses.

"I can see a lot of the poorer companies trying to avoid them (tolls). I think a lot will be forced to use them and I think it will be the end client (which is us) having to swallow the cost. There will be a point where we turn around and say why don't we move out to Redhill – that'll be easier, less costly for staff etc."

Appendix A

FINAL QUESTIONNAIRE

FINAL QUESTIONNAIRE**Silvertown Tunnel business survey**

Date

Telephone

S Screener

ASK TELEPHONIST

- S1 Good morning / afternoon. My name is NAME and I'm calling on behalf of WSP Group and Transport for London. Please can I speak to the person within your organisation who is responsible for the management of your business premises?**

For example, involved in the organisation's decision making on factors such as business location, operation and staff recruitment.

Transferred	1	CONTINUE
Hard appointment	2	MAKE APPOINTMENT
Soft Appointment	3	
Refusal	4	
Refusal – company policy	5	CLOSE
Refusal – Taken part in recent survey	6	
Nobody at site able to answer questions	7	
Not available in deadline	8	
Engaged	9	
Fax Line	10	
No reply / Answerphone	11	
Residential Number	12	
Dead line	13	
Company closed	14	

ASK ALL

- S2 We're conducting a survey on behalf of Transport for London (TfL) who are interested in finding out about economic characteristics of local businesses and expectations of potential impacts of a new river crossing at Silvertown near to the existing Blackwall Tunnel.**

ADD IF NECESSARY: As a local business, your views and experiences are very important in helping Transport for London to understand the potential economic impact of the Silvertown Tunnel on the local business community and to understand how it can play a part in supporting growth and regeneration.

Continue	1	CONTINUE
Referred to someone else at establishment NAME: JOB TITLE:NAME_____	2	TRANSFER AND RE-INTRODUCE
Hard appointment	3	MAKE APPOINTMENT
Soft appointment	4	
Refusal	5	THANK AND CLOSE
Refusal – company policy	6	
Refusal – taken part in recent survey	7	
Not available in deadline	8	

S3 Before I start the interview, I would like to ask you a few questions to check that you are eligible to take part in the survey. Can I just confirm that your premises are in: [London Borough from Sample]?

Yes	1	Go to S5
No	2	Go to S4
Don't know	3	Go to S4
Refused	4	Thank and close

ASK IF S3=2, 3

S4 Are your premises within any of the following London Boroughs? READ OUT. SINGLE CODE

Tower Hamlets	1	Go to S5
Newham	2	Go to S5
Barking & Dagenham	3	Go to S5
Southwark	4	Go to S5
Lewisham	5	Go to S5
Greenwich	6	Go to S5
Bexley	7	Go to S5
None of these	8	THANK AND CLOSE
Don't know	9	THANK AND CLOSE
Refused	10	THANK AND CLOSE

ASK IF S3 = YES OR IF S4 = 1,2,3,4,5,6,7

A1 S5 How long has your business been based in [only read out Boroughs named in S3 OR S4]? WRITE IN NUMBER OF YEARS, WITH 1 FOR UP TO A YEAR

A2

	WRITE IN	Don't know	Refused
1. Tower Hamlets		98	99
2. Newham		98	99
3. Barking & Dagenham		98	99
4. Southwark		98	99
5. Lewisham		98	99
6. Greenwich		98	99
7. Bexley		98	99

A3

A4 ASK ALL

S6 Which of the following best describes the type of business that your company operates here?

READ OUT MULTICODE OK

SIC DESCRIPTION ON SAMPLE	1	
Manufacturing/Primary	2	
Construction	3	
Retail, hospitality, transport or distribution	4	
Services (i.e. no physical goods produced or sold)	5	
Public sector services	6	
Waste collection, treatment and disposal activities;	7	
Land transport and transport via pipelines	8	
Water or Air Transport	9	
Warehousing and support activities for transportation	10	
Postal and courier activities	11	
Wholesale trade, except of motor vehicles / motorcycles	12	
None of these	13	THANK AND CLOSE
Don't know	14	THANK AND CLOSE
Refused	15	THANK AND CLOSE

A5

A6 S7 In total, how many staff (including yourself) work at this site?

This includes owners, managers, directors, full- and part-time staff, freelance self-employed staff and casual staff.

WRITE IN NUMBER	NUMERIC ONLY GREATER THAN ZERO	
Don't know	98	
Refused	99	

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES SINGLE CODE

1 -10	91
11 - 49	92
50 - 199	93
200+	94

S8 In the last year has the number of staff working here at this site increased or decreased, and if so by what percentage (approximately)?

A7 CODE PERCENTAGE STATED WITHIN THE APPROPRIATE BAND (PROMPT AS NECESSARY)

Increased by more than 50%	1
Increased by 26 – 50%	2
Increased by up to 25%	3
No change	4
Decreased by up to 25%	5
Decreased by 26 – 50%	6
Decreased by more than 50%	7

Don't know	8
Refused	9

S9 Approximately what percentage of your staff at this site are in the following grades / skill levels?

A8

	WRITE IN	DK	REFUSED
Managerial		98	99
Skilled Professionals		98	99
Other staff		98	99

S10 Please can you describe the nature of your business at this site in more detail.

WRITE IN

S11 In which of the following turnover band does work at this site fall into over the last financial year? Turnover consists of total takings or invoiced values of the business (excluding VAT) in connection with the sale of goods and services. (READ OUT)

Up to £50,000	1
£50,001 to £100,000	2
£100,001 to £500,000	3
£500,001 to £1m	4
>£1m to £5m	5
>£5m to £10m	6
>£10m to £20m	7
>£20m to £100m	8
Over £100m	9
Don't Know	10
Refused	11

The interview will take around 20 minutes to complete and you do not need to answer any question you do not wish to.

Please note that all data will be reported in aggregate form and your answers will not be reported to our client in any way that would allow you to be identified. This is in accordance with the Code of Conduct of the Market Research Society

If respondent wishes to confirm validity of survey or get more information about aims and objectives, they can call:

- **MRS: Market Research Society on 0500396999**

This call may be recorded for quality and training purposes only.

A Company Information and recruitment

I would like to start by asking you some questions about the characteristics of your workplace.

A1 Firstly, I would like to check the contact details for your organisation:

- a) **Business Name:**
- b) **Respondents Name:**
- c) **Respondents Job Title:**

WRITE IN (SEPARATE TEXT BOXES FOR EACH ROW A TO C INTERVIEWER IF ZERO TYPE IN 0 – DO NOT LEAVE BLANK
--

A2 Does your business also operate from other sites or premises?

Yes	1	ASK A3
No	2	GO TO A4
Don't know	3	GO TO A4

IF ALSO OPERATES FROM OTHER SITES (A2=1)

A3 Where are they located?

CODE ALL THAT APPLY

In Borough [INSERT BOROUGH FROM S3 OR S4]	1
In South London	2
Elsewhere in East London (North of the Thames)	3
Elsewhere in Greater London	4
In the UK	5
In Europe	6
Rest of the World	7
Don't know	9

A4 Are you currently, or have you in the last 12 months, tried to recruit staff at this location

Yes, currently	1
Yes, in the last 12 months	2
No	3 GO TO Section B

A5 a) Approximately how many employees, if any, have you taken on in the last 12 months at this location?

.Employees taken on in last 12 months	WRITE IN VALUE
---------------------------------------	----------------

A6 IF RECRUITED AT A5 ELSE GO TO SECTION B

Approximately what proportion of applicants for the post or posts you have tried to fill at this site in the last 12 months are local:

[IF STATE THE NUMBER OF POSTS, REFER BACK TO S5 AND CALCULATE PERCENTAGE]

a) From this side of the Thames SINGLE CODE

b) From the other side of the Thames SINGLE CODE

Local	a) - This side of Thames	b) - Other side of Thames
None		
Up to 25%	1	1
26% to 50%	2	2
51% to 75%	3	3
76% to 100%	4	4
Don't know	5	5
Refused	6	6

A7 What type of jobs are easiest to fill and which are most difficult at this site?

a) Easiest to fill	1
WRITE IN	
b) Most difficult to fill	2
WRITE IN	

A8 Do you experience any difficulty recruiting staff in this location?

Yes	1	GO TO SECTION B
No	2	
Don't know	3	
Refused	4	

A9 Please explain why you have problems recruiting staff at this location?

UNPROMPTED - PROBE - CODE ALL THAT APPLY

Difficult to get staff to travel to this side of the river	1
Poor bus service	2
Poor road transport links	3
Poor transport links, other	4
Location of business	5
Type of work/ difficult to find right skills	6
Poor quality applicants	7
Antisocial working hours	8
Applicants seeking part-time work	9
Do not advertise enough	10
Low salaries offered/ 'benefit trap'	11
Other – specify	11

B Business expectations for the next 12 months

This section asks about your expectations for your business at this site over the next 12 months.

B1 To what extent do you expect the number of staff you employ at this site to change over the next 12 months? READ OUT

SINGLE CODE

Increase by more than 25%	1	
Increase by up to 25%	2	
Stay about the same	3	
Decrease by up to 25%	4	
Decrease by more than 25%	5	
Don't know	6	
Refused	7	

ASK ALL

B2 To what extent do you expect your turnover at this site to change over the next 12 months? READ OUT

SINGLE CODE

Increase by more than 25%	1	
Increase by up to 25%	2	
Stay about the same	3	
Decrease by up to 25%	4	
Decrease by more than 25%	5	
Don't know	6	GO TO B4
Refused	7	

B3 Why do you say that? PROBE

*WRITE IN
CODING FRAME TO EXPAND ON FIELDWORK*

B4 Putting aside the state of the UK and Global economy and other national issues such as regulations on business etc... are there any local barriers that may prevent you from achieving your growth targets, if you have any?

Yes	1	GO TO SECTION C
No	2	
Do not have a growth target	3	
Don't know	4	

B4A IF YES What are they?...PROBE

WRITE IN

C Location

C1 Please describe the main benefits of your current business location:

DO NOT READ OUT. CODE ALL THAT APPLY. PROBE AS NECESSARY

Site specific	Affordability of site / premises	1
	Security of lease	2
	Anticipated increase in land values	3
	Quality / suitability of current premises	4
	Proximity to suppliers and customers	5
	Proximity to businesses in same sector	6
	Size of premises	7
Accessibility	Ease of access by road (incl. motorways)	8
	Ease of access by bus	9
	Ease of access by rail / DLR	10
	Ease of access on foot or by bicycle	11
	Ease of transport / haulage	12
	Proximity to East London River Crossings	13
Staff	Availability of appropriately skilled employees	14
	Availability of affordable housing for staff	15
	Ease of access by staff	16
Other (SPECIFY)		17
DON'T KNOW		19

C2 Please describe the main weaknesses of your current business location:

DO NOT READ OUT. CODE ALL THAT APPLY. PROBE AS NECESSARY.

