TRANSPORT FOR LONDON

RIVER CROSSINGS: SILVERTOWN TUNNEL

SUPPORTING TECHNICAL DOCUMENTATION

EAST LONDON RIVER CROSSINGS:

BUSINESS SURVEY

Contractor: WSP/IFF (Task 130)

Client: Andy Rumfitt

29 May 2014

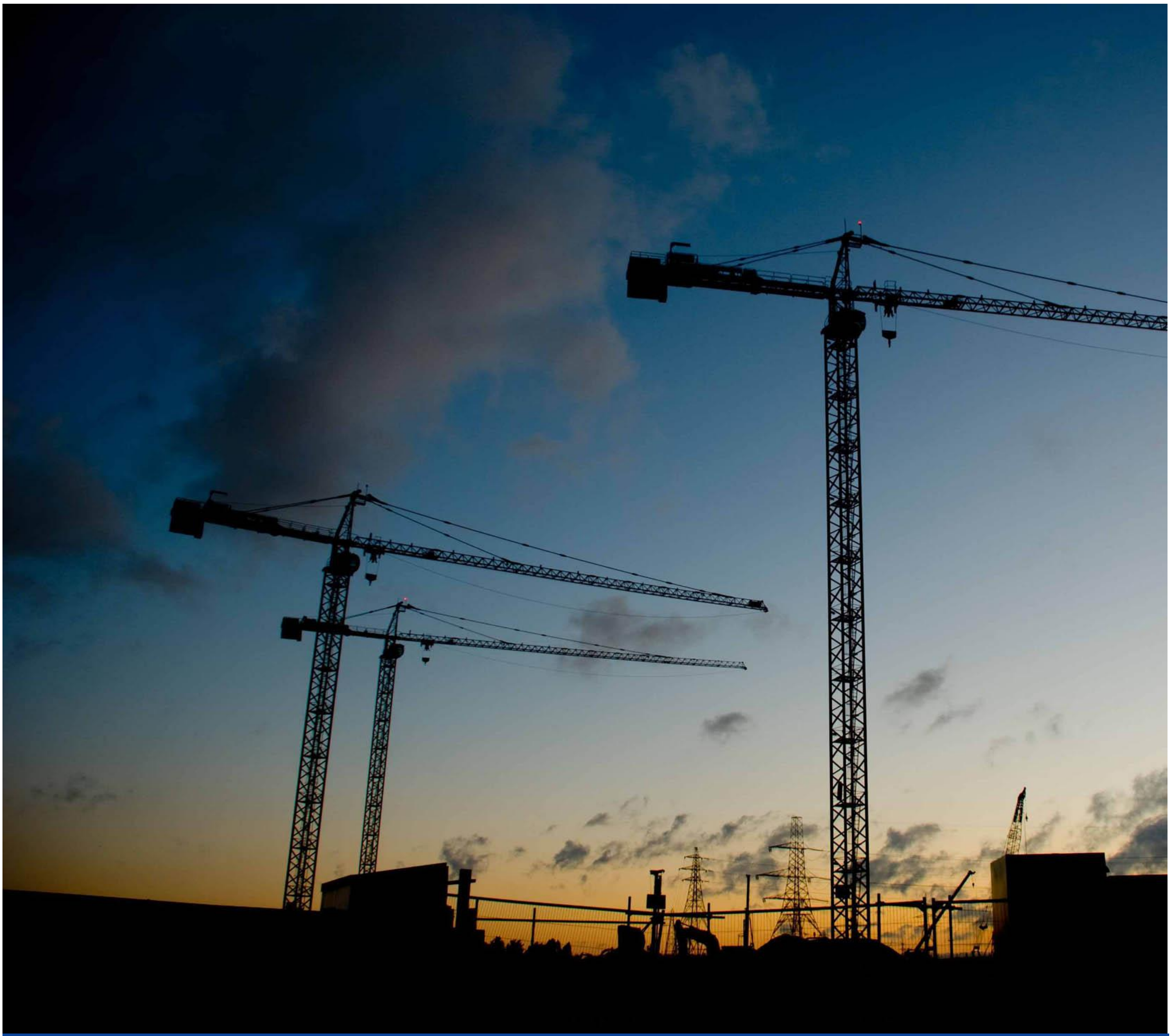
This survey of 800 firms in eight east London Boroughs was undertaken to develop the bespoke evidence base to inform the regeneration case, to comply with WebTAG business questionnaire requirements (Unit 3.5.12) and to gauge business reaction to specific crossing options (as at Autumn 2013).

The survey found that:

- Two thirds of business regard crossing the river as important to their business but only 18% consider the current crossings as adequate.
- Two thirds of firms report that the poor reliability of cross-river travel constrains or disrupts their business operations.
- Over half of all firms would be happy to pay a reasonable charge to cross the river if journey times became more reliable.
- Businesses expect a strong positive effect from the river crossing options: 83% expect it to improve the local economy overall.

This report is part of a wider suite of documents which outline our approach to traffic, environmental, optioneering and engineering disciplines, amongst others. We would like to know if you have any comments on our approach to this work. To give us your views, please respond to our consultation at www.tfl.gov.uk/silvertown-tunnel

Please note that consultation on the Silvertown Tunnel is running from October – December 2014.



TASK 130

East London River Crossings – Business Survey

29/05/2014

Confidentiality:

Quality Management

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TASK 130

East London River Crossings – Business Survey

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1 Executive summary

1.1 Introduction

1.1.1 WSP Group was commissioned by Transport for London (TfL) to undertake a survey of local businesses in east London.

1.1.2 The aims of the research are as follows:

- To meet the evidence base requirements (set out within WebTag) for inputs to a Local Regeneration Report to help underpin the business case for any investment in additional east London River Crossings; and
- To gauge business reaction to the specific consultation proposals under consideration for improving east London River Crossings, to guide further development of the package.

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 stretched and there is a strong need to provide additional capacity to meet this future growth.

1.2.2 Following the consideration of a range of potential options for expanding highway capacity, the proposed East London River Crossings Package (ELRCP) currently consists of a number of shortlisted options. During 2013 these included: a new road tunnel at Silvertown (designed to relieve congestion and improve resilience at the Blackwall Tunnel); a new ferry or fixed link at Gallions Reach; and upgrading of the ageing Woolwich Ferry to increase capacity. A new ferry or fixed link between Belvedere and Rainham is also under consideration.

1.2.3 TfL is currently undertaking a programme of research to explore the impacts and benefits of the proposed options and to support the development of the business case through to planning application. The key objective of this study is to provide a baseline of existing business activity (in terms of characteristics and performance) in the area most likely to be influenced by the proposed ELRCP.

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). Following a decision to add another crossing option (Belvedere to Rainham); the study was extended to cover Havering.

1.3.2 The sampling frame was developed based on data from both the Experian commercial database and the 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 oversampled within the interviews, to capture the views of those likely to be most impacted by the London River Crossings. Businesses of 200+ employees are fewer in number, but employ a more notable proportion of total employees in the area than smaller businesses. After the fieldwork was completed, the data were weighted to be representative of the overall business profile in the study area (both in terms of business sector and size) and therefore 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 3.5.12 requirements and replicated selected questions from the 2007 London Annual Business Survey (LABS), such as business profile and expectation for future development. This was first cognitively tested using depth interviews, with amendments made in advance of further piloting which tested the CATI script and provided further opportunity to reduce open-ended questions with coding frames. Further information on the changes to the questionnaire between the pilots and main stage interviews can be found in WSP's Pilot Survey Report dated 03 October 2013.

1.3.5 Following improvements to the pilot questionnaire, a final questionnaire was agreed with TfL and 700 telephone interviews were undertaken amongst the first seven boroughs by IFF research, on behalf of WSP and TfL, between 24 September and 15 October 2013. Further fieldwork was conducted between 21 and 27 March 2014; telephone interviewing 100 businesses located in the London Borough of Havering, and re-interviewing 54 businesses from Bexley regarding the proposed Belvedere to Rainham crossing options.

1.4 Key findings

1.4.1 Key findings of the research are:

- **Businesses expect a strong positive economic effect from the East London River Crossings Package.** 83% expect it to improve the local economy overall.
- **Improvements to cross-river journeys are seen as important to businesses.** 64% of firms regard the ability to cross the River Thames as important to the successful operation of their business. Only 18% of businesses agree or strongly agree that current crossing options are adequate.
- **The predictability of cross-river journey times is a particular issue.** 65% of firms consider that poor reliability of cross-river travel acts as a constraint on or disruption to their business. 44% of firms think predictability of journey times is poor or very poor, against 12% who regard it as good or very good. This is of most concern to firms in Greenwich (80%) and least for those in Lewisham and Havering (54% each). The majority of firms (78%) anticipate more predictable journey times as a result of the investment package.

A significant number of businesses see the river as a barrier to the development of their business on the other side. Overall around a third of all businesses agreed with this statement, although the level of agreement was higher for businesses in Greenwich (49%), Newham (47%) and Bexley (40%). Should the investment package be implemented, 65% of firms anticipate more business coming from the other side of the river (82% for Newham).

- **Proximity to other businesses is important to a third of firms because it brings in more trade/customers.** This proximity is more important for businesses in Barking and Dagenham (42%) and Newham (41%) and less so in Bexley (28%), Tower Hamlets and Lewisham (30% each).

- **Firms were asked about business prospects on a short-term horizon (a year); therefore the survey reflects current cyclical trends.** There was spare capacity in the local economy at the time of fieldwork (October 2013 / March 2014), given that 61% of businesses expected their turnover to grow over the next 12 months, yet only 29% of businesses considered the number of staff that they employ likely to increase. For those that do recruit (52% businesses), the vast majority (83%) do not have difficulties. This reflects the current state of the post-recession labour market.

- **Longer term recruitment trends are expected to be stronger if the East London River Crossings Package is implemented.** Almost half of businesses (49%) expect to recruit additional staff as a result of the investment, with firms in boroughs closest to the planned new crossings - Greenwich (57%) and Newham (54%) - anticipating the biggest effect. Construction sector businesses are most likely to expect to recruit additional staff (59% think this will occur as a result of the package).

- **Freight and logistics are expected to benefit from the East London River Crossings package.** More efficient use of supplies and deliveries is anticipated by 65% of firms as a result of the package.

- **The construction sector is most concerned about problems crossing the river.** Half of all construction businesses regard crossing the river as essential or very important to their success, compared with c.30-40% for other sectors. The main benefit anticipated by construction businesses is more predictable journey times (86% expect this to result from the investment package).

- **Over half of firms would be happy to pay a reasonable charge to cross the river if journey times became more reliable.** 59% of firms agreed or strongly agreed with this statement. Smartcard payment for freight was supported by 73% of respondents.

1.4.2 The remainder of the report is structured as follows:

- **Section 2 – Introduction:** Provides a *brief overview* of the *East London River Crossings Package* and purpose of the research,

- **Section 3 – Methodology:** Explains the *research methodology*, including interview design, pilot, sampling approach and weighting methodology,

- **Section 4 – 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 5 – Business performance and outlook:** Presents *business expectations* for the next year in terms of *economic outlook,*
- **Section 6 – 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 7 – East London River Crossings Package:** Provides data on businesses' views about, and expectations of, implementation of the *East London Cross River Package*.

2 Introduction

2.1 Project Overview

2.1.1 East London is one of the largest regeneration areas in the UK and this sub-region has the biggest physical capacity for growth in the South East.[1] 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 stretched and there is a strong need to provide additional capacity to meet the needs of this future growth.

2.1.2 TfL is currently completing a programme of research to explore the impacts and benefits of new river crossings in East London to support the development of the business case through to planning application. The key objective of this study is to provide a baseline of existing business activity (in terms of characteristics and performance) in the area most likely to be influenced by the proposed East London River Crossings Package (ELRCP). The study area initially covered the following seven boroughs: Newham, Tower Hamlets, Barking & Dagenham, Greenwich, Bexley, Lewisham and Southwark. Following a decision to add another crossing option, the study was extended to cover Havering.

2.1.3 A range of potential options to increase highway capacity were considered by the initial seven boroughs surveyed in 2013:

- New road tunnel at Silvertown (designed to relieve congestion and improve resilience at the Blackwall Tunnel);
- New ferry or fixed link at Gallions Reach;
- Upgrading of the ageing Woolwich Ferry to increase capacity.

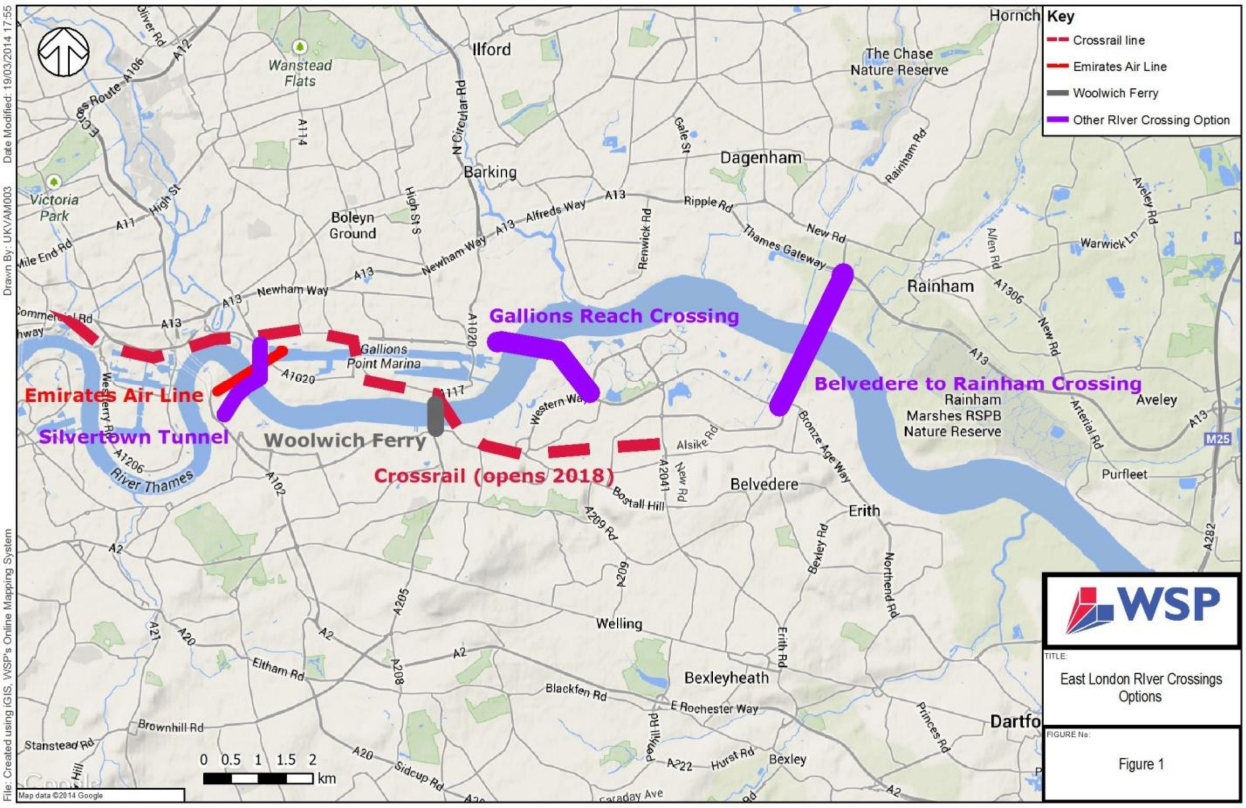
2.1.4 Additional crossing options were also provided for respondents from Havering and those agreeing to be recontacted from Bexley in 2014 covering:

- New bridge or tunnel between Belvedere and Rainham
- New ferry between Belvedere and Rainham.

2.1.5 All river crossing options are shown in Figure 2.1.overleaf

[1] http://www.london.gov.uk/priorities/planning/opportunity-areas/location-londons-opportunity-and-intensification-areas-0.

Figure 2.1: Existing and Potential East London River Crossings



2.2 Survey findings

2.2.1 This report details the findings from 700 business interviews undertaken from 24 September to 15 October 2013, together with those from 100 businesses in Havering interviewed from 21 to 27 March 2014. In addition, 54 businesses from Bexley who were interviewed in 2013 also participated in a short second interview in March 2014 regarding the Belvedere to Rainham crossing options.

2.2.2 Some tables and charts may not add to exactly 100% due to rounding or where respondents have the opportunity to give more than one response. Data in charts refers to percentages unless otherwise specified.

3 Methodology

3.1 Sampling methodology

3.1.1 This section summarises the approach which was taken to sampling businesses, to understand accessibility and other business constraints in East London relating to the proposed East London River Crossings Package.

3.1.2 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 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. 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.

3.1.3 Our chosen source for the site-based sample was the Experian commercial database. This is the largest business database in the UK, containing over 5m records and generated from eight reliable sources, including Companies House, Thomson and Yell Directories, as well as credit references and the London Gazette. The database is subject to continuous updating through telephone contact. While this business database is widely used for sample selection, we note that it may under-represent small businesses and sole traders.

3.1.4 The Experian database was used to obtain a dataset of all business establishments within the study area, defined by:

- Borough of site
- Number of employees
- Business sector (based on 2007 Standard Industry Classification (SIC) codes)

3.1.5 The Experian commercial database and BRES data (Business Register and Employment Survey, Office for National Statistics) show a similar distribution of workplace size in the east London region. For example, 82% of workplaces have 10 employees or less in the Experian dataset, compared to 84% with 0-9 employees in the BRES/Business count data. Appendix A contains a comparison between the BRES/Business count data for 2011 and the Experian dataset.

3.1.6 The BRES/Business count dataset shows that there are 22% more workplaces than enterprises in the study area. As one would expect, this ratio is smaller (14%) for businesses that employ fewer than 10 staff as they are more likely to be single-site enterprises.

3.1.7 The overall profile of all businesses is presented in Table 3.1 while Table 3.2 identifies sector mix by borough.

Table 3.1: Profile of businesses in the east London survey boroughs*

SIC 2007 sector	1-10 employees	11-49 employees	50-199 employees	200+ employees	Total
Primary/Manufacturing	1621	278	46	13	1958
Construction	1765	183	27	8	1983
Transport, Retail and Distribution (TRAD)	8583	1126	266	68	10043
Services	18167	3557	1032	236	22992
Total	**30136**	**5144**	**1371**	**325**	**36976**
Percentage of Total	**81%**	**14%**	**4%**	**1%**	**100%**

*Source = Experian establishment database 2013

Table 3.2: Business profile by borough*

	Tower Hamlets	Newham	Barking & Dagenham	Havering	Southwark	Lewisham	Greenwich	Bexley	Total
Primary /Manufacturing	3%	4%	8%	12%	4%	5%	6%	9%	**6%**
Construction	3%	3%	7%	6%	3%	6%	7%	11%	**5%**
Transport, Retail and Distribution (TRAD)	29%	34%	31%	30%	23%	26%	24%	25%	**27%**
Services	65%	58%	54%	52%	70%	63%	63%	55%	**61%**
Total	100%	100%	100%	100%	100%	100%	100%	100%	**100%**

*Source = Experian establishment database 2013

3.1.8 In order to understand the relative importance of accessibility compared to other business constraints, a number of additional interviews were undertaken with businesses in sectors which were identified as 'transport dependent'[2], as these will be more impacted by cross river constraints and have potentially most to gain from the ELRCP. For this reason, manufacturing businesses were oversampled at the expense of the service sector and firms with SIC (Standard Industry Classification) codes which have transport-dependent activity were prioritised, as shown below in Table 3.3 (prioritised sectors are coloured in blue).

[2] Source: London River Crossings. Regeneration Impacts Scoping Report. Chapter 4. SDG 2012.

Table 3.3: SIC code sample reference

Sector	Definition by section from SIC 2007	SIC Codes	Prioritised SIC codes within industry sector
Primary/ Manufacturing	A – Agriculture	1 - 3	
	B – Mining and quarrying	5 - 9	
	C – Manufacturing	10 - 33	all
Construction	F – Construction	41 - 43	all
Transport, Retail and Dis-tribution (TRAD)	D - Electricity, gas, steam and air con.	35	
	E – Waste supply, sewerage etc.	36 - 39	38 waste collection
	G – Wholesale and retail	45 - 47	all, exc. 45- automotive
	H – Transport	49 - 53	all
Services	I – Accommodation and food service	55 - 56	all
	J – Information and communications	58 - 63	
	K – Finance and insurance	64 - 66	
	L – Real Estate	68	
	M – Professional, scientific and technical	69 - 75	
	N – Admin and support	77 - 82	all
	O – Public admin/defence: social security	84,85.1 -.4	84.1, 84.2 public services
	P – Education	85.5 -.6	
	Q – Health and social care	86 - 88	86.1 -.2 healthcare/hospitals
	R – Arts	90 - 93	
	S – Other	94 -96	

3.1.9 While it is known from the BRES data that approximately 40% of employees work in workplaces with 200 or more employees, these sites represent just one per cent of all workplaces in East London. In conducting B2B (business to business) research, a ratio of at least 1:15 is normally used to achieve a target sample size. Therefore, with 325 businesses employing 200+ staff, this would suggest an achievable sample size of 21 completed interviews. With this constraint in mind, WSP constructed a sampling framework that sought to maximise the number of large businesses sampled and correspondingly down-weight the number of businesses employing 10 or fewer staff.

3.1.10 Public sector organisations were believed likely to have different needs to private sector organisations and were 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 = c.90). This is shown in Table 3.4.

Table 3.4: Sample profile

<table>
<tr><th colspan="2">SIC 2007 sector</th><th>1-10 employees</th><th>11-49 employees</th><th>50-199 employees</th><th>200+ employees</th><th>Total</th></tr>
<tr><td colspan="2">Primary / Manufacturing</td><td>80</td><td>16</td><td>0</td><td>0</td><td>96</td></tr>
<tr><td colspan="2">Construction</td><td>40</td><td>8</td><td>0</td><td>0</td><td>48</td></tr>
<tr><td colspan="2">Transport, Retail and Distribution (TRAD)</td><td>160</td><td>56</td><td>16</td><td>8</td><td>240</td></tr>
<tr><td rowspan="2">Services</td><td>Private</td><td>144</td><td>120</td><td>40</td><td rowspan="2">16*</td><td rowspan="2">416</td></tr>
<tr><td>Public</td><td>40</td><td>40</td><td>16</td></tr>
<tr><td colspan="2">Total</td><td>464</td><td>240</td><td>72</td><td>24</td><td>800</td></tr>
</table>

* Sample size too small for services to be further sub divided into public and private.

3.1.11 The sample was further stratified by borough to achieve 100 interviews per borough, as illustrated in Table 3.5. The same target breakdown of sector and business size was sought per borough in line with the overall sample, rather than a borough-specific profile for each area.

Table 3.5: Borough sample frame

Sector		Size	
Primary / Manufacturing	12	1-10 employees	58
Construction	6	11-49 employees	31
Transport, Retail and Distribution (TRAD)	30	50-199 employees	9
Services	52	200+ employees	2
Total	**100**		**100**

3.2 Sample selection

3.2.1 The sample database was stratified by sector and within each sector by business size. The prioritised SIC codes/sections identified in Table 3.2 were moved to the top of each sector file, ensuring all these businesses were targeted first. All prioritised companies were contacted at least once before a sample of the remaining businesses within each sector/business size were attempted to be contacted, subject to quota.

3.2.2 Given that a purely random sample was not drawn (i.e. drawing every nth business proportional to the total number of contacts N, where n= N/sample size), statistical confidence levels cannot be provided for the raw data collected through the fieldwork, since the profile of the sample was to a degree pre-determined not to be totally representative of the universe. The exception would be sectors where no prioritisation took place (e.g. the construction sector). Nonetheless, to address this issue for the data analysis, the resultant dataset was weighted accordingly, to be representative of the overall business profile. This enabled standard statistical calculation of confidence levels to be applied.

