

London Borough of Newham

Employment Land Review

Business Survey Results

March 2010



GVA Grimley Ltd

10 Stratton Street
London
W1J 8JR

0870 900 8990
www.gvagrimley.co.uk

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London Borough of Newham

Employment Land Review

Business Survey Results

March 2010

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Contact: **Michael Dall**

Tel: **020 7911 2127**

Email: **michael.dall@gvagrimsley.co.uk**

www.gvagrimsley.co.uk

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1. INTRODUCTION

BACKGROUND

- 1.1 GVA Grimley Ltd were appointed by the London Borough of Newham to assist in the preparation of an Employment Land Review (ELR), which will form part of the Council's evidence base for the Local Development Framework.
- 1.2 In order to identify the private sector needs in the future within Newham a business survey was undertaken. This was to identify the key employment land and labour issues for businesses in Newham both now and in the future. In particular its aims were to:
- Better understand the local labour market
 - Understand trends and changes in the local economy
 - Monitor employer's experience of operating in Newham
 - Gain an understanding of local employer's issues and needs
 - Identify employment opportunities, skills gaps and training needs
 - Inform planning and infrastructure requirements
- 1.3 It is intended that this survey will help contribute to realistic planning for employment land requirements throughout the LDF period. This document therefore accompanies the Employment Land Review (ELR) and provides a detailed reporting of the business survey results.

2. METHDODOLOGY

OVERVIEW

- 2.1 This survey was undertaken by an independent market research company Research & Marketing Ltd. This ensures that responses are independent and reflective of the current business climate.
- 2.2 The questionnaire was based on similar surveys used in Employment Land Reviews in a number of local authorities in England & Wales. The responses were aggregated by GVA Grimley and key messages summarised in this report.

THE SURVEY

- 2.3 An initial mail out to 1,300 businesses was made in September 2009 in order to make potential respondents aware that they may be requested to take part in this survey. These 1,300 businesses were then approached via telephone, of which 200 took part which is a response rate of around 15%.
- 2.4 A telephone survey rather than a postal survey was performed because it is viewed to ensure a higher response rate. The list of interviewees was provided by Research and Marketing Ltd and comprises of firms recorded as being in B-Class Use sectors. Due to a poor response rate from B-Class uses a selection of non B-Class companies a selection of non B-Class businesses were approached.
- 2.5 Readers should take care when considering percentage results from some of the sub groups within the main sample, as the base figures may sometimes be small. Due to rounding some graphs may not add up to 100%.
- 2.6 GVA Grimley are confident, on the basis of the sample, that the survey presents a good representation of current thinking by local companies. To some extent findings may be coloured by the 2008 / 2009 financial crisis but respondents were asked to take a longer term view of their activities and needs.
- 2.7 The survey method allows for analysis and output by type of company/organisation and geographic area. The results of the survey are set out as follows:
- **Section three** provides an overview of the survey's main findings.
 - **Section four** provides the key characteristics of the businesses interviewed.

- **Section five** presents views on LB Newham as a business location and the factors that are most important for local businesses.
- **Section six** sets out local business's expectations for market growth.
- **Section seven** offers an insight into local businesses future growth plans.
- **Section eight** presents the views
- **Section nine** sets out the key conclusions drawn from the survey data.

3. SUMMARY OF MAIN FINDINGS

ORGANISATIONAL DEMOGRAPHIC AND CLASSIFICATION

- 3.1 The largest numbers of responses were received from organisations classified within the groups “Manufacturing”, “Wholesale Distribution” and “Vehicle Repair.” The response was reflective of the actual labour market in Newham and of “B Class” businesses.
- 3.2 The greatest number of responses came from organisations located in the Forest Gate, Green Street, East Ham area and the Lower Lea Valley. The geographical stratification of the Survey was largely indicative of the actual business/organisation geography of Newham, however may slightly under represent the significant proportion of “B Class” occupiers located in Beckton.
- 3.3 Generally businesses within Newham have been established for a number of years. Around 34% of participants had been in Newham for more than ten years. A further 22% had been present for between ten and twenty years. Only 5% of respondents indicated they were present for less than 1 year.

BUSINESS DEMOGRAPHICS AND BUSINESS SATISFACTION

- 3.4 Businesses within the survey indicated that a large proportion of staff are not local Newham residents. Sixty eight percent stated that they have less than 50% of staff who are local to Newham. Twenty nine percent stated they employ more than 70% from within Newham whilst the Wholesale and Distribution sector had more than 81% of respondents stating less than 50% of the workforce were local.
- 3.5 Of the respondents to the survey, 72% stated that they were a single site business (solely located in Newham). Fifteen percent stated that they were a UK or international branch or subsidiary and 11% were a headquarters.
- 3.6 The most important factors in terms of doing business in Newham were security features, cheap rents and on-site parking facilities. Over 51% of business respondents stated that good security features were very important whilst cheap rents were also considered to be very important by 51% of respondents. On site car parking was very important for 47.5% of businesses surveyed.
- 3.7 The majority of businesses indicated that their workforce has remained the same size over the last three years contrary to the recent economic downturn. Nearly 60% of businesses

indicated their workforce size had stayed the same or increased. The Retail Trade seems to of been least affected by the economic downturn with 70% of businesses in this sector reporting growth. The survey showed that the greatest number of responses indicating a decline in workforce size was within the Manufacturing sector.

- 3.8 The business survey indicated that the majority of respondents (54%) have had no difficulties when recruiting staff. The survey highlighted that the Skilled Trade occupations have been the most difficult for businesses to recruit (32% noted difficulties for this type of employee). A substantial number of businesses (18%) have not recruited at all in the last 2 years.

MARKET GROWTH EXPECTATIONS

- 3.9 Sentiment amongst businesses regarding the future growth of their markets was generally positive. Despite the recent recession over 57% of respondents expected the market to grow, while around 24% expected the market to stay about the same. Out of the remaining 19%, 13.5% believed that their principal market would contract.

FUTURE PLANS OF NEWHAM ORGANISATIONS

- 3.10 The vast majority of businesses indicated they had no desire to relocate their business and the majority of those that did were likely to relocate within the immediate vicinity. Fifty seven percent had no plans to move operations away from their current site whilst 6% of businesses already had plans to move away from their current site, with 12% viewing a move as very likely.
- 3.11 The survey demonstrates that businesses have a strong attraction to the area where they are currently located with the majority that plan to move wishing to stay in the same area. Those considering relocation planned to do so within Newham (48%). A further 27% also planned to stay within the South East of England with 9% planning to move anywhere within the UK. The greatest reason that businesses gave for moving away from current premises was to move to a bigger site (29% of the cases). This was followed by a need to move to a nicer area (19%).
- 3.12 If businesses were to consider relocating the most popular premises would be for smaller sized units. More than 50% of respondents that considered moving wanted small premises of 280 sq m or less, with a small number (4.5 %) of those considering moving requiring larger premises of over 1,850 sq m.

COMMUNICATION WITH THE COUNCIL

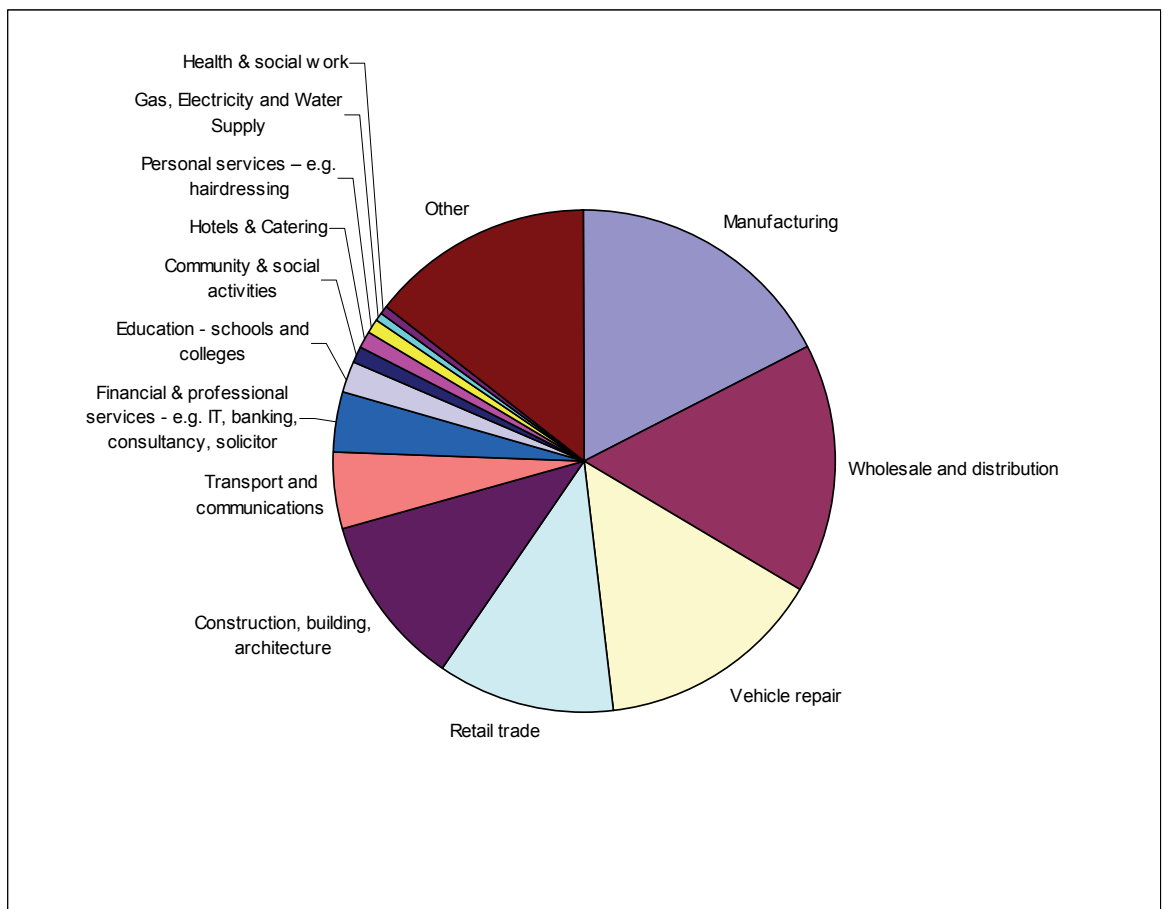
- 3.13 The majority of businesses felt that there are not enough opportunities to engage with the Council . Fifty five percent of businesses felt that current opportunities to communicate with the Council were limited. The most popular way of communicating with businesses regarding future policy making decisions was via one to one meetings, 44.5% of respondents shared this view.