Site specific	Affordability of site / premises	1
	Security of lease	2
	Anticipated increase in land values forcing business out of area	3
	Quality / suitability of current premises	4
	Size of premises	5
	Crime	6
	Proximity to suppliers, customers	7
	Proximity to, similar businesses	8
Accessibility	Difficulty of access by road	9
	Difficulty of access by bus	10
	Difficulty of access by rail / DLR	11
	Difficult to access other side of River Thames	12
	Local congestion, time wasted in traffic	13
	Difficulty of transport / haulage	14
	Reliability of E London River Crossings, both service and times	15
	Remote from markets	16
Staffing	Difficulty recruiting appropriately skilled employees	17
	Difficulty attracting staff due to location	18
	Difficulty retaining staff due to location	19
	Lack of affordable housing	20

Other (SPECIFY)		21
DON'T KNOW		22

C3 From your present site, how important is it for your business to access the following locations from this site, using a scale of 1 to 5, where 1 = Not at all important, and 5 = Very important. ROTATE

		Not at all important			Very important			DK
A	Central London	1	2	3	4	5	6	
B	Isle of Dogs / Canary Wharf	1	2	3	4	5	6	
C	Royal Docks and City Airport	1	2	3	4	5	6	
D	M25	1	2	3	4	5	6	
E	A13 corridor from Barking to Rainham	1	2	3	4	5	6	
F	Westfield / Stratford	1	2	3	4	5	6	
G	Greenwich, Charlton and Woolwich	1	2	3	4	5	6	
H	Bexley, Erith and Thamesmead	1	2	3	4	5	6	
I	Other parts of East London – south of the river	1	2	3	4	5	6	
J	Other parts of East London – north of the river	1	2	3	4	5	6	
K	Essex	1	2	3	4	5	6	
L	Kent	1	2	3	4	5	6	

FOR ALL C3 A-L = 4/5 ASK ELSE GO TO C5

C4 How easy is it for you to reach these locations in terms of:

- Actual time taken to cross the river**
- Journey reliability in terms of consistency of journey time for the entire trip?**

Please give your responses on a scale of 1 to 5, where 1 = Very easy .and 5 = Very difficult,

	A) Time taken					DK	B) Journey reliability					DK	
	Very difficult				Very easy		Very difficultt				Very easy		
A	Central London	1	2	3	4	5		1	2	3	4	5	
B	Isle of Dogs / Canary Wharf	1	2	3	4	5		1	2	3	4	5	
C	Royal Docks and City Airport	1	2	3	4	5		1	2	3	4	5	
D	M25	1	2	3	4	5		1	2	3	4	5	
E	A13 corridor from Barking to Rainham	1	2	3	4	5		1	2	3	4	5	
F	Westfield / Stratford	1	2	3	4	5		1	2	3	4	5	
G	Greenwich, Charlton and Woolwich	1	2	3	4	5		1	2	3	4	5	
H	Bexley, Erith and Thamesmead	1	2	3	4	5		1	2	3	4	5	

I	Other parts of East London – south of the river	1	2	3	4	5		1	2	3	4	5	
J	Other parts of East London – north of the river	1	2	3	4	5		1	2	3	4	5	
K	Essex	1	2	3	4	5		1	2	3	4	5	
L	Kent	1	2	3	4	5		1	2	3	4	5	

ASK ALL

C5 I would now like to ask you how important each of the following factors is to the successful running of your business at this site. Please give your responses on a scale of 1 to 5, where

1 = Not at all important and 5 = Very important. ROTATE

	Not at all important					Very important	DK
_A Characteristics of your Premises [Such as operating space, cost, quality]	1	2	3	4	5	6	
_B Availability of relevant labour	1	2	3	4	5	6	
_C Ease of receiving or dispatching supplies / goods	1	2	3	4	5	6	
_D Ease of access to this site by customers or visitors	1	2	3	4	5	6	
_E Ease of access from this site to customers, clients or markets	1	2	3	4	5	6	
_F Proximity of other companies in the same sector	1	2	3	4	5	6	

C6 To what extent have these same factors caused problems for your business at this site, if at all?

Please give your responses on a scale of 1 to 5, where 1 = No problem at all and 5 = A very significant problem. ROTATE

	No problem at all					Very significant problem	DK
_A Characteristics of your Premises [Such as operating space, cost, quality]	1	2	3	4	5	6	
_B Relevant labour and Availability of relevant labour	1	2	3	4	5	6	
_C Ease of receiving or dispatching supplies / goods	1	2	3	4	5	6	
_D Access to this site by customers or visitors	1	2	3	4	5	6	
_E Access from this site to customers, clients or markets	1	2	3	4	5	6	
_F Proximity of other companies in the same sector	1	2	3	4	5	6	

ASK ALL

C7 Do you expect your business to move from this site within the next 12 months?

Yes	1	GO TO C8
No	2	GO TO SECTION D
Don't know	3	

ASK IF EXPECT BUSINESS TO MOVE (C7=1)

C8 Do you think that there will be a suitable site or premises available to you within South or East London, or have you already found somewhere? SINGLE CODE

Yes, found somewhere within South/East London	1	GO TO C9
Yes, will expect to find suitable premises within South/East London	2	
No, found somewhere outside South/East London	3	
No, do not expect to find suitable premises within South/East London	4	
Not applicable / don't intend to search in this area	5	GO TO SECTION D
Don't know	6	

ASK IF C8=1-4 ELSE TO SECTION D

C9 Why do you say that?

<p><i>WRITE IN CODING FRAME TO EXPAND ON FIELDWORK</i></p>
--

PROBE TO UNDERSTAND FACTORS SUCH AS SIZE, CONDITION, VACANCY, COST, ACCESSIBILITY OF LAND, SPACE FOR ANY EXPANSION OR CONSTRUCTION OF NEW PREMISES, CODING FRAME TO EXPAND ON FIELDWORK.

MULTICODE OK

Need to be on same side of river	1	
Need to still link to M25/A13/A11	2	
Lease is up on current premises/site	3	
EXPAND ON FIELDWORK	4	
Don't know	5	

D Deliveries

ASK ALL

This section asks about the movement of goods, materials and supplies into and out of this site...

D1 Do you receive deliveries of these to this business site?

Yes	1	Answer D2
No	2	GO TO SECTION E

D2 Approximately how many inbound deliveries arrive at this site per week?

WRITE IN NUMBER	
Don't know	SEE BELOW
Refused	99

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES / DP CODE NUMBER TO RANGE

None	0
1 – 10	91
11 – 25	92
26 – 50	93
51 – 100	94
101 – 500	95
Over 500	96

D3 Where are the principal suppliers for this site located? PROBE TO CLARIFY WHICH LONDON BOROUGHS LISTED ARE INCLUDED CODE ALL THAT APPLY

Greenwich	1
Southwark	2
Bexley	3
Lewisham	4
Tower Hamlets	5
Newham	6
Barking & Dagenham	7
Elsewhere in Greater London	8
South East England outside London	9
South West	10
Midlands	11
North	12
Wales	13
Scotland	14
Ireland	15
In Europe	16
Rest of the World	17
Don't know	18

D4 Please describe the nature of problems, IF ANY, you face with deliveries to or from this site?

DO NOT PROMPT, CODE ALL WHICH APPLY, RECORD OTHER RESPONSES

Site related	Parking	1
	Volume of goods	2
	Localised access issues at the site itself	3
	Location of main clients/customers	4
Traffic related	Congestion locally	5
	Congestion more widely (Greater London or beyond)	6
	Delays on the road network due to incidents	7
	Crossing the River Thames	8
	Poor traffic management (e.g. traffic lights)	9
	Scheduling for deliveries to avoid peak hours (congestion)	10
Costs related	Cost of Haulage	11
	Congestion charge	12
	Road charges (e.g. Dartford)	13
Vehicle related	Weight limits / restrictions	14
	Height limits / restrictions	15
	Low emissions zone	16
Business related	Export or import factors (e.g. moving goods into or out of the UK)	17
	Proximity to suppliers	18
	Reliability of suppliers	19
	Reliability of haulage company	20
Staff related	Availability of labour (e.g. drivers or handlers)	21
	Other labour factors (e.g. reliability / quality of drivers / handlers)	22
Other (SPECIFY)		23
Don't know		24
No problems		25

D5 Approximately how much of your costs are spent each year on the movement or haulage of goods and materials into and out of this site?

- a) READ OUT BANDS
b) As a percentage of turnover

a) VALUE		b.) Percentage of turnover	
Less than £1000	1	Less than 5%	1
£1000 - £5000	2	5-10%	2
£5001- £10,000	3	11-24%	3
Over £10,000	4	At least 25%	4
Don't Know	5	Don't Know	5
Refused	5	Refused	6

E Customers and Business Trips

E1

To what extent are the following important to your business?

	Not important	Slightly important	Very important	Don't know
a. Ease of access for customers/clients	1	2	3	4
b. Ease of access to markets	1	2	3	4

ASK ONLY IF E1a) =1,2 ELSE GO TO E6

E2 Where are your principal customers / clients located? Code all that apply

Greenwich	1	
Southwark	2	
Bexley	3	
Lewisham	4	
Tower Hamlets	5	
Newham	6	
Barking & Dagenham	7	
Elsewhere in Greater London	8	
South East England Outside London	9	
South West	10	
Midlands	11	
North	12	
Wales	13	
Scotland	14	
Ireland	15	
Rest of Europe	16	
Rest of the World	17	
Don't know	18	

E3 Approximately how many visitors / customers (excluding deliveries) arrive at your site per week?

READ OUT SCALE

NONE	0	GO TO E6
1 – 10	1	
11 – 25	2	
26 – 50	3	
51 – 100	4	
101 – 500	5	
OVER 500	6	
DON'T KNOW	7	
REFUSED	8	

E4 What proportion of visitors / customers do you estimate travel to these premises by car, van or bus? IF UNSURE, ASK TO GUESS

PERCENTAGE	WRITE IN (%)	DK	Refused
A) Car		98	99
B) Van		98	99
C) Bus			

E5 FOR ALL THAT TRAVEL BY CAR OR BUS OR VAN (E4A/B GREATER THAN ZERO) ELSE GO TO E6 What proportion of visitors / customers who travel by car, van or bus travel from across the river in East London to get to these premises?

