

Epping Forest District and Brentwood Borough Employment Land Review

Business Survey Results

Final

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Document History

JOB NUMBER: 5090999			DOCUMENT REF: V3			
0	Business Survey Results	RA	MT	RC	RC	Feb 10
1	Business Survey Results – Draft Final	RA	MT	RC	RC	Apr 10
2	Final	RA	MT	RS	RC	Sept 10
Revision	Purpose Description	Originated	Checked	Reviewed	Authorised	Date

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1. Business Survey

Introduction

- 1.1 Atkins was commissioned to undertake an employment land review of Epping Forest District and Brentwood Borough, with regard to the supply and demand of employment land. As part of this study, a business survey was conducted with local businesses.
- 1.2 The main objective of the survey was to provide a statistically significant, empirical basis for assessing future business needs in Epping Forest District and Brentwood Borough, having particular regard to requirements for employment land and premises. In accordance with ODPM best-practice, the business survey provides an important strand of analysis used to inform our assessment of future employment land and floor space requirements in both local authority areas.
- 1.3 This report sets out the detailed tables and a summary of the findings of the business survey and is presented as an appendix to the main study report.
- 1.4 The report is structured into the following Sections:
 - Methodology.
 - Survey sample details.
 - Survey results.
 - Summary of business survey results.
 - Total expansion requirements: survey-based forecasts.
 - Full survey results: tables.

Methodology

- 1.5 A survey of indigenous businesses within Epping Forest District and Brentwood Borough was conducted (January 2010) in order to provide a statistically significant assessment of needs amongst the business community of both local authority areas. This provides an empirical source of data which can be used to supplement analysis provided by the manipulation of secondary data sources.
- 1.6 The key topics researched included:
 - Employment information;
 - Type of ownership;
 - Size of premises;
 - Land and premises requirements; and
 - Future plans, including expansion and relocation.

Survey Process

- 1.7 The information was collected through a series of 15 minute interviews with 250 businesses (125 in each authority) located within the study area. Interviews were conducted with owners, managers and directors.

Survey Sample

- 1.8 The sample frame was taken from the Annual Business Inquiry whilst the sample itself was drawn from the Experian business database. It is important to highlight that the sample included private sector business types only, likely to accommodate B-use class floor space.
- 1.9 The survey was carried out with 250 businesses, representing nearly 6.4% of all B-use class businesses in the study area. Six industry sectors, three size bands and five sub-regions were devised. The sectors were:
- B-use manufacturing;
 - B-use construction;
 - B-use distribution & wholesale;
 - B-use transport & communications;
 - B-use banking, finance & insurance; and
 - B-use other services.
- 1.10 The business size bands¹ were:
- Micro (1 – 4 employees);
 - Small (5 -10 employees);
 - Medium (11 - 99 employees); and
 - Large (100 + employees).
- 1.11 The sub-regions were based on post code areas that have been grouped as follows:
- Epping Forest District
 - Waltham Abbey (EN9 1 , EN9 3);
 - Nazeing (EN9 2);
 - Loughton (IG10 1, IG10 2, IG10 3, IG10 4);
 - Epping (CM16 4, CM16 5);
 - Ongar (CM5 0, CM5 9); and
 - North Weald (CM16 6).
 - Brentwood Borough
 - Brentwood (CM13 1, CM13 2, CM13 4, CM13 8, CM13 9);
 - Ingatestone (CM4 0, CM9 9);
 - Rural North (CM14 5, Cm15 0); and
 - Rural South (CM13 3).

Survey Outputs

- 1.12 The remainder of this report details the main findings from the telephone surveys. The results shown here are not weighted.

¹ N.B the bands used in the socio-economic assessment vary slightly as a result of availability of data.

- 1.13 The findings have been analysed by industry sector and company size (in terms of the number of employees) where appropriate.
- 1.14 It should be noted that for questions that were not asked to the entire sample population, the number of responses for certain sectors of business sizes may be small. Care should therefore be taken when interpreting such results.

Survey Sample Details

- 1.15 The following tables set out the survey sample population by industry and by size of business and location. The proportion of small businesses surveyed was reduced from their actual proportion in the economy to ensure that a significant number of medium and large businesses could be surveyed. Overall however, the tables below confirm that the representation of each sector and business size in the survey sample was broadly in line with that of the study area.

Table 1.1 – Survey Sample Details (Epping Forest District)

	Total Businesses		Survey Interviews	
	No.	% of Total	No.	% of Total
By Sector				
Banking, Finance & Insurance	1,400	36	32	26
Construction	638	16	23	18
Distribution & Wholesale	1,097	28	32	26
Manufacturing	266	7	24	19
Other Services	316	8	4	3
Transport & Communications	162	4	10	8
Total	3,879	100	125	100
By Size				
1 – 10	3,538	91	65	52
11 – 49	287	7	44	35
50 – 199	38	1	12	10
200 +	16	0	4	3
Total	3,879	100	125	100
By Location				
Waltham Abbey	698	18	26	21
Nazeing	357	9	9	7
Loughton	1,314	34	43	34
Epping	446	11	9	7

	Total Businesses		Survey Interviews	
	No.	% of Total	No.	% of Total
Ongar	617	16	17	14
North Weald	447	12	13	10
Rural South	698	18	26	21
Total	3,879	100	125	100

Table 1.2 – Survey Sample Details – (Brentwood Borough)

	Total Businesses		Survey Interviews	
	No.	% of Total	No.	% of Total
By Sector				
Banking, Finance & Insurance	1,441	42	32	26
Construction	513	15	23	18
Distribution & Wholesale	825	24	32	26
Manufacturing	171	5	24	19
Other Services	288	8	4	3
Transport & Communications	161	5	10	8
Total	3,399	100	125	100
By Size				
1 – 10	3,073	90	65	52
11 – 49	263	8	44	35
50 – 199	51	2	12	10
200 +	12	0	4	3
Total	3,399	100	125	100
By Location				
Brentwood	1,913	56	57	45
Ingatestone	281	8	12	10
Rural North	719	21	19	50
Rural South	486	14	37	30
Total	3,399	100	125	100

Summary of Business Survey Results

Business Epping Forest District

- 1.16 On average nearly three quarters (71%) of surveyed businesses' employees live within 10 miles of the business. Most notably, businesses located in Nazeing had the highest proportion of locally based employees, averaging 100% and the Rural South the lowest, averaging 58%.
- 1.17 On average, 81% of employees in the study area travel to work by car. Walking is the second most popular mode of transport with 11% of employees travelling to work on foot. Use of public transport is fairly limited with an average of 3% using bus, and 4% travelling by train. 1% cycle to work. The Rural South has the highest proportion of car use with an average of 99% of employees driving to work. Car use is lowest in Epping (72%) and North Weald (73%).
- 1.18 In terms of businesses' customers, on average 24% are located within Epping Forest District. This is highest for businesses located in Loughton (30%) and those in the Transport and Communications sector (43%). As might be expected small businesses tend to have a more localised customer base, however those large businesses with 100 -199 employees have the highest average proportion of customers from the District, at 52%.
- 1.19 Although on average only 24% of customers are based in the District, the proportion of customers based in Essex² as a whole is much greater with an average of 47%. This is highest for businesses located in Epping and in the other services sector. Business in Epping have a large proportion of customers (28% on average) that are based in London.
- 1.20 35% of surveyed businesses have been established in Epping Forest District for over twenty years. The larger the business the longer they were likely to have been established in the area for, indicating a strong trend for indigenous business growth as opposed to inward investment. Epping, Ongar and Loughton have the highest proportion of businesses that have been established for over 20 years.

Table 1.3 – Local Linkages (Epping Forest District)

	% of employees living within 10 miles	% of Customers based in Epping Forest District	% of customers based in Essex
By Sector			
Banking, Finance & Insurance	79	19	38
Construction	53	22	52
Distribution & Wholesale	72	35	66
Manufacturing	62	9	24
Other Services	99	37	70
Transport & Communications	88	43	58
Total	71	24	47

² Includes Epping, Brentwood and Rest of Essex.

	% of employees living within 10 miles	% of Customers based in Epping Forest District	% of customers based in Essex
By Size			
Micro (1 - 4)	79	33	61
Small (5 – 10)	75	26	42
Medium (11 – 24)	67	8	30
Medium (25 – 49)	66	17	39
Medium (50 – 99)	64	14	47
Large (100 – 199)	52	52	62
Large (200 +)	44	7	35
Total	71	24	47
By Location			
Waltham Abbey	61	22	45
Nazeing	100	15	36
Loughton	67	30	50
Epping	88	41	74
Ongar	66	12	44
North Weald	83	21	37
Rural South	58	20	50
Total	71	24	47

Current Business Premises Epping Forest District

- 1.21 Leasehold is the most common form of tenure, with 48% of respondents occupying their premises on this basis, followed by freehold with 24% of respondents. North Weald and the Rural South have the highest proportion of leasehold businesses (62% and 63% respectively). Over a quarter (30%) of micro businesses either work from home or through mobile working. The other services sector is the most likely to have businesses based at home, with 25% of respondents working from home.
- 1.22 The average premises size of survey respondents was 1,158m². Businesses of 50 – 99 employees have the biggest average premises size (4,911m²). As might be expected the distribution and wholesale sector have the largest average premises size (2,340m²) whilst the transport and communications sector have the smallest average premises size (74m²). Satisfaction with current business premises was very high with only 2% of respondents stating that their current business premises were unsuitable for the ongoing operation of their business. Those based in Loughton were most likely to think that their premises were unsuitable although only 5% thought premises were unsuitable. Those based in Nazeing and large businesses were most likely to think that their premises were very suitable.

- 1.23 The main reason given for current premises being unsuitable was that the site/premises were too small, this was particularly an issue for those businesses in Nazeing and the Rural South that thought their premises were unsuitable. Other notable reasons were high business rates, lack of car parking and age of premises.

Expansion Plans Epping Forest District

- 1.24 Of surveyed businesses, 42% said that there were planning to expand. 75% of surveyed other services said that they were planning to expand, those businesses in the manufacturing sector have the lowest proportion of businesses that say that they would expand and these sector also has the highest proportion of businesses that say they may downsize. On the whole the larger the business the more likely they were to be planning to expand.

Table 1.4 – Expansion Plans (Epping Forest District)

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	13	41	18	56	1	3	32	100
Construction	10	44	13	56	-	-	23	100
Distribution & Wholesale	14	43	17	53	1	3	32	100
Manufacturing	8	33	13	54	3	13	24	100
Other Services	3	75	1	25	-	-	4	100
Transport & Communications	5	50	5	50	-	-	10	100
Total	53	42	67	53	5	4	125	100
By Size								
Micro (1 - 4)	15	32	28	60	4	9	47	100
Small (5 – 10)	7	39	11	61	-	-	18	100
Medium (11 – 24)	12	46	14	54	-	-	26	100
Medium (25 – 49)	7	39	10	56	1	6	18	100
Medium (50 – 99)	4	67	2	33	-	-	6	100
Large (100 – 199)	5	83	1	17	-	-	6	100
Large (200 +)	3	75	1	25	-	-	4	100
Total	53	42	67	53	5	4	125	100
By Location								
Waltham Abbey	9	35	14	53	3	12	26	100
Nazeing	2	22	7	78	-	-	9	100
Loughton	19	44	23	53	1	11	43	100
Epping	5	56	3	33	1	11	9	100

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
Ongar	11	65	6	35	-	-	17	100
North Weald	7	54	6	46	-	-	13	100
Rural South	-	-	8	100	-	-	8	100
Total	53	42	67	53	5	4	125	100

1.25 43% of those planning to expand said that their plans would create a need for additional floorspace. On average 1,501m² of additional floorspace was expected to be needed to accommodate expansion plans.

1.26 The majority of businesses (83%) of respondents said they would not be able to accommodate their additional floorspace needs on their existing site/premises (either through extension, refurbishment, redevelopment or more intensive use).