4. THE SAMPLE

DEMOGRAPHIC CLASSIFICATIONS

4.1 Respondents were asked to categorise the area of work that most reflected their line of business. The highest representation of respondents came from the Manufacturing sector, closely followed by Wholesale and Distribution. This is shown in Figure 1.

Figure 1 – Which of the following best describes your sector?



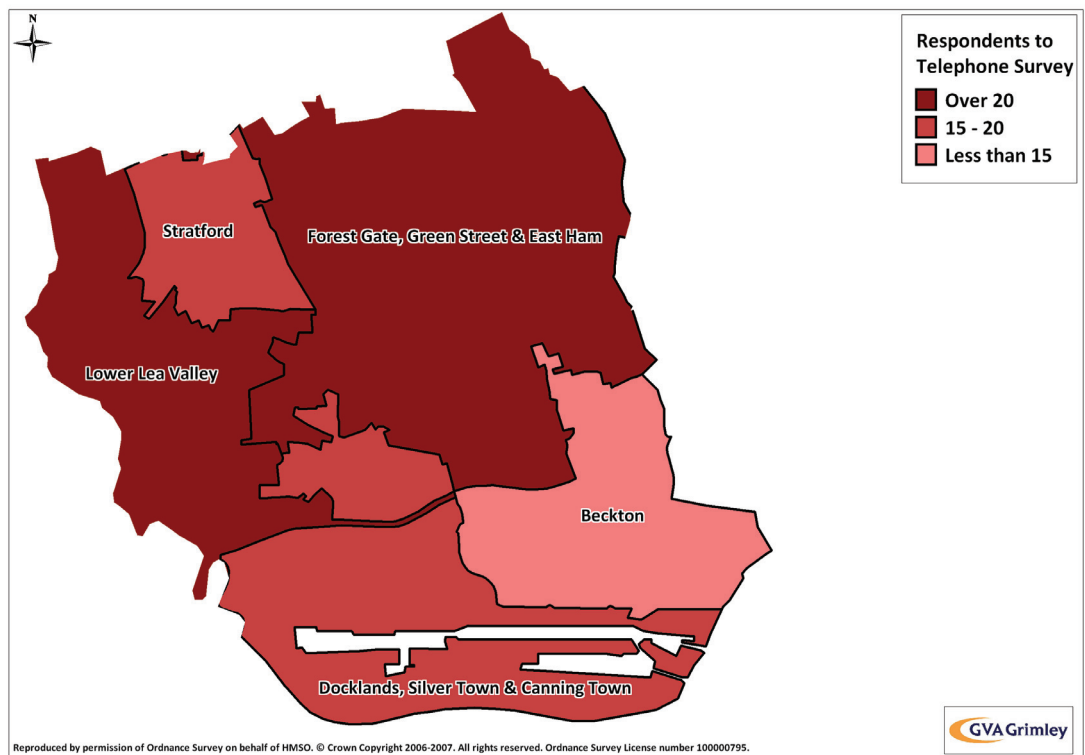
Source: London Borough of Newham Business Survey

4.2 This gives a strong representation of those firms principally within the “B Class” sectors and therefore give a representative sample of the issue facing firms of this kind.

AREA

- 4.3 The survey was stratified in order to capture a representative sample of Newham's employers and businesses. Figure 2 shows the geographical location of businesses that responded to the survey. There is a particularly high response volume from businesses based in the Lower Lea Valley and Forest Gate, Green Street and East Ham areas. It is most likely that this relates to the nature of the business in Newham with a higher number of small businesses in these locations. There is a particularly low response from businesses in Beckton which is seen as the primary industrial location in Newham.

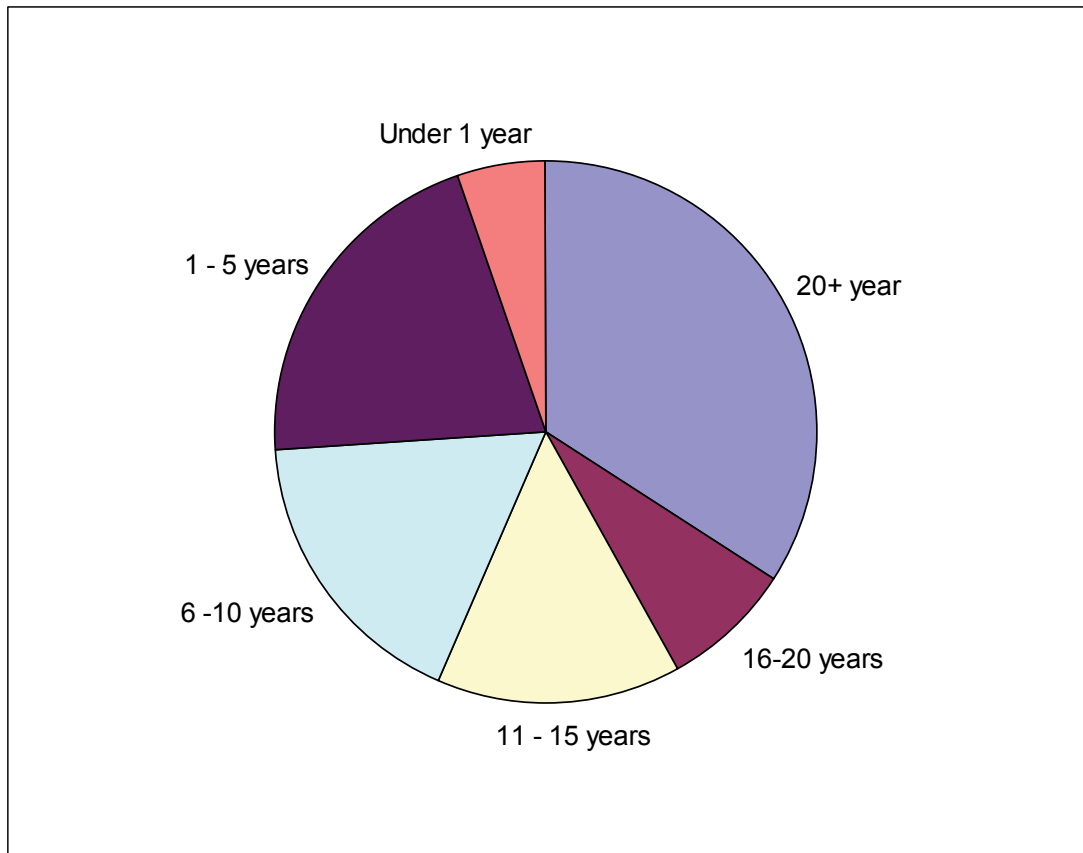
Figure 2 – Respondents by Geography



Source: *Newham Business Survey*

LENGTH OF LOCAL BUSINESS ACTIVITY

- 4.4 As shown in Figure 3, 64 (34%) participants have been in Newham for more than 20 years. A further 15 (8%) respondents had been present for between sixteen and twenty years and 27 (14%) had been present for between eleven and fifteen years. Only 10 (5%) of respondents indicated they were present for less than 1 year. This indicates that those surveyed were generally long standing businesses and reflects the established business base that is prevalent within the Borough.

Figure 3 – How many years has your organisation been trading?

Source: Newham Business Survey

PROPORTION OF LOCAL STAFF

- 4.5 Table 1 below indicates that 128 (68%) of the respondent businesses have less than 50% of staff that are local residents within Newham. Only 58 (29%) of respondents employ more than 70% of staff from within Newham indicating the reliance of Newham's businesses on employees from outside of the Borough.
- 4.6 The largest proportion of local residents seem to be within the Retail Trade sector with nearly 60% of businesses indicating more than half of their staff were Newham residents. The Wholesale and Distribution sector returned more than 25 respondents (81.24 %) employing a proportion of less than 50% Newham residents.