WRITE IN PERCENTAGE	
Don't know	9

ASK ALL

E6 Approximately how many staff business trips (excluding goods movements) depart from this site per week? IF DON'T KNOW EXACT NUMBER, PROMPT WITH RANGES

NONE	0 - GO TO SECTION F
1 – 10	1
11 – 25	2
26 – 50	3
51 – 100	4
101 – 500	5
501 – 1,000	6
1,001 – 5,000	7
OVER 5,000	8
DON'T KNOW	9
REFUSED	10

ASK IF E6 GREATER THAN ZERO, ELSE GO TO SECTION F

E7 WHAT PROPORTION OF STAFF BUSINESS TRIPS FROM THIS SITE DO YOU ESTIMATE ARE MADE BY CAR, VAN OR BUS?

WRITE IN PERCENTAGE	
a) Car	
b) Van	
c) Bus	
Don't know	9

E8 And what percentage of these trips require crossing the Thames by road in East London? ONLY SHOW THOSE MENTIONED IN E7

WRITE IN PERCENTAGE	
Car	
Van	
Bus	
Don't know	9

F Reliance on Crossing the River Thames in the Silvertown / Blackwall Tunnel area

ASK ALL – READ OUT

F1 Continuing to think specifically about the operation of your business on this site, how important do you consider the following Thames crossings to be for your business (including access to work for your staff)?

Please give your responses on a scale of 1 to 5, where 1 = Not at all important and 5 = Very important.

	Not at all important					Very important					DK
	1	2	3	4	5	1	2	3	4	5	
A_ Tower Bridge	1	2	3	4	5	1	2	3	4	5	6
B_ Rotherhithe Tunnel	1	2	3	4	5	1	2	3	4	5	6
C_ Blackwall Tunnel	1	2	3	4	5	1	2	3	4	5	6
D_ Woolwich Ferry	1	2	3	4	5	1	2	3	4	5	6
E_ Dartford Crossing	1	2	3	4	5	1	2	3	4	5	6

ASK IF MORE THAN ONE F1 A-E = 4, 5, ELSE GO TO F3

F2 Of the Thames crossings that are important, which is the most important to your business at this site?

DP- SHOW ONLY THOSE THAT SCORED 4 OR 5 AT F1. ROTATE. READ OUT

Tower Bridge	1
Rotherhithe Tunnel	2
Blackwall Tunnel	3
Woolwich Ferry	4
Dartford Crossing	5
Dont know / cannot say	6

ASK ALL

F3 Does the current number and capacity of river Crossings in East London act as a barrier to the development of your business at this site across the other side of the river?

Yes	1
No	2
Don't know	3

F4 How predictable (taking into account any predictable delay from everyday congestion) do you think journey times currently are for road traffic crossing the River Thames in the Silvertown / Blackwall Tunnel area?

READ OUT SCALE. - CODE ONE ONLY.

Very poor (unpredictable)	1
Poor	2
Average	3
Good	4
Very good (predictable)	5
Don't know	6

F5 How frequently is your business at this site affected by an unplanned incident that delays traffic at the Blackwall Tunnel (other than everyday congestion)?

Every day	1
3 – 6 times per week	2
Once or twice a week	3
Less than weekly	4
Less than monthly	5
Never	6
Don't know	7

F6 To what extent do the following issues in crossing the River Thames in the Silvertown / Blackwall Tunnel area currently impact on your own business at this site:

READ OUT SCALE. SINGLE CODE IN EACH ROW. ROTATE

	Major disruption / constraint	Moderate disruption / constraint	Minor disruption / constraint	No disruption	Not applicable	DK
A. Daily congestion	1	2	3	4	5	6
B. Additional delay when unplanned incidents happen at river crossings	1	2	3	4	5	6
C. Unpredictability of journey times crossing the river	1	2	3	4	5	6
D. Width and height restrictions at existing river crossings	1	2	3	4	5	6

ASK IF EXPERIENCE ANY MAJOR / MODERATE / MINOR DISRUPTION (F6_A-D=1, 2, 3)

F7 Please explain the consequences of the disruptions to your business at this site:

Code all that apply

Deliveries	
Additional time and associated costs to plan deliveries to avoid congestion	1
Deliveries often need to take longer routes to avoid congestion	2
We need additional staff and vehicles because of time lost to delays	3
Have missed time critical deliveries that have let down clients or affected future business opportunities	4
Business Trips	
Will only cross the river at certain times of the day	5
Can be late for meetings/appointments	6
Will allow longer to travel to meetings/appointments	7
Customers	
Limits number of customers that use our business / Unhappy customers	8
Other (WRITE IN)	9
Don't know	10

F8 How much do the following factors adversely affect your business's profitability during a typical month:? READ OUT , ROTATE

	A lot	Quite a lot	A little	Not at all	Don't Know
Everyday congestion at the Blackwall Tunnel (not including travelling to work)?	1	2	3	4	5
B. Unpredictable incidents at the Blackwall Tunnel	1	2	3	4	5
C Missed time-critical deliveries which have let down clients or affected future business opportunities	1	2	3	4	5
D staff late for meetings / appointments because of congestion across the river	1	2	3	4	5
E Reduced customer base due to poor accessibility via the Blackwall Tunnel	1	2	3	4	5

F9 To the best of your knowledge, how strongly do you agree or disagree with the following statements about staff travel to work at your site... READ out ROTATE

		Strongly Disagree	Disagree	Neither agree, nor disagree	Agree	Strongly agree	DK
A	The Blackwall Tunnel is often congested when I travel to work	1	2	3	4	5	6
B	Congestion at the Blackwall Tunnel affects my ability to get to work	1	2	3	4	5	6
C	I often travel to work earlier to avoid traffic	1	2	3	4	5	6
D	Other staff often start work early to avoid local traffic congestion	1	2	3	4	5	6
E	Other staff are regularly late for work due to local traffic congestion	1	2	3	4	5	6
F	My company has flexible working hours	1	2	3	4	5	6

IF F9_E = 4 or 5 ELSE GO TO F12

F10 How often are staff late for work due to congestion or incidents at the Blackwall Tunnel?

Every day	1
3 – 6 times per week	2
Once or twice a week	3
Less than weekly	4
Less than monthly	5
Never	6
Don't know	7

IF F10= 1-5 ELSE GO TO F12

F11 What do you estimate the annual cost to be to your business of staff being late for work?

WRITE IN VALUE (in £)

ASK ALL

F12 Would your business be likely to operate cross-river more often if crossings in the Blackwall Tunnel / Silvertown area were made more reliable in terms of consistent journey times?

Yes (To a large extent)	1
Yes (To some extent)	2
No difference	3
Don't know	4

G Silvertown Tunnel

READ OUT IN FULL - The Woolwich Ferry is nearing the end of its lifespan and some of the existing tunnels are constrained by height or weight restrictions. The Mayor's Transport Strategy makes a commitment to improving opportunities for road vehicles to cross the River Thames in East London including a new tunnel at Silvertown.

The Silvertown Tunnel;

- Will be a twin-bored 'dual' tunnel,
- Will roughly follow the route of the Emirates Air Line between Greenwich and Silvertown.
- Will provide opportunities for new cross-river bus links, and
- Will provide a new option for crossing the River Thames.

In order to fund the Silvertown Tunnel, some form of charging is expected to be necessary. The charges are likely to be similar to those for the Dartford crossing (which are £2.50 for cars, £3 for two-axle goods vehicles and £6 for HGVs). Charging details and concessions are not yet known, but charging would be 'free flow' rather than using toll booths. Similar arrangements would also be introduced for the Blackwall Tunnel.

G1 What impact do you think a new Silvertown Tunnel with no height restrictions would have on your business at this site, if any?

Strong negative impact	Some negative impact	No impact	Some positive impact	Strong positive impact	Don't Know
1	2	3	4	5	6

G2 Thinking specifically about the potential impact of such improvements on your business, how strongly do you agree or disagree with the following statements

READ OUT EACH STATEMENT AND SINGLE CODE. – ROTATE STATEMENT ORDER

SCALE: STRONGLY DISAGREE (5), SLIGHTLY DISAGREE (4), NEITHER AGREE NOR DISAGREE (3), SLIGHTLY AGREE (2), STRONGLY AGREE (1)

	Strongly disagree			Strongly agree			DK
A The current crossing options are adequate and there is no need to further increase capacity	1	2	3	4	5	6	
B Unpredictable journey times for crossing the river cause loss in revenue at present	1	2	3	4	5	6	
C We would look to alternative routes to avoid the crossing charges, even if it means longer journeys and greater distance travelled	1	2	3	4	5	6	
D My business is not greatly influenced by cross-river traffic so it would have little impact	1	2	3	4	5	6	
E I am happy to pay a toll in line with the Dartford Crossing, if journey times are more reliable	1	2	3	4	5	6	
F The additional costs to the business would make us consider re-locating away from Silvertown / Blackwall.	1	2	3	4	5	6	
G The charges should have smartcard payment options to reduce delays for freight.	1	2	3	4	5	6	

G3 Do you think that the new crossing proposal at Silvertown would impact on the growth of your business / lead to further investment in the business at this site? READ OUT SCALE

<i>Strong negative impact</i>	<i>Some positive impact</i>	<i>No impact</i>	<i>Some negative impact</i>	<i>Strong positive impact</i>	<i>Don't Know</i>
1	2	3	4	5	6

IF G3 = 1 OR 2

G4 Thinking specifically about the potential impact of such improvements on your business at this site, how strongly do you agree or disagree with the following statements.

READ OUT EACH STATEMENT AND SINGLE CODE – ROTATE STATEMENT ORDER

SCALE: STRONGLY DISAGREE (5), SLIGHTLY DISAGREE (4), NEITHER AGREE NOR DISAGREE (3), SLIGHTLY AGREE (2), STRONGLY AGREE (1).

	Strongly agree			Strongly disagree		DK
A The crossing proposal would enable me to take on more staff	1	2	3	4	5	6
B The crossing proposal would increase my potential customer base	1	2	3	4	5	6
C The crossing proposal would reduce the costs to the business from congestion	1	2	3	4	5	6
D The crossing proposal would make business journeys more reliable	1	2	3	4	5	6
E The crossing proposal would make it easier to reach suppliers	1	2	3	4	5	6
E The crossing proposal would make the area more attractive to other businesses	1	2	3	4	5	6

H Permission to re-contact

H1 The interview is now complete. TfL are very interested in what you have to say and it would be helpful to for them to be able to identify comments from organisations taking part in the study. Are you willing for your comments to be attributed to your firm?

[Note: You will be able to change your mind as we will email any quotes for your sign off in advance]

Yes	1	
No	2	

H2 Please can I take a note of your name and where we can contact you for quality control purposes?

Name: RECORD DETAILS OF RESPONDENT WHO COMPLETED INTERVIEW	CATI: DP, IMPORT FROM ID]
Job title:	
Email address: Tel	[CATI: DP, IMPORT FROM TELNUMBER

ASK ALL

H3 We may wish to contact you again to ask how your business is changing over time or to further explore the impacts of the East London River Crossings.