Relocation - Epping Forest District

1.27 Of surveyed businesses, 22% have considered relocating. Small businesses are most likely to have considered relocating, whilst businesses in Waltham Abbey and those in the manufacturing sector are most likely to have considered relocating. Of those that have considered relocating, 39% have considered a location within Epping Forest and 18% have considered relocating elsewhere in Essex, 24% have considered relocating in Hertfordshire.

1.28 Of those who have considered relocating, the preferred types of locations are a town centre/commercial district (31%) and a dedicated industrial area (31%). Well over 2/3 of businesses think that the type of premises that they are after is available in Epping whilst only 8% think that it isn't, with the remainder uncertain.

Business Brentwood Borough

1.29 On average nearly three quarters (70%) of surveyed businesses' employees live within 10 miles of the business. Businesses located in Brentwood had the highest proportion of locally based employees, averaging 75% and the Rural South the lowest, averaging 62%.

1.30 On average, 80% of employees in the study area travel to work by car. Walking is the second most popular mode of transport with 10% of employees travelling to work on foot. Bus use is fairly limited with only 3% using the bus. 7% travel to work by train. 1% on average cycle to work. The Rural South has the highest proportion of car use with an average of 92% of employees driving to work. Car use is lowest in Brentwood (68%) where the highest proportion of train (11%) and walking (16%) are present.

1.31 In terms of businesses' customers, on average 29% are located within the Borough. This is highest for businesses located in Brentwood and the Rural North (40%) and those in the Transport and Communications sector (36%). As might be expected small businesses tend to have a more localised customer base (micro businesses have 41 % of customers based in the Borough), however those large businesses with 100 -199 employees have one of the highest average proportion of customers from Brentwood at 29%.

1.32 Although on average only 29% of customers are based in the Borough, the proportion of customers based in Essex³ as a whole is much greater with an average of 54%. This is highest for businesses located in the Rural North (76%) and in the other services sector (76%). Businesses in

³ Includes Epping, Brentwood and Rest of Essex.

Brentwood Borough have a large proportion of customers (18% on average) based in London and this is highest for businesses based in Brentwood and the Rural South.

- 1.33 Nearly a quarter (22%) of surveyed businesses have been established in Brentwood Borough for over twenty years. A large proportion 44% of small businesses (5 -10 employees) have been established for over 20 years. The proportion of well established businesses varies little across the Borough, although the Rural North has a slightly higher proportion (26%) of businesses that have been established for over 20 years than elsewhere, whilst Ingatestone has the lowest proportion (17%).

Table 1.5 – Local Linkages (Brentwood Borough)

	% of employees living within 10 miles	% of Customers based in Brentwood	% of customers based in Essex
By Sector			
Banking, Finance & Insurance	71	29	52
Construction	74	32	62
Distribution & Wholesale	69	30	59
Manufacturing	78	18	34
Other Services	100	30	76
Transport & Communications	48	36	51
Total	70	29	54
By Size			
Micro (1 - 4)	88	41	68
Small (5 – 10)	69	29	54
Medium (11 – 24)	50	13	38
Medium (25 – 49)	54	15	44
Medium (50 – 99)	61	3	16
Large (100 – 199)	49	29	46
Large (200 +)	100	-	-
Total	70	29	54
By Location			
Brentwood	75	40	62
Ingatestone	68	6	33
Rural North	73	40	76
Rural South	62	11	35

	% of employees living within 10 miles	% of Customers based in Brentwood	% of customers based in Essex
Total	70	29	54

Current Business Premises Brentwood Borough

- 1.34 Leasehold is the most common form of tenure, with 43% of respondents occupying their premises on this basis, followed by freehold with 21% of respondents. Brentwood and the Rural South have the highest proportion of leasehold businesses (42% and 51% respectively). 38% of micro businesses either work from home or through mobile working. The other services sector is the most likely to have businesses based at home, with 50% of respondents working from home.
- 1.35 The average premises size of survey respondents was 1,016m². Large businesses with 100 – 199 employees have the biggest average premises size (8,169m²). As might be expected the distribution and wholesale sector have the largest average premises size (2,2m²) whilst the construction sector have the smallest average premises size (427m²). Satisfaction with current business premises was very high with only 5% of respondents stating that their current business premises were unsuitable for the ongoing operation of their business. Those based in the Rural South were most likely to think that their premises were unsuitable although. Those based in Ingatestone and large businesses were most likely to think that their premises were very suitable.
- 1.36 The main reason given for current premises being unsuitable was that the site/premises were too small, this was particularly an issue for those businesses in the Rural North that thought their premises were unsuitable. Other notable reasons were lack of car parking, high business rates, and age of premises.

Expansion Plans Brentwood Borough

- 1.37 Of surveyed businesses, 43% said that they were planning to expand. 58% of surveyed transport and communications businesses said that they were planning to expand, although this is the sector that also has the highest proportion of businesses saying they may downsize in future. Businesses in the construction sector have the lowest proportion of businesses that say that they would expand (29%). On the whole medium sized business are more likely to be planning to expand.

Table 1.6 – Expansion Plans (Brentwood Borough)

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	18	45	22	55	-	-	40	100
Construction	8	29	17	61	3	11	28	100
Distribution & Wholesale	11	41	16	60	-	-	27	100
Manufacturing	9	56	5	31	2	13	16	100
Other Services	1	50	1	50	-	-	2	100
Transport & Communications	7	58	3	25	2	17	12	100
Total	54	43	64	51	7	6	125	100

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
By Size								
Micro (1 - 4)	20	40	26	52	4	8	50	100
Small (5 – 10)	11	41	15	56	1	4	27	100
Medium (11 – 24)	8	33	15	63	1	4	24	100
Medium (25 – 49)	10	71	3	21	1	7	14	100
Medium (50 – 99)	2	67	1	33	-	-	3	100
Large (100 – 199)	3	50	3	50	-	-	6	100
Large (200 +)	-	-	1	100	-	-	1	100
Total	54	43	64	51	7	6	125	100
By Location								
Brentwood	26	46	28	49	3	5	57	100
Ingatstone	5	42	7	58	-	-	12	100
Rural North	7	37	12	63	-	-	19	100
Rural South	16	43	17	46	4	11	37	100
Total	54	43	64	51	7	6	125	100

1.38 50% of those planning to expand said that their plans would create a need for additional floorspace. On average 581m² of additional floorspace was expected to be needed to accommodate expansion plans.

1.39 The majority of businesses (59%) of respondents said they would not be able to accommodate their additional floorspace needs on their existing site/premises (either through extension, refurbishment, redevelopment or more intensive use).

Relocation – Brentwood Borough

1.40 Of surveyed businesses, 16% have considered relocating. Medium sized businesses are most likely to have considered relocating, as are businesses in the Rural South and those in the manufacturing sector. Of those that have considered relocating, 48% have considered a location within Brentwood and 44% have considered relocating elsewhere in Essex, only 8% have considered relocating outside Essex.

1.41 Of those who have considered relocating, the preferred types of locations are dedicated industrial area (42%) and mixed use area (33%). Well over 58% of businesses think that the type of premises they require is available in the Borough, 33% think it is not, with the remainder uncertain.

Total Expansion Requirements: Survey Based Forecasts

1.42 Using data from the Annual Business Inquiry we can provide indicative estimates of the total number of B-use class businesses in Epping Forest District and Brentwood Borough by size. By applying the sample results to reflect the total number of B-use class businesses, estimates can be provided of the total expansion requirements of indigenous businesses in the study area.

- 1.43 In order to calculate a forecast of future demand, floorspace requirements are calculated based on only those respondents who said that they would definitely be expanding and would need additional floor space. The figures are then further analysed using data from the questions on floor space requirements, and relocation questions (in order to avoid over estimating potential floorspace requirements the largest outliers were removed).
- 1.44 Table 1.7, uses the average floor space requirement figure from the survey for small businesses (115sqm) and 562 sqm for medium and large business, equating to an overall average of 45,215sqm for Epping. For Brentwood the figures are for small businesses (78 sqm) and 1,148 sqm for medium and large business, equating to an overall average of 41,833 sqm.

Table 1.7 – Expansion floor space requirements (sqm)

Area	Size of Business		Total
	Small	Medium & large	
Epping	115	562	45,215
Brentwood	78	1,148	41,833

- 1.45 The forecast gives a floor space requirement of approximately 45,000 sqm for Epping Forest District and 42,000 sqm for Brentwood Borough.
- 1.46 It is important to highlight three key factors when looking at the estimates set out above.
- The estimates exclude B-use class requirements of public sector organisations.
 - The estimates refer only to the additional floor space requirements of indigenous businesses.
 - The potential requirements of inward investors to the study area are not included.
 - The estimates are solely based on business survey responses and are likely to include a high degree of optimism. Therefore these figures only inform our floor space forecasts and as such should be read with consideration to the full forecast analysis as set out in the appendices.

Full Business Survey Results: Tables (Epping Forest District)

A: Business

Question A2: Approximately how many people do you employ

Table 1.8 – Average Number of Employees (Epping Forest District)

	Average no. employees	No. respondents
By Sector		
Banking, Finance & Insurance	25	32
Construction	56	23
Distribution & Wholesale	20	32
Manufacturing	11	24
Other Services	37	4

	Average no. employees	No. respondents
Transport & Communications	12	10
Total	26	125
By Size		
Micro (1 - 4)	2	47
Small (5 – 10)	7	18
Medium (11 – 24)	16	26
Medium (25 – 49)	36	18
Medium (50 – 99)	64	6
Large (100 – 199)	112	6
Large (200 +)	237	4
Total	26	125
By Location		
Waltham Abbey	25	26
Nazeing	8	9
Loughton	44	43
Epping	18	9
Ongar	13	17
North Weald	19	13
Rural South	8	8
Total	26	125

Question A3: What Proportion of your employees come from the following distances?

Table 1.9 – Travel to Work Distance (Epping Forest District)

	Average proportion of employees (%)				
	0-4 miles	5-10 miles	11 – 15 miles	16 – 20 miles	20 + miles
By Sector					
Banking, Finance & Insurance	56	23	10	5	7
Construction	35	18	15	11	21
Distribution & Wholesale	47	25	14	3	11

	Average proportion of employees (%)				
	0-4 miles	5-10 miles	11 – 15 miles	16 – 20 miles	20 + miles
Manufacturing	37	25	7	12	18
Other Services	39	60	1	-	-
Transport & Communications	84	4	11	-	-
Total	48	23	11	6	12
By Size					
Micro (1 - 4)	60	19	9	4	7
Small (5 – 10)	41	34	12	1	12
Medium (11 – 24)	40	27	9	8	16
Medium (25 – 49)	46	20	16	11	8
Medium (50 – 99)	48	16	14	10	12
Large (100 – 199)	27	25	13	11	26
Large (200 +)	29	15	13	13	31
Total	47	23	11	6	12
By Location					
Waltham Abbey	47	14	13	15	12
Nazeing	43	57	-	-	-
Loughton	48	19	13	5	14
Epping	50	38	4	6	2
Ongar	55	11	9	8	17
North Weald	50	33	8	1	9
Rural South	31	27	23	-	19
Total	47	23	11	6	12

Question A4: What proportion of your employees travel by the following modes of transport?

Table 1.10 – Travel to work Mode (Epping Forest District)

	Average proportion of employees (%)				
	Car	Bus	Train	Walk	Cycle
By Sector					
Banking, Finance &	78	4	6	11	-

	Average proportion of employees (%)				
	Car	Bus	Train	Walk	Cycle
Insurance					
Construction	83	4	3	10	-
Distribution & Wholesale	85	2	1	12	-
Manufacturing	82	1	8	7	2
Other Services	80	6	6	8	-
Transport & Communications	71	5	5	19	-
Total	81	3	4	11	1
By Size					
Micro (1 - 4)	76	-	2	22	-
Small (5 – 10)	88	3	3	5	1
Medium (11 – 24)	85	4	6	3	1
Medium (25 – 49)	81	7	6	5	1
Medium (50 – 99)	82	3	7	7	1
Large (100 – 199)	73	8	11	8	-
Large (200 +)	89	4	3	3	1
Total	81	3	4	11	1
By Location					
Waltham Abbey	80	2	6	11	-
Nazeing	89	-	-	7	4
Loughton	81	4	5	10	1
Epping	72	3	2	23	-
Ongar	78	3	5	13	-
North Weald	76	7	7	10	-
Rural South	99	1	-	-	-
Total	81	3	4	11	1

Question A5: What proportion of your main customers come from the follow locations?