Table 1 – Approximately what proportion of your staff are Newham Residents?

	Total	Community and social activities	Construction, building, architecture	Education - schools and colleges	Financial & professional services	Gas, Electricity and Water Supply	Health & social work	Hotels & Catering	Manufacturing	Personal services - e.g. hairdressing	Retail trade	Transport and communications	Vehicle repair	Wholesale and distribution	Other
Less than 20%	85 (42.5%)	1 (50%)	12 (54.55%)	1 (25%)	2 (25%)	0 (0%)	0 (0%)	1 (50%)	14 (40%)	2 (100%)	6 (26.09%)	4 (40%)	10 (34.48%)	18 (56.25%)	14 (48.28%)
Less than 50%	43 (21.5%)	0 (0%)	5 (22.73%)	1 (25%)	3 (37.5%)	0 (0%)	0 (0%)	0 (0%)	13 (37.14%)	0 (0%)	3 (13.04%)	1 (10%)	5 (17.24%)	8 (25%)	4 (13.79%)
50-70%	14 (7%)	0 (0%)	1 (4.55%)	1 (25%)	1 (12.5%)	0 (0%)	1 (100%)	0 (0%)	4 (11.43%)	0 (0%)	2 (8.7%)	0 (0%)	3 (17.2%)	1 (3.13%)	0 (0%)
70-90%	16 (8%)	1 (50%)	2 (9.09%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (2.86%)	0 (0%)	0 (0%)	1 (10%)	2 (6.9%)	2 (6.25%)	7 (24.14%)
More than 90%	42 (21%)	0 (0%)	2 (9.09%)	1 (25%)	2 (25%)	1 (100%)	0 (0%)	1 (50%)	3 (8.57%)	0 (0%)	12 (52.17%)	4 (40%)	9 (31.03%)	3 (9.38%)	4 (13.79%)
Total Respondents	200	2	22	4	8	1	1	2	35	2	23	10	29	32	29

Source: Newham Business Survey

CHANGING WORKFORCE

- 4.7 Table 2 below, indicates that the majority (nearly 60%) of business workforces have stayed the same or grown over the last 3 years. However 80 respondents (40%) confirmed their workforce had declined in size, likely to be a result of the recent economic downturn. Although there isn't one sector that has shown an unusually large proportion of respondents reporting growth, Retail traders seems to of performed relatively well with 16 respondents (nearly 70%) seeing no change or growth in workforce over the last 3 years.
- 4.8 The Manufacturing sector seems to of been hardest hit by the downturn where 21 (60%) businesses reported a decline in workforce size. Other sectors which have seen cuts in their workforce include the Vehicle Repair (44.8%) business with only 1 respondent (1%) indicating an increased workforce.

Table 2 – How has the size of your workforce changed in the last three years?

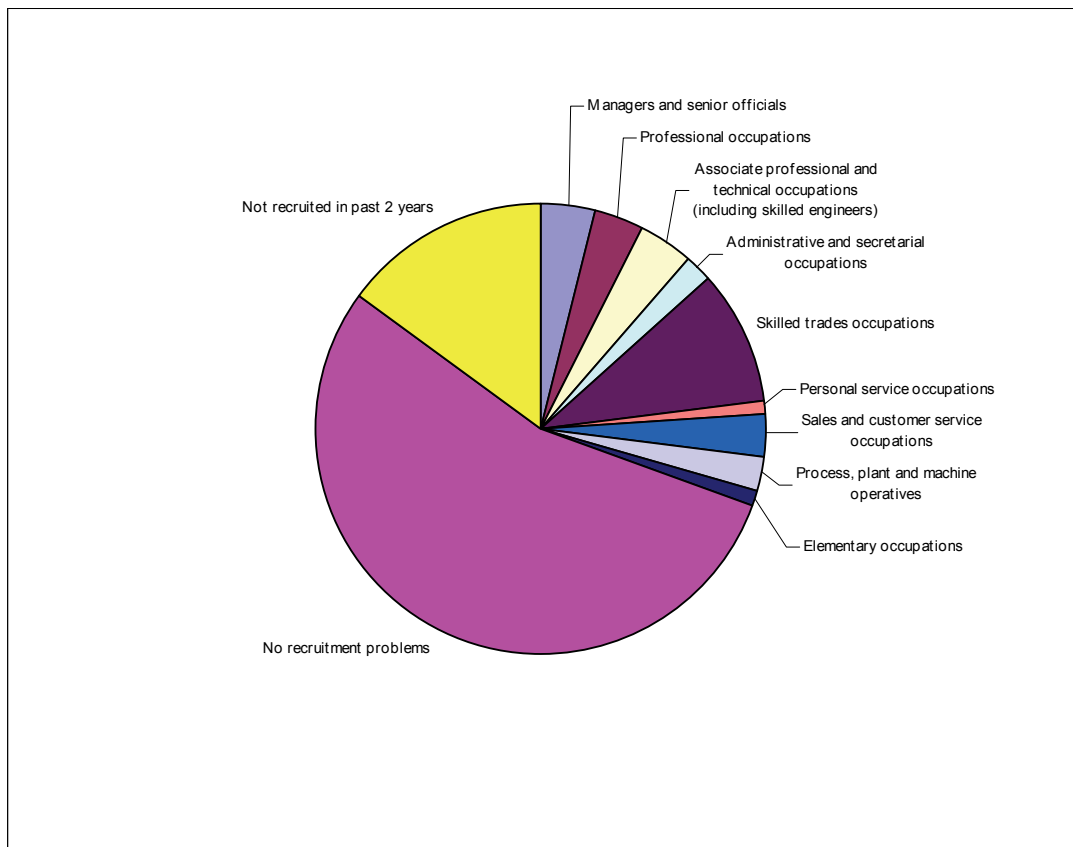
	Total	Financial & professional services - e.g. IT, banking, consultancy, solicitor										Total				
		Community and social activities	Construction, building, architecture	Education - schools and colleges	Gas, Electricity and Water Supply	Health & social work	Hotels & Catering	Manufacturing	Personal services - e.g. hairdressing	Retail trade	Transport and communications		Vehicle repair	Wholesale and distribution	Other	
Grown	30 (15%)	1 (50%)	5 (22.7%)	1 (25%)	3 (37.5%)	1 (100%)	1 (100%)	1 (100%)	0 (0%)	3 (8.6%)	0 (0%)	2 (8.7%)	0 (0%)	1 (3.4%)	5 (15.6%)	7 (24%)
Declined	80 (40%)	1 (50%)	9 (40.9%)	1 (25%)	1 (12.5%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	21 (60%)	1 (50%)	7 (30.4%)	4 (40%)	13 (44.8%)	12 (37.5%)	10 (34%)
Stayed the same	89 (44.5%)	0 (0%)	8 (36.4%)	2 (50%)	4 (50%)	0 (0%)	0 (0%)	2 (100%)	0 (0%)	11 (31.4%)	0 (0%)	14 (60.9%)	6 (60%)	15 (51.7%)	15 (46.9%)	12 (41%)
Refused	1 (0.5%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (50%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Total Respondents	200	2	22	4	8	1	1	2	35	2	23	10	29	32	29	

Source: Newham Business Survey

RECRUITMENT

4.9 As represented in Figure 1, the majority of respondents (54%) have had no difficulties when recruiting. The business survey indicated that the Skilled Trade occupations have been the hardest for businesses to recruit, with 23 respondents (32%) recording difficulties in this sector. A substantial number of businesses (18%) have not recruited at all in the last 2 years, a sign of the affect economic conditions have had on businesses within LB Newham over this period.

Figure 4 – Have you had any recruitment difficulties in any occupational areas? (e.g. administration, sales, customer service, etc)



Source: Newham Business Survey

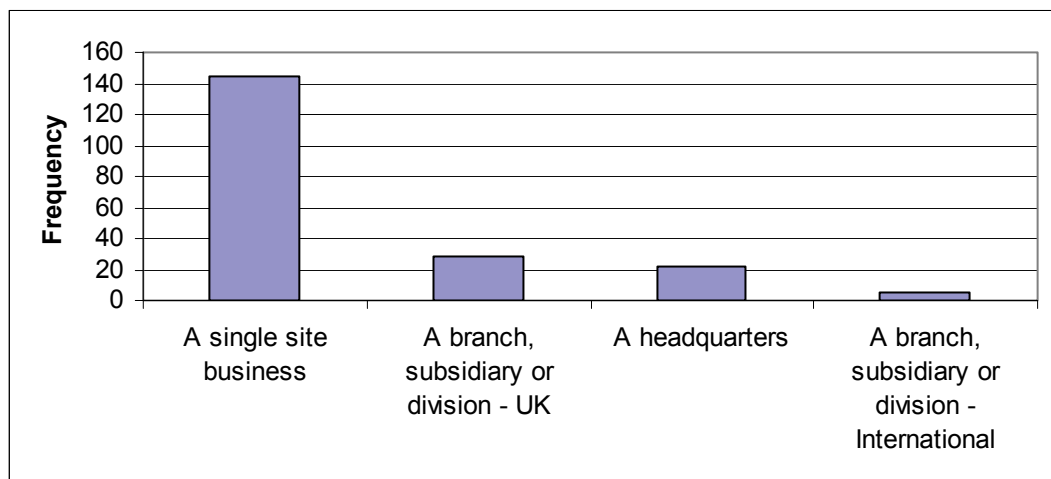
5. FACTS ABOUT BUSINESSES

BUSINESS SATISFACTION

BUSINESS STATUS

5.1 Of the respondents to the survey, 144 (72%) stated that they were a single site business (solely located in Newham). 29 (15%) stated that they were a UK or international branch or subsidiary and 22 (11%) were a headquarters as shown in Figure 5 below. This demonstrates the predominance among the sample of single site businesses across the District.