Would you be willing for us to call you back regarding:

This particular study – if we need to clarify any of the information	1	
Other research studies which may be relevant to you	2	
Neither of these	3	

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm my credentials or those of Accent please call the MRS free on 0500.

Appendix B

**TOPLINE DATA – SEVEN BOROUGHES (2013), HAVERING (2014),
OVERALL (2013/14)**

Topline data – Seven boroughs (2013), Havering (2014), Overall (2013/14)

This topline data compares Havering (100 respondents) and the initial seven boroughs (700 respondents) (shown as 'ALL RESPONDENTS 100/700'). The seven London boroughs are: Greenwich, Southwark, Lewisham, Tower Hamlets, Newham, Dagenham, and Bexley. Also shown where applicable are the totals for all eight boroughs. These are labelled as 'Overall'.

It is noted that where data for 'overall' does not sum exactly to that for Havering + 7 Boroughs this is due to rounding following weighting. Both numbers have been checked as correct to the relevant weighted dataset. Nonetheless, for the eight borough results, the total number sometimes rounds differently to the nearest whole number following weighting than in each individual dataset.

A Company Information

Before we discuss the East London River Crossings we would like to ask you some questions about the characteristics of your workplace. This section asks about the size and nature of your business.

A2 – Are any of the following the main activity of your business?

BASE: ALL RESPONDENTS (HAVERING=100 / SEVEN BOROUGHS=700 / OVERALL = 800)	Havering %	7 boroughs %	Overall %
Waste collection, treatment and disposal activities	6%	2%	3%
Land transport and transport via pipelines	2%	1%	1%
Water or Air Transport	-	1%	1%
Warehousing and support activities for transportation	1%	1%	1%
Postal and courier activities	2%	1%	1%
Wholesale trade, except of motor vehicles and	7%	4%	4%
Manufacture	4%	5%	5%
None of the above	78%	84%	84%
Total	100%	100%	100%

A6 Approximately what proportion of staff working at this site do you think travel to work by:

		None	1% - 10%	11% - 25%	26% - 50%	51% - 75%	76% - 99%	100%	Don't know	Total
Walking or cycling	7 Boroughs	52%	7%	17%	13%	5%	1%	4%	1%	100%
	Havering	55%	9%	14%	15%	1%	0%	6%	0%	100%
	Overall	52%	7%	16%	14%	4%	1%	4%	1%	99%
Private road Vehicle*	7 Boroughs	23%	5%	11%	18%	12%	8%	23%	0%	100%
	Havering	13%	1%	8%	16%	15%	14%	34%	0%	100%
	Overall	22%	5%	11%	18%	12%	9%	24%	0%	101%
Public Transport *	7 Boroughs	42%	2%	10%	15%	13%	9%	8%	1%	100%
	Havering	62%	6%	8%	12%	7%	2%	3%	0%	100%
	Overall	44%	3%	10%	14%	12%	8%	7%	1%	99%

BASE: ALL RESPONDENTS (HAVERING 100 / 7 BOROUGHS 700 / OVERALL 800)

* Private road vehicle = Car, Van or Motorcycle

** Public transport = Bus, Tube, Overground Rail, DLR, Passenger Ferry

A7 Approximately what proportion of employees at this site do you think live in each of the following areas:

		None	1% - 10%	11% - 25%	26% - 50%	51% - 75%	76% - 99%	100%	Don't know	Total
Locally*	7 Boroughs	11%	3%	11%	18%	12%	10%	35%	1%	100%
	Havering	5%	1%	4%	12%	18%	15%	46%	0%	100%
	Overall	11%	2%	10%	16%	13%	11%	36%	1%	100%
Elsewhere in G London	7 Boroughs	47%	4%	11%	15%	10%	6%	5%	2%	100%
	Havering	69%	4%	9%	10%	5%	0%	2%	1%	100%
	Overall	50%	4%	11%	14%	9%	5%	5%	2%	100%
Outside G London	7 Boroughs	66%	5%	10%	9%	5%	1%	2%	2%	100%
	Havering	66%	7%	8%	10%	4%	1%	2%	2%	100%
	Overall	66%	5%	10%	9%	5%	1%	2%	2%	100%

BASE: ALL RESPONDENTS (HAVERING 100/ 7 BOROUGHES 700 / OVERALL 800)

* In your borough or a nearby borough. Not across the river

A9 Approximately how many new staff do you typically recruit each year?

[We are interested in the number of new starters]

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
1 – 10	25%	47%	44%
11 – 25	3%	3%	3%
26 – 50	-	1%	1%
51 – 100	0%	0%	-
101+	0%	0%	-
Don't Know	2%	2%	2%
None	69%	45%	48%
Total	100%	100%	98%

A10. Do you experience any difficulty recruiting staff in this location?

Base: All recruiting

BASE: ALL WHO RECRUIT STAFF	Havering n.	7 Boroughs n	Overall n
Yes	6	61	67
No	23	318	341
Don't know	2	3	5
Total	31	382	413

A11. Please explain why you have problems recruiting staff?

BASE: ALL WHO EXPERIENCE DIFFICULTY RECRUITING	Havering n	7 Boroughs n	Overall n
Poor quality applicants	4	32	36
Location of business	1	8	9
Type of work	-	7	7
Low salaries offered	-	4	4
Benefits trap	-	3	3
Company unwilling to spend money on advertising	-	3	3
Antisocial working hours	1	4	5
Applicants require part-time work	-	1	1
Poor transport links	1	13	14
Don't Know	-	1	1
Other	*	5	5
Total	6	81	88

A13. What overall turnover band does work at this site fall into over the last financial year?

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Less than £50,000	26%	19%	20%
£50,001 to £100,000	7%	12%	11%
£100,001 to £500,000	24%	22%	22%
£500,001 to £1m	14%	8%	9%
>£1m to £5m	14%	11%	11%
>£5m to £10m	*	1%	1%
>10m to £20m	1%	1%	1%
>£20m to £100m	0	1%	1%
Over £100m	0	0	0
Don't Know	10%	18%	17%
Refused	5%	7%	7%
Total	100%	100%	100%

A14. Does your business also operate from other sites or premises?

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Yes	37%	54%	52%
No	63%	45%	47%
Don't know	0%	0%	<1%
Total	100%	100%	100%

A15. How many other premises does your business operate from?

BASE: ALL WHO ALSO OPERATE FROM OTHER SITES	Havering n	7 Boroughs n.	Overall n
1 - 2	8	97	105
3 - 10	8	74	82
11 – 20	3	26	29
>20	18	183	201
Don't Know	0	1	1
Total	37	381	418

A16. Where are they located? [All that Apply]

BASE: ALL WHO ALSO OPERATE FROM OTHER SITES (HAVERING =37 / 7 BOROUGHES=381 / OVERALL = 418)	Havering n	7 Boroughs n	Overall n
In same borough	11	98	110
In South London	8	107	115
In East London (North of the Thames)	6	96	102
Elsewhere in Greater London	13	183	195
Elsewhere in the UK	29	224	253
In Europe	6	44	50
Rest of the World	1	43	44
Don't know	0	1	1

B – The last 12 months**B1. Over the last 12 months do you consider your business to have been growing, declining or static in terms of turnover?**

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Growing	44%	45%	45%
Static (about the same)	28%	38%	37%
Declining	21%	13%	14%
Don't know	7%	3%	4%
Refused	*	1%	1%
Total	100%	100%	101%

B2. To what extent has the number of staff you employ at this site changed in comparison to twelve months ago?

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Increased by more than 10%	7%	10%	9%
Increased by up to 10%	16%	13%	13%
TOTAL INCREASE	23%	23%	23%
Stayed about the same	67%	62%	63%
Decreased by up to 10%	3%	7%	6%
Decreased by more than 10%	8%	6%	6%
TOTAL DECREASE	11%	13%	13%
Don't know	0%	2%	2%
Total	100%	100%	101%

B3. To what extent has your turnover at this site changed in comparison to twelve months ago?

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Increased by more than 10%	8%	14%	13%
Increased by up to 10%	26%	24%	24%
TOTAL INCREASE	34%	38%	37%
Stayed about the same	40%	32%	33%
Decreased by up to 10%	7%	9%	8%
Decreased by more than 10%	13%	9%	10%
TOTAL DECREASE	19%	18%	18%
Don't know	4%	11%	10%
Refused	2%	1%	1%
Total	100%	100%	99%

C – Business expectations for the next 12 months

C1. Over the next 12 months do you consider that your business turnover will grow, decline or remain static:

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Grow	53%	62%	61%
Remain static (about the same)	30%	28%	29%
Decline	13%	5%	6%
Don't know	5%	5%	5%
Refused	0%	1%	1%
Total	100%	100%	102%

C2. To what extent do you expect the number of staff you employ at this site to change over the next 12 months?

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Increase by more than 10%	11%	10%	10%
Increase by up to 10%	15%	20%	19%
TOTAL INCREASE	26%	30%	29%
Stay about the same	64%	64%	64%
Decrease by more than 10%	0%	2%	2%
Decrease by up to 10%	5%	2%	2%
TOTAL DECREASE	5%	4%	4%
Don't know	5%	2%	3%
Total	100%	100%	100%

C3. To what extent do you expect your turnover at this site to change over the next 12 months?

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Increase by more than 10%	18%	20%	19%
Increase by up to 10%	33%	36%	36%
TOTAL INCREASE	51%	56%	55%
Stay about the same	32%	31%	31%
Decrease by more than 10%	3%	2%	3%
Decrease by up to 10%	7%	3%	2%
TOTAL DECREASE	10%	5%	5%
Don't know	4%	8%	7%
Refused	2%	1%	1%
Total	100%	100%	99%

C4a. Why do you expect turnover to increase over the next 12 months?

BASE: ALL WHO EXPECT TURNOVER TO INCREASE (HAVERING=51 / 7 BOROUGHES=391 / OVERALL = 443)	Havering n.	7 Boroughs n	Overall n
Economy improving	9	37	46
Sales / trade have increased	8	55	62
Based on projections	8	50	58
Positive changes within the business	-	27	28
Business premises have been refurbished	7	25	33
Increased marketing spend	7	26	33
Change in business strategy / management	4	20	23
We're hopeful of growth	2	18	21
Offer new / better products and services	2	25	27
Sector / industry is growing	2	28	30
Increased interest in business	1	30	31
Increase in staff / better staff	1	25	26
Increased footfall	1	17	18
Area being regenerated	1	19	20
Wider geographical market	1	1	1
Continued demand for our product / services	-	15	15
Brand recognition	-	1	1
Other	3	30	33

C4b. Why do you expect turnover to stay about the same over the next 12 months?