Table 1.11 – Location of main Customers (Epping Forest District)

	Epping Forest	Brent wood	Rest of Essex	London	Herts	Rest South East	Rest UK	International
By Sector								
Banking, Finance & Insurance	19	3	16	37	3	11	7	3
Construction	22	5	25	37	4	4	3	-
Distribution & Wholesale	35	5	26	8	7	5	11	3
Manufacturing	9	1	14	36	4	8	19	10
Other Services	37	3	30	20	2	5	3	-
Transport & Communications	43	4	11	12	14	1	7	7
Total	24	3	20	28	5	7	9	4
By Size								
Micro (1 - 4)	33	5	23	21	5	4	6	3
Small (5 – 10)	26	2	14	28	3	8	18	1
Medium (11 – 24)	8	2	20	34	6	12	11	7
Medium (25 – 49)	17	2	20	37	7	7	4	5
Medium (50 – 99)	14	1	32	12	3	1	23	14
Large (100 – 199)	52	4	6	17	3	3	14	2
Large (200 +)	7	5	23	46	-	18	-	-
Total	24	3	20	28	5	7	9	4
By Location								
Waltham Abbey	22	2	21	32	9	3	10	1
Nazeing	15	5	16	42	4	14	4	-
Loughton	30	2	18	25	5	6	9	5
Epping	41	9	24	17	1	4	3	1
Ongar	12	7	25	24	3	7	15	6
North Weald	21	2	14	35	5	7	6	10
Rural South	20	1	29	14	6	17	13	-
Total	24	3	20	28	5	7	9	4

Base: 108 respondents

Question A6: How long has your operation been established in Epping?**Table 1.12 – Length of Time in Epping Forest District**

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Banking, Finance & Insurance	1	3	6	19	6	19	4	13	4	13	11	34	-	-	32	100
Construction	3	13	3	13	5	22	1	4	1	4	10	43	-	-	23	100
Distribution & Wholesale	-	-	6	19	6	19	6	19	2	6	12	38	-	-	32	100
Manufacturing	1	4	5	21	4	17	2	8	5	21	7	29	-	-	24	100
Other Services	-	-	2	50	-	-	-	-	1	-	1	-	-	-	4	100
Transport & Communications	-	-	4	40	2	20	-	-	1	10	3	30	-	-	10	100
Total	5	4	26	21	23	18	13	10	14	11	44	35	-	-	125	100
By Size																
Micro (1 - 4)	3	6	17	36	11	23	2	4	6	13	8	17	-	-	47	100
Small (5 – 10)	1	6	-	-	6	33	2	11	1	6	8	44	-	-	18	100
Medium (11 – 24)	-	-	5	19	2	8	5	19	4	15	10	38	-	-	26	100
Medium (25 – 49)	-	-	2	11	2	11	3	17	3	17	8	44	-	-	18	100
Medium (50 – 99)	-	-	1	17	1	17	-	-	-	-	4	67	-	-	6	100
Large (100 – 199)	-	-	1	17	1	17	1	17	-	-	3	50	-	-	6	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Large (200 +)	1	25	-	-	-	-	-	-	-	-	3	75	-	-	4	100
Total	5	4	26	21	23	18	13	10	14	11	44	35	-	-	125	100
By Location													-	-		
Waltham Abbey	2	8	10	38	7	27	1	4	2	7	4	15	-	-	26	100
Nazeing	-	-	1	11	3	33	1	11	3	33	1	11	-	-	9	100
Loughton	2		6	14	6	14	5	12	5	12	19	44	-	-	43	100
Epping	-	-	3	33	1	11	1	11	-	-	4	44	-	-	9	100
Ongar	-	-	3	18	2	12	2	12	2	12	8	47	-	-	17	100
North Weald	1		2	15	2	15	2	15	1	7	5	38	-	-	13	100
Rural South	-	-	1	13	2	25	1	13	1	13	3	37	-	-	8	100
Total	5	4	26	21	23	18	13	10	14	11	44	35	-	-	125	100

B: Premises**Question B1:** How long has business operated out of the premises which you currently occupy?**Table 1.13 – Length of Time at Existing Premises (Epping Forest District)**

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Banking, Finance & Insurance	1	3	9	28	8	25	3	9	2	6	9	28	-	-	32	100
Construction	4	17	8	35	3	13	5	22	1	4	2	9	-	-	23	100
Distribution & Wholesale	-	-	6	19	6	19	6	19	3	9	11	34	-	-	32	100
Manufacturing	1	4	5	21	7	29	2	8	1	4	8	33	-	-	24	100
Other Services	-	-	2	50	-	-	-	-	1	25	1	25	-	-	4	100
Transport & Communications	-	-	6	60	1	10	-	-	1	10	2	20	-	-	10	100
Total	6	5	36	29	25	20	16	13	9	7	33	26	-	-	125	100
By Size																
Micro (1 - 4)	3	6	18	38	12	26	3	6	4	9	7	14	-	-	47	100
Small (5 – 10)	1	6	3	17	4	22	3	17	-	-	7	39	-	-	18	100
Medium (11 – 24)	-	-	9	35	2	7	5	19	3	12	7	27	-	-	26	100
Medium (25 – 49)	1	6	2	11	3	17	4	22	2	11	6	33	-	-	18	100
Medium (50 – 99)	-	-	1	17	1	17	1	17	-	-	3	50	-	-	6	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Large (100 – 199)	-	-	1	17	2	33	-	-	-	-	3	50	-	-	6	100
Large (200 +)	1	25	2	50	1	25	-	-	-	-	-	-	-	-	4	100
Total	6	5	36	29	25	20	16	13	9	7	33	26	-	-	125	100
By Location																
Waltham Abbey	2	7	9	35	8	31	1	4	2	7	4	15	-	-	26	100
Nazeing	-	-	1	11	4	44	2	22	1	11	1	11	-	-	9	100
Loughton	2	5	10	23	7	16	6	14	3	7	15	35	-	-	43	100
Epping	-	-	5	55	-	-	-	-	-	-	4	44	-	-	9	100
Ongar	1	6	6	35	2	12	1	6	2	12	5	29	-	-	17	100
North Weald	1	8	4	31	1	7	5	38	1	8	1	7	-	-	13	100
Rural South	-	-	1	12	3	38	1	12	-	-	6	38	-	-	8	100
Total	6	5	36	29	25	20	16	13	9	7	33	26	-	-	125	100

Question B2: By What tenure do you occupy your premises?

Table 1.14 – Tenure of Premises (Epping Forest District)

	Freehold		Leasehold		License		Work from Home		Mobile Working		Other		Don't know / no response		Rented		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																		

	Freehold		Leasehold		License		Work from Home		Mobile Working		Other		Don't know / no response		Rented		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Banking, Finance & Insurance	6	19	17	53	2	6	3	9	-	-	-	-	2	6	2	6	32	100
Construction	7	30	7	30	1	4	2	9	3	13	-	-	-	-	3	13	23	100
Distribution & Wholesale	9	28	16	50	1	3	-	-	2	6	-	-	1	3	3	9	32	100
Manufacturing	6	25	15	62	1	4	1	4	1	4	-	-	-	-	-	-	24	100
Other Services	1	25	1	25	1	25	1	25	-	-	-	-	-	-	-	-	4	100
Transport & Communications	1	10	4	40	-	-	1	10	2	20	-	-	1	10	1	10	10	100
Total	30	24	60	48	6	5	8	6	8	6	-	-	4	3	9	7	125	100
By Size																		
Micro (1 - 4)	4	9	22	47	3	6	7	15	7	15	-	-	2	4	2	4	47	100
Small (5 – 10)	6	33	7	39	-	-	-	-	1	6	-	-	1	6	3	17	18	100
Medium (11 – 24)	6	23	18	69	-	-	-	-	-	-	-	-	-	-	2	8	26	100
Medium (25 – 49)	7	39	7	39	2	11	1	6	-	-	-	-	-	-	1	6	18	100
Medium (50 – 99)	2	33	3	50	-	-	-	-	-	-	-	-	1	17	-	-	6	100
Large (100 – 199)	1	17	3	50	1	17	-	-	-	-	-	-	-	-	1	17	6	100
Large (200 +)	4	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4	100
Total	30	24	60	48	6	5	8	6	8	6	-	-	4	3	9	7	125	100
By Location																		

	Freehold		Leasehold		License		Work from Home		Mobile Working		Other		Don't know / no response		Rented		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Waltham Abbey	5	19	13	50	2	7	2	7	1	4	-	-	-	-	3	11	26	100
Nazeing	4	44	3	33	-	-	1	11	-	-	-	-	-	-	1	11	9	100
Loughton	10	23	20	47	2	5	3	7	4	9	-	-	2	5	2	5	43	100
Epping	1	11	4	44	-	-	1	11	2	22	-	-	1	11	-	-	9	100
Ongar	5	29	7	41	2	12	-	-	1	6	-	-	-	-	2	12	17	100
North Weald	3	23	8	62	-	-	1	8	-	-	-	-	-	-	1	8	13	100
Rural South	2	25	5	63	-	-	-	-	-	-	-	-	1	12	-	-	8	100
Total	30	24	60	48	6	5	8	6	8	6	-	-	4	3	9	7	125	100

Question B2ii): For those that answered leasehold above what is the remaining length of lease?

Table 1.15 – Length of Lease Remaining (Epping Forest District)

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Banking, Finance & Insurance	3	18	6	35	3	18	-	-	-	-	-	-	5	29	17	100
Construction	-	-	3	43	-	-	1	14	-	-	1	14	2	29	7	100
Distribution & Wholesale	3	19	7	44	-	-	1	6	1	6	1	6	3	19	16	100
Manufacturing	2	13	5	33	1	7	-	-	-	-	1	7	6	40	15	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Other Services	-	-	-	-	-	-	1	100	-	-	-	-	-	-	1	100
Transport & Communications	1	25	1	25	-	-	-	-	-	-	-	-	2	50	4	100
Total	9	15	22	37	4	7	3	5	1	2	3	5	18	30	60	100
By Size																
Micro (1 - 4)	3	14	12	54	-	-	-	-	-	-	1	5	6	27	22	100
Small (5 – 10)	2	29	2	29	1	14	1	14	-	-	-	-	1	14	7	100
Medium (11 – 24)	4	22	4	22	1	6	1	6	-	-	2	11	6	33	18	100
Medium (25 – 49)	-	-	2	29	1	14	1	14	1	14	-	-	2	29	7	100
Medium (50 – 99)	-	-	-	-	1	33	-	-	-	-	-	-	2	67	3	100
Large (100 – 199)	-	-	2	67	-	-	-	-	-	-	-	-	1	33	3	100
Large (200 +)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100
Total	9	15	22	37	4	7	3	5	1	2	3	5	18	30	60	100
By Location																
Waltham Abbey	1	8	7	54	2	15	-	-	-	-	1	8	2	15	13	100
Nazeing	-	-	1	33	-	-	-	-	-	-	-	-	2	67	3	100
Loughton	2	10	8	40	-	-	2	10	-	-	1	5	7	35	20	100
Epping	1	25	2	50	-	-	-	-	-	-	-	-	1	25	4	100
Ongar	1	14	2	29	1	14	-	-	-	-	-	-	3	43	7	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
North Weald	3	38	1	13	-	-	1	13	1	13	1	13	1	13	8	100
Rural South	1	20	1	20	1	20	-	-	-	-	-	-	2	40	5	100
Total	9	15	22	37	4	7	3	5	1	2	3	5	18	30	60	100

Base: 60 respondents

Question B3: Roughly How much floorspace do your premises occupy?

