

APPENDIX A

B-Use Class Definition by SIC

APPENDIX B

Policy Appraisal

B. POLICY APPRAISAL

INTRODUCTION

- B.1 This appendix provides a review of the strategy and policy context for employment land considerations in Hammersmith & Fulham. It also includes a review of key research reports including those supporting national and regional policy development.

NATIONAL POLICY

PPS1 – Creating Sustainable Communities

- B.2 The Government's consultation on PPS1 highlights the need for positive and proactive planning to achieve the creation of sustainable communities. It is stated that planning should facilitate and promote sustainable patterns of urban development by:

- Making suitable land available for development in line with economic, social and environmental objectives to improve the quality of life;
- Contributing to sustainable economic growth;
- Protecting and where possible enhancing the natural and historic environment;
- Ensuring high quality development through good design; and
- Ensuring that development supports existing communities and contributes to the creation of safe, sustainable and liveable communities with good access to jobs and key services.

- B.3 The consultation policy statement emphasises that the planning system has an important role in delivering sustainable economic development.

Consequently, planning authorities should have regard to the importance of encouraging industrial, commercial and retail development. At the same time, planning policies should enable the provision of a suitable mix of housing including adequate levels of affordable housing. Delivering sustainable development requires planning policies to:

- Promote urban regeneration;
- Promote regional, sub-regional and local economies;
- Promote communities which are inclusive, healthy, safe and crime free;
- Bring forward sufficient land of suitable quality in the right locations (housing, industry, retail and commercial development);
- Give high priority to ensuring access for all to jobs, health, education, shops, leisure and community facilities;
- Focus developments that attract a large number of people, especially retail development, in existing centres;
- Protect and conserve natural resources;
- Promote the more efficient use of land; and
- Reduce the need to travel.

B.4 The new approach to spatial planning encourages Local Development Documents (LDDs) to provide a framework for integrating policies for the development and use of land with other policies and programmes which influence the nature of places and how they function. This includes the need to set a clear vision for the future pattern of development, consider the needs of the communities the LDD's cover and help integrate the wide range of activities relating to development and regeneration.

PPG3 – Supporting the Delivery of New Housing

B.5 In January 2005, the ODPM introduced new paragraph 42(a) to PPG3. It highlights that local planning authorities should consider favourably planning

applications for housing or mixed use developments which concern land allocated for industrial or commercial use unless:

'it can be demonstrated, preferably through an up-to-date review of employment land, that there is a realistic prospect of the allocation being taken up for its stated use in the plan period...'

PPG4

- B.6 PPG 4 notes that policies within development plans should provide for choice, flexibility and competition in allocating land for industry and commerce. The guidance recommends that planning authorities should be realistic in their assessment of the needs of business.

Planning for Economic Development

- B.7 In May 2004, the ODPM published this consultancy report which aimed to inform the development of PPS4 (to replace PPG4). It highlighted that a culture of positive proactive planning for economic development is not firmly embedded in the current planning system. A number of important recommendations were made in respect of the policy development and implementation aspects of planning for economic development:

- There is a need for greater integration between the planning system and wider economic strategies, programmes and initiatives.
- All local authorities should undertake an assessment of the demand for and supply of employment land with regular reviews at least every three years.
- The approach to the allocation of employment land should be guided at the regional level by the application of standard techniques to assessing demand and supply. Guidance should also be provided in respect of the criteria for assessing the quality of employment sites. This should focus on factors of market realism and sustainability.
- Following the demand-supply assessments and reviews, local authorities should consider de-allocating or allowing change of use of allocated employment land if there is no reasonable chance of the site coming forward in the medium term.

- Guided by reasoning and appropriate criteria, local authorities should adopt policies to safeguard employment land. This should not be used as a means to hoard employment land and should be subject to regular review (see above).
- The Use Class Order can hinder policies aimed at supporting particular sectors or types of businesses. However, local authorities should consider identifying sites for specific activities and types of organisations (e.g. small firms) where this is consistent with economic and regeneration priorities for the area.
- Comprehensive monitoring systems should be introduced, not only to assess the stock of employment land but also evaluations of the effectiveness of economic policies.

Employment Land Reviews: Guidance Notes (ODPM, 2004)

- B.8 In December 2004, the ODPM issued a guide for planning authorities in respect of assessing the demand for, and supply of, land for employment. The guide is particularly aimed at helping authorities assess the suitability of sites for employment development, safeguard the best sites in the face of competition from other higher value uses and help identify those which are no longer suitable for employment development which should be made available for other uses.
- B.9 The guide identifies a three step process in undertaking employment land reviews:
- Stage 1 – Taking stock of the existing situation, including an initial assessment of ‘fitness for purpose’ of existing allocated employment sites;
 - Stage 2 – Creating a picture of future requirements by using a variety of means to assess the scale and nature of likely demand for employment land and the available supply in quantitative terms¹;

¹ Assessment methods identified include economic forecasting, consideration of recent trends and/or assessment of local property market conditions).

- Stage 3 – Identifying a ‘new’ portfolio of sites through a more detailed review of site supply and quality and identify and designate specific new employment sites in order to create a balanced local employment land portfolio.

B.10 During Stage 1, the guide suggests undertaking an initial appraisal process. Depending on local circumstances, the purpose of the Stage 1 appraisal is to:

- Confirm a selection of ‘high quality’ employment allocations which should, without doubt, be safeguarded for future employment use; and/or
- Assess the suitability of large, underused or vacant industrial sites for redevelopment or upgrading (for continued employment use); and/or
- Identify employment sites which clearly could be released for other uses.

B.11 The guide identifies sets of criteria which can be applied to guide the Stage 1 appraisal. These are reproduced in Tables 2.1 and 2.2 below.

Table B.1 - Criteria to Assess Whether Employment Sites are to be Released

Criteria	Issues
Market Attractiveness Factors	<p>Has the site been formally identified for employment for at least 10 years?</p> <p>Has there been any recent development activity, within the last 5 years?</p> <p>Is the site being actively marketed as an employment site?</p> <p>Is the site owned by a developer or other agency known to undertake employment development?</p> <p>Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring forward for development ?</p> <p>Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?</p> <p>Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?</p>
Sustainable Development Factors	<p>Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/greenfield considerations)?</p> <p>Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?</p>
Strategic Planning Factors	<p>Is the site within an area identified as of strategic importance to the delivery of the RSS/RES?</p> <p>Is the site identified or likely to be required for a specific user or specialist use?</p> <p>Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?</p> <p>Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p> <p>Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?</p>

Source: ODPM, 2004

Table B.2 – Criteria to Identify ‘High Quality’ Allocated Employment Sites

Criteria	Issues
Market Attractiveness Factors	<p>Has there been any recent development activity, within the last 5 years?</p> <p>Is the site being actively marketed as an employment site?</p> <p>Has there been any recent market activity?</p> <p>Is the whole site owned by a developer or another agency which undertakes employment development?</p> <p>Is development for employment viable, with any public funding if it is committed?</p> <p>Is the site immediately available?</p>
Sustainable Development Factors	<p>Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?</p>
Strategic Planning Factors	<p>Is the site within an area identified as of strategic importance to the delivery of the RSS/RES?</p> <p>Is the site identified or likely to be required for a specific user or specialist use?</p> <p>Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?</p> <p>Is the site important in delivering other economic development objectives or the spatial strategy?</p>

Source: ODPM, 2004

B.12 The outcome of Stage 1 is to grade sites so that the ‘best’ sites definitely to be retained, other sites for further appraisal and those sites to be released are clearly defined.

B.13 Stage 2 identifies a range of complementary techniques to provide a quantitative estimate of future requirements for employment land and premises. It is stated that any quantitative assessment of employment land requirements, particularly for individual authorities, needs to be informed by the use of forecasts and surveys. The guide sets out a selection of methods for forecasting future employment levels and the translation of these forecasts to land and/or floorspace requirements. It is highlighted that quantitative assessment of employment land requirements are not reliable over the time horizons of RSSs. It is recommended that they be updated regularly, at no more than five yearly intervals.

B.14 Stage 3 of the appraisal process represents the detailed site assessment and search. This stage should confirm which sites are likely to respond well to the expectations of occupiers and property developers and also meet sustainability criteria. The objective is to undertake a review of the existing portfolio of employment sites, against defined criteria. Table B.3 below sets out the criteria for assessing the quality, market demand and availability of existing employment sites.

Table B.3 – Detailed Appraisal Criteria (Quality, Market Demand & Availability)

Criteria	Issues
Base Information	Site area, floorspace, vacant land etc
Quality of Existing Portfolio & Internal Environment	Age & quality of buildings Noise and other obvious pollutants State of the external areas and public realm Parking, internal circulation and servicing
Quality of the Wider Environment	Adjacent land uses constraining operations or quality of uses on site Perception of the wider environment quality Local facilities for workforce
Strategic Access	Ease of access to main road network Proximity to rail, sea and air freight
Market Conditions/Perception & Demand	Strength of local demand in segment Recent market activity on site Likely market demand and viability of development without intervention
Ownership and User Constraints on Development/ Redevelopment	Identify and number freehold owners Identity of leasehold or other occupiers, length of lease etc Ransom strips or other known constraints on development
Site Development Constraints (undeveloped sites only)	Site access Topography, size and shape Utilities On-site environmental (nature conservation, trees, cultural heritage, landscape) Contamination/ land stability/ on-site structures Amenity of adjacent occupiers
Accessibility	Workforce catchment Access by public transport
Sequential test and Brownfield / Greenfield	Urban, urban edge or outside urban Previously developed in whole or part
Social and Regeneration Policy	Availability of other jobs locally Deprivation in local communities Priority regeneration designation Potential availability of 'gap' funding to develop Ability of site of support particular economic development priority
Other Policy Considerations	Alternative uses if no longer allocated for employment Other material policy considerations.

Source: ODPM, 2004

- B.15 The detailed site appraisal should indicate whether or not there is a shortfall in the supply of land and premises for particular market segments. If this is the case, the criteria should be adjusted and used to identify 'new' employment sites. Paragraph 6.24 of the guidelines identifies the type of shortfalls likely to be identified. These included sites for high quality accommodation, for new service industries; better access, particularly for large scale distribution and, in some areas, additional sites to provide a choice between suppliers.

REGIONAL AND SUB-REGIONAL POLICY

The London Plan

- B.16 Objective 3 of the London Plan aims to:

'...make London a more prosperous city with strong and diverse economic growth.'

- B.17 This includes:

- Creating incentives and opportunities to stimulate the supply of suitable floorspace in the right locations to accommodate economic growth; and
- Releasing employment land that is no longer needed in its current use for new uses.

- B.18 Policy 3B.1 recognises the importance of providing 'a range of premises of different types, sizes, and costs to meet the needs of different sectors of the economy and firms of different types and sizes and to remove supply side blockages for key sectors'.

- B.19 The Plan is complemented by the Mayor's Economic Development Strategy, which supports the use of the planning system to secure suitable and affordable premises (see below).

- B.20 Table 3B.1 highlights that projected demand for office based employment in the West sub-region (including H&F) has the potential to amount to 60,000 jobs, representing a growth rate of 13% in the period 2001-2016. The table also indicates that demand for office floorspace during this period could amount to an additional 1.1 million sqm.

- B.21 Policy 3B.2 seeks to renew and renovate existing office stock and to provide a variety of premises in terms of type, size and cost to meet the needs of all sectors, including SMEs. Policy 3B.3 supports the rejuvenation of office supply in the Central Activities Zone (CAZ) and strategically specified locations. Within and close to H&F, the Plan supports the potential for significant employment generating activities in White City and Park Royal. These areas are identified as Opportunity Areas (Policy 2A.2) which are capable of accommodating substantial new jobs or homes. The Plan also identifies Willesden Junction as an Area for Intensification (Policy 2A.3) where Borough policies should exploit the potential for increases in residential, employment and other uses, through higher densities and more mixed and intensive use.
- B.22 Policy 3B.5 addresses Strategic Employment Locations (SELs) in London which are aimed primarily at meeting London's strategic needs for industrial and wholesale distribution activities. Boroughs are encouraged to identify SELs in their Proposals Maps. Within the SEL framework, Park Royal (part) is designated as a Preferred Industrial Location (PIL) and an Industrial Business Park (IBP). Wood Lane (part) is also identified as an IBP. PILs aim to serve the needs of firms with less demanding environmental requirements whilst IBPs are aimed at companies needing a relatively good quality environment. The dual designation for Park Royal reflects the scale and diversity of opportunity in the area.
- B.23 Policy 5D.1 identifies the strategic priorities for the West London sub-region. These include the following objective which aim to:
- capture the benefits of the economic generators for residents, while ensuring that this development improves not degrades the environment;
 - identify capacity to accommodate new job and housing opportunities and appropriate mixed-use, particularly in key locations including Opportunity Areas and Areas for Intensification;
 - maximise the number of additional homes, including affordable housing;

- promote and intensify retailing, services, employment, leisure and housing in town centres and opportunities for mixed-use development;
- plan for and secure the financial resources to deliver planned transport infrastructure for the sub-region including an improved West London Line, Crossrail 1 and the West London Tram;
- improve the variety, quality and access to available employment sites, especially within SELs;
- identify areas suitable for tall buildings.

B.24 Tables 5D.1 and 5D.2 identify indicative estimates for homes and jobs growth in the Opportunity Areas and Areas for Intensification. This includes approximately 30ha for regeneration in White City and 470ha in Park Royal. Within these areas, the Plan estimates that, respectively, they have the potential to provide up to 11,000 and 10,000 new jobs in the period up to 2016.

B.25 For the White City Opportunity Area, the Plan highlights that the area already has permission for significant new retail provision although there are opportunities to intensify use to meet mostly local need. Moreover, the Plan promotes the area's potential to contribute to the rejuvenation of the office market beyond central London. Proposals for the area should relate to the intensification of development at Shepherd's Bush.

B.26 For Park Royal, the Opportunity Area is closely associated with the longer term development potential at Willesden Junction (see below) and the brownfield railway lands, old industrial and vacant land south to Old Oak Common. The Plan highlights the need to address issues of land assembly and decontamination and improvements to local access and the environment. Consideration should also be given to the area's potential long term role in meeting London's future rail freight requirements.

B.27 Willesden Junction is identified as having potential for substantial employment growth (3,600 up to 2016) and some housing. It is stressed that the area should be planned in co-ordination with Park Royal and the development potential to the south of Old Oak Common.

- B.28 Hammersmith Town Centre and the northern section of the Borough (Willesden Junction to Shepherds Bush) are each identified in the Plan as an Area for Regeneration. This designation depicts the locations where deprivation is within the 20% most deprived wards in London. The Plan highlights the importance of increasing the provision of jobs within the most deprived areas and improving access to jobs in other locations (including Opportunity Areas). Particular emphasis is given to the role of social enterprise activity, the development of small and medium size businesses (SMEs) and ethnic businesses.
- B.29 Policy 3B.9 states that UDPs should support the development of clusters of creative industries and related activities with particular emphasis on priority regeneration areas. Factors which are highlighted as important in influencing the development of these clusters include the availability of low cost workspace. It is noted that there is a strong link between creative industries and new leisure infrastructure, including bars, restaurants and clubs. These are vital to sustaining a high value evening economy.
- B.30 Knowledge transfer and innovation are also identified as important drivers in the London economy. Consequently, local authorities are encouraged to ensure an adequate supply of high quality and affordable premises, incubator units and sites for synergy between business and research and academic institutions.

Sustaining Success – Strategy for the London Economy

- B.31 Published in January 2005, this document represents the economic development strategy prepared by the London Development Agency (LDA) on behalf of the Mayor of London. The strategy is an implementation tool of the London Plan and includes sub-regional priorities and objectives for regeneration areas identified in the Plan. The Strategy states that there is a need for a strategic, planned and managed approach to protection or release of former employment land. Paragraph 3.1.5 highlights that:

'A realistic view will need to be taken of the likelihood of reuse, taking into account not only changes to economic structure, but also demand for other uses (including warehousing and logistics, on which London relies for provision of essential goods and services) and linkages to the needs of the surrounding communities.'

- B.32 Key objectives of the Strategic include the need to:

- (i) Deliver an improved and effective infrastructure to support London's future growth and development;
- (ii) Tackle barriers to employment;
- (iii) Reduce disparities in labour market outcomes between groups;
- (iv) Address the impacts of concentrations of disadvantage;
- (v) Address barriers to enterprise start-up, growth and competitiveness;
- (vi) Maintain London's position as a key enterprise and trading location.

B.33 The Strategy highlights the importance of providing suitable workspaces for SMEs. Paragraph 5.1.3 states that:

'London's enterprises, especially Small and Medium Sized Enterprises (SMEs), need an adequate supply of suitable workspaces. Pension funds and other large property investors have traditionally been reluctant to invest in certain types of SME workspace. In recent years, SME property has been more attractive than other forms of commercial development...'

Industrial Capacity – Draft SPG

B.34 In September 2003, the Mayor issued draft SPG on industrial capacity in London. The SPG defines industrial employment as that relating to manufacturing and wholesale distribution activities.

B.35 The SPG aims to supplement the policies of the London Plan. The primary aims of the draft SPG are to:

- Ensure that there is an adequate stock of industrial employment capacity to meet the future needs of different types of industry in different parts of London, including that for good quality and affordable space; and
- Plan, monitor and manage the release of genuinely surplus industrial land so that it can better contribute to strategic and local planning objectives, especially those to provide more housing and particularly affordable housing. In appropriate locations where it can contribute to

town centre renewal, offices, leisure and retailing as well as high density housing will be appropriate.

- B.36 The 'plan-monitor-manage' approach to planning for industrial land aims to bring demand and supply into closer harmony. It also allows for the stock of premises to be managed so that it provides a competitive offer for different types of occupier which requires both improving the quality of provision to meeting users' different needs and maintaining lower cost capacity (SGP1).
- B.37 The draft SPG highlights the success of the SEL Framework² in protecting London's principal industrial locations. However, it also acknowledges that the Framework could run the risk of fossilising land as 'industrial' when there is no longer demand for this use. The requirement (of the SPG) is to monitor closely demand and supply relationships and to review the framework in light of these aims to keep the framework in tune with market requirements and broader planning objectives. SPG2 (Strategic Employment Locations Framework) requires UDPs to identify components of the SEL Framework and promote these sites as the prime industrial locations for industrial activity in London. The differing offers of PILs and IBPs should be managed to meet the different types of industry appropriate to each.
- B.38 Other than as part of a strategically co-ordinated process of mixed-use intensification, the draft SPG states that development of non-business uses within the SEL should be resisted except where they provide local, small scale, 'walk to' services for industrial occupiers (e.g. workplace crèches).
- B.39 With regard to smaller industrial sites, which lie outside the SEL Framework, the SPG seeks to protect such sites for industrial activity where they continue to meet industrial requirements. However, it also recognises that historic policy was unrealistic in seeking to prevent the transfer to other uses. The SPG advocates a more flexible, criteria-based approach to industrial capacity. UDPs should demonstrate that there is local demand for these sites to remain in industrial use. SPG3 states that UDPs should:

'protect locally important, viable industrial sites, which lie outside the SEL Framework after testing them in the light of evidence of local and strategic demand and against the criteria in paragraphs 6.12-6.15. These sites should be identified on UDP proposals maps'.

² Strategic Employment Locations.

B.40 The criteria approach distinguishes between strategic factors, site characteristics and industrial demand factors. These are summarised in Table 2.4 below.

Table B.4 - SPG Criteria (Paragraphs 6.12-6.15)

Strategic Factors	<ul style="list-style-type: none"> • Meets short term and/or strategic demand for industrial development; • Forms part of larger area of existing industrial activity; • Supports clusters of industrial activity; • Meets needs of new or emerging industry; • Well located to take advantage of existing or proposed infrastructure; • Offers potential for the provision of small industrial units serving local residential and commercial areas; • Contributes to local employment objectives and local economic diversity.
Site Characteristics	<ul style="list-style-type: none"> • Well located in relation to the strategic highway network or local highway network, causing minimal traffic impact in residential areas; • Offers potential for transport of goods by rail or water; • Located within or adjacent to a town centre (for high trip generating uses); • Well located in relation to public transport facilities (for high trip generating uses such as offices, leisure and retail); • Offers potential for 24-hour working, or provides facilities for 'bad neighbour' without detriment to residential amenity; • Office potential for space intensive activities; • Provides lower cost industrial accommodation suitable for small, start-up or lower-value industrial uses or other businesses important to the local economy; • Provides sufficient space for adequate parking and turning space for goods vehicles.
Industrial Demand Factors	<ul style="list-style-type: none"> • Adequately marketed at realistic prices for a reasonable period (normally at least two years) and with potential for industrial redevelopment where this is required to meet the needs of industrial users; • Has been vacant for a considerable period (normally two years, and up to five years of generally strong demand), without realistic prospect of industrial re-use.

B.41 For other industrial sites not shown on UDP Proposals Maps and lying outside the SEL Framework, SPG4 states that local authorities should develop criteria-based policies to manage the release from or retention in industrial use. Such policies should take account of demand and the criteria set out in the SPG (see Table B.4 above). The policy also highlights that sites released from industrial use should meet strategic as well as local planning concerns. The first priority should be to meet the need for housing including affordable

housing. Increasing capacity for town centre related development is also considered important in appropriate locations.

- B.42 The SPG highlights that there will be sub-regional differences in the demand for and supply of industrial space. Hammersmith and Fulham is the only borough in West London classified for 'restricted transfer'. This is the most protective of the three categories by encouraging those local authorities to adopt a particularly restrictive approach to the transfer of industrial sites to other uses. The remainder of the Western local authorities are classified for 'limited transfer'.³
- B.43 The SPG encourages boroughs to develop criteria-based policies which seek to retain sites in industrial use which are considered to be most important for industrial users. These will generally include the better quality industrial sites, but may also include poorer quality sites which provide scope for low cost industrial accommodation for which there is demand.
- B.44 SPG5 (Industrial Capacity and Mixed Use Development) allows for the re-development, intensification and selective support for higher density, mixed uses in appropriate locations so long as this does not compromise the strategic and local reservoirs of industrial capacity.
- B.45 The guidance states that Preferred Industrial Locations (PILs) and some appropriately located sites outside the SEL framework will continue to provide the most sustainable home for industrial uses which would not benefit from being mixed with other activities. However, some industrial uses can be less onerous on potential neighbours can offer greater scope for mixed and more intensive forms of development. These might include activities that place a higher premium on value added rather than volume and those with higher employment densities. Good public transport access is highlighted as a pre-requisite for more intensive forms of development.
- B.46 The SPG identifies the edge of town centres and locations where industrial developments can be closely integrated with a wider mix of surrounding uses as appropriate for mixed use and intensified development. This may include the accommodation of industrial uses on lower floors of mixed use developments (vertical integration).

³ Limited transfer is a category intermediate between 'restrictive transfer' and 'managed transfer'.

- B.47 It is highlighted by the SPG that the need to increase housing provision, especially affordable housing, will be an important priority on permissible mixed use redevelopments. Leisure, retail, civic and other town centre uses will also be appropriate if the mixed use development can be integrated with broader proposals for town centre renewal. However, other than to provide small scale, local convenience services, such uses will not be appropriate outside town centres.
- B.48 Mixed-use development should only be permitted where it will support the central policy objective of ensuring an adequate stock of industrial employment capacity and the wider objective of encouraging better use of land such as that which can be brought about by mixed use redevelopment.
- B.49 SPG5 states that boroughs and other partners should:
- identify strategically recognised industrial sites or parts of sites which have good public transport accessibility, especially those within or on the edge of town centres, for industry led, higher density, mixed redevelopment. This redevelopment should not incur a significant net loss of industrial employment capacity or compromise the offer of wider areas as competitive industrial locations.
 - establish robust and sensitive industrial relocation arrangements to support redevelopment where necessary.
 - where necessary improve provision of small scale, 'walk-to' amenities and services including crèches, which serve the needs of people working within industrial areas.
- B.50 In seeking to improve the quality and variety of industrial capacity in London, SPG6 encourages boroughs to: enhance the operating environment within and around all viable industrial areas; secure low cost premises to meet local needs; encourage redevelopment of industrial areas to enhance their offer as competitive locations attractive to modern industry; seek imaginative design and investment solutions which do not entail a net loss of industrial employment capacity and make more efficient use of space; secure planning agreements to achieve DLP objectives depending on local circumstances; and make provision for demand for 'difficult neighbour' industrial uses (normally within PILs).

- B.51 SPG7 (Small Industrial Enterprises) encourages boroughs to protect industrial sites which meet demonstrable demand for lower cost industrial accommodation and promote the provision of small businesses and start-up companies. Authorities should also seek to secure provision of small and affordable industrial units in appropriate locations as part of larger mixed-use schemes.
- B.52 Recognising the importance of storage and distribution industries to the London economy, SPG8 requires provision to be made for large scale distribution activities in environmentally acceptable PILs with good access to the strategic road network, and generally resist such development elsewhere. Smaller warehouse facilities and mixed industrial / warehouse units should generally be accommodated with the SEL framework in line with strategic road capacity.

Draft SPG – Housing Provision

- B.53 In December 2004, the GLA issued a draft SPG on Housing Provision. This provides guidance on maximising London's housing capacity whilst making the most efficient use of the stock of land. Similar to the Industrial Capacity guidance, the draft SPG highlights that economic restructuring and more efficient use of land can justify the continued release of approximately 50ha of industrial land per annum (3 hectares per annum in the West sub-region). It reiterates the need to protect Strategic Employment Locations (SELs) and Locally Significant Industrial Sites and highlights that the main components of industrial land use change to other uses are expected to be:
- Releases of smaller industrial sites either planned through LDFs that take account of SPG criteria or in response to proposals which are tested against these criteria;
 - Selective mixed use re-development and intensification of parts of SELs in appropriate locations (where a significant net loss of industrial employment capacity does not occur);
 - Consolidation and re-configuration of parts of SELs through the SRDF process;

- Wider scale review of and revision to the SEL framework leading to the re-designation of SELs;
- Exceptional, strategically important releases for strategic infrastructure projects (such as the 2012 Olympics), which may have a residential component.

Industrial and Warehousing Land Demand in London (GLA, 2004)

B.54 In August 2004, the GLA published a research report on industrial and warehousing land demand in London. The project was carried out primarily to inform the emerging strategic and local employment land policy context in London. This includes:

- The final version of the GLA Supplementary Planning Guidance on Industrial Capacity (see Section 2);
- Sub-Regional Development Frameworks;
- The GLA's response to PPG3 revisions on the transfer of former employment land to housing; and
- Development Plan Reviews and Local Development Frameworks.

B.55 The research focused on two key issues:

- to assess the balance of demand and supply for industrial and warehousing land testing a previous estimate that some 50ha per year London wide could be released to other uses and providing guidance for individual sub-regions and boroughs; and
- to provide an assessment of current and future requirements for warehousing space, and recommend strategic planning policies for meeting these requirements.

B.56 The report highlights that the occupiers of industrial and warehousing land are drawn from a wide spread of SIC sectors including elements of transport and storage, construction, recycling and refuse disposal. The consultants concluded that:

- the inclusion of these sectors results in a significant increase in total demand for industrial and warehousing space compared to traditional estimates; and
- the additional sectors have better prospects for growth compared to manufacturing.

B.57 Using a revised definition of industrial and warehousing employment, the report implies a slower reduction in forecast demand for industrial/warehousing land than previously thought. In Appendix C, we demonstrate that employment in some of the industrial and warehousing sectors have grown significantly over the last decade and can be expected to do so over the next 10 years. Despite this, the Mayor's report reiterates the previous conclusion that London can release 50 ha of industrial / warehousing land per annum up to 2016.

B.58 An important conclusion of the Mayor's research is that London performs a specialised and relatively high value role within the industrial warehousing sector. It is reiterated that industries which find London a competitive location are those which:

- Serve London markets.
- Are near the end of the physical production process, producing final goods rather than capital equipment or intermediate goods.
- Produce time-sensitive goods and services.
- Are high-productivity and high-value-added, but not necessarily high-technology.
- Are at the borderline of industry and services, with 'tertiary' content.

B.59 The Borough of Hammersmith and Fulham plays an important contribution to ensuring that industrial and warehousing activity in West London is focused on these functions.

- B.60 According to the research, demand for industrial / warehousing floorspace and land is relatively high compared to other parts of London except in East London. It is noted that there is much less pressure on floorspace in the East.
- B.61 Whilst the report highlights that net demand for industrial / warehousing land in London has been falling for many years and that the planning system has been reducing supply accordingly, it is emphasised that:
- '...the high and rising pressure of demand in large areas of London suggests that, in these areas, there is a risk that the reduction in planned supply may run ahead of the reduction of market demand – so that the shift to other uses drives the contraction of industry and warehousing, rather than responding to it' (para 11 Executive Summary).*
- B.62 Although the importance of the warehousing and logistics sector is often underplayed in London and the South East, the report highlights that it provides a vital support to the London economy and supports a wide range of spatial, economic and transport policy objectives for London.
- B.63 Based on ODPM data provided in the GLA report, Table B.5 demonstrates that industrial land vacancy rates in Hammersmith & Fulham are low compared to the sub-region and London as a whole. Indeed, the Borough accounts for only 4% of vacant industrial land in the West London sub-region despite having 7% of total industrial stock. The lack of vacant industrial land in absolute and proportional terms indicates that the potential for loss to other uses is limited. However, it is important to note that the land vacancy figure produced in the GLA report was adjusted to remove land under construction for other uses. Indeed, the low level of vacant industrial land reflects, in part, significant land releases in recent years.
- B.64 Vacancy rates for industrial premises are comparable to the London average. The GLA industrial and warehousing report infers that such a rate is an efficient frictional rate. With vacancy rates for premises in the Borough being slightly higher than that for land, it may indicate a degree of deficiency in the quality of some premises and the need for modernisation and investment in line with market needs.

Table B.5 - Industrial and Warehousing Property Market Indicators

Indicator	H&F	West Sub-Region	London	Source
Vacant Floorspace (%)	8.3	6.2	8.2	ODPM
Vacant Land (%)	3.6	5.6	12.2	ODPM
Vacant Land (ha)	4.4*	104	854	ODPM
Prime Rents (£/sq.ft.)	£12.5	£10	-	King Sturge
Prime Land Values (£'000 / acre)	£1.5m	£2m	-	King Sturge
Avg Industrial & Warehousing land take-up (ha per annum 92-01)	0.432	19.5	46	ODPM

Source: RTP / GLA Industrial and Warehousing Land Demand, 2004 / ODPM 2004

* Vacant land estimates adjusted to discount development land at White City and Sands End.

B.65 Using ODPM statistics, Table B.5 indicates that the calculated annual take-up rate in Hammersmith & Fulham over the period 1992-2001 was 0.432 ha per annum. With identified vacant land amounting to 4.4 ha, this indicates 10 potential years supply. However, because the data excludes offices and industrial/warehousing developments of less than 1,000 sqm, the years supply assessment is misleading in the context of the complete employment land sector. Indeed, this is particularly relevant in Hammersmith and Fulham where demand for B1 / office accommodation is particularly significant. In addition, the relatively modest rate of take-up recorded by the ODPM statistics will, to a large degree, reflect the limited size and specialised nature of the industrial and warehousing stock in Hammersmith and Fulham.

B.66 Rents and land values are reasonably high which indicates that demand from industrial and warehousing occupiers is strong relative to the rest of the sub-region and the rest of London.

The Report's Policy Implications

B.67 A range of significant policy implications are highlighted in the report. These are considered below.

- (i) As already highlighted, the reports concludes that the release of industrial and warehousing land at an average of 50 ha per annum is correct (without the sector being priced out by demand from other uses). It is recommended that the SPG place the onus on the Sub-

Regional Development Frameworks to allocate the totals across the Boroughs: the scale of release should vary between sub-regions. Broad guidance on how this should be delivered is provided by the threefold classification of Boroughs shown in the draft SPG.

- (ii) It is concluded that the contraction of industrial employment is not as significant as it has been in past decades. This reflects the mature stage of industrial restructuring that many parts of London have reached. Indeed, the capital's growing population will place upward pressure on demand within many modern industrial and warehousing sectors. Manufacturing employment in Hammersmith and Fulham is already low and the job market is operating at a relatively efficient level.
- (iii) The consultants preferred scenario redistributes demand from sub-regions where demand is tight (including the Central and West sub-regions) to the East where there is a large supply of industrial and warehousing land. However, there is a lack of evidence to suggest that the market can be 'bent' in such a significant way. Furthermore, measures for implementing the redistribution of demand are not identified. The Preferred Scenario highlights that the West sub-region could transfer 41ha of industrial land over the period 2001 to 2016. This represents only 5.5% of total transfer land in London and is equivalent to the loss of 2.7 ha per annum.
- (iv) Despite the focus for shifting demand to the East, the sub-region accounts for the bulk of land released some 500 ha between 2001 and 2016.
- (v) It is stated that the release of 50 hectares per annum in London will be made up of two factors: a fall in occupied land because of industrial decline; and a fall in the existing total of vacant land to bring it in line with the minimum required for proper operation of the market. These indicators should be analysed to determine the 'potential transfer supply' at the local level relative to trends at the sub-regional level. It is our view that sub-regional initiatives which distribute losses amongst boroughs should reflect comprehensive assessments of the supply-demand balance at the local and strategic levels.
- (vi) It is important to allow sufficient industrial and warehousing land for 'churn and intensification'. There is a need to combat physical decay

and meeting changing occupier requirement. It is suggested that the public sector take a strong lead in facilitating redevelopment and intensification (particularly areas which are underutilised). This process may lead to more jobs and in some cases, more housing.