BASE: ALL WHO EXPECT TURNOVER TO STAY THE SAME. (HAVERING=32 / 7 BOROUGHES=217 / OVERALL = 249)	Havering n.	7 Boroughs n	Overall n
Due to the economic climate	9	19	28
Business will remain static (unspecified)	8	47	55
Lack of work / sales available - fluctuating industry	6	18	24
Based on past experience / how the business has been going	4	18	22
More competition	0	13	13
No changes in business strategy / output	0	10	10
Fine the way we are	0	6	6
There are no external factors that will increase or decrease our business	0	4	4
Because of the increase in overheads – need to keep the costs down	0	2	2
Because we are working to a budget	0	2	2
Because we have good staff and recruitment and training have improved	0	3	3
It's dependent on Head Office	0	3	3
It's dependent on the amount of work we get	0	3	3

BASE: ALL WHO EXPECT TURNOVER TO STAY THE SAME. (HAVERING=32 / 7 BOROUGH=217 / OVERALL = 249)	Having n.	7 Boroughs n	Overall n
Lack of government spending	0	3	3
Transport constraints / disruption	0	1	1
We will not be concentrating on growth	2	11	13
Industry / sector slowing down	2	4	6
Limited local market	1	8	9
Not for profit / not profit driven	*	11	11
Other	*	25	25
Don't Know	*	16	16

C4c. Why do you expect turnover to decrease over the next 12 months?

BASE: ALL WHO EXPECT TURNOVER TO DECREASE (HAVERING=10 / 7 BOROUGH=35 / OVERALL 44)	Having n	7 Boroughs n	Overall n
Increased competition	4	6	10
Already seeing a decline	4	4	8
Business is closing / being wound down	2	5	7
Transport constraints / disruption	1	4	5
Reduced footfall	-	5	5
Economic climate	-	4	4
Funding has been cut	-	4	4
Other	*	3	3
Don't know	-	2	2

D – Location

Thinking specifically about your business at this site

D1. Approximately when did your business start operating at this location in [BOROUGH]?:

BASE: ALL RESPONDENTS (100/700/800)	Having %	7 Boroughs %	Overall %
Before 1990	34%	23%	24%
Between 1991 and 2000	23%	17%	18%
Between 2001 and 2010	34%	40%	39%
Since 2010	10%	18%	17%
Total	100%	100%	100%

D2. Which of the following best describes the opening of your premises here?

BASE: ALL BUSINESSES WHO STARTED SINCE 2010 (HAVERING=10 / 7 BOROUGHES =128 / OVERALL =137)	Havering n.	7 Boroughs n.	Overall n
Completely new business when opened here	6	40	46
Business expanding into area (first site in area)	2	29	30
Business relocating into the area	1	22	23
Business expanding within area (additional site in area)	0	17	17
Business relocating within the area	*	20	20
Total	10	128	137

D3. Please describe the three main benefits of your current business location:

Benefits. BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Ease of access by public transport	38%	45%	45%
Ease of access by road (incl. motorways)	37%	20%	22%
Affordability of site / premises	13%	9%	10%
Ease of access by staff	11%	11%	11%
Quality / suitability of current premises	9%	13%	12%
Proximity to businesses in same sector	6%	8%	8%
Proximity to suppliers	5%	3%	4%
Ease of access on foot or by cycle	5%	6%	6%
Anticipated increase in land values	1%	1%	1%
Size of premises	1%	5%	5%
Ease of transport / haulage	1%	3%	3%
Proximity to East London River Crossings	*	1%	1%
Security of lease	*	1%	1%
Availability of appropriately skilled employees	*	1%	1%
Good parking facilities (incl. free)	5%	6%	6%
Close to central London	2%	4%	4%
Close to other businesses (non-sector specific)	6%	10%	10%
Quiet /safe area	*	5%	4%
Proximity to residential areas (market)	11%	3%	4%
Well located for market / footfall	16%	20%	20%
Established / part of local community	2%	5%	4%
Area has been regenerated	1%	2%	2%
Visibility / passing trade	-	6%	6%
Close to tourist attractions	-	2%	2%
Less competition in local area	-	2%	1%
Availability of affordable housing	-	2%	2%
Other	10%	10%	10%
Don't know	8%	6%	7%

D3: Frequency of some key topics of response:

Type of benefits BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
ACCESSIBILITY	57%	60%	59%
SITE SPECIFIC	31%	34%	34%
STAFFING	11%	13%	13%

D4. Please describe the three main weaknesses of your current business location:

Weaknesses BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Poor parking facilities	19%	14%	15%
Local congestion, time wasted in traffic	12%	13%	13%
Difficulty of access by public transport	4%	11%	10%
Remote from markets	7%	8%	8%
Difficulty of access by road	6%	7%	7%
Size of premises	6%	6%	6%
Quality / suitability of current premises	5%	6%	6%
Too much competition from similar business	5%	6%	6%
Not based on a high street (incl. hard to find)	4%	4%	4%
Area run down / in decline	4%	8%	8%
Quiet area (incl. low footfall / lack of passing trade)	3%	7%	6%
Reliability of East London River Crossings	2%	1%	1%
Difficult to access other side of River Thames	2%	2%	2%
Affordability of site / premises	2%	8%	7%
Difficulty attracting staff due to location	2%	*	<1%
Difficulty of transport / haulage	1%	2%	2%
Difficulty recruiting appropriately skilled employees	1%	*	<1%
Reputation of area	-	2%	2%
Difficulty of access on foot	-	1%	<1%
Lack of affordable housing	-	1%	1%
Noisy	-	1%	1%
Security of lease	-	1%	1%
Crime	1%	6%	5%
None / no weaknesses	11%	10%	10%
Other	9%	8%	8%
Don't know	25%	16%	17%

D4: Frequency of some key topics of response:

Type weakness BASE – ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
ACCESSIBILITY	29%	36%	35%
SITE SPECIFIC	12%	23%	22%
STAFFING	3%	1%	2%

D5. I would now like to ask you how important each of the following issues is to the successful running of your business at this site. Please give your responses on a scale of 1 to 5, where 1 = Not at all important and 5 = Very important.

BASE: ALL RESPONDENTS (100/700/800)		Not at all important			Very important		DK
		1	2	3	4	5	6
Characteristics of your Premises [Such as operating space, cost, quality]	Havering	4%	3%	8%	27%	58%	0%
	7 Boroughs	5%	3%	16%	24%	51%	2%
	Overall	5%	3%	15%	24%	51%	2%
Relevant labour and availability	Havering	13%	4%	17%	24%	43%	0%
	7 Boroughs	9%	6%	17%	27%	38%	3%
	Overall	10%	6%	17%	26%	39%	3%
Receiving or dispatching supplies / goods	Havering	14%	7%	18%	17%	44%	0%
	7 Boroughs	17%	9%	16%	19%	36%	3%
	Overall	16%	9%	17%	19%	37%	2%
Ease of access to this site by customers or visitors	Havering	15%	2%	9%	13%	61%	0%
	7 Boroughs	8%	2%	9%	20%	60%	1%
	Overall	9%	2%	9%	19%	60%	1%
Ease of access from this site to customers, clients or markets	Havering	9%	10%	9%	14%	58%	0%
	7 Boroughs	4%	6%	13%	26%	50%	1%
	Overall	5%	7%	13%	24%	51%	1%
Proximity of other companies in the same sector	Havering	33%	18%	15%	16%	18%	2%
	7 Boroughs	22%	17%	23%	17%	17%	4%
	Overall	23%	17%	22%	17%	17%	4%

D5: Summary

BASE: ALL RESPONDENTS (100/700/800)	Important (%)			Neutral / Don't know(%)			Not important (%)		
	Havering	7 boroughs	Over-all	Havering	7 boroughs	Over-all	Havering	7 boroughs	Over-all
Characteristics of your Premises [Such as operating space, cost, quality]	85%	75%	76%	8%	18%	17%	7%	8%	8%
Relevant labour and availability	67%	65%	65%	16%	20%	20%	17%	16%	16%
Receiving or dispatching supplies / goods	61%	55%	56%	0%	19%	19%	21%	26%	25%
Ease of access to this site by customers or visitors	74%	80%	79%	9%	10%	10%	17%	10%	11%
Ease of access from this site to customers, clients or markets	72%	75%	75%	9%	14%	14%	19%	11%	12%
Proximity of other companies in the same sector	33%	34%	34%	17%	28%	26%	50%	38%	40%

D6. To what extent have these issues caused you problems, if at all?

BASE: ALL RESPONDENTS (100/700/800) Scale 1 = no problem at all 5 = very significant problem.		No problem at all		Very significant problem			DK
		1	2	3	4	5	6
Characteristics of your Premises [Such as operating space, cost, quality]	Havering	47%	10%	22%	16%	5%	0%
	7 Boroughs	48%	17%	19%	8%	6%	2%
	Overall	48%	16%	20%	9%	6%	2%
Relevant labour and availability	Havering	59%	12%	20%	6%	3%	0%
	7 Boroughs	48%	19%	19%	8%	4%	2%
	Overall	49%	18%	19%	8%	4%	2%
Receiving or dispatching supplies / goods	Havering	60%	15%	10%	7%	6%	0%
	7 Boroughs	46%	17%	21%	8%	5%	3%
	Overall	48%	19%	16%	8%	7%	2%
Ease of access to this site by customers or visitors	Havering	47%	14%	16%	10%	12%	1%
	7 Boroughs	42%	16%	21%	10%	10%	1%
	Overall	42%	16%	21%	10%	10%	1%
Ease of access from this site to customers, clients or markets	Havering	53%	13%	17%	4%	12%	0%
	7 Boroughs	45%	17%	22%	9%	6%	1%
	Overall	46%	16%	21%	9%	7%	1%
Proximity of other companies in the same sector	Havering	51%	14%	18%	10%	5%	2%
	7 Boroughs	46%	17%	21%	8%	5%	3%
	Overall	47%	16%	21%	8%	5%	3%

D6: Summary

BASE: ALL RESPONDENTS (100/700/800)	Problem (%)			Neutral/don't know (%)			Not a problem (%)		
	Havering	7 boroughs	Over-all %	Havering	7 boroughs	Over-all	Havering	7 boroughs	Over-all
Characteristics of your Premises [Such as operating space, cost, quality]	21%	14%	15%	22%	21%	22%	57%	65%	64%
Relevant labour and availability	9%	12%	12%	22%	21%	21%	71%	67%	67%
Receiving or dispatching supplies / goods	12%	15%	15%	13%	19%	18%	75%	66%	67%
Ease of access to this site by customers or visitors	22%	20%	20%	82%	22%	22%	60%	58%	58%
Ease of access from this site to customers, clients or markets	17%	16%	16%	17%	22%	22%	66%	62%	62%
Proximity of other companies in the same sector	15%	13%	13%	20%	25%	24%	65%	63%	63%

D7. Do you expect your business to move from this site within the next 12 months?