3.3 Questionnaire development and pilot

3.3.1 A questionnaire was drafted by WSP with input from Albion Economics and in consultation with TfL. The questionnaire contained a number of sections and asked first about general business characteristics; operations (size of workforce, reliance and scale of movement associated with operations – such as volume of supplies, deliveries, visitor arrivals – and whether carry own freight or use a haulage company); geographical operations (e.g. single or multi-site, location of principal competitors and principal suppliers, staff catchments, markets etc.); site situation (strengths and weaknesses of current business location); and market expectations over the coming year. It then continued to ask generally about reliance on cross river transport and then specifically about views on the ELRCP.

Depth interviews

3.3.2 A series of four depth interviews were conducted by telephone, following initial recruitment and email confirmation of the interview with background details of the ELRCP including a map. Interviews were conducted between 3-5 September 2013, amongst the following types of business:

- SME import/export business, Dagenham, Food distribution across UK, employs 30 staff;
- Freight operator, Newham, employs 35 staff;
- Small wholesaler, Bexley, employs 3 staff; and
- Manufacturer, Greenwich, small new business with 2 employees.

3.3.3 Interviews ranged from approximately 30 to 50 minutes and were digitally recorded. Insights from the depth interviews were used to enhance the questionnaire for CATI piloting.

CATI Pilot

3.3.4 A sample of approximately 50 businesses (separate from the main sample) was then compiled from which 15 CATI interviews were conducted during the period from 9 to 10 September 2013. Interview lengths varied from 15 to 29 minutes with an average interview length of 21 minutes.

3.3.5 Interviewers reported that businesses located within certain boroughs were less willing to take part. They cited that those located far away from the river yet still within a borough (i.e. Bexley) did not necessarily see the relevance of the survey.

3.3.6 WSP therefore provided additional variables for inclusion in the final dataset. These were linked to the distance that businesses are located from each of the three proposed East London River Crossing options (Silvertown Tunnel, Woolwich Ferry, and Gallions Reach Ferry). Similarly, in 2014, a variable based on distance from the Belvedere-Rainham crossing has also been added. This has enabled further exploration of the influence that distance from the proposed crossings is found to have on attitudes to them.

Final questionnaire

3.3.7 The findings of both the depth interviews and the CATI pilot (including debrief with the interviewers) were used to make several changes to the pilot questionnaire. These are summarised in WSP's Pilot report dated 3 October 2013.

3.3.8 The final questionnaire maintained the same structure as the pilot questionnaire and 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,
- Whether the business is primarily involved with a transport-dependent activity,
- Proportion of staff believed to travel to work in different ways,
- Approximate proportion of employees commuting from different areas,
- 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),
- Single or multi-site and where other sites are located.

- **B – The last 12 months:**
  - Whether business has been growing, declining or static,
  - Change in employee numbers,
  - Change in turnover.

- **C – 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, direction and extent),
  - Expected change in turnover (extent),
  - Reasons for anticipating these changes.

- **D – Location:**
  - When the business started trading in this location,
  - (If opened since 2010) Nature of business opening here, e.g. new business, relocation, expansion etc.,
  - Three main benefits of business location,
  - Three main weaknesses of business location,
  - Importance of various characteristics to successful operation of the business (e.g. characteristics of premises, 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.

- **E – Proximity to firms in the same sector:**
  - (If previously stated this is important to them) Why this is important.

- **F – Location of principal competitors**
  - Where principal competitors are based.

- **G – Deliveries**
  - Annual spend (% of turnover or £) on haulage / deliveries,
  - Whether carry own goods, use a haulage company, both or neither,
  - Where principal suppliers are located,
  - Number of inbound deliveries per week,
  - Number of outbound deliveries per week.

- **H – Problems with deliveries into and out of site**
  - Nature of any problems (if previously stated this causes them problems).

- **I – Location of principal customers and clients** (If ease of access to /from site is important)
  - Where principal clients / customers / markets are located,
  - Approximate number of visitors / customers arriving at site each week (excluding deliveries),
  - Approximate proportion of visitors / customers believed to arrive by road.

- **J – Business trips from the site:** (If ease of access to customers/clients/markets is important)
  - Approximate number of staff business trips from the site (excluding goods movements) per week,
  - Approximate proportion of staff business trips undertaken by road.

- **K – Reliance on crossing the River Thames in East London**
  - Overall how important is crossing the river in East London to successful operation of the business,
  - Whether the river acts as a barrier to the development of business across the other side,
  - Extent various cross-river transport issues currently impact business operations,
  - Consequences of these impacts.

- **L – Views on the East London River Crossings Package (ELRCP)**
  - Level of support for different elements of the potential package,
  - Extent of agreement with a number of statements about the potential impact of the package being (or not being) delivered to their business (e.g. how strongly agree or disagree),
  - Whether businesses consider various outcomes as likely to occur (e.g. improve the local economy) as a result of delivery of the package.

3.3.9 A copy of the final CATI (Computer Assisted Telephone Interviewing) scripted questionnaire for 2013 can be found at **Appendix B,** including the additional river crossing options asked of Havering and Bexley in 2014 (marked accordingly). A covering email was prepared which could be issued to any businesses wanting additional information about, or introduction to, the study. Businesses could also seek further information or reassurance from WSP or TfL should they wish to do so.

3.4 Fieldwork and sample profile

3.4.1 Initial fieldwork covering seven boroughs was conducted by CATI between 24 September and15 October 2013 inclusive, with an average interview length of 20 minutes. Havering fieldwork and supplementary Bexley interviews were conducted between 21 March and 27 March 2014, with an average interview length for the Havering businesses of 23 minutes and for the Bexley re-interviews of five minutes.

3.4.2 The profile of the achieved sample is summarised in Table 3.6, overleaf.

Table 3.6: Sample profile

		Borough								Total	
		Greenwich	Southwark	Bexley	Lewisham	Tower Hamlets	Newham	Barking and Dagenham	Havering	Weighted	Un-weighted
Size											
	1 - 10	81	80	83	79	80	82	83	81	649	464
		80%	80%	82%	81%	81%	81%	82%	81%		
	11 - 49	14	14	14%	14	14	14	13	14	111	248
		14%	14%	14%	15%	14%	14%	13%	14%		
	50 - 199	4	5	3	3	4	4	5	4	32	69
		4%	5%	3%	3%	4%	4%	4%	4%		
	200+	1	1	1	1	1	1	1	1	8	19
		1%	1%	1%	1%	1%	1%	1%	1%		
Sector											
	Primary / Manufacturing	6	3	6	5	5	5	6	5	41	86
		6%	3%	6%	5%	5%	5%	6%	5%		
	Construction	5	6	6	6	6	6	6	6	47	45
		5%	6%	6%	6%	6%	6%	6%	6%		
	TRAD	26	29	29	25	27	26	27	27	216	249
		26%	29%	29%	26%	27%	26%	27%	27%		
	Services (All)	64	62	60	61	61	64	62	62	496	420
		64%	62%	59%	63%	62%	63%	61%	62%		
Within Services	**Services (Private)**	49	49	47	47	47	51	46	48	385	313
		48%	49%	47%	48%	48%	50%	45%	48%		
	Services (Public)	15	14	13	15	14	13	16	14	111	107
		15%	14%	13%	15%	14%	13%	16%	14%		
	Total (weighted)	**100**	**100**	**101**	**98**	**99**	**101**	**101**	**100**	**800**	
	Total (un-weighted)	**101**	**99**	**101**	**97**	**98**	**102**	**102**	**100**	**800**	

3.4.3 A summary of the top-line data can be found in **Appendix C**. Key findings are briefly summarised in the remainder of this report, with supplementary data tables in **Appendix D**.

3.4.4 As an illustration, the following provides a portrait of a typical East London business:

- Sole premises operating in the service sector with 5 staff, opening in 2004
- No staff recruited in the last 12 months, but turnover has increased and is expected to do so in the coming year. No further staff are planned to be recruited but the business does not find it difficult to attract good staff.
- The main benefit of the site is being close to public transport, with buses and the DLR being within a couple of minutes' walk. Access to public transport is important, both for staff travelling to/from work and also for access by customers and to clients.
- Parking is the main problem with the current location, especially for deliveries.
- A quarter of their suppliers are located in adjacent boroughs in East London, with another quarter within Greater London.

4 Business profile and operations

Key findings:

Businesses are currently more concerned about accessibility than site-specific characteristics or staffing.
59% of businesses noted at least one benefit relating to accessibility and 35% noted at least one weakness. In comparison only 13% noted strengths associated with staffing issues, whilst just two per cent reported difficulties with staffing.

The greatest weaknesses of business location vary by borough
'Congestion and time wasted in traffic' and 'poor parking facilities' are the main concerns relating to business location. Congestion is a particular issue for businesses in Greenwich (21%) and Lewisham (15%), as well as for the Construction and Primary / Manufacturing sectors (21% businesses in each sector). Firms in Southwark, Barking & Dagenham (21% each) and Havering (19%) are more concerned about poor parking facilities .Bexley businesses report that they are remote from markets (15%) and affordability of sites and premises is the biggest concern in Tower Hamlets (18%). In Newham, difficulty of access by public transport (16%) and crime (12%) feature more significantly than they do elsewhere

The most frequently reported reason for businesses to say that proximity to other firms is important to them, is because it brings in more trade/customers.
This benefit of proximity to other businesses is most important for businesses in Tower Hamlets, Newham and Greenwich.

4.1 Introduction

4.1.1 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 road transport,
- Levels of movement associated with business operation, including:
  - Staff,
  - Suppliers,
  - Deliveries,
  - Customers.
- Locations of principal suppliers,
- Locations of principal competitors.

4.1.2 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),
- Year premises opened (since 2010; 2001 – 2010; 1991 – 2000; before 1990),
- 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, Havering, Southwark, Lewisham, Greenwich, Bexley),
- Side of the river (north / south),
- Distance from Silvertown Crossing, Woolwich Ferry and Gallions Reach (0-6km; >6km).

4.2 Benefits of business location

4.2.1 A total of 1,619 comments were given when businesses were asked to identify the main benefits of their current location, representing an average of two comments per respondent.

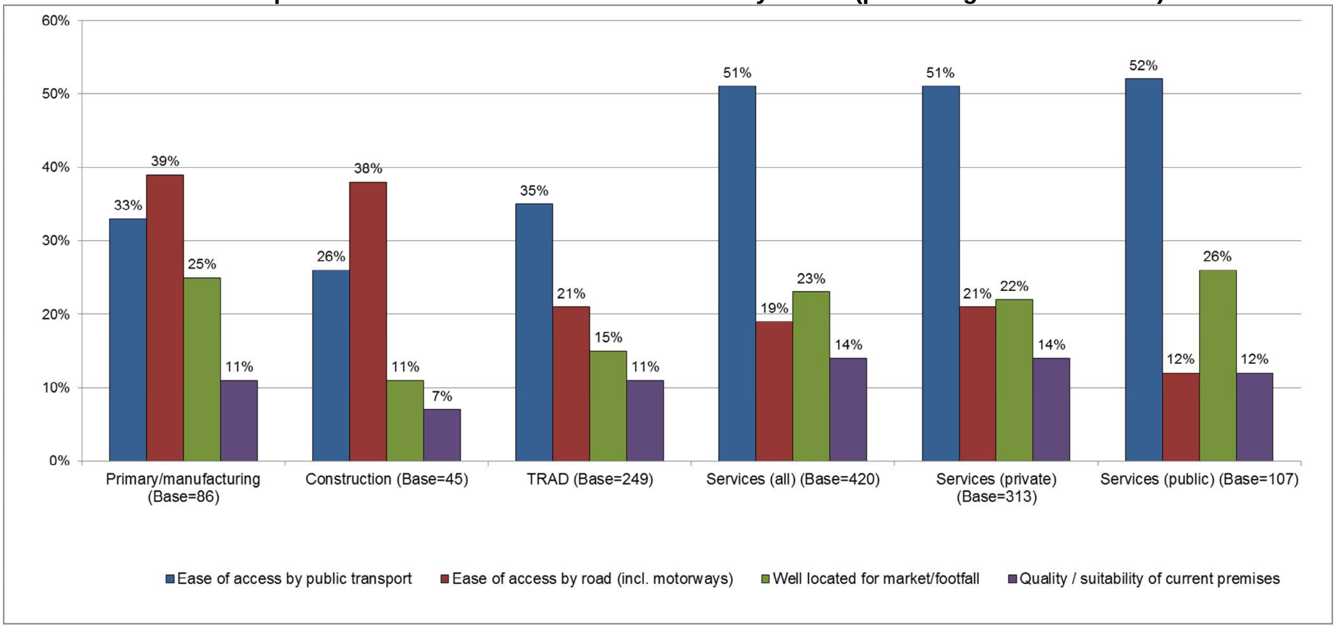
4.2.2 The top four benefits identified overall were:

- Ease of access by public transport (45%)
- Ease of access by road, inc. motorways (22%)
- Well located for market / footfall (20%)
- Quality / suitability of current premises (12%)

4.2.3 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 4.1 (overleaf).

4.2.4 Ease of access by public transport is most relevant to the service (51%), TRAD (35%) and manufacturing sectors (34%), while construction firms (39%) are more focused on road access (43%). Primary and manufacturing businesses also report access by road as being important (38%).

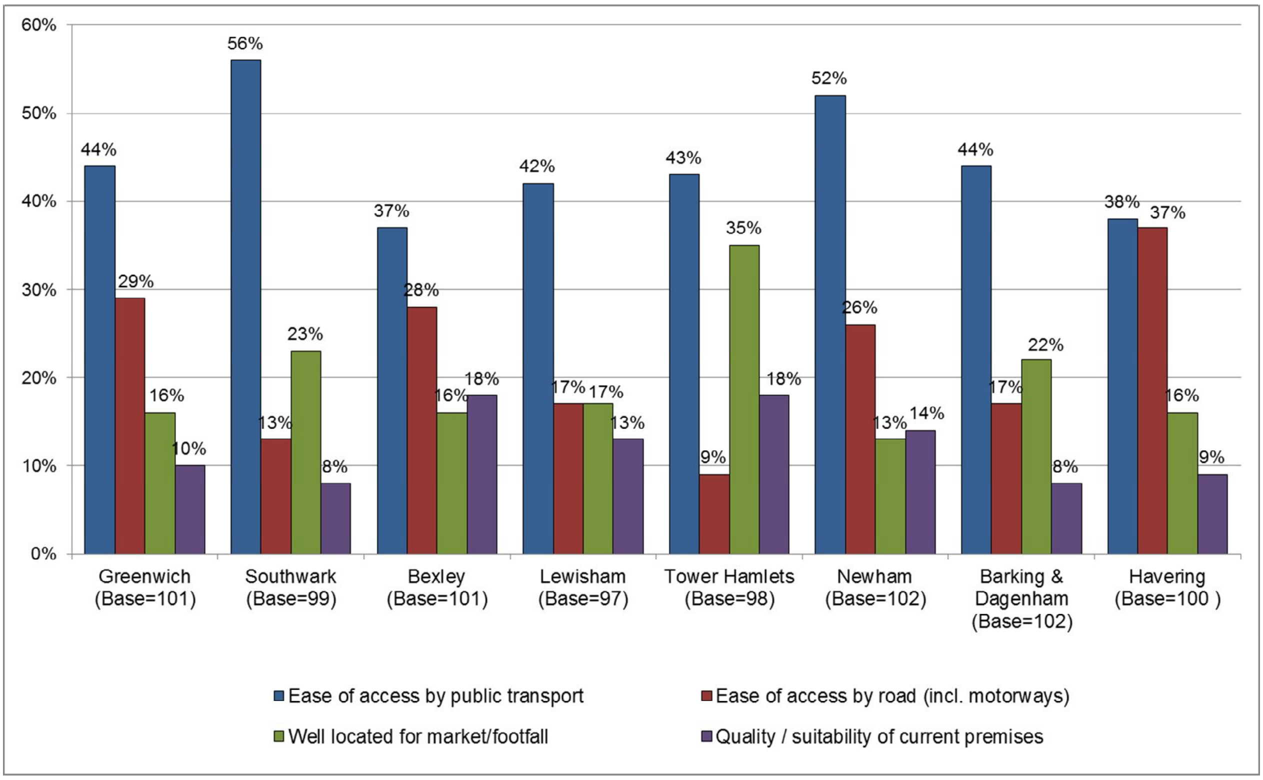
Chart 4.1: Top 4 benefits of current business location by sector (percentage of businesses)



4.2.5 Public transport access is also the primary focus of business location across all seven boroughs (37-56% as shown in Chart 4.2), with ease of access by road being of greatest value to those trading in Havering (37%), Bexley (29%), Greenwich (29%) and Newham (26%).

4.2.6 Being well located for footfall/market is most relevant to businesses in Tower Hamlets (35%), public sector service organisations (26%) and primary / manufacturing businesses (25%).

Chart 4.2: Top 4 benefits of current business location by borough (percentage of businesses)



4.3 Weaknesses of business location

4.3.1 Businesses also provided details of the weaknesses of their current location, with a total of 1,048 comments given. The range of location-related weaknesses is greater than that for strengths, with just over a third (35%) citing issues relating to accessibility and 22% noting site-specific issues.

4.3.2 The main disadvantages of current business locations are as follows:

- Poor parking facilities (15%)
- Local congestion, time wasted in traffic (13%)
- Difficulty of access by public transport (10%)
- Remote from markets (8%)
- Area is run down / in decline (8%)
- Difficulty of access by road (7%)
- Affordability of site / premises (7%)

4.3.3 In all sectors except services, the most frequently quoted weakness of location is local congestion and time wasted in traffic (15% – 21%), while service sector organisations, particularly public service sector organisations (21%),are most concerned over poor parking facilities (13% for private service organisations). Comparison by sector and borough are shown below in Charts 4.3 and 4.4.

Chart 4.3: Top four weaknesses of current business location by sector

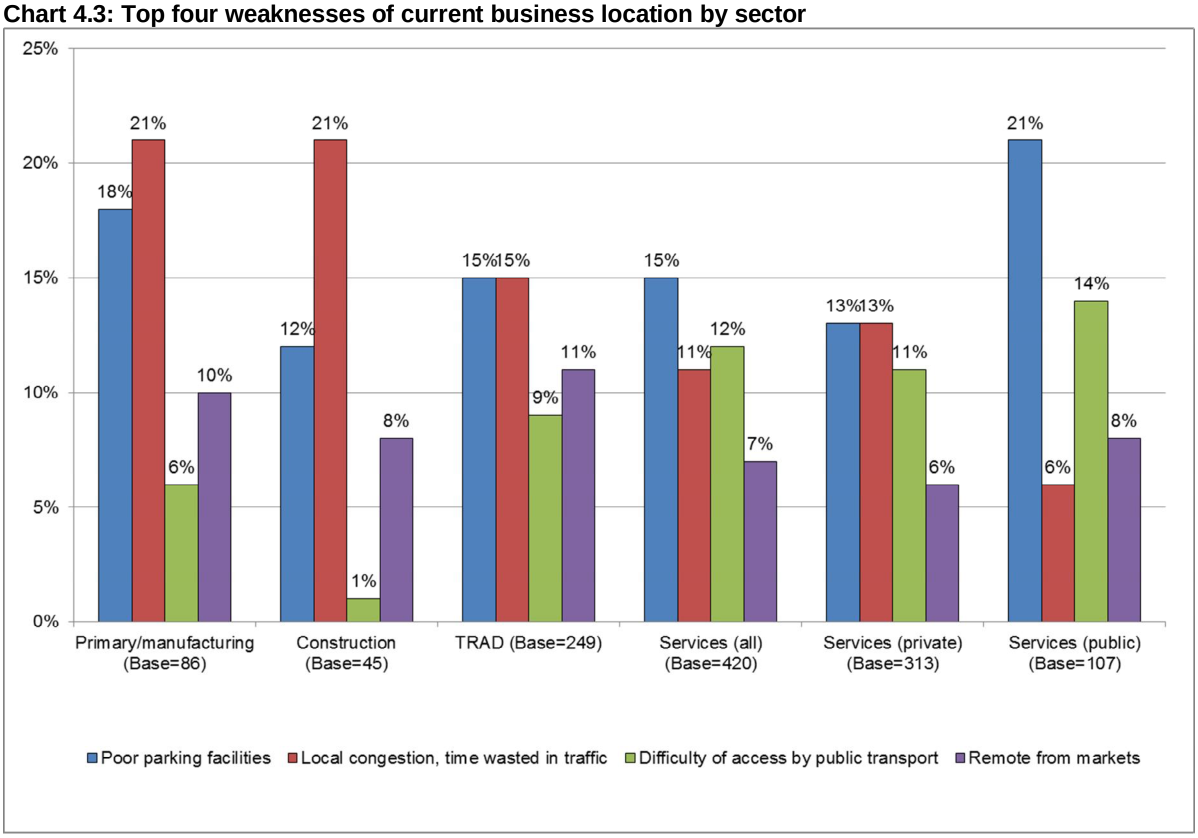
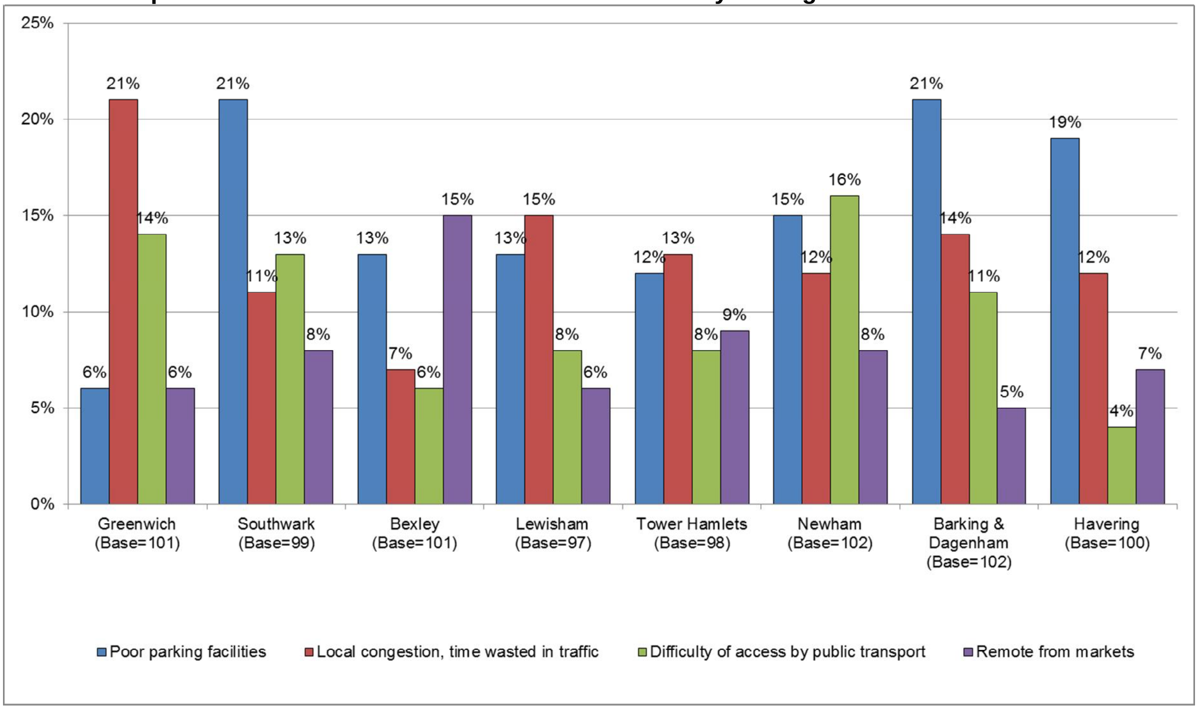