Proposed Changes to Draft SPG

B.68 It was recommended in the report that the qualitative criteria outlined in the draft SPG should include two additions:

- An industrial/warehousing site might be deemed viable if it can be developed at normal industrial/warehousing land values (as set by benchmarks for the sub-region), adjusted for any abnormal costs or other particular characteristics. This would help distinguish activity that is not competitive in London from activity which is driven out by higher value land uses.
- If a site needs infrastructure or reclamation which cannot be paid for by industrial/warehousing land values, this might constitute an argument against protecting it for purely industrial/warehousing use.

London Office Policy Review (LOPR)

B.69 Published in August 2004, the London Office Policy Review highlights that historically, the West sub-region has been the largest office market in outer London. In addition to the 'Heathrow factor' the sub-region offers large corporate occupiers the widest choice of office space in terms of building and location type anywhere in outer London. The offer includes:

- Major towns including Hammersmith;
- Office campus style business parks including Park Royal and Hammersmith Embankment; and
- Arterial roads, offering very visibility for large corporations.

B.70 The report authors state that each of the above location types still retain 'substantial development capacity' within the sub-region.

- B.71 Comparing projected demand for office floorspace to committed office development, it is concluded that the West sub-region has almost sufficient capacity to meet demand up to 2016. Total demand for office accommodation is estimated at 10.5 million sq.ft compared to committed office development of 9.6 million sq.ft.
- B.72 Specifically for Hammersmith & Fulham, it is estimated that floorspace demand to 2016 will amount to 2.02 million sq.ft. This compares to committed office development totalling 2.45 million sq.ft⁴. These figures exclude the potential for an additional 2 million sq.ft of office accommodation as part of the White City development proposal.
- B.73 It is highlighted by the report that Hammersmith and Fulham is a 'highly unusual borough'. It is stated that the Borough's 'exceptions policy' has prevented the loss of employment land to residential, unless the residential use is predominantly affordable. The report authors consider that had this policy not been in place, market pressures for transfer of employment land to residential and other uses would have been intense since the mid 1990s.
- B.74 The LOPR compares office values with residential values and, based on market experience, makes a judgement as to whether speculative office development is likely to be viable in the short term (to 2006) and in the medium term (to 2011). On the basis of this judgement they suggest policy implications for each Borough. It is concluded that that 'viable office is only likely to take place in Hammersmith town centre and, in the medium term (2007-2011), White City. In other key locations including Sand's End, Fulham and Shepherd's Bush, it is recommended that the Council pursue a policy of promoting residential-led mixed-use development.
- B.75 Whilst we do not question the on-going role of Hammersmith town centre as a strategic location for prime office development, the conclusions of the report do not give adequate consideration to the needs of small occupiers. These issues are considered later in this Section.

WEST LONDON ECONOMIC DEVELOPMENT STRATEGY

- B.76 In December 2004, West London Business published the West London Economic Development Strategy in association with West London Alliance

⁴ Table 22, GLA 2004

and the LDA. The strategy identifies six key themes relating to skills, business competitiveness, land and property, housing, transport and the environment. In terms of business competitiveness, key objectives include the need for a more integrated support service for businesses and the provision of a world-class and targeted inward investment and aftercare service. Particular emphasis is also given to developing the competitiveness of key sub-sectors within knowledge-based industries including the creative industries, tourism and ICT.

- B.77 The land and property theme highlights the need to supply a sufficient quantum and range of sites and premises to meet the GLA's projected employment growth. Furthermore, it is stressed that strategic employment areas and key local employment sites should be safeguarded for employment use. Encouraging more vibrant and diverse town centres is also of central importance to the strategy. The strategy emphasises that there is evidence of unmet demand for small managed workspaces, specifically business incubators for SMEs and community and voluntary organisations. Indeed, it is stated that demand pressure for these facilities is likely to continue into the future.

LOCAL POLICY

Neighbourhood Renewal Strategy

- B.78 The H&F Neighbourhood Renewal Strategy was issued in September 2002. This highlights that the Borough is one of the most polarised localities in the country. The vision of the strategy is:

- To deliver economic prosperity, safe communities, high quality education, affordable housing and better health to the more deprived parts of the borough;
- In the most deprived neighbourhoods, to take action to facilitate lower unemployment and crime, better health, residents with enhanced education and skills, more affordable housing, and an improved physical environment;
- To provide effective services for key target groups, particularly younger people in H&F;

- To bridge the gap between rich and poor neighbourhoods, and to bring deprived neighbourhoods up to the national average.

B.79 The strategy identifies the priority neighbourhoods for action, which are:

- Wormholt and White City;
- College Park and Old Oak;
- The Coningham Neighbourhood;
- Shepherds Bush town centre;
- Hammersmith town centre;
- North Fulham; and
- Central Fulham.

B.80 The document presents a profile of Hammersmith and Fulham which highlights that the Borough is characterised by:

- One of the highest standardised mortality rates in the country for men;
- High teenage pregnancy rates;
- Very high land and house prices and significant inequality in housing conditions experienced by ethnic minority groups;
- Crime rates are higher than the national average;
- Unemployment is higher than the London and national averages;
- Significant differences within the borough in terms of educational attainment.

B.81 There are a range of existing area-based regeneration programmes operating in the borough. These include:

- Park Royal Partnership area / Objective 2 area;
- Hammersmith & Fulham SRB;
- North Fulham New Deal for Communities area;
- Surestart Coningham / Broadway & Margravine.

B.82 The strategy highlights a range of key recent developments and other major plans and proposals for employment generating development in the Borough's priority area.

Hammersmith & Fulham UDP

B.83 The LDF will replace the Hammersmith and Fulham UDP, adopted in 2003. Policy G6 of the UDP states that the Council will:

'...seek to sustain a wide range of economic activities in the Borough, subject to satisfactory environmental conditions, and to ensure that all borough residents have access to an adequate supply and variety of local jobs'.

B.84 It is stated that the above aim will be achieved by:

- promoting the regeneration of land and premises in a manner which enhances the diversification of the local economy and encourages business and industry to locate in or remain in the Borough;
- retaining in employment use land which currently provides employment provided that this is environmentally acceptable;
- guiding employment developments that are major generators of travel and transport demand to town centres and otherwise to locations of high public transport accessibility;
- defining employment zones for particular B class activities having regard, in particular, to their accessibility by public transport;
- requiring large B1 proposals on appropriate sites in town centres to part of mixed-use schemes that retain and provide other facilities that

are appropriate to the scale, nature and location of the scheme and contribute to the viability and vitality of the town centre, whilst preserving and enhancing the character of the area;

- seeking to ensure the availability of a range of business accommodation, including that suitable for small business;
- seeking to ensure that, where appropriate, new developments generating employment provide for training and childcare, which directly benefits local people;
- improving the quality and accessibility of employment areas through regeneration initiatives and other environmental and transport measures;
- promoting hotels and other facilities for visitors to the Borough especially in town centres.

B.85 It is highlighted in the UDP that the changing nature of employment in the Borough has changed the amount of land in employment use and has had an impact on the mix of premises available for businesses. These types include:

- (i) Ageing stock often in poor condition and underused;
- (ii) New developments built as 'shed' type development and refurbished properties (usually well let); and
- (iii) Modern office buildings of all sizes.

B.86 At the time the UDP was being prepared, the third category was noted as resulting from the Borough's increasing attractiveness as a major location for offices, including those decentralising from central London. At the time, significant shortages in supply were anticipated. Whilst the Borough has remained an important office location since the UDP was prepared, the commercial property market in London has faltered. Consequently, the shortfall in prime, high value offices has not presently occurred.

B.87 The UDP adopted policies are aimed at providing strong protection for the retention of existing employment sites. Policy E1 identifies 10 Employment

Zones which are targeted at development of B uses. The designation serves to ensure that employment activities have priority over competing land uses.

B.88 Policy E3 protects sites and buildings providing employment outside Employment Zones and town centres. The policy defines the only exemptions to B1-B8 uses being when:

- a) the proposal is for other non-residential uses that provide significant employment, and there is no identified need for the site or buildings for Class B uses; or
- b) the proposal is wholly for affordable housing, the site is vacant and the development would not prejudice the continuation of adjacent employment uses; or
- c) the proposal involves the site or buildings being development to the maximum plot ratio for Class B1-B8, but such development does not occupy the whole of the site, whereupon development of the residual part of the site for affordable housing will be acceptable; or
- d) the proposal is for any other use and the application is supported by a statement of the efforts made to secure re-use for Class B1-B8 or similar uses or other non-residential use that provides employment, which indicates that there is no realistic prospect of the site or buildings being used or re-used including redevelopment for these purposes; or
- e) the site or buildings would be physically unsuitable for re-use for Class B1-B8 or similar use, even after adaptation, refurbishment or redevelopment, in terms of siting, design, access, layout and relationship to neighbouring buildings and uses.

B.89 The supporting text states that, where an application is made under clause (d) the applicant should include as a minimum requirement:

- The length of time the property has been unused for employment purposes;
- The length of period during which it has been actively marketed for such purposes which should include the possibility of redevelopment

and should provide evidence of this marketing (not normally less than 12 months). The evidence should show where the property has been marketed including publications and a wide circulation such as property journals;

- The prices at which the land and buildings have been marketed during this period which should reflect that obtained for similar property in the locality;
- A list of all expressions of interest during this period;
- An evaluation of why it is considered that the property has failed to attract interest from potential occupiers or for redevelopment for B Class use.

B.90 Coupled with E1, this policy has been effective in strongly protecting employment sites for B Class use in the Borough.

B.91 Policy E3A sets out the Borough's policy on combined living and working development schemes (live-work units). It is stated that such schemes will only be permitted on employment sites outside the employment zones in accordance with the requirements of Policy E3(d) or (e) and:

- a) there is no prejudice to the supply of affordable housing; and
- b) the design, construction and layout of the development would render the workspace of any live/work unit physically unsuitable for use only as living space; and
- c) the living space is used only by the occupants of the business use or their employees.

B.92 Policy E5 makes provision for protecting and providing Class B accommodation for small firms. For employment schemes of 5,000 sqm. or more proposed in Employment Zones or town centres, 10% of the proposed floorspace should be in the form of self-contained units suitable for small scale class B1 business units in units of 500 sqm. or less. Proposals within residential and other areas, 50% of the proposed floorspace should comprise similar small units.

- B.93 Policy E8 seek to improve employment areas through Government funding, where appropriate, in partnership with the firms and businesses involved, and through redevelopment.
- B.94 With regard to town centres in the Borough, Policy TC5 (Business and Other Employment Generating Uses) protects existing employment premises by stating that permission will not be granted for development involving the loss of land or floorspace in class B or other similar employment use. However, the policy also promotes a mix of other town centre uses and safeguards these by stating that development for B class and other employment generating uses will only be permitted if:
- d) there would be no loss of shopping, leisure, entertainment, community services or housing floorspace and, in the case of office schemes of more than 2,500 sqm., the proposal includes shopping and/or leisure and/or entertainment and/or community service uses or, if adjacent to a predominantly residential area, affordable housing; and
 - e) class A1 retail use is included at street level as part of any scheme within the prime shopping frontages where, in accordance with policy TC2 there is an existing under-representation of class A1 uses.
- B.95 The UDP identifies Hammersmith town centre as the preferred location for major office developments of 2,500 sqm. and above (Policy HTC1). It is highlighted that the availability of vacant office floorspace is low in Hammersmith town centre, and that additional accommodation could be provided to reinforce the role of the centre as a location for major office occupiers (including international HQ occupiers).

SRB 3 White City / SRB 5 Bridging the Divides

- B.96 The Hammersmith and Fulham Regeneration Partnership is responsible for the operation of the combined SRB programmes. The combined area stretches from the north of the Borough down to the river along the eastern boundary. The strategic objectives of the Programme are to:
- Enhance the employment prospects, education and skills of local people, particularly the young and those at a disadvantage;

- Encourage sustainable economic growth and wealth creation by improving the competitiveness of the local economy, including support for new, existing businesses and promote initiatives of benefit to ethnic communities;
- Protect and improve the environment, infrastructure and housing conditions through physical improvement, better maintenance, management and diversity and to promote sustainable regeneration; and
- Tackle crime and drug abuse and improve community safety and address social exclusion and enhance opportunities for the disadvantaged.

B.97 The Programme is due for completion in 2005/06 and includes the allocation of over £28million of SRB funds. The Delivery Plan for 2003/04 estimates that total public and private sector spend/investment at the end of the Programme will amount to approximately £126million.

Media Workspace Infrastructure Project

B.98 In 2003, a consultancy report was commissioned by LBH&F to assess the supply and demand situation in respect of media workspace in the Borough, and to identify the specific requirements of the media industry. The work was undertaken in response to the lack of affordable and flexible workspace identified by the Media West London Strategy.

B.99 The study highlighted the importance of the media sector to the Borough in employment terms. Sectors well represented in the area include radio, television, publishing and reproduction of sound/video.

B.100 It is suggested that net demand from existing firms is relatively low as a result of the lack of affordable premises and the loss of firms to cheaper locations including East London. The study highlighted that there is a general lack of supply of small units (under 100 sqm.), particularly in the Hammersmith and Fulham areas where demand is highest.

B.101 Significantly, the report highlights that there is a large gap between the levels of rent currently paid by firms and the rent levels achievable within the current

stock. Over 85% of firms surveyed wanted to pay less than £200 / sqm. whilst only one third of properties on West London Business' database provided for this.

North Hammersmith Employment Zones Study

B.102 In June 2003, this study provided recommendations in respect of an appropriate mix of uses in the Wood Lane and Hythe Road Employment Zones and options for an employment accommodation mix on the Wood Lane Zone.

B.103 The study highlighted that North Hammersmith enjoys an exceptional strategic location in terms of access to major public and private transport routes, concentrations of business clusters and inner and outer London labour markets. The potential of the area has been driven by a range of initiatives including the BBC's commitment to concentrate its broadcasting activities in the Wood Lane area and the planned Chelsfield White City development which will bring modern retailing and consumer services within walking distance of much of Wood Lane Employment Zone.

B.104 It was concluded that much of the existing economic activity in the Wood Lane Employment Zone could be relocated, which would provide opportunities for creating:

- A mixed use, high value office-based development in Wood Lane EZ (including research and light industrial activities); and
- Modern operating conditions for industrial activities in the Hythe Road EZ (including provision of relocation opportunities from Wood Lane).

B.105 The consultants estimated that approximately 33,000 jobs could be provided in the Wood Lane EZ (in service and research sectors of strategic importance), and up to 5,000 jobs in the Hythe Road EZ. However, implementation of these development concepts, particularly in relation to the Hythe Road EZ, would be partly dependent on planning gain transferred from the White City development.

Park Royal Partnership Strategy

B.106 Park Royal Partnership is a regeneration area in West London which transcends three local authority boundaries including Hammersmith and Fulham. It provides a base for nearly 2,000 businesses, 27% of which are accounted for by the wholesale, distribution and logistics sectors. The area also provides for a mix of activities including manufacturing, business services, creative industries, ICT and health. Approximately 40% of businesses are ethnic minority owned.

B.107 The Strategy for Park Royal aims to create an additional 25,000 jobs to the area over the period 2002-2012. Other key targets for the area include the redevelopment of 80 hectares of brownfield land, provision of 50,000 sqm. of incubator and growth space and the establishment of 100 firms with an exemplary approach to environmental sustainability. Key development sites within Park Royal include Willesden Junction and the 'Eastern Gateway'. However, the future of this area depends on the provision of new transport services including Crossrail and Orbirail.

New Deal for Communities

B.108 The north Fulham NDC strategy aims to ensure that local residents are able to secure well paid jobs, or start their own businesses and to provide skills training linked directly to job opportunities. Particular priority is given to the creation of opportunities for target groups including black and ethnic minority residents, lone parents, refugees and asylum seekers, youth, and other groups disadvantaged in the local economy. The enterprise strategy includes a range of training, business and career development support. It focuses on key sectors in the economy including retail, business services, leisure and hospitality. By year 3, the strategy aims to decrease significantly the difference in unemployment rates between the NDC area and the rest of the Borough.

White City Opportunity Area – A Framework for Development

B.109 In September 2004, LBHF adopted Supplementary Planning Guidance for the White City Opportunity Area. The framework identifies objectives and principles for development in the area. The Council's and GLA's Vision for White City is for the area to become a.. *'thriving new, mixed-use urban quarter of the highest quality, with a strong sense of place and local identity shared*

with the surrounding community.’ The Vision supports substantial levels of new office development and a range of other uses. This will include a mix of employment activities, new leisure facilities, affordable homes and local community facilities that will..’consolidate the regeneration process in the White City and Shepherd’s Bush area and help to sustain London’s growth.’

B.110 With regard to mix of land uses envisaged for White City, the framework highlights that the priority for development is to maximise the development of jobs in a high quality mix of employment generating activities. The framework calls for a mix of accommodation principally in the range of B Class uses. This reflects the area’s designation as a Strategic Employment Location in the London Plan. Accommodation should provide for a variety of type, size and cost of premises to meet the needs of all sectors including SMEs. It is stressed that employment provision must maximise local job opportunities for local people.

APPENDIX C

Socio-Economic Appraisal

C. SOCIO-ECONOMIC APPRAISAL

INTRODUCTION

- C.1 This Appendix provides a profile of the prevailing socio-economic conditions and an assessment of local property market conditions in Hammersmith and Fulham. It aims to provide the economic and property market context which shape employment land demand and supply factors in the Borough. It provides an important input to understanding economic demand / need in Hammersmith & Fulham within the context of the London and wider economies.

ECONOMIC APPRAISAL

Broad Sector Analysis⁵

- C.2 Table C.1 sets out the broad sector employment in Hammersmith & Fulham.⁶ In 2003 nearly 105,000 jobs were provided in the Borough (excluding self-employment). This represents an increase of nearly 18,000 jobs (20.5%) since 1998 (compared to just 3.8% and 5.6% in London and GB respectively). The increase in employment during this period is similar, in percentage terms, to that of the previous 5-year period (1993 – 2003) when employment rose by 21.7%. 1993 was the last of a series of years when employment was falling in Hammersmith & Fulham due to the recession. The strongest growth came at the end of the 1990s.
- C.3 It can also be seen from Table C.1 that the Hammersmith & Fulham economy is dominated by employment in four key broad sectors of industrial classification, namely: banking, finance and insurance (38.6%); the public

⁵ The employment and business establishments analyses set out in this Appendix are based on data provided by the Annual Business Inquiry (ONS) and exclude self-employment. This data is not directly comparable with 2001 workplace data provided by the 2001 Census which implies a lower count of employment. However, the ABI data provides the main source of up-to-date workplace data and is consistent with estimates of employment set out in the GLA Interim Borough Level Employment Projections (draft, Current Issues Note 4, 2005).

⁶ See appendix for a list of 2 digit SIC's that constitute the broad category sectors.

sector (26.7%); public administration education and health (20.6%); distribution hotels and restaurants (20.1%); and other services (18.0%). Analysis over the period 1993 to 2003 shows that these sectors, excluding public administration, education & health have all experienced strong rates of employment growth.

C.4 These trends reflect Hammersmith & Fulham's strong role as an important office centre and as a strategic gateway location for West London.

Table C.1 - Workplace Employment in Hammersmith & Fulham 1993-2003

Sector	1993		1998		2003		Annual % Growth	% Change 1991– 2002
	No.	%	No.	%	No.	%		
Agriculture & fishing	8	0.0	22	0.0	9	0.0	1.2	12.5
Energy & water	289	0.4	18	0.0	35	0.0	-19.0	-87.9
Manufacturing	3 828	5.4	5 681	6.5	6 608	6.3	5.6	72.6
Construction	2 969	4.2	1 685	1.9	1 183	1.1	-8.8	-60.2
Distribution, hotels & restaurants	12 189	17.1	17 404	20.0	21 070	20.1	5.6	72.9
Transport & communications	3 951	5.5	5 676	6.5	5 429	5.2	3.2	37.4
Banking, finance & insurance	14 819	20.7	23 445	27.0	29 974	28.6	7.3	102.3
Public admin, education & health	20 321	28.5	18 291	21.0	21 588	20.6	0.6	6.2
Other services	13 052	18.3	14 713	16.9	18 889	18.0	3.8	44.7
TOTAL	71 426	100	86 934	100	104 785	100	3.9	46.7

Source: Annual Business Inquiry.

C.5 In contrast to the trend in Greater London, employment in the manufacturing sector has expanded by around 73% over the period between 1993 and 2003. Indeed, in 1993 manufacturing employment in Hammersmith & Fulham accounted for 5.4% of all jobs in the Borough. By 2003, this proportion had increased to around 6.3%. Table C.2 highlights the differences between the growth in manufacturing based employment in Hammersmith and Fulham, and the decline both regionally and nationally of -6.7% and -4.1% respectively. The increase in manufacturing employment largely is accounted for by the expansion of the publishing, printing and reproduction media sector.

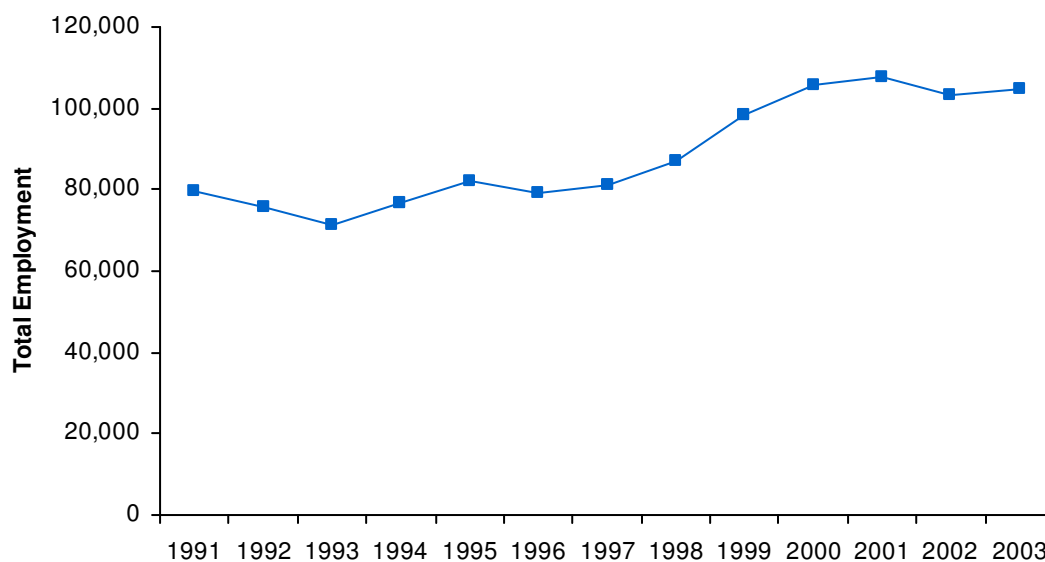
- C.6 Growth was also significantly higher than the regional and national averages in the banking, finance and insurance category which increased by 7.3% per annum, and distribution, hotels and restaurants at 5.6% (includes retail).

Table C.2 - Employment Growth Rates 1993-03 (annual average % pa)

Sector	Hammersmith & Fulham	London	Great Britain
Manufacturing	5.6	-4.9	-4.3
Construction	-8.8	-1.2	0.6
Distribution, hotels & restaurants	5.6	1.3	1.4
Transport & communications	3.2	-0.1	1.8
Banking, finance & insurance	7.3	1.0	2.4
Public admin, education & health	0.6	2.2	2.9
Other services	3.8	1.2	3.1
TOTAL	3.9	0.7	1.1

Source: Annual Business Inquiry. (Note: table excludes the agriculture & fishing and energy & water sectors)

- C.7 These trends indicate that the Borough is developing its strength as a location for financial and business services as well as modern, higher value manufacturing related activities (many of which will be accommodated in B1 premises).
- C.8 Figure C.1 illustrates the pattern of total employment change over the period 1991 to 2003. It shows how total employment increased steadily during the second half of the 1990s to level out over the period 2000-2002, which reflects caution in terms of business confidence over the last few years.

Figure C.1 - Hammersmith & Fulham Total Employment 1991-2002

Source: Annual Business Inquiry

Detailed Sector Analysis

C.9 In understanding the dynamics of the local economy, it is useful to examine changes in employment by 2-digit SIC code (see Table C.3 below⁷).

⁷ Table excludes data which cannot be disclosed to third parties according to compliance requirements set out by the Chancellor of the Exchequer Notice / 1947 Statistics of Trade Act.

Table C.3 - 2 Digit SIC Employment in Hammersmith & Fulham (Selected SIC's)

Sub-sector	1993	1998	2003	Change '93-'03	Annual & growth	% growth '93-'03
Publishing, printing, repro recorded media	1 108	3 223	4 109	3 001	14.0	270.8
Manuf. fabricated metal products, etc	91	135	119	28	2.7	30.8
Manuf. furniture; manufacturing nec.	152	270	308	156	7.3	102.6
Collection, purification/distribution of water	n/a	n/a	0	-	-	-
Construction	2 969	1 685	1 183	-1 786	-8.8	-60.2
Sale, maintenance/repair motor vehicles	925	1 072	1 593	668	5.6	72.2
Wholesale trade/commission trade, etc	2 354	3, 791	3, 627	1 273	4.4	54.1
Retail trade, except of motor vehicles	5 628	6 715	7 832	2 204	3.4	39.2
Hotels and restaurants	3 282	5, 825	8 018	4 736	9.3	144.3
Land transport; transport via pipelines	1 832	1 835	1 264	-568	-3.6	-31.0
Supporting/auxiliary transport activities etc	1 198	1 836	1 672	474	3.4	39.6
Post and telecommunications	689	1 799	2 066	1 377	11.6	199.9
Financial intermediation, etc	1 290	1 375	1 081	-209	-1.8	-16.2
Acts auxiliary to financial intermediation	106	135	258	152	9.3	143.4
Real estate activities	1 483	1 915	2 928	1 445	7.0	97.4
Renting machinery/equipment, etc	564	584	522	-42	-0.8	-7.4
Computing and related activities	882	2 792	3 855	2 973	15.9	337.1
Other business activities	10 044	15, 070	19 790	9 746	7.0	97.0
Public admin/defence; compulsory SS	4 449	4 646	4 017	-432	-1.0	-9.7
Education	5 204	4, 313	6 466	1 262	2.2	24.3
Health and social work	10 668	9 332	11 105	437	0.4	4.1
Activities membership organisations nec	464	387	435	-29	-0.6	-6.3
Recreational, cultural and sporting	11 643	12 602	16 624	4 981	3.6	42.8
Other service activities	611	1 315	1 425	814	8.8	133.2
Private households with employed persons	0	0	0	0	-	-
Extra-territorial organisations/bodies	0	0	0	0	-	-

Source: Annual Business Inquiry

C.10 From our analysis of sub-sector employment trends, a number of important observations can be made in respect of the Hammersmith & Fulham economy:

- (i) Other business activities represent the most significant employment sector at the 2-digit level, providing nearly 19,800 jobs in 2003, equivalent to 18.9% of total borough employment. This category includes a range of services such as professional services, management consultancy, renting of vehicles and equipment, software consultancy, repair of office machinery, advertising, industrial cleaning and labour recruitment. Many of these services support core business activities and have a range of locational requirements. Nevertheless, many of these activities are suited to locations with excellent access to Central London and a large and diverse labour supply. Consequently, many of Hammersmith & Fulham's employment sites are likely to provide an important opportunity to accommodate many of these service activities. Employment in this sub-sector has increased by over 9,700 since 1993 and is likely to remain a major source of growth over the next decade.
- (ii) Almost as significant in employment terms as other business activities in Hammersmith & Fulham is the recreational, cultural and sporting sector. It provided over 16,600 jobs in 2003, accounting for 15.9% of total employment in the Borough. The high number of employees in this classification reflects the location of the BBC in the Borough (classified under radio and television activities). Despite the prevalence of the BBC, organisations in this sector will have a range of land use and property requirements which should be reflected by provision to be made in the LDF. The sector expanded by nearly 43% between 1993 and 2003 (nearly 5,000 additional jobs), with the bulk of the growth coming in the second half of the period.
- (iii) Hammersmith & Fulham's established role as a centre for retail is reinforced by analysis at the detailed level. Indeed, between 1993 and 2003 employment in retail trade sector increased by over 2,200 people.
- (iv) Public sector activities are an important source of employment in Hammersmith & Fulham. The education and health sector may provide further growth opportunities in the future. However, policy should focus on ensuring that this is balanced with growth in a wide range of private sector activities.
- (v) Over 8,000 jobs are provided in the hotels and restaurants sector in Hammersmith & Fulham. This sector has experienced rapid growth

over the past 10 years with employment increasing by 144.3% and it currently accounts for 7.7% of the total borough employment.

- (vi) It has already been highlighted that the publishing, printing and reproduction of recorded media sector dominates the manufacturing sector in Hammersmith & Fulham. Indeed, employment in the sector increased by over 270% between 1993 and 2003.

C.11 Figures C.2 and C.3 (and Tables C.4 and C.5) illustrate how Hammersmith & Fulham's existing employment structure is placed relative to growing and declining sectors in the Greater London and national economies⁸. Industries identified in the upper right quadrant are those which have experienced growth in the London or national economy and are also well represented in Hammersmith & Fulham.

C.12 Relative to the London economy, Figure C.2 shows that Hammersmith & Fulham is particularly well positioned in respect of other services sectors. The sector has experienced relatively strong growth in London over the last decade and displays positive prospects.

C.13 The lower left hand quadrant contains those sectors that are underrepresented in Hammersmith & Fulham and are in decline regionally. Only agriculture & fishing and energy & water fall into this category and both are minor sectors in Hammersmith & Fulham.

C.14 The remaining 2 quadrants contain the categories that are likely to experience divergence in their degrees of representation relative to the London average. With regard to the manufacturing sector, the degree of activity in Hammersmith & Fulham has been increasing relative to London (with a location quotient rising from 0.6 to 1.1 between 1993 and 2003). Whilst it is likely that aggregate demand in the manufacturing sector will continue to decline at a regional and national level, this trend will have little impact on Hammersmith & Fulham unless demand in the publishing, printing and recorded media sector changes significantly. Indeed, the classification of publishing and related activities within the manufacturing sector is misleading as these businesses are essentially service-based. Consequently, there is

⁸ Location Quotient of less than 1.0 indicates that employment in the sector is underrepresented in Hammersmith & Fulham compared to the wider area. A quotient greater than 1.0 indicates that employment in the sector is overrepresented.

very limited evidence to suggest that the Borough has the potential to transfer employment land to alternative uses as a result of restructuring in the manufacturing sector.

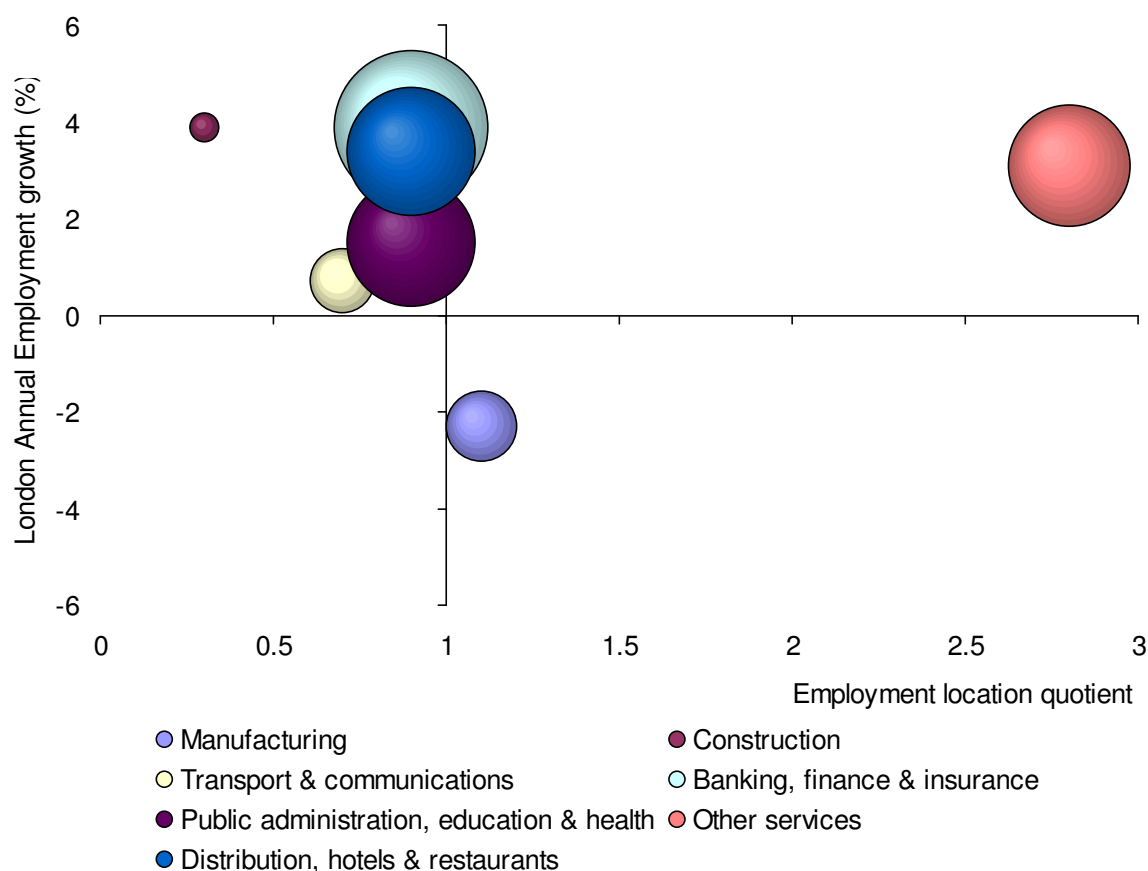
- C.15 Banking, finance & insurance, distribution, hotels & restaurants and public administration, education & health are the three largest sectors in Hammersmith & Fulham. Whilst they fall into the upper left quadrant, it should be noted that all are reasonably well represented with location quotients of 0.9.