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Yes	8%	8%	8%
No	89%	88%	88%
Don't know	3%	4%	4%
Total	100%	100%	100%

D8. Do you think that there will be a suitable site or premises available to you within South or East London, or have you already found somewhere?

BASE: EXPECT BUSINESS TO MOVE (8) (HAVERING N=8 / 7 BOROUGHES N=58 / OVERALL = 66)	Havering n.	7 Boroughs n	Overall n
Yes, found somewhere within South/East London	2	16	18
Yes, will expect to find suitable premises within South/East London	3	26	30
No, found somewhere outside South/East London	2	2	4
No, do not expect to find suitable premises within South/East London	1	6	6
Not applicable /don't intend to search in this area	*	1	1
Don't know	0	6	6
Total	8	58	66

D9. Why do you say that?

BASE: EXPECT BUSINESS TO MOVE AND KNOW WHERE (HAVERING N=8 / 7 BOROUGHES N=52 / OVERALL N=60)	Havering n.	7 Boroughs n	Overall n
Other	8	18	26
Need to be on same side of river	*	5	5

E – Proximity to firms in the same sector

E1. Please explain why proximity to other firms in the same sector is important to your business?

BASE: PROXIMITY OF OTHER FIRMS IN SAME SECTOR IS IMPORTANT (HAVERING =33 / 7 BOROUGHES =239 / OVERALL =272)	Havering n	7 Boroughs n	Overall n
Keep an eye on the competition	4	60	64
Brings in more trade / customers	5	68	72
Mutual support / networking / collaboration	8	43	51
Provides variety for customers	2	15	16
Good for local area / community	3	13	16
Trade with one another	4	19	23
Contingency / being able to offer customer alternatives at times of peak demand	1	11	12
Important not to be close to competition	3	23	27
Other	5	16	21
Don't know	2	14	16

F – Location of principal competitors

F1. Where are your principal competitors based? Prompt if necessary. Code all that apply.

BASE: ALL RESPONDENTS (100 / 700 / 800)	Havering %	7 Boroughs %	Overall %
Havering	66%	N/A Not Asked	N/A Only asked in Havering
Greenwich	4%	15%	13%
Southwark	4%	14%	13%
Bexley	4%	13%	12%
Lewisham	4%	15%	14%
Tower Hamlets	4%	15%	14%
Newham	3%	15%	13%
Barking & Dagenham	10%	15%	14%
Elsewhere in Greater London	22%	26%	25%
South East England outside London	16%	11%	12%
South West	2%	6%	5%
Midlands	3%	5%	5%
North West	4%	5%	5%
North East	2%	5%	4%
Yorkshire and Humberside	2%	4%	4%
Wales	2%	3%	3%
Scotland	2%	3%	3%
Ireland	0%	2%	2%
Nationwide: UK	6%	N/A	1%
Rest of the World	3%	3%	3%
Don't know	7%	10%	10%
None/Refused	2%	-	<1%

G – Deliveries

G1. Approximately how much of your annual turnover is spent each year on the movement or haulage of goods and materials into and out of this site? (PROPORTION)

RECORD EITHER PERCENTAGE OR VALUE IN GBP

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
None	35%	23%	24%
1% - 10%	15%	24%	23%
11% - 25%	2%	3%	3%
26% - 50%	14%	4%	6%
51% - 75%	2%	1%	1%
76% - 99%	3%	1%	1%
All	1%	1%	1%
Don't know	23%	38%	36%

G1. Approximately how much of your annual turnover is spent each year on the movement or haulage of goods and materials into and out of this site?

RECORD EITHER PERCENTAGE OR VALUE IN GBP

BASE: ALL RESPONDENTS (100 / 700 / 800)	Havering %	7 Boroughs %	Overall %
Less than £500	15%	7%	8%
£501 - £1,000	2%	<1%	<1%
£1,001 - £5,000	2%	1%	1%
£5,001 - £10,000	0%	1%	<1%
More than £10,000	0%	2%	2%
Gave response as percentage*	80%	89%	88%
Total	100%	100%	100%

G2. Do you carry your own goods or use a haulage Company?

CODE ALL THAT APPLY

BASE: ALL WHO MOVE GOODS OR MATERIALS (HAVERING=70 / 7 BOROUGHS = 547 / OVERALL= 617)	Havering %	7 Boroughs %	Overall %
Carry own goods	61%	53%	54%
Use a haulage company	31%	45%	43%
Do not transport goods	14%	14%	14%
Don't know	1%	2%	2%

G3. Where are your principal suppliers located?

PROMPT IF NECESSARY AND CODE ALL THAT APPLY

BASE: ALL ANSWERING (HAVERING=61 / 7 BOROUGHGS 387 / OVERALL=448)	Havering %	7 Boroughs %	Overall %
Havering	27%	N/A	N/A
Greenwich	0%	8%	7%
Southwark	0%	7%	6%
Bexley	0%	8%	6%
Lewisham	0%	6%	7%
Tower Hamlets	0%	8%	7%
Newham	1%	9%	8%
Barking & Dagenham	3%	10%	9%
Elsewhere in Greater London	19%	34%	32%
South East England outside London	25%	23%	23%
South West	3%	10%	9%
Midlands	2%	17%	15%
North West	4%	12%	11%
North East	1%	10%	9%
Yorkshire and Humberside	2%	10%	9%
Wales	3%	6%	5%
Scotland	3%	6%	5%
Ireland	2%	2%	2%

BASE: ALL ANSWERING (HAVERING=61 / 7 BOROUGHES 387 / OVERALL=448)	Havering %	7 Boroughs %	Overall %
Nationwide: UK	12%	-	-
In Europe	6%	5%	5%
Rest of the World	6%	6%	6%
Don't know	12%	15%	15%

G4. Approximately how many inbound deliveries arrive at your site per week?

BASE: ALL FOR WHOM RECEIVING/DISPATCHING SUPPLIES/GOODS IS IMPORTANT (HAVERING =61 / 7 BOROUGHES=387 / OVERALL = 448)	Havering %	7 Boroughs %	Overall %
None	6%	8%	8%
1 – 10	69%	70%	69%
11 – 25	12%	9%	10%
26 – 50	7%	9%	8%
51 - 100	1%	8%	2%
101 – 500	1%	3%	1%
501 – 1,000	1%	0%	0%
1,001 – 5,000	0%	0%	0%
Over 5,000	0%	0%	<1%
Don't Know	3%	2%	2%

G5. And approximately how many outbound deliveries leave your site per week?

BASE: ALL FOR WHOM RECEIVING/DISPATCHING SUPPLIES/GOODS IS IMPORTANT (D5_3=4/5) (HAVERING =61 / 7 BOROUGHES=388 / OVERALL = 448))	Havering %	7 Boroughs %	Overall %
None	40%	35%	35%
1 – 10	38%	44%	43%
11 – 25	5%	5%	4^
26 – 50	6%	5%	6%
51 - 100	0%	5%	4%
101 – 500	6%	3%	3%
501 – 1,000	1%	0%	<1%
1,001 – 5,000	0%	0%	0%
Over 5,000	0%	0%	<1%
Don't Know	3%	3%	3%

H – Problems with deliveries into and out of this site

H1. Please describe the nature of problems you face with deliveries to or from this site?

BASE: ALL FOR WHOM RECEIVING OR DISPATCHING SUPPLIES/GOODS ARE A PROBLEM (HAVERING =12 / 7 BOROUGHGS=107 / OVERALL= 119)	Havering n	7 Boroughs n	Overall n
Congestion locally	*	29	30
Parking	5	37	42
Localised access issues at the site itself	1	18	19
Poor traffic management (e.g. traffic lights)	-	14	14
Congestion more widely (Greater London or beyond)	*	13	13
Issues with finding the site	2	7	9
Delays on the road network due to incidents	-	7	7
Scheduling for deliveries to avoid peak hours (congestion)	2	6	8
Crossing the River Thames	-	4	4
Height limits / restrictions	-	3	3
Availability of labour (e.g. drivers or handlers)	-	2	2
Congestion charge	-	1	1
Other labour factors (e.g. reliability / quality of drivers / handlers)	-	2	2
Reliability of haulage company	-	2	2
Reliability of suppliers	-	2	2
Cost of Haulage	-	1	1
Delivery restrictions due to local residents	-	1	1
Proximity to suppliers	-	1	1
Volume of goods	-	1	1
Weight limits / restrictions	-	1	1
Location of main clients / customers	2	-	2
None	2	9	11
Other	1	4	5
Don't know	-	12	12

H1: Summary

BASE: ALL FOR WHOM RECEIVING OR DISPATCHING SUPPLIES/GOODS ARE A PROBLEM(HAVERING=12 / 7 BOROUGHGS=107 / OVERALL = 119)	Havering No.	7 Boroughs No.	Overall No.
Business-related	0	5	5
Costs-related	0	3	3
Site-related	8	52	60
Staff-related	0	3	3
Traffic-related	3	41	44
Vehicle-related	0	4	4

I – Location of principal customers and clients

11. Where are your principal customers/clients located? Prompt if necessary and code all that apply

BASE: ALL FOR WHOM EASE OF ACCESS TO/FROM SITE IS IMPORTANT (HAVERING=86 / 7 BOROUGHES=600 / OVERALL = 686)	Havering %	7 Boroughs %	Overall %
Havering	66%	N/A	N/A
Greenwich	6%	19%	17%
Southwark	4%	18%	16%
Bexley	4%	19%	17%
Lewisham	4%	21%	18%
Tower Hamlets	5%	18%	16%
Newham	6%	20%	18%
Barking & Dagenham	14%	20%	19%
Elsewhere in Greater London	30%	36%	35%
South East England outside London	22%	17%	18%
South West	1%	7%	7%
Midlands	3%	6%	6%
North West	0%	6%	6%
North East	2%	6%	6%
Yorkshire and Humberside	2%	6%	6%
Wales	3%	4%	4%
Scotland	3%	4%	4%
Ireland	0%	7%	3%
Nationwide: UK	9%	N/A	1%
In Europe	1%	5%	4%
Rest of the World	4%	6%	6%
Don't Know	0%	2%	2%

12. Approximately how many visitors / customers (excluding deliveries) arrive at your site per week?

BASE: ALL FOR WHOM EASE OF ACCESS TO/FROM SITE IS IMPORTANT (HAVERING=86 / 7 BOROUGHES=600 / OVERALL = 686)	Havering %	7 Boroughs %	Overall %
None	16%	9%	10%
1 – 10	24%	20%	20%
11 – 25	6%	6%	6%
26 – 50	4%	12%	11%
51 – 100	14%	12%	12%
101 – 500	16%	19%	18%
501 – 1,000	3%	8%	7%
1,001 – 5,000	11%	8%	9%
Over 5,000	3%	3%	3%
Don't Know	2%	3%	3%
Total	100%	100%	100%

13. What proportion of visitors/customers do you think get to your site by road?

BASE: ALL FOR WHOM EASE OF ACCESS TO/FROM SITE IS IMPORTANT (HAVERING =86 / 7 BOROUGHES =600 / OVERALL =686)	Havering %	7 Boroughs %	Overall %
No visitors / customers	16%	9%	10%
1% - 10%	1%	12%	10%
11% - 25%	3%	8%	7%
26% - 50%	9%	18%	17%
51% - 75%	7%	10%	10%
76% - 99%	22%	16%	17%
All	33%	16%	18%
Don't know	8%	12%	11%
Total	100%	100%	100%

J – Business trips from this site

J1. Approximately how many staff business trips (exec goods movements) depart from your site /week?