Chart 4.4: Top four weaknesses of current business location by borough



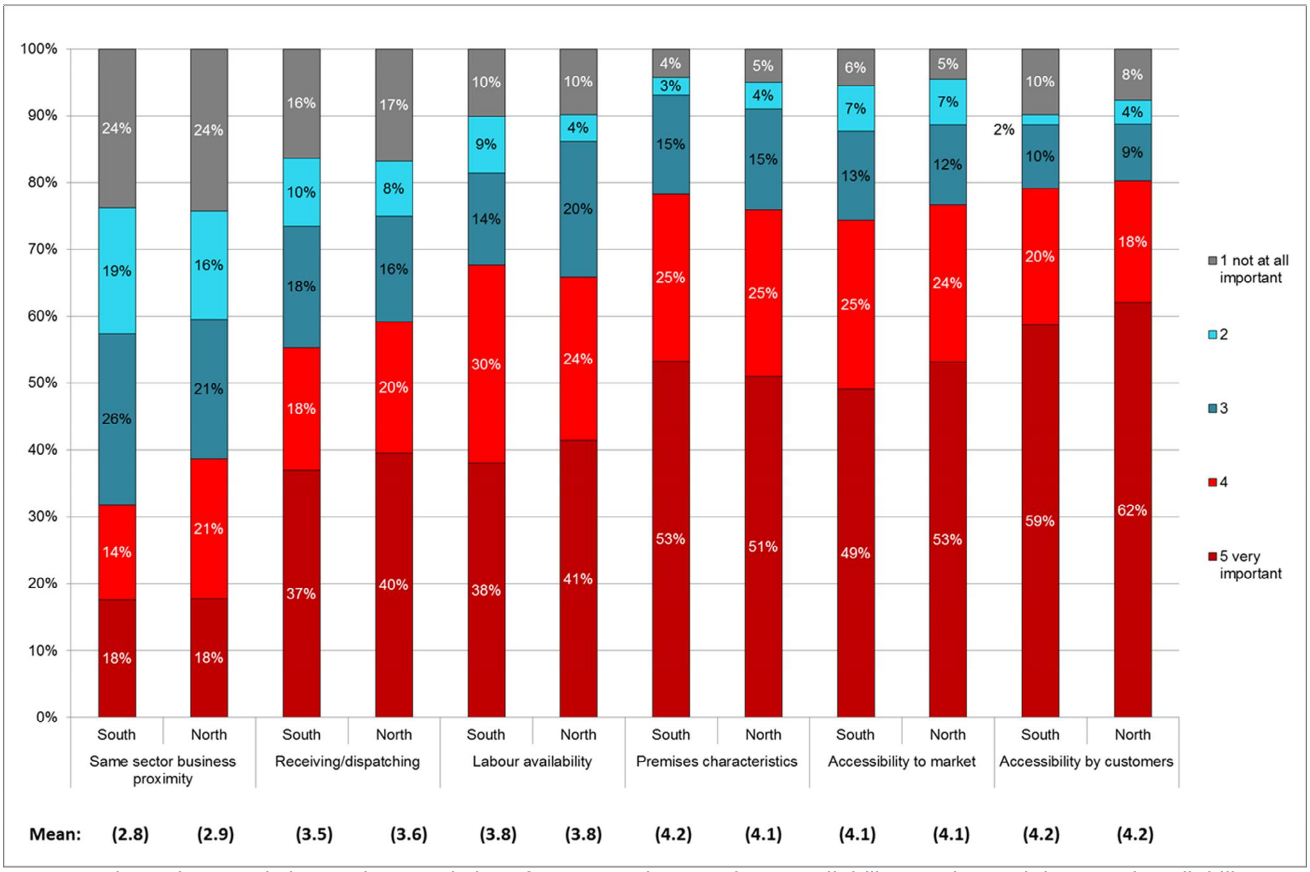
4.3.4 The most frequently cited weaknesses for each borough are more mixed and are as follows:

- Greenwich and Lewisham - local congestion and time wasted in traffic (21% and15% respectively)
- Southwark, Barking & Dagenham and Havering - poor parking facilities (21%, 21%, 19% respectively)
- Bexley - remote from markets (15%)
- Tower Hamlets - affordability of sites /premises (18%)
- Newham - difficulty of access by public transport (16%)

4.4 Areas of importance to businesses

4.4.1 Various aspects of business location were reviewed, as shown in Chart 4.5 (overleaf), 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 4.5 with results categorised on the basis of whether the businesses are north or south of the river.

Chart 4.5: Importance of location issues by geography



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

4.4.2 Accessibility by customers and visitors is the most important consideration, with c.80% rating it important both north and south of the river (mean score 4.2). Accessibility to market is valued almost equally highly, with around three quarters rating this as important both north and south of the river (mean score 4.1).

4.4.3 The other major consideration is the physical characteristics of the premises themselves, with a similar mean score for businesses both south (mean score 4.2) and north (mean score 4.1) of the river.

4.4.4 Labour availability is slightly less important to the majority of firms, with around two thirds feeling that it is of importance to their business (mean score of 3.8 north and south of the river).

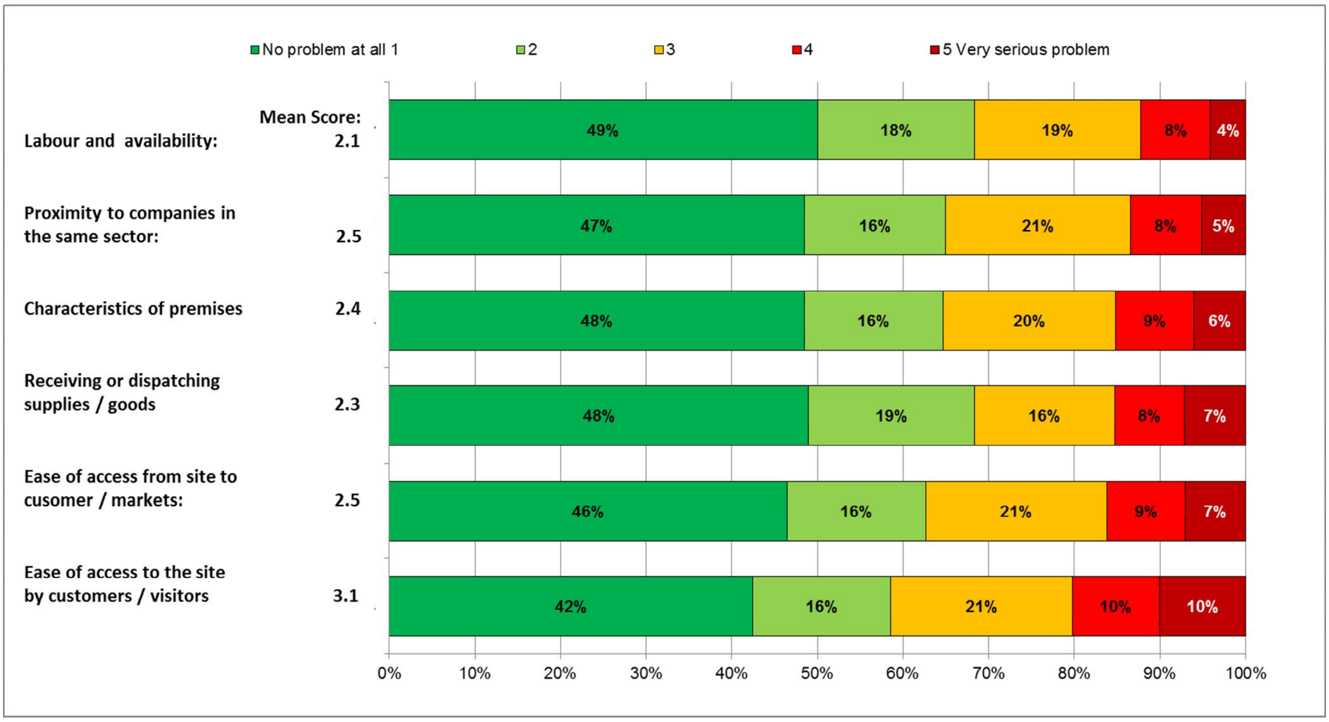
4.4.5 Ease of receiving/dispatching goods and services provided mixed feedback, reflecting both geography and the various levels of dependency that different sectors have on goods transfer. For example, c. 61 -65% firms in Barking and Dagenham, Bexley and Havering rate receiving/dispatching of goods as important to the running of their business, compared to around half of businesses located in the other study boroughs. The majority (79%) working in the transport/distribution/retail sector rate receiving/dispatching of goods as important, followed by 71% primary/manufacturing businesses.

4.4.6 Proximity to other businesses obtained the most variability, with each value between 1 and 5 obtaining roughly equal weight (17% to 23% of firms in each case). Those operating in the transport/distribution/retail and public services sectors are most concerned about being close to similar businesses (43% of each type of business rate this as important), with only 27% of TRAD businesses (and 33% public sector services) perceiving it as unimportant. In contrast, the opposite is true for the manufacturing and private service sector where 47% and 48% felt it was unimportant respectively and where in turn 25% and 28% consider it important.

4.5 Difficulties faced by businesses

4.5.1 Firms were then asked how much each aspect causes a problem to their business in its current location, as shown below in Chart 4.6.

Chart 4.6: Degree of difficulty with location issues



4.5.2 Overall none of the issues posed to businesses were seen as particularly problematic. The greatest issue was access to their business site by customers and visitors, notified as a problem by 20% of firms, with this differing by location. Almost a third of businesses in Newham (and over a fifth of businesses in Barking and Dagenham, Lewisham, Havering and Bexley) noted that ease of access to the site by customers or staff is an issue. In Newham, Bexley, Havering and Lewisham, the parallel issue of difficulty reaching clients, customers and markets from the site is also noted (c. 15 - 20% businesses). This corresponds with the earlier high ranking within Bexley of being remote from markets as an issue. Businesses in Greenwich also note difficulty of reaching clients, customers and markets as causing some problems (17%).

4.5.3 Characteristics of premises are reported to be an issue in Newham (24%), Havering (21%), Southwark and Barking & Dagenham (15% in each). Proximity to companies in the same sector is seen as a problem to 17% in Barking and Dagenham, 15% in Havering and to 14% in each of Newham and Tower Hamlets.

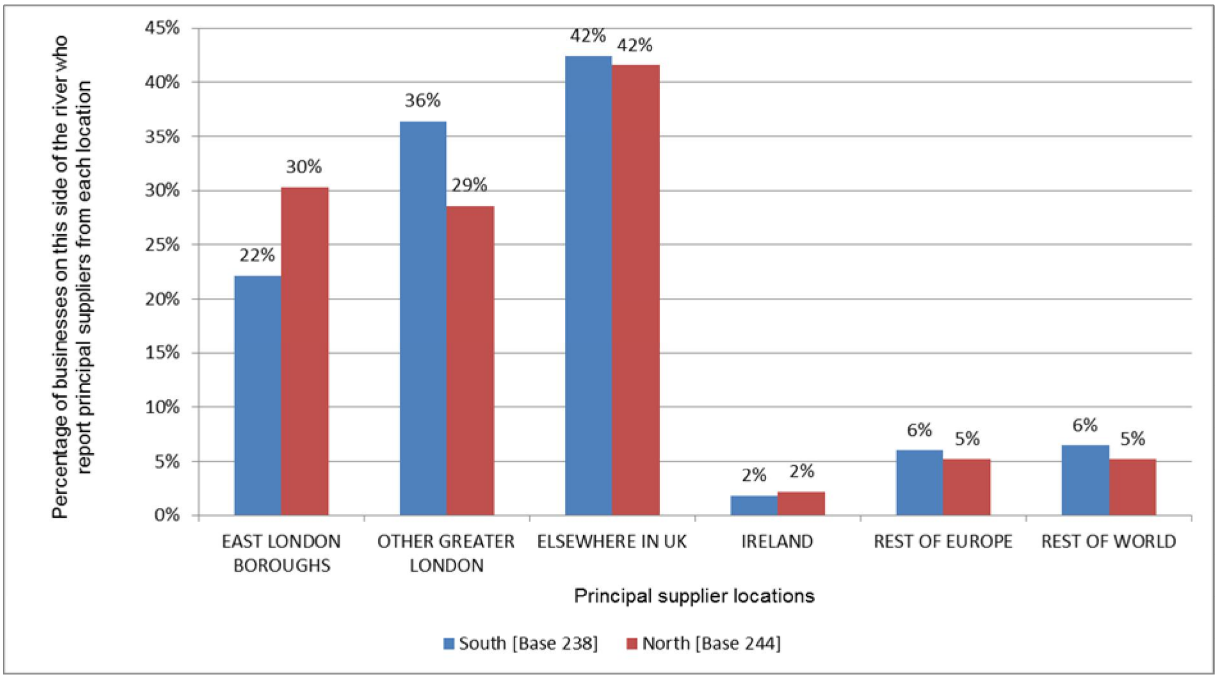
4.5.4 Businesses in Tower Hamlets have a slightly greater issue with receiving and dispatching goods (19% and 15% respectively), which corresponds to businesses in the borough giving a high ranking of congestion as a weakness of current business location. Labour availability is not rated a significant 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.

4.6 Transporting goods

4.6.1 The relative importance of moving goods and services to businesses was explored through a number of questions. Businesses were asked about their usage and spending on haulage, with detailed information available for further data interrogation by TfL as required.

4.6.2 Chart 4.7 presents the data on the reported location of principal suppliers, shown separately for businesses north and south of the river.

Chart 4.7: Location of businesses' principal suppliers (by location of business north or south of river)



Base: All who say receiving / dispatching supplies is important (482 un-weighted, 448 weighted)

Note: Businesses could select as many locations as apply to them

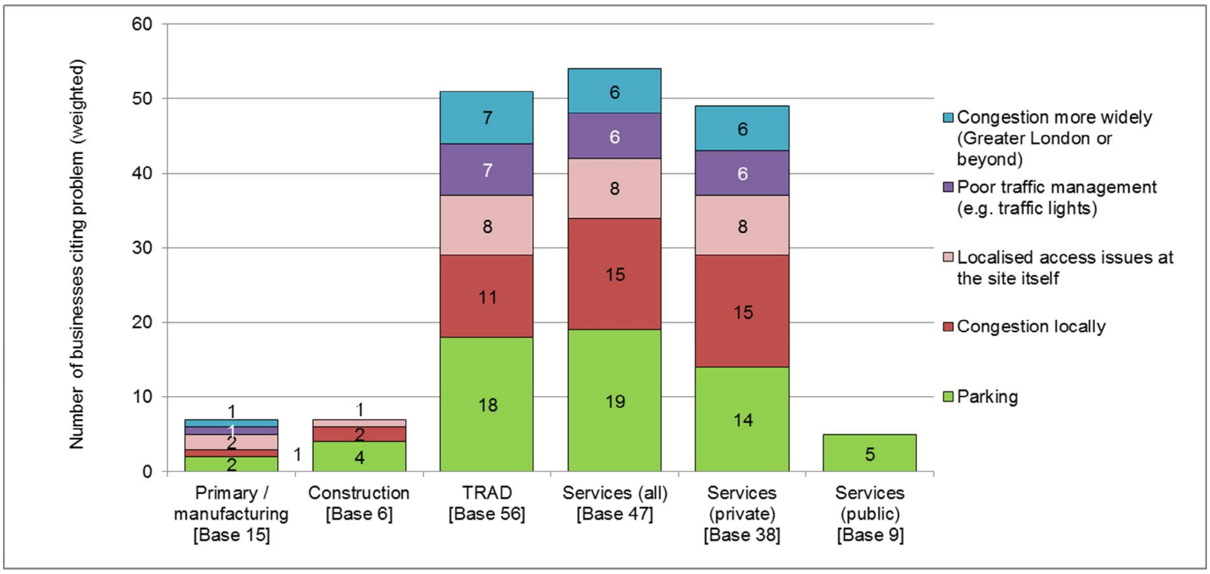
4.6.3 Overall the location profile of key suppliers is similar both sides of the river, although businesses north of the river are slightly more likely to report principal suppliers based in the eight study boroughs (30% of businesses north of the river have principal suppliers in East London) than those south of the Thames (22% of businesses). Conversely, the proportion of businesses south of the river who have principal suppliers elsewhere in Greater London is higher (at 36%) than for businesses to the north of the river (29%). The proportion of businesses with suppliers from other locations is generally similar.

4.6.4 Construction businesses are more likely to have local main suppliers in East London (37%), with the transport, distribution and retail sectors having the highest level of suppliers from mainland Europe (11%, compared to 6% or less for all other sectors).

4.6.5 Over half of businesses (56%) consider that receiving or dispatching supplies or goods is important to the successful operation of their business (rating this at an importance of 5 or 4, where 5 is very important and 1 is not at all important). Currently 15% of companies have problems with deliveries/dispatches, with this rising to 24% amongst the transport, distribution and retail sectors. Considerable detail is available within the dataset on dispatch and delivery movements by sector, borough and other business characteristics.

4.6.6 All businesses who reported problems with receiving or dispatching supplies from their site (119 businesses (15%), with similar proportions north and south of the river) were asked why this was so. The nature of problems reported are summarised in Chart 4.8 below. Overall businesses listed 22 different types of problem. The frequency that each of the top five problems (overall amongst all 800 businesses) was mentioned by businesses is shown in Chart 4.8 by sector. Parking is most commonly reported issue by businesses in every sector, followed closely by local congestion.

Chart 4.8: Delivery problems identified by sector (n) (top five problems shown only)



Base: All who say receiving / dispatching supplies are a problem (124 un-weighted, 119 weighted)

4.7 Labour and recruitment

4.7.1 Of those currently recruiting staff (413); sixteen per cent (67 businesses) have experienced difficulty in recruitment, primarily as a result of current macroeconomic circumstances. Half of those who gave a reason why they experience difficulties said that it is due to poor quality of applicants (by far the most commonly stated reason). Fourteen businesses stated (unprompted) that one of the causes of these problems is poor transport links, noted by an equal number of businesses both north and south of the river.

4.7.2 Regarding distance from the existing crossings, a significantly higher number of businesses with difficulties recruiting due to poor transport links are within six km of the Gallions Reach ferry (nine out of fourteen). Conversely, eight businesses experiencing transport difficulties in recruitment are over 6km from both the Woolwich Ferry and the potential Silvertown Tunnel.

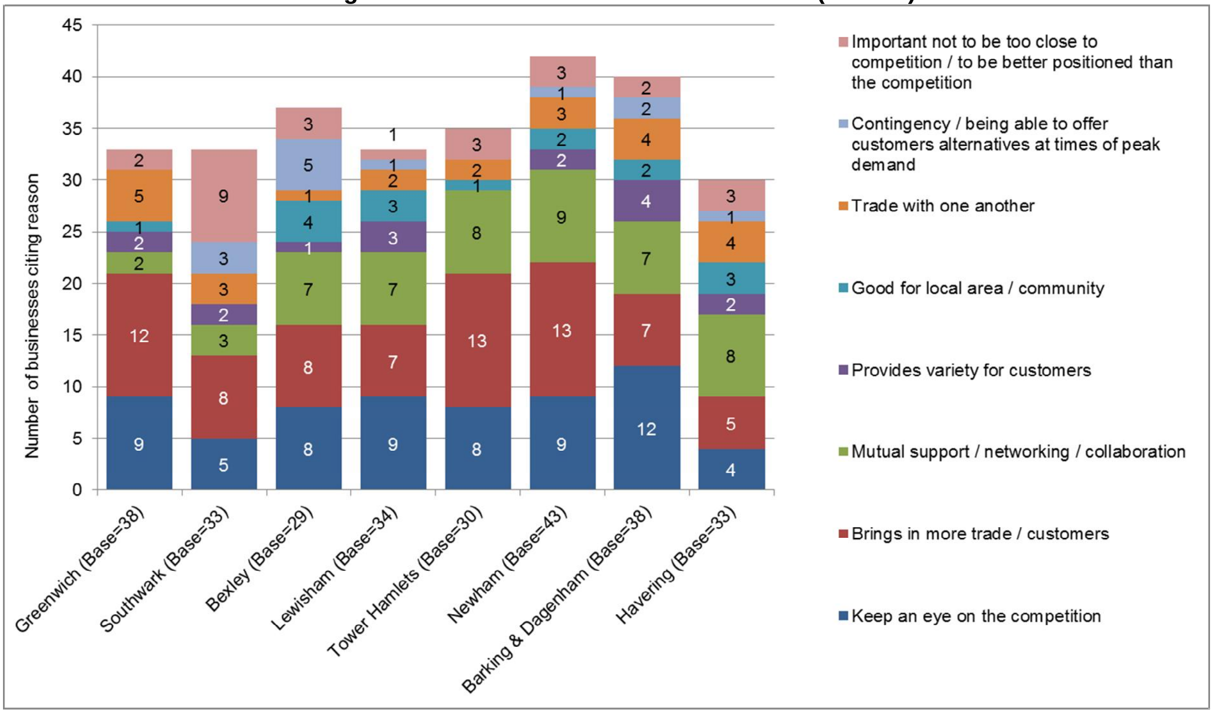
4.7.3 Nearly all businesses experiencing difficulties (thirteen out of fourteen) are more than 6km from the Belvedere-Rainham Crossing, although this partly reflects the location of the Belvedere-Rainham crossing to the eastern boundary of the study area. Twelve of these fourteen businesses believe that river crossings are important to successful operation of their business in this location and ten of them commented that they feel the river is a barrier to the growth of their business.

4.8 Agglomeration

4.8.1 The third of businesses (272) stating that proximity to other firms was important to them (see section 5.4) were asked to explain why this is the case, with their reasons presented in Chart 4.9.

4.8.2 The most frequently given explanation for proximity to other businesses in the same sector being important is because it brings in more trade / customers. These agglomeration benefits are particularly noted in Tower Hamlets, Newham and Greenwich; where one in three businesses want to locate close to other businesses in the same sector in order to support one another or to attract more trade to the cluster of activity. Keeping an eye on the competition is more of a driver in Barking & Dagenham.

Chart 4.9: Reasons for locating close to businesses in the same sector (n=272?)



4.8.3 Preventing a loss of trade by avoiding being close to competitors is more important to businesses in Southwark than in other boroughs (%s or numbers?). An example of avoiding being located too close to competitors is a convenience retailer (i.e. 'local' format store run by a supermarket chain), where customers typically visit their very closest store. Therefore, whilst paying attention to proximity to other businesses is important to these firms, proximity to competitors is actually a dis-benefit. Conversely, a similar number of firms in Southwark also believe that co-location brings in more trade / customers.

4.9 Business case studies

4.9.1 To provide context in understanding business' perspectives more deeply, five depth interviews were undertaken amongst a range of businesses interviewed in the main survey covering a number of sectors, business sizes and locations. These pen portraits are illustrated on the following pages.

AOP Art of Presentation (2 staff)

AOP is a specialist design and reprographic facility which produces 2D and 3D product packaging. The firm is based in Rolt Street, Deptford Park around 4 miles south west of the Blackwall Tunnel and 3 miles south east of Tower Bridge. The Company is a dynamic small business, currently employing just two members of staff but with plans to expand. Because of the 3D and visual nature of its product, they cannot send product designs electronically: clients want to be able to physically approve draft designs. They therefore use couriers for anything from an A4 envelope to 5 -10 boxes of products

Deliveries to clients are very time-sensitive. Most couriers use Tower Bridge or the Blackwall Tunnel, and problems can lead to key deadlines being missed. In particular, designs are often booked via DHL and City Airport to worldwide destinations such as Geneva or Hong Kong. On occasions, closure of Blackwall has led to flight slots being missed with significant cost and reputational consequences. AOP would be very supportive of an additional river crossing and would not see a toll as a significant issue: “you have to pay for everything these days”.

Barnvale Engineering (14 staff)

Barnvale Engineering is a manufacturing and distribution facility for a wide range of products to support the petro-chemical and construction industries. It produces specialist fire-resistant materials and pipe supports, fixings etc. Barnvale is based on River Road, Barking, south of the A13 and just east of the river Roding which delimits Barking from Beckton. This is in the LB of Barking & Dagenham.