Table C.4 - Employment Location Quotients: Hammersmith & Fulham vs. London (1993 – 2003)

Sector	1993	1998	2003
Manufacturing	0.6	0.9	1.1
Construction	1.5	0.5	0.3
Distribution, hotels & restaurants	0.8	0.9	0.9
Transport & communications	0.6	0.8	0.7
Banking, finance & insurance	0.8	0.9	0.9
Public admin, education & health	1.2	1.0	0.9
Other services	3.0	2.7	2.8
TOTAL	1.0	1.0	1.0

Source: Annual Business Inquiry

Figure C.2 - Hammersmith & Fulham vs. London Employment Location Quotients (1993) and Sectoral Change in London (1993-2003)



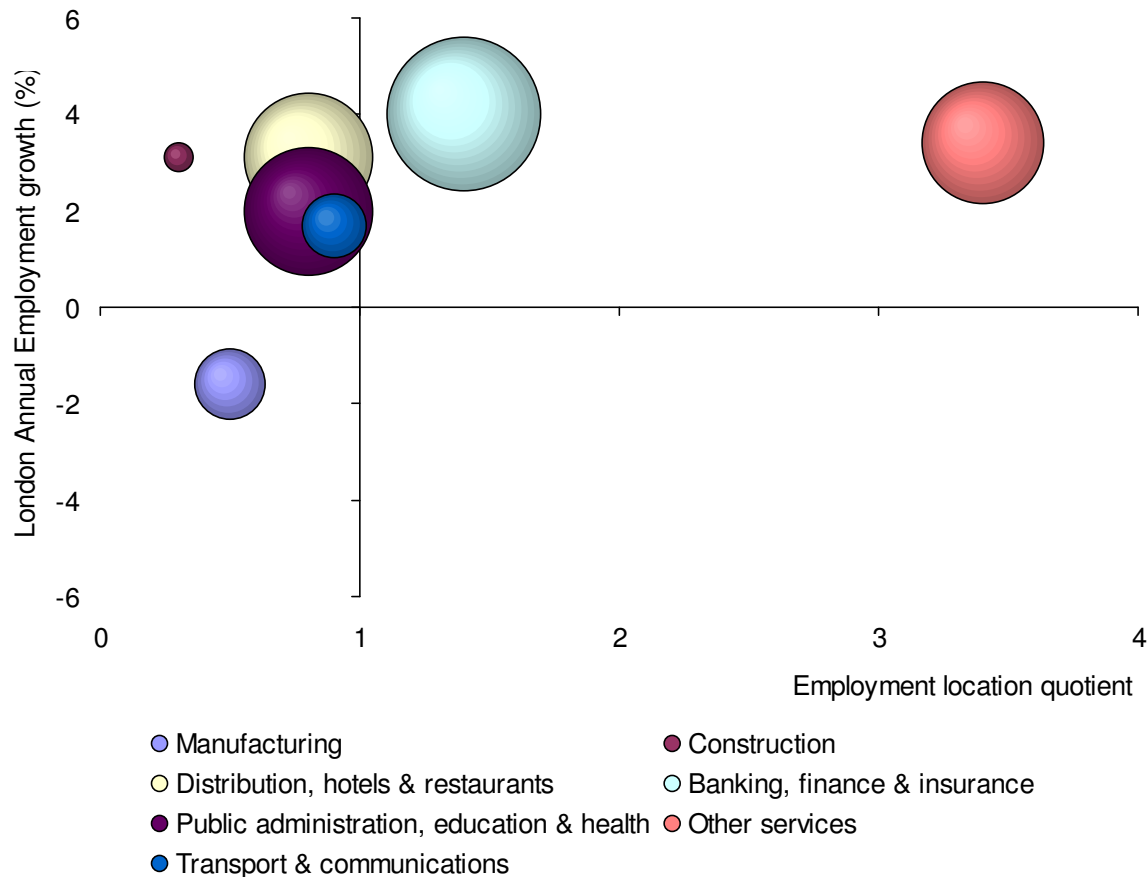
Source: Annual Business Inquiry

Table C.5 - Hammersmith & Fulham vs. Great Britain Employment Location Quotients

Sector	1993	1998	2003
Manufacturing	0.3	0.4	0.5
Construction	1.0	0.4	0.3
Distribution, hotels & restaurants	0.8	0.8	0.8
Transport & communications	0.9	1.1	0.9
Banking, finance & insurance	1.3	1.5	1.4
Public admin, education & health	1.1	0.9	0.8
Other services	4.1	3.6	3.5
TOTAL	1.0	1.0	1.0

Source: Annual Business Inquiry

Figure C.3 - Hammersmith & Fulham vs. Great Britain Employment Location Quotients (2003) and Sectoral Change in Great Britain (1993-2003)



Source: Annual Business Inquiry

C.16 Relative to the national economy, the Borough's employment structure appears slightly more orientated towards recent growth sectors: other services and banking, finance & insurance have both experienced growth at the national level over the past decade and are well represented in Hammersmith & Fulham. Transport & communications is also reasonably well represented with a quotient of 0.9.

C.17 In terms of employment in manufacturing, Hammersmith & Fulham is not well represented compared to the national average despite its current position relative to the rest of London.

B Use Class Employment

C.18 Most 'employment' policies contained in development plans relate to jobs associated with premises which accommodate business and industrial

activities categorised under the B Use Class (B1a, B1b, B1c, B2 and B8). Although an important component of total employment is generated by activities not classified as a B use, it is important for our analysis to consider separately activities traditionally the subject of employment policies in development plans. However, it is important to note that the Government is considering changes to the current use class system although no firm proposal have been made at the time of writing.

Table C.6 - Estimates of B Use Class Employment in Hammersmith & Fulham 1993-2003

B-Use Class Sector	1993		1998		2003		Annual % growth '93-'03	% change '93-'03
	No.	%	No.	%	No.	%		
B-Use Banking, finance & insurance	14 819	35.9	23 445	42.8	29 974	45.5	7.3	102.3
B-Use Construction	2, 969	7.2	1 685	3.1	1 183	1.8	-8.8	-60.2
B-Use Distribution & wholesale	3, 279	7.9	4 863	8.9	5 220	7.9	4.8	59.2
B-Use Manufacturing	3 828	9.3	5 681	10.4	6 608	10.0	5.6	72.6
B-Use Other services	12 441	30.1	13 398	24.5	17 464	26.5	3.4	40.4
B-Use Transport & communications	3 951	9.6	5 676	10.4	5 429	8.2	3.2	37.4
TOTAL	41 287	100	54 749	100	65 878	100	4.8	59.6

Source: Annual Business Inquiry / Atkins Economics (Nov 2004). Excludes Public Administration. See Appendix A for list of SICs assumed to fall in B use class.

C.19 Table C.6 sets out estimates of B use class jobs in Hammersmith & Fulham which amounted to a total of approximately 65,900 in 2003 (63% of total employment). These have been calculated using an in-house modelling technique⁹. Of particular significance, the analysis highlights the importance of the banking, finance and insurance sector which accounts for around 63% of all B use class employment in Hammersmith & Fulham (2002). Importantly, this sector includes 'other business activities' such as professional services, management consultancy, renting of vehicles and equipment, software consultancy, repair of office machinery, advertising, industrial cleaning and labour recruitment.

⁹ See the appendix for a list of SIC's that constitute the B-use class employment

Industrial and Warehousing Employment

- C.20 GLA commissioned research published in 2004 highlighted that definitions of industrial and warehousing employment should be drawn from a wider spread of SIC sectors than identified in most traditional definitions¹⁰. The primary purpose of the study was to inform the final SPG on industrial capacity. The key conclusions and implications for employment land requirements in Hammersmith and Fulham are described in Section 3 of the main report.
- C.21 The wider definition of industrial and warehousing employment results in a significant increase in employment numbers for these sectors in London. Indeed, many of the sub-sectors have much better prospects for growth compared to manufacturing, which traditionally has been used to define 'industrial employment'.
- C.22 Using the SIC definitions provided in the study, Tables C.7 and C.8 set out the level of industrial and warehousing related employment in Hammersmith & Fulham relative to London. It also sets out location quotients for the activities which provide a measure of the extent to which employment in each activity compares to the London-wide benchmark.
- C.23 Of critical importance, is to note that the study's definition of industrial activities excludes publishing, printing and related activities. The some manufacturing category excludes publishing (SIC 22.11-22.15) and the some construction only includes SICs 45.33 to 45.45.

Table C.7 - Industrial Sector Employment in Hammersmith & Fulham

Sector	1993	2003	% change '93-'03	Location quotient with London
Some manufacturing	3,141	3,023	-52.6	0.7
Motor vehicle activities	438	558	383.6	1.2
Sewage & refuse disposal	334	405	297.6	1.3
Some construction	167	262	796.4	0.3
TOTAL	4,080	4,248	57.6	0.7

Source: Annual Business Inquiry. Definitions provided by Industrial and Warehousing Land Demand Report, GLA (2004) – excludes publishing and printing. NOTE: Data in Table above – Confidential to LB Hammersmith & Fulham.

¹⁰ Industrial and Warehousing Demand and Supply, Roger Tym & Partners for GLA (2004).

Table C.8 - Warehousing Sector Employment in Hammersmith & Fulham

Sector	1993	2003	% change '93-'03	Location quotient with London
Freight transport by road	C	115	43.8	0.2
Cargo handling	0	0	0.0	0.0
Storage & warehousing	C	C	73.9	0.5
Other supporting land transport activities	C	C	96.8	0.2
Wholesale	2 354	3 627	54.1	0.8
Post & courier activities	C	691	41.6	0.5
TOTAL	3 022	4 614	52.7	0.6

Source: Annual Business Inquiry. Definitions provided by Industrial and Warehousing Land Demand Report, GLA (2004). NOTE: 'C' – Confidential due to HM Treasury restrictions.

C.24 When the publishing, printing and related sector is excluded from the analysis, Tables C.7 and C.8 highlight that industrial and warehousing employment is significantly lower than most other parts of London.

C.25 In 2003, industrial employment in Hammersmith & Fulham accounted for 4.1% of all employment compared to 5.8% in London. Excluding publishing, the only other industrial sector of significance in the Borough is that classified as 'other manufacturing'. This may include activities such as the manufacture of office machinery and computers, radio and TV equipment and furniture. Two of the key areas for Hammersmith & Fulham included under other manufacturing are the manufacture of food & beverages and the manufacture of chemicals and chemical products.

C.26 Warehousing activities accounted for 4.4% of total employment in Hammersmith & Fulham in 2003. This proportion was at its highest in 1996 when it peaked at 7.0%. Since then the sectors significance has declined reflecting the shift towards banking, finance, and the business services based sectors. With the exception of Wholesale, which increased marginally (London location quotient of 0.8), the remaining activities defined within the warehousing sector are of limited significance in Hammersmith & Fulham. Indeed, both the industrial and warehousing sectors are shown to be

significantly underrepresented compared to London as a whole (with location quotients of 0.7 and 0.6 respectively).

- C.27 It is important for planning policies to take into consideration the effect of Hammersmith & Fulham moving into a period of increased restructuring in the future.

Population and Labour Market

- C.28 Table C.9 shows that total population in Hammersmith & Fulham increased by nearly 19,000 (11.5% change) between 1991 and 2002. This compares to 6.8% for Greater London as a whole and illustrates the importance of the area as a popular residential area.

Table C.9 - Total Population in Hammersmith & Fulham 1991-2002

Area	1991		1996		2002		Annual % Growth	% Change 1991 - 2002
	Level	% Of Total	Level	% Of Total	Level	% Of Total		
Males	73300	47.7	72700	47.7	85500	49.5	1.4	17.6
Females	80500	52.3	82200	52.3	87200	50.5	0.7	6.1
Total	153800	100.0	154900	100.0	172700	100.0	1.1	11.5

Source: NOMIS (Nov 2004)

- C.29 It will be important to ensure that the population growth anticipated for Hammersmith & Fulham over the next decade is matched by a commensurate increase in local job opportunities. This will be particularly important in encouraging a sustainable and balanced local economy in Hammersmith & Fulham.
- C.30 Examination of the age distribution of Hammersmith & Fulham's population shows that the Borough's age structure currently is younger than that for the rest of the country (Table C.10). Indeed, from the cumulative column¹¹, it is shown that the proportion of people aged under 50 increased from 79.4% to 82.5% between 1991 and 2002, whereas nationally this fell from 74% to 72.9%.

¹¹ The cumulative proportion represents the proportion of the population who are either at or below the age in question.

Table C.10 - Population by Age Band in Hammersmith & Fulham 1991-2002

	1991		1996		2002	
	% Of Total	Cumulative	% Of Total	Cumulative	% Of Total	Cumulative
Under 1 year	1.4	1.4	1.4	1.4	1.4	1.4
1 - 4 years	4.7	6.1	4.9	6.3	4.6	6.0
5 - 9 years	4.8	10.9	5.1	11.4	4.9	11.0
10 - 14 years	3.9	14.8	4.3	15.8	4.3	15.3
15 - 19 years	4.4	19.2	4.7	20.4	4.8	20.0
20 - 24 years	12.1	31.3	9.2	29.6	8.2	28.2
25 - 29 years	15.3	46.6	14.2	43.8	14.5	42.7
30 - 34 years	9.9	56.5	12.0	55.8	13.3	56.0
35 - 39 years	6.8	63.3	8.1	63.9	9.8	65.7
40 - 44 years	6.3	69.6	5.9	69.8	7.0	72.7
45 - 49 years	5.1	74.8	5.8	75.6	5.3	78.0
50 - 54 years	4.6	79.4	4.7	80.3	4.5	82.5
55 - 59 years	4.2	83.6	4.3	84.6	4.1	86.7
60 - 64 years	3.8	87.3	3.7	88.3	3.3	90.0
65 - 69 years	3.6	90.9	3.2	91.5	2.9	92.8
70 - 74 years	3.1	94.0	3.0	94.6	2.4	95.2
75 - 79 years	2.9	96.9	2.3	96.9	2.0	97.2
80 - 84 years	1.8	98.7	1.7	98.6	1.6	98.9
85 and over	1.3	100.0	1.4	100.0	1.1	100.0

Source: NOMIS (2004).

Working Age Population

C.31 For the purposes of this study, working age population has been defined as those persons aged between 16 and 64 inclusive. Table C.11 sets out the working age population for Hammersmith & Fulham, London and Great Britain for the years 1991, 1996 and 2002. In 1991, approximately 68.3% of the total population in Hammersmith & Fulham were of working age. This was above in the national and regional averages of 64.6% and 62.8% respectively. The rate of working age population in Hammersmith & Fulham remained above the London and GB averages, increasing to nearly 70% by 2002.

Table C.11 - Working Age Population (Aged 16 to 64)

Area	1991		1996		2002		Annual % Growth	% Growth '91-'02
	Working Age	% of total population	Working Age	% of total population	Working Age	% of total population		
Hammersmith & Fulham	105113	68.3	108000	69.7	120000	69.5	1.2	11.1
London	4411749	64.6	4353325	63.1	4722000	64.2	0.6	8.5
Great Britain	35053891	62.8	34112388	60.5	35025000	60.9	0.0	2.7

Source: NOMIS (2004)

Economic Activity

- C.32 The level of economic activity, often referred to as the available workforce, is the sum of working age population who are either in employment, or registered as unemployed. The economic activity rate is calculated by the quotient of workforce to working age population, and can be regarded as a measure of economic participation.
- C.33 Table C.12 sets out the levels and rates of economic activity for Hammersmith & Fulham, London and England & Wales for the years 1991 and 2001. In 1991, 77.6% of the working age population were economically active in Hammersmith & Fulham. This was above the London and national averages of approximately 75.9% and 75.3% respectively. By 2001 the rate of economic activity in Hammersmith & Fulham had fallen to around 73.7%. Nationally the economic activity rate fell by far less, down to 74.1%, and is now higher than for Hammersmith & Fulham. This raises important questions regarding the need to address the factors that cause local residents to be excluded from the workforce.

Table C.12 - Economic Activity Levels & Rates

	1991		2001		Annual % growth	% change '91 - '01
	Level	% of working age	Level	% of working age		
Hammersmith & Fulham	81 600	77.6	88 935	73.7	0.9	9.0
London	3 350 141	75.9	3 527 262	73.0	0.5	5.3
England & Wales	23 955 558	75.3	24 641 559	74.1	0.3	2.9

Source: Census 1991 & Census 2001

Unemployment

- C.34 Table C.13 sets out the unemployment figures for Hammersmith & Fulham, London and Great Britain for a selection of years between 1991 and 2005. The data is taken from the Claimant Count and represents unemployment as at July for each year. The rate indicates the proportion of the resident working age population that are counted as unemployed.
- C.35 In 1996, 9.4% of the workforce was registered as unemployed in Hammersmith & Fulham. This rate was higher than the regional average and significantly higher than the national average, which reflects the extent of deprivation in central and northern parts of the Borough.
- C.36 Rates have fallen considerably since 1996, in line with national trends, and in 2005 unemployment in Hammersmith & Fulham was marginally lower than the regional average, although still above the national average.

Table C.13 - Unemployment Levels & Rates

	Hammersmith & Fulham		London		Great Britain	
	Level	Rate	Level	Rate	Level	Rate
1991	9,560	-	334,670	-	2,177,180	-
1996	10,140	9.4	360,595	8.1	2,056,370	6.0
1998	6,325	5.8	226,290	5.0	1,301,565	3.7
2000	4,665	4.0	171,535	3.6	1,038,265	3.0
2002	4,480	3.6	165,305	3.4	906,195	2.5
2005	3,945	3.1	161,630	3.3	835,000	2.3
Annual % growth	-6.1		-5.1		-6.6	
% change '91-'05	-58.7		-51.7		-61.6	

Source: Claimant Count. (Note: all figures are taken as of July of that year)

Wages

C.37 Table C.14 shows that average weekly wages in Hammersmith & Fulham are significantly higher than the national rate, but slightly lower than the London averages in 2002. It should be noted however that the average conceals wage disadvantage in many occupations including personal/protective service occupations and sales occupations. Given the concentration of high value added corporations in Hammersmith & Fulham, average wages in managerial and associate professional occupations are particularly high. Disparities in average wages within Hammersmith & Fulham (by occupation) again demonstrate the degree of economic polarisation within the Borough.

Table C.14 - Average Weekly Wage Levels £ (Workplace)

Employment Category	Hammersmith & Fulham		London		Great Britain	
	1999	2002	1999	2002	1999	2002
Managers/Administrators	683	784	733	898	600	703
Professional Occupations	706	767	645	765	544	632
Associate Professional/Technical	562	605	642	687	469	520
Clerical/Secretarial Occupations	337	374	333	378	275	309
Craft/Related Occupations	391	423	424	462	357	396
Personal/Protective Service Occupations	348	396	354	410	296	337
Sales Occupations	452	375	337	371	302	338
Plant/Machine Operatives	351	526	370	424	319	356
Other Occupations	354	352	313	328	272	298
Average	539	616	525	624	402	465

Source: NOMIS (Nov 2004)

Table C.15 - Annual Average Wage Growth (1999 – 2002)

Employment Category	Hammersmith & Fulham		London		Great Britain	
Managers/Administrators	4.7		7.0		5.4	
Professional Occupations	2.8		5.9		5.1	
Associate Professional/Technical	2.5		2.3		3.4	
Clerical/Secretarial Occupations	3.5		4.3		3.9	
Craft/Related Occupations	2.7		2.9		3.5	
Personal/Protective Service Occupations	4.4		5.0		4.3	
Sales Occupations	-6.0		3.3		3.8	
Plant/Machine Operatives	14.4		4.7		3.7	
Other Occupations	-0.1		1.5		3.1	
Total	4.5		5.9		5.0	

Source: NOMIS (Nov 2004)

C.38 Comparing the annual rate of wage inflation in Hammersmith & Fulham with Greater London and GB, Table C.15 indicates that most occupations displayed a lower rate of growth. Indeed, for sales occupations and other occupations, wages declined in Hammersmith & Fulham. The major exception to this trend is the substantial growth in plant/machine operatives which increased by 14.4% per annum from £351 in 1991 to £526 by 2002, just £90 below the borough average in this year.

Qualifications

C.39 Table C.16 shows that the resident workforce in Hammersmith & Fulham is very well qualified at Levels 4 and 5 with a low proportion of residents who have no qualifications relative to the London region. Whilst the table conceals the lack of basic qualifications in key communities, it provides an important indication of the need for future job generating activities in the Borough to include a significant proportion of high value-added jobs.

Table C.16 - Qualifications as a % of the Resident Population (2001 Census)

Area	No Qualifications	Level 1	Level 2	Level 3	Level 4/5	Other (Level Unknown)
Hammersmith & Fulham	17.9	7.8	13.2	12.0	45.1	4.1
London	23.7	13.0	17.1	9.8	31.0	5.4

Source: ONS Census 2001 (Nov 2004)

Business Structure

C.40 The total number of business units in Hammersmith & Fulham by broad industrial category is set out in Table C.17 for 1993, 1998 and 2003, including the growth rates over this period.

C.41 The proportion of businesses in the banking, finance and insurance sector in Hammersmith & Fulham increased year on year between 1993 and 2003 averaging 14.1% growth per annum, to account for 45% of the total by 2003. Indeed, this broad sector accounted for the largest proportion of all businesses in Hammersmith & Fulham. Importantly, this includes other business activities which are particularly important to the Borough's economy. Other business activities includes a range of services such as professional services, management consultancy, renting of vehicles and equipment,

software consultancy, repair of office machinery, advertising, industrial cleaning and labour recruitment.

Table C.17 - Business Establishments in Hammersmith & Fulham 1993-2003

Category	1993		1998		2003		Annual % Growth	% Change 1991–2002
	No.	% Of Total	No.	% Of Total	No.	% Of Total		
Manufacturing	306	6.6	595	6.2	589	5.3	6.8	92.5
Construction	157	3.4	279	2.9	264	2.4	5.3	68.2
Distribution, hotels & restaurants	1,463	31.4	2,466	25.8	2,527	22.7	5.6	72.7
Transport and communications	185	4.0	323	3.4	338	3.0	6.2	82.7
Banking, finance & insurance	1,342	28.8	3,538	37.0	5,016	45.0	14.1	273.8
Public admin, education & health	590	12.6	652	6.8	714	6.4	1.9	21.0
Other services	607	13.0	1,700	17.8	1,691	15.2	10.8	178.6
Total	4,666	100	9,574	100	11,148	100	9.1	138.9

Source: Annual Business Inquiry. Total includes agriculture, fishing, energy & water.

C.42 Overall, total business growth in Hammersmith & Fulham averaged 9.1% per annum between 1993 and 2003 compared to 3.9% growth per annum in total employment.

C.43 Tables C.18 and C.19 sets out location quotients for Hammersmith & Fulham businesses (by sector) relative to Greater London and Great Britain. Table C.18 shows that compared to London, Hammersmith & Fulham's business structure is strongly skewed towards over-representation by organisations operating in the banking finance & insurance and other services sectors.

C.44 Relative to the national average, the borough is significantly overrepresented in these sectors, but is underrepresented in key sectors including construction, manufacturing and transport & communications. However, the higher employment representations in the construction and transport & communications categories show that average employment per company is higher in these sectors relative to the national average.

Table C.18 – Business Unit Location Quotients (Hammersmith & Fulham with London)

Broad Category	1993	1998	2003
Manufacturing	0.8	0.9	0.9
Construction	0.8	0.5	0.4
Distribution, hotels & restaurants	1.0	0.9	0.9
Transport & communications	0.9	0.8	0.8
Banking, finance & insurance, etc	1.0	1.0	1.1
Public administration, education & health	1.0	1.0	0.9
Other services	1.5	1.5	1.3

Source: Annual Business Inquiry. Total includes agriculture, fishing, energy & water.

Table C.19 - Business Unit Location Quotients (Hammersmith & Fulham with Great Britain)

Broad Category	1991	1996	2002
Manufacturing	0.6	0.7	0.7
Construction	0.5	0.3	0.3
Distribution, hotels and restaurants	0.9	0.8	0.8
Transport and communications	0.9	0.7	0.7
Banking, finance and insurance, etc	1.3	1.4	1.5
Public administration, education & health	0.9	0.8	0.7
Other services	1.6	1.8	1.7

Source: Annual Business Inquiry. Total includes agriculture, fishing, energy & water.

Business Size

- C.45 Table C.20 highlights the importance of small companies to the Hammersmith & Fulham economy. Indeed in 2003, the number of businesses employing 10 or less people accounted for 88.8% of all businesses in the Borough, compared to a proportion of 80.3% in 1993. This is higher than the proportions in the wider areas of London and Great Britain where business of 10 or less employees accounted for 86.3% and 83.3% of the total in 2003.

Table C.20 – Business Units by Size Band in Hammersmith & Fulham

Employment Band	1993		1998		2003	
	Number	% Of Total	Number	% Of Total	Number	% Of Total
1 to 10	3 747	80.3	8 520	89.0	9 903	88.8
11 to 49	705	15.1	810	8.5	938	8.4
50 to 199	173	3.7	188	2.0	250	2.2
200 or More	41	0.9	56	0.6	57	0.5
Total	4 666	100	9 574	100	11 148	100

Source: Annual Business Inquiry

C.46 Tables C.21 and C.22 highlight that small businesses in Hammersmith & Fulham (those employing 10 people or less) are well represented when compared to London and overrepresented when compared to Great Britain. At the other extreme, large firms (over 200 employees) are of less significance to Hammersmith & Fulham compared to London and the national average. It is particularly important for LDF policies to have regard to the land and property requirements of small businesses (including existing and new businesses).

Table C.21 - Size band Quotients (Hammersmith & Fulham with London)

Employment Band	1993	1998	2003
1 to 10	1.1	1.0	1.0
11 to 49	0.8	0.8	0.8
50 to 199	0.8	0.7	0.8
200 or More	0.8	0.8	0.7

Source: Annual Business Inquiry

Table C.22 – Size band Quotients (Hammersmith & Fulham with Great Britain)

Employment Band	1993	1998	2003
1 to 10	1.1	1.1	1.1
11 to 49	0.7	0.6	0.7
50 to 199	0.8	0.7	0.7
200 or More	0.9	0.8	0.7

Source: Annual Business Inquiry

C.47 Table C.23 provides the industrial breakdown for Hammersmith & Fulham by size band. This highlights the importance of large companies in the financial and business services sector: nearly 32% of firms with over 200 employees are found in this sector. For those employing over 50 employees, the proportions are concentrated in the public administration education & health and distribution hotels & restaurants categories with representations of 24.1% and 21.4% respectively, but again the largest sector is banking, finance & insurance.

Table C.23 – Size Band Proportions by Broad Category (2003)

Sector	1 to 10	11 to 49	50 to 199	200 or More
Manufacturing	5.3	5.1	2.8	10.5
Construction	2.4	2.5	0.8	0.0
Distribution, hotels & restaurants	21.6	34.3	23.2	12.3
Transport & communications	2.7	4.8	6.8	10.5
Banking, finance & insurance, etc	47.4	24.3	31.2	31.6
Public administration, education & health	4.6	20.7	22.4	22.8
Other services	15.9	8.2	12.8	12.3

Source: Annual Business Inquiry

C.48 The tables above highlight that the small business sector has displayed the highest rate of growth over the period 1993-2003 compared to London and the national average. This reflects one of Hammersmith & Fulham's roles in providing a location for major companies.

Enterprise

C.49 Tables C.24 to C.26 set out VAT registrations, deregistrations and the percentage change in net stocks which can be used a proxy for measuring

enterprise activity and business survival rates. The tables show that both new registrations and deregistrations were most significant in the retail / wholesale, real estate and public sector activities. Overall, net registrations have been positive but with significant annual variations.

Table C.24 - VAT Registrations in Hammersmith & Fulham (1995 – 2003)

Industry	1995	1997	1999	2001	2003
Manufacturing	50	70	50	60	55
Construction	35	25	40	40	30
Wholesale & retail	155	130	180	135	165
Hotels & restaurants	55	65	70	55	85
Transport & comms	30	30	25	30	25
Finance	5	15	5	5	10
Real Estate	320	485	525	670	745
Public admin; other	145	140	145	180	125
Education; health	10	15	5	10	20
Total	810	975	1 045	1 185	1 265

Source: VAT Registrations and Stocks

Table C.25 - VAT Deregistrations in Hammersmith & Fulham (1996 – 2002)

Industry	1995	1997	1999	2001	2003
Manufacturing	40	35	35	50	55
Construction	50	35	25	25	30
Wholesale & retail	175	130	115	130	140
Hotels & restaurants	65	50	45	45	60
Transport & comms	25	25	15	20	20
Finance	0	5	5	5	5
Real Estate	195	225	255	440	555
Public admin; other	130	100	115	90	125
Education; health	10	5	10	10	10
Total	690	615	625	820	1 005

Source: VAT Registrations and Stocks

C.50 Table C.26 sets out the percentage change in net stocks in Hammersmith & Fulham between 1995 and 2003. It shows that all categories experienced a net gain between 1995 and 2003. The largest increase in stocks was recorded in the real estate sector which increased by 88%. This reflects the strength of the property market, particularly in London, over the period. The finance and business services experienced a net gain of 38.5%. The retail

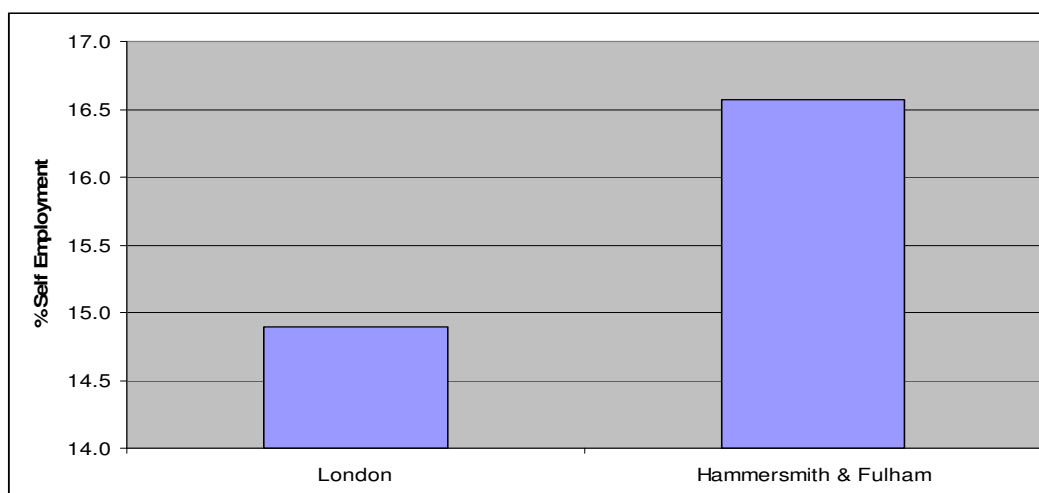
sector recorded a large number of de-registrations over this 5 year period, increasing by just 11.7% this period.

Table C.26 – Percentage Change in Net VAT Stocks in Hammersmith & Fulham (1995-2003)

Industry	1995-1997	1997-1999	1999-2001	2001-2003	1995-2003
Manufacturing	15.0	10.9	3.9	-3.8	27.5
Construction	-11.9	8.1	15.0	8.7	19.0
Wholesale & retail	-1.8	6.3	3.5	3.4	11.7
Hotels & restaurants	4.1	11.7	5.8	7.7	32.4
Transport & comms	10.0	2.3	6.7	8.3	30.0
Finance	23.1	0.0	6.3	5.9	38.5
Real Estate	19.2	27.8	17.0	5.4	88.0
Public admin; other	5.6	7.3	11.0	2.7	29.3
Education; health	11.1	0.0	5.0	19.0	38.9
Total	8.8	14.9	11.1	4.5	45.0

Source: VAT Registrations and Stocks

C.51 The rate and level of self-employment in a local area also provides a broad indication of enterprise activity. Figure C.4 shows that Hammersmith & Fulham has a particularly high rate of self-employment compared to the rest of London. This indicates a greater propensity in terms of entrepreneurial capacity in the Borough. Whilst many self-employed people work from home, a significant number require affordable and flexible premises from which to operate as they expand their businesses. This is particularly the case for small enterprises operating in the creative and cultural sectors, media, ICT and business services. Consequently, the provision of managed / affordable workspace is an important factor in encouraging and supporting local enterprise activity.