BASE: ALL FOR WHOM EASE OF ACCESS FROM SITE TO CUSTOMERS/CLIENTS/MARKETS IS IMPORTANT (HAVERING=72 / 7 BOROUGHES=526 / OVERALL= 598)	Havering %	7 Boroughs %	Overall %
None	46%	47%	46%
1 – 10	41%	35%	35%
11 – 25	6%	8%	7%
26 – 50	3%	4%	4%
51 - 100	1%	3%	3%
101 – 500	0%	2%	2%
501 – 1,000	<1%	0%	<1%
Don't Know	3%	1%	1%
Total	100%	100%	100%

J2. What proportion of staff business trips from your site do you think are made by road vehicle?

BASE: ALL FOR WHOM EASE OF ACCESS FROM SITE TO CUSTOMERS/CLIENTS/MARKETS IS IMPORTANT (HAVERING =72 / 7 BOROUGHES=526 / OVERALL= 598)	Havering %	7 Boroughs %	Overall %
None	13%	5%	6%
1% - 10%	4%	7%	7%
11% - 25%	1%	2%	2%
26% - 50%	13%	5%	6%
51% - 75%	0%	3%	3%
76% - 99%	3%	7%	6%
All	31%	23%	24%
Don't know	1%	2%	2%
No staff business trips	34%	46%	45%
Total	100%	100%	100%

K – Reliance on Crossing the River Thames in East London

K1. Overall, how important is the ability to cross the River Thames in East London to the successful operation of your business in this location?

BASE: ALL RESPONDENTS (100 / 700 / 800)	Havering %	7 Boroughs %	Overall %
Essential	8%	15%	14%
Very important	19%	19%	19%
Important	14%	17%	17%
Slightly important	12%	14%	14%
TOTAL IMPORTANT	53%	65%	64%
Not important	47%	34%	36%
Don't know	0%	1%	1%
Total	100%	100%	100%

K1A. Does the river act as a barrier to the development of your business across the other side?

BASE: ALL RESPONDENTS (100 / 700 / 800)	Havering %	7 Boroughs %	Overall %
Yes	25%	33%	32%
No	75%	64%	66%
Don't know	0%	3%	2%
Total	100%	100%	100%

K2. How predictable do you think journey times currently are for road traffic crossing the River Thames in East London? Read out scale.

BASE: ALL RESPONDENTS (100/700/800)	Havering %	7 Boroughs %	Overall %
Very good	1%	3%	2%
Good	11%	9%	9%
Average	30%	30%	30%
Poor	27%	28%	28%
Very poor	17%	16%	16%
Don't know	14%	14%	14%
Total	100%	100%	100%

K3. To what extent do the following issues in crossing the River Thames in East London currently impact on your own business: Read out scale. Code one in each row.

BASE: ALL RESPONDENTS (100 / 700 / 800)		Major disruption / constraint %	Moderate disruption / constraint %	Minor disruption / constraint %	No disruption %	Not applicable %	Don't Know %
Daily congestion	Havering	22%	22%	14%	20%	22%	0%
	7 Boroughs	24%	21%	20%	21%	13%	1%
	Overall	24%	21%	20%	21%	14%	1%
Additional delay when incidents happen at river crossings	Havering	36%	17%	14%	17%	16%	1%
	7 Boroughs	39%	15%	17%	16%	11%	2%
	Overall	38%	15%	16%	16%	12%	2%
Reliability of journey times crossing the river	Havering	25%	23%	6%	25%	17%	2%
	7 Boroughs	26%	23%	18%	18%	13%	2%
	Overall	26%	23%	16%	19%	14%	2%
Width and height restrictions at existing river crossings	Havering	1%	4%	13%	45%	34%	3%
	7 Boroughs	4%	7%	16%	40%	29%	5%
	Overall	4%	6%	15%	40%	29%	5%
Time needed in planning deliveries to avoid congestion	Havering	12%	14%	10%	30%	31%	2%
	7 Boro	15%	18%	15%	26%	23%	4%
	Overall	14%	17%	15%	27%	24%	4%

K4. Please explain the consequences of these disruptions to your business: Unprompted

BASE: ALL WHO EXPERIENCE ANY MAJOR / MODERATE DISRUPTION (HAVERING=54 / 7 BOROUGHES=421 / OVERALL= 476)	Havering %	7 Boroughs %	Overall %
Can be late for meetings/appointments	54%	46%	47%
Unhappy customers	23%	30%	29%
Need to plan deliveries direct from suppliers where possible	19%	11%	12%
Loss of revenue / business	7%	11%	11%
Costs business money	15%	7%	8%
Loss of man hours	5%	6%	6%
Staff lateness	8%	5%	6%
Late deliveries	8%	4%	5%
Failure to fulfil deliveries / contracts	8%	4%	4%
Losing work to competitors	6%	3%	3%
Will only cross river at certain times of day	3%	3%	3%
Unpredictability of delivery times	5%	1%	2%
Loss of man time as have to leave earlier to make deliveries / appointments	8%	2%	2%
Missed appointments	3%	1%	1%

BASE: ALL WHO EXPERIENCE ANY MAJOR / MODERATE DISRUPTION (HAVERING=54 / 7 BOROUGH=421 / OVERALL= 476)	Havering %	7 Boroughs %	Overall %
Difficult to access business	1%	1%	1%
Don't / Can't trade other side of river	0%	3%	3%
Lack of stock / impact on stock availability	0%	3%	3%
No / Low impact	0%	2%	2%
Don't know	0%	6%	5%
Other	3%	9%	8%

L – East London River Crossings Package

L1A A range of options are being considered. What impact do you think each of the following would have on your business, if any?

	Base (%)	Strongly Positive impact	Some Positive impact	No impact	Some negative impact	Strong negative impact	Don't Know
A new Silvertown Tunnel with no height restrictions	Havering (100)	10%	29%	57%	*	2%	1%
	<i>Bexley (101)</i>	22%	18%	53%	5%	-	2%
	7 Boroughs (700)	23%	21%	51%	2%	1%	3%
	Overall (800)	22%	22%	51%	1%	1%	3%
A new higher capacity Ferry link at Gallions Reach	Havering (100)	7%	22%	59%	6%	2%	3%
	<i>Bexley (101)</i>	15%	27%	49%	3%	3%	4%
	7 Boroughs (700)	13%	23%	57%	2%	2%	2%
	Overall (800)	13%	23%	58%	2%	2%	2%
A new bridge or tunnel at Gallions Reach	Havering (100)	27%	21%	46%	2%	-	3%
	<i>Bexley (101)</i>	31%	25%	36%	4%	-	4%
	7 Boroughs (700)	28%	23%	45%	2%	1%	2%
	Overall (800)	28%	23%	45%	2%	<1%	2%
Replacing the Woolwich ferry with a slightly larger one	Havering (100)	16%	18%	59%	2%	3%	2%
	<i>Bexley (101)</i>	24%	23%	48%	2%	2%	-
	7 Boroughs (700)	16%	21%	58%	2%	2%	1%
	Overall (800)	16%	21%	58%	2%	3%	1%
A new ferry link between Belvedere and Rainham	Havering (100)	32%	23%	34%	4%	3%	5%
	<i>Bexley(54)</i>	17%	40%	35%	6%	-	1%
	Overall (154)	27%	29%	34%	5%	3%	3%
A new bridge or tunnel between Belvedere and Rainham	Havering (100)	53%	17%	25%	4%	-	1%
	<i>Bexley (54)</i>	30%	34%	31%	3%	-	1%
	Overall (154)	45%	23%	27%	4%	-	1%

L1B. Thinking specifically about the potential impact of such improvements on your business, how strongly do you agree or disagree with the following statements.

BASE: ALL RESPONDENTS (%) (100/700/800)		Strongly agree			Strongly disagree		Don't Know
		1	2	3	4	5	6
The current crossing options are adequate and there is no need to further increase capacity	Havering	12%	9%	10%	17%	43%	8%
	7 Boroughs	9%	8%	15%	18%	45%	5%
	Overall	10%	8%	14%	18%	45%	5%
Unpredictable journey times crossing the river cause loss in revenue	Havering	40%	19%	7%	15%	13%	6%
	7 Boroughs	38%	19%	17%	9%	14%	3%
	Overall	38%	19%	16%	10%	14%	3%
If charges were introduced, we would look to take alternative routes to avoid using these crossings, even if this means longer journeys in distance travelled	Havering	21%	14%	15%	20%	25%	5%
	7 Boroughs	16%	19%	20%	19%	23%	3%
	Overall	16%	18%	19%	19%	24%	3%
My business is not greatly influenced by cross river traffic so it would have little impact	Havering	39%	26%	6%	12%	15%	2%
	7 Boroughs	41%	20%	10%	10%	19%	1%
	Overall	41%	21%	9%	10%	18%	1%
I would be happy to pay a charge in line with current Dartford rates if the journey times would be more reliable	Havering	30%	24%	9%	9%	26%	2%
	7 Boroughs	33%	27%	11%	8%	19%	3%
	Overall	32%	27%	10%	8%	20%	3%
Any additional costs would be so significant on the business they would make us consider relocating away from East London	Havering	7%	3%	15%	17%	53%	4%
	7 Boroughs	5%	8%	12%	14%	57%	4%
	Overall	5%	8%	13%	15%	56%	4%
Any charges should have smartcard payment options to reduce delays for freight	Havering	56%	15%	11%	8%	8%	2%
	7 Boroughs	52%	22%	16%	2%	4%	4%
	Overall	52%	21%	15%	3%	5%	3%

L4. From a business perspective, which of the following impacts do you think are likely to happen as a result of the East London River Crossing package? CODE ALL THAT APPLY