The company employs 14 staff on–site, of which 10 are in manufacturing and 3 in distribution, with the other employee managing the business. Staff travel in by bicycle or car (50/50) as the shift starts at 06:30. Staff turnover is low and recruitment tends to be via the local Jobcentre Plus. Most staff live north of the river; although they have had staff from south London they tend to have difficulty getting in for the early start.

Barnvale has two of its own delivery vehicles (vans) for London customers and uses an overnight courier service for UK-wide distribution of their products. They have suppliers deliver to their site on a daily basis.

Barnvale vans use the Dartford crossing, the Rotherhithe and Blackwall tunnels and Tower Bridge on a regular basis depending on customer location. They will also use the Woolwich Ferry on occasion. If a crossing is shut or heavily congested then this can lead to late working for staff, with efficiency and cost implications. It can also mean that deliveries are held over until the following day, which puts customer satisfaction at risk. If there is a problem with one crossing then this can have knock-on effects for congestion at the other crossings as traffic diverts. This also affects the A13 which is adjacent to Barnvale's premises and means that it is not just cross-river movements that are affected.

Barnvale would welcome an additional crossing and would be very comfortable with paying tolls at a similar level to Dartford if it meant an improvement in reliability and reduced congestion. Their preference would be for an additional tunnelled crossing as a bridge would be more likely to be shut in bad weather.

Bryen & Langley Ltd (120 staff)

Bryen & Langley is an established construction company based in Eltham in the LB of Greenwich. It employs 120 staff as well as a network of specialist contractors, and undertakes major building projects across London and the South East. It has a specialist tool and plant hire company, Andara, which employs 11 staff. The majority of hired equipment is delivered all over the South East using its own fleet and drivers. Deliveries are time-critical as any delays have consequential time and productivity costs. Crossing the river is deemed to be essential to the successful operation of the business.

For jobs in East London, the firm is reliant on the Blackwall Tunnel and Woolwich Ferry. Major incidents and / or closures necessitate lengthy diversion and delays. Weight limits on Tower Bridge prevent many vehicles using this alternative route. At times, the firm delivers specialist gas equipment which cannot travel through tunnels, so relies on bridge and ferry routes to cross the Thames.

Management time is spent monitoring traffic conditions and disseminating this to vehicles affected. The uncertainty in crossing the river means that delivery times to East London cannot be guaranteed and this affects repeat business from customers. Furthermore, if vehicles are delayed north of the river this leads to late finishes, overtime costs and late closing for the hire depot.

Staff for Andara are recruited locally by word of mouth or through the local Jobcentre Plus, although the quality of applicants has not been good recently via the latter. They will not consider recruiting from north of the river because of the risks to staff getting in on time, especially in bad weather.

Additional costs noted by the company include:

- Management time monitoring cross-river traffic conditions,
- Overtime payments,
- Fuel and mileage costs from diversions,
- Loss of business due to variability in cross-river journey times.

C&D Ltd (100 staff)

C&D Limited is a manufacturing and distribution company for sanitary and hygiene products based in Belvedere in the LB of Bexley. The company site is north of the A2016 and close to the River Thames. There is a manufacturing plant on site and a distribution depot with 16 vehicles ranging from articulated lorries to vans. They have permanent staff that live across the river, including Directors who commute in from Essex. However, they only use agency staff from the Belvedere/Dartford area south of the Thames.

The distribution fleet covers the whole of Kent, London and around the M25, as far as Reading. Customers further afield are serviced by contract distribution which might pick up 80 pallets a day from the site. In-house vehicles use the Dartford Crossing and the Blackwall Tunnel on a regular basis. Reliability issues are a major concern and it is often difficult to predict delivery times to customers.

If major incidents affect one river crossing, this often has knock-on implications for congestion at the other crossing as traffic is forced to divert. On occasion, vehicles are forced to use the Woolwich Ferry, although this leads to delays in the delivery schedule. This can lead to a backlog of deliveries across the week, which has efficiency and cost implications.

The company stated clearly that congestion issues were limiting the growth potential of the business, and had a wider implication for quality of life in the area. C&D Ltd would be very supportive of an additional East London crossing. If it led to better reliability, the efficiency gain would make worthwhile paying a toll commensurate with that at Dartford

Quirk E-Marketing Ltd (19 staff)

Quirk is a South African owned Marketing Agency that has its London office in Great Guilford Street in the LB of Southwark, just south of Southwark Street and close to Southwark Bridge. This is their only office outside of Africa.

The Company employs 19 staff on site. Staff travel in from all over London and beyond by public transport or bicycle. In terms of recruitment this tends to be done via their website or through word of mouth, with South African staff often working in London on secondment.

It offers a full range of marketing services, much of which is dealt with online. Nevertheless, staff travel regularly to meetings locally in London on both sides of the river, and clients visit on a similar basis. Quirk use couriers for key deliveries and pick-ups, and have supply deliveries of marketing materials for physical campaigns. They also distribute learning text books worldwide. Access issues tend to be localised due to the following difficulties:

- Local way-finding due to confusing numbering along streets,
- Local parking for trade and business visitors.

Congestion is occasionally cited as a reason for delayed deliveries, but is not a major issue: “this is London”. Quirk has relationships with clients and sub-consultants within walking distance, south of the river. Equally, however, key business relationships are maintained with firms north of the river that are just a short taxi ride away or walkable on a fine day. For Quirk, located in this part of London where service sector growth has been strong in recent years, the river is not perceived as a barrier to business-to-business communication nor to staff recruitment or retention. Quirk are therefore not concerned about a new crossing

5 Key findings – Business performance and outlook

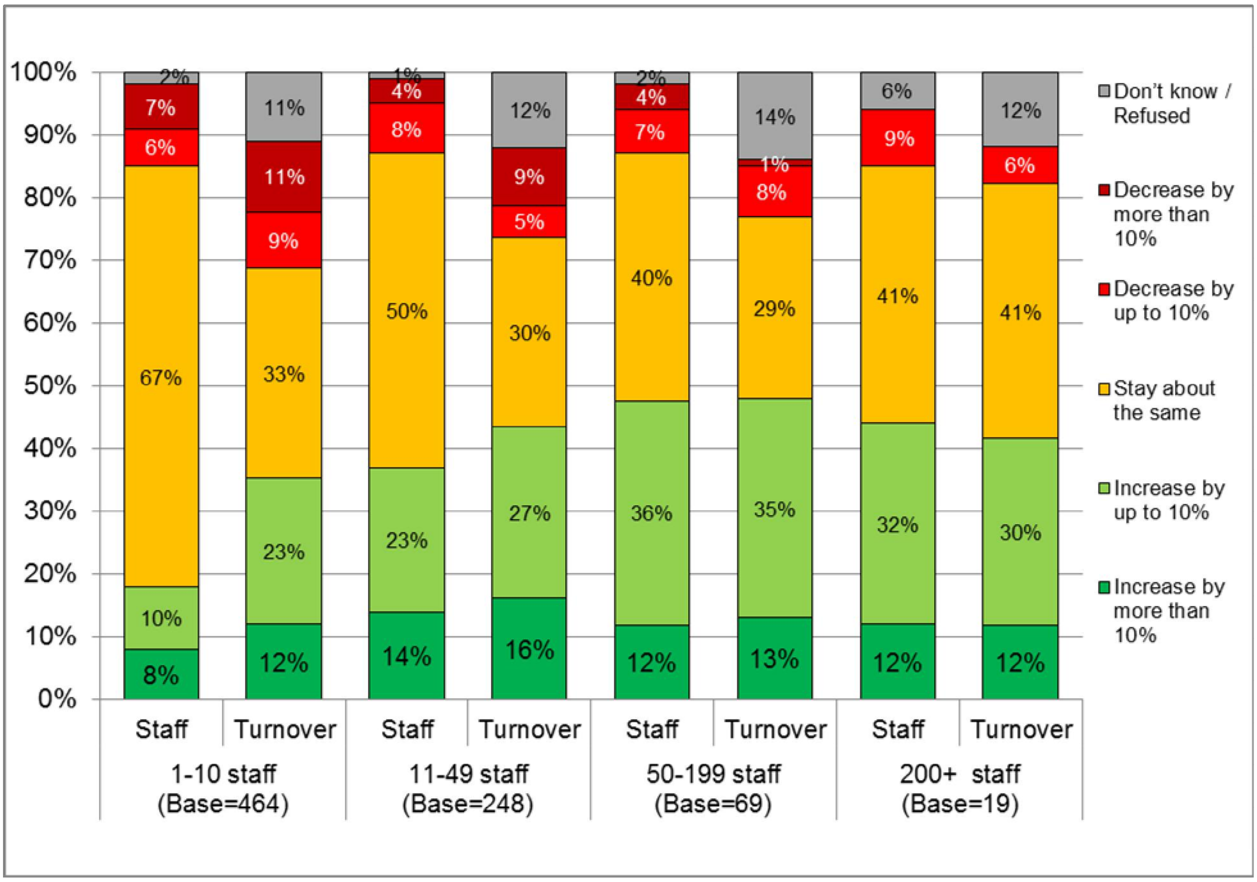
There is spare capacity in the local economy (October 2013 / March 2014), given that 61% of businesses expect their turnover to grow over the next 12 months, yet only 29% are considering an increase in staffing levels. For those that do recruit, the vast majority (83%) do not have difficulties. This reflects the current state of the post-recession labour market.

5.1 Recent business performance (last 12 months)

5.1.1 Overall just under a quarter of businesses surveyed had increased their staff numbers in the past year. However, larger firms were far more likely to have taken on new staff (48% of those employing 50-199 staff and 44% of those with 200+ employees compared to 18% of firms with less than 50 employees, as shown in Chart 5.1.

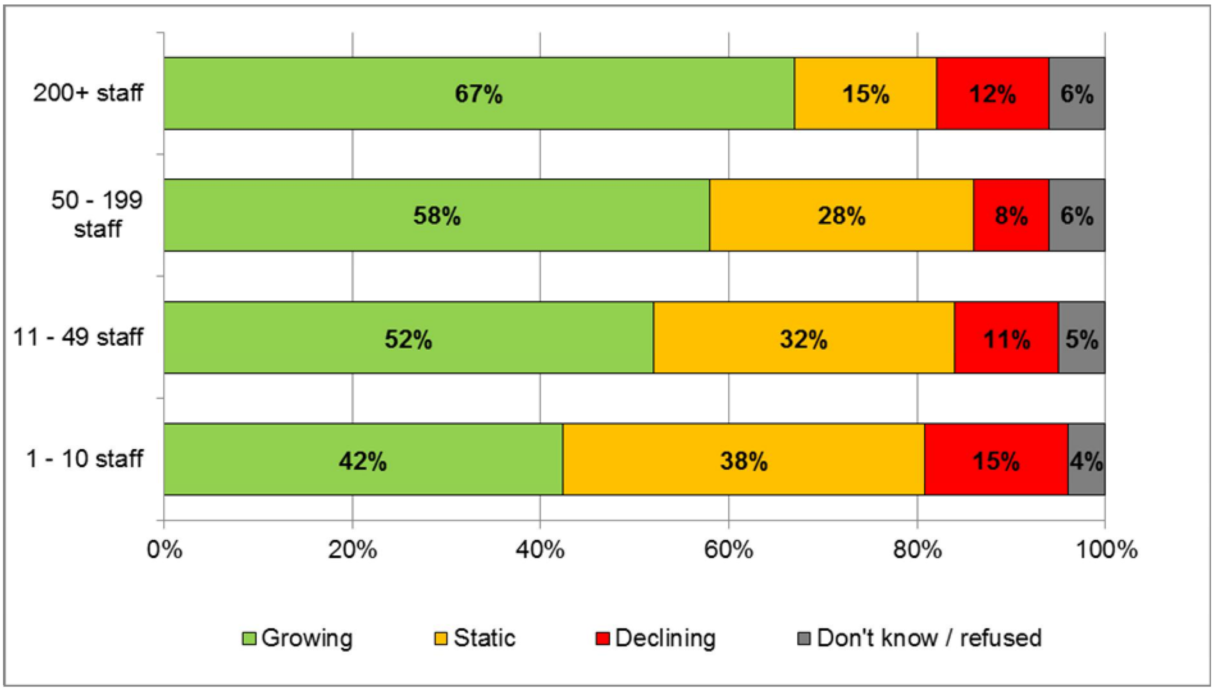
5.1.2 Nearly half of medium sized businesses reported growth in turnover (48%). Turnover grew more than staffing levels amongst small businesses (35% turnover growth v 19% staff increase), with medium sized and larger firms having greater parity between the two (48% growth both in turnover and staff for businesses with 50-199 employees, and 42% turnover growth v 44% staff increase for large firms)..

Chart 5.1: Comparison of staffing and turnover changes in past 12 months by business size



5.1.3 Echoing increased business optimism, more businesses feel they are now growing than in decline. This is most marked for larger employers (200+), where 67% state they are growing compared to 42% of businesses with ten or fewer staff.

Chart 5.2: Current business status by employee size



5.2 General business outlook

5.2.1 Businesses within the area are generally positive about their future growth, with 61% expecting growth in turnover over the next 12 months, and 29% expecting it to remain static (just 6% in decline).

5.2.2 There is little variation in perceived likelihood of turnover growth between sectors, with the proportion of businesses expecting growth ranging from 46% (Public Services) to 58% (Private Services). There is more variation between boroughs, with between 48% (Lewisham) and 65% (Southwark) expecting growth in turnover over the next 12 months.

5.2.3 Businesses' responses suggest that there is spare capacity in the local economy at present, given that 61% expect their turnover to grow over the next 12 months, yet only 29% of businesses consider the number of staff that they employ is likely to increase (Chart 5.3). It appears that around a quarter of businesses expect to grow without employing additional staff to help achieve this. This is common across all sectors.

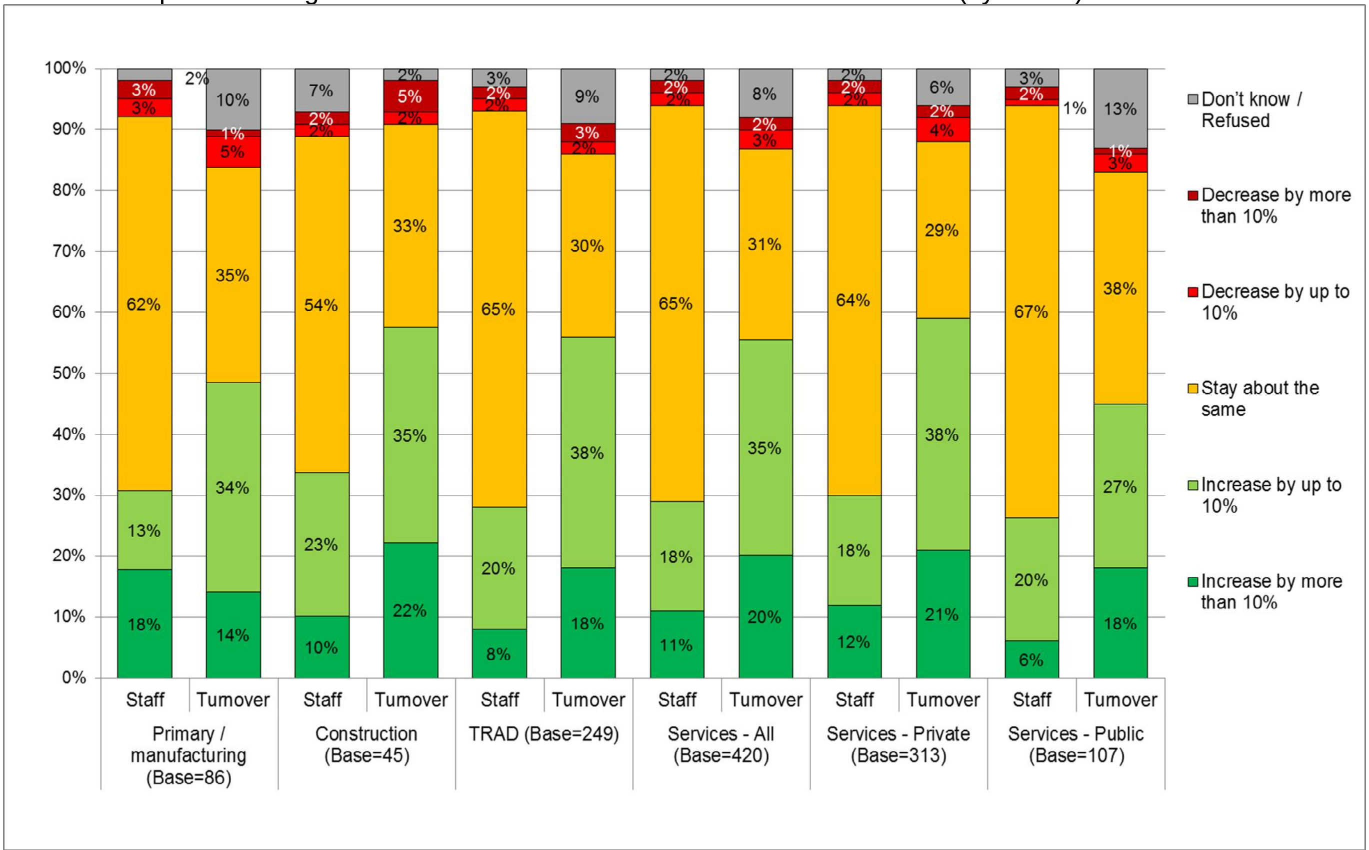
5.2.4 The majority of businesses (64%) expect staff numbers to stay about the same, while c. 26% - 33% of businesses (depending on sector) expect staff numbers to grow. Southwark businesses in particular expect significant staffing increases, with 40% of businesses forecasting growth in staffing levels. Indeed, nearly a quarter of Southwark businesses expect growth beyond 10% of their current staff size. This is followed by 38% of businesses in Newham anticipating increasing staff and a third in Bexley. Around a quarter of firms in the remaining boroughs expect to recruit new staff in the coming year.

5.2.5 Primary / manufacturing and construction sector businesses are more likely to expect staff numbers to grow (31% and 33% respectively) and to expect numbers to grow strongly (18% and 10% respectively). Public sector services are slightly less likely to expect staff numbers to grow over the next 12 months (26%); than private sector services (30%).

5.2.6 Businesses that opened before1990 are less likely to expect future staff increases (18% v 29% overall). The degree of uncertainty seems greatest amongst the construction sector, with 7% unable to predict staffing levels next year compared to just 2-3% of businesses in each of the other sectors.

5.2.7 In contrast, significantly greater change is anticipated by businesses in turnover. Over half of businesses (55%) expect their turnover to grow over the next 12 months, ranging from c.45% in public sector services to 59% amongst private sector service organisations, as can be seen in Chart 5.3 below.

Chart 5.3: Expected change in staff numbers and turnover in the next 12 months (by sector)



5.2.8 Businesses operating in Southwark are most confident about the next 12 months (65% expect turnover increase), while neighbouring Lewisham are least (47%). Businesses operating pre-1990 are also less likely to anticipate turnover growth (47%).

5.2.9 There is a direct correlation between turnover volume and expected growth, with the largest companies having the most positive outlook: 71% of those with turnover greater than £500k expect growth compared with 47% of businesses with turnover below £50k.

5.2.10 Amongst those six km or less from Gallions Reach, 48% expect growth in turnover compared with 55% overall. There is some difference in the composition of business sector of companies within different distances of Gallions Reach (with 11% - 20% of businesses in each sector located within 6km of Gallions Reach), but this is not found to be statistically significant. Public sector service businesses are least likely to fall within 6km of Gallions Reach (11%) and construction businesses most likely (20%). As a result, the relationship between turnover and distance may be influenced by these differences.

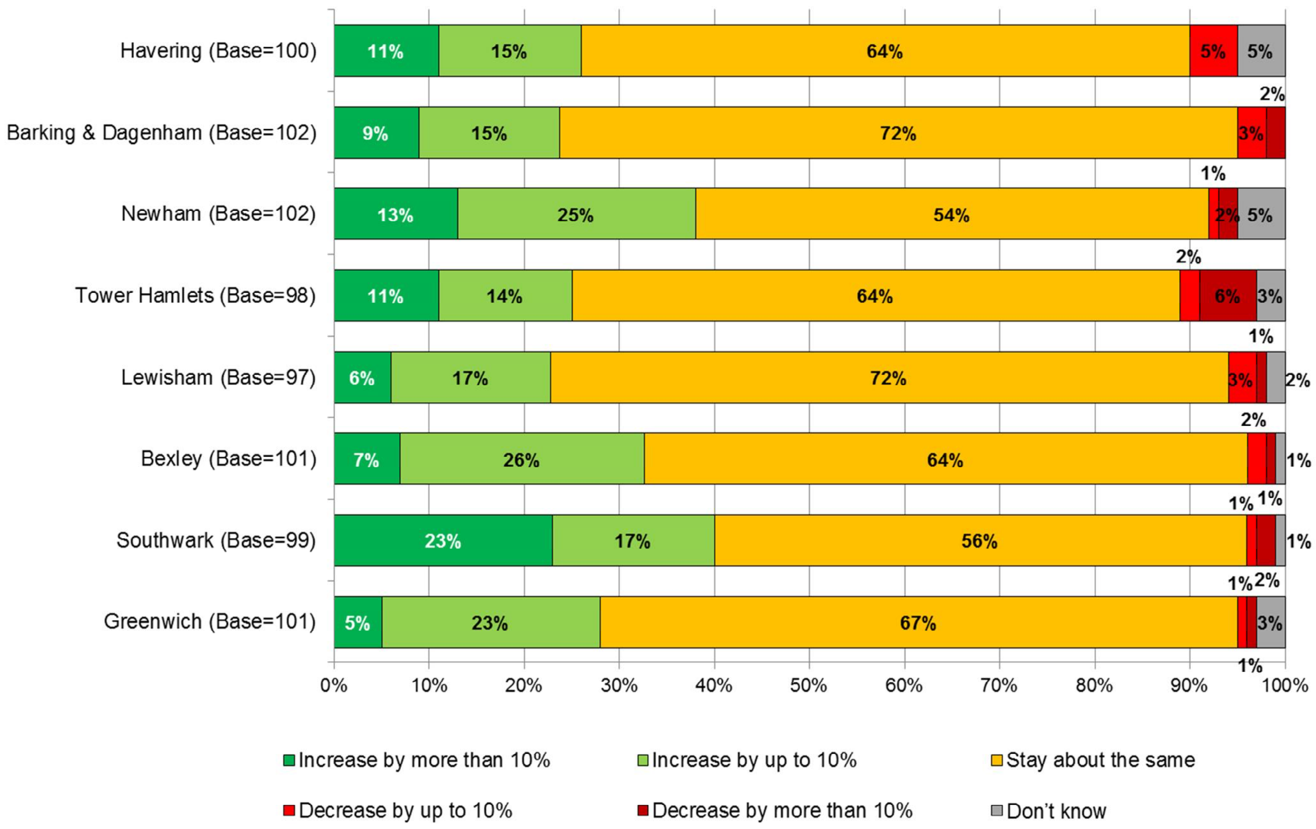
5.2.11 While reduction in turnover is only anticipated by a small minority (5%), this rises to ten per cent in Tower Hamlets and Havering. Construction businesses are slightly more likely to expect a decrease in turnover (as for staff numbers), with seven per cent of businesses in this sector saying this.

5.2.12 Below is an illustration of a typical growing business in East London:

Growing business profile

- Retail business located in Southwark
- Employs over 80 staff, with some seasonal increase to c.100.
- Started trading in 2003, with current turnover over £500k
- Anticipating turnover growth over 10% in 2014

Chart 5.4: Expected change in staff numbers over the next 12 months (by borough)



6 Importance of cross-river movements

Improvements to cross-river journeys are important to businesses
Nearly two thirds of firms (64%) regard the ability to cross the Thames as important to the successful operation of their business. Only 18% of businesses feel that current crossing options are adequate.