Table 1.16 – Size of Premises (Epping Forest District)

	0 - 100 sqm		101 – 250 sqm		250 – 500 sqm		501 – 1000 sqm		1000 + sqm		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector												
Banking, Finance & Insurance	9	28	5	16	1	3	2	6	2	6	19	59
Construction	5	21	2	9	-	-	1	4	2	8	10	43
Distribution & Wholesale	1	3	2	6	4	13	3	9	6	19	16	50
Manufacturing	5	21	5	21	2	8	2	8	5	21	19	79
Other Services	1	25	-	-	-	-	-	-	-	-	1	25
Transport & Communications	4	40	1	10	-	-	-	-	-	-	5	50
Total	25	20	15	12	7	6	8	6	15	12	70	56
By Size												
Micro (1 - 4)	16	34	8	17	-	-	2	4	-	-	26	55
Small (5 – 10)	4	22	3	17	2	11	-	-	2	11	11	61
Medium (11 – 24)	1	4	2	8	4	15	3	12	5	19	15	58

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	0 - 100 sqm		101 – 250 sqm		250 – 500 sqm		501 – 1000 sqm		1000 + sqm		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Medium (25 – 49)	2	11	2	11	1	6	2	11	3	17	10	56
Medium (50 – 99)	-	-	-	-	-	-	-	-	3	50	3	50
Large (100 – 199)	2	33	-	-	-	-	1	17	-	-	3	50
Large (200 +)	-	-	-	-	-	-	-	-	2	50	2	50
Total	25	20	15	12	7	6	8	6	15	12	70	56
By Location												
Waltham Abbey	4	15	4	15	1	4	2	8	2	8	13	50
Nazeing	1	11	1	11	-	-	2	22	2	22	6	67
Loughton	12	28	4	9	2	5	1	2	6	14	25	58
Epping	1	11	1	11	-	-	2	22	-	-	4	44
Ongar	3	18	1	6	-	-	1	6	2	12	7	41
North Weald	2	15	1	8	3	23	-	-	2	15	8	62
Rural South	2	25	3	38	1	13	-	-	1	13	7	88
Total	25	20	15	12	7	6	8	6	15	12	70	56

Base: 70 respondents

Table 1.17 – Average Size of Premises (Epping Forest District)

	Number Respondents	Average size (sqm)
By Sector		
Banking, Finance & Insurance	19	509
Construction	10	794
Distribution & Wholesale	16	2340
Manufacturing	19	1345
Other Services	1	100
Transport & Communications	5	74
Total	70	1158
By Size		
Micro (1 - 4)	26	143
Small (5 – 10)	11	664
Medium (11 – 24)	15	1859
Medium (25 – 49)	10	1927
Medium (50 – 99)	3	4911
Large (100 – 199)	3	250
Large (200 +)	2	3716
Total	70	1158
By Location		
Waltham Abbey	13	989
Nazeing	6	3106
Loughton	25	965
Epping	4	410
Ongar	7	635
North Weald	8	1784
Rural South	7	727
Total	70	1158

Question B4: How suitable is your current premises / location for your business?**Table 1.18 – Suitability of current business premises (Epping Forest District)**

	Very Suitable		Reasonably Suitable		Unsuitable		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	22	69	9	28	1	3	32	100
Construction	19	83	4	17	-	-	23	100
Distribution & Wholesale	21	66	10	31	1	3	32	100
Manufacturing	13	54	11	46	-	-	24	100
Other Services	4	100	-	-	-	-	4	100
Transport & Communications	10	100	-	-	-	-	10	100
Total	89	71	34	27	2	2	125	100
By Size								
Micro (1 - 4)	36	77	11	23	-	-	47	100
Small (5 – 10)	12	67	5	28	1	6	18	100
Medium (11 – 24)	14	54	12	46	-	-	26	100
Medium (25 – 49)	13	72	4	22	1	6	18	100
Medium (50 – 99)	5	83	1	17	-	-	6	100
Large (100 – 199)	5	83	1	17	-	-	6	100
Large (200 +)	4	100	-	-	-	-	4	100
Total	89	71	34	27	2	2	125	100
By Location								
Waltham Abbey	17	65	9	35	-	-	26	100
Nazeing	7	78	2	22	-	-	9	100
Loughton	32	74	9	21	2	5	43	100
Epping	6	67	3	33	-	-	9	100
Ongar	13	76	4	23	-	-	17	100
North Weald	10	77	3	23	-	-	13	100
Rural South	4	50	4	50	-	-	8	100
Total	89	71	34	27	2	2	125	100

Question B5: What are the main factors contributing to unsuitability of premises?**Table 1.19 – Factors Contributing to unsuitability of premises (Epping Forest District)**

Factor	Waltham Abbey		Nazeing		Loughton		Epping		Ongar		North Weald		Rural South		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Site / premises too small	4	44	1	50	4	36	1	33	1	25	-	-	2	50	13	36
Lack of car parking	-	-	-	-	4	36	2	67	1	25	-	-	-	-	7	19
High business rates	-	-	1	50	3	27	1	33	-	-	-	-	1	25	6	16
Premises too old / in poor condition	1	11	-	-	1	9	1	33	-	-	1	33	1	25	5	14
High rents	-	-	1	50	2	18	1	33	-	-	-	-	-	-	4	11
Poor site access	-	-	-	-	1	50	1	9	-	-	1	25	-	-	3	8
Poor Location	2	22	-	-	-	-	-	-	1	25	-	-	-	-	3	8
No particular reason	-	-	-	-	-	-	1	9	-	-	1	25	1	33	3	8
Road congestion	-	-	1	50	1	9	-	-	-	-	-	-	-	-	2	6
Poor local facilities / amenities	1	11	-	-	-	-	1	33	-	-	-	-	-	-	2	6
Poor public transport	-	-	-	-	-	-	-	-	-	-	-	-	1	3	1	3
Poor image of site / premises	1	11	-	-	-	-	-	-	-	-	-	-	-	-	1	3
Site too big	1	11	-	-	-	-	-	-	-	-	-	-	-	-	1	3
Site too small	1	11	-	-	-	-	-	-	-	-	-	-	-	-	1	3
Total	9	25	2	6	11	31	3	8	4	11	3	8	4	11	36	100

Base: 36 respondents

Question B6: What are your companies top priority for future infrastructure investment?**Table 1.20 – Future infrastructure investment priorities (Epping Forest District)**

Factor	Waltham Abbey		Nazeing		Loughton		Epping		Ongar		North Weald		Rural South		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Transport	2	8	3	33	7	16	2	22	3	18	1	8	2	25	20	16
ICT / Broadband in your locality	3	12	1	11	7	16	-	-	1	6	2	15	1	13	15	20
Property / Develop present premises	3	12	1	11	4	9	-	-	2	12	1	8	-	-	11	9
Machinery	2	8	1	11	5	12	-	-	1	6	2	15	-	-	11	9
Advertising / Marketing / getting more customers	2	8	-	-	1	2	3	33	-	-	1	8	1	13	8	6
Training	1	4	-	-	3	7	1	11	-	-	2	15	-	-	7	6
Energy Supply	-	-	1	11	1	2	-	-	1	6	1	8	-	-	4	3
Recruitment	1	4	-	-	3	7	-	-	-	-	-	-	-	-	4	3
Staying in Business	-	-	-	-	1	2	-	-	2	11	-	-	1	13	4	3
Developing the business / growing the business	1	4	-	-	2	5	-	-	-	-	-	-	-	-	3	2
Recycling / environment	-	-	-	-	-	-	-	-	1	6	-	-	-	-	1	1
Expansion / acquisition	-	-	-	-	1	2	-	-	-	-	-	-	-	-	1	1
New Products / R & D	-	-	-	-	-	-	-	-	-	-	-	-	1	8	1	1
Disabled Access	1	4	-	-	-	-	-	-	-	-	-	-	-	-	1	1

Factor	Waltham Abbey		Nazeing		Loughton		Epping		Ongar		North Weald		Rural South		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Energy Supply	-	-	-	-	-	-	-	-	-	-	1	6	-	-	1	1
Local road improvements	-	-	-	-	-	-	-	-	-	-	1	6	-	-	1	1
None	6	23	1	11	4	9	1	11	3	18	1	8	2	25	18	14
Don't Know	4	15	1	11	4	9	2	22	1	6	1	8	1	13	14	11
Total	26	21	9	7	43	34	9	7	17	14	13	10	8	6	125	100

Question B7: Are you planning to expand the business in the next 5 years?**Table 1.21 – Planning to expand (Epping Forest District)**

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	13	41	18	56	1	3	32	100
Construction	10	44	13	56	-	-	23	100
Distribution & Wholesale	14	43	17	53	1	3	32	100
Manufacturing	8	33	13	54	3	13	24	100
Other Services	3	75	1	25	-	-	4	100
Transport & Communications	5	50	5	50	-	-	10	100
Total	53	42	67	53	5	4	125	100
By Size								
Micro (1 - 4)	15	32	28	60	4	-	47	100
Small (5 – 10)	7	39	11	61	-	-	18	100
Medium (11 – 24)	12	46	14	54	-	-	26	100
Medium (25 – 49)	7	39	10	56	1	6	18	100
Medium (50 – 99)	4	67	2	33	-	-	6	100
Large (100 – 199)	5	83	1	17	-	-	6	100
Large (200 +)	3	75	1	25	-	-	4	100
Total	53	42	67	53	5	4	125	100
By Location								
Waltham Abbey	9	35	14	53	3	12	26	100
Nazeing	2	22	7	78	-	-	9	100
Loughton	19	44	23	53	1	11	43	100
Epping	5	56	3	33	1	11	9	100
Ongar	11	65	6	35	-	-	17	100
North Weald	7	54	6	46	-	-	13	100
Rural South	-	-	8	100	-	-	8	100
Total	53	42	67	53	5	4	125	100

Question B8: Will this expansion lead to a need for additional floor space?**Table 1.22 – Need for additional floor space (Epping Forest District)**

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	8	62	4	31	1	8	13	100
Construction	2	20	6	60	2	20	10	100
Distribution & Wholesale	6	43	7	50	1	7	14	100
Manufacturing	3	38	4	50	1	13	8	100
Other Services	-	-	3	100	-	-	3	100
Transport & Communications	4	80	1	20	-	-	5	100
Total	23	43	25	47	5	9	53	100
By Size								
Micro (1 - 4)	5	33	7	47	3	20	15	100
Small (5 – 10)	1	14	5	71	1	14	7	100
Medium (11 – 24)	5	42	7	58	-	-	12	100
Medium (25 – 49)	4	57	2	29	1	14	7	100
Medium (50 – 99)	4	100	-	-	-	-	4	100
Large (100 – 199)	2	40	3	60	-	-	5	100
Large (200 +)	2	67	1	33	-	-	3	100
Total	23	43	25	47	5	9	53	100
By Location								
Waltham Abbey	4	44	2	22	3	33	9	100
Nazeing	1	50	1	50	-	-	2	100
Loughton	9	47	10	53	-	-	19	100
Epping	3	60	1	20	1	20	5	100
Ongar	4	36	7	64	-	-	11	100
North Weald	2	29	4	57	1	14	7	100
Rural South	-	-	-	-	-	-	-	100
Total	23	43	25	47	5	9	53	100

Base: 53 respondents

Question B9: Roughly how much additional floor space do you think you will need?

(This question was only asked to those respondents who said in question B8 that their expansion would require additional floorspace)

Only a small proportion of respondents were able to estimate the amount of additional floorspace that they were likely to need. It is therefore not considered appropriate to analyse by industry, business or location.

23 respondents gave estimates equating to an average requirement of 1,501 square metres.

Question B10. Could this additional floorspace be provided on your current site through the following measures?