BASE: ALL RESPONDENTS (100 / 700 / 800)	Havering %	7 Boroughs %	Overall %
Improve the local economy	84%	83%	83%
Have more predictable journey times	70%	79%	78%
More efficient use of supplies/deliveries	67%	65%	65%
More business coming from other side of the	56%	66%	65%
Staff have more time to enjoy leisure activities	44%	55%	54%
Staff have more reliable working hours	40%	52%	51%
Will recruit additional staff	48%	50%	49%
Expand your business in the area	38%	42%	42%
No impact / none	5%	7%	6%
Less congestion	0%	1%	1%
Improved quality of life factors	<1%	0%	<1%
Less environmental impact / pollution	<1%	0%	<1%

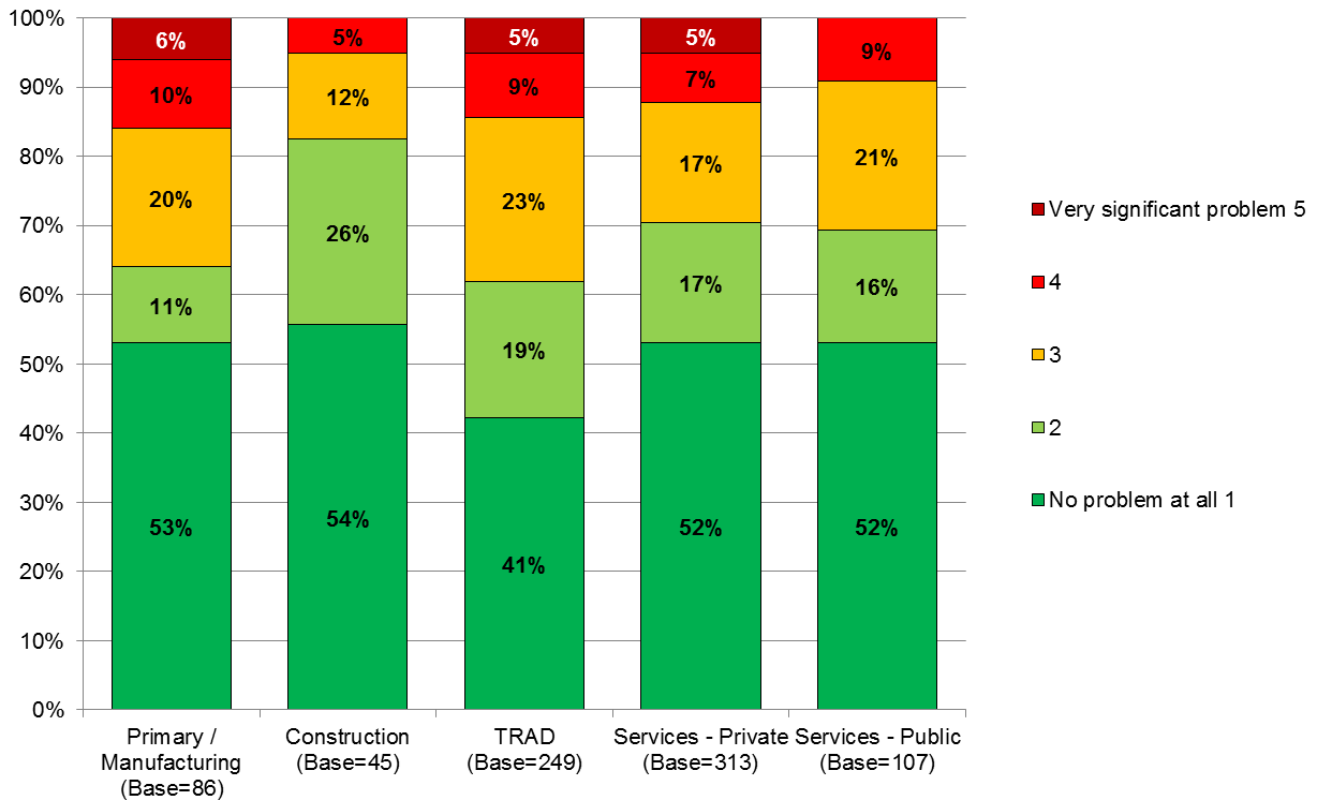
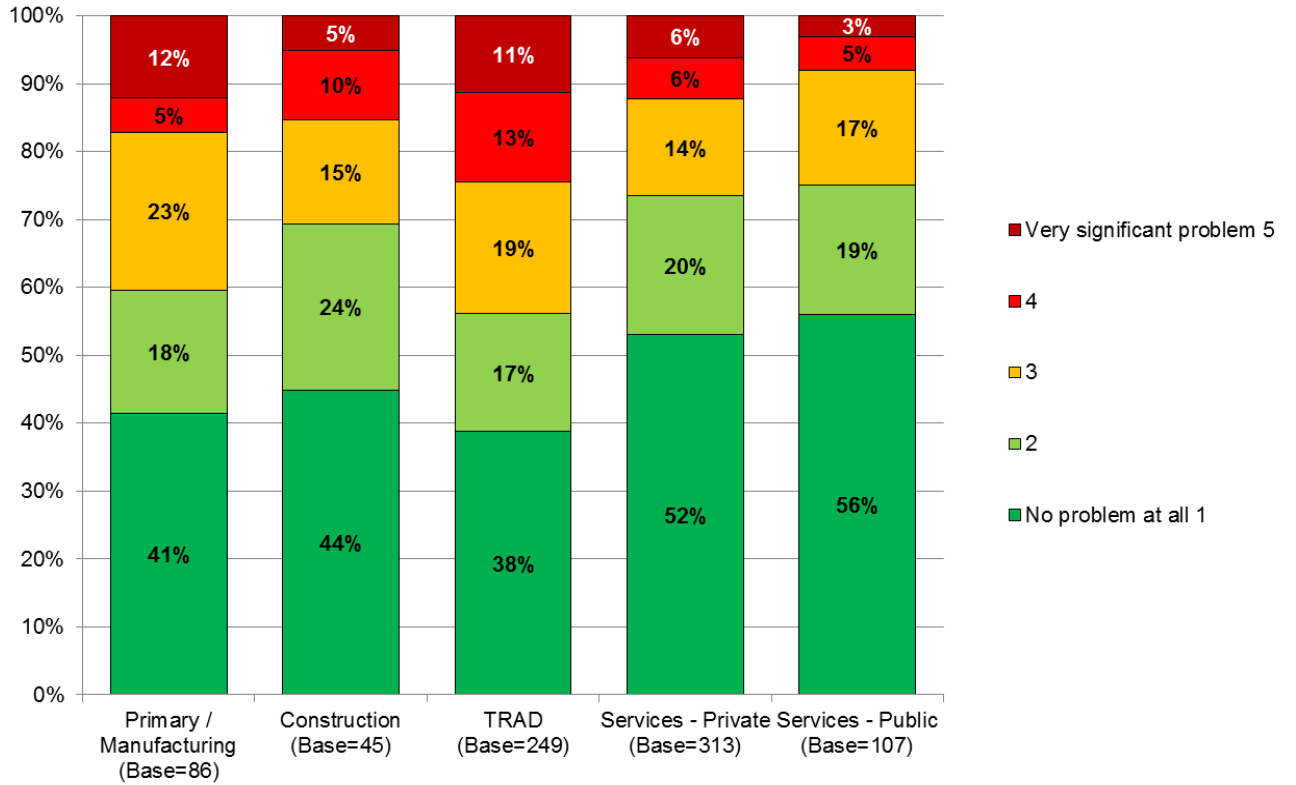
Other	2%	2%	2%
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Appendix C

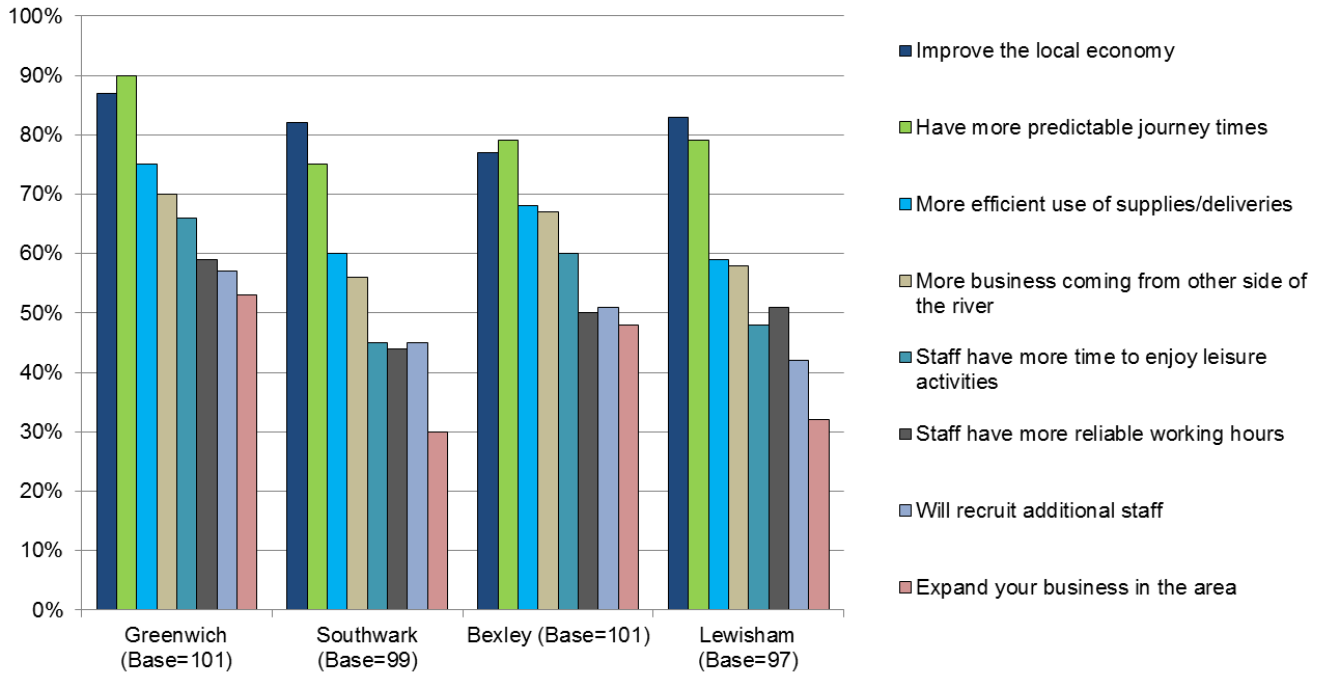
FURTHER ANALYSIS

Further Analysis

D6. Extent to which receiving or dispatching supplies / goods has caused a problem (by sector)



L4. Expected impact from package – South of river



L4. Expected impact from package – North of river