The Construction sector is most concerned about problems crossing the river
Three quarters (77%) of all construction businesses regard crossing the river as important to their success, followed by 59% in primary/manufacturing, 56% in TRAD businesses and 46% in the service sector. The main benefit of a new river crossing anticipated by construction firms is more predictable journey times (86% expect this to result from the investment package).

Respondents see the river as a barrier to the development of their business on the other side
Overall around a third of all businesses (32%) agreed with this statement, although this is higher in Greenwich (49%), Newham (47%) and Bexley (40%). Should the investment package be implemented, 65% of firms anticipate more business coming from the other side of the river (82% for Newham).

Poor predictability of cross-river journey times is a particular issue to businesses
Two thirds of firms (65%) consider that poor reliability of cross-river travel acts as a constraint on (or disruption to) their business. Forty four per cent of firms think predictability of journey times are poor or very poor, against 12% who regard them as good or very good. This is of most concern to firms in Greenwich and Bexley. Overall, 78% of firms anticipate more predictable journey times as a result of the investment package.

6.1 Importance of crossing the river in East London

6.1.1 Overall two thirds of businesses report that the ability to cross the river in East London is important to their business (64%), with a third rating it as very important or essential. Only 18% feel current crossings are adequate.

6.1.2 Chart 6.1 presents findings by borough, with Newham firms most affected by East London river crossings (47% saying crossing is very important/essential), closely followed by Greenwich (45%) and Bexley (40%). (NB: the 47% businesses in Newham does not match the sum of the very important category with the essential category, due to rounding of percentages.

6.1.3 Levels of importance are similar across all sizes of business. Not surprisingly, the construction sector is most dependent on crossing the river (50% say this is very important/essential) followed by the primary / manufacturing sector (40%), as shown in Chart 6.2.

Chart 6.1: Importance of East London river crossings to successful business operation (by borough)

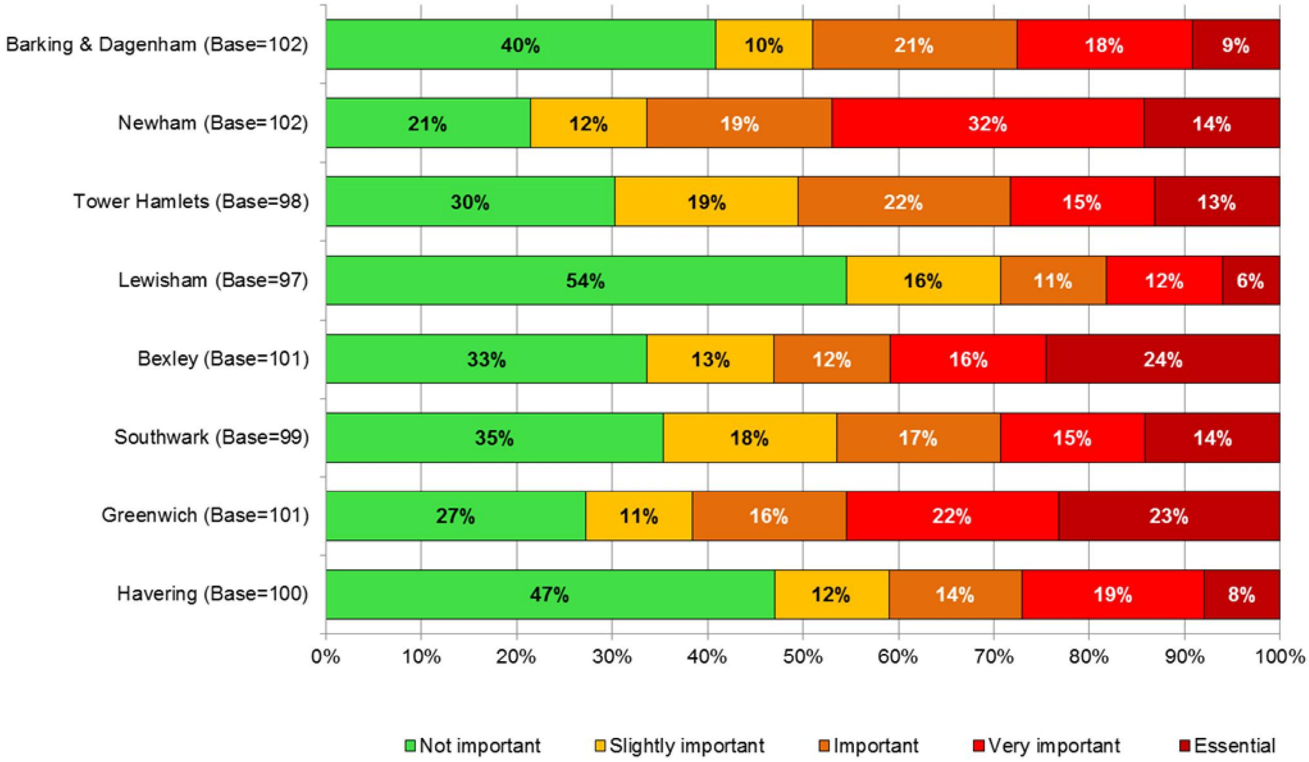
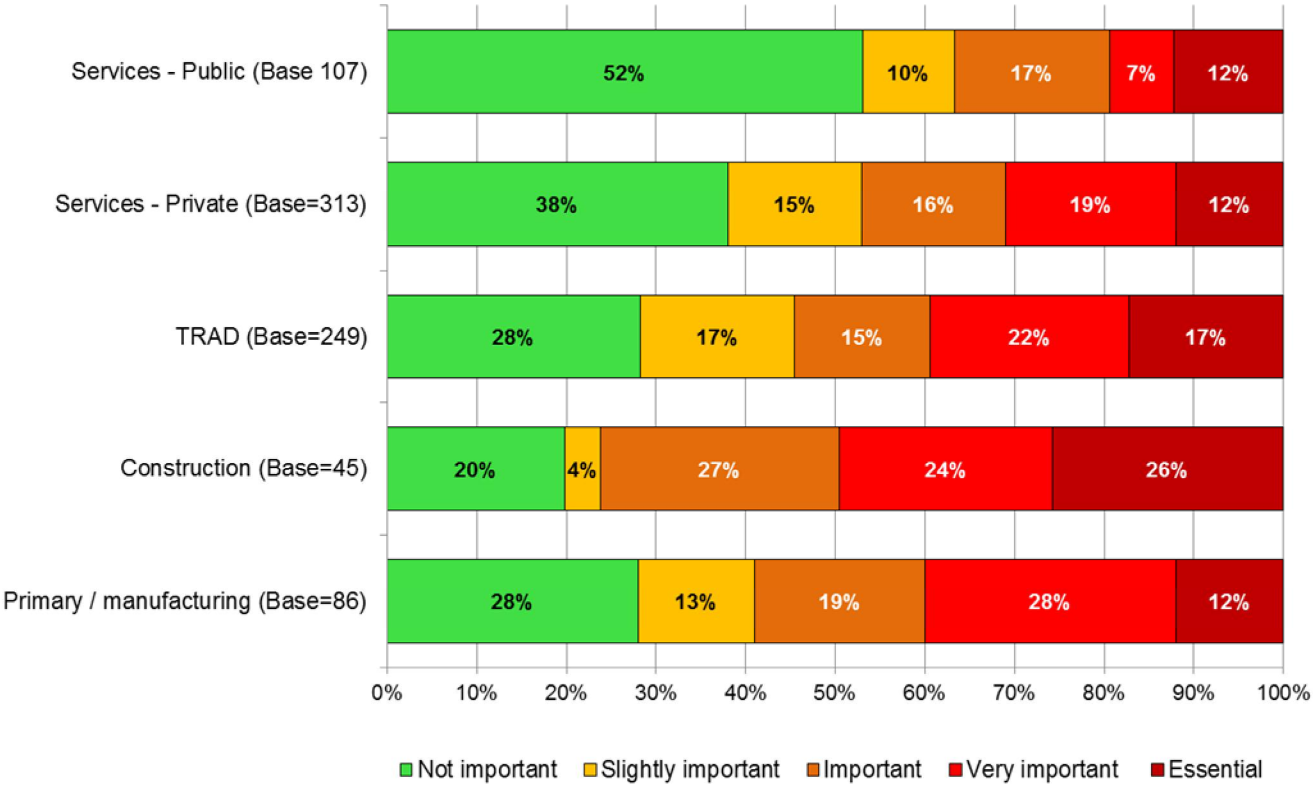
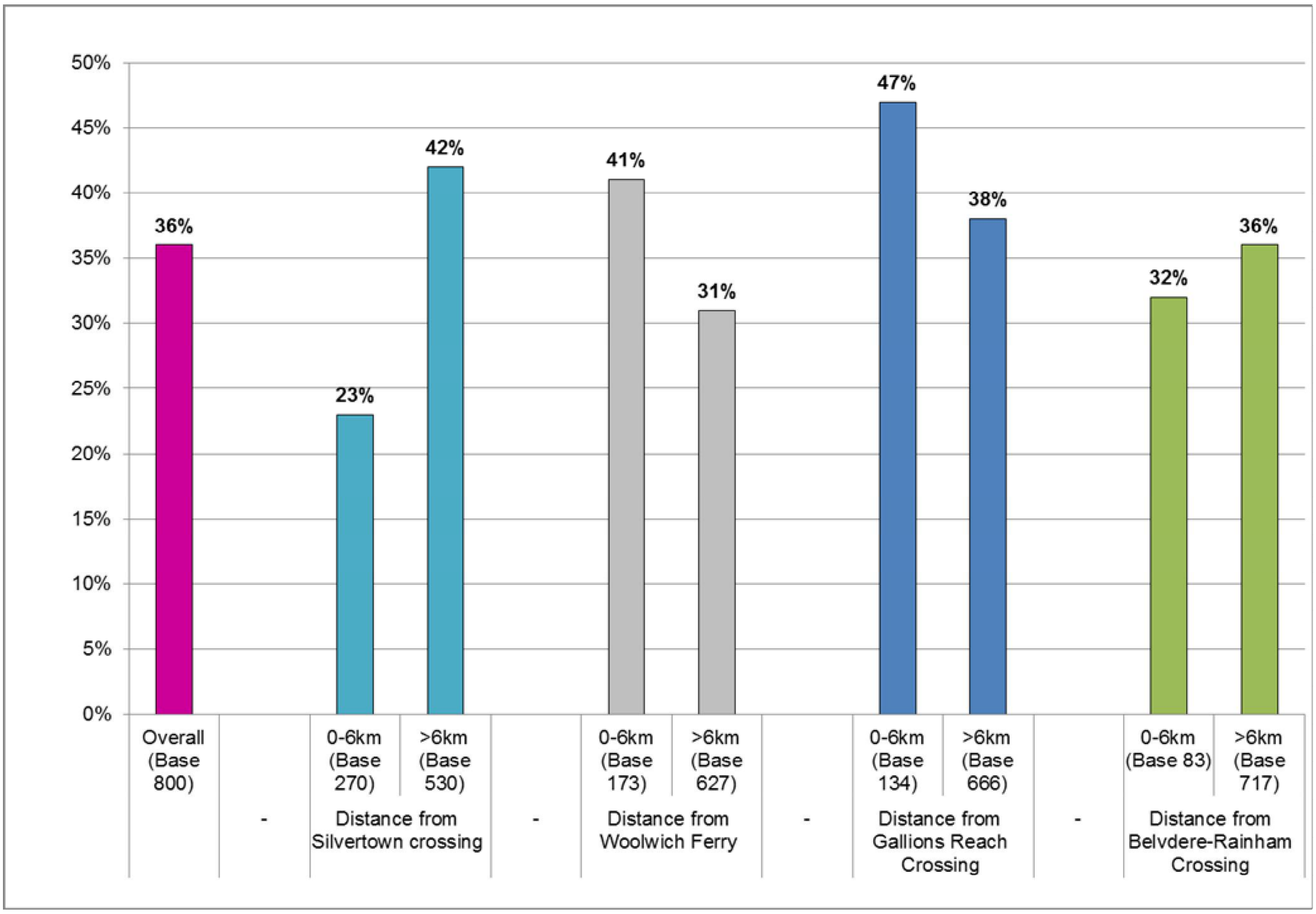


Chart 6.2: Importance of East London river crossings to successful business operations (by sector)



6.1.4 Chart 6.3 presents the importance of river crossings to businesses by distance from the four crossing options under review (amongst all 800 businesses interviewed), highlighting those businesses for whom crossing the river in East London is essential or very important. Just under a quarter of businesses located up to 6km from Silvertown find the ability to cross the river as very important/essential (23%), while nearly half of firms located within 6km of Gallions Reach (47%) claim that river crossings are essential or very important to them.

Chart 6.3: Businesses rating ability to cross the river in east London as 'essential' or 'very important'

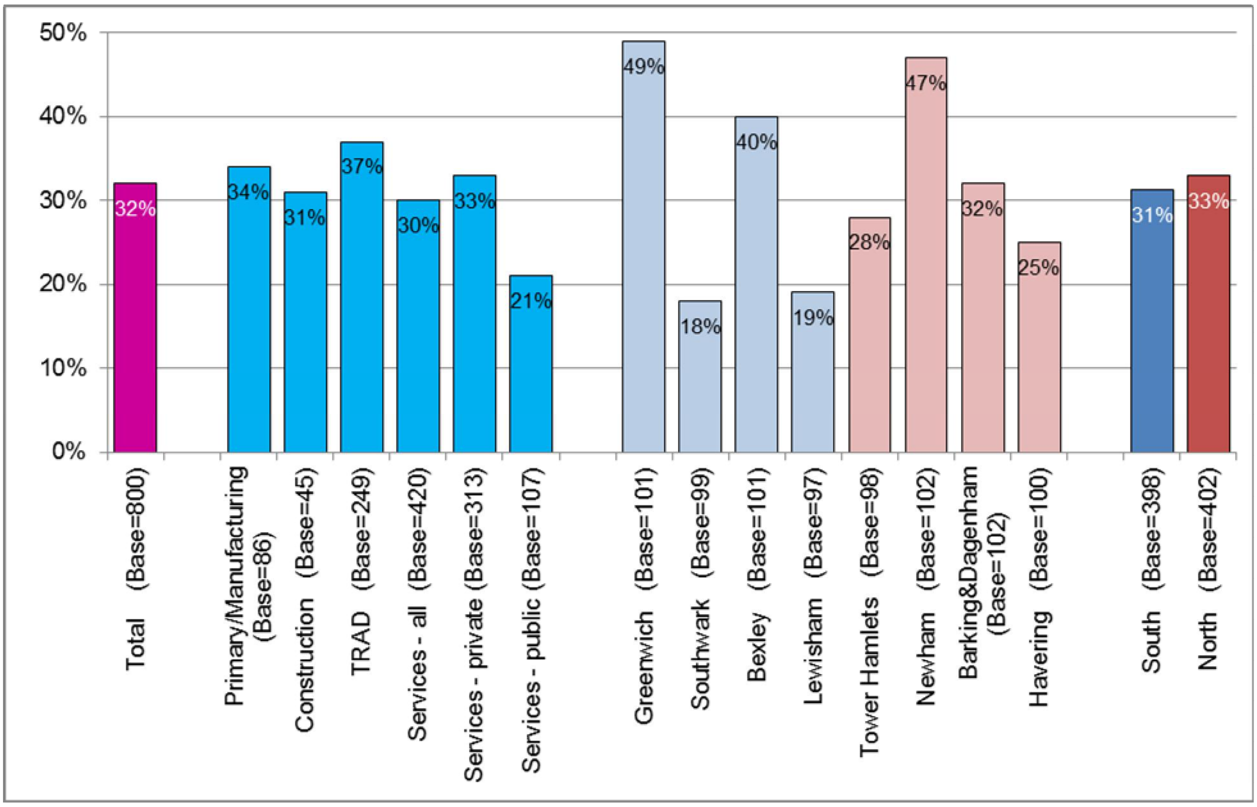


6.2 The river as a barrier to development of business on the other side

6.2.1 Overall around a third of businesses (32%) report the river to be barrier to their development across the other side. This is particularly pronounced for businesses in Greenwich (49%) and Newham (47%), close to the existing Blackwall Tunnel. In contrast, the barrier effect is reported by a significantly lower proportion of businesses in Lewisham (19%) and Southwark (18%), boroughs closest to the many other crossings in Central London.

6.2.2 The proportion of businesses reporting that the river is a barrier to business on the other side is greater amongst the more transport-dependent sectors of Primary / Manufacturing (34%), Construction (31%) and TRAD (37%) and lowest for those in public services sector (21%).

Chart 6.4: Proportion citing river as a barrier to business development on the other side



6.3 Cross-river journey times

6.3.1 Businesses were asked how predictable journey times currently are for road traffic crossing the River Thames in East London. The results are presented by borough in Chart 6.5 and by sector in Chart 6.6.

6.3.2 Overall, 44% of businesses rate journey time reliability as poor or very poor, with just 12% rating it as good or very good. The construction sector rates reliability most poorly (54% poor/very poor and 7% good/very good).

6.3.3 Public sector service businesses are least concerned about journey times crossing the river in East London, with 20% having no opinion over predictability, compared with 14% overall. Those companies anticipating a decline in turnover are also less aware of cross-river journey times (25%), as are those who do not feel that the river is a barrier to trade on the other side (19%).

Chart 6.5: Predictability of road river crossings in East London by borough

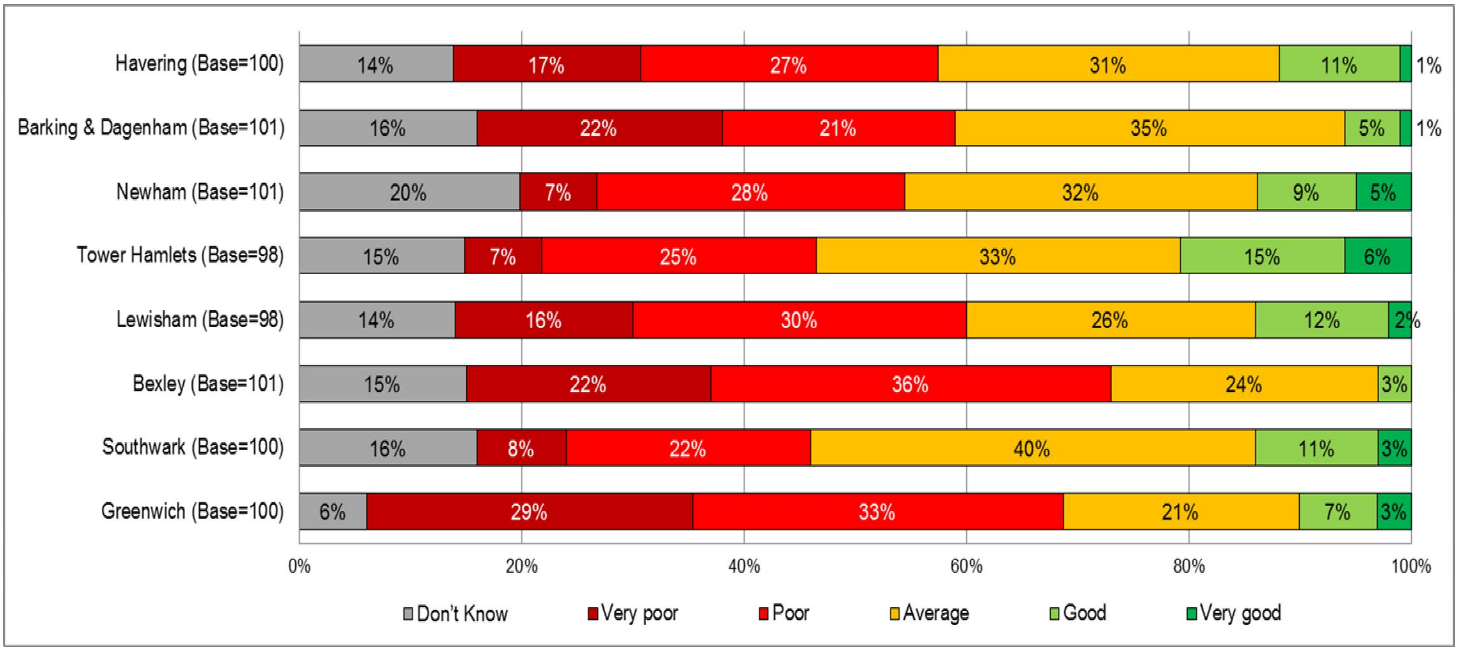
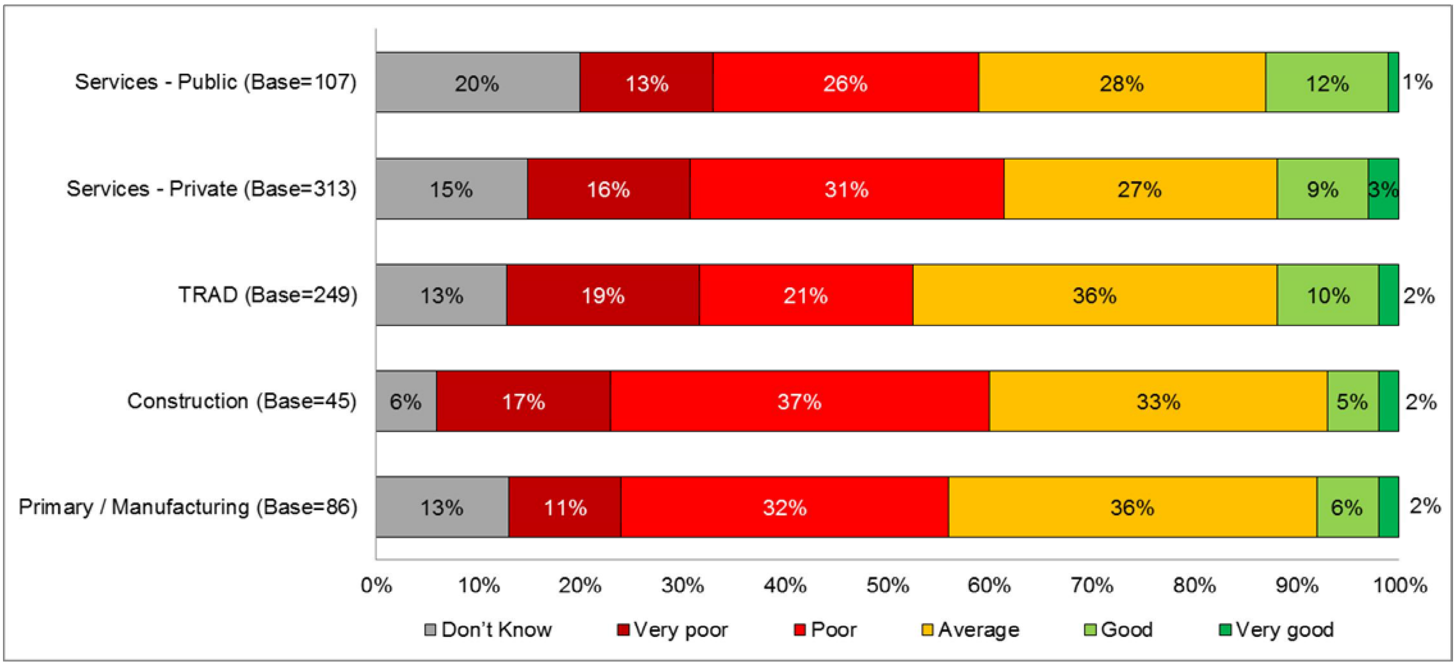


Chart 6.6: Predictability of road river crossings in East London by sector



6.3.4 Businesses located north of the river typically report journey times as more predictable than those to the south (north - 38% poor or very poor and 13% good or very good, compared with 49% and 10% respectively south of the river). The lowest perceived levels of predictability are in Greenwich, Bexley and Lewisham (total poor and very poor ratings are 62%, 58% and 46% of businesses respectively).

6.4 Cross-river issues

6.4.1 Companies were asked how much they are affected by various factors associated with crossing the river in East London, as shown in Chart 6.7 (south) and Chart 6.8 (north).