Figure C.4 - Self Employment 2001

Deprivation

C.52 The ODPM ranks Hammersmith & Fulham as the 14th most deprived Borough in London (2004 composite index). Table C.27 shows that Hammersmith & Fulham experiences above average deprivation in terms of extent, and local concentration. In terms of income and employment, the borough is in the lower deprivation tier (22nd and 20th out of 33 respectively).

Table C.27 - Deprivation in Hammersmith & Fulham 2004

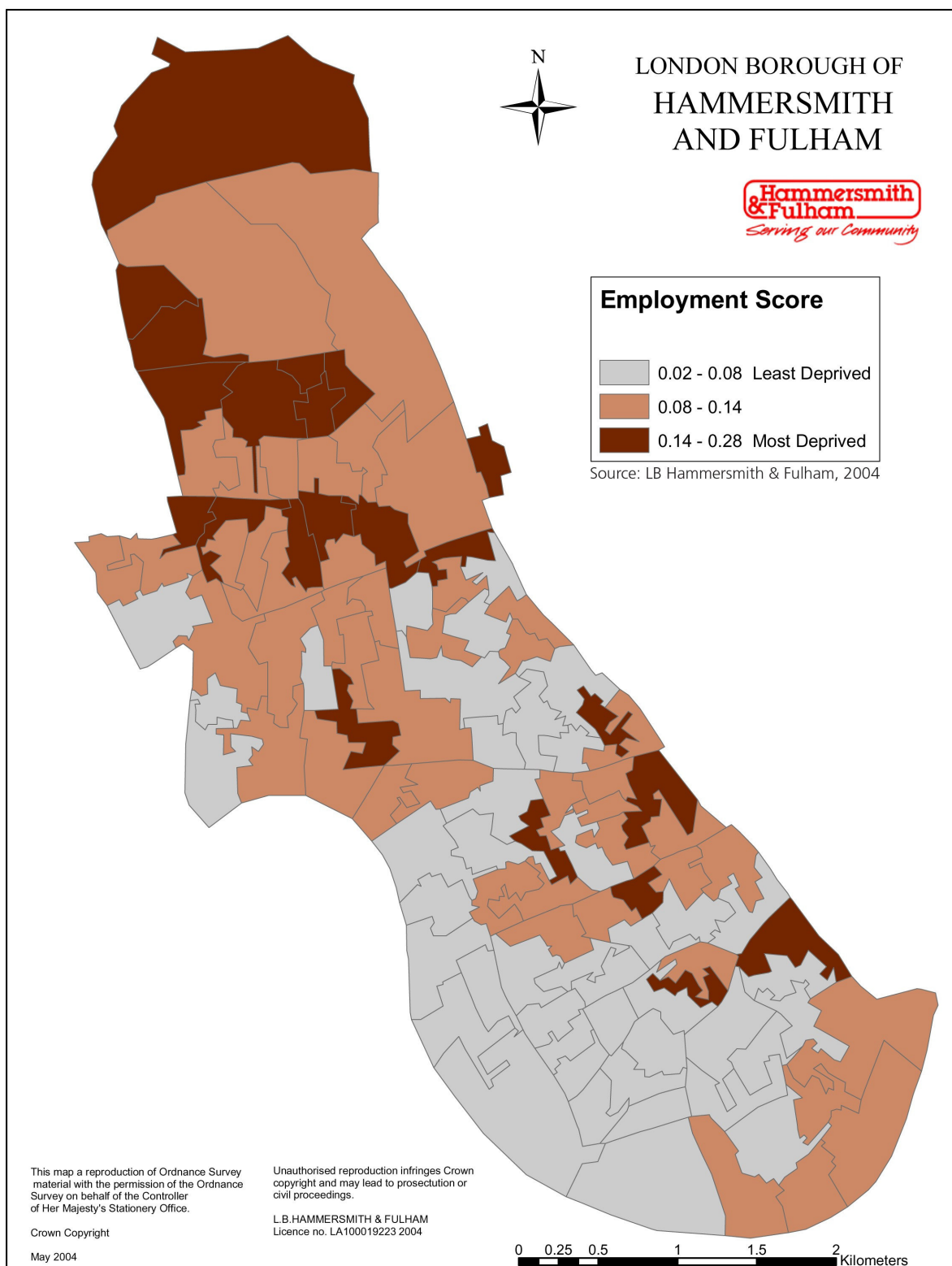
Domain of Deprivation	Rank in London (out of 33)
Composite IMD	14
Extent	14
Local Concentration	14
Income	22
Employment	20

Source: ODPM – Indices of Deprivation (2004)

C.53 Despite Hammersmith and Fulham being in the middle ranks of London's spectrum of deprivation, this conceals the extent to which disadvantage is highly concentrated in a number of key communities. Figure C.5 illustrates the spatial distribution of deprivation in the Borough. This highlights that the following areas are subject to high levels of deprivation relative to the rest of London:

- Wormholt and White City;
- College Park and Old Oak;
- The Coningham Neighbourhood;
- Shepherds Bush town centre;
- Hammersmith town centre; and
- North Fulham.

Figure C.5 – Employment Deprivation in Hammersmith & Fulham 2004



PROPERTY MARKET APPRAISAL

Stock of Employment Premises

Offices

C.54 In 2002/03, LB Hammersmith and Fulham undertook a borough-wide survey of land-uses. Table C.28 shows that the total office stock in the Borough in 2002/03 amounted to 1.154 million sqm. Over the period between 1973 and 2004, LBHF estimate that a total of 680,000 sqm. of new office floorspace was built (excluding developments of less than 300 sqm.). This reflects the growing importance of Hammersmith as a major sub-regional office location over the last three decades.

Table C.28 – Size of Office Establishments and Vacancy Rates 2002/03

Size	Occupied Establishments		Total occupied office floorspace		Vacant Establishments		Total vacant office floorspace	
	No	%	Sqm.	%	No	%	Sqm	%
100 m2 or less	846	41	48,555	5	67	28	3,857	2
101-250 m2	638	31	100,886	11	83	34	13,062	6
251-500 m2	277	13	97,788	10	30	12	10,681	5
501-1,000 m2	160	8	113,295	12	32	13	22,317	10
1,001-5,000 m2	108	5	202,682	22	22	9	38,917	17
5,001-10,000 m2	18	1	126,763	14	4	2	26,941	12
Over 10,000 m2	12	1	243,491	26	4	2	107,873	48
Total	2,057	100	933,560	100	243	100	223,648	100

Source: LBHF, Land Use Survey 2002/03

C.55 Table C.28 shows that most office units in the Borough are small with 41% of all office establishments occupying under 100 sqm. However, these small business occupy only 5% of the Borough's total office floorspace. Conversely, only 1% of office establishments are accommodated in buildings with floorspace of over 10,000 sqm. but together account for 26% of total current supply. The largest organisations occupying office floorspace in the Borough include: BBC, Wood Lane; EMI, Brook Green; Harper Collins, Fulham Place Road; LBHF; Bechtel, Hammersmith Road; Disney, Broadway Centre; and Leo Burnett, Kensington Village.

C.56 The data presented above highlights the diversity of the office market in the Borough and the need for planning policies to distinguish between the different requirements of large and small occupiers. Moreover, planning policies should also give particular emphasis to the changing sectoral structure of occupiers in the Borough. The results of the LBHF land-use survey indicate that:

- (i) Business services is largest sector occupying office floorspace in the Borough. Indeed, the amount of floorspace occupied by firms in the business services sector increased from 155,418 sqm. in 1992 to 208,637 sqm. in 2002/03 (representing an increase of 35%). Moreover, the number of establishments in this sector increased from 460 in 1992 to 719 in 2002/03 (an increase of 56%). This implies that the average size of unit required by business services establishments has declined from 337 sqm. to 290 sqm. over the 10 year period.
- (ii) The media sector (film, TV and radio) is the second largest occupier of offices in the Borough. This sector has experienced a 71% increase in floorspace.
- (iii) Other key office occupiers include primary industries and manufacturing (mainly HQs of manufacturing or oil companies) and finance, legal and accountancy.
- (iv) There have been significant falls in floorspace occupied by building and construction firms and the public administration sector.

C.57 Overall, the office vacancy rate in LBHF is estimated by the land use survey to be approximately 19% (168,441 sqm). However, this conceals a number of important market factors:

- (i) At the time of the survey, 37% of the vacant floorspace was accounted for by two buildings: the Ark and the Empress State, the latter being refurbished and extended at the time. Moreover, there were also a number of large buildings which had been recently completed or were awaiting refurbishment.
- (ii) Vacancy rates are significantly lower for small and medium sized premises (up to 1,000 sqm.). For example, for establishments with

less than 100 sqm, approximately 8% of space was vacant. Conversely, the majority of vacant floorspace is accounted for by establishments with over 10,000 sqm (48% of total vacant floorspace). Moreover, this is accounted for by only 4 buildings / establishments.

- (iii) Nearly three-quarters (74%) of all vacant office floorspace is concentrated in 'stand-alone' offices, with only 26% in mixed-use buildings.
- (iv) Vacancy rates are highest in large volume space built since 1990 (42.6%).

Industrial

- C.58 The LBHF land-use survey indicates that total industrial floorspace in 2002/03 amounted to 168,441 sqm which represents a fall of 33.6% since 1992 (Table C.29). This fall resulted from the change of use to higher-value uses (particularly residential) and the relocation of large occupiers to areas outside of the Borough including British Gas, Osram, Dairy Crest and Prestolite Electric. The latter's premises comprised 19% of the Borough's industrial floorspace and represented the last large-scale industrial occupier in the area.
- C.59 With the relocation of large industrial occupiers from the Borough, the profile of existing tenants reinforces the importance of small business in the area. Indeed in 2002/03, 52% of establishments occupy less than 100 sqm. Conversely, two establishments occupy in excess of 10,000 sqm, which together account for 31% of total floorspace.
- C.60 In terms of industrial vacancies, the 2002/03 land-use survey indicated that the vacancy rate was 12.3% which included the recent relocation of Prestolite. Excluding this site, the vacancy rate was 9% which represents an efficient frictional rate within the industrial market.

Table C.29 – Size of Industrial Establishments 2002/03

Size	Establishments		Total industrial floorspace	
	No	%	Sqm	%
Less than 100 m2	156	52	5,668	3
100-250 m2	46	15	17,270	10
250-500 m2	43	14	15,738	9
500-1,000 m2	26	9	18,453	11
1,000-10,000 m2	26	9	59,896	36
Over 10,000 m2	2	1	51,416	31
Total	299	100	168,441	100

Source: LBHF, Land Use Survey 2002/03

Storage Uses

C.61 The LBHF land-use survey also assessed the existing stock of covered storage and warehousing uses in the Borough. In 2002/03, total floorspace amounted to 254,281 sqm. and has been fairly stable over the last five years. Following the trend in both the office and industrial sectors, over 30% of storage and warehousing establishments occupied less than 100 sqm. Conversely, only three establishments (1%) accounted for 35% of total floorspace.

Table C.30 – Size of Storage & Warehousing Establishments 2002/03

Size	Establishments		Total covered storage floorspace	
	No	%	Sqm	%
Less than 100 m2	91	31	6,293	2
100-250 m2	81	28	13,265	5
250-500 m2	37	13	12,265	5
500-1,000 m2	44	15	31,400	12
1,000-10,000 m2	37	13	102,263	40
Over 10,000 m2	3	1	88,795	35
Total	293	100	254,281	100

Source: LBHF, Land Use Survey 2002/03

C.62 Vacancy rates in the storage and warehousing sector have fallen significantly since 1992, decreasing from 25% to 9%. Current low vacancy rates indicate

that the market is operating efficiently and that demand from consumers and producers for storage and warehousing space is fairly strong

Employment Zones

C.63 The current UDP designates 10 Employment Zones, which together cover 11.5% of the Borough's area. Table C.31 provides a summary of the key findings of the land-use survey for each Employment Zone.

Table C.31 – Commercial and Industrial Property Trends in Employment Zones

Employment Zone	Key Features and Trends
Wood Lane	<p>Largest concentration of office space of all EZs.</p> <p>Fall in office and industrial reflects boundary change.</p> <p>Includes BBC Television Centre and White City Media Village</p> <p>BBC occupies 90% of office space (98,594 sqm.)</p> <p>Dairy Crest recently relocated out of Borough leaving vacant industrial buildings amounting to 10,213 sqm. This accounts for the majority of vacant industrial floorspace in the EZ.</p> <p>Office and warehousing vacancy rates were very low in 2002/03.</p>
Richford Street	<p>Significant loss of industrial and office land to other uses including retail and residential leaving only a small supply of industrial floorspace.</p>
Fulham Reach	<p>Dominated by Hammersmith Embankment office scheme. Consequently, the zone is now almost entirely an office B1 zone.</p>
Kensington Village & Lillie Bridge Depot	<p>Second most important EZ in terms of office provision (includes Earls Court 2 and the Empress State Building).</p> <p>Kensington Village is a complex of office buildings created in several phases from the redevelopment and refurbishment of an older trading estate (including refurbishment of warehousing to offices). Vacancy rates are now low given that the previously vacant Empress State Building has now been let.</p>
Seagrave Road / Rickett Street	<p>Mixture of small office, industrial and storage uses. Provision of office space has increased over the last 10 years from change of use from industrial and warehousing (mostly small scale new build).</p>
Carnwath Road	<p>Includes industrial estates at the Sullivan Centre and Hurlingham Business Park and a variety of commercial units on Carnwath Road. Increase in office space since 1992 but significant drop in industrial floorspace following conversion of British Gas research space to residential. Some industrial space has also since been reclassified as offices.</p>
Putney Bridge	<p>Mix of small and large premises in a variety of uses. Increase in provision of small B1 units and serviced suites (e.g. Riverbank House). Loss of some office floorspace to other uses (e.g. Halliburton House converted to hotel).</p>
Hammersmith Road / Olympia	<p>Major office blocks including Colet Court, Olympia and former National Savings Bank building. Vacancy rate approximately 15% but accounted for by only 5% of units (3 buildings).</p>
Townmead Road / Imperial Road	<p>Consists mostly of ex British Gas land in Imperial Road and round the riverside in Townmead Road.</p> <p>Much of the land has gone to the Imperial Wharf proposal, which is largely residential but contains some office uses. Some British Gas buildings in the north west of the EZ have been converted to a variety of studio, industrial,</p>

Employment Zone	Key Features and Trends
	office and storage uses. The EZ includes the Townmead Business Centre (38 starter premises). Large amounts of former industrial last converted to residential and high value leisure activities.
Hythe Road	Largest EZ and most significant industrial and warehousing area remaining the Borough. Includes the Great Trade Centre (car retail centre) which resulted from the conversion of industrial premises including the former Rolls Royce factory on Hythe Road. Vacancy rates are low for industrial, storage/warehousing and offices at 1%, 4% and 9% respectively.

Source: LBHF, Land-Use Survey 2002/03

Current vacancies¹²

- C.64 Tables C.32 and C.33 set out the current levels of vacant office and industrial / warehousing floorspace in Hammersmith and Fulham. This data is taken from records provided by the West London Business premises database.
- C.65 Table C.32 shows that there is approximately 654,000 sq.ft (65,000 sqm) of vacant office space on the market. Over half of this is concentrated in Hammersmith where approximately 28 premises are on the market. These units are also, on average, significantly larger than the average size of all vacant premises. Fulham provides the other main focus for office vacancies with around 150,000 sq.ft of floorspace on the market. The rental levels being asked in both Fulham and Hammersmith are higher than that of other office locations in the Borough.

¹² It should be noted that the WLB register does not contain 100% of industrial and commercial property on the market at any one time. In addition, it should be highlighted that some property on the market are not always vacant and ready for occupation as premises may be advertised in advance of becoming vacant (e.g. before business relocations or during refurbishment).

Table C.32 – Vacant Office Floorspace on the Market by Location (2005)

Post Code / Area	Total Vacant Floorspace (sq.ft)	Average Rent (£ / sq.ft)	No. of Premises on Market	Average Size of Premises (sq.ft)
SW10 (Sands End)	1,165	N/A	1	1,165
SW6 (Fulham)	142,927	20.39	53	2,697
W12 (Shepherd's Bush)	88,777	13.45	11	8,071
W14 (West Kensington)	96,801	19.19	11	8,800
W6 (Hammersmith)	324,425	30.02	28	11,587
Total	654,095	24.82	104	6,289

Source: West London Business / Atkins 2005. Note: Excludes serviced offices.

C.66 Table C.33 provides vacancy data for industrial and warehousing premises. With only 35,200 sq.ft vacant floorspace, the West London Business database indicates that the market is operating fairly tightly in Hammersmith and Fulham. Clearly, the scale of industrial and warehousing vacancies is significantly lower than that for offices. Moreover, around 65% of vacant floorspace is concentrated in seven premises in Fulham / SW6.

C.67 The average size of vacant industrial / warehousing premises on the market (2,517 sq.ft) is significantly less than that for offices (6,289 sq.ft). This implies strong demand for relatively small units for both office and industrial accommodation.

Table C.33 – Vacant Industrial Floorspace on the Market by Location (2005)

Post Code / Area	Total Vacant Floorspace (sq.ft)	Average Rent (£ / sq.ft)	No. of Premises on Market	Average Size of Premises (sq.ft)
NW10 6 (Old Oak Common)	4,342	9.83	4	1,086
SW6 (Fulham)	23,072	10.77	7	3,296
W12 (Shepherd's Bush)	1,520	23.03	1	1,520
W6 (Hammersmith)	6,298	16.00	2	3,149
Total	35,232	12.95	14	2,517

Source: West London Business / Atkins 2005

B1 / Office Commitments

C.68 Tables C.34 to C.37 demonstrate that the Borough performs a strategic role as a location for prime office occupiers. Indeed, Hammersmith town centre has a strong track record in attracting international occupiers. Speculative office development has been prominent activity in the town centre and is likely to become viable again in the short term. This role may extend to other parts of the Borough as high profile developments become available. Implementation of the White City development framework is likely to provide an important opportunity for strengthening the strategic office role of Hammersmith and Fulham.

Table C.34 - B1 / Office Property Market Indicators – Hammersmith & Fulham

Indicator	H&F	Source
Gross Avg B1 land take-up (ha per annum 87-02)	1.94	LBHF
Gross Avg B1 floorspace take-up (sqm per annum 73-02)	20,500	LBHF
Gross Avg B1 floorspace take-up (sqm per annum 87-02)	25,100	LBHF
Prime Rents (£/sq.ft.)	£25-£30	CBRE

Source: LBHF – Research Note 1/03 (excludes developments under 300 sqm). / London Policy Office Review, 2004

C.69 Development monitoring systems held by LBHF indicate that nearly 600,000 sqm. of B1 floorspace has been completed in the Borough in the 29 year period between 1973 and 2002 (excluding developments less than 300 sqm). Of this, approximately 377,000 sqm. was developed between 1987 and 2002. This floorspace was developed on a total land area of 29 hectares which implies an average plot ratio of nearly 130%.

Table C.35 – Gross Office / B1 Completions in LBHF Jan 73 – June 87

Area	Speculative (sqm)	Pre-let (sqm)	Total (sqm)	Land (ha)
North	7,245	3,170	10,415	N/A
Central	59,470	116,305	175,775	N/A
South	27,470	4,975	32,445	N/A
Total	94,185	124,450	218,635	N/A

Source: LBHF, Research Note 1/03

Table C.36 – Gross Office / B1 Completions in LBHF June 87- Jan 03

Area	Speculative (sqm)	Pre-let (sqm)	Total (sqm)	Land (ha)
North	24,086	44,985	69,071	9.22
Central	155,844	31,150	186,994	10.41
South	105,746	15,115	120,861	9.85
Total	285,676	91,250	376,926	29.12

Source: LBHF, Research Note 1/03

C.70 Tables C.35 and C.36 show the scale of take-up of B1 floorspace in Hammersmith & Fulham between 1973 and 2002 (and land take-up from 1987). It can be seen that over the last 15 years, speculative office development has increased significantly compared to the previous 14 years. This reflects the office property boom of the late 1980s and the strengthened role of Hammersmith as a strategic location for large, prime office occupiers.

C.71 Whilst central parts of the Borough (including Hammersmith town centre) have accounted for the largest proportion of B1 development, the tables also demonstrate how over time, the northern and southern parts of the Borough have increased their role in accommodating office development. This is particularly the case in the south of the Borough which includes Sands End, Fulham Broadway, North End and Fulham Reach.

C.72 Whilst the average plot ratio for developments completed between 1987 and 2002 was approximately 130%, the density of development varies within the Borough. As would be expected in the prime office locations such as Hammersmith town centre, the average plot ratio in the central part of the Borough was 180%. This compares to 75% in the north and 127% in the south.

Table C.37 - Local Property Market Conditions within Hammersmith & Fulham

Location in H&F	Residential (Cap Value £/sq.ft)	Retail (Zone A £/sq.ft)	Offices Rent & Cap Value £/sq.ft	Industrial
Sands End	£600-650	£25 (Imperial Wharf)	£20-25 £250-325 @7.5%	£10-12
Fulham	£500-550	£100 (Fulham Broadway)	£15-20 £200-250 @ 7.5%	N/A
Hammersmith Centre	£450-500	£100 (Kings Street)	£25-30 £325-375 @ 7.5%	N/A
Shepherds Bush	£350-400	£70 (Shepherds Bush Green)	£15-20 £200-250 @ 7.5%	£8-10
White City	£350-400	N/A	£15-20 £200-250 @ 7.5%	£8-10

Source: London Office Policy Review (LOPR) & Mixed Use Development and Affordable Housing, GLA 2004

C.73 Table C.37 indicates that residential values exceed offices in all locations in the Borough which highlights the pressure for employment land to be redeveloped for housing even when sites are suitable and viable for employment purposes. Consequently, it is appropriate for the LBHF to take a strong approach to ensuring that the stock of key employment sites is not substantially diminished by this process. At the same time, it is important that the qualitative needs of modern industrial and business occupiers are provided for by proactive economic development policies.

APPENDIX D

Business Survey Proforma

D. BUSINESS SURVEY PROFORMA

Hammersmith & Fulham Business Survey

Good morning/afternoon/evening. My name is _____ and I'm calling from _____, an independent market research company. We are currently working for the London Borough of Hammersmith & Fulham and are keen to find out your views on local business needs and how local businesses will function over the next 10 years.

*Find appropriate person to speak to (MD/director/owner)
If not convenient time, arrange appointment for call-back.
If do not have required information to hand, send fax through sheet.*

Please can you confirm the postcode of the business?
Verify postcode according to that shown on sample sheet. Amend below if necessary.

--	--	--	--	--	--	--	--	--

Overview of business

First of all, I'd like to ask you some general questions about the business...

Ask all

A1

Please can you confirm that your business activity is
Read out Experian Classification Description.

A2

Under what sort of ownership is the business held. Is it a:

Read out

- a) Sole trader
- b) Partnership
- c) Limited company
- d) Other

Ask all

A3

On what basis do you occupy your premises. Is it :

Read out

- a) Freehold (Go to A5)
- b) Leasehold (Go to A4)
- c) Licence (Go to A4)
- d) Other (Go to A5)

Ask A4 only if respondent answers 'b' or 'c' at A3. All others go to A5.

A4

How many years remain on your existing lease/licence?

_____ (write in)

Ask all

A5

How long has this business been established in Hammersmith & Fulham?

_____ (write in)

A6

Roughly how much floor space do your premises occupy? (write in)

_____ sq. metres OR _____ sq. feet

A7

What proportions of floor space are dedicated to the following uses:

Read out categories. Write in percentages. Ensure percentages total 100%.

- | | |
|------------------------------|---------|
| a) Office activities | _____ % |
| b) Production | _____ % |
| c) Studio/flexible workspace | _____ % |
| d) Warehouse/storage | _____ % |
| e) Showroom | _____ % |
| f) Vacant | _____ % |
| g) Other (specify) _____ | _____ % |
| Sum = 100% | |

A8

Roughly how much open yard space (if any) is there at your premises?

_____ sq.metres OR _____ sq. feet

None

Employment

And now I'd like to ask you about employment within the business...

Ask all

B1

How many full-time and part-time staff (including yourself) does your business employ at this site?

Read out. Write in numbers

- | | |
|--------------|-------|
| a) Full-time | _____ |
| b) Part-time | _____ |

B2

I'm going to read you a number of levels of employment. Please tell me what proportion, or how many, of your workforce falls into each of the categories.

Read out categories. Write in percentages. Assist respondent in working out percentage split. If unable to calculate %, write in actual number of staff, ensuring total equals that disclosed in B1.

a) Managerial	_____ %	or	No. _____
b) Technical/professional	_____ %	or	No. _____
c) Skilled	_____ %	or	No. _____
d) Semi-skilled	_____ %	or	No. _____
e) Unskilled	_____ %	or	No. _____
f) Clerical/administrative	_____ %	or	No. _____
Sum = 100%			Sum = total in B1

B3a

Approximately, how many of your staff live within the London Borough of Hammersmith & Fulham?

Write in percentage or number of staff. If number, ensure this is not greater than the total number of staff employed at the site (B1).

Percentage: _____% or No.: _____

B3b

Approximately, how many of your staff live within a five mile radius of your site?

Write in percentage or number of staff. If number, ensure this is not greater than the total number of staff employed at the site (B1).

Percentage: _____% or No.: _____

B4

Can you tell me, approximately, the proportion or number of staff who use the following means of transport for the main part of their journey?

Write in percentage or number of staff. If number, ensure this is not greater than the total number of staff employed at the site (B1).

	Percentage	or	No.
Bus:	_____		_____
Tube / Train	_____		_____
Cycle	_____		_____
Walk	_____		_____
Car	_____		_____

B5a

Does the business suffer from any skills shortages?

- a) Yes (Go to B5b)
b) No (Go to next section)

Ask B5b and B5c only if respondent answers 'a' at B5a. All others go to next section.

B5b

What type of skills shortages are these?

Read out categories. Code all that apply.

- a) Managerial
b) Technical/professional
c) Skilled
d) Semi-skilled
e) Unskilled

- f) Clerical/administrative
- g) Other (*specify*) _____

B5c

Will your company be using any of the following initiatives to address this issue of skill shortages?

Read out. Code all that apply

- a) General computer training courses
- b) Specific computer training courses (please specify) _____
- c) Management training courses
- d) Team working initiatives
- e) Inter-personal skills training
- f) Literacy training courses
- g) Numeracy training courses
- h) Other (*please specify*) _____

Input and Output

The next questions concern the business' suppliers, customers, turnover and business premises costs...

Ask all

C1

Where are your suppliers based? Please tell me what percentages of your suppliers are located in each of the following areas:

Read out categories. Write in percentages Ensure percentages total 100%.

- a) In Hammersmith & Fulham _____ %
- b) Rest of London _____ %
- c) Rest of the South East _____ %
- d) Nationally _____ %
- e) Internationally _____ %

Sum = 100%

C2

And where are your customers based? Please tell me what percentages of your customers are located in each of the following areas:

Read out categories. Write in percentages Ensure percentages total 100%.

- a) In Hammersmith & Fulham _____ %
- b) Rest of London _____ %
- c) Rest of the South East _____ %
- d) Nationally _____ %
- e) Internationally _____ %

Sum = 100%

C3

Which one of the following bands covers the approximate value of your business' turnover last year?

*Read out. Code **one** response only.*

- a) up to £100,000
- b) 100,000-250,000
- c) 250,000-500,000

- d) 500,000-1million
- e) 1million to 1.5million
- f) 1.5million to 2million
- g) 2 million to 5million
- h) 5 million to 10 million
- i) more than 10 million
- j) Refused/don't know

C4

Excluding rates, approximately what **proportion** of the business turnover do you spend on business accommodation costs?

*Interviewer: this should include any rent or mortgage payments, maintenance and insurance costs, but **exclude rates***

_____ % (Write in)

*Ask C5 and C6 to those who do **not** occupy their premises on a Freehold basis (i.e. only ask those who answered 'b', 'c' or 'd' at A3). All others go to the next section.*

C5

If you rent your premises, approximately how much do you currently pay for your business premises?

£ _____ per sq. metre

£ _____ per sq. foot

£ _____ per month

£ _____ per year

Don't know

Not applicable

C6

Given your location and the quality of your business premises, how would you rate your current rental levels/business premises costs?

- a) Good value for money
- b) Fair Value for money
- c) Poor Value for money
- d) Other (Specify) _____

Expansion

The next few questions concern your future plans...

D1

Are you planning to expand the business in the next 10 years?

If respondent is unable to consider the next 10 years, ask question for the 'short term future'.

- a) Yes (Go to D2)
- b) No (Go to next section)
- c) Don't know (Go to next section)

Ask D2 only if respondent answers 'a' to D1. All others go to next section

D2

Which of the following areas are you planning to invest in?

Read out. Code all that apply.

- a) New plant (Go to D4)
- b) New machines (Go to D4)
- c) Additional staff (Go to D3)
- d) Other _____ (specify) (Go to D4)

Ask D3 only if respondent answers 'c' to D2. All others go to D4.

D3

How many full-time and part-time staff do you envisage taking on?

Read out. Write in numbers

- a) Full-time _____
- b) Part-time _____

D4

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

- a) Yes (Go to D5)
- b) No (Go to next section)
- c) Don't know (Go to next section)

Ask D5-7 only if respondent answers 'a' at D4. All others go to next section.

D5

Roughly how much **additional** floor space do you think you will need?

_____ square feet/
_____ square metres

D6

Could this additional floor space be provided on your current site through the following measures?

Read out. Code all that apply.

- a) Extension
- b) Refurbishment
- c) Redevelopment
- d) More intensive use of existing space
- e) None of the above
- f) Don't know

D7

Have you contacted the Council with a proposal to extend or redevelop your premises?

- a) Yes (Go to D8)
- b) No (Go to next section)

Ask D8 only if respondent answers 'a' at D7. All others go to next section.

D8

And what was the outcome of this?

Write in. Probe fully

Relocation

Ask all

E1

Have you ever considered relocating from your current premises?

- a) Yes (Go to E2)
- b) No (Go to next section)

Ask E2-E5 only if respondent answers 'a' at E1. All others go to next section.

E2a

To which of the following locations have you considered relocating?

Read out. Code all that apply.

- a) Elsewhere in Hammersmith & Fulham
- b) In the surrounding area/boroughs
- c) Elsewhere in London
- d) Outside London
- e) To a specific location _____ (specify location)

E2b

To what type of location would you prefer to relocate?

Read out. Code all that apply

- a) Dedicated Industrial Area
- b) Residential Area
- c) Town centre / commercial district
- d) Mixed use area
- e) Other (please specify) _____

E3

What are your main reasons for relocating?

Do **not** read out. Code first three mentions only. (Ensure response relates to Hammersmith & Fulham, e.g. if respondent says 'cheaper council tax in X' this should be coded as (a))

- a) High business rates
- b) High rents
- c) High security costs
- d) Traffic congestion
- e) Poor access
- f) Poor public transport
- g) Poor signage
- h) Site/premises too small
- i) Premises in poor condition
- j) Poor skills base
- k) Limited labour available
- l) To be closer to suppliers
- m) To be closer to customers
- n) Poor image
- o) Poor public realm (e.g. street lighting/furniture, pavements, landscaping)
- p) Poor local facilities/amenities
- q) Lack of car parking provision
- r) Other (specify) _____

E4

How much floor space do you think you will need for each of the following uses?

Read out uses. Record amount of space required for each, including 'None' where no space is required for a particular use. Calculate total floor space required.

	Sq Metres	Sq Feet	DK	None
a) Office Space	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
b) Production workspace	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
c) Studio/flexible workspace	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
d) Warehouse/storage	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
e) Showroom	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
f) Other (specify).....	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
g) Total floor space required	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

E5

Is this type of premises available within Hammersmith & Fulham?

Code one answer only

- a) Yes
- b) No
- c) Don't know

The Borough of Hammersmith & Fulham

Ask all

F1

How do you see Hammersmith & Fulham as a business location? Do you think it is:

Read out. Code one answer only.

- a) A good location *(Go to F2, then go to F5)*
- b) A poor location *(Go to F3, F4 & F5)*
- c) Neither good nor poor *(Go straight to F5)*
- d) Good in some ways, poor in others *(Go to F2, F3, F4 & F5)*

Ask F2 only if respondent answers 'a' or 'd' at F1.

F2

What aspects do you consider to be good?

*Do **not** read out. Code most appropriate responses & all that apply*

- a) Low business rates
- b) Low rents
- c) Low overall costs
- d) Good labour supply
- e) Good local skills base
- f) Network of contacts
- g) Good quality land/premises
- h) Good transport/access arrangements
- i) Good signage
- j) Low crime rate
- k) Little traffic congestion
- l) Good public transport
- m) Good car parking
- n) Local suppliers

- o) Local customer base
- p) Good image for businesses
- q) Good public realm (e.g. street lighting/furniture, pavements, landscaping)
- r) Good local facilities/amenities
- s) Local cultural scene
- t) Other (specify) _____

Ask F3 & F4 only if respondent answers 'b' or 'd' at F1

F3

What aspects do you consider to be poor?