Table 1.23 – Measures for providing additional floorspace (Epping Forest District)

	Extension		Refurbishment		Redevelopment		More Intensive use of existing space		None of these		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector												
Banking, Finance & Insurance	2	25	-	-	-	-	-	-	6	75	8	100
Construction	1	50	-	-	-	-	-	-	1	50	2	100
Distribution & Wholesale	-	-	-	-	-	-	-	-	6	100	6	100
Manufacturing	-	-	-	-	-	-	-	-	3	100	3	100
Other Services	-	-	-	-	-	-	-	-	-	-	-	-
Transport & Communications	1	14	1	14	1	14	1	14	3	43	7	100
Total	4	17	1	4	1	4	1	4	19	83	26	100
By Size												
Micro (1 - 4)	1	10	1	10	1	10	1	10	4	60	8	100
Small (5 – 10)	-	-	-	-	-	-	-	-	1	100	1	100
Medium (11 – 24)	-	-	-	-	-	-	-	-	5	100	5	100
Medium (25 – 49)	-	-	-	-	-	-	-	-	4	100	4	100
Medium (50 – 99)	-	-	-	-	-	-	-	-	4	100	4	100
Large (100 – 199)	1	50	-	-	-	-	-	-	1	50	2	100
Large (200 +)	2	100	-	-	-	-	-	-	-	-	2	100
Total	4	17	1	4	1	4	1	4	19	83	26	100

	Extension		Refurbishment		Redevelopment		More Intensive use of existing space		None of these		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Location												
Waltham Abbey	1	25	-	-	-	-	-	-	3	75	4	100
Nazeing	-	-	-	-	-	-	-	-	1	100	1	100
Loughton	3	33	1	11	1	11	1	11	6	67	12	100
Epping	-	-	-	-	-	-	-	-	3	100	3	100
Ongar	-	-	-	-	-	-	-	-	4	100	4	100
North Weald	-	-	-	-	-	-	-	-	2	100	2	100
Rural South	-	-	-	-	-	-	-	-	-	-	-	-
Total	4	17	1	4	1	4	1	4	19	83	26	100

Base: 26 Respondents

Question B11. Will this downsizing lead to a need for a reduction in floor space?

Table 1.24 – Need for additional floor space (Epping Forest District)

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	-	-	1	100	-	-	1	100
Construction	-	-	-	-	-	-	-	-
Distribution & Wholesale	-	-	1	100	-	-	1	100
Manufacturing	1	33	2	67	-	-	3	100
Other Services	-	-	-	-	-	-	-	-
Transport & Communications	-	-	-	-	-	-	-	-
Total	1	20	4	80	-	-	5	100
By Size								
Micro (1 - 4)	1	25	3	75	-	-	4	100
Small (5 – 10)	-	-	-	-	-	-	-	-
Medium (11 – 24)	-	-	-	-	-	-	-	-
Medium (25 – 49)	-	-	1	100	-	-	-	-
Medium (50 – 99)	-	-	-	-	-	-	-	-
Large (100 – 199)	-	-	-	-	-	-	-	-
Large (200 +)	-	-	-	-	-	-	-	-
Total	1	20	4	80	-	-	5	100
By Location								
Waltham Abbey	1	33	2	67	-	-	3	100
Nazeing	-	-	-	-	-	-	-	-
Loughton	-	-	1	100	-	-	1	100
Epping	-	-	1	100	-	-	1	100
Ongar	-	-	-	-	-	-	-	-
North Weald	-	-	-	-	-	-	-	-
Rural South	-	-	-	-	-	-	-	-
Total	1	20	4	80	-	-	5	100

Base: 5 Respondents

Question B12: Roughly how much less floor space do you think you will need

There was only one response to this question.

Question B13. What are the reasons for downsizing

Only 5 businesses were planning to downsize and the reasons for downsizing two reasons were given for downsizing, imminent retirement and reduced market demand.

Question B14. Have you considered relocating from your current premises?**Table 1.25 – Considered relocating (Epping Forest District)**

	Yes		No		Total	
	No.	%	No.	%	No.	%
By Sector						
Banking, Finance & Insurance	6	19	26	81	32	100
Construction	3	13	20	87	23	100
Distribution & Wholesale	7	22	25	78	32	100
Manufacturing	7	29	17	71	24	100
Other Services	1	25	3	75	4	100
Transport & Communications	3	30	7	10	10	100
Total	27	22	98	78	125	100
By Size						
Micro (1 - 4)	12	26	35	74	47	100
Small (5 – 10)	4	22	14	78	18	100
Medium (11 – 24)	6	23	20	77	26	100
Medium (25 – 49)	3	17	15	83	18	100
Medium (50 – 99)	1	17	5	83	6	100
Large (100 – 199)	1	17	5	83	6	100
Large (200 +)	-	-	4	100	4	100
Total						
By Location						
Waltham Abbey	8	31	18	69	26	100
Nazeing	2	22	7	78	9	100
Loughton	9	21	34	79	43	100
Epping	2	22	7	78	9	100
Ongar	3	18	14	82	17	100
North Weald	3	23	10	77	13	100
Rural South	-	-	8	100	8	100
Total	27	22	98	78	125	100

Question B15: To which of the following locations have you considered relocating?**Table 1.26 – Location of considered (Epping Forest District)**

	Epping Forest		Herts		Rest of Essex		London		Rest South East		UK		International		Brentwood		Others		Total	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
By Sector																				
Banking, Finance & Insurance	3	42	2	29	-	-	1	14	1	14	-	-	-	-	-	-	-	-	7	100
Construction	2	40	2	40	1	20	-	-	-	-	-	-	-	-	-	-	-	-	5	100
Distribution & Wholesale	6	75	1	13	1	13	-	-	-	-	-	-	-	-	-	-	-	-	8	100
Manufacturing	1	11	2	22	2	22	-	-	-	-	1	11	1	11	-	-	2	22	9	100
Other Services	1	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	100
Transport & Communications	-	-	1	33	2	67	-	-	-	-	-	-	-	-	-	-	-	-	3	100
Total	13	39	8	24	6	18	1	3	1	3	1	3	1	3	-	-	2	7	33	100
By Size																				
Micro (1 - 4)	5	31	5	31	4	25	-	-	-	-	1	6	1	6	-	-	-	-	16	100
Small (5 – 10)	2	40	1	20	1	20	-	-	1	20	-	-	-	-	-	-	-	-	5	100
Medium (11 – 24)	2	33	1	17	1	17	-	-	-	-	-	-	-	-	-	-	2	33	6	100
Medium (25 – 49)	2	50	1	25	-	-	1	25	-	-	-	-	-	-	-	-	-	-	4	100
Medium (50 – 99)	1	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	100
Large (100 – 199)	1	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	100
Large (200 +)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

	Epping Forest		Herts		Rest of Essex		London		Rest South East		UK		International		Brentwood		Others		Total	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Total	13	39	8	24	6	18	1	3	1	3	1	3	1	3	-	-	2	7	33	100
By Location																				
Waltham Abbey	3	30	5	50	1	10	-	-	-	-	-	-	1	10	-	-	-	-	10	100
Nazeing	-	-	1	33	-	-	-	-	1	33	-	-	-	-	-	-	1	33	3	100
Loughton	7	58	2	16	1	8	1	8	-	-	1	8	-	-	-	-	-	-	12	100
Epping	1	50	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	50	2	100
Ongar	2	67	-	-	1	33	-	-	-	-	-	-	-	-	-	-	-	-	3	100
North Weald	-	-	-	-	3	100	-	-	-	-	-	-	-	-	-	-	-	-	3	100
Rural South	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total	13	39	8	24	6	18	1	3	1	3	1	3	1	3	-	-	2	7	33	100

Base: 33 respondents

Question B16: Preferred locations for those wanting to relocate

Only 13 respondents all stating different preferred locations with 5 stating don't know.

Question B17: To what type of location would you prefer to relocate?**Table 1.27 – Preferred location type for relocation (Epping Forest District)**

	Dedicated industrial area		Town centre / commercial district		Mixed use area		Rural area		Somewhere high profile		Other		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No	%
By Sector														
Banking, Finance & Insurance	-	-	2	67	-	-	-	-	1	33	-	-	3	100
Construction	-	-	1	50	1	50	-	-	-	-	-	-	2	100
Distribution & Wholesale	3	50	-	-	2	33	-	-	1	17	-	-	6	100
Manufacturing	1	100	-	-	-	-	-	-	-	-	-	-	1	100
Other Services	-	-	1	100	-	-	-	-	-	-	-	-	1	100
Transport & Communications	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total	4	31	4	31	3	23	1	8	1	8	-	-	13	100
By Size														
Micro (1 - 4)	2	40	1	20	1	20	1	20	-	-	-	-	5	100
Small (5 – 10)	1	50	1	50	-	-	-	-	-	-	-	-	2	100
Medium (11 – 24)	1	50	1	50	-	-	-	-	-	-	-	-	2	100
Medium (25 – 49)	-	-	-	-	1	50	-	-	1	50	-	-	2	100
Medium (50 – 99)	-	-	-	-	1	100	-	-	-	-	-	-	1	100
Large (100 – 199)	-	-	1	100	-	-	-	-	-	-	-	-	1	100
Large (200 +)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total	4	31	4	31	3	23	1	8	1	8	-	-	13	100

	Dedicated industrial area		Town centre / commercial district		Mixed use area		Rural area		Somewhere high profile		Other		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No	%
By Location														
Waltham Abbey	1	33	-	-	2	67	-	-	-	-	-	-	3	100
Nazeing	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Loughton	1	14	4	57	1	14	-	-	1	14	-	-	7	100
Epping	-	-	-	-	-	-	1	14	-	-	-	-	1	100
Ongar	2	100	-	-	-	-	-	-	-	-	-	-	2	100
North Weald	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Rural South	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total	4	31	4	31	3	23	1	8	1	8	-	-	13	100

Base: 13 respondents

Question B18. Is this type of premises available in Epping?**Table 1.28 – Preferred premises type available in Epping Forest District**

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	3	100	-	-	-	-	3	100
Construction	1	50	-	-	1	50	2	100
Distribution & Wholesale	3	50	1	17	2	33	6	100
Manufacturing	1	100	-	-	-	-	1	100
Other Services	1	100	-	-	-	-	1	100
Transport & Communications	-	-	-	-	-	-	-	-
Total	9	69	1	8	3	23	13	100
By Size								
Micro (1 - 4)	3	60	-	-	2	40	5	100
Small (5 – 10)	2	100	-	-	-	-	2	100
Medium (11 – 24)	2	100	-	-	-	-	2	100
Medium (25 – 49)	-	-	1	50	1	50	2	100
Medium (50 – 99)	1	100	-	-	-	-	1	100
Large (100 – 199)	1	100	-	-	-	-	1	100
Large (200 +)	-	-	-	-	-	-	-	-
Total	9	69	1	8	3	23	13	100
By Location								
Waltham Abbey	1	33	-	-	2	67	3	100
Nazeing	-	-	-	-	-	-	-	-
Loughton	6	86	1	14	-	-	7	100
Epping	1	100	-	-	-	-	1	100
Ongar	1	50	-	-	1	50	2	100
North Weald	-	-	-	-	-	-	-	-
Rural South	-	-	-	-	-	-	-	-
Total	9	69	1	8	3	23	13	100

Base: 13 respondents

Question B19. Do you consider the current location of your business to be a good and competitive location?