6.4.2 The main concern of businesses south of the river is unexpected delays (when incidents happen), which 72% state as causing disruption (38% noting as a major constraint). The impact is not reported to be quite as bad by businesses north of the river, with 68% saying it is a disruption (38% major constraint).

6.4.3 Reliability and daily congestion have a mixed response, with around 23-26% of firms both north of the river and south of the river stating that these are major constraints to their business. From the depth interviews, the main reason for less concern is that businesses have become resigned to the unpredictability and now rely heavily on radio and other real-time information sources to help plan their daily movements.

> '…you just have to live with it, and all our drivers keep in touch to find ways around major jams as soon as they can'

Chart 6.7: Disruption impacts associated with river crossing in east London (south of river, 398 businesses)

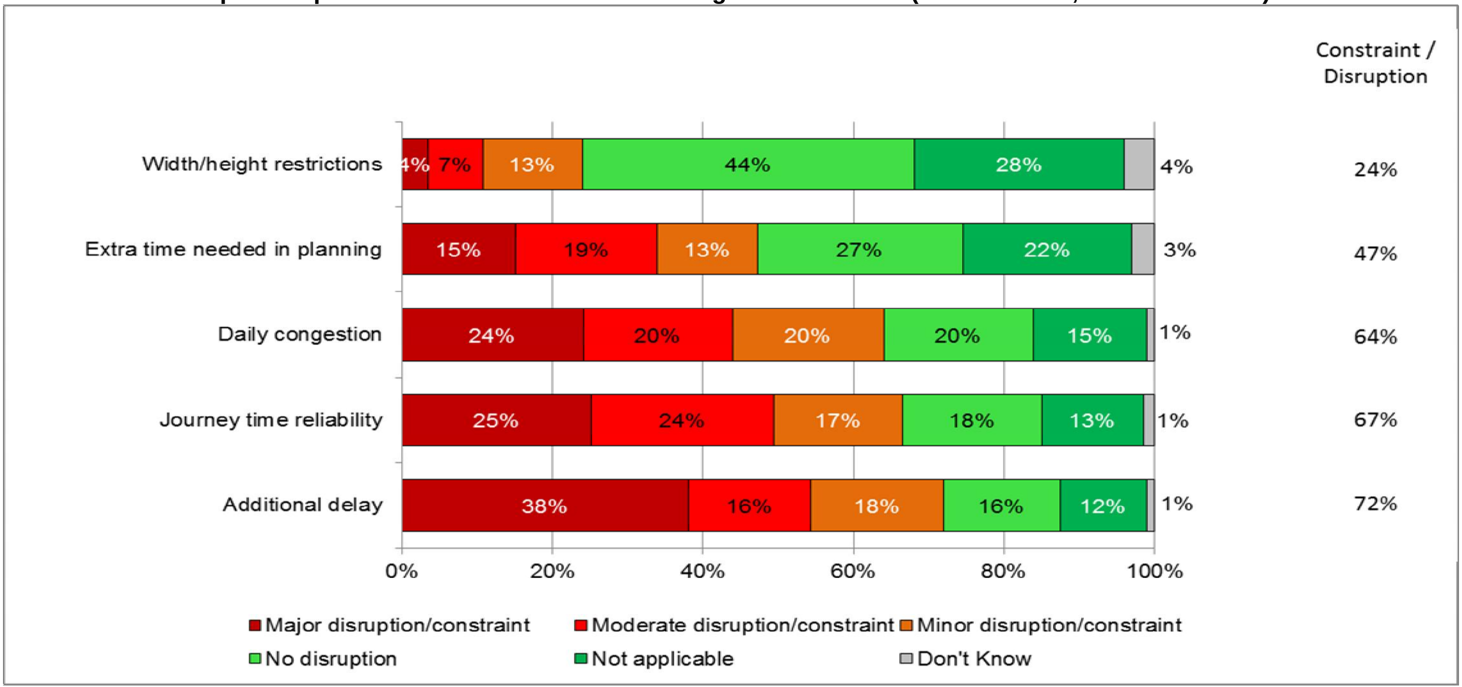
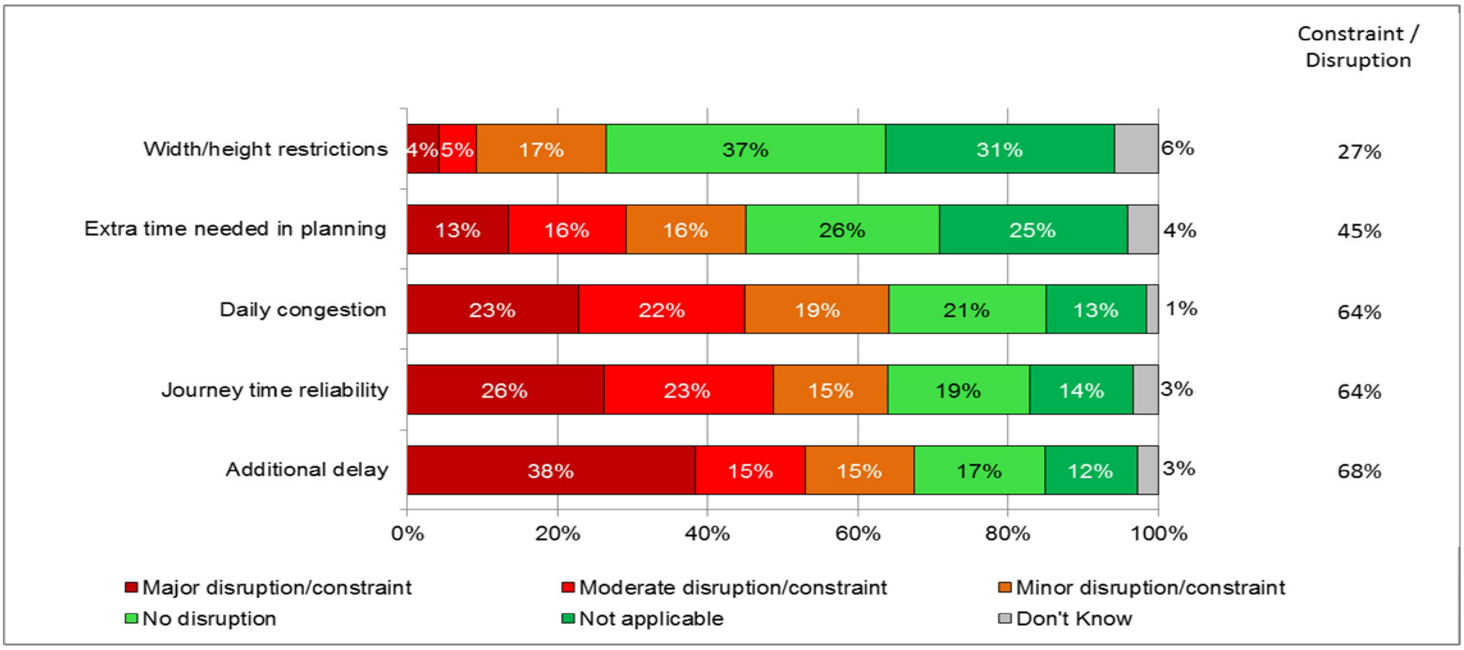


Chart 6.8: Disruption impacts associated with river crossing in East London (north of river, 402 businesses)



6.4.4 The majority (66%) of businesses in the construction sector suffer major disruption when incidents occur, as do 71% of those citing the river as a barrier to trade on the other side and around half of businesses located within 6km of a current crossing (45-50% depending on the crossing).

6.4.5 Amongst those businesses noting disruption associated with river crossing in East London (497 firms, 467 when weighted), the main impacts noted are:

- Late for meetings/appointments 47%
- Unhappy customers 29%
- Extra work in planning deliveries 12%
- Loss of revenue / business 11%
- Incur additional costs 8%
- Loss of man hours/productivity 6%
- Late deliveries 5%
- Failure to meet contracts 4%

7 Key findings - East London River Crossings Package

Businesses expect a strong positive economic effect from the East London River Crossings Package
The vast majority of businesses in East London (83%) expect it to improve the local economy overall.

Longer term recruitment trends are expected to be stronger if the East London River Crossings Package is implemented
Around half of businesses (49%) expect to recruit additional staff as a result of the investment, with firms in boroughs closest to the planned new crossings expressing a slightly greater impact - Greenwich (57%) and Newham (54%).

Freight and logistics is expected to benefit from the East London River Crossings Package
Around two thirds (65%) anticipate more efficient use of supplies and deliveries following implementation

Over half of firms would be happy to pay a reasonable charge (similar to that for the Dartford crossing) to cross the river if journey times became more reliable
59% of firms agreed or strongly agreed with this statement. Smartcard payment for freight was supported by 73% of respondents.

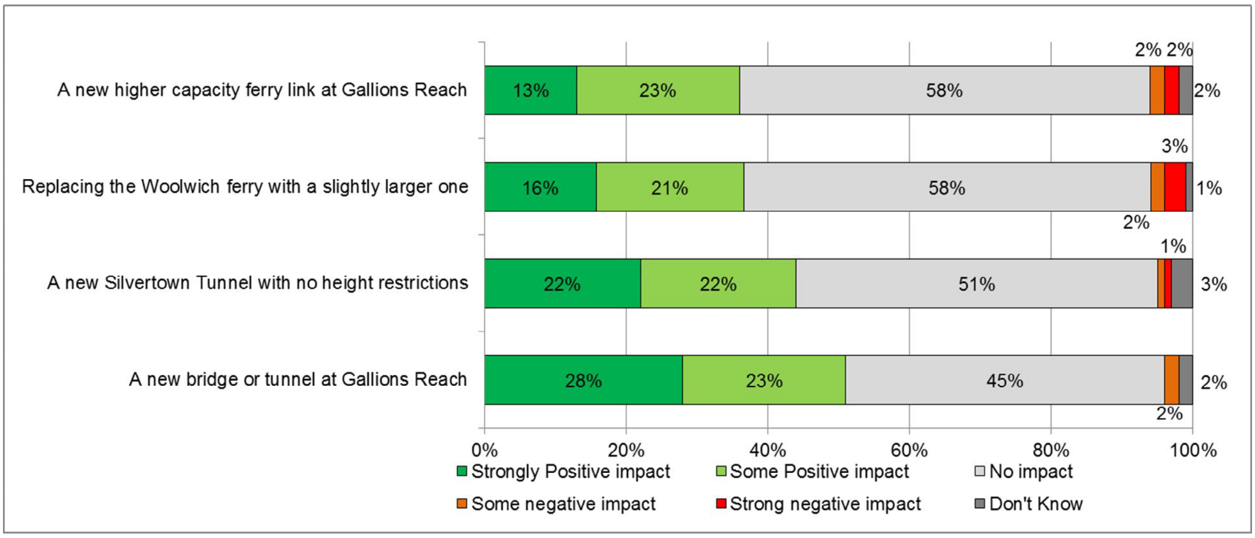
7.1 Levels of support for the different elements of the package

7.1.1 Businesses were provided with an overview of the East London River Crossings Package as follows:

> While there has been substantial investment in public transport across East London in recent years, there has been little to improve road or ferry capacity for vehicles to cross the river. 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. Options being considered include (with no height or weight restrictions):
>
> - New tunnel at Silvertown
> - New ferry/ tunnel /bridge at Gallions Reach, or an upgrade to existing Woolwich Ferry
>   - New ferry/ tunnel /bridge between Belvedere and Rainham (Havering and Bexley only).
>
> In order to fund new river crossings and manage travel demand, some form of charging is expected to be necessary. The charges are likely to be similar to those for the Dartford Crossing (which from Autumn 2013 are £2 for cars, £2.50 for two-axle goods vehicles and £5 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 need to be introduced for the Blackwall Tunnel.

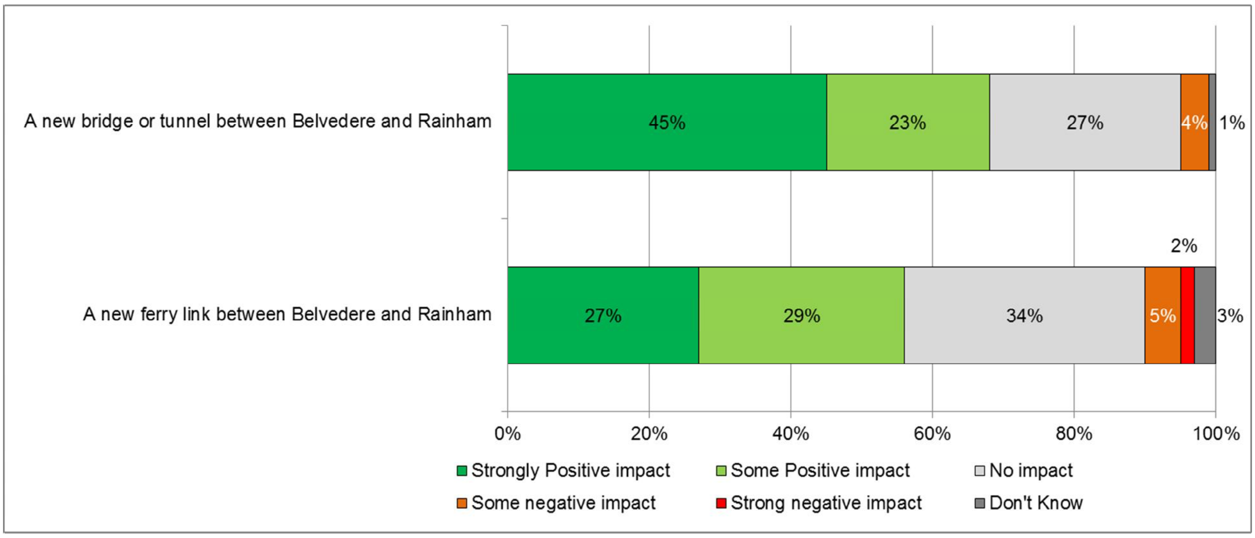
7.1.2 Firms were asked to assess the impacts they might expect from each of the proposed East London River Crossings, as shown in Chart 7.1. Four options were put forward to the boroughs interviewed in 2013, with a further two options also asked of respondents in 2014 from Havering and Bexley. Chart 7.1 shows the results for the original four options (amongst all 800 businesses interviewed) and Chart 7.2 shows the equivalent data for the two additional crossing options for Belvedere / Rainham (about which 154 businesses were interviewed in 2014).

Chart 7.1: Anticipated impact of each of the East London River Crossings Package options



Base: 800 Businesses interviewed in 2013 and 2014

Chart 7.2: Anticipated impact of the Belvedere to Rainham crossing options



Base: 154 Businesses interviewed in 2014 (100 Havering, 54 Bexley)

7.1.3 Overall, 62% felt that the crossings will have little impact on their own business, with those operating in Southwark or in the public service sector least likely to feel that they would be affected (73% and 70% respectively).

7.1.4 Amongst the first four options offered, businesses were most positive about the impact associated with a fixed-link at Gallions Reach (51%); followed by a new tunnel at Silvertown (44%); replacing the current Woolwich Ferry (37%) and a new ferry at Gallions Reach (36%). Very few voiced opposition to any of the schemes (c.4%), with the greatest dissent being amongst businesses in Greenwich against an expanded Woolwich Ferry (9%). Construction businesses also reported higher levels of opposition to the Woolwich Ferry option (10%).

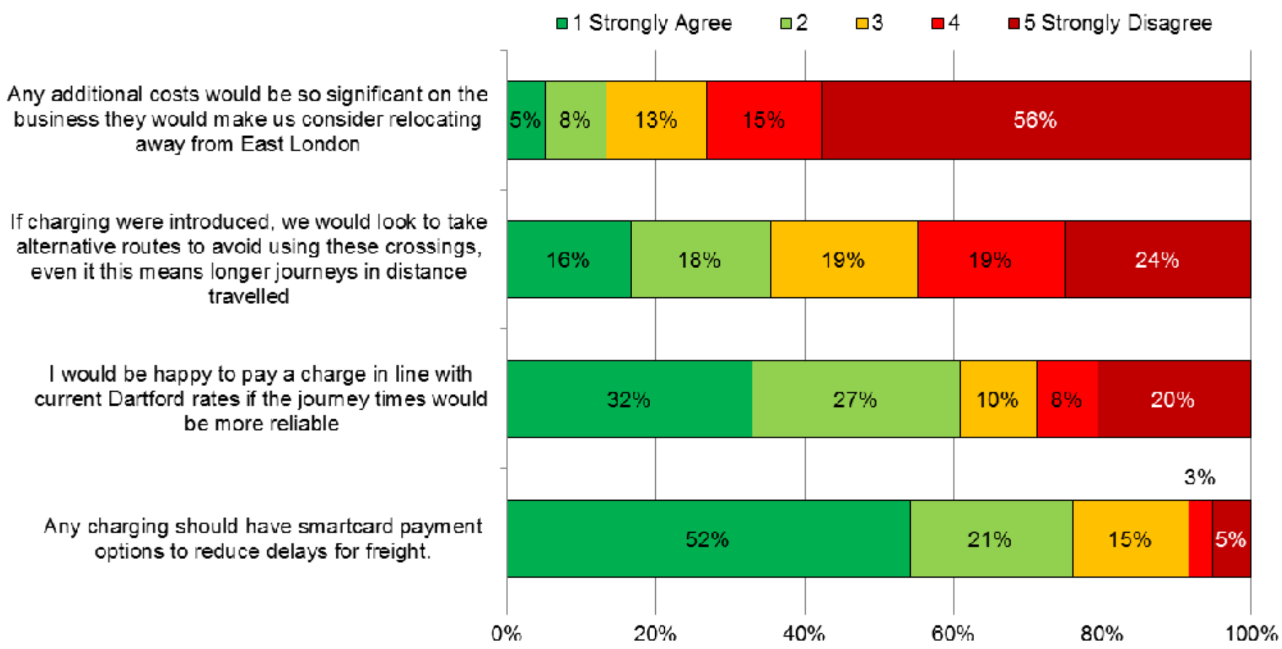
7.1.5 The fixed link at Gallions Reach was seen most positively by businesses in Newham (71%) and Greenwich (63%), while the Silvertown tunnel was best received by those operating from Greenwich (57%) and Newham (56%). Those operating in manufacturing or construction were most in favour of new fixed crossings at Silvertown (c.60%) and Gallions Reach (c.61%).

7.1.6 The option for a crossing between Belvedere and Rainham was well received, with 68% of businesses in Havering and Bexley noting a positive impact from a fixed link and 56% for a ferry in this area. Care should be taken, however, in comparing these results with those of the other crossings reviewed in 2013, since both Havering and Bexley border the Belvedere–Rainham crossing and are therefore more likely to experience positive impacts than those located further away.

7.1.7 To understand business' perspectives in more detail, attitudes were sought to a battery of statements relating to the East London River Crossings Package, as shown in Chart 7.3.

7.1.8 Given the premise that there would be a charge for all East London river crossings, it is of interest to note that just 13% of businesses said that the increase in costs would make them consider relocating away from the area. Smaller businesses were more inclined to this view (14% with 1-10 staff) than those employing over 50 staff (3%).

Chart 7.3: Attitudes towards potential impacts of the east London River Crossings Package



7.1.9 Attitudes were more varied in response to alternative routing, where 34% felt they would look to change route to avoid paying a charge to cross the river even if this was longer, with this rising to 46% amongst the construction sector.

7.1.10 A majority (59%) were willing to pay a charge in line with current Dartford rates for the new crossings if journey times were more reliable, with 28% opposed. Attitudes were consistent across sectors and boroughs, although those in Bexley were more positive than most (71%).

7.1.11 Businesses employing 11-49 staff were particularly willing to pay the charge, with 40% strongly agreeing. However, opinion in Greenwich was more balanced, with half happy to pay the charge, but 41%not. There was support for the charging mechanism to facilitate smartcard payment (73%).

7.2 Anticipated benefits from the East London River Crossings Package

7.2.1 The greatest benefits of the new crossings are anticipated to be improving the local economy (83%), and providing more predictable journey times (78%), with further benefits listed below in Chart 7.4.

7.2.2 Two thirds of firms (65%) expect that the package will facilitate more business from the other side of the river (irrespective of being located north or south of the river), with Newham perceiving this impact most strongly (82%).

7.2.3 Over half of firms see the package offering improvements for their employees of increased leisure time (54%), with this expected more widely in Greenwich (66%) and to a lesser extent in Southwark (45%) and Lewisham (48%). Similarly, just over half of businesses (51%) expect employees to have more reliable working hours, rising to 66% in Newham, in contrast to 40% in Havering.

Chart 7.4: Benefits from the east London River Crossings Package

7.2.4 As can be seen in Table 7.1, overleaf, Greenwich businesses are most expectant of improvements resulting from the ELRCP, with large numbers of businesses anticipating better predictability of journey times (90%), an improved local economy (87%), and more effective use of supplies/deliveries (75%).

Table 7.1: Expected impacts of the East London River Crossings Package (by borough)

Impact	Proportion of businesses expecting this impact								
	Greenwich	Southwark	Bexley	Lewisham	Tower Hamlets	Newham	Barking & Dagenham	Havering	Overall
Improve the local economy	87%	82%	77%	83%	88%	88%	76%	84%	**83%**
Have more predictable journey times	90%	75%	79%	79%	75%	78%	75%	70%	**78%**
More business coming from other side of the river	70%	56%	67%	58%	64%	82%	63%	56%	**65%**
More efficient use of supplies/ deliveries	75%	60%	68%	59%	63%	65%	62%	67%	**65%**
Staff have more time to enjoy leisure activities	66%	45%	60%	48%	60%	59%	51%	44%	**54%**
Staff have more reliable working hours	59%	44%	50%	51%	56%	66%	42%	40%	**51%**
Will recruit additional staff	57%	45%	51%	42%	51%	54%	47%	48%	**49%**
Expand your business in the area	53%	30%	48%	32%	43%	51%	40%	38%	**42%**
Unweighted row	101	99	101	97	98	102	102	100	800
Total	100	100	101	98	98	101	101	100	800

7.2.5 Half of businesses expect implementation of the package to lead to recruiting more staff, varying from 42% in Lewisham to 57% in Greenwich.

7.2.6 Expectation of impacts from the ELRCP do not vary significantly across sectors, with the construction sector thinking itself most likely to recruit further staff (59%) as well as to acknowledge improvements to staff leisure time (63%) and more reliable working hours (both 60%). Those operating in manufacturing and the TRAD sector have greatest expectation of improved effectiveness in deliveries and supplies (85% and 70% respectively).