Do **not** read out. Code most appropriate responses & all that apply

- a) High business rates
- b) High rents
- c) High overall costs
- d) Poor labour supply
- e) Poor local skills base
- f) Little local networking
- g) Poor quality land/premises
- h) Poor transport/access arrangements
- i) Poor car parking provision
- j) Poor signage
- k) High crime rate
- l) Traffic congestion
- m) Poor public transport
- n) Few local suppliers
- o) Few local customers
- p) Poor image for businesses
- q) Poor public realm (e.g. street lighting/furniture, pavements, landscaping)
- r) Poor local facilities/amenities
- s) Other (specify) _____

F4

Are these factors significant enough to make you leave Hammersmith & Fulham?

- a) Yes
- b) No
- c) Don't know

Ask all

F5

Is there anything the Borough of Hammersmith & Fulham could do to help your business operate more effectively?

- a) Yes (Go to F6)
- b) No (Go to F7)
- c) Don't know (Go to F7)

Ask F6 only if respondent answers 'a' at F5. All others go to F7.

F6

What would you like to be done?

Do **not** read out. Code the most appropriate responses & all that apply

- a) Reduce taxes
- b) Reduce rents

- c) Improve image of Borough
- d) Improve public realm (e.g. street lighting/furniture, pavements, landscaping)
- e) Reduce crime
- f) Improve public transport
- g) Improve car parking provision
- h) Improve access
- i) Reduce traffic congestion
- j) Increase availability of land and premises
- k) Increase availability of labour
- l) Other(specify)_____

Ask all

F7

Are there any additional comments you would like to make regarding local business needs in Hammersmith & Fulham?

Yes:_____

Ask all

F8a

Are you aware of the council's business support services?

- a) Yes (Go to F8b)
- b) No (Go to F8c)

Ask F8b only if respondent answers 'a' at F8a. All others go to F8c.

F8b

Have you ever used the council's business support services?

- a) Yes
- b) No

Ask all

F8c

Are you aware of the West London Businesses programme to assist businesses to find premises locally?

- a) Yes (Go to F8d)
- b) No (Go to next section)

Ask F8d only if respondent answers 'a' at F8c. All others go to next section.

F8d

Have you ever used the West London Businesses services to find premises?

- a) Yes
- b) No

Ethnicity

G1

And finally, please tell me how you would describe the ethnic origin of the owner(s) of this business?

Ensure respondent understands you are asking about the owner rather than him/herself. If business is owned by 1+ people, record ethnic origin of each owner.

Do **not** read out. Prompt to obtain complete response – e.g. If response is ‘White’, ask ‘Is that White – British, Irish, Cypriot, Greek Cypriot, Turkish Cypriot, Kurdish or another ethnicity?’

- a) White – British
- b) White – Irish
- c) White – Turkish / Turkish Cypriot
- d) White – Greek / Greek Cypriot
- e) White – Kurdish
- f) White – Other
- g) Mixed – White and Black Caribbean
- h) Mixed – White and Black African
- i) Mixed – White and Asian
- j) Mixed - Other
- k) Asian / Asian British – Indian
- l) Asian / Asian British – Pakistani
- m) Asian / Asian British – Bangladeshi
- n) Asian / Asian British - Other
- o) Black / Black British – Caribbean
- p) Black / Black British – African Somali
- q) Black / Black British – African Eritrean
- r) Black / Black British – African Nigerian
- s) Black / Black British – African Ghanaian
- t) Chinese
- u) Filipino
- v) Vietnamese
- w) Any other ethnic group
- x) Refused

Record contact details for quality assurance purposes

Thank respondent and close.

APPENDIX E

Business Survey Results

E. BUSINESS SURVEY RESULTS

INTRODUCTION

- E.1 Atkins was employed by the London Borough of Hammersmith and Fulham in October 2004 to undertake an employment study to inform the preparation of the Hammersmith and Fulham Local Development Framework (LDF) and to provide a robust evidence base to support the emerging policies.
- E.2 This report sets out the outcomes of the business survey which has been undertaken to inform the study and which will be used to develop employment land policies for the Borough. It is set out across the following sections:
- Background to Report and Methodology: outlines the adopted methodology of the London Borough of Hammersmith and Fulham Business Survey;
 - Business Characteristics: provides an analysis of the business characteristics of the firms involved in the study;
 - Business Premises Information: provides analysis with regards to the business premises in Hammersmith and Fulham;
 - Local Linkages: includes information regarding travel to work travel patterns, supplier linkages, customer linkages and business organisation / association;
 - Expansion and Relocation Plans: provides information regarding areas of investment, type of expansion, and issues associated with relocation; and
 - Perceptions of Hammersmith and Fulham as a Business Location: provides a summary of the various factors affecting business in the Borough.

METHODOLOGY

- E.3 A survey of Hammersmith and Fulham's indigenous businesses was undertaken in order to provide an insight into the functioning of the local economy.
- E.4 The main objective of this element of the study was to provide information on indigenous businesses not readily available from secondary sources. The topics included:
- Type of ownership;
 - Land and premises requirements;
 - Type of employment and skills;
 - Location of suppliers and customers;
 - Turnover;
 - Future plans, including expansion, relocation, and investment;
 - Perceptions of Hammersmith and Fulham as a business location;
 - Business support; and
 - Awareness of the Council's Unitary Development Plan (UDP).
- E.5 This information was collected through a series of 15 minute telephone interviews with 250 businesses¹³ in the Borough.

Survey Process

- E.6 The telephone surveys were conducted in November 2004¹⁴.
- E.7 Interviews were conducted with managers, directors, owners or partners, of 250 businesses located in the Borough of Hammersmith and Fulham.
- E.8 The survey sample was stratified businesses into nine different industry sectors consistent with the Standard Industrial Classification. These were:
- Banking, Finance and Insurance;
 - Construction;
 - Consultancy Services

¹³ 250 interviews were achieved

¹⁴ Interviews were conducted by a team of experienced market research interviewers from *Hill Taylor Partnership*

- Distribution and Wholesale;
- Legal, Accounting, Advertising and Recruitment
- Manufacturing;
- Other Business Services;
- Other Services; and
- Transport and Communications.

Survey Sample

- E.9 Sample was initially drawn from the Yellow Pages/Experian and grouped according to the SIC code/Yell Classification Description.
- E.10 A sample frame of 3,898 business details and telephone numbers was supplied to the fieldwork agency.
- E.11 Quotas were set in order that each industry sector was represented. Quotas were based on the universal split of the Borough's businesses between these six industry sectors. A secondary quota was also established in order to achieve representative proportions of interviews with businesses of different sizes¹⁵.

Survey Outputs

- E.12 The remainder of this report details the main findings from the telephone surveys. The results shown here are unweighted, although extrapolation of the results of some key questions has been undertaken so as to represent the whole Borough. All findings have been analysed by industry sector and size, in terms of the number of employees¹⁶.
- E.13 In each of the tables, results are shown as both the number of responses in each sub-group (industry sector or size) and as a percentage of each sub-group. However, caution must be taken when regarding the percentage figures due to small sample sizes of some of the sub-groups.
- E.14 The total number of interviews achieved in each industry sector is shown in Table E.1, while Table E.2 illustrates the number of interviews achieved with different sized businesses

¹⁵ This quota was based on the number of employees (1 to 10, 11 to 49 and 50 and above)

¹⁶ This information has been based on the existing structure of the Borough as per the ABI.

Table E.1 - Industry Sector

Industry Sector	No. Interviews	Percentage of Total
Manufacturing	20	8.0
Construction	9	3.6
Distribution and Wholesale	23	9.2
Transport and Communications	11	4.4
Banking, Finance and Insurance	39	15.6
Consultancy Services	40	16.0
Legal, Accounting, Advertisement and Recruitment	24	9.6
Other Business Services	40	16.0
Other Services	44	17.6
Total	250	100.0

Base: all businesses (250)

Table E.2 - Size of Business

Number of Employees	No. Interviews	Percentage of Total
1 to 4	207	82.8
5 to 10	22	8.8
11 to 49	15	6.0
50 or more	6	2.4
Total	250	100

Base: all businesses (250)

BUSINESS CHARACTERISTICS

E.15 This section sets out trends in the characteristics of all businesses surveyed including, ownership details, employee details, employment change, skills shortages and turnover.

OWNERSHIP

E.16 58.4% of respondents stated that their business was a “limited company” (either Private or Public Limited). 27.2% were “sole traders” and 9.6% were “partnerships”.

E.17 Businesses in the Transport and Communications sector were most likely to be “sole traders” (45.5%), whilst legal, accountancy, advertisement and recruitment firms were most likely to be limited companies (74.4%).

Table E.3 - Type of Ownership

I Industry Sector	Ownership Type							
	Sole Trader		Partnership		Limited Company		Other	
	No.	%	No.	%	No.	%	No.	%
Manufacturing	5	25.0	3	15.0	11	55.0	1	0.4
Construction	2	22.2	1	11.1	6	66.7	0	0
Distribution and Wholesale	8	34.8	3	13.0	12	52.2	0	0
Transport and Communications	5	45.5	1	9.1	4	36.4	1	0.4
Banking, Finance and Insurance	7	17.9	1	2.6	29	74.4	2	0.8
Consultancy Services	10	25.0	5	12.5	24	60.0	1	0.4
Legal, Accounting, Advertisement and Recruitment	5	8.5	1	4.2	16	66.7	2	0.8
Business Services	12	20.8	7	17.5	20	50.0	1	0.4
Other Services	14	31.8	2	4.5	24	54.5	4	1.6
Total	68	27.2	24	9.6	146	58.4	12	4.8

Base: all businesses (250)

No. Employees	Ownership Type							
	Sole Trader		Partnership		Limited Company		Other	
	No.	%	No.	%	No.	%	No.	%
1 to 4	64	30.9	23	11.1	114	55.1	6	2.4
5 to 10	3	13.6	1	4.5	15	68.2	3	1.2
11 to 49	1	6.7	0	0	14	93.3	0	0
50+	0	0	0	0	3	50.0	3	1.2
Total	68	27.2	24	9.6	146	58.4	12	4.8

Base: all businesses (250)

E.18 “Limited companies” are prolific across all sizes of firm, although “sole traders” made up a large proportion of smaller companies with 1 to 4 employees (30.9%).

E.19 Each business was asked to express how many owners belonged to each firm. The results in Table E.3 show that of those businesses that answered (62) most businesses have a single ownership (45.2%). Multiple ownership of over 5 members is the lowest ownership type (1.6%).

Table E.4 – Tell me How Many are owners of this Business

Number of Owners ¹	No.	Percentage of Total
1	28	45.2
2	21	33.9
3	4	6.5
4	2	3.2
5+	1	1.6
Don't Know/ N/A	6	9.7
Total	62	100

Base: the total number of owners for the 250 businesses in the survey (62)

Ethnicity of Company Owners

E.20 Table E.5 shows the ethnic origin of company owner(s). It illustrates that whilst the majority of owners are White –British (71.3%) a large proportion are of other descents. Respondents stated that their company owners belonged to a wide range of different ethnic groupings and 11 different non-British

ethnic origins were stated. White – Other was one the most stated non-British origin, making up 12.2% of first owners.

Table E.5 - Ethnic Origin of Owner(s)

Ethnic Origin	No.	% ¹⁷
White – British	239	71.3
White – Irish	5	1.5
White – Turkish / Turkish Cypriot	1	0.3
White – Greek / Greek Cypriot	0	0
White – Other	41	12.2
Mixed race – White and Black Caribbean	2	0.6
Mixed race – White and Black African	0	0
Mixed race – White and Asian	1	0.3
Mixed Race – Other	0	0
Asian – British Asian – Indian	11	3.3
Asian – British Asian Pakistani	0	0
Asian – British Asian - Bangladeshi	0	0
Asian – Other Asian	2	0.6
Black British – Caribbean	3	0.9
Black British – African Somali	2	0.6
Chinese	1	0.3
Any other ethnic group	5	1.5
Don't Know	22	6.6
Total	335¹⁸	100

Base: all businesses (212 responses, 38 responses missing)

EMPLOYMENT

E.21 Respondents were asked to say how many full and part-time staff their business currently employs. As Table E.6 shows, over two-thirds (77.2%) of businesses surveyed employ between one and five full-time staff. Few businesses employ over 50 full-time employees (1.6%), though all have at least one full-time member of staff.

E.22 Firms in consultancy services and other business services sector are most likely to employ large numbers of full time staff. 5% of firms in this sector employ over 51 full time members of staff compared to an average of 0%.

¹⁷ These percentages are based on all business (250).

Firms in transport and communications are also likely to recruit relatively large numbers of full-time staff. 18.2% of firms in this sector employ an average of 21-50 people.

E.23 Firms in the construction sector are least likely to employ large numbers of full time staff. 89.7% of firms in the sector employ between 1 and 5 members of full time staff.

Table E.6 - Number of Full-time Employees

Industry Sector	Number of Full-Time Employees									
	1-5		6-10		11-20		21-50		51+	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	15	75.0	2	10.0	1	5.0	2	10.0	0	0
Construction	8	89.7	1	11.1	0	0	0	0	0	0
Distribution and Wholesale	15	65.2	4	17.4	2	8.7	2	8.7	0	0
Transport and Communications	7	63.6	1	9.1	1	9.1	2	18.2	0	0
Banking, Finance and Insurance	28	71.8	6	15.4	2	5.1	3	7.7	0	0
Consultancy Services	30	75.0	7	17.5	1	2.5	0	0	2	5.0
Legal, Accounting, Advertising and Recruitment	19	79.2	2	8.3	2	8.3	1	4.2	0	0
Other business Services	34	85.0	2	5.0	1	5.0	1	2.5	2	5.0
Other Services	37	84.1	4	9.1	1	9.4	2	4.5	0	0
Total	193	77.2	29	11.6	11	11.6	13	5.2	4	1.6

Base: all businesses (250)

¹⁸ The total number of ethnic groups mentioned. If business has more than one owner, the ethnicity of each owner was requested, so the sum exceeds 250.

E.24 Table E.7 illustrates that 73.6% of all companies surveyed had no part-time employees in their workforce. Firms most likely to employ part time staff were in the Legal, Accounting, Advertising and Recruitment sector (37.5%) and the construction sector (33.3%). Three firms, (one of each in each of the following sectors: manufacturing, banking and “other” services), employed 6-10 employees, the only respondents in this category.

Table E.7 – Number of Part-time Employees

Industry Sector	Number of Part-Time Employees					
	0		1-5		6-10	
	No.	%	No.	%	No.	%
Manufacturing	13	65.0	6	30	1	5.0
Construction	6	66.7	3	33.3	0	0
Distribution and Wholesale	18	78.3	5	21.7	0	0
Transport and Communications	8	72.7	2	18.2	1	9.1
Banking, Finance and Insurance	27	69.2	12	30.8	0	0
Consultancy Services	35	87.5	5	12.5	0	0
Legal, Accounting, Advertising and Recruitment	15	62.5	9	37.5	0	0
Other business Services	30	75.0	10	25.0	0	0
Other Services	32	72.7	11	25.0	1	2.3
Total	184	73.6	63	25.2	3	1.2

Base: all businesses (250)

OCCUPATIONAL STRUCTURE

E.25 Respondents were asked to estimate the proportions of their business' workforce engaged in managerial, technical/professional, skilled, semi-skilled, unskilled and clerical/administrative roles.

E.26 The majority of respondents stated that at least some of their workforce was in management positions, whilst 16.4% of firms had no employees in managerial roles. Other business services firms appear to have the highest proportion of their workforce in managerial roles. 37.5% of other business services stated that between 76% and 100% of their staff were in managerial roles. Manufacturing firms are the least likely to have staff in managerial roles. Only 2 firms in this sector stated that they had 0% of its workforce in such positions.

Table E.8 – Proportion of Workforce – Managerial

Industry Sector	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	2	10.0	5	25.0	9	45.0	1	5.0	3	15
Construction	1	11.1	0	0	3	33.3	3	33.3	2	22.2
Distribution and Wholesale	2	8.7	9	39.1	6	26.1	0	0	6	26.1
Transport and Communications	1	9.1	4	36.4	3	27.3	0	0	3	27.3
Banking, Finance and Insurance	6	15.4	12	30.8	12	30.8	0	0	9	23.1
Consultancy Services	12	30.0	8	20.0	7	17.5	2	5.0	11	27.5
Legal, Accounting, Advertising and Recruitment	2	8.3	10	41.7	7	29.2	0	0	5	20.8
Other business Services	8	20.0	4	10.0	11	27.5	2	5.0	15	37.5
Other Services	7	15.9	7	15.9	14	31.8	2	4.5	14	31.8
Total	41	16.4	59	23.6	72	28.8	10	4.0	68	27.2

Base: all businesses (250)

No. Employees	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	40	19.3	29	14.0	61	29.5	10	4.8	67	32.4
5 to 10	1	4.5	13	59.1	7	31.8	0	0	1	4.5
11 to 49	0	0	12	80.0	3	20.0	0	0	0	0
50+	0	0	5	83.3	1	16.7	0	0	0	0
Total	41	16.4	59	23.6	72	28.8	10	4.0	68	27.2

Base: all businesses (250)

E.27 48.8% of firms surveyed stated that they had no employees in technical/professional positions (Table E.9), although 16.8% of firms stated that such persons made up between 75% and 100% of their staff.

E.28 There are some variations between business sectors, with consultancy services being most likely to have technical or professional employees and

construction businesses being the least likely to employ technical/professional staff. Larger businesses (particularly those with 50+ employees) have more even proportions of technical/professional staff within their workforces.

Table E.9 - Proportion of Workforce – Technical/Professional

Industry Sector	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	8	40.0	0	0	5	25.0	4	20	3	15
Construction	8	88.9	1	11.1	0	0	0	0	0	0
Distribution and Wholesale	11	47.8	3	13.0	2	8.7	4	17.4	3	13.0
Transport and Communications	5	45.5	2	18.2	3	27.3	0	0	1	9.1
Banking, Finance and Insurance	21	53.8	3	7.7	6	15.4	4	10.3	5	12.8
Consultancy Services	12	30.0	3	7.5	5	12.5	6	15.0	14	35.0
Legal, Accounting, Advertising and Recruitment	11	45.8	2	8.3	1	4.2	7	29.2	3	12.5
Other business Services	22	55.0	3	7.5	7	17.5	2	5.0	6	15.0
Other Services	24	54.5	4	9.1	5	11.4	4	9.1	7	15.9
Total	122	48.8	21	8.4	34	13.6	31	12.4	42	16.8

Base: all businesses (250)

No. Employees	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	110	53.1	13	6.3	28	13.5	20	9.7	36	17.4
5 to 10	6	27.3	1	4.5	5	22.7	7	31.8	3	13.6
11 to 49	4	26.7	6	40.0	0	0	3	20.0	2	13.3
50+	2	33.3	1	16.7	1	16.7	1	16.7	1	16.7
Total	122	48.8	21	8.4	34	13.6	31	13.6	42	16.8

Base: all businesses (250)

E.29 Over three quarters (80.4%) of firms stated that they had no skilled staff in their employment (Table E.10). There are noticeable variations between sectors. Businesses in the distribution and wholesale sector are most likely to

employ skilled staff, whilst “white collar” companies (banking, finance and insurance, consultancy services and legal etc.) are less likely.

Table E.10 – Proportion of Workforce – Skilled

Industry Sector	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	16	80.0	1	5.0	2	10.0	0	0	1	5.0
Construction	6	66.7	1	11.1	2	22.2	0	0	0	0
Distribution and Wholesale	15	65.2	1	4.3	3	13.0	1	4.3	3	13.0
Transport and Communications	10	90.9	0	0	1	9.1	0	0	0	0
Banking, Finance and Insurance	32	82.1	2	5.1	3	7.7	0	0	2	5.1
Consultancy Services	36	90.0	2	5.0	1	2.5	0	0	1	2.5
Legal, Accounting, Advertising and Recruitment	18	75.0	0	0	4	16.7	2	8.3	0	0
Other business Services	33	82.5	2	5.0	4	10.0	0	0	1	2.5
Other Services	35	79.5	1	2.3	3	6.8	4	9.1	1	2.3
Total	201	80.4	10	4.0	23	9.2	7	2.8	9	3.6

Base: all businesses (250)

No. Employees	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	169	81.6	4	1.9	20	9.7	5	2.4	9	4.3
5 to 10	17	77.3	3	13.6	1	4.5	1	4.5	0	0
11 to 49	10	66.7	2	13.3	2	13.3	1	6.7	0	0
50+	5	83.3	1	16.7	0	0	0	0	0	0
Total	201	80.4	10	4.0	23	9.2	7	2.8	9	3.6

Base: all businesses (250)

E.30 Very few firms stated that they had any semi-skilled members of staff. 93.2% stated that they had no such employees (Table E.11). Firms in the distribution and wholesale and construction sectors were most likely to employ semi-

skilled employees – 26% had at least some staff in the category, compared to just under 8% of banking, finance and insurance firms; consultancy and other services.

E.31 Firms with 11-49 or more are most likely to employ semi-skilled workers. 26.7% of firms with employee sizes of 11-49 employed semi-skilled staff compared to 0% of larger (50+ employees) and 5.3% of small firms (1-4 employees).

Table E.11 - Proportion of Workforce – Semi-skilled

Industry Sector	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	20	100	0	0	0	0	0	0	0	0
Construction	7	77.8	0	0	2	22.2	0	0	0	0
Distribution and Wholesale	17	73.9	2	8.7	2	8.7	1	4.3	1	4.3
Transport and Communications	11	100	0	0	0	0	0	0	0	0
Banking, Finance and Insurance	36	92.3	2	5.1	0	0	1	2.6	0	0
Consultancy Services	38	95.0	1	2.5	1	2.5	0	0	0	0
Legal, Accounting, Advertising and Recruitment	24	10	0	0	0	0	0	0	0	0
Other business Services	38	95.0	2	5.0	0	0	0	0	0	0
Other Services	42	95.5	0	0	1	2.3	1	2.3	0	0
Total	233	93.2	7	2.8	6	2.4	3	1.2	1	4.0

Base: all businesses (250)

No. Employees	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	196	94.7	3	1.4	5	2.4	2	1	1	0.5
5 to 10	20	90.9	2	9.1	0	0	0	0	0	0
11 to 49	11	73.3	2	13.3	1	6.7	1	6.7	0	0
50+	6	100	0	0	0	0	0	0	0	0
Total	233	93.2	7	2.8	6	2.4	3	1.2	1	0.4

Base: all businesses (250)

E.32 Few firms employed any unskilled workers (Table E.12) An average of 96.4% of businesses had no unskilled staff. Firms in the distribution and wholesale sector and transport and communications were most likely to employ unskilled workers. 8.7% and 9.1% of firms in the respective sectors had unskilled staff in their workforce.

Table E.12 – Proportion of Workforce – Unskilled

Industry Sector	Percentage of Workforce					
	0%		1-25%		76-100%	
	No.	%	No.	%	No.	%
Manufacturing	20	100	0	0	0	0
Construction	9	100	0	0	0	0
Distribution and Wholesale	21	91.3	2	8.7	0	0
Transport and Communications	10	90.9	0	0	1	9.1
Banking, Finance and Insurance	37	94.9	2	5.1	0	0
Consultancy Services	39	97.5	1	2.5	0	0
Legal, Accounting, Advertising and Recruitment	24	100	0	0	0	0
Other business Services	38	95.0	2	5.0	0	0
Other Services	43	97.7	1	2.3	0	0
Total	241	96.4	8	3.2	1	0.4

Base: all businesses (250)

No. of Employees	Percentage of Workforce					
	0%		1-25%		76-100%	
	No.	%	No.	%	No.	%
1 to 4	203	98.1	4	1.9	0	0
5 to 10	20	90.9	2	9.1	0	0
11 to 49	12	80.0	2	13.3	1	6.7
50+	6	100	0	0	0	0
Total	241	96.4	8	3.2	1	0.4

Base: all businesses (250)

E.33 Approximately three-quarters (72.4%) of respondent firms have no members of staff in clerical/administrative roles (Table E.13). Businesses in the Banking, Finance and Insurance and larger firms (50+ employees) are most likely to employ clerical staff. Each sector had any staff in clerical/administrative roles.

Table E.13 – Proportion of Workforce – Clerical/administrative

Industry Sector	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	15	75.0	1	5.0	4	20	0	0	0	0
Construction	6	66.7	0	0	3	33.3	0	0	0	0
Distribution and Wholesale	15	65.2	6	26.1	1	4.3	0	0	1	4.3
Transport and Communications	7	63.6	1	9.1	1	9.1	1	9.1	1	9.1
Banking, Finance and Insurance	22	56.4	4	10.3	9	23.1	3	7.7	1	2.6
Consultancy Services	32	80.0	4	10.0	3	7.5	0	0	1	2.5
Legal, Accounting, Advertising and Recruitment	16	66.7	5	20.8	0	0	2	8.3	1	4.2
Other business Services	32	80.0	3	7.5	1	2.5	2	5.0	2	5.0
Other Services	36	81.8	1	2.3	4	9.1	3	6.8	0	0
Total	181	72.4	25	10.0	26	10.4	11	4.4	7	2.8

Base: all businesses (250)

No. Employees	Percentage of Workforce									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	166	80.2	9	4.3	21	10.1	6	2.9	5	2.4
5 to 10	10	45.5	7	31.8	4	18.2	1	4.5	0	0
11 to 49	5	33.3	7	46.7	0	0	2	13.3	1	6.7
50+	0	0	2	33.3	1	16.7	2	33.3	1	16.7
Total	181	72.4	25	10.0	26	10.4	11	4.4	7	2.8

Base: all businesses (250)

SKILLS SHORTAGES

E.34 Firms were asked whether their business suffered from skills shortages. As Table E.14 shows the majority of respondents stated that they were not affected by skills shortages, on average 93.2%. 6% of firms stated that they did suffer from skills shortages, this appears particularly acute in the construction, transport and communications and other business services sectors. Firms in the Banking, Finance and Insurance sector are least likely to be affected by skills shortages.

Table E.14 - Whether Business Suffers from Skills Shortages

Industry Sector	Response					
	Yes		No		Don't Know	
	No.	%	No	%	No.	%
Manufacturing	1	5.0	19	95.0	0	0
Construction	2	22.2	7	77.8	0	0
Distribution and Wholesale	1	4.3	22	95.7	0	0
Transport and Communications	1	9.1	9	81.8	1	9.1
Banking, Finance and Insurance	1	2.6	38	97.4	0	0
Consultancy Services	2	5.0	38	95.0	0	0
Legal, Accounting, Advertising and Recruitment	1	4.2	23	95.8	0	0
Other business Services	3	7.5	36	90.0	1	2.5
Other Services	3	6.8	41	93.2	0	0
Total	15	6.0	233	93.2	2	0.8
No. Employees						
1 to 4	9	4.3	197	95.2	1	0.5
5 to 10	4	18.2	18	81.8	0	0
11 to 49	1	6.7	13	86.7	1	6.7
50+	1	16.7	5	83.3	0	0
Total	15	6.0	233	93.2	2	0.8

Base: all businesses (250)

E.35 Table E.15 illustrates that skills shortages are worst in the skilled staff category stated with 53.3% of respondents stating that they were suffering from skill shortages. There would also appear to be a significant shortage in technical/ professional staff—40% of respondents reported shortages in this area.

Table E.15 - Type of Skills Shortages

Skill Shortage	No.	%
Managerial	1	6.7
Technical/ Professional	6	40.0
Skilled	8	53.3
Semi-Skilled	1	6.7
Unskilled	1	6.7
Clerical/ Administrative	4	26.7
Total	15	-

Base: businesses that stated skills shortages (15)

E.36 Respondents who stated there was a skills shortage (15) were asked to specify if any of the following initiatives would be used to address the issue of skill shortage. The initiatives and respective results are as follows:

- General (2 respondents)
- Specific Computer Training Courses (3 respondents)
- Management Training Courses (2 respondents)
- Team Working Initiatives (1 respondent)
- Interpersonal Skills Training (3 respondents)
- Other (9 respondents)

TURNOVER

- E.37 Respondents were asked to estimate the approximate value of their business' turnover value in the last financial year¹⁹ (Table E.16).
- E.38 The largest proportion of respondents (who answered the question) stated that their turnover was "up to £100,000" in the past year (26%). 46.4% of respondent firms had a turnover of less than £500,000, whilst 12.4% of all firms stated a turnover of more than £500,000. Firms in the banking, finance and insurance sector and other services were most likely to have a turnover of more than £10m (an average of 5%). There were no firms in manufacturing, construction; distribution; consultancy; transport and communications; legal, accounting, advertisement and recruitment sectors and other service sectors that had turnovers of more than £10m.
- E.39 There is a predictable correlation between larger companies (with 11 to 49, or 50+ staff) and annual turnover, with the majority of firms in the 50 or more employees category (50%) turning over £2 million or more in the past year compared to 2.5% of firms with between 1 and 4 employees.

¹⁹ There was a high rate of refusal to answer this question (41.2%)

Table E.16 - Approximate Value of Turnover in Previous Year(Bands)

Industry Sector	Approximate Value																			
	Up to £100,000		£100,000 - £250,000		£250,000 - £500,000		£500,000- £1m		£1m - £1.5m		£1.5m - £2m		£2m - £5m		£5m - £10m		More than £10m		Refused/ Don't know	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	2	10.0	1	5.0	2	10.0	2	10.0	0	0	0	0	2	10.0	0	0	0	0	11	55.0
Construction	2	22.2	1	11.1	1	11.1	0	0	1	11.1	0	0	0	0	0	0	0	0	4	44.4
Distribution and Wholesale	12	52.2	0	0	2	8.7	0	0	0	0	3	13.0	0	0	0	0	0	0	6	26.1
Transport and Communications	3	27.3	2	18.2	1	9.1	0	0	1	9.1	0	0	0	0	0	0	0	0	4	36.4
Banking, Finance and Insurance	8	20.5	5	12.8	3	7.7	3	7.7	2	5.1	1	2.6	0	0	2	5.1	2	5.1	13	33.3
Consultancy Services	9	22.5	8	20.0	5	12.5	0	0	0	0	0	0	1	2.5	0	0	0	0	17	42.5
Legal, Accounting, Advertising and Recruitment	5	20.8	1	4.2	2	8.3	1	4.2	0	0	0	0	1	4.2	0	0	0	0	14	58.3
Other business Services	10	25.0	5	12.5	4	10.0	2	5.0	0	0	0	0	1	2.5	1	2.5	2	5.0	15	37.5
Other Services	14	31.8	6	13.6	2	4.5	2	4.5	1	2.3	0	0	0	0	0	0	0	0	19	43.2
Total	65	26.0	29	11.6	22	8.8	10	4.0	5	2.0	4	1.6	5	2.0	3	1.2	4	1.6	103	41.2

Base: all businesses (250)

No. Employees	Approximate Value																			
	Up to £100,000		£100,000 - £250,000		£250,000 - £500,000		£500,000- £1m		£1m - £1.5m		£1.5m - £2m		£2m - £5m		£5m - £10m		More than £10m		Refused/ Don't know	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	64	30.9	27	13.0	14	6.8	7	3.4	4	1.9	2	1.0	1	0.5	1	0.5	1	0.5	86	41.5
5 to 10	0	0	1	4.5	7	31.8	2	9.1	1	4.5	0	0	1	4.5	1	4.5	1	4.5	8	36.4
11 to 49	1	6.7	1	6.7	1	6.7	1	6.7	0	0	2	13.3	2	13.3	1	6.7	0	0	6	40.0
50+	0	0	0	0	0	0	0	0	0	0	0	0	1	16.7	0	0	2	33.3	3	50.0
Total	65	26.0	29	11.6	22	8.8	10	4.0	5	2.0	4	1.6	5	2.0	3	1.2	4	1.6	103	41.2

Base: all businesses (250)

KEY FINDINGS

- E.40 The business survey illustrates that the majority of businesses participating in the survey (58.4%) were “Limited Companies” contrasted with 27% “Sole Traders” and 9.6% “Partnerships”. Approximately 28.7% of owners were of ethnic origin other than “white-British”.
- E.41 With regard to employment, the survey illustrated that all firms employ at least one member of full time staff, whilst 18.4% of firms employ more than 10 members of full time staff. 26.4% have some part time members of staff. There has been a net rise in numbers of full and part time staff across all business sectors during the past two years.
- E.42 The business survey has also identified key trends with regards to the occupational structure of the Borough; it has demonstrated that the Borough has a relatively high proportion of managerial, technical/professional and a reasonably small proportion of clerical; skilled semi-skilled and unskilled employees. This trend occurs across the various employment sectors, and is not confined to service based industries.
- E.43 When asked whether each business suffered from skills shortages, 93.2% of respondents stated that their firms did not. Of the 6% of firms that stated that they did suffer from skill shortages, shortages were most prolific amongst technical/professional or skilled employee categories.
- E.44 The survey enquired about business turnover and although many respondents refused/did not know information pertaining to this, several trends emerged. The largest proportion of participating firms had a turnover of less than £500,000.

BUSINESS PREMISES INFORMATION

- E.45 This section outlines responses with regard to business premises. Information from respondents is provided regarding basis of occupation; leases; floor space; details of premises; and the proportion of turnover spent on accommodation.

BASIS OF OCCUPATION

- E.46 The largest proportion of participating firms occupies their premises on a leasehold basis (41.4%) as illustrated in Table E.17. A similar pattern is noted across all sizes and sectors with the exception of transport and communications who are more likely to occupy their premises on an “other” basis.