Table 1.29 – Good and Competitive Location (Epping Forest District)

	Yes		No		Total	
	No.	%	No.	%	No.	%
By Sector						100
Banking, Finance & Insurance	29	91	3	9	32	100
Construction	21	91	2	9	23	100
Distribution & Wholesale	29	91	3	9	32	100
Manufacturing	22	92	2	8	24	100
Other Services	4	100	-	-	4	100
Transport & Communications	10	100	-	-	10	100
Total	115	92	10	8	125	100
By Size						
Micro (1 - 4)	42	89	5	11	47	100
Small (5 – 10)	16	89	2	11	18	100
Medium (11 – 24)	24	92	2	8	26	100
Medium (25 – 49)	17	94	1	6	18	100
Medium (50 – 99)	6	100	-	-	6	100
Large (100 – 199)	6	100	-	-	6	100
Large (200 +)	4	100	-	-	4	100
Total	115	92	10	8	125	100
By Location						
Waltham Abbey	21	81	5	19	26	100
Nazeing	9	100	-	-	9	100
Loughton	41	95	2	5	41	100
Epping	9	100	-	-	9	100
Ongar	15	88	2	12	15	100
North Weald	12	92	1	8	13	100
Rural South	8	100	-	-	8	100
Total	115	92	10	8	125	100

Question B20: Why do you consider it a good and competitive location?

(respondents can give more than one reason and therefore totals do not add to base total)

Table 1.30 – Reasons current location is good (Epping Forest District)

Factor	Waltham Abbey		Nazeing		Loughton		Epping		Ongar		North Weald		Rural South		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Access to road network	12	57	4	44	22	54	2	22	8	53	8	67	5	62	61	53
Proximity to key clients / markets	7	33	3	33	16	39	6	67	7	47	3	25	2	25	44	38
Appropriate type of premises	4	19	4	44	8	19	2	22	4	27	3	25	3	36	28	24
Access to rail network	2	10	-	-	13	32	1	11	1	7	2	17	1	13	20	17
Affordable premises	4	19	-	-	3	7	2	22	4	27	2	17	1	13	16	14
Good environment / quality of life	2	10	1	11	4	10	1	11	2	13	2	17	-	-	12	10
Close to home	3	14	2	22	3	7	2	22	-	-	1	8	-	-	11	10
Proximity to key suppliers	-	-	2	22	5	12	-	-	1	7	-	-	1	13	9	8
Proximity to skilled workforce	2	10	1	11	3	7	-	-	1	7	-	-	-	-	7	6
Good car parking	-	-	-	-	2	5	-	-	-	-	-	-	-	-	2	2
Location not relevant to their business	-	-	-	-	1	2	-	-	-	-	1	8	-	-	2	2
other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total	21	18	9	8	41	36	9	8	15	13	12	10	8	7	115	100

Base: 115 respondents

Question B21: Why do you not consider your current location a good and competitive location?

There were only 10 respondents to this question the most common reasons given for Epping Forest District not being a good location were poor accessibility (40%), lack of suitable sites and premises (30%) and poor environment / quality of life (30%),

Full Business Survey Results: Tables (Brentwood Borough)

A: Business

Question A2: Approximately how many people do you employ?

Table 1.31 – Average Number of Employees (Brentwood Borough)

	Average no. employees	No. Respondents
By Sector		
Banking, Finance & Insurance	26	40
Construction	10	28
Distribution & Wholesale	17	27
Manufacturing	9	16
Other Services	2	2
Transport & Communications	23	12
Total	17	125
By Size		
Micro (1 - 4)	1	50
Small (5 – 10)	7	27
Medium (11 – 24)	15	24
Medium (25 – 49)	32	32
Medium (50 – 99)	55	55
Large (100 – 199)	126	6
Large (200 +)	200	1
Total	17	125
By Location		
Brentwood	15	57
Ingatestone	10	12
Rural North	19	14
Rural South	37	25
Total	17	125

Question A3: What Proportion of your employees come from the following distances?

Table 1.32 – Travel to Work Distance (Brentwood Borough)

	Average proportion of employees (%)				
	0-4 miles	5-10 miles	11 – 15 miles	16 – 20 miles	20 + miles
By Sector					
Banking, Finance & Insurance	42	29	13	9	7
Construction	58	16	15	2	8
Distribution & Wholesale	51	18	20	5	5
Manufacturing	53	25	17	-	5
Other Services	100	-	-	-	-
Transport & Communications	36	12	20	10	22
Total	49	21	16	5	8
By Size					
Micro (1 - 4)	73	15	9	-	3
Small (5 – 10)	47	22	16	6	8
Medium (11 – 24)	22	28	28	8	15
Medium (25 – 49)	27	27	24	8	14
Medium (50 – 99)	48	13	10	26	2
Large (100 – 199)	19	30	18	19	15
Large (200 +)	100	-	-	-	-
Total	49	21	16	5	8
By Location					
Brentwood	55	20	15	4	5
Ingatestone	45	23	15	10	6
Rural North	57	16	15	6	7
Rural South	38	24	19	5	13
Total	49	21	16	5	8

Question A4: What proportion of your employees travel by the following modes of transport?

Table 1.33 – Travel to work Mode (Brentwood Borough)

	Average proportion of employees (%)				
	Car	Bus	Train	Walk	Cycle
By Sector					
Banking, Finance & Insurance	76	1	12	11	-
Construction	84	-	6	9	1
Distribution & Wholesale	81	3	4	10	2
Manufacturing	72	7	5	14	2
Other Services	100	-	-	-	-
Transport & Communications	91	-	-	9	-
Total	80	2	7	10	1
By Size					
Micro (1 - 4)	78	-	1	22	-
Small (5 – 10)	78	4	10	6	2
Medium (11 – 24)	85	1	12	1	1
Medium (25 – 49)	84	3	11	1	-
Medium (50 – 99)	86	10	-	1	3
Large (100 – 199)	80	4	13	2	-
Large (200 +)	50	-	-	25	25
Total	80	2	7	10	1
By Location					
Brentwood	68	4	11	16	1
Ingatestone	88	-	2	9	1
Rural North	87	2	-	11	-
Rural South	92	-	4	2	1
Total	80	2	7	10	1

Question A5: What proportion of your main customers come from the follow locations?**Table 1.34 – Location of main Customers (Brentwood Borough)**

	Epping Forest	Brent wood	Rest of Essex	London	Herts	Rest South East	Rest UK	Internat ional
By Sector								
Banking, Finance & Insurance	2	29	23	19	2	5	14	5
Construction	5	32	25	20	1	8	10	-
Distribution & Wholesale	8	30	21	7	1	9	18	5
Manufacturing	4	18	12	27	2	10	16	11
Other Services	18	30	28	25	-	-	-	-
Transport & Communications	1	36	14	21	1	12	4	11
Total	4	29	21	18	1	8	13	5
By Size								
Micro (1 - 4)	5	41	22	12	1	2	13	4
Small (5 – 10)	4	29	21	22	2	11	5	4
Medium (11 – 24)	2	13	23	24	1	11	15	11
Medium (25 – 49)	8	15	21	25	1	11	18	-
Medium (50 – 99)	3	3	10	12	2	38	22	10
Large (100 – 199)	1	29	16	24	3	11	14	4
Large (200 +)	-	-	-	-	-	-	-	-
Total	4	29	21	18	1	8	13	5
By Location								
Brentwood	4	40	18	20	1	3	7	7
Ingatestone	3	6	24	13	1	12	28	12
Rural North	10	40	26	12	1	4	5	2
Rural South	1	11	23	20	2	17	24	2
Total	4	29	21	18	1	8	13	5

Base: 106 respondents

Question A6: How long has your operation been established in Brentwood?**Table 1.35 - Length of time in Brentwood Borough**

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Banking, Finance & Insurance	1	3	10	25	10	25	6	15	5	13	8	20	-	-	40	100
Construction	2	7	10	36	5	18	5	18	1	4	5	18	-	-	28	100
Distribution & Wholesale	1	4	8	30	2	7	5	19	1	4	9	33	1	4	27	100
Manufacturing	-	-	5	31	4	25	2	13	2	13	3	19	-	-	16	100
Other Services	1	50	1	50	-	-	-	-	-	-	-	-	-	-	2	100
Transport & Communications	1	8	3	25	2	18	3	25	-	-	3	25	-	-	12	100
Total	6	5	37	30	23	18	21	17	9	7	28	22	1	1	125	100
By Size																
Micro (1 - 4)	4	8	18	36	11	22	9	18	1	2	7	14	-	-	50	100
Small (5 – 10)	-	-	5	19	4	15	4	15	2	7	12	44	-	-	27	100
Medium (11 – 24)	2	8	6	25	5	21	3	13	2	8	5	21	1	4	24	100
Medium (25 – 49)	-	-	6	43	1	7	3	21	1	7	3	21	-	-	14	100
Medium (50 – 99)	-	-	-	-	1	33	1	33	-	-	1	33	-	-	3	100
Large (100 – 199)	-	-	2	33	1	17	-	-	3	50	-	-	-	-	6	100
Large (200 +)	-	-	-	-	-	-	1	100	-	-	-	-	-	-	1	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Total	6	5	37	30	23	18	21	17	9	7	28	22	1	1	125	100
By Location																
Brentwood	4	7	15	26	12	21	10	18	3	5	13	23	-	-	57	100
Ingatestone	-	-	5	42	2	17	2	17	1	8	2	17	-	-	12	100
Rural North	1	5	5	26	4	21	2	11	1	5	5	26	1	5	19	100
Rural South	1	3	12	32	5	14	7	19	4	11	8	22	-	-	37	100
Total	6	5	37	30	23	18	21	17	9	7	28	22	1	1	125	100

B: Premises

Question B1: How long has business operated out of the premises which you currently occupy?

Table 1.36 – Length of time in current premises (Brentwood Borough)

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Banking, Finance & Insurance	7	18	10	25	14	35	4	10	-	-	5	13	-	-	40	100
Construction	2	7	12	43	6	21	5	18	1	4	2	7	-	-	28	100
Distribution &	2	7	6	22	4	15	5	19	-	-	9	33	1	4	27	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Wholesale																
Manufacturing	-	-	8	50	5	31	1	6	-	-	2	13	-	-	16	100
Other Services	1	50	1	50	-	-	-	-	-	-	-	-	-	-	2	100
Transport & Communications	1	8	5	42	2	17	2	17	-	-	2	17	-	-	12	100
Total	13	10	42	34	31	25	17	14	1	1	20	16	1	1	125	100
By Size																
Micro (1 - 4)	7	14	16	32	12	24	9	18	1	2	5	10	-	-	50	100
Small (5 – 10)	2	7	8	30	6	22	2	7	-	-	9	33	-	-	27	100
Medium (11 – 24)	2	8	9	38	7	29	3	13	-	-	2	8	1	4	24	100
Medium (25 – 49)	1	7	7	50	2	14	1	7	-	-	3	21	-	-	14	100
Medium (50 – 99)	-	-	-	-	1	33	1	33	-	-	1	33	-	-	3	100
Large (100 – 199)	1	17	2	33	3	50	-	-	-	-	-	-	-	-	6	100
Large (200 +)	-	-	-	-	-	-	1	100	-	-	-	-	-	-	1	100
Total	13	10	42	34	31	25	17	14	1	1	20	16	1	1	125	100
By Location																
Brentwood	6	11	18	32	18	32	7	12	-	-	8	14	-	-	57	100
Ingatestone	1	8	5	42	3	25	2	17	-	-	1	8	-	-	12	100
Rural North	3	16	6	32	2	11	3	16	1	5	3	16	1	5	19	100
Rural South	3	8	13	35	8	22	5	14	-	-	8	22	-	-	37	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Total	13	10	42	34	31	25	17	14	1	1	20	16	1	1	125	100

Question B2: By What tenure do you occupy your premises?