Figure 5 – Type of site



Source: Newham Business Survey

IMPORTANT FACTORS FOR BUSINESSES

5.2 Table 3 below shows the important factors for businesses by major sector regarding Newham as a business location. 103 (51.5%) respondents stated that good security features were very important to doing business in Newham. This factor is particularly important to those in the vehicle repair sector. Cheap rents were also considered to be very important by around 102 (51%) respondents, particularly those in the manufacturing sector, perhaps reflecting the need for a low cost base in this sector in order to remain competitive.

5.3 On site parking is considered very important by firms in Newham by 95 (47.5%) businesses surveyed in Newham. This was particularly important to those firms in the Manufacturing, Vehicle Repair and Retail Trade sectors. In terms of devising planning policies for the

future it may therefore be advisable to consider policies that allow for increased parking provision at Manufacturing, Vehicle Repair and Retail Trade locations.

Table 3 – To what extent are the following factors very important to operating in Newham?

	Total	Community and social activities	Construction, building, architecture	Education - schools and colleges	Financial & professional services	Gas, Electricity and Water Supply	Health & social work	Hotels & Catering	Manufacturing	Personal services - e.g. hairdressing	Retail trade	Transport and communications	Vehicle repair	Wholesale and distribution	Other
Good Transport Links	71 (35.5%)	2 (100%)	8 (36.4%)	2 (50%)	5 (62.5%)	1 (100%)	1 (100%)	1 (50%)	9 (25.7%)	0 (0%)	12 (52.2%)	4 (40%)	12 (41.4%)	7 (21.9%)	7 (24.7%)
Fast Access to the motorway	40 (20%)	1 (50%)	6 (27.3%)	0 (0%)	1 (12.5%)	1 (100%)	0 (0%)	0 (0%)	5 (14.3%)	0 (0%)	1 (4.3%)	2 (20%)	8 (27.6%)	12 (37.5%)	3 (10%)
Access to an airport	8 (4%)	0 (0%)	2 (9.1%)	0 (0%)	1 (12.5%)	0 (0%)	0 (0%)	0 (0%)	1 (2.9%)	0 (0%)	1 (4.3%)	2 (20%)	1 (3.4%)	0 (0%)	0 (0%)
Near to own residence	30 (15%)	0 (0%)	4 (18.2%)	1 (25%)	2 (25%)	1 (100%)	0 (0%)	0 (0%)	3 (8.6%)	1 (50%)	6 (26.10%)	0 (0%)	6 (20.7%)	2 (6.3%)	4 (14%)
Located close to customers / suppliers	78 (39%)	2 (100%)	7 (31.8%)	2 (50%)	5 (62.5%)	1 (100%)	1 (100%)	1 (50%)	10 (28.6%)	1 (50%)	12 (52.2%)	3 (30%)	12 (41.4%)	11 (34.4%)	10 (34%)
Located in a high quality area	32 (16%)	0 (0%)	3 (13.6%)	2 (50%)	2 (25%)	1 (100%)	0 (0%)	1 (50%)	2 (5.7%)	0 (0%)	6 (26.1%)	0 (0%)	9 (3131%)	1 (3.1%)	5 (17%)
Cheap Rents	102 (51%)	2 (100%)	9 (40.9%)	2 (50%)	4 (50%)	1 (100%)	0 (0%)	1 (50%)	22 (62.9%)	2 (100%)	15 (65.2%)	3 (30%)	14 (48.3%)	15 (46.9%)	12 (41%)
Located in a high quality building	31 (15.5%)	0 (0%)	3 (13.6%)	2 (50%)	2 (25%)	1 (100%)	1 (100%)	0 (0%)	4 (11.4%)	1 (50%)	2 (8.7%)	0 (0%)	5 (17.2%)	9 (28.1%)	1 (3%)
Management / maintenance of premises	63 (31.5%)	1 (50%)	4 (18.2%)	2 (50%)	5 (62.5%)	1 (100%)	1 (100%)	0 (0%)	11 (31.4%)	1 (50%)	10 (43.5%)	2 (20%)	15 (51.7%)	6 (18.8%)	4 (14%)
Good local site access	76 (38%)	2 (100%)	8 (36.4%)	0 (0%)	4 (50%)	1 (100%)	1 (100%)	1 (50%)	14 (40%)	1 (50%)	9 (39.1%)	3 (30%)	9 (31%)	12 (37.5%)	11 (38%)
HGV Access	67 (33.5%)	2 (100%)	6 (27.3%)	1 (25%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	18 (51.4%)	0 (0%)	9 (39.1%)	0 (0%)	2 (6.9%)	19 (59.4%)	10 (34%)

On site parking availability	95 (47.5%)	1 (50%)	7 (31.8%)	2 (50%)	5 (62.5%)	1 (100%)	1 (100%)	1 (50%)	17 (48.6%)	2 (100%)	15 (65.2%)	3 (30%)	16 (55.2%)	13 (40.6%)	11 (38%)
Having Storage Space	64 (32%)	2 (100%)	10 (45.5%)	1 (25%)	0 (0%)	1 (100%)	1 (100%)	0 (0%)	6 (17.1%)	1 (50%)	7 (30.4%)	1 (10%)	12 (41.4%)	14 (43.8%)	8 (28%)
Ability of premises to accommodate growth	33 (16.5%)	1 (50%)	5 (22.7%)	2 (50%)	1 (12.5%)	1 (100%)	1 (100%)	0 (0%)	2 (5.7%)	0 (0%)	6 (26.1%)	0 (0%)	5 (17.2%)	7 (21.9%)	2 (7%)
Good security features	103 (51.5%)	2 (100%)	13 (59.1%)	2 (50%)	3 (37.5%)	1 (100%)	1 (100%)	1 (50%)	13 (37.1%)	1 (50%)	12 (52.2%)	2 (20%)	21 (72.4%)	16 (50%)	15 (52%)
Freehold	47 (23.5%)	0 (0%)	7 (31.8%)	0 (0%)	3 (37.5%)	1 (100%)	0 (0%)	0 (0%)	3 (8.6%)	0 (0%)	9 (39.1%)	1 (10%)	12 (41.4%)	6 (18.8%)	5 (17%)

Source: *Newham Business Survey*

5.4 The factors considered very important are also analysed according to which area each business is located in and are shown in Table 4 below. 49 (57.65%) respondents based in the Lower Lea Valley cite good security features and 42 (49.41%) believe cheap rents are very important to locating in Newham. Similarly, 41 (56.94%) and 36 (50%) of the respondents in Forest Gate, Green Street and East Ham view cheap rents and good security, respectively, as very important to their operations. Respondents from Canning Town, Silvertown and Docklands view good security as the most important factor to their operations however also see cheap rents, HGV access, good local site access and storage space as very important with 10 (47.62%) references for each.