Table E.17 - Basis of Occupation of Premises

Industry Sector	Occupation of Premises							
	Freehold		Leasehold		Licence		Other ²⁰	
	No.	%	No.	%	No.	%	No.	%
Manufacturing	2	10.5	12	63.2	1	5.3	4	1.6
Construction	1	11.1	3	33.3	0	0	5	2.0
Distribution and Wholesale	7	30.4	12	52.2	1	4.3	3	1.2
Transport and Communications	3	27.3	2	18.2	0	0	6	2.4
Banking, Finance and Insurance	7	17.9	19	48.7	0	0	13	5.2
Consultancy Services	6	15.0	15	37.5	2	5.0	17	6.8
Legal, Accounting, Advertisement and Recruitment	3	12.5	6	25.0	1	4.2	14	5.6
Business Services	6	15.0	16	40.0	1	2.5	17	6.8
Other Services	11	25.0	18	40.9	2	4.5	13	5.2
Total	46	18.5	103	41.4	8	3.2	92	36.9

Base: all businesses (249)

No. Employees	Occupation of Premises							
	Freehold		Leasehold		Licence		Other	
	No.	%	No.	%	No.	%	No.	%
1 to 4	37	17.9	82	39.6	6	2.9	82	32.9
5 to 10	5	23.8	7	33.3	2	9.5	7	2.8
11 to 49	3	20	9	60.0	0	0	3	1.2
50+	1	16.7	5	83.3	0	0	0	0
Total	46	18.5	103	41.4	8	3.2	91	36.5

Base: all businesses (249)

E.47 With regard to the length of time that each firm has been established it is evident from table E.18 that the highest majority of firms have been established between 1 and 10 years. The highest proportion of businesses in the Borough have been established for 6-10 years (21.2%).

²⁰ other includes work from home, rent/no lease and don't know

Table E.18 – How Long Has Your Business Been Established in Hammersmith and Fulham?

Industry Sector	Time Period															
	< 11 Months		1-2yrs		3-5yrs		6-10yrs		11-15yrs		16-20yrs		21+ yrs		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing		5.0		20.0		20.0		25.0		5.0		0		25.0		0
Construction		0		33.3		22.2		22.2		11.1		11.1		0		0
Distribution and Wholesale		0		4.3		21.7		17.4		30.4		17.4		8.7		0
Transport and Communications		18.2		9.1		18.2		18.2		9.1		18.2		9.1		0
Banking, Finance and Insurance		5.1		23.1		12.8		33.3		0		128.		10.3		2.6
Consultancy Services		15.0		22.5		12.5		17.5		12.5		7.5		10.0		2.5
Legal, Accounting, Advertisement and Recruitment		12.5		16.7		29.2		25.0		12.5		4.2		0		0
Business Services		15.0		20.0		25.0		15.0		10.0		5.0		7.5		2.5
Other Services		9.1		18.2		20.5		18.2		13.6		6.8		13.6		0
Total	24	9.6	47	18.8	49	19.6	53	21.2	28	11.2	21	8.4	25	10.0	3	1.2

Base: All businesses 250

No. Employees	Time Period															
	< 11 Months		1-2 yrs		3-5yrs		6-10yrs		11-15yrs		16-20yrs		21+yrs		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	20	9.7	43	20.8	38	18.4	42	20.3	24	11.6	17	8.2	21	10.1	2	1.0
5 to 10	2	9.1	2	9.1	7	31.8	7	31.8	2	9.1	1	4.5	1	4.5	0	0
11-49	1	6.7	1	6.7	2	13.3	3	20.0	2	13.3	3	0	2	13.3	1	6.7
50+	1	16.7	1	16.7	2	33.3	1	16.7	0	0	0	0	1	16.7	0	0
Total	24	9.6	47	18.8	49	19.6	53	21.2	28	11.2	21	8.4	25	10.0	3	1.2

Base all Businesses (250)

TIME REMAINING ON LEASE

E.48 Of the 111 firms who occupy their premises on a “leasehold” basis, the largest proportion (20.7%) have between 1 and 2 years remaining on their lease (Table E.19)

Table E.19 - Years Remaining on Existing Lease/Licence

Industry Sector	Time Period																Don't know
	< 1 year		1-2		3-5		6-10		11-15		16-20		21+				
	No	%	No	%	No	%	No	%	No	%	No	%	No	%			
Manufacturing	0	0	2	15.4	5	38.5	2	15.4	0	0	0	0	2	15.4	2	15.4	
Construction	0	0	0	0	0	0	1	33.3	0	0	0	0	0	0	2	66.7	
Distribution and Wholesale	3	23.1	4	30.8	2	15.4	2	15.4	0	0	1	7.7	0	0	1	7.7	
Transport and Communications	1	50.0	1	50.0	0	0	0	0	0	0	0	0	0	0	0	0	
Banking, Finance and Insurance	1	5.3	3	15.8	4	21.1	3	15.8	0	0	1	5.3	3	15.8	4	21.1	
Consultancy Services	3	17.6	4	23.5	1	5.9	2	11.8	1	5.9	0	0	1	5.9	5	29.4	
Legal, Accounting, Advertisement and Recruitment	2	28.6	0	0	2	28.6	0	0	0	0	0	5.9	1	14.3	2	28.6	
Business Services	5	29.4	5	29.4	3	17.6	0	0	0	0	0	0	1	5.9	3	17.6	
Other Services	5	25.0	4	20.0	2	10.0	3	15.0	0	0	0	0	0	0	6	30.0	
Total	20	18.0	23	20.7	19	17.1	13	11.7	1	0.9	2	1.8	8	7.2	25	22.5	

Base: all with leasehold/licence premises (111)

No. Employees	Time Period																Don't know
	< 1 year		1-2		3-5		6-10		11-15		16-20		21+				
	No	%	No	%	No	%	No	%	No	%	No	%	No	%			
1 to 4	16	18.2	17	19.3	14	15.9	11	12.5	1	1.1	1	1.1	8	9.1	20	22.7	
5 to 10	2	22.2	2	22.2	2	22.2	0	0	0	0	1	11.1	0	0	2	22.2	
11-49	2	22.2	3	33.3	2	22.2	1	11.1	0	0	0	0	0	0	1	11.1	
50+	0	0	1	20.0	1	20.0	1	20.0	0	0	0	0	0	0	2	40.0	

Total	20	18.0	23	20.7	19	17.1	13	11.7	1	9	2	1.8	8	7.2	25	22.5
--------------	-----------	-------------	-----------	-------------	-----------	-------------	-----------	-------------	----------	----------	----------	------------	----------	------------	-----------	-------------

FLOORSPACE

E.49 Respondents were asked to estimate the total floor space occupied by the business' premises. Respondents answered in either imperial or metric measurements. Many respondents could not answer the question²¹.

²¹ 120 respondents were unable to answer the question.

Table E.20 - Total Floor Space Occupied

Industry Sectors	Approximate Value (Square Feet)															
	1-500		500-1000		1001-2000		2001-3000		4001-5000		5001-10,000		10,001+		Don't Know	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	5	25.0	1	5.0	4	20.0	0	0	0	0	1	5.0	0	0	9	45.0
Construction	3	33.3	1	11.1	0	0	0	0	0	0	0	0	0	0	5	55.6
Distribution and Wholesale	3	13.0	3	13.0	3	13.0	1	4.3	0	0	1	4.3	0	0	12	52.2
Transport and Communications	1	9.1	0	0	0	0	0	0	0	0	0	0	0	0	10	90.9
Banking, Finance and Insurance	13	33.3	5	12.8	4	10.3	0	0	0	0	0	0	2	5.1	15	38.5
Consultancy Services	16	40.0	3	7.5	2	5.0	0	0	0	0	0	0	1	2.5	18	45.0
Legal, Accounting, Advertisement and Recruitment	6	25.0	3	12.5	1	4.2	0	0	0	0	0	0	0	0	14	58.3
Business Services	11	27.5	4	10.0	1	2.5	0	0	1	2.5	0	0	1	2.5	22	55.0
Other Services	18	40.9	2	4.5	3	6.8	4	9.1	0	0	1	2.3	1	2.3	15	34.1
Total	76	30.4	22	8.8	18	7.2	5	2.0	1	4	3	1.2	5	2.0	120	48.0

Base: all businesses (250).

Approximate Value (Square Feet)

No. of Employees	1-500		500-1000		1001-2000		2001-3000		4001-5000		5001-10,000		10,001+		Don't Know	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	69	33.3	21	10.1	12	5.8	4	1.9	0	0	0	0	3	1.4	98	47.3
5 to 10	7	31.8	0	0	5	22.7	0	0	0	0	0	0	0	0	10	45.5
11 to 49	0	0	0	0	1	6.7	1	6.7	1	6.7	2	13.3	0	0	10	66.7
50+	0	0	1	16.7	0	0	0	0	0	0	1	16.7	2	33.3	2	33.3
Total	76	30.4	22	8.8	18	7.2	5	2.0	1	0.4	3	1.2	5	2.0	120	48.0

Base: All businesses (250)

E.50 Table E.21 illustrates the mean floor space occupied according to sector. Banking, Finance and Insurance firms are likely to require the largest amount of floor space, with a mean average of 12,383 square feet. Other business services require the least: an average of 161.4 square feet. There is an obvious correlation between floor space and number of employees: Firms with more than 50 staff require an average of 10,500 square feet, whilst firms of between 1 and 4 employees require 3,509 square feet on average. The average firm in Hammersmith and Fulham requires floor space of 3,746 square feet.

Table E.21 – Mean Floor Space Occupied

Industry Sector	Base (no. of respondents)	Mean (Sq Feet)
Manufacturing	11	1406.50
Construction	4	2783.26
Distribution & Wholesale	11	4699.11
Transport & Communications	1	161.46
Banking, Finance and Insurance etc	24	12383.19
Consultancy Services	22	1096.54
Legal, Accounting, Advertisement and Recruitment	10	682.05
Other Business Services	18	1897.27
Other Services	29	1595.82
Total	130	3746.36
No. Employees		
1 to 4	109	3509.72
5 to 10	12	814.55
11 to 49	5	10538.56
50+	4	10500.00
Overall	130	3746.36

Base: all businesses who were able to give an answer (130)

Activities

E.51 Respondents were asked to estimate the proportions of floor space their premises dedicate to a range of business uses.

E.52 Over half of respondents (52%) dedicate between 76% and 100% of their floor space to office activities. 13.6% of firms have no floor space dedicated to office activities. This is most likely in the distribution and wholesale sector (30.4%). Legal, accounting, advertisement and recruitment firms dedicate the most floor space to office activities – 83.3% of firms interviewed dedicate 76-100% to such activities. (Table E.22)

Table E.22 - Proportion of Floor Space Dedicated to Office Activities

Industry Sector	Percentage of business floor space dedicated to office use											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	4	20.0	7	35	1	5.0	1	5.0	4	20.0	3	15
Construction	2	22.2	2	22.2	0	0	0	0	3	33.3	2	22.2
Distribution and Wholesale	7	30.4	7	30.4	1	4.3	1	4.3	2	8.7	5	21.7
Transport and Communications	0	0	1	9.1	0	0	0	0	6	54.5	4	36.4
Banking, Finance and Insurance	2	5.1	4	10.3	3	7.7	3	7.7	25	64.1	2	5.1
Consultancy Services	4	10.0	0	0	2	5.0	0	0	32	80.0	2	5.0
Legal, Accounting, Advertisement and Recruitment	2	8.3	0	0	0	0	1	4.2	20	83.3	1	4.2
Other Business Services	4	10.0	7	17.5	3	7.5	0	0	20	50	6	15.0
Other Services	9	20.5	7	15.9	3	6.8	1	2.3	18	40.9	6	13.6
Total	34	13.6	35	14.0	13	5.2	7	2.8	130	52.0	31	12.4

Base: all businesses (250)

No. Employees	Percentage of business floor space dedicated to office Use											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	33	15.9	31	15.0	7	3.4	5	2.4	104	50.2	27	13.0
5 to 10	1	4.5	1	4.5	4	18.2	0	0	16	72.7	0	0
11 to 49	0	0	3	20.0	0	0	2	13.3	6	40.0	4	26.7
50+	0	0	0	0	2	33.3	0	0	4	66.7	0	0
Total	34	13.6	35	14.0	13	5.2	7	2.8	130	52.0	31	12.4

Base: all businesses (250)

- E.53 Mid-size firms appear to have more space dedicated to office activities than smaller and larger firms. 72.7% of firms with staff of 5-10 dedicate between 76% and 100% of their floor space to office activities, compared to 50% of firms with between 1 and 4 employees and 66.7% of firms with staff of over 50 people.
- E.54 As Table E.23 illustrates 78% of respondents have no floor space dedicated to production. The manufacturing sector is most likely to have at least some space dedicated to production. 15% of manufacturing firms dedicate between 76-100% of their floor space to production activities, this compares to values of under 9% in other sectors within this category.

Table E.23 – Proportion of Floor Space Dedicated to Production

Industry Sector	Percentage of business space dedicated to production											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	9	45.0	2	10.0	3	15.0	0	0	3	15.0	3	15.0
Construction	6	66.7	0	0	1	11.1	0	0	0	0	2	22.2
Distribution and Wholesale	16	69.6	0	0	0	0	0	0	2	8.7	5	21.7
Transport and Communications	6	54.5	0	0	0	0	1	9.1	0	0	4	36.4
Banking, Finance and Insurance	35	89.7	1	2.6	1	2.6	0	0	0	0	2	5.1
Consultancy Services	37	92.5	1	2.5	0	0	0	0	0	0	2	5.0
Legal, Accounting, Advertisement and Recruitment	23	95.8	0	0	0	0	0	0	0	0	1	4.2
Other Business Services	29	72.5	1	2.5	1	2.5	1	2.5	2	5.0	6	15.0
Other Services	34	77.3	0	0	1	2.3	0	0	3	6.8	6	13.6
Total	195	78.0	5	2.0	7	2.8	2	0.8	10	4.0	31	12.4

Base: all businesses (250)

No. Employees	Percentage of floor space dedicated to production											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	163	78.7	4	1.9	4	1.9	1	0.5	8	3.9	27	13.0
5 to 10	18	81.8	1	4.5	1	4.5	1	4.5	1	4.5	0	0
11 to 49	9	60.0	0	0	1	6.7	0	0	1	6.7	4	26.7
50+	5	83.3	0	0	1	16.7	0	0	0	0	0	0
Total	195	78.0	5	2.0	7	2.8	2	0.8	10	4.0	31	12.4

Base: all businesses (250)

E.55 Only 9.6% of firms (this excludes respondents who answered “don’t know”) dedicate floor space to studio or flexible workspace. Analysis by sector shows the most likely sectors to have studio or flexible workspace are: distribution and wholesale (39.1%); other services (54.5%) and manufacturing firms (55%).

Table E.24 – Proportion of Floor Space Dedicated to Studio/Flexible Workspace

Industry Sector	Percentage of business space dedicated to studio/ flexible workspace											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	11	55.0	2	10.0	2	10.0	2	10.0	0	0	3	15.0
Construction	6	66.7	0	0	0	0	0	0	1	11.1	2	22.2
Distribution and Wholesale	9	39.1	1	4.3	1	4.3	0	0	7	30.4	5	21.7
Transport and Communications	7	63.6	0	0	0	0	0	0	0	0	4	36.4
Banking, Finance and Insurance	33	84.6	1	2.6	1	2.6	0	0	0	0	2	5.1
Consultancy Services	33	82.5	1	2.5	0	0	0	0	4	10.0	2	5.0
Legal, Accounting, Advertisement and Recruitment	21	87.5	0	0	0	0	0	0	2	8.3	1	4.2
Other Business Services	25	62.5	4	10.0	0	0	1	2.5	4	10.0	6	15.0
Other Services	24	54.5	2	4.5	2	4.5	0	0	10	22.7	6	13.6
Total	169	67.6	11	4.4	6	2.4	3	1.2	30	12.0	31	12.4

Base: all businesses (250)

No. Employees	Percentage of floor space dedicated to studio/ flexible workspace											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	134	64.7	9	4.3	5	2.4	2	1.0	30	14.5	27	13.0
5 to 10	21	95.5	0	0	0	0	1	4.5	0	0	0	0
11 to 49	9	60.0	1	6.7	1	6.7	0	0	0	0	4	26.7
50+	5	83.3	1	16.7	0	0	0	0	0	0	0	0
Total	169	67.6	11	4.4	6	2.4	3	1.2	30	12.0	31	12.4

Base: all businesses (250)

E.56 There are clear differences between sectors regarding floor space dedicated to warehousing and storage (Table E.25). The distribution and wholesale sector are most likely to dedicate floor space to this use – 4.3% dedicate between 26% and 50% of their floor space to it. Least likely to dedicate floor

space to warehousing and storage are professional sectors. 91.7% of legal, accounting, advertisement and recruitment firms have no dedicated floor space.

- E.57 Large firms with more than 50 employees are most likely to have no space dedicated to warehousing and storage. Only one respondent firm in this sector stated that they dedicated any space to this use.

Table E.25 – Proportion of Floor Space Dedicated to Warehouse/Storage

Industry Sector	Percentage of floor space dedicated to warehouse/ storage											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	12	60.0	1	5.0	3	15.0	0	0	1	5.0	3	15.0
Construction	5	55.6	2	22.2	0	0	0	0	0	0	2	22.2
Distribution and Wholesale	11	47.8	6	26.1	1	4.3	0	0	0	0	5	21.7
Transport and Communications	7	63.6	0	0	0	0	0	0	0	0	4	36.4
Banking, Finance and Insurance	30	76.9	3	7.7	3	7.7	1	2.6	0	0	2	5.1
Consultancy Services	36	90.0	1	2.5	1	2.5	0	0	0	0	2	5.0
Legal, Accounting, Advertisement and Recruitment	22	91.7	0	0	1	4.2	0	0	0	0	1	4.2
Other Business Services	31	77.5	2	5.0	1	2.5	0	0	0	0	6	15.0
Other Services	36	81.8	2	4.5	0	0	0	0	0	0	6	13.6
Total	190	76.0	17	6.8	10	4.0	1	0.4	1	0.4	31	12.4

Base: all businesses (250)

No. Employees	Percentage of floor space dedicated to warehouse/ storage											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	159	76.8	12	5.8	7	3.4	1	0.5	1	0.5	27	13.0
5 to 10	18	81.8	1	4.5	3	13.6	0	0	0	0	0	0
11 to 49	8	53.3	3	20.0	0	0	0	0	0	0	4	26.7
50+	5	83.3	1	16.7	0	0	0	0	0	0	0	0
Total	190	76.0	17	6.8	10	4.0	1	0.4	1	0.4	31	12.4

Base: all businesses (250)

E.58 The vast majority of respondent firms stated that they have no space, or do not know how much space they have dedicated to showroom (92.4%). Distribution and wholesale firms are most likely to dedicate floor space to showroom – 3.2% of firms have 76-100% of their floor space for this purpose. No firms in the transport and communications services; consultancy services, nor legal, accounting, advertising and recruitment sectors responded that they had any space dedicated to showroom. Likewise, only one firm employing more than 50 staff stated that they had any floor space dedicated to showroom.

Table E.26 – Proportion of Floor Space Dedicated to Showroom

Industry Sector	Percentage of floor space dedicated to showroom use											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	12	60.0	1	5.0	3	15.0	0	0	1	5.0	3	15.0
Construction	6	66.7	0	0	0	0	1	11.1	0	0	2	22.2
Distribution and Wholesale	13	56.5	0	0	0	0	1	4.3	4	17.4	5	21.7
Transport and Communications	7	63.6	0	0	0	0	0	0	0	0	4	36.4
Banking, Finance and Insurance	31	79.5	4	10.3	0	0	0	0	2	5.1	2	5.1
Consultancy Services	38	95.0	0	0	0	0	0	0	0	0	2	5.0
Legal, Accounting, Advertisement and Recruitment	23	95.8	0	0	0	0	0	0	0	0	1	4.2
Other Business Services	33	82.5	1	2.5	0	0	0	0	0	0	6	15.0
Other Services	37	84.1	0	0	0	0	0	0	1	2.3	6	13.6
Total	200	80.0	6	2.4	3	1.2	2	0.8	8	3.2	31	12.4

Base: all businesses (250)

No. Employees	Percentage of floor space dedicated to showroom use											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	165	79.7	4	1.9	3	1.4	2	1.0	6	2.9	27	13.0
5 to 11	22	100	0	0	0	0	0	0	0	0	0	0
11 to 49	8	53.3	1	6.7	0	0	0	0	2	13.3	4	26.7
50+	5	83.3	1	16.7	0	0	0	0	0	0	0	0
Total	200	80.0	6	2.4	3	1.2	2	0.8	8	3.2	31	12.4

Base: all businesses (250)

E.59 Very few respondents stated that they had any floor space vacant (Table E.27). 98.8% stated that they either had none or did not know.

Table E.27 – Proportion of Floor Space Vacant

Industry Sector	Percentage of floor space vacant							
	None		1-25%		26-50%		Don't know	
	No	%	No	%	No	%	No	%
Manufacturing	16	80.0	0	0	1	5.0	3	15.0
Construction	7	77.8	0	0	0	0	2	22.2
Distribution and Wholesale	18	78.3	0	0	0	0	5	21.7
Transport and Communications	7	63.6	0	0	0	0	4	36.4
Banking, Finance and Insurance	36	92.3	1	2.6	0	0	2	5.1
Consultancy Services	37	92.5	1	2.5	0	0	2	5.0
Legal, Accounting, Advertisement and Recruitment	23	95.8	0	0	0	0	1	4.2
Other Business Services	34	85.0	0	0	0	0	6	15.0
Other Services	38	86.4	0	0	0	0	6	13.6
Total	216	86.4	2	0.8	1	0.4	31	12.4

Base: all businesses (250)

No. Employees	Percentage of floor space vacant							
	None		1-25%		26-50%		Don't know	
	No	%	No	%	No	%	No	%
1 to 4	177	85.5	2	1.0	1	0.5	27	13.0
5 to 11	22	100	0	0	0	0	0	0
11 to 49	11	73.3	0	0	0	0	4	26.7
50+	6	100	0	0	0	0	0	0
Total	216	86.4	2	0.8	1	0.4	31	12.4

Base: all businesses (250)

E.60 With regard to yard space (Table E.28), it is evident that 63.6% of respondents asserted there to be no provision. Of those respondents who specified an approximate figure (other than “don’t know”), the banking, finance and insurance sector had the highest provision with 5.1% of respondents suggesting there to be 10,000 square feet or over. No firms in the construction, transport and communications; legal, accountancy and recruitment sector responded that they had any space dedicated to yard space.

Table E.28 – The Total Yard Space (Square Feet)

Industry Sector	Approximate size of total yard space (sq/ft)											
	None		1-500		501-1000		1001-2000		10,000+		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	11	55.0	0	0	2	10.0	0	0	0	0	7	35.0
Construction	3	33.3	0	0	0	0	0	0	0	0	6	66.7
Distribution and Wholesale	13	56.5	2	8.7	0	0	0	0	0	0	8	34.8
Transport and Communications	2	18.2	0	0	0	0	0	0	0	0	9	81.8
Banking, Finance and Insurance	24	61.5	3	7.7	0	0	0	0	2	5.1	10	25.6
Consultancy Services	33	82.5	2	5.0	0	0	0	0	0	0	5	12.5
Legal, Accounting, Advertisement and Recruitment	18	75.0	0	0	0	0	0	0	0	0	6	25.0
Other Business Services	19	47.5	2	5.0	0	0	2	5.0	0	0	17	42.5
Other Services	36	81.8	1	2.3	0	0	0	0	0	0	7	15.9
Total	159	63.6	10	4.0	2	0.8	2	0.8	2	0.8	75	30.0

Base: all businesses (250)

No. Employees	Approximate size of total yard space (sq/ft)											
	None		1-500		501-1000		1001-2000		10,000+		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	139	67.1	5	2.4	2	1.0	1	0.5	1	0.5	59	28.5
5 to 10	11	50.0	3	13.6	0	0	0	0	1	4.5	7	31.8
11 to 49	6	40.0	1	6.7	0	0	0	0	0	0	8	53.3
50+	3	50.0	1	16.7	0	0	1	16.7	0	0	1	16.7
Total	159	63.6	10	4.0	2	0.8	2	0.8	2	0.8	75	30.0

Base: all businesses (250)

E.61 The mean value dedicated to yard space was 405 square feet (Table E.29). The banking sector had the highest mean provision held at 2267 square feet, while the construction, transport and communication, legal, accountancy, advertising and recruitment sector had none. It is evident that firms with an employee base of 5-10 employees had the highest mean value in yard space provision, held at 2702 square feet.

Table E.29 – Mean Yard Spaces (Square Feet)²²

Industry Sector	Base (no. respondents)	Mean (sq/ft)
Manufacturing	13	126.60
Construction	3	0
Distribution & Wholesale	15	13.84
Transport & Communications	2	0
Banking, Finance & Insurance	29	2267.74
Consultancy Services	35	2.94
Legal, Accounting, Advertising & Recruitment	18	0
Other Business Services	23	129.84
Other Services	37	5.41
Total	175	405.19
No. Employees		
1 to 4	148	191.60
5 to 10	15	2702.87
11 to 49	7	15.38
50+	5	380.00
Total	175	405.19

Base: For all those who responded (175)

The majority of respondents stated that their firms did not have any space dedicated to other uses (Table E.30).

²² For respondents who gave a figure (excludes those who said “don’t know”)

Table E.30 – Proportion of Floor Space Dedicated to Other Uses

Industry Sector	Percentage of floor space dedicated to other uses											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	16	80.0	1	5.0	0	0	0	0	1	5.0	2	10.0
Construction	7	77.8	1	11.1	0	0	0	0	0	0	1	11.1
Distribution and Wholesale	19	82.6	1	4.3	0	0	0	0	0	0	3	13.0
Transport and Communications	8	72.7	1	9.1	0	0	0	0	0	0	2	18.2
Banking, Finance and Insurance	36	92.3	2	5.1	0	0	0	0	0	0	1	2.6
Consultancy Services	36	90.0	0	0	0	0	1	2.5	0	0	3	7.5
Legal, Accounting, Advertisement and Recruitment	23	95.8	0	0	0	0	0	0	0	0	1	4.2
Other Business Services	34	85.0	2	5.0	1	2.5	2	4.5	2	5.0	1	2.5
Other Services	40	90.9	0	0	1	2.3	0	0	0	0	1	2.3
Total	219	87.6	8	3.2	2	0.8	3	1.2	3	1.2	15	6.0

Base: all businesses (250)

No. Employees	Percentage of floor space dedicated to other uses											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	183	88.4	5	2.4	2	1.0	3	1.4	3	1.4	11	5.3
5 to 11	22	100	0	0	0	0	0	0	0	0	0	0
11 to 49	10	66.7	1	6.7	0	0	0	0	0	0	4	26.7
50+	4	66.7	2	33.3	0	0	0	0	0	0	0	0
Total	219	87.6	8	3.2	2	0.8	3	1.3	3	1.2	15	6.0

Base: all businesses (250)

E.62 31 respondents²³ indicated that their businesses have other uses of floor space. These include²⁴:

- Don't Know/ Nothing (15)
- Toilets/ washroom (6)
- Community activities (1)
- Cloak Room (1)
- Consulting Room (1)
- Equipment Space (2)
- Gym (2)
- Kitchen/ Tea Room (2)
- Open Yard (1)
- Residential space (2)
- Training Room (1)

COST OF BUSINESS ACCOMODATION

E.63 Respondents were asked to estimate how much of the business' turnover is spent on business accommodation (excluding rates). The resultant data (Table E.31) has been filtered to look only at responses from businesses which are not occupied on a freehold basis.

E.64 Over half (64.8%) of those interviewed did not know the proportion of turnover spent on accommodation. 16.4% spent up to 10% of their turnover on

²³ Note that a further 15 respondents were unable to estimate the amount of space dedicated to 'other' uses

²⁴ Parenthesis shows number of responses

accommodation, whilst 6% spent none of their turnover. 4% spent more than 25% of turnover.

Table E.31 – Proportion of Turnover Spent on Accommodation

Industry Sector	Approximate Proportion																Don't know / n/a
	None		Up to 5%		6-10%		11-15%		16-20%		21-25%		Over 25%				
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%			
Manufacturing	0	0	2	10.0	3	15.0	1	5.0	1	5.0	0	0	2	10.0	11	55.0	
Construction	1	11.1	0	0	0	0	0	0	0	0	0	0	1	11.1	7	77.8	
Distribution and Wholesale	1	4.3	0	0	1	4.3	0	0	2	8.7	0	0	4	17.4	15	65.2	
Transport and Communications	0	0	1	9.1	1	9.1	0	0	0	0	0	0	0	0	9	81.8	
Banking, Finance and Insurance	3	7.7	6	15.4	4	10.3	1	2.6	2	5.1	2	5.1	0	0	21	53.8	
Consultancy Services	2	5.0	4	10.0	5	12.5	1	2.5	4	10.0	0	0	0	0	24	60.0	
Legal, Accounting, Advertisement and Recruitment	1	4.2	2	8.3	1	4.2	0	0	2	8.3	0	0	0	0	18	75.0	
Business Services	3	7.5	3	7.5	2	5.0	2	5.0	1	2.5	0	0	3	7.5	26	65.0	
Other Services	4	9.1	3	6.8	3	6.8	2	4.5	1	2.3	0	0	0	0	31	70.5	
Total	15	6.0	21	8.4	20	8.0	7	2.8	13	5.2	2	0.8	10	4.0	162	64.8	

Base: all businesses (250)

Industry Sector	Approximate Proportion														Don't know / n/a	
	None		Up to 5%		6-10%		11-15%		16-20%		21-25%		Over 25%			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%		
1 to 4	14	6.8	17	8.2	14	6.8	6	2.9	9	4.3	1	0.5	10	4.8	136	65.7
5 to 10	1	4.5	1	4.5	3	13.6	1	4.5	4	18.2	1	4.5	0	0	11	50.0
11 to 49	0	0	1	6.7	2	13.3	0	0	0	0	0	0	0	0	12	80.0
50+	0	0	2	33.3	1	16.7	0	0	0	0	0	0	0	0	3	50.0
Total	15	6.0	21	8.4	20	8.0	7	2.8	13	5.2	2	0.8	10	4.0	162	64.8

Base: all businesses (250)

Cost of Premises

E.65 Respondents were asked to quote an average expenditure they dedicated to their business premises (Table E.32). The vast majority of respondents 54.1% asserted they did not know how much was spent on their business premises per year. The majority of firms (25.2%) spent between £1,001-5,000 on their premises. Construction spent the lowest amount on their business premises (50% spent up to £500)

Table E.32 - Annual Expenditure on Business Premises (Total space)

Industry Sector	Cost of Premises											
	Up to £500		£501-£1,000		£1,001-£5,000		£5,001-£10,000		Over £100,000		Unknown/ n/a	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	0	0	1	7.7	3	23.1	0	0	1	7.7	8	61.5
Construction	0	0	0	0	1	33.3	0	0	0	0	2	66.7
Distribution and Wholesale	0	0	3	23.1	3	23.1	0	0	1	7.7	6	46.2
Transport and Communications	0	0	1	50.0	0	0	0	0	1	50.0	0	0
Banking, Finance and Insurance	3	23.1	0	0	4	21.1	1	5.3	0	0	11	57.9
Consultancy Services	1	50.0	2	11.8	4	23.5	2	11.8	0	0	8	47.1
Legal, Accounting, Advertising and Recruitment	0	0	0	0	3	42.9	0	0	0	0	4	57.1
Business Services	1	5.9	3	17.6	6	35.3	1	5.9	0	0	6	35.3
Other Services	1	5.0	0	0	4	20.0	0	0	0	0	15	75.0
Total	6	5.4	10	9.0	28	25.2	4	2.7	3	2.7	60	54.1

Base: all businesses not occupied on a freehold basis for which respondents gave an answer for the total floor space (111)

No. of Employees	Cost of Premises												Unknown/ n/a
	Up to £500		£500-£1,000		£1,001-£5,000		£5,001-£10,000		Over £100,000				
	No.	%	No.	%	No.	%	No.	%	No.	%			
1 to 4	6	6.8	8	9.1	24	27.3	3	3.4	1	1.1	46	52.3	
5 to 10	0	0	1	11.1	2	22.2	0	0	0	0	6	66.7	
11 to 49	0	0	1	11.1	1	11.1	0	0	2	22.2	5	55.6	
50+	0	0	0	0	1	20.0	1	20.0	0	0	3	60.0	
Total	6	5.4	10	9.0	28	25.2	4	3.6	3	2.7	60	54.1	

Base: all businesses not occupied on a freehold basis for which respondents gave an answer for the total floor space (111)

E.66 As Table E.33 indicates, businesses in Hammersmith and Fulham spend a mean average of £45,224 per annum on business premises. Transport and Communications are likely to spend the most (£303,600), whilst other services sector are likely to spend the least (£14,016).