Table 1.37 – Tenure of premises (Brentwood Borough)

	Freehold		Leasehold		License		Work from Home		Mobile Working		Other		Don't know / no response		Rented		Tot al	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																		
Banking, Finance & Insurance	6	15	21	52	3	8	6	15	-	-	-	-	-	-	4	10	40	100
Construction	7	25	8	29	-	-	5	18	5	18	-	-	1	4	2	7	28	100
Distribution & Wholesale	7	26	10	37	1	4	1	4	1	4	1	4	1	4	5	19	27	100
Manufacturing	4	25	8	50	1	6	1	6	-	-	-	-	1	6	1	6	16	100
Other Services	-	-	-	-	-	-	1	50	1	50	-	-	-	-	-	-	2	100
Transport & Communications	2	17	7	58	-	-	1	8	-	-	-	-	1	8	1	8	12	100
Total	26	21	54	43	5	4	15	12	7	6	1	1	4	3	13	10	125	100
By Size																		
Micro (1 - 4)	10	20	11	22	3	6	12	24	7	14	-	-	-	-	7	14	50	100
Small (5 – 10)	7	26	8	30	2	7	3	11	-	-	1	4	3	11	3	11	27	100

	Freehold		Leasehold		License		Work from Home		Mobile Working		Other		Don't know / no response		Rented		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Medium (11 – 24)	5	21	16	67	-	-	-	-	-	-	-	-	1	4	2	8	24	100
Medium (25 – 49)	2	14	11	79	-	-	-	-	-	-	-	-	-	-	1	7	14	100
Medium (50 – 99)	2	67	1	33	-	-	-	-	-	-	-	-	-	-	-	-	3	100
Large (100 – 199)	-	-	6	100	-	-	-	-	-	-	-	-	-	-	-	-	6	100
Large (200 +)	-	-	1	100	-	-	-	-	-	-	-	-	-	-	-	-	1	100
Total	26	21	54	43	5	4	15	12	7	6	1	1	4	3	13	10	125	100
By Location																		
Brentwood	13	23	24	42	3	5	7	12	3	5	-	-	2	4	5	9	57	100
Ingatestone	3	25	4	33	1	8	1	8	-	-	-	-	-	-	3	25	12	100
Rural North	5	26	7	37	-	-	5	26	2	11	-	-	-	-	-	-	19	100
Rural South	5	14	19	51	1	3	2	5	2	5	1	3	2	5	5	14	37	100
Total	26	21	54	43	5	4	15	12	7	6	1	1	4	3	13	10	125	100

Question B2ii): For those that answered leasehold above what is the remaining length of lease?**Table 1.38 – Length of lease remaining (Brentwood Borough)**

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Banking, Finance & Insurance	2	10	8	38	3	14	-	-	-	-	-	-	8	38	21	100
Construction	1	13	4	50	3	38	-	-	-	-	-	-	-	-	8	100
Distribution & Wholesale	-	-	3	30	2	20	-	-	-	-	2	20	3	30	10	100
Manufacturing	1	13	5	63	-	-	-	-	-	-	-	-	2	25	8	100
Other Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Transport & Communications	1	14	3	43	1	14	-	-	1	14	-	-	1	14	7	100
Total	5	9	23	43	9	17	-	-	1	2	2	4	14	26	54	100
By Size																
Micro (1 - 4)	2	18	3	27	2	18	-	-	-	-	1	9	3	27	11	100
Small (5 – 10)	1	13	2	25	-	-	-	-	-	-	1	13	4	50	8	100
Medium (11 – 24)	1	6	10	63	2	13	-	-	1	6	-	-	2	13	16	100
Medium (25 – 49)	1	9	5	45	5	45	-	-	-	-	-	-	-	-	11	100
Medium (50 – 99)	-	-	-	-	-	-	-	-	-	-	-	-	1	100	1	100

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Large (100 – 199)	-	-	3	50	-	-	-	-	-	-	-	-	3	50	6	100
Large (200 +)	-	-	-	-	-	-	-	-	-	-	-	-	1	100	1	100
Total	5	9	23	43	9	17	-	-	1	2	2	4	14	26	54	100
By Location																
Brentwood	2	8	11	46	4	17	-	-	1	4	1	4	5	21	24	100
Ingatestone	-	-	1	25	1	25	-	-	-	-	-	-	2	50	4	100
Rural North	-	-	1	14	-	-	-	-	-	-	-	-	6	86	7	100
Rural South	3	16	10	53	4	21	-	-	-	-	1	5	1	5	19	100
Total	5	9	23	43	9	17	-	-	1	2	2	4	14	26	54	100

Base: 54 respondents

Question B3: Roughly How much floorspace do your premises occupy?

Table 1.39 – Size of Premises (Brentwood Borough)

	0 - 100 sqm		101 – 250 sqm		251 – 500 sqm		501 – 1000 sqm		1000 + sqm		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector												
Banking, Finance & Insurance	12	30	4	10	2	5	1	3	1	3	20	50
Construction	7	25	2	7	-	-	3	11	1	4	13	46
Distribution & Wholesale	4	15	2	7	-	-	4	15	3	11	13	48
Manufacturing	2	13	3	19	2	13	2	13	1	6	10	63

Epping Forest District and Brentwood Borough Employment Land Review: Business Survey Results

	0 - 100 sqm		101 – 250 sqm		251 – 500 sqm		501 – 1000 sqm		1000 + sqm		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Other Services	-	-	-	-	-	-	-	-	-	-	-	-
Transport & Communications	1	8	1	8	-	-	2	17	2	17	6	50
Total	26	21	12	10	4	3	12	10	8	6	62	50
By Size												
Micro (1 - 4)	19	38	3	6	1	2	-	-	-	-	23	46
Small (5 – 10)	5	19	1	4	2	7	3	11	1	4	12	44
Medium (11 – 24)	1	4	4	17	1	4	4	17	3	13	13	54
Medium (25 – 49)	1	7	2	14	-	-	5	36	2	14	10	71
Medium (50 – 99)	-	-	-	-	-	-	-	-	1	33	1	33
Large (100 – 199)	-	-	1	17	-	-	-	-	1	17	2	33
Large (200 +)	-	-	1	100	-	-	-	-	-	-	62	50
Total	26	21	12	10	4	3	12	10	8	6	62	50
By Location												
Brentwood	11	19	3	5	3	5	2	4	3	5	22	39
Ingatestone	4	33	3	25	-	-	1	8	-	-	8	67
Rural North	6	32	-	-	-	-	-	-	-	-	7	37
Rural South	5	14	6	16	1	3	9	24	4	11	25	68
Total	26	21	12	10	4	3	12	10	8	6	62	50

Base: 62 respondents

Table 1.40 – Average Size of Premises (Brentwood Borough)

	Number Respondents	Average size (sqm)
By Sector		
Banking, Finance & Insurance	20	928
Construction	13	427
Distribution & Wholesale	13	2225
Manufacturing	10	438
Other Services	-	-
Transport & Communications	6	931
Total	62	1016
By Size		
Micro (1 - 4)	23	67
Small (5 – 10)	12	364
Medium (11 – 24)	13	991
Medium (25 – 49)	10	2583
Medium (50 – 99)	1	1858
Large (100 – 199)	2	8169
Large (200 +)	1	186
Total	62	1016
By Location		
Brentwood	22	1199
Ingatestone	8	167
Rural North	7	376
Rural South	25	1307
Total	62	1016

Question B4: How suitable is your current premises / location for your business?**Table 1.41 – Suitability of current business premises (Brentwood Borough)**

	Very Suitable		Reasonably Suitable		Unsuitable		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	30	75	7	18	3	8	40	100
Construction	23	82	5	18	-	-	28	100
Distribution & Wholesale	21	78	5	19	1	4	27	100
Manufacturing	9	56	6	38	1	6	16	100
Other Services	2	100	-	-	-	-	2	100
Transport & Communications	9	75	2	17	1	8	12	100
Total	94	75	25	29	6	5	125	100
By Size								
Micro (1 - 4)	38	76	9	18	3	6	50	100
Small (5 – 10)	22	81	5	19	-	-	27	100
Medium (11 – 24)	16	67	6	25	2	8	24	100
Medium (25 – 49)	10	71	3	21	1	7	14	100
Medium (50 – 99)	2	67	1	33	-	-	3	100
Large (100 – 199)	5	83	1	17	-	-	6	100
Large (200 +)	1	100	-	-	-	-	1	100
Total	94	75	25	29	6	5	125	100
By Location								
Brentwood	42	74	13	23	2	3	57	100
Ingatestone	10	83	2	17	-	-	12	100
Rural North	14	74	4	21	1	5	10	100
Rural South	28	76	6	16	3	8	37	100
Total	94	75	25	29	6	5	125	100

Question B5: What are the main factors contributing to unsuitability of premises?**Table 1.42 – Factors Contributing to unsuitability of premises (Brentwood Borough)**

Factor	Brentwood		Ingatestone		Rural North		Rural South		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%
Site / premises too small	3	20	-	-	3	60	3	33	9	29
Lack of car parking	3	20	-	-	1	20	-	-	4	13
High business rates	4	26	-	-	-	-	-	-	4	13
Premises too old / in poor condition	1	7	-	-	1	20	-	-	2	6
High rents	2	13	-	-	-	-	-	-	2	6
Poor site access	1	7	-	-	1	20	-	-	2	6
Poor Location	2	13	1	50	-	-	-	-	2	6
Share part of site	-	-	-	-	-	-	2	22	2	6
Poor public realm	-	-	-	-	-	-	1	11	1	3
Poor local facilities / amenities	1	7	-	-	-	-	1	11	2	6
Proximity to competition	1	7	-	-	-	-	-	-	1	3
Work from home	-	-	-	-	-	-	1	11	1	3
Site too big	-	-	-	-	-	-	1	11	1	3
No particular reason	-	-	-	-	-	-	1	11	1	3
Total	15	48	2	6	5	16	9	28	31	100

Base: 31 respondents

Question B6: What are your companies top priority for future infrastructure investment?**Table 1.43 – Future infrastructure investment priorities (Brentwood Borough)**

Factor	Brentwood		Ingatestone		Rural North		Rural South		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%
ICT / Broadband in your locality	8	14	3	25	1	5	4	11	16	13
Transport	5	9	1	8	4	21	3	8	13	10
Advertising / Marketing / getting more customers	5	9	1	8	1	5	2	5	9	7
Property / Develop Premises	5	9	-	-	1	5	2	5	8	6
Recruitment	2	3	-	-	-	-	3	8	5	4
Training	1	2	-	-	-	-	4	11	5	4
Developing the business / growing the business	2	3	1	8	-	-	1	3	4	3
Staying in Business	2	3	1	8	-	-	1	3	4	3
Energy Supply	1	2	-	-	1	5	-	-	2	2
Machinery	2	3	-	-	-	-	-	-	2	2
Recycling / Environment	1	2	-	-	-	-	1	3	2	2
Safety	1	2	-	-	-	-	1	3	2	2
New Products / R & D	-	-	1	8	-	-	-	-	1	1
None	12	21	4	33	7	37	9	24	32	26
Don't Know	10	18	-	-	4	21	6	16	20	16
Total	57	100	12	100	19	100	37	100	125	100

Question B7: Are you planning to expand the business in the next 5 years?**Table 1.44 – Planning to Expand (Brentwood Borough)**

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	18	45	22	55	-	-	40	100
Construction	8	29	17	61	3	11	28	100
Distribution & Wholesale	11	41	16	60	-	-	27	100

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
Manufacturing	9	56	5	31	2	13	16	100
Other Services	1	50	1	50	-	-	2	100
Transport & Communications	7	58	3	25	2	17	12	100
Total	54	43	64	51	7	6	125	100
By Size								
Micro (1 - 4)	20	40	26	52	4	8	50	100
Small (5 – 10)	11	41	15	56	1	4	27	100
Medium (11 – 24)	8	33	15	63	1	4	24	100
Medium (25 – 49)	10	71	3	21	1	7	14	100
Medium (50 – 99)	2	67	1	33	-	-	3	100
Large (100 – 199)	3	50	3	50	-	-	6	100
Large (200 +)	-	-	1	100	-	-	1	100
Total	54	43	64	51	7	6	125	100
By Location								
Brentwood	26	46	28	49	3	5	57	100
Ingatestone	5	42	7	58	-	-	12	100
Rural North	7	37	12	63	-	-	19	100
Rural South	16	43	17	46	4	11	37	100
Total	54	43	64	51	7	6	125	100

Question B8. Will this expansion lead to a need for additional floor space?