Table 4 – To what extent are the following factors very important to operating in Newham

	Total	Beckton	Lower Lea Valley	Stratford	Forest Gate, East Ham	Canning Town, Silvertown and Docklands
Good Transport links	71 (35.5%)	0 (0%)	34 (40%)	7 (46.67%)	25 (34.72%)	5 (23.81%)
Fast Access to the Motorway	40 (20%)	2 (28.57%)	24 (28.24%)	1 (6.67%)	9 (12.4%)	4 (19.05%)
Access to an airport	8 (4%)	0 (0%)	3 (3.53%)	0 (0%)	5 (6.94%)	0 (0%)
Near to own residence	30 (15%)	0 (0%)	9 (10.59%)	3 (20%)	16 (22.22%)	2 (9.52%)
Located close to customers / suppliers	78 (39%)	3 (42.86%)	32 (37.65%)	7 (46.67%)	24 (33.33%)	12 (57.14%)
Located in a high quality area	32 (16%)	0 (0%)	12 (14.12%)	1 (6.67%)	16 (22.22%)	3 (14.29%)
Cheap Rents	102 (51%)	1 (14.29%)	42 (49.41%)	8 (53.33%)	41 (56.94%)	10 (47.62%)
Located in a high quality building	31 (15.5%)	3 (42.86%)	12 (14.12%)	2 (13.33%)	11 (15.28%)	3 (14.29%)
Management / maintenance of premises	63 (31.5%)	0 (0%)	30 (35.29%)	4 (26.67%)	25 (34.72%)	4 (19.05%)
Good local site access	76 (38%)	1 (14.29%)	37 (43.53%)	6 (40%)	22 (30.56%)	10 (47.62%)
HGV Access	67 (33.5%)	4 (57.14%)	37 (45.53%)	3 (20%)	13 (18.06%)	10 (47.62%)
On site parking availability	95 (47.5%)	1 (14.29%)	45 (52.29%)	6 (40%)	35 (48.61%)	8 (38.10%)
Having Storage Space	64 (32%)	1 (14.29%)	33 (38.82%)	2 (13.33%)	18 (25%)	10 (47.62%)
Ability of premises to accommodate growth	33 (16.5%)	0 (0%)	16 (18.82%)	1 (6.67%)	13 (18.06%)	3 (14.29%)
Good security features	103 (51.5%)	2 (28.57%)	49 (57.65%)	5 (33.33%)	36 (50%)	11 (52.38%)
Freehold ownership	47 (23.5%)	0 (0%)	12 (14.12%)	1 (6.67%)	30 (41.67%)	4 (19.05%)

Source: Newham Business Survey

6. MARKET GROWTH EXPECTATIONS

MARKET GROWTH EXPECTATIONS

- 6.1 Business respondents were asked whether they anticipated their market to grow or contract during the next 5 years. Table 5 below indicates that 114 (57%) respondents expected the market to grow, while around 48 (24%) expected the market to stay about the same. Out of the remaining 38 (19%), 13.5% believed that their principal market would contract.
- 6.2 Respondents in the Construction, Building & Architecture sector in particular believed that their principal market would grow with around 64% responding positively to growth expectations. In contrast, around 47% of respondents in the Wholesale and Distribution sector believe the market would stay the same or contract during the next 5 years.
- 6.3 Table 6 below indicates that those respondents based in Beckton and Canning Town, Silvertown and Docklands were the most positive about future growth with around 86% and 62% believing they would grow in the future. This is an indication of the further growth that is expected from the industrial sector within the District.

Table 5 – Market Growth by Sector

	Total	Community and social activities	Construction, building, architecture	Education - schools and colleges	Financial & professional services - e.g. IT, banking, consultancy, solicitor	Gas, Electricity and Water Supply	Health & social work	Hotels & Catering	Manufacturing	Personal services - e.g. hairdressing	Retail trade	Transport and communications	Vehicle repair	Wholesale and distribution	Other
Grow very strongly	21 (10.5%)	0 (0%)	5 (22.7%)	2 (50%)	2 (25%)	0 (0%)	1 (100%)	0 (0%)	3 (8.6%)	0 (0%)	1 (4.3%)	0 (0%)	1 (3.4%)	3 (9.4%)	3 (10.3%)
Grow gradually	93 (46.5%)	2 (100%)	9 (40.9%)	2 (50%)	4 (50%)	1 (100%)	0 (0%)	2 (100%)	16 (45.7%)	2 (100%)	11 (47.8%)	5 (50%)	13 (44.8%)	13 (44.8%)	13 (44.8%)
Stay about the same	48 (24%)	0 (0%)	6 (27.3%)	0 (0%)	2 (25%)	0 (0%)	0 (0%)	0 (0%)	8 (22.9%)	0 (0%)	8 (34.8%)	2 (20%)	8 (27.6%)	7 (21.9%)	7 (24.1%)
Contract slowly	19 (9.5%)	0 (0%)	1 (4.5%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	4 (11.4%)	0 (0%)	2 (8.7%)	2 (20%)	1 (3.4%)	5 (15.6%)	4 (13.8%)
Contract significantly	8 (4%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	2 (5.7%)	0 (0%)	1 (4.3%)	0 (0%)	2 (6.9%)	3 (9.4%)	0 (0%)
Don't know	9 (4.5%)	0 (0%)	1 (4.5%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	2 (5.7%)	0 (0%)	0 (0%)	1 (10%)	2 (6.9%)	1 (3.1%)	2 (6.9%)
Refused	2 (1%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	2 (6.9%)	0 (0%)	0 (0%)
Total Respondents	200	2	22	4	8	1	1	2	35	2	23	10	29	32	29

Source: Newham Business Survey

Table 6 – Market growth expectations by area

	Total	Beckton	Lower Lea Valley	Stratford	Forest Gate, East Ham	Canning Town, Silvertown and Docklands
Grow very strongly	21 (10.5%)	1 (14.3%)	14 (16.5%)	2 (13.3%)	4 (5.6%)	0 (0%)
Grow gradually	93 (46.5%)	5 (71.4%)	36 (42.4%)	7 (46.7%)	32 (44.4%)	13 (61.9%)
Stay about the same	48 (24.0%)	1 (14.3%)	18 (21.2%)	3 (20%)	22 (30.6%)	4 (19%)
Contract slowly	19 (9.5%)	0 (0%)	8 (9.4%)	2 (13.3%)	8 (11.1%)	1 (4.8%)
Contract significantly	8 (4%)	0 (0%)	4 (4.7%)	0 (0%)	2 (2.8%)	2 (9.5%)
Don't know	9 (4.5%)	0 (0%)	5 (5.9%)	1 (6.7%)	2 (2.8%)	1 (4.8%)
Refused	2 (1%)	0 (0%)	0 (0%)	0 (0%)	2 (2.8%)	0 (0%)
Total	200	7	85	15	72	21

Source: *Newham Business Survey*

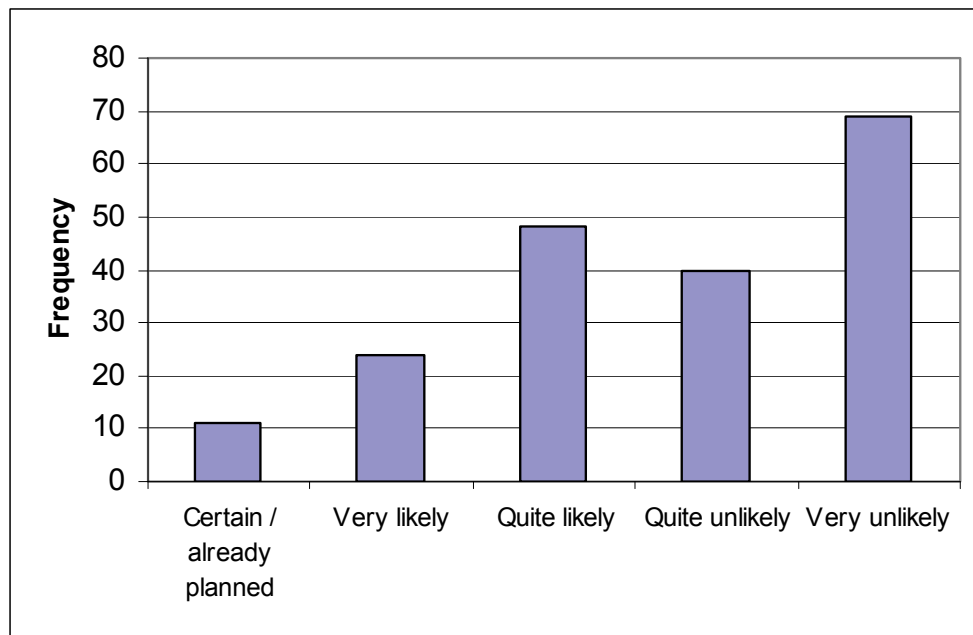
7. FUTURE PLANS

FUTURE PLANS

RELOCATION INTENTIONS

7.1 Businesses were asked what the likelihood of relocating some or all of their operations was in the next five years. Figure 6 indicates that the majority of businesses (109 respondents or 57% of cases) had no plans to move operations in the next five years. 11 (6%) businesses already had plans to move, with a further 24 (12%) viewing a move as very likely.

Figure 6 – What is the likelihood of your business relocating elsewhere in the next 5 years?



Source: Newham Business Survey

REASONS FOR MOVING

7.2 Table 7 indicates that the most common reason that businesses gave for moving away from current premises was to move to a bigger site (29 respondents or 29% of the cases). This was followed by a need to move to a nicer area (19 respondents or 19% of the cases).

Table 7 – Reasons for relocation

Reason for Moving	Number	Percent
Require larger premises to facilitate expansion	29	29%
Relocate to a nicer area	19	19%
Require more suitable premises for operational purposes	13	13%
Want to move into freehold premises	10	10%
Price of premises too expensive	9	9%
Need to move nearer to customers / suppliers	7	7%
Want to consolidate to a smaller site	5	5%
To realise the increased value of your site	4	4%
Require better transport links	2	2%
Having difficulty in recruiting / retain staff	1	1%
Total	99	

Source: Newham Business Survey

LOCATION OF WHERE RESPONDENT PLANS TO MOVE TO

- 7.3 Table 8 shows that the majority of those respondents considering relocation planned to do so within the immediate vicinity (37 respondents or 48% of cases). A further 21 (27%) respondents also planned to stay within the south east of England with 7 respondents (9%) considering moving to anywhere within the UK.