Table E.33 – Mean Annual Expenditure on Business Premises (Total space)

Industry Sector	Base (no. respondents)	Mean (£)
Manufacturing	5	137,120
Construction	1	14,000
Distribution and Wholesale	7	32,714
Transport and Communications	2	303,600
Banking, Finance and Insurance	8	19,355
Consultancy Services	9	28,777
Legal, Accounting, Advertising and Recruitment	3	21,380
Other Business Services	11	20,236
Other Services	5	14,016
Total	51	45,224
No. Employees		
1 to 4	42	32,958
5 to 10	3	15,666
11 to 49	4	194,800
50+	2	48,000
Total	51	45,224

Base: all businesses not occupied on a freehold basis for which respondents gave a figure for the expenditure on total floor space other than 'do not know' (51)

E.67 In terms of value for money, the majority of respondents (75.6%) feel that the current rental level of their business premises (taking into consideration location and quality of the accommodation) offers good or fair value for money (Table E.34). A fifth (20.7%), feel that their premises are poor value for money. This is more likely amongst businesses in the transport and communication sector (100%) and least likely in the other services sector (10%).

Table E.34 – Value for Money of Rental Level

Industry Sector	Response							
	Good value		Fair Value		Poor value		Don't Know/ Not relevant	
	No.	%	No.	%	No.	%	No.	%
Manufacturing	3	23.1	5	38.5	5	38.5	0	0
Construction	0	0	2	66.7	1	33.3	0	0
Distribution and Wholesale	5	38.5	3	23.1	5	38.5	0	0
Transport and Communications	0	0	0	0	2	100.0	0	0
Banking, Finance and Insurance	6	31.6	11	57.9	2	10.5	0	0
Consultancy Services	6	35.3	5	29.4	3	17.6	3	17.6
Legal, Accounting, Advertising and Recruitment	4	57.1	3	42.9	0	0	0	0
Business Services	7	41.2	7	41.2	3	17.6	0	0
Other Services	15	75.0	2	10.0	2	10.0	1	5.0
Total	46	41.4	38	34.2	23	20.7	4	3.6

Base: all businesses not occupied on a freehold basis (111)

Industry Sector	Response							
	Good value		Fair Value		Poor value		Don't Know/ Not relevant	
	No.	%	No.	%	No.	%	No.	%
1 to 4	40	45.5	28	31.8	17	19.3	3	3.4
5 to 10	2	22.2	5	55.6	2	22.2	0	0
11 to 49	3	33.3	3	33.3	3	33.3	0	0
50 +	1	20.0	2	40.0	1	20.0	1	20.0
Total	46	41.4	38	34.2	23	20.7	4	3.6

Base: all businesses not occupied on a freehold basis (111)

KEY FINDINGS

- E.68 A large proportion of respondents occupy their business premises on a “leasehold” basis (41.4%), around a fifth (20.7%) of such firms have between 1 and 2 years remaining on their lease.
- E.69 The average firm occupies a mean of 3,746 square feet of floor space. 74% of firms dedicate at least some of this space to office activities, 50.1% of firms dedicate the majority of their space to offices. Only 9.3% of firms stated that they have any space dedicated to production, the exception being those in the manufacturing, 55% of firms in this sector have at least some space dedicated to production. 20% of firms have space dedicated to studio/flexible working arrangements; 11.6% of firms stated that they have space dedicated to storage and warehousing; 7.6% have space dedicated to showroom activities; 1.2% of firms stated that they have at least some vacant space and 6.4% of firms stated they had yard space. 6.4% of respondents stated that they dedicated space to other uses; the most popular stated other use was residential accommodation.
- E.70 A limited amount of respondents could answer questions relating to the price of accommodation. 29.2% of all firms stated that they spent between 1 and 25% of their annual turnover on accommodation. 23.2% stated that they spend up to £5,001-£10,000 on business premises per annum whilst 2.7% spent more than £100,000 each year.

- E.71 Most respondents felt that they obtained good or fair value for money from their premises (75.6%).

LOCAL LINKAGES

- E.72 This section sets out the results respondents gave to questions regarding local linkages, looking at travel to work patterns, and supplier and customer linkages

TRAVEL TO WORK PATTERNS

Catchment Area

- E.73 Respondents were asked to estimate the proportion of staff living locally within the London Borough of Hammersmith and Fulham.
- E.74 The majority of respondents estimated that at least some of its workforce lived within Hammersmith and Fulham (68.4%). 28.4% of respondents stated that none of its workforce live within the Borough. Approximately 33.2% of respondents stated that the majority of their workforce lived in Hammersmith and Fulham.
- E.75 Analysis by sector indicates that firms in the consultancy services sector and transport and communications were most likely to have their employees living within the Borough (45.5% of firms in each of the former and latter categories stated that at least some of its workers live in Hammersmith and Fulham). Firms in the distribution and wholesale sector were most likely to state that none of their employees lived in the borough (39.1%)

E.76 Respondents were asked to express the proportion of workforce living within the Borough (Table E.35). While 28.4% of the workforce in all categories do not live in the Borough, a majority of 33.2% do (have workforces between 76-100% from within the Borough).

Table E.35 - Percentage of Staff Living within the Borough

Industry Sector	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	7	35.0	5	25.0	1	5.0	0	0	7	35.0	0	0
Construction	3	33.3	1	11.1	1	11.1	0	0	4	44.4	0	0
Distribution and Wholesale	9	39.1	2	8.7	1	4.3	1	4.3	8	34.8	2	8.7
Transport and Communications	1	9.1	2	18.2	1	9.1	1	9.1	5	45.5	1	9.1
Banking, Finance and Insurance	7	17.9	8	20.5	14	35.9	1	2.6	8	20.5	1	2.6
Consultancy Services	11	27.5	4	10.0	6	15.0	1	2.5	18	45.0	0	0
Legal, Accounting, Advertisement and Recruitment	4	16.7	5	20.8	10	16.7	3	12.5	7	29.2	1	4.2
Other Business Services	14	35.0	0	0	10	0	0	0	14	35.0	2	5.0
Other Services	15	34.1	5	11.4	9	20.5	2	4.5	12	27.3	1	2.3
Total	71	28.4	32	12.8	47	18.8	9	3.6	83	33.2	8	3.2

Base: all businesses (250)

No. Employees	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	60	29.0	17	8.2	38	18.4	9	4.3	81	39.1	2	1.0
5 to 10	7	31.8	7	31.8	6	27.3	0	0	1	4.5	1	4.5
11 to 49	3	20.0	4	26.7	3	20.0	0	0	1	6.7	4	26.7
50+	1	16.7	4	66.7	0	0	0	0	0	0	1	16.7
Total	71	28.4	32	12.8	47	18.8	9	3.6	83	33.2	8	3.2

Base: all businesses (250)

E.77 Respondents were asked to express the proportion of workforce living within a 5 mile radius of the Borough. The outcome is shown in table E.36. It is evident that 64.8% of respondents lived within a 5 mile remit. The sectors most likely to have 76-100% of their workforce within a 5 mile radius are construction (44.4%); transport and communication (45.5%) and consultancy services (42.5%). It is clear that small firms have the largest proportion of workforce living within the remit of 5 miles (36.2% of firms stated they had workforces between 76-100% within the 5 mile remit).

Table E.36 – Proportion of Workforce Living within a Five Mile Radius

Industry Sector	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	7	35.0	5	25.0	1	5.0	0	0	6	30.0	1	5.0
Construction	3	33.3	1	11.1	1	11.1	0	0	4	44.4	0	0
Distribution and Wholesale	9	39.1	2	8.7	1	4.3	1	4.3	7	30.4	3	13.0
Transport and Communications	1	9.1	2	18.2	1	9.1	1	9.1	5	45.5	1	9.1
Banking, Finance and Insurance	7	17.9	8	20.5	13	33.3	1	2.6	8	20.5	2	5.1
Consultancy Services	11	27.5	4	10.0	6	15.0	1	2.5	17	42.5	1	2.5
Legal, Accounting, Advertisement and Recruitment	4	16.7	5	20.8	4	16.7	3	12.5	7	29.2	1	4.2
Other Business Services	16	40.0	0	0	10	25.0	0	0	12	30.0	2	5.0
Other Services	17	38.6	5	11.4	8	18.2	1	2.3	11	25.0	2	4.5
Total	75	30.0	32	12.8	45	18.0	8	3.2	77	30.8	13	5.2

Base: all businesses (250)

No. Employees	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	64	30.9	17	8.2	36	17.4	8	3.9	75	36.2	7	3.4
5 to 10	6	27.3	7	31.8	6	27.3	0	0	1	4.5	2	9.1
11 to 49	4	26.7	4	26.7	3	20.0	0	0	1	6.7	3	20.0
50+	1	16.7	4	66.7	0	0	0	0	0	0	1	16.7
Total	75	30.0	32	12.8	45	18.0	8	3.2	77	30.8	13	5.2

Base: all businesses (250)

Means of Transportation

- E.78 Respondents estimated the proportion of employees who travel to and from work by private car (Table E.37).
- E.79 The majority of respondents stated that none of their employees travel to work by car (54%). Employees in the other services sector were most likely to use the car as their means of transportation to work, with 25% of firms stating that 76-100% of their employees travelled by this means. Employees in the construction sector were least likely to travel to work by car. 77.8% of respondents representing this sector stated that none of their employees travel to work by car.

Table E.37 - Proportion of Workforce Who Travel to Work by Car

Industry Sector	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	13	65.0	2	10.0	1	5.0	0	0	1	5.0	3	15.0
Construction	7	77.8	0	0	1	11.1	0	0	1	11.1	0	0
Distribution and Wholesale	15	65.2	1	4.3	2	8.7	0	0	1	4.3	4	17.4
Transport and Communications	6	54.5	2	18.2	0	0	0	0	2	18.2	1	9.1
Banking, Finance and Insurance	19	48.7	4	10.3	5	12.8	0	0	7	17.9	4	10.3
Consultancy Services	19	47.5	4	10.0	5	12.5	1	2.5	9	22.5	2	5.0
Legal, Accounting, Advertisement and Recruitment	11	45.8	2	8.3	5	20.8	1	4.2	0	0	5	20.8
Other Business Services	20	50.0	5	12.5	3	7.5	0	0	10	25.0	2	5.0
Other Services	25	56.8	4	9.1	4	9.1	0	0	5	11.4	6	13.6
Total	135	54.0	24	9.6	26	10.4	2	0.8	36	14.4	27	10.8

Base: all businesses (250)

No. Employees	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	110	53.1	17	8.2	23	11.1	1	0.5	35	16.9	21	10.1
5 to 10	16	72.7	3	13.6	0	0	0	0	1	4.5	2	9.1
11 to 49	7	46.7	2	13.3	1	6.7	1	6.7	0	0	4	26.7
50+	2	33.3	2	33.3	2	33.3	0	0	0	0	0	0
Total	135	54.0	24	9.6	26	10.4	2	0.8	36	14.4	27	10.8

Base: all businesses (250)

E.80 When asked for the proportion of workforce that travels to work by bus 66.4% of respondents stated that none of their employees did (Table E.38). Least likely to have employees travelling by bus are employees in the transport construction sector. 100% of firms in this sector stated that any of their workforce used this mode of transport to work.

Table E.38 - Proportion of Workforce Who Travel to Work by Bus

Industry Sector	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	9	45.0	4	20.0	3	15	1	5.0	0	0	3	15.0
Construction	9	100	0	0	0	0	0	0	0	0	0	0
Distribution and Wholesale	14	60.9	2	8.7	3	13.0	0	0	0	0	4	17.4
Transport and Communications	6	54.5	3	27.3	0	0	0	0	1	9.1	1	9.1
Banking, Finance and Insurance	26	66.7	3	7.7	3	7.7	1	2.6	2	5.2	4	10.3
Consultancy Services	31	77.5	3	7.5	4	10.0	0	0	0	0	2	5.0
Legal, Accounting, Advertisement and Recruitment	16	66.7	2	8.3	1	4.2	0	0	0	0	5	20.8
Other Business Services	26	65.0	5	12.5	4	10.0	1	2.5	2	5.0	2	5.0
Other Services	29	65.9	4	9.1	3	6.8	0	0	2	4.5	6	13.6
Total	166	66.4	26	10.4	21	8.4	3	1.2	7	2.8	27	10.8

Base: all businesses (250)

No. Employees	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	145	70.0	15	7.2	17	8.2	2	1.0	7	3.4	21	10.1
5 to 10	13	59.1	5	22.7	1	4.5	1	4.5	0	0	2	9.1
11 to 49	5	33.3	4	26.7	2	13.3	0	0	0	0	4	26.7
50+	3	50.0	2	33.3	1	16.7	0	0	0	0	0	0
Total	166	66.4	26	10.4	21	8.4	3	1.2	7	2.8	27	10.8

Base: all businesses (250)

E.81 Tube/train appears to be the most popular mode of transport amongst employees of respondent firms (Table E.39). On average 53.2% of firms stated that none of their employees travelled to work by this means. Most likely to use this mode are workers in the legal, accounting, advertising and recruitment sector where only 25% of firms stated that none of their employees travelled to work by tube/train. Least likely to use this means are workers in the construction sector. 77.8% of respondents in this sector either did not know or stated that none of its workers travelled by tube of train.

Table E.39 - Proportion of Workforce Who Travel to Work by Tube/Train

Industry Sector	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	11	55.0	1	5.0	4	20.0	0	0	1	5.0	3	15.0
Construction	7	77.8	1	11.1	1	11.1	0	0	0	0	0	
Distribution and Wholesale	15	65.2	2	8.7	2	8.7	0	0	0	0	4	17.4
Transport and Communications	6	54.5	3	27.3	1	9.1	0	0	0	0	1	9.1
Banking, Finance and Insurance	23	59.0	4	10.3	6	15.4	2	5.1	0	0	4	10.3
Consultancy Services	22	55.0	0	0	10	25.0	3	7.5	3	7.5	2	5.0
Legal, Accounting, Advertisement and Recruitment	6	25.0	4	16.7	3	12.5	5	20.8	1	4.2	5	20.8
Other Business Services	25	62.5	2	5.0	7	17.5	1	2.5	3	7.5	2	5.0
Other Services	18	40.9	2	4.5	6	13.6	3	6.8	9	20.5	6	13.6
Total	133	53.2	19	7.6	40	16.0	14	5.6	17	6.8	27	10.8

Base: all businesses (250)

No. Employees	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	118	57.0	13	6.3	29	14.0	10	4.8	16	7.7	21	10.1
5 to 10	9	40.9	4	18.2	3	13.6	3	13.6	1	4.5	2	9.1
11 to 49	5	33.3	2	13.3	4	26.7	0	0	0	0	4	26.7
50+	1	16.7	0	0	4	66.7	1	16.7	0	0	0	0
Total	133	53.2	19	7.6	40	16.0	14	5.6	17	6.8	27	10.8

Base: all businesses (250)

E.82 Fewer respondents stated that any of its workforce walk to work (Table E.40). On average 56.4% of firms stated that none of its workforce walks. Firms in the construction sector are least likely to state that any of their employees walk to work. 88% of respondents in this sector stated that none of its workforce walked to work.

Table E.40 - Proportion of Workforce Who Walk to Work

Industry Sector	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	13	65.0	2	10.0	1	5.0	0	0	1	5.0	3	15.0
Construction	8	88.9	0	0	1	11.1	0	0	0	0	0	0
Distribution and Wholesale	15	65.2	1	4.3	2	8.7	0	0	1	4.3	4	17.4
Transport and Communications	7	63.6	2	18.2	0	0	0	0	1	9.1	1	9.1
Banking, Finance and Insurance	20	51.3	5	12.8	4	10.3	0	0	6	15.4	4	10.3
Consultancy Services	20	50.0	4	10.0	5	12.5	0	0	9	22.5	2	5.0
Legal, Accounting, Advertisement and Recruitment	11	45.8	2	8.3	5	20.8	1	4.2	0	0	5	20.8
Other Business Services	22	55.0	4	10.0	2	5.0	0	0	10	25.0	2	5.0
Other Services	25	56.8	4	9.1	4	9.1	0	0	5	11.4	6	13.6
Total	141	56.4	24	9.6	5.0	9.6	1	0.4	33	13.2	27	10.8

Base: all businesses (250)

No. Employees	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	113	54.6	17	8.2	23	11.1	1	0.5	32	15.5	21	10.1
5 to 10	17	77.3	2	9.1	0	0	0	0	1	4.5	2	9.1
11 to 49	9	60.0	1	6.7	1	6.7	0	0	0	0	4	26.7
50+	2	33.3	4	66.7	0	66.7	0	0	0	0	0	0
Total	141	56.4	24	9.6	24	9.6	1	0.4	33	13.2	27	10.8

Base: all businesses (250)

E.83 Cycling would appear to be the least popular mode of transport to work amongst respondent firms' employees (Table E.41). On average 71.2% of firms stated that none of its employees cycle, the most likely is the "other services" sector (89.5%).

Table E.41 - Proportion of Workforce Who Cycle to Work

Industry Sector	Percentage of Workforce											
	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
Manufacturing	15	75.0	1	5.0	1	5.0	0	0	0	0	3	15.0
Construction	8	88.9	0	0	0	0	1	11.1	0	0	0	0
Distribution and Wholesale	16	69.6	2	8.7	0	0	1	4.3	0	0	4	17.4
Transport and Communications	6	54.5	2	18.2	2	18.2	0	0	0	0	1	9.1
Banking, Finance and Insurance	30	76.9	3	7.7	1	2.6	0	0	1	2.6	4	10.3
Consultancy Services	29	72.5	4	10.0	3	7.5	0	0	2	5.0	2	5.0
Legal, Accounting, Advertisement and Recruitment	9	37.5	7	29.2	3	12.5	0	0	0	0	5	20.8
Other Business Services	32	80.0	6	15.0	0	0	0	0	0	0	2	5.0
Other Services	33	75.0	1	2.3	2	4.5	0	0	2	4.5	6	13.6
Total	178	71.2	26	10.4	12	4.8	2	0.8	5	2.0	27	10.8

Base: all businesses (250)

Percentage of Workforce

No. Employees	None		1-25%		26-50%		51-75%		76-100%		Don't know	
	No	%	No	%	No	%	No	%	No	%	No	%
1 to 4	155	74.9	13	6.3	11	5.3	2	1.0	5	2.4	21	10.1
5 to 10	12	54.5	7	31.8	1	4.5	0	0	0	0	2	9.1
11 to 49	8	53.3	3	20.0	0	0	0	0	0	0	4	26.7
50+	3	50.0	3	50.0	0	0	0	0	0	0	0	0
Total	178	71.2	26	10.4	12	4.8	2	0.8	5	2.0	27	10.8

Base: all businesses (250)

INPUT AND OUTPUT

E.84 Businesses were asked to estimate the proportions of suppliers and customers located in a number of geographical areas.

Supplier Linkages

E.85 As Table E.42 illustrates 34% of respondents stated that they have suppliers based in Hammersmith and Fulham. Least likely to have suppliers in the Borough were those in the manufacturing sector where 75% of firms stated that none of their suppliers were based in the Borough. Most likely to source their supplies from within the Borough were companies based in the construction sector. Only 22.2% of those in this sector did not have any suppliers based in Hammersmith and Fulham. 4.4% of respondents were unsure whether or not they had any suppliers situated within the Borough.

Table E.42 - Proportion of Suppliers Based in Hammersmith and Fulham

Industry Sector	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	15	75.0	3	15.0	1	5.0	1	5.0	0	0	0	0
Construction	2	22.2	1	11.1	1	11.1	0	0	5	55.6	0	0
Distribution and Wholesale	15	65.2	5	21.7	1	4.3	1	4.3	1	4.3	0	0
Transport and Communications	9	81.8	0	0	0	0	0	0	1	9.1	1	9.1
Banking, Finance and Insurance	27	69.2	4	10.3	5	12.8	0	0	2	5.1	1	2.6
Consultancy Services	21	52.5	7	17.5	4	10.0	0	0	8	20.0	0	0
Legal, Accounting, Advertisement and Recruitment	14	58.3	5	20.8	0	0	0	0	2	8.3	3	12.5
Other Business Services	24	60.0	9	22.5	1	0	1	2.5	3	7.5	2	5.0
Other Services	27	61.4	3	6.8	5	11.4	1	2.3	4	9.1	4	9.1
Total	154	61.6	37	14.8	18	7.2	4	1.6	26	10.4	11	4.4

Base: all businesses (250)

No. Employees	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	128	61.8	25	12.1	17	8.2	4	1.9	24	11.6	9	4.3
5 to 10	12	54.5	7	31.8	0	0	0	0	2	9.1	1	4.5
11 to 49	11	73.3	3	20.0	0	0	0	0	0	0	1	6.7
50+	3	50.0	2	33.3	1	16.7	0	0	0	0	0	0
Total	154	61.6	37	14.8	18	7.2	4	1.6	26	10.4	11	4.4

Base: all businesses (250)

E.86 The majority of firms across all sectors (51.6%) stated that at least some of their suppliers were based in Central London (Table E.43). Transport and

Communications firms were least likely to have suppliers in Central London (66.7% had none). Firms in the legal, accounting, advertisement and recruitment sector were most likely to have the majority of suppliers located in the rest of London. 32.8% of firms stated between 51 and 100% of supplies came from the rest of London

Table E.43 - Proportion of Suppliers Based in Rest of London

Industry Sector	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	13	65.0	0	0	2	10.0	2	10.0	3	15.0	0	0
Construction	6	66.7	1	11.1	1	11.1	1	11.1	0	0	0	0
Distribution and Wholesale	12	52.2	3	13.0	1	4.3	1	4.3	5	21.7	1	4.3
Transport and Communications	7	63.7	0	0	0	0	0	0	3	27.3	1	9.1
Banking, Finance and Insurance	17	43.6	3	7.7	4	10.3	1	2.6	13	33.3	1	2.6
Consultancy Services	19	47.5	3	7.5	4	10.0	1	2.5	13	32.5	0	0
Legal, Accounting, Advertisement and Recruitment	9	37.5	1	4.2	1	4.2	0	0	10	41.7	3	12.5
Other Business Services	20	50.0	0	0	6	15.0	2	5.0	11	27.5	1	2.5
Other Services	18	40.9	1	2.3	5	11.4	1	2.3	15	34.1	4	9.1
Total	121	48.4	12	4.8	24	9.6	9	3.6	73	29.2	11	4.4

Base: all businesses (250)

No. Employees	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	101	48.8	10	4.8	20	9.7	8	3.9	59	28.5	9	4.3
5 to 10	10	45.5	2	9.1	2	9.1	0	0	7	31.8	1	4.5
11 to 49	8	53.3	0	0	2	13.3	0	0	4	26.7	1	6.7
50+	2	33.3	0	0	0	0	1	16.7	3	50.0	0	0
Total	121	48.4	12	4.8	24	9.6	9	3.6	73	29.2	11	4.4

Base: all businesses (250)

E.87 The majority of respondents (90.4%) stated that none of their supplies came from the wider South-East region as indicated in Table E.44.

Table E.44 – Proportion of Suppliers Based in Rest of South East

Industry Sector	Percentage of Suppliers									
	0%		1-25%		26-50%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	17	85.0	1	5.0	1	5.0	1	5.0	0	0
Construction	9	100	0	0	0	0	0	0	0	0
Distribution and Wholesale	22	95.7	0	0	0	0	0	0	1	4.3
Transport and Communications	10	90.9	0	0	0	0	0	0	1	9.1
Banking, Finance and Insurance	36	92.3	2	5.1	0	0	0	0	1	2.6
Consultancy Services	39	97.5	1	2.5	0	0	0	0	0	0
Legal, Accounting, Advertisement and Recruitment	21	87.5	0	0	0	0	0	0	3	12.5
Other Business Services	32	80.0	4	10.0	2	5.0	1	2.5	1	2.5
Other Services	40	90.9	0	0	0	0	0	0	0	0
Total	226	90.4	8	3.2	3	1.2	2	0.8	11	4.4

Base: all businesses (250)

No. Employees	Percentage of Suppliers									
	0%		1-25%		26-50%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	190	91.8	5	2.4	2	1.0	1	0.5	9	4.3
5 to 11	20	90.9	0	0	0	0	1	4.5	1	4.5
11 to 49	11	73.3	2	13.3	1	6.7	0	0	1	6.7
50+	5	83.3	1	16.7	0	0	0	0	0	0
Total	226	90.4	8	3.2	3	1.2	2	0.8	11	4.4

Base: all businesses (250)

E.88 Approximately half of the respondents (49.2%) stated that none of their supplies were sourced nationally as illustrated in Table E.45. 4.4% were not sure.

Table E.45 - Proportion of Suppliers Based Nationally

Industry Sector	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	6	30.0	2	10.0	4	20.0	0	0	8	40.0	0	0
Construction	5	55.6	1	11.1	2	22.2	0	0	1	11.1	0	0
Distribution and Wholesale	12	52.6	2	8.7	2	8.7	0	0	6	26.1	1	4.3
Transport and Communications	6	54.5	0	0	1	9.1	0	0	3	27.3	1	9.1
Banking, Finance and Insurance	20	51.3	1	2.6	5	12.8	1	2.6	11	28.2	1	2.6
Consultancy Services	23	57.5	5	12.5	2	5.0	0	0	10	25.0	0	0
Legal, Accounting, Advertisement and Recruitment	9	37.5	3	12.5	1	4.2	1	4.2	7	29.2	3	12.5
Other Business Services	19	47.5	7	17.5	3	7.5	1	2.5	9	22.5	1	2.5
Other Services	27	61.4	2	4.5	2	4.5	0	0	9	20.5	4	9.1
Total	127	50.8	23	9.2	22	8.8	3	1.2	64	25.6	11	4.4

Base: all businesses (250)

No. Employees	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	108	52.2	17	8.2	17	8.2	3	1.4	53	25.6	9	4.3
5 to 10	8	36.4	3	13.6	3	13.6	0	0	7	31.8	1	4.5
11 to 49	7	46.7	2	13.3	1	6.7	0	0	4	26.7	1	6.7
50+	4	66.7	1	16.7	1	16.7	0	0	0	0	0	0
Total	127	50.8	23	9.2	22	8.8	3	1.2	64	25.6	11	4.4

Base: all businesses (250)

E.89 Fewer respondents stated that they had any international suppliers (Table E.46). On average 79.2% of respondents stated that they had no international suppliers, whilst a further 3.6% were unsure.

E.90 Firms in the transport and communications sector were most likely to have an international supply base.

Table E.46 – Proportion of Suppliers Based Internationally

Industry Sector	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	15	75.0	2	10.0	2	10.0	0	0	1	5.0	0	0
Construction	8	88.9	0	0	1	11.1	0	0	0	0	0	0
Distribution and Wholesale	15	65.2	1	4.3	2	8.7	1	4.3	4	17.4	0	0
Transport and Communications	7	63.6	0	0	1	9.1	0	0	2	18.2	1	9.1
Banking, Finance and Insurance	33	84.6	3	7.7	0	0	0	0	2	5.1	1	2.6
Consultancy Services	36	90.0	2	5.0	0	0	0	0	2	5.0	0	0
Legal, Accounting, Advertisement and Recruitment	21	87.5	0	0	0	0	0	0	0	0	3	12.5
Other Business Services	30	75.0	3	7.5	1	2.5	1	2.5	4	10.0	1	2.5
Other Services	33	75.0	2	4.5	1	2.3	0	0	5	11.4	3	6.8
Total	198	79.2	13	5.2	8	3.2	2	0.8	20	8.0	9	3.6

Base: all businesses (250)

No. Employees	Percentage of Suppliers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	166	80.2	10	4.8	7	3.4	1	0.5	16	7.7	7	3.4
5 to 10	19	86.4	1	4.5	0	0	0	0	1	4.5	1	4.5
11 to 49	8	53.3	2	13.3	1	6.7	1	6.7	2	13.3	1	6.7
50+	5	83.3	0	0	0	0	0	0	1	16.7	0	0
Total	198	79.2	13	5.2	6	3.2	2	0.8	20	8.0	9	3.6

Base: all businesses (250)

Customer Linkages

- E.91 A large proportion of respondents (55.2%) stated that they have no customers based in the London Borough of Hammersmith and Fulham (Table E.47). 44.8% of businesses have at least some of their customers based within the borough, whilst 14.8% stated that the majority of business is done in Hammersmith and Fulham.
- E.92 Distribution and wholesale are most likely to have local customers, 86.9% of respondent firms stated that they had customers within the borough. Consultancy firms are the least likely.
- E.93 Medium sized firms (between 11-49 employees) are much more likely than smaller firms and firms with 50 or more employees to have customers based in Hammersmith and Fulham.

Table E.47 – Proportion of Customers Based in Hammersmith and Fulham

Industry Sector	Percentage of Customers									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	8	40.0	4	20.0	2	10.0	1	5.0	5	25.0
Construction	3	33.3	1	11.1	1	11.1	0	0	4	44.4
Distribution and Wholesale	5	21.7	5	21.7	4	17.4	2	8.7	7	30.4
Transport and Communications	8	72.7	1	9.1	0	0	1	9.1	1	9.1
Banking, Finance and Insurance	17	43.6	4	10.3	5	12.8	3	7.7	10	25.6
Consultancy Services	29	72.5	6	15.0	1	2.5	3	7.5	1	2.5
Legal, Accounting, Advertisement and Recruitment	14	58.3	8	33.3	0	0	2	8.3	0	0
Other Business Services	26	65.0	7	17.5	4	10.0	0	0	3	7.5
Other Services	28	63.6	5	11.4	4	9.1	1	2.3	6	13.6
Total	138	55.2	41	16.4	21	8.4	13	5.2	37	14.8

Base: all businesses (250)

Industry Sector	Percentage of Customers									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	117	56.5	31	15.0	19	9.2	12	5.8	28	13.5
5 to 10	9	40.9	4	18.2	2	9.1	1	4.5	6	27.3
11 to 49	8	53.3	4	26.7	0	0	0	0	3	20.0
50+	4	66.7	2	33.3	0	0	0	0	0	0
Total	138	55.2	41	16.4	21	8.4	13	5.2	37	14.8

Base: all businesses (250)

E.94 59.2% of those businesses interviewed have some customers within the rest of London (Table E.48). The construction sector has the greatest reliance upon the rest of London for its customer base with around 77.7% of

businesses having at least some customers in Central London. According to analysis by number of employees, smaller based firms are more likely to have customers in the rest of London

Table E.48 - Proportion of Customers Based in Rest of London

Industry Sector	Percentage of Customers									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	7	35.0	6	30.0	3	15.0	2	10.0	2	10.0
Construction	2	22.2	3	33.3	1	11.1	0	0	3	33.3
Distribution and Wholesale	8	34.8	4	17.4	7	30.4	2	8.7	2	100
Transport and Communications	8	72.7	1	9.1	2	18.2	0	0	0	0
Banking, Finance and Insurance	12	30.8	9	23.1	9	23.1	4	10.3	5	12.8
Consultancy Services	19	47.5	3	7.5	9	22.5	2	5.0	7	17.5
Legal, Accounting, Advertisement and Recruitment	6	25.0	2	8.3	4	16.7	5	20.8	7	29.2
Other Business Services	17	42.5	4	10.0	6	15.0	5	12.5	8	20.0
Other Services	23	52.3	5	11.4	7	15.9	0	0	9	20.5
Total	102	40.8	37	14.8	48	19.2	20	8.0	43	17.2

Base: all businesses (250)

Industry Sector	Percentage of Customers									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	83	40.1	26	12.6	43	20.8	17	8.2	38	18.4
5 to 10	8	36.4	6	27.3	3	13.6	3	13.6	2	9.1
11 to 49	8	53.3	3	20.0	2	13.3	0	0	2	13.3
50+	3	50.0	2	33.3	0	0	0	0	1	16.7
Total	102	40.8	37	14.8	48	19.2	20	8.0	43	17.2

Base: all businesses (250)

E.95 As Table E.49 indicates, the majority (91.2%) of respondents stated that they did not have any customers based within the rest of the South East. Only 1.2% of respondents on average stated that the majority of their customers were based within the region. The consultancy services and other business services sectors are the most likely to have some of its customer base within the South East.

Table E.49 – Proportion of Customers Based in Rest of South East

Industry Sector	Percentage of Customers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	18	90.0	2	10.0	0	0	0	0	0	0	0	0
Construction	8	88.9	1	11.1	0	0	0	0	0	0	0	0
Distribution and Wholesale	22	95.7	1	4.3	0	0	0	0	0	0	0	0
Transport and Communications	10	90.9	1	9.1	0	0	0	0	0	0	0	0
Banking, Finance and Insurance	39	100	0	0	0	0	0	0	0	0	0	0
Consultancy Services	33	82.5	1	2.5	3	7.5	0	0	2	5.0	1	2.5
Legal, Accounting, Advertisement and Recruitment	23	95.8	0	0	0	0	0	0	1	4.2	0	0
Other Business Services	33	82.5	5	12.5	1	2.5	1	2.5	0	0	0	0
Other Services	42	95.5	2	4.5	0	0	0	0	0	0	0	0
Total	228	91.2	13	5.2	4	1.6	1	0.4	3	1.2	1	0.4

Base: all businesses (250)

No. Employees	Percentage of Customers											
	0%		1-25%		26-50%		51-75%		76-100%		Don't Know/ N/A	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	190	91.8	10	4.8	4	1.9	0	0	2	1.0	1	0.5
5 to 10	20	90.9	0	0	0	0	1	4.5	1	4.5	0	0
11 to 49	13	86.7	2	13.3	0	0	0	0	0	0	0	0
50+	5	83.3	1	16.7	0	0	0	0	0	0	0	0
Total	228	91.2	13	5.2	4	1.6	1	0.4	3	1.2	1	0.4

Base: all businesses (250)

E.96 Table E.50 shows that approximately half of the customers come from a national base. Firms in the construction are least likely to have customers from a “national” base. The transport and communications sector is the most likely to have a national customer base (63.6%, of firms have customer bases ranging from 76-100% in this category).