Table 1.45 – Need for additional floor space (Brentwood Borough)

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	9	50	5	28	4	22	18	100
Construction	3	38	5	63	-	-	8	100
Distribution & Wholesale	5	45	3	27	3	27	11	100
Manufacturing	7	78	2	22	-	-	9	100
Other Services	-	-	1	100	-	-	1	100
Transport & Communications	3	43	3	43	1	14	7	100
Total	27	50	19	35	8	15	54	100
By Size								
Micro (1 - 4)	10	50	7	35	3	15	20	100
Small (5 – 10)	7	64	2	18	2	18	11	100
Medium (11 – 24)	2	25	5	62	1	13	8	100
Medium (25 – 49)	5	50	3	30	2	20	10	100
Medium (50 – 99)	1	20	1	50	-	-	2	100
Large (100 – 199)	2	67	1	33	-	-	3	100
Large (200 +)	-	-	-	-	-	-	-	-
Total	27	50	19	35	8	15	54	100
By Location								
Brentwood	10	38	12	46	4	15	26	100
Ingatestone	4	80	1	20	-	-	5	100
Rural North	4	57	2	29	1	14	7	100
Rural South	9	56	4	25	3	19	16	100
Total	27	50	19	35	8	15	54	100

Base: 54 respondents

Question B9: Roughly how much additional floor space do you think you will need?

(This question was only asked to those respondents who said in question B8 that their expansion would require additional floorspace)

Only a small proportion of respondents were able to estimate the amount of additional floorspace that they were likely to need. It is therefore not considered appropriate to analyse by industry, business or location.

23 respondents gave estimates equating to an average requirement of 581 square metres.

Question B10: Could this additional floorspace be provided on your current site through the following measures?

Table 1.46 – Measures for providing additional floorspace (Brentwood Borough)

	Extension		Refurbishment		Redevelopment		More Intensive use of existing space		None of these		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector												
Banking, Finance & Insurance	2	22	-	-	-	-	-	-	7	78	9	100
Construction	-	-	-	-	-	-	1	33	2	67	3	100
Distribution & Wholesale	1	13	2	25	3	38	1	13	1	13	8	100
Manufacturing	1	14	1	14	1	14	-	-	4	57	7	100
Other Services	-	-	-	-	-	-	-	-	-	-	-	-
Transport & Communications	1	33	-	-	-	-	-	-	2	67	3	100
Total	5	19	3	11	4	15	2	7	16	59	30	100
By Size												
Micro (1 - 4)	2	18	1	9	2	18	-	-	6	55	11	100
Small (5 – 10)	-	-	2	22	2	22	1	11	4	44	9	100
Medium (11 – 24)	-	-	-	-	-	-	-	-	2	100	2	100
Medium (25 – 49)	2	40	-	-	-	-	1	20	2	40	5	100
Medium (50 – 99)	-	-	-	-	-	-	-	-	1	100	1	100
Large (100 – 199)	1	50	-	-	-	-	-	-	1	50	2	100
Large (200 +)	-	-	-	-	-	-	-	-	-	-	-	-
Total	5	19	3	11	4	15	2	7	16	59	30	100

	Extension		Refurbishment		Redevelopment		More Intensive use of existing space		None of these		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Location												
Brentwood	1	10	1	10	-	-	-	-	8	80	10	100
Ingatestone	1	20	1	20	1	20	2	40	-	-	5	100
Rural North	1	20	-	-	2	40	-	-	2	40	5	100
Rural South	2	20	1	10	1	10	-	-	6	60	10	100
Total	5	19	3	11	4	15	2	7	16	59	30	100

Base: 30 respondents

Question B11: Will this downsizing lead to a need for a reduction in floor space?**Table 1.47 – Need for reduction in floor space (Brentwood Borough)**

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Banking, Finance & Insurance	-	-	-	-	-	-	-	-
Construction	-	-	2	67	1	33	3	100
Distribution & Wholesale	-	-	-	-	-	-	-	-
Manufacturing	-	-	2	100	-	-	2	100
Other Services	-	-	-	-	-	-	-	-
Transport & Communications	-	-	2	100	-	-	2	100
Total	-	-	6	86	1	14	7	100
By Size								
Micro (1 - 4)	-	-	4	100	-	-	4	100
Small (5 – 10)	-	-	-	-	1	100	1	100
Medium (11 – 24)	-	-	1	100	-	-	1	100
Medium (25 – 49)	-	-	1	100	-	-	1	100
Medium (50 – 99)	-	-	-	-	-	-	-	-
Large (100 – 199)	-	-	-	-	-	-	-	-
Large (200 +)	-	-	-	-	-	-	-	-
Total	-	-	6	86	1	14	7	100
By Location								
Brentwood	-	-	2	67	1	33	3	100
Ingatstone	-	-	-	-	-	-	-	-
Rural North	-	-	-	-	-	-	-	-
Rural South	-	-	4	100	-	-	4	100
Total	-	-	6	86	1	14	7	100

Base: 7 respondents

Question B12: Roughly how much less floor space do you think you will need

None of the respondents could identify how much less floorspace that they might require.

Question B13: What are the reasons for downsizing

Only 7 businesses were planning to downsize and the reasons for downsizing included retirement, change of business model, reduced market share and efficiency savings.

Question B14: Have you considered relocating?**Table 1.48 – Considered relocating (Brentwood Borough)**

	Yes		No		Total	
	No.	%	No.	%	No.	%
By Sector						
Banking, Finance & Insurance	8	20	32	80	40	100
Construction	1	4	27	96	28	100
Distribution & Wholesale	3	11	24	89	27	100
Manufacturing	6	38	10	63	16	100
Other Services	-	-	2	100	2	100
Transport & Communications	2	17	10	83	12	100
Total	20	16	105	84	125	100
By Size						
Micro (1 - 4)	5	10	45	90	50	100
Small (5 – 10)	4	15	23	85	27	100
Medium (11 – 24)	5	21	19	79	24	100
Medium (25 – 49)	4	29	10	71	14	100
Medium (50 – 99)	1	33	2	67	3	100
Large (100 – 199)	1	17	5	83	6	100
Large (200 +)	-	-	1	100	1	100
Total	20	16	105	84	125	100
By Location						
Brentwood	8	14	49	86	57	100
Ingatstone	1	8	11	92	12	100
Rural North	3	16	16	84	19	100
Rural South	8	22	29	78	37	100

	Yes		No		Total	
	No.	%	No.	%	No.	%
Total	20	16	105	84	125	100

Question B15: To which of the following locations have you considered locating?**Table 1.49 – Location of considered for Relocation (Brentwood Borough)**

	Brentwood		Rest of Essex		Epping Forest		Rest South East		UK		London		International		Herts		Others		Total	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
By Sector																				
Banking, Finance & Insurance	5	42	5	42	2	17	-	-	-	-	-	-	-	-	-	-	-	-	12	100
Construction	1	50	1	50	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	100
Distribution & Wholesale	2	66	1	33	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3	100
Manufacturing	3	50	1	17	-	-	1	17	1	17	-	-	-	-	-	-	-	-	6	100
Other Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Transport & Communications	1	50	1	50	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	100
Total	12	48	9	36	2	8	1	4	1	4	-	-	-	-	-	-	-	-	25	100
By Size																				
Micro (1 - 4)	4	67	1	17	1	17	-	-	-	-	-	-	-	-	-	-	-	-	6	100
Small (5 – 10)	4	80	1	20	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5	100
Medium (11 – 24)	1	17	3	50	1	17	1	17	-	-	-	-	-	-	-	-	-	-	6	100
Medium (25 – 49)	2	33	3	50	1	17	-	-	-	-	-	-	-	-	-	-	-	-	6	100
Medium (50 – 99)	-	-	-	-	-	-	-	-	1	100	-	-	-	-	-	-	-	-	1	100
Large (100 – 199)	1	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	100
Large (200 +)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

	Brentwood		Rest of Essex		Epping Forest		Rest South East		UK		London		International		Herts		Others		Total	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Total	12	48	9	36	2	8	1	4	1	4	-	-	-	-	-	-	-	-	25	100
By Location																				
Brentwood	5	55	1	11	1	11	1	11	1	11	-	-	-	-	-	-	-	-	9	100
Ingatestone	1	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	100
Rural North	2	50	2	50	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4	100
Rural South	4	36	6	55	1	9	-	-	-	-	-	-	-	-	-	-	-	-	11	100
Total	12	48	9	36	2	8	1	4	1	4	-	-	-	-	-	-	-	-	25	100

Base: 25 respondents

Question B16: Preferred locations for those wanting to relocate

There were only 12 responses to this question with the majority 33% (4 respondents) wanting to locate in Brentwood.

Question B17: To what type of location would you prefer to relocate?

There were only 12 responses to this question with the majority 42% (5 respondents) wanting to relocate in dedicated industrial areas, 33% (4 respondents) wanting to relocate to mixed use areas, and 17% (2 respondents) wanting to relocate in town centre / commercial areas. The remaining respondent felt the building itself was more important than the area.

Question B18: Do you think you would find appropriate premises within the Borough?

Of the 12 respondents to this question with the majority 58% (7 respondents) thought yes they could find appropriate premises in Brentwood, 33% (4 respondents) didn't think they could, and one respondent didn't know.

Question B19: Do you consider the current location of your business to be a good and competitive location?**Table 1.50 – Good and Competitive Location (Brentwood Borough)**

	Yes		No		Total	
	No.	%	No.	%	No.	%
By Sector						
Banking, Finance & Insurance	37	93	3	8	40	100
Construction	28	100	-	-	28	100
Distribution & Wholesale	25	93	2	7	27	100
Manufacturing	14	88	2	13	16	100
Other Services	2	100	-	-	2	100
Transport & Communications	10	83	2	17	12	100
Total	116	93	9	7	125	100
By Size						
Micro (1 - 4)	47	94	3	6	50	100
Small (5 – 10)	25	92	2	7	27	100
Medium (11 – 24)	20	83	4	17	24	100
Medium (25 – 49)	14	100	-	-	14	100
Medium (50 – 99)	3	100	-	-	3	100
Large (100 – 199)	6	100	-	-	6	100
Large (200 +)	1	100	-	-	1	100
Total	116	93	9	7	125	100

	Yes		No		Total	
	No.	%	No.	%	No.	%
By Location						
Brentwood	50	88	7	12	57	100
Ingatestone	12	100	-	-	12	100
Rural North	18	95	1	5	19	100
Rural South	36	97	1	3	37	100
Total	116	93	9	7	125	100

Question B20: Why do you consider it a good and competitive location?

(respondents can give more than one reason and therefore totals do not add to base total)

Table 1.51 – Future infrastructure investment priorities (Brentwood Borough)

Factor	Brentwood		Ingatstone		Rural North		Rural South		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%
Access to road network	24	48	7	58	7	39	22	61	60	52
Proximity to key clients / markets	23	46	1	8	7	39	5	14	36	31
Access to rail network	18	36	2	17	1	6	4	11	25	22
Affordable premises	4	8	4	33	4	22	6	17	18	15
Appropriate type of premises	9	18	2	25	2	11	3	8	17	15
Close to home	5	10	-	-	3	17	4	11	12	10
Good environment / quality of life	2	4	3	25	2	11	3	8	10	9
Proximity to skilled workforce	3	6	1	8	2	11	2	6	8	7
Location not relevant to their business	3	6	1	8	-	-	3	8	7	6
Good car parking	3	6	-	-	2	11	-	-	5	4
Proximity to key suppliers	1	2	-	-	2	11	1	3	4	3
other	-	-	-	-	-	-	-	-	-	-
Total	50	43	12	10	18	16	36	31	116	100

*Base: 116 respondents***Question B20:** Why do you not consider your current location a good and competitive location?

There were only 9 respondents to this question the most common reasons given for Brentwood Borough not being a good location were expensive premises (33%), and poor accessibility (33%).