Table 8 – Where are you considering moving to?

Reason	Number	Percent
Within the immediate vicinity	37	0
Anywhere within the South East	21	0
Anywhere within South London	7	0
Anywhere within the UK	7	0
Elsewhere in Newham	3	0
Don't know	2	0
Refused	0	0
Total	77	

Source: Newham Business Survey

FLOORSPACE REQUIREMENTS

- 7.4 Around 101 (50.5%) of respondents that were considering moving wanted premises of 280 square metres or less. Meanwhile, around 9 (4.5 %) of those considering moving required premises of over 1860 square metres as shown in **Error! Reference source not found.** below.

7.5 Table 9 indicates there is a market available for smaller units as opposed to larger units within the Borough.

Table 9 – Floorspace required in new premises

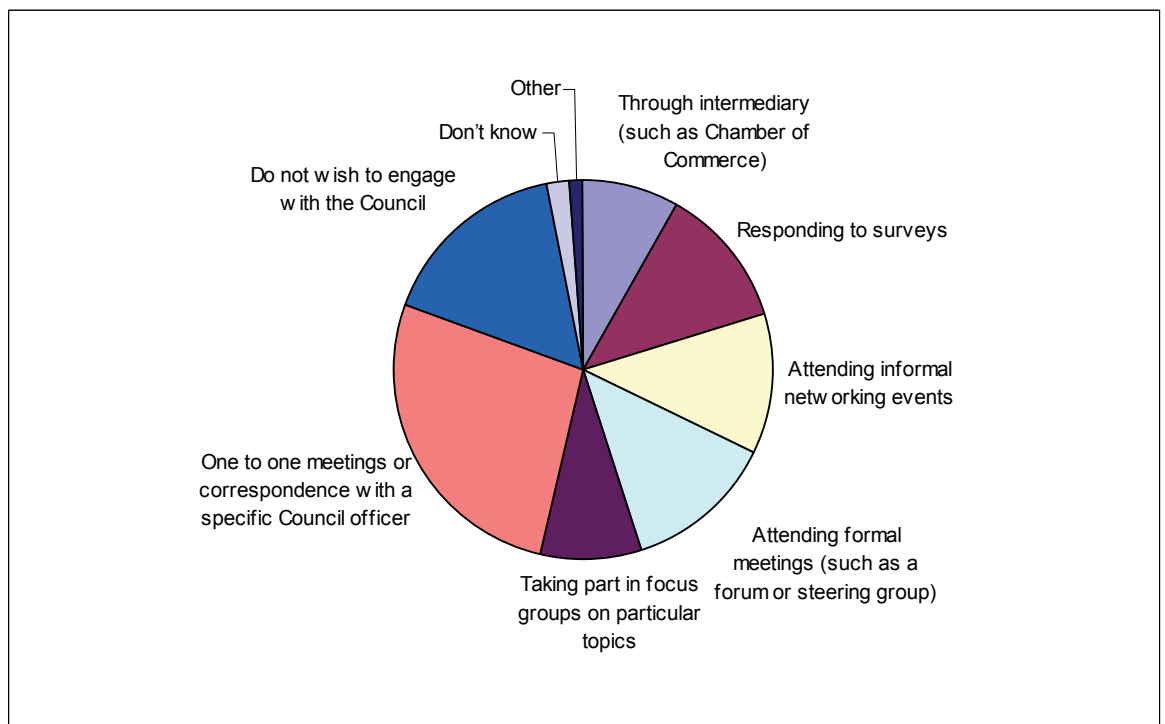
Floorspace size	Frequency	%
0 - 90 SQ.M	57	28.5%
91 - 280 SQ.M	44	22.0%
281 - 460 SQ.M	19	9.5%
461 - 930 SQ.M	18	9.0%
931 - 1860 SQ.M	9	4.5%
OVER 1861SQ.M	9	4.5%

Source: Newham Business Survey

8. CONTACT WITH COUNCIL

- 8.1 With regards to the contact businesses have with the Council, 64 (55%) respondents believe they have not had adequate opportunity to engage with the Council.
- 8.2 Figure 7 below indicates that the most popular form of communication with the Council regarding policy making is by one to one meetings with an officer. 89 (44.5%) respondents shared this view with a further 42 (21%) wanted to attend more formal meetings (such as a forum or steering group). 55 (27.5%) of respondents did not wish to engage with the Council regarding their policy making process.

Figure 7 – How would you like to engage with the Council with regards to policy making?



Source: Newham Business Survey

9. CONCLUSIONS

- 9.1 Overall, the survey has its strongest representation from the Manufacturing and Wholesale & Distribution sectors which is reflective of the current sectoral make up of the District.
- 9.2 The majority of respondents were located in the Forest Gate, Green Street & East Ham and the Lower Lea Valley area of the Borough, which is largely reflective of the number of smaller businesses in these areas.
- 9.3 The length of presence of the respondents suggests that the business profile tends to lean towards established employers i.e. they have been present for more than ten years.
- 9.4 The survey indicated that the majority of business workforces in Newham have stayed the same size or grown over the last 3 years. Although Retail Trade showed the largest amount of respondents reporting growth, no particular type of industry saw a substantial increase in workforce size with Manufacturing the industry with the greatest reductions in workforce size.
- 9.5 The response from the business survey regarding recruitment of labour indicates the majority of businesses have had no problems. Where businesses have had problems it has generally been spread across a number of occupational areas, however the business survey results did indicate that the most difficulty was found recruiting Skilled Trade employees.
- 9.6 Our survey showed that good security features and cheap rents were particularly important for their site within Newham. The sectors that considered security a particular issue were in vehicle repair. The manufacturing sector considered cheap rents particularly important, which indicates a particular need to maintain affordable rates for businesses.
- 9.7 Each of the sub-areas within Newham, excluding Beckton, are particularly concerned with lower rental levels. The importance of security is also noted with sub areas, excluding Beckton and Stratford, seeing it as an important feature at their premises. As well as these two factors the employment areas of Canning Town, Silvertown and Docklands view HGV access, local site access and storage space as particularly important which is something that planning policy may consider in the future.
- 9.8 Despite the recent economic downturn, 81% of respondents did not believe that market conditions would contract over the next five years. This view was particularly strong within the Construction, Building and Architecture sector which is an indication of the continued growth in the service sector within the Borough.

- 9.9 The majority of businesses surveyed did not view relocation likely within the future suggesting general satisfaction with current premises. Furthermore of those that were moving it appears it is to facilitate expansion, a sign of steady growth within the economy. The majority of respondents that were planning to move planned to stay within the immediate vicinity of Newham, or at least the wider south east area indicating the strength of the area at retaining existing businesses.

10. APPENDIX

METHODOLOGY

THE SURVEY

- 10.1 The Survey was developed based on previous Employers' Surveys for Employment Land Reviews, but was also informed by a selection of surveys undertaken elsewhere in other local authorities, and consultation with local partners. .

FIELDWORK

- 10.2 An initial mail out to 1,300 businesses was made in August 2009 in order to make potential respondents aware that they may be requested to take part in this survey.
- 10.3 The phone calls were then carried out in September 2009 by Research & Marketing Limited. A total of 200 businesses took part, resulting in a response rate of 9%.

DATA ENTRY AND ANALYSIS

- 10.4 Data entry and analysis was undertaken using a combination of Microsoft Access, Excel and SPSS software systems. Both processes were employed using a precise and methodical approach. Readers should take care when considering percentage results from some of the subgroups within the main sample, as the base figures may sometimes be small. Due to rounding some graphs may not add up to 100%. Unless otherwise stated, all statistically significant differences are reported at the 95% confidence level.

BROAD INDUSTRIAL CLASSIFICATIONS

CLASSIFYING BROAD INDUSTRIAL GROUPS

- 10.5 Responding organisations were asked to specify their classification from a possible list of 13 possible broad industrial sections (several non applicable categories such as mining and quarrying and defence were omitted from the list). Responding organisations who did not know which category they fell into were allotted a category using the National Statistics, 'UK Standard Industrial Classification of Economic Activities 2003' publication. Listed below

are some examples of the types of businesses which fit into each of the 13 broad industrial sections:

<i>SECTION</i>	<i>EXAMPLES OF SECTION TYPE</i>
Agriculture; Forestry and Fishing:	Growing of crops; market gardening; horticulture, Agricultural and animal husbandry service activities, except veterinary activities
Electricity, Gas & Water Supply	Manufacture of gas; distribution of gaseous fuels through mains Collection, Purification and Distribution of Water
Manufacturing	Production, processing and preserving of meat and meat products Manufacture of builders' carpentry and joinery Manufacture of Pulp, Paper and Paper Products Publishing and Printing
Construction	General construction of buildings and civil engineering works Plastering / Plumbing Painting and glazing
Wholesale, Retail and Repairs	Sale, Maintenance and Repair of Motor Vehicles and Motorcycles Agents involved in the sale of timber and building materials Retail sale of pharmaceutical and medical goods, cosmetic and toilet articles
Hotels/Bars, Leisure and Restaurants	Licensed clubs Canteens and catering

Transport, Storage etc	Other scheduled passenger land transport Supporting And Auxiliary Transport Activities; Activities Of Travel Agencies Post and Telecommunications
Financial intermediation	Financial Intermediation, Except Insurance and Pension Funding, Insurance and Pension Funding, Except Compulsory Social Security, Activities Auxiliary to Financial Intermediation
Real Estate, Renting and Business Activities	Computer and Related Activities, Research and Development, Architectural and engineering activities and related technical consultancy, Traditional cleaning activities
Public Administration	Public Administration and Defence; Compulsory Social Security
Education	Adult and other education Driving school activities
Health and Social Work	Public sector hospital activities, including NHS Trusts Non-charitable social work activities with accommodation
Other Community etc.	Sewage and refuse disposal, sanitation and similar activities Recreational, Cultural and Sporting Activities Hairdressing and other beauty treatment

SAMPLE SURVEY

Please see below

London Borough of Newham – Business Telephone Survey

F1 Good morning/afternoon. My name is Agent Name from Research & Marketing Ltd.