Table 7.2: Expected impacts of the East London River Crossings Package (by sector)

Impact	Proportion of Businesses expecting this impact						
	Primary / Manufacturing	Construction	TRAD	Services (all)	Services (private)	Services (public)	Overall
Improve the local economy	82%	76%	81%	85%	85%	82%	**83%**
Have more predictable journey times	86%	86%	75%	77%	79%	73%	**78%**
More business coming from other side of the river	71%	59%	75%	60%	60%	61%	**65%**
More efficient use of supplies/deliveries	85%	65%	70%	61%	61%	60%	**65%**
Staff have more time to enjoy leisure activities	46%	63%	55%	54%	54%	53%	**54%**
Staff have more reliable working hours	48%	60%	51%	50%	51%	48%	**51%**
Will recruit additional staff	49%	59%	51%	48%	47%	52%	**49%**
Expand your business in the area	48%	43%	46%	39%	42%	31%	**42%**
Unweighted row	86	45	249	420	313	107	800
Total	40	48	216	496	383	113	800

APPENDIX A
Study area – enterprise based BRES 2011 Tables

Study Area - Enterprise Based 2011

Employees (BRES)

Size Band / Sector		Mining, quarrying & utilities (B,D and E)		Manufacturing (C)		Construction (F)		Motor trades (Part G)		Wholesale (Part G)		Retail (Part G)		Transport & storage (inc postal) (H)		Accommodation & food services (I)		Information & communication (J)		Financial & insurance (K)		Property (L)		Professional, scientific & technical (M)		Business administration & support services (N)		Public administration & defence (O)		Education (P)		Health (Q)		Arts, entertainment, recreation & other services (R,S,T and U)		Total
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	
0 to 9 employees	#	333	0%	4,011	4%	7,412	8%	1,659	2%	4,671	5%	10,696	12%	2,110	2%	7,470	8%	10,025	11%	2,244	2%	2,946	3%	14,020	16%	7,733	9%	14	0%	2,557	3%	5,552	6%	6,747	7%	90,200
	%	6%		19%		32%		29%		26%		22%		8%		25%		35%		16%		28%		26%		13%		0%		4%		9%		22%		17%
10 to 49 employees	#	643	1%	5,040	5%	5,958	6%	1,369	1%	5,668	6%	5,701	6%	3,195	3%	5,588	6%	8,724	9%	4,535	5%	2,353	2%	11,970	12%	9,405	10%	262	0%	6,294	7%	11,948	12%	7,108	7%	95,761
	%	11%		24%		26%		24%		32%		12%		12%		18%		30%		33%		22%		22%		16%		1%		10%		19%		23%		18%
50 to 249 employees	#	1,443	1%	4,199	2%	5,524	2%	774	0%	3,144	1%	5,704	2%	5,329	2%	10,074	4%	16,328	7%	70,731	30%	3,957	2%	19,615	8%	33,954	14%	8,021	3%	22,960	10%	19,576	8%	8,226	3%	239,559
	%	25%		20%		24%		14%		18%		12%		20%		33%		57%		514%		38%		36%		58%		22%		38%		30%		27%		45%
250 or more employees	#	4,055	1%	8,780	3%	8,427	3%	2,028	1%	6,146	2%	30,678	10%	18,456	6%	14,828	5%	10,326	3%	9,642	3%	4,741	2%	26,501	9%	31,848	10%	36,100	12%	43,474	14%	41,734	13%	13,376	4%	311,140
	%	69%		42%		36%		36%		34%		63%		71%		49%		36%		70%		45%		48%		54%		99%		71%		65%		44%		58%
Total		5,879	1%	20,974	4%	23,303	4%	5,666	1%	17,841	3%	48,738	9%	26,173	5%	30,262	6%	28,751	5%	13,755	3%	10,510	2%	54,880	10%	58,501	11%	36,468	7%	61,083	11%	64,333	12%	30,679	6%	537,796

Enterprises (UK Business Count)

Size Band / Sector		Mining, quarrying & utilities (B,D and E)		Manufacturing (C)		Construction (F)		Motor trades (Part G)		Wholesale (Part G)		Retail (Part G)		Transport & storage (inc postal) (H)		Accommodation & food services (I)		Information & communication (J)		Financial & insurance (K)		Property (L)		Professional, scientific & technical (M)		Business administration & support services (N)		Public administration & defence (O)		Education (P)		Health (Q)		Arts, entertainment, recreation & other services (R,S,T and U)		Total
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	
0 to 9 employees	#	125	0%	1,640	4%	4,320	10%	825	2%	2,185	5%	4,540	11%	1,125	3%	2,365	6%	5,685	13%	880	2%	1,320	3%	8,580	20%	3,270	8%	0	0%	615	1%	1,630	4%	3,280	8%	42,420
	%	96%		84%		94%		95%		87%		95%		88%		87%		95%		86%		93%		94%		87%		0%		69%		73%		90%		90%
10 to 49 employees	#	5	0%	275	7%	240	6%	45	1%	305	8%	225	6%	125	3%	300	8%	255	7%	75	2%	95	3%	440	12%	340	9%	0	0%	175	5%	495	13%	345	9%	3,740
	%	4%		14%		5%		5%		12%		5%		10%		11%		4%		7%		7%		5%		9%		0%		20%		22%		9%		8%
50 to 249 employees	#	0	0%	35	5%	45	7%	0	0%	15	2%	10	1%	30	4%	45	7%	50	7%	45	7%	10	1%	70	10%	110	16%	0	0%	95	14%	95	14%	30	4%	685
	%	0%		2%		1%		0%		1%		0%		2%		2%		1%		4%		1%		1%		3%		0%		11%		4%		1%		1%
250 or more employees	#	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	15	13%	20	17%	0	0%	25	21%	25	21%	5	4%	5	4%	20	17%	5	4%	120
	%	0%		0%		0%		0%		0%		0%		0%		0%		0%		2%		0%		0%		1%		100%		1%		1%		0%		0%
Total		130	0%	1,950	4%	4,605	10%	870	2%	2,505	5%	4,775	10%	1,280	3%	2,710	6%	6,005	13%	1,020	2%	1,425	3%	9,115	19%	3,745	8%	5	0%	890	2%	2,240	5%	3,660	8%	46,965

Study Area - Workplace Based 2011

Employees (BRES)

Size Band / Sector		Mining, quarrying & utilities (B,D and E)		Manufacturing (C)		Construction (F)		Motor trades (Part G)		Wholesale (Part G)		Retail (Part G)		Transport & storage (inc postal) (H)		Accommodation & food services (I)		Information & communication (J)		Financial & insurance (K)		Property (L)		Professional, scientific & technical (M)		Business administration & support services (N)		Public administration & defence (O)		Education (P)		Health (Q)		Arts, entertainment, recreation & other services (R,S,T and U)		Total
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	
0 to 9 employees	#	454	0%	4,140	4%	7,965	7%	2,072	2%	5,631	5%	15,767	14%	3,111	3%	10,015	9%	11,302	10%	2,649	2%	4,036	4%	15,499	14%	9,993	9%	1,290	1%	2,158	2%	8,039	7%	9,790	9%	113,911
	%	7%		18%		28%		34%		27%		29%		10%		25%		23%		3%		27%		21%		12%		3%		3%		10%		27%		15%
10 to 49 employees	#	1,428	1%	6,253	4%	6,829	4%	2,655	2%	8,631	5%	18,662	12%	5,728	4%	16,697	10%	8,219	5%	5,704	4%	3,645	2%	12,529	8%	12,684	8%	4,632	3%	12,779	8%	21,445	13%	10,876	7%	159,396
	%	22%		27%		24%		44%		41%		34%		19%		42%		17%		7%		25%		17%		15%		10%		17%		27%		30%		21%
50 to 249 employees	#	3,440	2%	5,283	3%	8,398	4%	922	0%	4,864	3%	11,308	6%	10,224	5%	11,100	6%	11,200	6%	7,798	4%	3,826	2%	14,075	7%	23,049	12%	8,931	5%	39,638	20%	19,896	10%	9,506	5%	193,458
	%	53%		23%		30%		15%		23%		21%		34%		28%		23%		9%		26%		19%		27%		20%		52%		25%		26%		26%
250 or more employees	#	1,199	0%	7,131	2%	4,927	2%	413	0%	1,915	1%	9,197	3%	10,700	4%	1,813	1%	17,740	6%	71,604	25%	3,232	1%	33,416	12%	38,729	13%	29,544	10%	21,047	7%	30,178	10%	6,527	2%	289,312
	%	18%		31%		18%		7%		9%		17%		36%		5%		37%		82%		22%		44%		46%		67%		28%		38%		18%		38%
Total		6,518	1%	22,805	3%	28,121	4%	6,061	1%	21,040	3%	54,935	7%	29,763	4%	39,624	5%	48,462	6%	87,753	12%	14,738	2%	75,519	10%	84,454	11%	44,397	6%	75,624	10%	79,559	11%	36,697	5%	756,070

Workplaces (UK Business Count)

Size Band / Sector		Mining, quarrying & utilities (B,D and E)		Manufacturing (C)		Construction (F)		Motor trades (Part G)		Wholesale (Part G)		Retail (Part G)		Transport & storage (inc postal) (H)		Accommodation & food services (I)		Information & communication (J)		Financial & insurance (K)		Property (L)		Professional, scientific & technical (M)		Business administration & support services (N)		Public administration & defence (O)		Education (P)		Health (Q)		Arts, entertainment, recreation & other services (R,S,T and U)		Total
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	
0 to 9 employees	#	155	0%	1,785	4%	4,575	9%	905	2%	2,490	5%	5,390	11%	1,375	3%	2,735	6%	5,805	12%	1,235	3%	1,635	3%	8,670	18%	3,910	8%	250	1%	735	2%	2,460	5%	4,095	8%	48,240
	%	76%		84%		92%		90%		84%		85%		80%		76%		93%		74%		88%		93%		83%		42%		47%		67%		88%		84%
10 to 49 employees	#	45	1%	300	4%	330	5%	105	1%	430	6%	810	11%	245	3%	755	11%	320	5%	335	5%	190	3%	560	8%	550	8%	200	3%	410	6%	990	14%	480	7%	7,055
	%	22%		14%		7%		10%		14%		13%		14%		21%		5%		20%		10%		6%		12%		33%		26%		27%		10%		12%
50 to 249 employees	#	5	0%	50	3%	80	4%	0	0%	55	3%	110	6%	105	6%	105	6%	95	5%	65	4%	35	2%	110	6%	190	11%	120	7%	400	22%	200	11%	80	4%	1,805
	%	2%		2%		2%		0%		2%		2%		6%		3%		2%		4%		2%		1%		4%		20%		25%		5%		2%		3%
250 or more employees	#	0	0%	0	0%	0	0%	0	0%	0	0%	10	5%	0	0%	0	0%	20	10%	35	18%	0	0%	25	13%	35	18%	30	15%	30	15%	10	5%	0	0%	195
	%	0%		0%		0%		0%		0%		0%		0%		0%		0%		2%		0%		0%		1%		5%		2%		0%		0%		0%
Total		205	0%	2,135	4%	4,985	9%	1,010	2%	2,975	5%	6,320	11%	1,725	3%	3,595	6%	6,240	11%	1,670	3%	1,860	3%	9,365	16%	4,685	8%	600	1%	1,575	3%	3,660	6%	4,655	8%	57,295

APPENDIX B
Final Questionnaire

S Screener

ASK TELEPHONIST

S1 **Good morning / afternoon. My name is NAME and I'm calling from IFF Research on behalf of Transport for London. Please can I speak to the person within your organisation who is responsible for the profitability 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	CLOSE
Refusal – company policy	5	
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 / Answer phone	11	
Residential Number	12	
Dead line	13	
Company closed	14	

ASK ALL

S2 **Good morning / afternoon, my name is NAME, calling from IFF Research, an independent market research company. 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 from a package of new river crossings in east London.**

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 east London River Crossings package on the local business community and to understand how the river crossings can play their part in supporting growth and regeneration.

I would like to spend the next 20 minutes completing the interview with you…

Continue	1	CONTINUE
Referred to someone else at establishment NAME: JOB TITLE:	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	

S5 This call may be recorded for quality and training purposes only.

ASK ALL

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 S6
No	2	
Don't know	3	

ASK IF S3=2/3 (NO OR DON'T KNOW)

S4 Is your premises within any of the following London boroughs?

DP: DO NOT SHOW BOROUGH ASKED ABOUT AT S3

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

ASK ALL

S6 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		
Don't know	1	
Refused	2	

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES

1 -10	
11 - 49	
50 - 199	
200+	
Don't Know	
Refused	

ASK ALL

S7 Approximately how many of these staff work each of:

Full Time (30 Hours a Week or More)	RECORD NUMBER
Part Time (Less than 30 hours a week)	RECORD NUMBER

CATI CHECK SUMS THAT NUMBER DOES NOT EXCEED GIVEN IN SCREENER S6

ASK ALL

S8 I have [SECTOR ON SAMPLE] **as a general classification for your establishment. Does this sound about right?**

Yes	1	
No	2	GO TO S9
Don't know	3	GO TO S9

ASK IF S8=2 OR 3 (NO OR DON'T KNOW)

S9 And which of the following best describes the type of business that your company operates here?
DP: ONLY SHOW SECTORS NOT ASKED ABOUT AT S8

Manufacturing/Primary	1	
Construction	2	
Retail, hospitality, transport or distribution	3	
Services (i.e. no physical goods produced or sold	4	
None of these	5	THANK AND CLOSE
Don't know	6	THANK AND CLOSE

ASK ONLY IF SERVICES SIC CODE (FROM S8 AND S9)

S10 Is your business in the public or private sector?
READ OUT. SINGLE CODE.

A public sector organisation	1	
A private company	2	
Other (SPECIFY)	3	

REASSURANCES AND HOW TO VERIFY STUDY IF NECESSARY

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

ASK ALL
A1 **This section asks about the size and nature of your business.**

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

a) Business Name:

b) Respondents Name:

c) Respondents Job Title:

WRITE IN

A1A DELETED
A1B DELETED

ASK ALL
A2 **Are any of the following the main activity of your business?**
READ OUT. SINGLE CODE.

Waste collection, treatment and disposal activities; mate-	1	
Land transport and transport via pipelines	2	
Water or Air Transport	3	
Warehousing and support activities for transportation	4	
Postal and courier activities	5	
Wholesale trade, except of motor vehicles and motorcy-	6	
Manufacture	7	
None of the above	8	
Don’t know	9	

A3 **DELETED**
A4 **DELETED**

A5 **DELETED**

ASK ALL
A6 **Approximately what proportion of staff working at this site do you think travel to work by using:**
WRITE IN % OR NUMBER

DP: WILL NEED TO SELECT WHETHER % OR NUMBER AND THEN ENTER. NEED TO APPLY RELEVANT CHECK

Walking or cycling?	RECORD % OR NUMBER
Private road Vehicle? [Car, Van or Motorcycle]	RECORD % OR NUMBER
Public Transport? [Bus, Tube, Overground Rail, DLR, Passenger Ferry]	RECORD % OR NUMBER
Other	RECORD % OR NUMBER
Don't know	

CATI CHECK SUMS TO 100% OR THAT NUMBER DOES NOT EXCEED GIVEN IN SCREENER S6

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

WRITE IN % OR NUMBER, **DP: WILL NEED TO SELECT WHETHER % or NUMBER and then enter. need to apply relevant check**

	Locally [In your borough [BOROUGH] or a nearby borough. Not across the river]	**Elsewhere in Greater London**	**Outside Greater London**
%	1	1	1
Number	2	2	2
Don't know	X	X	X

CATI CHECK SUMS TO 100% OR THAT NUMBER DOES NOT EXCEED GIVEN IN SCREENER S6
A8 **DELETED**

ASK ALL
Approximately how many new staff do you typically recruit each year? [We are interested in the number of new starters]

WRITE IN NUMBER		
Don't know	1	
Refused	2	
None	3	GO TO A13

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES

None	GO TO A13
1 – 10	
11 – 25	
26 – 50	
51 – 100	
101+	
Don't Know	
Refused	

ASK IF ANSWER OTHER THAN NONE GIVEN AT A9

A9 **Do you experience any difficulty recruiting staff in this location?**

Yes	1	
No	2	
Don't know	3	
Refused	4	

ASK IF DO EXPERIENCE DIFFICULTY (A10=1)

A10 **Please explain why you have problems recruiting staff?**

OPEN TEXT, PROBE. IF APPROPRIATE PROMPT ON IMPORTANCE OF PROXIMITY TO WORK-FORCE, NATURE OF SKILLS SHORTAGES

WRITE IN

A11 **DELETED**

ASK ALL

A12 **What overall 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

Less than £50,000	
£50,001 to £100,000	
£100,001 to £500,000	
£500,001 to £1m	
>£1m to £5m	
>£5m to £10m	
>£10m to £20m	
>£20m to £100m	
Over £100m	
Don't Know	
Refused	

ASK ALL

A13 **Does your business also operate from other sites or premises?**

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

ASK IF ALSO OPERATES FROM OTHER SITES (A14=1)

A14 **How many other premises does your business operate from?**

WRITE IN NUMBER		
Don't know	1	
Refused	2	

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES

1 - 2	
3 - 10	
11 – 20	
>20	
Don't Know	
Refused	

ASK IF ALSO OPERATES FROM OTHER SITES (A14=1)

A15 **Where are they located?**

CODE ALL THAT APPLY AND RECORD ANY ACTUAL LOCATIONS MENTIONED

In borough [BOROUGH]	1	
In south London	2	
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	

B The last 12 months

ASK ALL

B1 **This section contains a few questions about how your business has changed over the last 12 months…**

Over the last 12 months do you consider your business to have been growing, decling or static in terms of turnover?

SINGLE CODE

Growing	1	
Static (about the same)	4	
Declining	6	
Don’t know	7	
Refused	8	

ASK ALL

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

SINGLE CODE.

Increased by more than 10%	1	
Increased by up to 10%	2	
Stayed about the same	3	
Decreased by up to 10%	4	
Decreased by more than 10%	5	
Don’t know	6	
Refused	7	

ASK ALL

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

SINGLE CODE.

Increased by more than 10%	1	
Increased by up to 10%	2	
Stayed about the same	3	
Decreased by up to 10%	4	
Decreased by more than 10%	5	
Don't know	6	
Refused	7	

C Business expectations for the next 12 months

ASK ALL

C1 **This section asks about your expectations for your business at this site over the next 12 months…**

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

SINGLE CODE

Grow	1	
Remain static (about the same)	4	
Decline	6	
Don't know	7	
Refused	8	

ASK ALL

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

SINGLE CODE

Increase by more than 10%	1	
Increase by up to 10%	2	
Stay about the same	3	
Decrease by up to 10%	4	
Decrease by more than 10%	5	
Don't know	6	
Refused	7	

ASK ALL

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

SINGLE CODE

Increase by more than 10%	1	
Increase by up to 10%	2	
Stay about the same	3	
Decrease by up to 10%	4	
Decrease by more than 10%	5	
Don't know	6	
Refused	7	

ASK ALL UNLESS REFUSED (C3=1-2)

C4 **A Why do you say that?**

DO NOT READ OUT

Cheaper imports from China mean have to cut margins	1	
Other (WRITE IN)	2	
Don't know	3	

ASK ALL UNLESS REFUSED (C3=3)

C4 B Why do you say that?

DO NOT READ OUT

Cheaper imports from China mean have to cut margins	1	
Other (WRITE IN)	2	
Don't know	3	

ASK ALL UNLESS REFUSED (C3=4-5)

C4 C Why do you say that?

DO NOT READ OUT

Cheaper imports from China mean have to cut margins	1	
Other (WRITE IN)	2	
Don't know	3	

D Location

ASK ALL
D1 **Thinking specifically about your business at this site ….**

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

WRITE IN YEAR		
Don't know	1	

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES

Since 2010	1
Between 2001 and 2010	2
Between 1991 and 2000	3
Before 1990	4
Don't Know	5

ASK IF BUSINESS STARTED SINCE 2010 (D1_RANGE=1)
D2 **Which of the following best describes the opening of your premises here?**
READ OUT. SINGLE CODE.

Completely new business when opened here	1	
Business expanding into area (first site in area)	2	
Business relocating into the area	3	
Business expanding within area (additional site in area)	4	
Business relocating within the area	5	
Don't know	6	

ASK ALL
D3 **Please describe the three main benefits of your current business location:**
DO NOT READ OUT. CODE THREE ONLY.

Affordability of site / premises	1	Site Specific
Security of lease	2	Site Specific
Anticipated increase in land values	3	Site Specific
Quality / suitability of current premises	4	Site Specific
Size of premises	5	Site Specific
Ease of access by road (inc motorways)	8	Accessibility
Ease of access by public transport	10	Accessibility
Ease of access on foot or by cycle	11	Accessibility

Availability of appropriately skilled employees	12	Staff
Availability of affordable housing	13	Staff
Ease of transport / haulage	14	Accessibility
Proximity to east London River Crossings	45	Accessibility
Proximity to suppliers	16	Site Specific
Ease of access by staff	18	Staff
Proximity to businesses in same sector	20	Site Specific
Other (SPECIFY)	21	
DON'T KNOW	22	

ASK ALL

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

DO NOT READ OUT. CODE THREE ONLY.

Affordability of site / premises	1	Site Specific
Security of lease	2	Site Specific
Anticipated increase in land values forcing business out of area	3	Site Specific
Quality / suitability of current premises	4	Site Specific
Size of premises	5	Site Specific
Difficulty of access by road	6	Accessibility
Difficult to access other side of River Thames	7	Accessibility
Difficulty of access by public transport	8	Accessibility
Local congestion, time wasted in traffic	9	Accessibility
Difficulty recruiting appropriately skilled employees	11	Staffing
Difficulty attracting staff due to location	12	Staffing
Difficulty retaining staff due to location	13	Staffing
Lack of affordable housing	14	Staffing
Difficulty of transport / haulage		Accessibility
Reliability of east London River Crossings	17	Accessibility
Remote from markets	18	Accessibility
Crime	19	Site Specific
Other (SPECIFY)	21	
Don't know	22	

ASK ALL

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.

	Not at all important				Very important	DK
_1 **Characteristics of your Premises [Such as operating space, cost, quality]**	1	2	3	4	5	6
_2 Relevant **labour and availability**	1	2	3	4	5	6
_3 **Receiving or dispatching supplies / goods**	1	2	3	4	5	6
_4 **Ease of access to this site by customers or visitors**	1	2	3	4	5	6
_5 **Ease of access from this site to customers, clients or markets**	1	2	3	4	5	6
_6 **Proximity of other companies in the same sector**	1	2	3	4	5	6

ASK ALL

D6 **To what extent have these issues caused you problems, 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.

	No problem at all				Very significant problem	DK
Characteristics of your Premises [Such as operating space, cost, quality]	1	2	3	4	5	6
Relevant labour and availability	1	2	3	4	5	6
Receiving or dispatching supplies / goods	1	2	3	4	5	6
Ease of access to this site by customers or visitors	1	2	3	4	5	6
Ease of access from this site to customers, clients or markets	1	2	3	4	5	6
Proximity of other companies in the same sector	1	2	3	4	5	6

ASK ALL

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

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

ASK IF EXPECT BUSINESS TO MOVE (D7=1)

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?**

Yes, found somewhere within South/east London	1	
Yes, will expect to find suitable premises within	2	

South/east London		
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	
Don't know	6	GO TO SECTION E

ASK IF NOT 'DON'T KNOW' (D8=1–3)
D9 **Why do you say that?**
PROMPT TO UNDERSTAND FACTORS SUCH AS SIZE, CONDITION, VACANCY, COST, ACCESSIBILITY OF LAND, SPACE FOR ANY EXPANSION OR CONSTRUCTION OF NEW PREMISES, ANY OTHER REQUIREMENTS PARTICULAR TO THE BUSINESS.

DO NOT READ OUT

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	
Other (WRITE IN)	4	
Don't know	5	

E Proximity to other firms in the same sector

ASK IF PROXIMITY OF OTHER FIRMS IN SAME SECTOR IS IMPORTANT (D5_6=4/5)
E1 **Please explain why proximity to other firms in the same sector is important to your business?**
OPEN TEXT. PROMPT IF NECESSARY. DO THEY COLLABORATE WITH OTHER FIRMS? DO THEY SEEK TO LOCATE AWAY FROM COMPETITORS?