We're conducting a business survey on behalf of Newham Council. The Council is undertaking a study into the economic development potential and employment land and premises requirements across the Borough.

The review will inform future planning policies which will be set out within Newham's Local Development Framework and help more generally to reflect business needs.

The survey may take up to 10 minutes

Could we speak with you now?

Please be assured that any information you give to us will be presented in a summary report and will not be attributable to any individual or company.

The survey is looking at needs for up to twenty years ahead and so should not be influenced by current market conditions but offer a longer term view.

- Yes
 No

If = 2, Prompt interviewee with message 'ASK TO CALL BACK. IF NOT, THANK AND CLOSE'

F1 Ask to get put through to someone from senior management who could answer questions with regards to your companies strategies and overall premises requirements.

Once put through please get name of the person

- Name is correct
 Other (specify)

F2 The Company name is S Company?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

- Company name is correct
 Other (specify)

F3 What is your postcode?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

Q1 Which of the following best reflects your company sector?**READ OUT - SINGLE ANSWER ONLY**

- Manufacturing
- Gas, Electricity and Water Supply
- Construction, building, architecture
- Wholesale and distribution
- Vehicle repair
- Retail trade
- Hotels & Catering
- Transport and communications
- Financial & professional services - e.g. IT, banking, consultancy, solicitor
- Real estate, renting & business activities
- Personal services – e.g. hairdressing
- Public administration & defence
- Education - schools and colleges
- Health & social work
- Community & social activities
- Other (specify)

Q2 For how long has your business been trading?**READ OUT - SINGLE ANSWER ONLY**

- Less than 5 years
- More than 5 years
- Don't Know (DON'T READ OUT)
- Refused (DON'T READ OUT)

Q3 In what year was your business established at its current location?**PLEASE ENTER DATE AS FOUR DIGIT NUMBER I.E. 1963****8888 DON'T KNOW****9999 REFUSED****Q4 Is this site?****READ OUT - SINGLE ANSWER ONLY**

- A single site (No related operations elsewhere)
- A national, regional or divisional headquarters (co-ordinating business operations across two or more sites)
- A branch, subsidiary or division with Headquarters elsewhere in the UK
- A branch, subsidiary or division with Headquarters outside of the UK
- Don't know (DO NOT READ OUT)
- Refused (DO NOT READ OUT)
- Other (specify)

Q5 Including yourself, in total how many employees are there at your site?**UNPROMPTED - WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT****8888 DON'T KNOW****9999 REFUSED**

Q6 How has the size of your workforce changed in the last three years?**READ OUT - SINGLE ANSWER ONLY**

- Grown
- Declined
- Stayed the same
- Don't Know (DO NOT READ OUT)
- Refused (DO NOT READ OUT)

We would now like you to ask some questions about your premises**Q7 What type of premises do you occupy?****UNPROMPTED - SINGLE ANSWER ONLY**

- Office
- High Quality Business Park
- Research Science Park
- Warehouse/Distribution
- General Industrial
- Heavy Industrial / Specialist Industrial site
- Small Start up premises
- Freight Terminal
- Site Specific Occupier / Single large occupier on own, large site
- Recycling facility
- Vacant land
- Other

Q8 Roughly when were your current premises developed?**READ OUT - SINGLE ANSWER ONLY**

- Pre-1950
- 1950 - 1969
- 1970 - 1989
- 1990 - 1999
- 2000+
- Don't know

Q9 What is the approximate floorspace of your premises?**READ OUT - SINGLE ANSWER ONLY**

- 0 - 1,000 Square Foot (SQ.FT) or 0 - 90 SQ. Meters (SQ.M)
- 1,001 - 3,000 SQ.FT or 91 - 280 SQ.M
- 3,001 - 5000 SQ.FT. or 281 - 460 SQ.M
- 5,001 - 10,000 SQ.FT or 461 - 930 SQ.M
- 10,001 - 20,000 SQ.FT or 931 - 1860 SQ.M
- OVER 20,001 SQ.FT or 1861SQ.M
- Don't Know (DON'T READ OUT)
- Refused (DON'T KNOW)

Q10 And what is the tenure of the site?**READ OUT - SINGLE ANSWER ONLY**

- Freehold
- Leasehold
- Rented
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)
- Other (specify)

Q11a How important is the location of your business with regards to the following factors?**Having good public transport links?****READ OUT - SINGLE ANSWER ONLY**

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q11b Fast access to the Motorway?**READ OUT - SINGLE ANSWER ONLY**

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q11c Access to an airport?**READ OUT - SINGLE ANSWER ONLY**

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q11d Being near to own residence?**READ OUT - SINGLE ANSWER ONLY**

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q11e Being located within a high quality area?**READ OUT - SINGLE ANSWER ONLY**

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q11f Being located close to your customers and/or suppliers?**READ OUT - SINGLE ANSWER ONLY**

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q11g Is there anything else which is important to your business when deciding to locate in an area?

UNPROMPTED - SINGLE ANSWER ONLY

IF YES PLEASE TYPE ANSWER IN OTHER

- No
 Other (specify)

For the next few questions we would like you to rate the following site and building characteristics. How important for your business operations is...

Q12a Cheap rents?

READ OUT - SINGLE ANSWER ONLY

- Very important
 Important
 Neither important nor unimportant
 Not important
 Not important at all

Q12b Being located in a high quality building (e.g. with air-conditioning, under-floor cabling etc)?

READ OUT - SINGLE ANSWER ONLY

- Very important
 Important
 Neither important nor unimportant
 Not important
 Not important at all

Q12c Good management / maintenance of the premises?

READ OUT - SINGLE ANSWER ONLY

- Very important
 Important
 Neither important nor unimportant
 Not important
 Not important at all

Q12d Good local site access?

READ OUT - SINGLE ANSWER ONLY

- Very important
 Important
 Neither important nor unimportant
 Not important
 Not important at all

Q12e Having heavy goods access to the premises?

READ OUT - SINGLE ANSWER ONLY

- Very important
 Important
 Neither important nor unimportant

- Not important
- Not important at all

Q12f Availability of parking for your staff?

READ OUT - SINGLE ANSWER ONLY

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q12g Having a yard/open storage space?

READ OUT - SINGLE ANSWER ONLY

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q12h Ability of premises to accommodate further growth?

READ OUT - SINGLE ANSWER ONLY

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q12i Having good security features?

READ OUT - SINGLE ANSWER ONLY

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q12j Having freehold ownership?

READ OUT - SINGLE ANSWER ONLY

- Very important
- Important
- Neither important nor unimportant
- Not important
- Not important at all

Q12k Is there another site or building factor that is important to your business?

UNPROMPTED - SINGLE ANSWER ONLY

IF YES PLEASE TYPE ANSWER IN OTHER

- No
- Other (specify)

Q13a Could you tell me if any of the following site and building constraints, affects your business?