WRITE IN

F Location of principle competitors

ASK ALL

F1 **Where are your principal competitors based?**

PROMPT IF NECESSARY. CODE ALL THAT APPLY

Greenwich		
Southwark		
Bexley		
Lewisham		
Tower Hamlets		
Newham		
Barking & Dagenham		
Havering		
Elsewhere in Greater London		
South east England Outside London		
South West		
Midlands		
north West		
Wales		
Scotland		
Ireland		
In Europe		
Rest of the World		
Don't know		

G Deliveries

ASK ALL

G1 **This section asks about the movement of goods, materials and supplies into and out of your site…**

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

WRITE IN PERCENTAGE (%)		
WRITE IN VALUE IN GBP (£)		
Don't know	1	
Refused	2	
None	3	GO TO G3 (IF RELE-VANT

CATI CHECK IF GIVE VALUE SO THAT NUMBER DOES NOT EXCEED TURNOVER GIVEN AT A13

ASK IF GIVE ANSWER AT G1 THAT IS NOT 'NONE'
G2 **Do you carry your own goods or use a haulage Company?**
CODE ALL THAT APPLY

Carry own goods	1	
Use a haulage company	2	
Do not transport goods	3	
(DO NOT READ OUT) Don't know	4	

ASK IF RECEIVING/DISPATCHING SUPPLIES/GOODS IS IMPORTANT (D5_3=4/5)
G3 **Where are your principal suppliers located?**
PROMPT IF NECESSARY AND CODE ALL THAT APPLY

Greenwich		
Southwark		
Bexley		
Lewisham		
Tower Hamlets		
Newham		
Barking & Dagenham		
Havering		
Elsewhere in Greater London		
South east England Outside London		
South West		
Midlands		
north West		
Wales		
Scotland		
Ireland		
In Europe		
Rest of the World		
Don't know		

ASK IF RECEIVING/DISPATCHING SUPPLIES/GOODS IS IMPORTANT (D5_3=4/5)
G4 **Approximately how many inbound deliveries arrive at your site per week?**

WRITE IN NUMBER		
Don't know	1	
Refused	2	

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

None	
1 – 10	
11 – 25	
26 – 50	
51 - 100	
101 – 500	
501 – 1,000	
1,001 – 5,000	
Over 5,000	
Don't Know	
Refused	

ASK IF RECEIVING/DISPATCHING SUPPLIES/GOODS IS IMPORTANT (D5_3=4/5)
G5 **And approximately how many outbound deliveries leave your site per week?**

WRITE IN		
Don't know	1	
Refused	2	

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

None	
1 – 10	
11 – 25	
26 – 50	
51 - 100	
101 – 500	
501 – 1,000	
1,001 – 5,000	
Over 5,000	
Don't Know	
Refused	

H Problems with deliveries into and out of this site

ASK IF RECEIVING OR DISPATCHING SUPPLIES/GOODS ARE A PROBLEM (D6_3=4/5)
H1 **Please describe the nature of problems you face with deliveries to or from this site?**
DO NOT PROMPT, CODE ALL WHICH APPLY, RECORD OTHER RESPONSES

Reliability of suppliers	1	Business related
Reliability of haulage company	2	Business related
Congestion locally	3	Traffic related
Congestion more widely (Greater London or beyond)	4	Traffic related
Delays on the road network due to incidents	5	Traffic related
Crossing the River Thames	6	Traffic related
Availability of labour (e.g. drivers or handlers)	7	Staff related
Other labour factors (e.g. reliability / quality of drivers / handlers)	8	Staff related
Localised access issues at the site itself	9	Site related
Volume of goods	10	Site related
Cost of Haulage	11	Costs related
Proximity to suppliers	12	Business related
Weight limits / restrictions	13	Vehicle related
Height limits / restrictions	14	Vehicle related
Congestion charge	15	Costs related
Other tolls (e.g. Dartford Crossing)	16	Costs related
Low emissions zone	17	Vehicle related
Export or import factors (e.g. moving goods into or out of the UK)	18	Business related
Parking	19	Site related
Poor traffic management (e.g. traffic lights)	20	Traffic related
Scheduling for deliveries to avoid peak hours (congestion)	21	Traffic related
Location of main clients/customers	22	Site related
Other (SPECIFY)	23	
Don't know	24	

I Location of principle customers and clients

ASK IF EASE OF ACCESS TO/FROM SITE IS IMPORTANT (D5_4=4/5 OR D5_5=4/5

I1 **Where are your principal customers / clients located?**

PROMPT IF NECESSARY AND CODE ALL THAT APPLY

Greenwich		
Southwark		
Bexley		
Lewisham		
Tower Hamlets		
Newham		
Barking & Dagenham		
Havering		
Elsewhere in Greater London		
South east England Outside London		
South West		
Midlands		
north West		
Wales		
Scotland		
Ireland		
In Europe		
Rest of the World		
Don’t know		

ASK IF EASE OF ACCESS TO/FROM SITE IS IMPORTANT (D5_4=4/5 OR D5_5=4/5

I2 **Approximately how many visitors / customers (excluding deliveries) arrive at your site per week?**

WRITE IN NUMBER		
Don't know	1	
Refused	2	
None	3	GO TO J1 (if relevant)

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES

None	GO TO J1 (IF RELEVANT)
1 – 10	
11 – 25	
26 – 50	
51 – 100	
101 – 500	
501 – 1,000	
1,001 – 5,000	
Over 5,000	
Don't Know	
Refused	

ASK IF EASE OF ACCESS TO/FROM SITE IS IMPORTANT (D5_4=4/5 OR D5_5=4/5) AND ANSWER OTHER THAN NONE GIVEN AT I2

I3 **What proportion of visitors/customers do you think get to your site by road?**

WRITE IN %		
Don't know	1	

J Business trips from this site

ASK IF EASE OF ACCESS FROM SITE TO CUSTOMERS/CLIENTS/MARKETS IS IMPORTANT (D5_5=4/5)

J1 **Approximately how many staff business trips (excluding goods movements) depart from your site per week?**

WRITE IN NUMBER		
Don't know	1	
Refused	2	
None	3	GO TO K1

IF DON'T KNOW EXACT NUMBER – PROMPT WITH RANGES

None	GO TO K1
1 – 10	
11 – 25	
26 – 50	
51 – 100	
101 – 500	
501 – 1,000	
1,001 – 5,000	
Over 5,000	
Don't Know	
Refused	

ASK IF EASE OF ACCESS FROM SITE TO CUSTOMERS/CLIENTS/MARKETS IS IMPORTANT (D5_5=4/5)

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

WRITE IN %		
Don't know	1	

K Reliance on Crossing the River Thames in east London

ASK ALL

K1 **Continuing to think specifically about operation of your business at this site…**

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

Essential	1	
Very important	2	
Important	3	
Slightly important	4	
Not important	5	
Don't know	6	

ASK ALL

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

Yes	1	
No	2	
Don't know	3	

ASK ALL

K2 **How predictable do you think journey times currently are for road traffic crossing the River Thames in east London?**

READ OUT SCALE. CODE ONE ONLY.

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

ASK ALL

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.

	Major disruption / constraint	**Moderate disruption / constraint**	**Minor disruption / constraint**	**No disruption**	**Not applicable**	**DK**
Daily congestion	1	2	3	4	5	8
Additional delay when incidents happen at river crossings	1	2	3	4	5	8
Reliability of journey times crossing the river	1	2	3	4	5	8
Width and height restrictions at existing river crossings	1	2	3	4	5	8
5 Time needed in planning deliveries to avoid congestion	1	2	3	4	5	8

ASK IF EXPERIENCE ANY MAJOR / MODERATE DISRUPTION (K3_1-4=1/2)
K4 **Please explain the consequences of these disruptions to your business:**
DO NOT READ OUT. CODE ALL THAT APPLY

Need to plan deliveries direct from suppliers where possible	1	
Will only cross river at certain times of day	2	
Can be late for meetings/appointments	3	
Unhappy customers	4	
Other (WRITE IN)	5	
Don't know	6	

L east London River Crossings Package

While there has been substantial investment in public transport across east London in recent years, there has been little to improve road or ferry capacity for vehicles to cross the river. The Woolwich Ferry is nearing the end of its lifespan and some of the existing crossings 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. Options being considered include:

- **A new tunnel at Silvertown; and**
- **A new ferry, tunnel or bridge at Gallions Reach. Or an upgrade to existing Woolwich Ferry**
- **A new ferry, tunnel or bridge between Belvedere and Rainham [HAVERING AND EXTRA BEXLEY INTERVIEWS ONLY]**

All of these will have no height or weight restrictions. In order to fund new river crossings and manage travel demand some form of charging is expected to be necessary. The charges are likely to be similar to those for the Dartford crossing (which from Autumn 2013 are £2 for cars, £2.50 for two-axle goods vehicles and £5 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 need to be introduced for the Blackwall Tunnel.

ASK ALL

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

	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	1	2	3	4	5	6
A new higher capacity Ferry link at Gallions Reach	1	2	3	4	5	6
A new bridge or tunnel at Gallions Reach	1	2	3	4	5	6
Replacing the Woolwich ferry with a slightly larger one	1	2	3	4	5	6
A new ferry at Belvedere-Rainham	1	2	3	4	5	6
A new bridge or tunnel at Belvedere-Rainham	1	2	3	4	5	6

ASK ALL

L1 **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.

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

DP ROTATE ORDER OF STATEMENTS

	Strongly agree				Strongly disagree	DK
The current crossing options are adequate and there is no need to further increase capacity	1	2	3	4	5	6
Unpredictable journey times crossing the river cause loss in revenue	1	2	3	4	5	6
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	1	2	3	4	5	6
My business is not greatly influenced by cross river traffic so it would have little impact	1	2	3	4	5	6
I would be happy to pay a charge in line with current Dartford rates if the journey times would be more reliable	1	2	3	4	5	6
Any additional costs would be so significant on the business they would make us consider relocating away from east London	1	2	3	4	5	6
Any charges should have smartcard payment options to reduce delays for freight	1	2	3	4	5	6

L2 **DELETED**

L3 **DELETED**

ASK ALL

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**

READ OUT CODE ALL THAT APPLY

Improve the local economy	1
Will recruit additional staff	2
Expand your business in the area	3
Have more predictable journey times	4
Staff have more reliable working hours	5
Staff have more time to enjoy leisure activities	6
More efficient use of supplies/deliveries	7
More business coming from other side of the river	8
Other (specify)	9

M Permission to re-contact

APPENDIX C

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 ma-	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 motor-	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 BOROUGHS 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 advertis-ing	-	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 BOROUGHS=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 BOROUGHS=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 BOROUGHS=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 BOROUGHS=217 / OVERALL = 249)	Havering 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 DE-CREASE (HAVERING=10 / 7 BOROUGHS 35 / OVERALL 44)	Havering 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)	Havering %	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 BOROUGHS =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 1	2	3	4	Very important 5	DK 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 1	2	3	4	Very significant problem 5	DK 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 BOROUGHS 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 BOROUGHS 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 BOROUGHS =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 BOROUGHS 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 BOROUGHS 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 BOROUGHS=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 BOROUGHS=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 BOROUGHS=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 BOROUGHS=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

I1. 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 BOROUGHS=600 / OVERALL = 686)	**Havering %**	**7 Bor-oughs %**	**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%

I2. 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 BOROUGHS=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%**

I3. 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 BOROUGHS =600 / OVER-ALL =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 BOROUGHS=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 BOROUGHS=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%*	*405*	*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 BOROUGHS=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 BOROUGHS=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%***
	Bexley (101)	*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%***
	Bexley (101)	*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%***
	Bexley (101)	*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%***
	Bexley (101)	*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%***
	Bexley(54)	*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%***
	Bexley (54)	*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%*

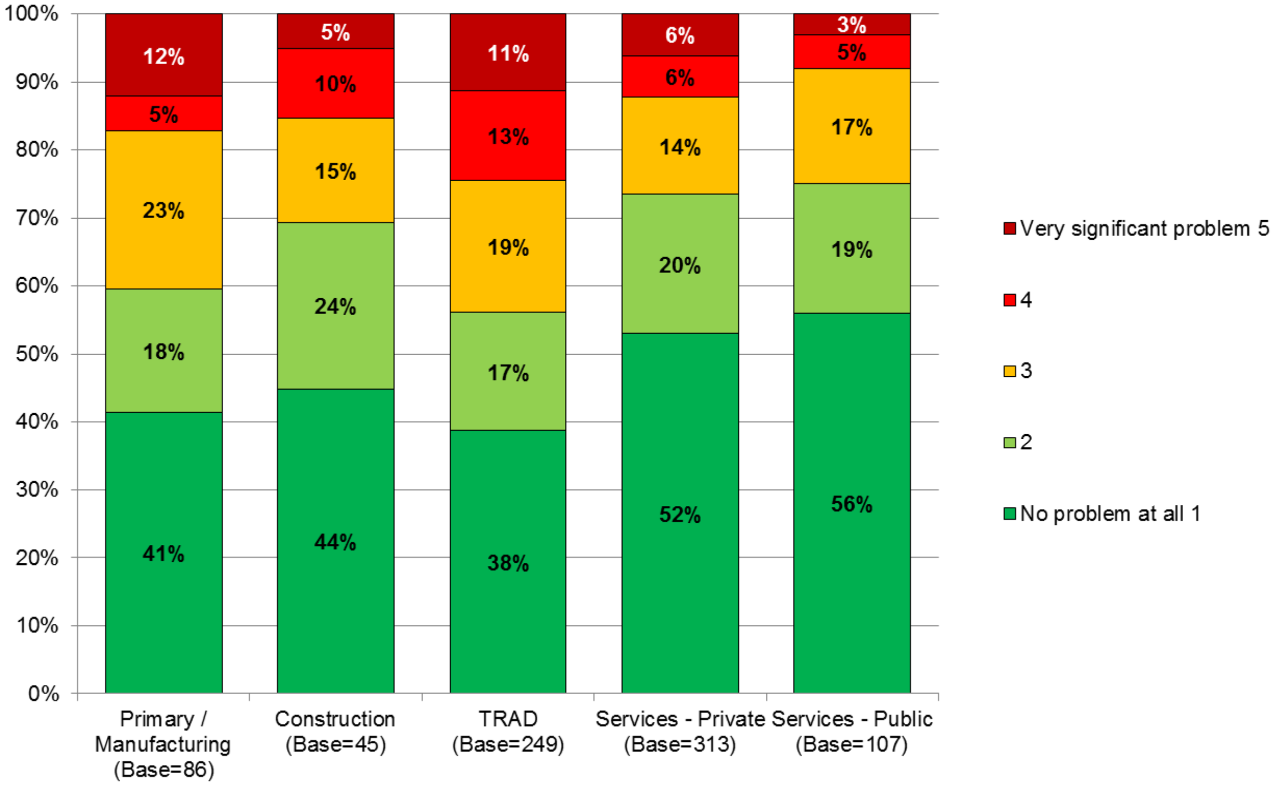
L4. From a business perspective, which of the following impacts do you think are likely to happen as a result of the East London River Crossing package? CODE ALL THAT APPLY

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%

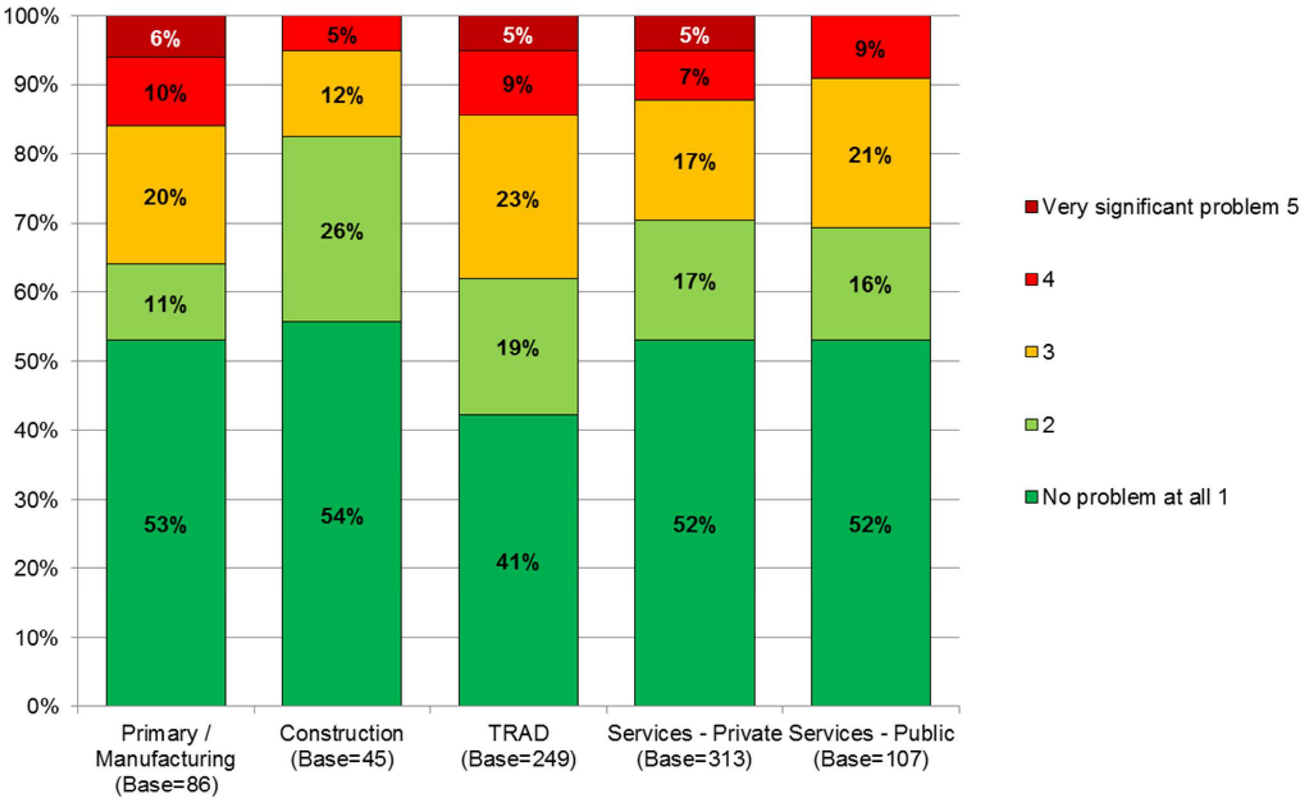
APPENDIX D
Further analysis

Further Analysis

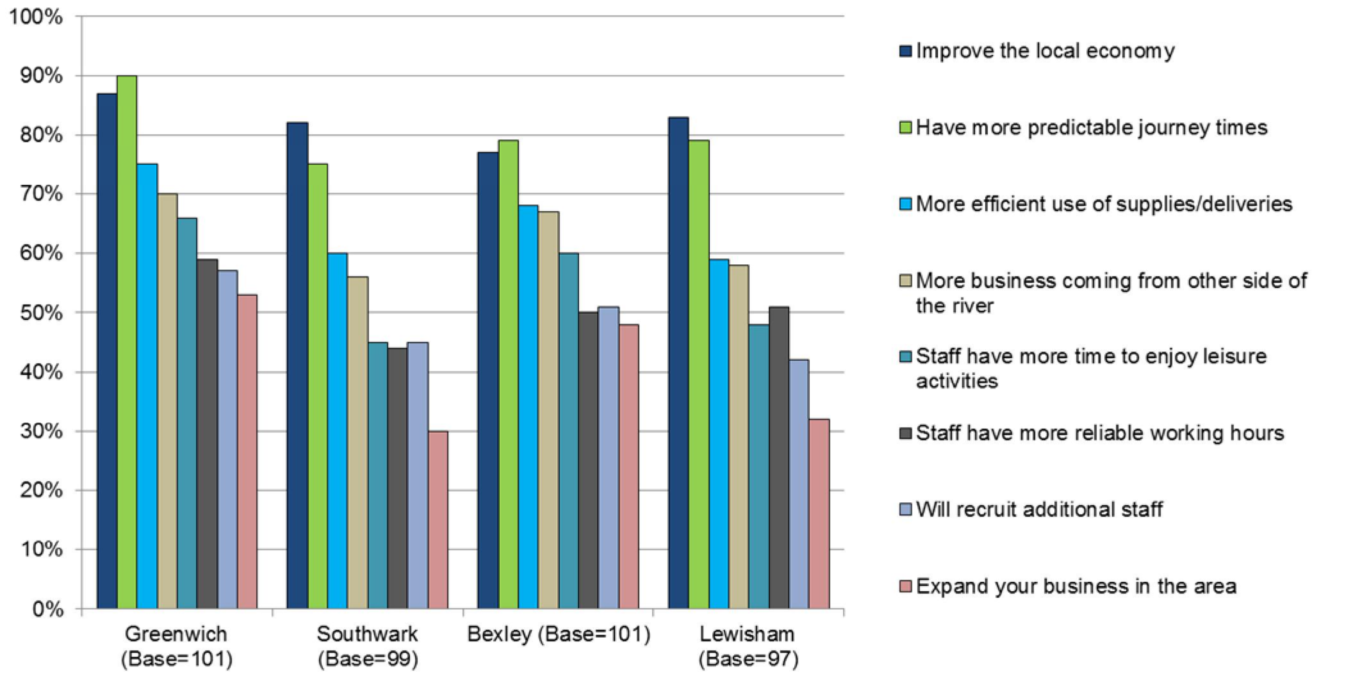
D6. Extent to which receiving or dispatching supplies / goods has caused a problem (by sector)



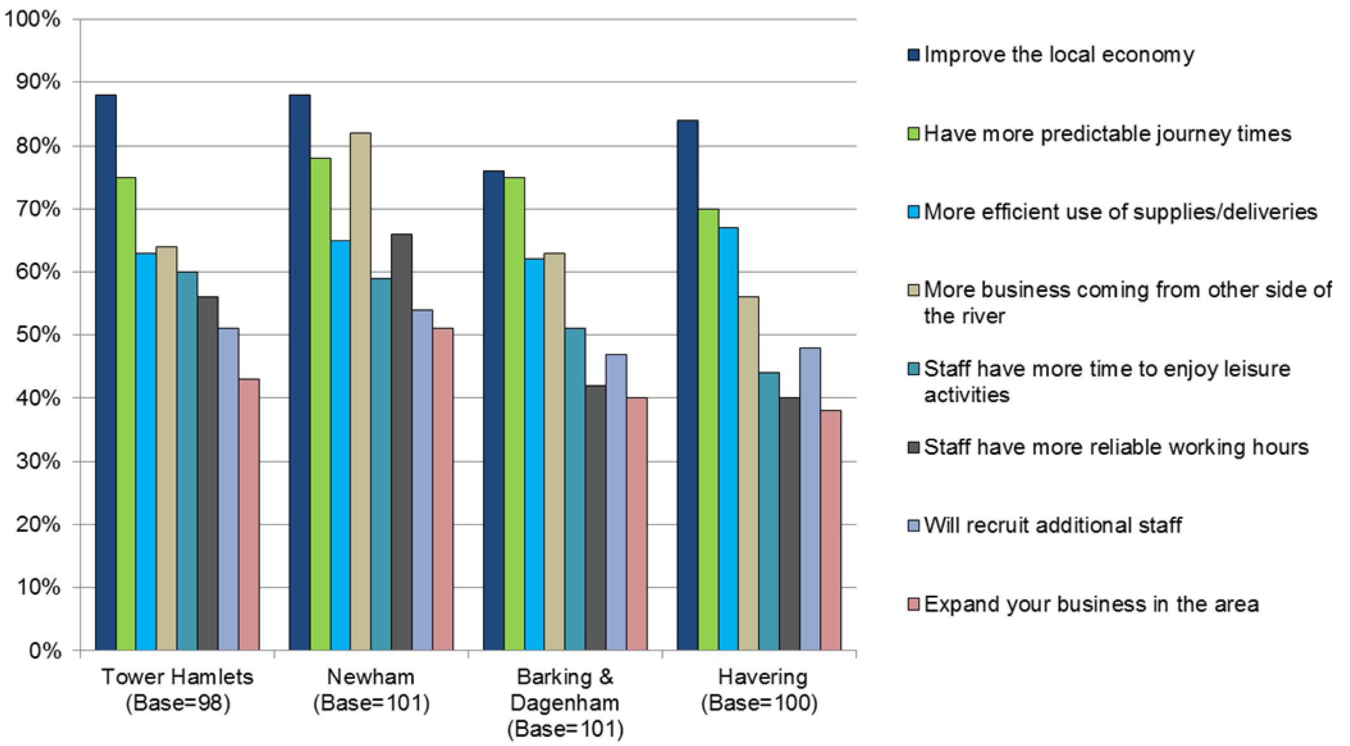
D6. Extent to which relevant and available labour has caused a problem (by sector)



L4. Expected impact from package – South of river



L4. Expected impact from package – North of river



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