READ OUT - MARK AS MANY APPLY

(15 maximum responses)

- The price of premises (b)
- Poor quality of premises (c)
- Poor management/maintenance of site/building (d)
- Poor local site access to the premises (e)
- Poor heavy goods access (f)
- Parking problems for staff (g)
- Lack of yard / open storage space (h)
- Ability of premises to accommodate further growth (i)
- Crime/ Security Concerns (j)
- Not owning the freehold ownership (k)
- Poor public transport links (l)
- Being too far from the Motorway (m)
- Poor quality area / environment (n)
- Neighbourhood issues (e.g. noise, litter) (o)
- Other (specify) (p)

If <> 1, do not ask 'Q13b'

If <> 2, do not ask 'Q13c'

If <> 3, do not ask 'Q13d'

If <> 4, do not ask 'Q13e'

If <> 5, do not ask 'Q13f'

If <> 6, do not ask 'Q13g'

If <> 7, do not ask 'Q13h'

If <> 8, do not ask 'Q13i'

If <> 9, do not ask 'Q13j'

If <> 10, do not ask 'Q13k'

If <> 11, do not ask 'Q13l'

If <> 12, do not ask 'Q13m'

If <> 13, do not ask 'Q13n'

If <> 14, do not ask 'Q13o'

If <> 15, do not ask 'Q13p'

Q13b How much of a problem is the price of premises?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't Know

Q13c How much of a problem is poor quality of premises?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't Know

Q13d How much of a problem is the poor management / maintenance of the site/building?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem

- Don't Know

Q13e How much of a problem is poor local access to the premises?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
 A problem
 A severe problem
 A critical problem
 Don't Know

Q13f How much of a problem is poor heavy goods access?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
 A problem
 A severe problem
 A critical problem
 Don't Know

Q13g How much of problem is access to parking for staff?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
 A problem
 A severe problem
 A critical problem
 Don't know

How much of a problem is worker access to site by cycling and walking

- Not a problem
 A problem
 A severe problem
 A critical problem
 Don't know

How much of a problem are access/facilities for disabled workers

- Not a problem
 A problem
 A severe problem
 A critical problem
 Don't know

Access to local services to meet daily needs (e.g. local convenience, workplace crèches etc)

- Not a problem
 A problem
 A severe problem
 A critical problem
 Don't know

Q13h How much of problem is the lack of a yard / open storage?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
 A problem
 A severe problem

- A critical problem
- Don't know

Q13i How much of problem is the ability of premises to accommodate further growth?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't know

Q13j How much of problem are crime / security concerns?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't know

Q13k How much of problem is not owning the freehold ownership?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't know

Q13l How much of a problem is poor public transport links?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't Know

Q13m How much of a problem is access to the Motorway system?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't Know

Q13n How much of problem is being located in a poor quality area?

READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't know

Q13o How much of problem are bad neighbourhood issues?
READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't know

Q13p How much of a problem is Q13p other?
READ OUT - SINGLE ANSWER ONLY

- Not a problem
- A problem
- A severe problem
- A critical problem
- Don't Know

We would now like you to ask you a few questions regarding your skills requirements
Q14 Approximately what percentage of your workforce are?
READ OUT (and enter percentages)

- Professional
- Semi-Skilled
- Unskilled
- Don't Know (DO NOT READ OUT)
- Refused (DO NOT READ OUT)

Q15 Have you identified any skills gaps in your current workforce, if so what would they be?
READ OUT LIST - MARK ALL THAT APPLY
 (10 maximum responses)

- Advanced IT or software skills
- Basic computer literacy skills
- Communication skills
- Customer handling skills
- Foreign language skills
- High level professional / technical skills
- Numeracy & Literacy skills
- Strategic / Management skills
- Team working skills
- Other (specify)
- None

Q16 Approximately, what proportion of your staff are Newham Residents?

- Less than 20%
- Less than 50%
- 50-70%
- 70-90%

Q16a How do you usually recruit permanent staff?

DO NOT READ OUT - SINGLE ANSWER ONLY

- Jobcentre Plus
- Workplace, Newham
- Advert in press
- Agency
- Other

Q16b Do you currently employ or have plans to employ Young Apprentices?

- Yes have
- Yes plan to
- No

Q16c If yes, how many and in what areas?

-

Q17 Have you had recruitment difficulties in any occupational areas? (e.g. administration, sales, customer service, etc)**READ OUT LIST - MARK ALL THAT APPLY**

(9 maximum responses)

- Managers and senior officials
- Professional occupations
- Associate professional and technical occupations (including skilled engineers)
- Administrative and secretarial occupations
- Skilled trades occupations
- Personal service occupations
- Sales and customer service occupations
- Process, plant and machine operatives
- Elementary occupations
- No recruitment problems
- Not recruited in past 2 years

We would now like you to ask you some questions regarding your engagement with other businesses and with the Council**Q18 How often do you attend business networking events?****READ OUT - SINGLE ANSWER ONLY**

- Once a month or more
- 10 to 7 times a year (more than every other month)
- 2 to 6 times a year
- Once a year
- Less then once a year
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)

Q19 Would you like to meet / network with other local businesses more regularly?**DO NOT READ OUT - SINGLE ANSWER ONLY**

- Yes
- No

- Don't know/ Not applicable

Q20 What kind of networking event would you find attractive?

READ OUT - MULTIPLE ANSWER POSSIBLE
(4 maximum responses)

- Purely social
- Informational (presentation on specific business related topic)
- Educational / training
- Other (specify)
- Don't know

Q21 What networking event format would suit you?

READ OUT - MULTIPLE ANSWER POSSIBLE
(5 maximum responses)

- Breakfast meeting
- Lunch
- Late afternoon / evening event
- Half day event
- Other (specify)
- Don't know

Q22a Has the Council engaged with you about any of the following in the last 2 years?

READ OUT – MULTIPLE ANSWER POSSIBLE

- Building Control
- Business Rates
- Business support/information
- Commercial property
- Council tenders and contracts
- Development Control (planning applications)
- Licensing
- Health and safety/food hygiene
- Planning strategies and guidance
- Town Centre Management
- Trade Waste
- Other (please specify)
- Don't know (don't read out)
- Refused (don't read out)

Q22b How did this impact on your business?

READ OUT – MULTIPLE ANSWERS POSSIBLE

- Positively
- Negatively – how?
- No impact

Q22c Do you feel you have adequate opportunity to engage with the Council about things that affect your business?

READ OUT - SINGLE ANSWER POSSIBLE

- Yes
- No

Q22d How would you like to engage with the Council with regards to policy making?

READ OUT - MULTIPLE ANSWERS POSSIBLE

- Through intermediary (such as Chamber of Commerce)
- Responding to surveys
- Attending informal networking events
- Attending formal meetings (such as a forum or steering group)
- Taking part in focus groups on particular topics
- One to one meetings or correspondence with a specific Council officer
- Other, please specify:
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)

We would now like you to ask you a couple of questions regarding the environment.

Q23 How important is it for your business to minimise your impact on the environment?

READ OUT - SINGLE ANSWER POSSIBLE

- Very important
- Important
- Not important
- Not important at all
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)

Q24 In what areas would you like advice and services to help you improve your business environmentally?

READ OUT - MULTIPLE ANSWERS POSSIBLE

- Waste reduction
- Recycling
- Energy consumption
- Water consumption
- Other, please specify:
- None
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)

I would now like to ask you some questions about the future of your business. Please look beyond the current downturn in the economy.

Q25 How do you expect the nature of your market to change over the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- Grow very strongly
- Grow gradually
- Stay about the same
- Contract slowly
- Contract significantly
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)

Q26 What changes do you anticipate in the size of your workforce for the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- Grow very strongly
- Grow gradually
- Stay about the same
- Contract slowly
- Contract significantly
- No real plan/play it by ear
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)

Q27 What changes do you anticipate in the size of your turnover for the next 5 years?**READ OUT - SINGLE ANSWER ONLY**

- Grow very strongly
- Grow gradually
- Stay about the same
- Contract slowly
- Contract significantly
- No real plan/play it by ear
- Don't know (DON'T READ OUT)
- Refused (DON'T READ OUT)

Q28a What is the likelihood of your business relocating some or all of your operations in the next 5 years?**READ OUT - SINGLE ANSWER ONLY**

- Certain / already planned
- Very likely
- Quite likely
- Quite unlikely
- Very unlikely
- Don't Know (DON'T READ OUT)
- Refused (DON'T READ OUT)

If = 4, 5, 6, 7, goto Q29

Q28b And why are you planning / considering to relocate some / all of your operations?**READ OUT AND CODE ALL THAT APPLY**

(11 maximum responses)

- Require larger premises to facilitate expansion
- Want to consolidate to a smaller site
- Require more suitable premises for operational purposes
- Price of premises too expensive
- Want to move into freehold premises
- Require better transport links
- Need to move nearer to customers / suppliers
- Having difficulty in recruiting / retain staff
- Relocate to a nicer area
- To realise the increased value of your site
- Other (specify)
- Don't Know (DON'T READ OUT)
- Refused (DON'T READ OUT)

Q28c Where are you / where would you consider moving?**READ OUT AND CODE ALL THAT APPLY**

(6 maximum responses)

- within the immediate vicinity
- elsewhere in Newham
- anywhere within South London
- anywhere within the South East
- anywhere within the UK
- Other (specify)
- Don't Know
- Refused

If = 1, 3, 4, 5, 6, goto Q31

That is the end of the survey. Newham Council are keen to support you and help meet your business needs.

Q29 Would you like to be contacted by the Council directly to follow up on the issues raised in the questionnaire?

- Yes
- No
- Don't Know
- Other (specify)

INTERVIEWERS PLEASE READ OUT TO ALL RESPONDENTS:

Thank you for your time - I can assure you that the information you have given will be treated as absolutely confidential.

If you wish to check the credentials of Research and Marketing Limited, I can provide the telephone number for the Market Research Society, who will be able to verify our company. Would you like to take the number? 0500 39 69 99

Please check your work because once you move on you will not be able to return to this record.

- Checking (Return to start of survey)
- Continue to end of survey

If = 1, goto 'F1'

Enter your initials to complete the survey