Table E.50 – Proportion of Customers Based Nationally

Industry Sector	Percentage of Customers									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	10	50.0	2	10	4	20.0	0	0	4	20.0
Construction	8	88.9	1	11.1	0	0	0	0	0	0
Distribution and Wholesale	15	65.2	2	8.7	2	8.7	0	0	4	17.4
Transport and Communications	2	18.2	1	9.1	1	9.1	0	0	7	63.6
Banking, Finance and Insurance	22	56.4	3	7.7	7	17.9	2	5.1	5	12.8
Consultancy Services	20	50.0	4	10.0	8	20.0	2	5.0	6	15.0
Legal, Accounting, Advertisement and Recruitment	10	41.7	3	12.5	4	16.7	1	4.2	6	25.0
Other Business Services	17	42.5	7	17.5	5	12.5	2	5.0	9	22.5
Other Services	22	50.0	5	11.4	2	4.5	1	2.3	14	31.8
Total	126	50.4	28	11.2	33	13.2	8	3.2	55	22.0

Base: all businesses (250)

No. of Employees	Percentage of Customers									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	106	51.2	24	11.6	27	13.0	6	2.9	44	21.3
5 to 10	12	54.5	2	9.1	2	9.1	1	4.5	5	22.7
11 to 49	7	46.7	1	6.7	2	13.3	0	0	5	33.3
50+	1	16.7	1	16.7	2	33.3	1	16.7	1	16.7
Total	126	50.4	28	11.2	33	13.2	8	3.2	55	22.0

Base: all businesses (250)

E.97 74.4% of respondent firms stated that they did not have any international customers (Table E.51). Companies in the consultancy services sector are

much more likely than alternative sectors to have an international customer base – 42.5% of firms stated that they had some international customers. Other business services and other services sectors and larger firms were also more likely to have international customers.

Table E.51 – Proportion of Customers Based Internationally

Industry Sectors	Percentage of Customers									
	None %		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	16	80.0	2	10.0	0	0	1	5.0	1	5.0
Construction	8	88.9	1	11.1	0	0	0	0	0	0
Distribution and Wholesale	22	95.7	1	4.3	0	0	0	0	0	0
Transport and Communications	9	81.8	1	9.1	0	0	0	0	1	9.1
Banking, Finance and Insurance	32	82.1	4	10.3	2	5.1	0	0	1	2.6
Consultancy Services	23	57.5	7	17.5	3	7.5	2	5.0	5	12.5
Legal, Accounting, Advertisement and Recruitment	21	87.5	1	4.2	1	4.2	0	0	1	4.2
Other Business Services	26	65.0	8	20.0	1	2.5	1	2.5	4	10.0
Other Services	29	65.9	8	18.2	2	4.5	1	2.3	4	9.1
Total	186	74.4	33	13.2	9	3.6	5	2.0	17	6.8

Base: all businesses (250)

No. of Employees	Percentage of Customers									
	0%		1-25%		26-50%		51-75%		76-100%	
	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	153	73.9	30	14.5	6	2.9	4	1.9	14	6.8
5 to 10	19	86.4	2	9.1	1	4.5	0	0	0	0
11 to 49	12	80.0	0	0	0	0	1	6.7	2	13.3
50+	2	33.3	1	16.7	2	33.3	0	0	1	16.7
Total	186	74.4	33	13.2	9	3.6	5	2.0	17	6.8

Base: all businesses (250)

KEY FINDINGS

- E.98 The findings from the business survey illustrated in this section have shown that a large proportion of staff employed by respondent firms live, as well as work, within the London Borough of Hammersmith and Fulham. 68.4% of respondents stated that at least some of its workforce lives within the Borough, whilst 33.2% stated that the majority of their employees are Hammersmith and Fulham residents.
- E.99 The most popular mode of transport to work by employees of respondents was tube/train. 36% of respondents stated that at least some of its staff used this mode of transport to get to work. 35.2% of respondents stated that at least some of its employees travelled by car, 22.8% stated that employees used the bus, 32.8% have employees who walk and 18% have employees who cycle.
- E.100 With regard to supplier linkages 34% of respondents stated that at least some of their suppliers were based within the Borough. 47.2% of businesses have suppliers in the rest of London; 5.2% have suppliers based in the wider South-East region, 44.8% have suppliers based across the UK; and 17.2% have suppliers based abroad.
- E.101 The business survey also demonstrates that the majority (44.8%) of firms have at least some of their customers based within Hammersmith and Fulham. 59.2% of businesses have customers based across the rest of

London; 8.4 % have customers based in the wider South East; 49.6% have customers based in other parts of the country and 25.6% have international customers.

EXPANSION AND RELOCATION PLANS

E.102 This section looks at respondents' plans for future expansion and relocation. This includes whether businesses are likely to expand and planned areas for investment, whether Hammersmith and Fulham Borough Council has been contacted for assistance in expansion plans, whether firms have considered relocating further a field, preferred locations, floor space and premises requirements, and the availability of premises within the Borough.

EXPANSION AND AREAS OF INVESTMENT

E.103 Respondents were asked a series of questions about their future plans for investment and expansion.

E.104 32% of respondents have plans to expand in the next ten years (Table E.52). Firms most likely are those in the banking, finance and insurance sector, where 43.6% have expansion plans. Firms in the construction sector are least likely to expand – 55.6% in this sector stated that they were not going to expand (against 44.4% in this sector who said they would).

E.105 Mid size firms are more likely to expand than small and larger firms (firms with employee bases of 11-49).

Table E.52 - Whether Business will expand in the Next Ten Years

Industry Sector	Yes		No		Don't know	
	No.	%	No.	%	No.	%
Manufacturing	5	25.0	11	55.0	4	20.0
Construction	4	44.4	5	55.6	0	0
Distribution and Wholesale	4	17.4	12	52.2	7	30.4
Transport and Communications	3	27.3	4	36.4	4	36.4
Banking, Finance and Insurance	17	43.6	15	38.5	7	17.9
Consultancy Services	14	35.0	16	40.0	10	25.0
Legal, Accounting, Advertising and Recruitment	5	20.8	14	58.3	5	20.8
Other Business Services	15	37.5	18	45.0	7	17.5
Other Services	13	29.5	23	52.3	8	18.2
Total	80	32.0	118	47.2	52	20.8
No. Employees						
1 to 4	61	29.5	103	49.8	43	20.8
5 to 10	8	36.4	11	50.0	3	13.6
11 to 49	7	46.7	3	20.0	5	33.3
50+	4	66.7	1	16.7	1	16.7
Total	80	32.0	118	47.2	52	20.8

Base: all businesses (250)

E.106 Of the 80 respondents who stated that their firms were going to expand (Table E.53), on average 81.3% stated that it would be through the employment of additional staff. Those in the legal, accounting, advertising and recruitment and transport sectors were most likely to expand through recruitment – 100% of firms in each category planned to take on new staff. Firms in the consultancy services sector were most likely to expand through investment in plant (60%) and those in the distribution and wholesale were most likely to invest in new machines and plant (50% of firms in the former categories).

E.107 Larger firms appear more likely to invest in additional staff. 77% of firms with 1-4 staff planned to recruit new staff compared with 100% of firms with 50 or more employees.

Table E.53 – Which Of the Following Are You Planning to Invest In?

Industry Sector	Factors Planning to Invest													
	New Plant		New Machines		Additional Staff		Getting more Clients		New Premises		Don't Know Yet		New Services	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing	2	40.0	3	60.0	4	80.0	0	0	2	40.0	0	0	0	0
Construction	0	0	1	25.0	3	75.0	0	0	1	25.0	0	0	0	0
Distribution and Wholesale	2	50.0	2	50.0	3	75.0	0	0	0	0	0	0	0	0
Transport and Communications	1	33.3	1	33.3	3	100	0	0	0	0	0	0	0	0
Banking, Finance and Insurance	7	41.2	6	35.3	15	88.2	0	0	2	11.8	0	0	0	0
Consultancy Services	1	7.1	3	21.4	13	92.9	0	0	5	35.7	0	0	1	7.1
Legal, Accounting, Advertising and Recruitment	1	20.0	2	40.0	5	100	0	0	0	0	0	0	0	0
Other Business Services	1	6.7	3	20.0	11	73.3	2	13.3	0	0	2	13.3	1	6.7
Other Services	3	23.1	5	38.5	8	61.5	2	15.4	3	23.1	0	0	0	0
Total	18	22.5	26	32.5	65	81.3	4	5.0	13	16.3	2	2.5	2	2.5

Base: For all those who answered that they planned to expand their business (80)

No. Employees	Factors Planning to Invest													
	New Plant		New Machines		Additional Staff		Getting more Clients		New Premises		Don't know Yet		New Services	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	14	23.0	21	34.4	47	77.0	3	4.9	10	16.4	2	3.3	2	3.3
5 to 10	1	12.5	1	12.5	7	87.5	1	12.5	1	12.5	0	0	0	0
11 to 49	2	28.6	2	28.6	7	100	0	0	1	14.3	0	0	0	0
50+	1	25.0	2	50.0	4	100	0	0	1	25.0	0	0	0	0
Total	18	22.5	26	32.5	65	81.3	4	5.0	13	16.3	2	2.5	2	2.5

Base: for all those business's that answered they planned to expand their business (80)



Additional Staff

E.108 Those respondents who had mentioned plans to take on additional staff were asked to estimate the number of full and part-time staff they envisage employing (Table E.54).

E.109 Over two-thirds (32.3%) of those firms planning to take on additional full-time staff expected to employ between 1 and 5 additional members. Approximately 30.8% expected to take on ten or more members of staff and of this percentage, 1.4% dedicate more than 50 people. Larger firms are more likely to take on greater number of new employees.

Table E.54 - Additional Full Time Staff Required

Industry Sector	Number of Employees Required											Don't Know	
	1-5		6-10		11-20		21-50		51+				
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	
Manufacturing	2	50.0	0	0	0	0	1	25.0	0	0	1	25.0	
Construction	1	33.3	0	0	0	0	0	0	1	33.3	1	33.3	
Distribution and Wholesale	1	33.3	1	33.3	1	33.3	0	0	0	0	0	0	
Transport and Communications	0	0	0	0	0	0	1	33.3	0	0	2	66.7	
Banking, Finance and Insurance	3	20.0	2	13.3	1	6.7	0	0	0	0	9	60.0	
Consultancy Services	4	30.8	4	30.8	1	7.7	1	7.7	0	0	3	23.1	
Legal, Accounting, Advertising and Recruitment	3	60.0	1	20.0	1	20.0	0	0	0	0	0	0	
Other Business Services	3	27.3	1	9.1	1	9.1	0	0	0	0	6	54.5	
Other Services	4	50.0	1	12.5	0	0	1	12.5	0	0	2	25.0	
Total	21	32.3	10	15.4	5	7.7	4	6.2	1	1.5	24	36.9	

Base: all businesses which plan to take on additional staff (65)

Number of Employees Required												
No. of Employees	1-5		6-10		11-20		21-50		51+		Don't Know	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	19	40.4	7	14.9	1	2.1	0	0	1	2.1	19	40.4
5 to 10	2	28.6	1	14.3	2	28.6	0	0	0	0	2	28.6
11 to 49	0	0	1	14.3	1	14.3	2	28.6	0	0	3	42.9
50+	0	0	1	25.0	1	25.0	2	50.0	0	0	0	0
Total	21	32.3	10	15.4	5	7.7	4	6.2	1	1.5	24	36.9

Base: all businesses which plan to take on additional staff (65)

E.110 With regard to additional part-time staff required, it is evident that 52.3% of firms do not wish to expand their base, while 35.4% suggested they did not know (Table E.55). This suggests that there is no urgency in employing part-time staff. The most likely sector to employ more part-time staff are “the other services” sector. Smaller based firms are more likely to want to employ smaller amounts of part-time people, as opposed to larger firms who are more likely to employ larger amounts of part-time staff.

Table E.55 - Additional Part-Time Staff Required

Industry Sector	Number of Part-Time Employees Required							
	None		1-5		21-50		Don't Know	
	No.	%	No.	%	No.	%	No.	%
Manufacturing	2	50.0	1	25.0	0	0	1	25.0
Construction	1	33.3	1	33.3	0	0	1	33.3
Distribution and Wholesale	3	100	0	0	0	0	0	0
Transport and Communications	0	0	1	33.3	0	0	2	66.7
Banking, Finance and Insurance	7	46.7	0	0	0	0	8	53.3
Consultancy Services	11	84.6	0	0	0	0	2	15.4
Legal, Accounting, Advertisement and Recruitment	4	80.0	1	20.0	0	0	0	0
Other Business Services	3	27.3	1	9.1	0	0	7	63.6
Other Services	3	37.5	2	25.0	1	12.5	2	25.0
Total	34	52.3	7	10.8	1	1.5	23	35.4

Base: all businesses which plan to take on additional staff (65)²⁵

No. of Employees	No. of Part-Time Employees Required							
	None		1-5		21-50		Don't Know	
	No.	%	No.	%	No.	%	No.	%
1 to 4	25	53.2	5	10.6	0	0	17	36.2
5 to 10	3	42.9	1	14.3	0	0	3	42.9
11 to 49	3	42.9	1	14.3	0	0	3	42.9
50+	3	75.0	0	0	1	25.0	0	0
Total	34	52.3	7	10.8	1	1.5	23	35.4

Base: all businesses which plan to take on additional staff (65)

²⁵ Note very small sample size of each industry sector when comparing percentages

Additional Floor Space

E.111 Respondents were also asked to say whether their planned expansion would require additional floor space (Table E.56).

E.112 57.5% of firms with expansion plans envisaged requiring additional floor space, with firms in the distribution and consultancy services sector (85.7%) most likely to have such a requirement.

Table E.56 – Whether Expansion will require Additional Floor Space

Industry Sector	Response					
	Yes		No		Don't know	
	No.	%	No.	%	No.	%
Manufacturing	4	80.0	1	20.0	0	0
Construction	2	50.0	2	50.0	0	0
Distribution and Wholesale	2	50.0	2	50.0	0	0
Transport and Communications	1	33.3	0	0	2	66.7
Banking, Finance and Insurance	8	47.1	8	47.1	1	5.9
Consultancy Services	12	85.7	2	14.3	0	0
Legal, Accounting, Advertisement and Recruitment	2	40.0	3	60.0	0	0
Other Business Services	9	60.0	5	33.3	1	6.7
Other Services	6	46.2	7	53.8	0	0
Total	46	57.5	30	37.5	4	5.0
No. Employees						
1 to 4	34	55.7	25	41.0	2	3.3
5 -10	6	75.0	2	25.0	0	0
11 to 49	4	57.1	1	14.3	2	28.6
50+	2	50.0	2	50.0	0	0
Total	46	57.5	30	37.5	4	5.0

Base: all businesses with plans to expand (80)

E.113 Those respondents who do envisage requiring additional floor space were asked to estimate the area of additional space they would need (Table E.57).

E.114 A large proportion of respondents did not know how much additional floorspace would be necessary for expansion (47.8%). Of those who gave responses, 19.6% suggested 1-500 square feet were needed and 17.4% suggested that 501-1000 was needed.

Table E.57 – Additional Floor Space Required (In Square Feet)

Industry Sector	Approximate Additional floor space Required (Sq/ft)														Don't Know	
	1-500		501-1000		1001-2000		2001-3000		3001-4000		4001-5000		5001-10,000			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%		
Manufacturing	0	0	2	50.0	0	0	0	0	1	25.0	1	25.0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0	0	0	0	1	50.0	1	50.0
Distribution and Wholesale	0	0	0	0	0	0	1	50.0	0	0	0	0	0	0	1	50.0
Transport and Communications	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	100
Banking, Finance and Insurance	1	12.5	1	12.5	1	12.5	0	0	0	0	0	0	0	0	6	75.0
Consultancy Services	2	16.7	2	16.7	1	8.3	0	0	0	0	0	0	1	8.3	4	33.3
Legal, Accounting, Advertisement and Recruitment	0	0	1	50.0	0	0	0	0	0	0	0	0	0	0	1	50.0
Business Services	3	33.3	1	11.1	0	0	0	0	0	0	0	0	0	0	5	55.6
Other Services	2	33.3	1	16.7	0	0	0	0	0	0	0	0	0	0	3	50.0
Total	9	19.6	8	17.4	2	4.3	1	2.2	1	2.2	1	2.2	2	4.3	22	47.8

Base: all businesses that require additional space (46).

Approximate Additional floor space Required (Sq/ft)

No. of Employees	1-500		500-1000		1001-2000		2001-3000		3001-4000		4001-5000		5001-10,000		Don't Know	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1 to 4	9	26.5	6	17.6	1	2.9	0	0	1	2.9	0	0	1	2.9	16	47.1
5 to 11	0	0	0	0	1	16.7	1	16.7	0	0	0	0	0	0	4	66.7
11 to 49	0	0	1	25.0	0	0	0	0	0	0	1	25.0	0	0	2	50.0
50+	0	0	1	50.0	0	0	0	0	0	0	0	0	1	50.0	0	0
Total	9	19.6	8	17.4	2	4.3	1	2.2	1	2.2	1	2.2	2	4.3	22	47.8

Base: all businesses that require additional space (46)

E.115 Of the 46 respondents who asserted they desired additional floorspace, 24 firms responded with the amount of floorspace they required (Table E.58). The overall mean floorspace desired was 1,791 square feet. The construction sector was the most likely sector to require the most space with a mean value of 8,611 square feet. Smaller firms required the most space with an average of 1,172 square feet.

Table E.58 – Additional Floor Space Required (Square Feet)

Base: All those who gave a response other than "don't know" (24)

Industry Sector	Base (no. respondents)	Mean (sq/ft)
Manufacturing	4	2625
Construction	1	8611.41
Distribution & Wholesale	1	3000
Banking, Finance & Insurance etc	2	869.11
Consultancy Services	8	1857.64
Legal, Accounting, Advertising & Recruitment	1	750
Other Business Services	4	435.07
Other Services	3	600
Total	24	1791.71
No. Employees		
1 to 4	18	1172.28
5 to 10	2	2500
11 to 49	2	2950
50+	2	5500
Total	24	1791.71

E.116 Respondents who stated that their business would require additional floor space were asked whether their requirements for additional floor space could be accommodated on their current site through a number of measures (Table E.59). 6.5% of respondents stated that redevelopment could be the most likely measure of expansion. 76.1% of responses stated “none of these” and 15.2% “don’t know”, indicating expansion could not be accommodated on their existing site.

Table E.59 – Measures to Accommodate Expansion on Existing Site

Industry Sector	Measures to Accommodate Expansion on Existing Site							
	Redevelopment		More intensive use of space		None of the above		Don't Know	
	No.	%	No.	%	No.	%	No.	%
Manufacturing	0	0	0	0	4	100	0	0
Construction	0	0	0	0	2	100	0	0
Distribution and Wholesale	0	0	0	0	2	100	0	0
Transport and Communications	0	0	0	0	0	0	1	100
Banking, Finance and Insurance	0	0	0	0	7	87.5	1	12.5
Consultancy Services	2	16.7	0	0	9	75.0	1	8.3
Legal, Accounting, Advertisement and Recruitment	1	50.0	0	0	1	50.0	0	0
Other Business Services	0	0	1	11.1	5	55.6	3	33.3
Other Services	0	0	0	0	5	83.3	1	16.7
Total	3	6.5	1	2.2	35	76.1	7	15.2

Base: all businesses which require additional floor space (46)

No. of Employees	Measures to Accommodate Expansion on Existing Site							
	Redevelopment		More intensive use of space		None of the above		Don't Know	
	No.	%	No.	%	No.	%	No.	%
1 to 4	3	8.8	0	0	26	76.5	5	14.7
5 to 10	0	0	1	16.7	4	66.7	1	16.7
11 to 49	0	0	0	0	3	75.0	1	25.0
50+	0	0	0	0	2	100	0	0
Total	3	6.5	1	2.2	35	76.1	7	15.2

Base: all businesses which require additional floor space (46)

Contact with Council

E.117 Respondents requiring additional floor space were asked whether they had contacted Hammersmith and Fulham Council with a proposal to expand or redevelop their premises (Table E.60).

E.118 On average just 2.2% of firms had been in contact with the Council. Only one firm in the legal, accounting, advertisement and recruitment sector made contact with the council. No firms in other sectors had been in contact with the Council. The reason given for contacting the council was for planning permission, and this was refused.

Table E.60 - Whether Council has been contacted with Proposal to Expand/Redevelop

Industry Sector	Response			
	Yes		No	
	No.	%	No.	%
Manufacturing	0	0	4	100
Construction	0	0	2	100
Distribution and Wholesale	0	0	2	100
Transport and Communications	0	0	1	100
Banking, Finance and Insurance	0	0	8	100
Consultancy Services	0	0	12	100
Legal, Accounting, Advertisement and Recruitment	1	11.1	2	100
Other Business Services	0	0	8	88.9
Other Services	0	0	6	100
Total	1	2.2	45	97.8
No. Employees				
1 to 4	0	0	34	100
5 to 10	0	0	6	100
11 to 49	0	0	4	100
50+	1	50.0	1	50.0
Total	1	2.2	45	97.8

Base: all businesses which require additional floor space (46)

RELOCATION

E.119 All respondents were asked to say whether they had considered relocating from their current premises (Table E.61).

E.120 24.8% of respondents stated that they had. Firms in the construction (44.4) and other business services sector (37.5%) were less likely to want to relocate. Larger firms were less likely to have considered relocation. 50% of all firms with 50 or more employees had considered relocating from their current premises compared to 22.2% of firms with 1 to 4 employees.

Table E.61 - Whether Relocation Has Been Considered

Industry Sector	Response			
	Yes		No	
	No.	%	No.	%
Manufacturing	5	25.0	15	75.0
Construction	4	44.4	5	55.6
Distribution and Wholesale	8	34.8	15	65.2
Transport and Communications	1	9.1	10	90.9
Banking, Finance and Insurance	8	20.5	31	79.5
Consultancy Services	14	35.0	26	65.0
Legal, Accounting, Advertisement and Recruitment	2	8.3	22	91.7
Other Business Services	15	37.5	25	62.5
Other Services	5	11.4	39	88.6
Total	62	24.8	188	75.2
No. Employees				
1 to 4	46	22.2	161	77.8
5 to 10	7	31.8	15	68.2
11 to 49	6	40.0	9	60.0
50+	3	50.0	3	50.0
Total	62	24.8	188	75.2

Base: all businesses (250)

E.121 Of the 62 firms who had considered relocating away from their current premises, 75.8% had considered moving away from the London Borough of Hammersmith and Fulham²⁶. 33.9% had considered elsewhere in Hammersmith and Fulham, whilst 24.2% had considered moving out of London altogether.

Table E.62 – Locations Where Respondents Have Considered Relocating

Location Options Where Respondents Have Considered Relocating							
Elsewhere in Hammersmith and Fulham		Surrounding Area		Elsewhere in London		Outside London	
No.	%	No.	%	No.	%	No.	%
21	33.9	18	29.0	14	22.6	15	24.2

Base: all businesses which have considered relocating (62)

E.122 Several respondents mentioned specific locations they have considered. These are:

- Chelsea (2 respondents)
- Battersea (1 respondent)
- Chiswick (1 respondent)
- Lincolnshire (1 respondent)
- East Yorkshire (1 respondent)
- Surrey (1 respondent)
- Munich (1 respondent)
- Scotland (1 respondent)
- Overseas (1 respondent)
- Don't know/undecided (1 respondent)

E.123 Respondents were then asked to specify the type of area in which they would like to relocate.

E.124 As shown in Table E.63, the greatest proportion of those which have considered relocating would prefer to be situated in a mixed use area (45.2%). 6.4% of firms suggested indifference in the type of area they would like to relocate to.

²⁶ Firms could choose more than one answer, this is why the total business opinions logged in the total is more than this figure.

Table E.63 – Locations Where Respondents Have Considered Relocating

Location Options Where Respondents Have Considered Relocating									
Dedicated industrial area		Residential area		Town Centre / Commercial District		Mixed Use Area		Non-specific type of area	
No.	%	No.	%	No.	%	No.	%	No.	%
6	9.7	10	16.1	16	25.8	28	45.2	4	6.4

Base: all businesses which have considered relocating (62)

E.125 Respondents whose firms had considered relocating were asked to state the likely floor space they would require if they were to relocate (Table E.64). Firms desire office space more than any other space type and the mean floor space required for that space type is 1,821 (Table E.65) square feet.

Table E.64 - Floor Space Types that Relocated Premises Would Require (Square Feet)

Floor space Types	Additional Floor space Required (Sq/ft)															
	None		1-500		501-1000		1001-2000		2001-3000		5001-10,000		10,001+		Don't Know	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Offices	4	6.5	16	25.8	4	6.5	8	12.9	1	1.6	2	3.2	1	1.6	26	41.9
Production	29	46.8	5	8.1	0	0	0	0	0	0	0	0	1	1.6	27	43.5
Studio/ Flexible Work Space	31	50	3	4.8	0	0	1	1.6	0	0	0	0	0	0	27	43.5
Warehouses	32	51.6	3	4.8	0	0	1	1.6	0	0	0	0	0	0	26	41.9
Showroom	35	56.5	1	1.6	0	0	0	0	0	0	0	0	0	0	26	41.9
Other Use	35	56.5	2	3.2	0	0	1	1.6	0	0	0	0	0	0	24	38.7
Total	166	-	30	-	4	-	10	-	1	-	2	-	2	-	156	-

Base: all businesses which have considered relocation (62).

Table E.65 – Mean Floor Spaces Required in each Space Type

Floor Space Type	Mean Floor space values required (Square Feet)
Offices	1821.04
Production	354.4
Studio/ Flexible Workspace	62.60
Warehouse	47.99
Other Uses	55.73

Reasons for Considering Relocation

E.126 Respondents were asked for reasons as to why they were considering relocation (Table E.66)²⁷. Most popular reasons were that their current site or premises is too small (46.8%) rents for their current premises are too high (25.8%), high business rates in the borough (24.2%), and traffic congestion (12.9%).

Table E.66 – Reasons for Considering Relocation

Reason	No.	%
Site/Premises too small	29	46.8
High rents	16	25.8
High business rates	15	24.2
Lack of car parking	4	6.5
Traffic congestion	8	12.9
To be closer to customers	2	3.2
Poor image	1	1.6
Poor public realm	1	1.6
Poor access	1	1.6
Poor public transport	3	4.8
Poor local facilities/amenities	1	1.6
Expiration/Terms of lease	1	1.6
Premises in poor condition	2	3.2
High security costs	4	6.5
Congestion charges	1	1.6
Poor skills base	1	1.6
Poor signage	1	1.6
Other	14	22.5

Base: all businesses which have considered relocating (62)

²⁷ Respondents could choose more than one option.

KEY FINDINGS

- E.127 Approximately a third of respondents (32%) are expecting to expand during the next ten years, 81.3% of which intend to expand through the employment of new staff. The majority of firms planning to take on full time staff (32%) expect to employ between one and four additional members of full time staff. Fewer firms expect to take on any part time staff; only 12% have firm plans to employ any such workers.
- E.128 57.5% of firms expect to require additional floor space, 37% which will require up to an additional 1,000 square feet. 6.5% firms believed that they would be able to accommodate their expansion plans at the current site or premises through redevelopment. Only 2.2% of firms with expansion plans had been in contact with the Council with regard to redevelopment plans.
- E.129 24.8% of businesses whom took part in the survey have considered relocating from their current premises. 33.9% of these firms wish to relocate within Hammersmith and Fulham or the surrounding area and a further 22.6% wish to relocate to another location in London. Firms considering relocation would prefer to relocate to a mixed use area (45.2%) or 9.7% of firms wished to relocate to a dedicated industrial area.
- E.130 Of those firms who wish to relocate from their existing premises, 19.6% require premises up to 500 sq.ft., 17.4% require premises between 500-1000 sq.ft, a further 4.3% require premises between 1000 and 2000 sq.ft. 4.5% of firms require premises greater than 10,000 sq.ft. 33.9% of firms with expansion plans believe that the premises that they require are available in the London Borough of Hammersmith and Fulham a further 22.6% answered elsewhere in London. The main reasons for considering relocation were that the existing premises were too small (46.8%), High rental levels (25.8%), High business rates (25.8%) and lack of car parking (24.2%).

PERCEPTION OF HAMMERSMITH AND FULHAM AS A BUSINESS LOCATION

E.131 The final section of this report identifies respondents' perceptions of Hammersmith and Fulham as a business location. Good and bad aspects will be identified and measures that the Borough Council could take to give assistance to businesses will be addressed.

PERCEPTIONS OF HAMMERSMITH AND FULHAM

E.132 Respondents were asked several questions regarding their perception of Hammersmith and Fulham as a business location.

E.133 When asked whether they thought Hammersmith and Fulham was a "good", "poor", "neither good nor poor" or "good in some ways, poor in other" location, over half of respondents (68.8%) stated that they viewed Hammersmith and Fulham as "good". Only 6.4% saw it as a poor location. Most likely to view Hammersmith and Fulham as a poor business location were firms in the distribution and wholesale sector, 17.4% of whom stated this opinion.

Table E.67 - View of Hammersmith and Fulham as Business Location

Industry Sector	Point of View							
	Good Location		Poor Location		Neither Good or Poor		Good in Some Ways, Poor in Other	
	No.	%	No.	%	No.	%	No.	%
Manufacturing	13	65.0	3	15.0	1	5.0	3	15.0
Construction	7	77.8	0	0	0	0	2	22.2
Distribution and Wholesale	12	52.2	4	17.4	1	4.3	6	26.1
Transport and Communications	9	81.8	0	0	1	9.1	1	9.1
Banking, Finance and Insurance	27	69.2	1	2.6	5	12.8	6	15.4
Consultancy Services	27	67.5	1	2.5	7	17.5	5	12.5
Legal, Accounting, Advertisement and Recruitment	20	83.3	2	8.3	1	4.2	1	4.2
Other Business Services	26	65.0	1	2.5	3	7.5	10	25.0
Other Services	31	70.5	4	9.1	1	2.3	8	18.2
Total	172	68.8	16	6.4	20	8.0	42	16.8

Base: all businesses (250)

Base: all businesses (250)

No. Employees	Point of View							
	Good Location		Poor Location		Neither Good or Poor		Good in Some Ways, Poor in Other	
	No.	%	No.	%	No.	%	No.	%
1 to 4	143	69.1	14	6.8	16	7.7	34	16.4
5 to 11	17	77.3	1	4.5	1	4.5	3	13.6
11 to 49	9	60.0	1	6.7	2	13.3	3	20.0
50+	3	50.0	0	0	1	16.7	2	33.3
Total	172	68.8	16	6.4	20	8.0	42	16.8

Positive Aspects of Hammersmith and Fulham

E.134 Respondents who consider Hammersmith and Fulham to be a good business location were asked to list the aspects they consider to be good²⁸ (Table E.68).

E.135 The Borough's good network of contacts was rated by 40.2% of positive respondents to be the number one good aspect of Hammersmith and Fulham (aside from the high percentage of people who were categorised in the "other" sector). Other popular "good aspects" also related to access and amenity aspects: "good public transport" was stated by 32.2% and "local labour base" was rated by 31.3% of respondents.

²⁸ Respondents suggested these reasons spontaneously – they were not provided with a list of possible responses

Table E.68 - Positive Aspects of Hammersmith and Fulham

Aspect	No.	%
Good transport/access arrangements	69	10.3
Local customer base	67	31.3
Good local facilities/amenities	34	15.9
Good public transport	69	32.2
Local cultural scene	8	3.7
Network of contacts	86	40.2
Good image for businesses	33	15.4
Local suppliers	13	6.1
Good public realm	14	6.5
Good quality land/premises	4	1.9
Low rents	15	7.0
Low crime rate	5	2.3
Little traffic congestion	5	2.3
Low business rates	10	4.7
Good local skills base	9	4.2
Good car parking	11	5.1
Low overall costs	9	4.2
Good labour supply	5	2.3
Good signage	2	9
Other	27	43.5

Base: all businesses which consider Hammersmith and Fulham to be a good business location/good in some ways (214)

Negative Aspects of Hammersmith and Fulham

E.136 Respondents who consider Hammersmith and Fulham to be a poor business location were asked to list the aspects they consider to be poor²⁹. The most stated reasons related to amenities (poor car parking, 46.6%) as well as the expensive nature of the Borough as a business location (high business rates and rents).

²⁹ Respondents suggested these reasons spontaneously – they were not provided with a list of possible responses

Table E.69 - Negative Aspects of Hammersmith and Fulham

Aspect	No.	%
Poor car parking	27	46.6
Poor public realm	6	10.3
High business rates	20	34.5
High rents	10	17.2
Poor Labour Supply	1	1.7
Poor image for businesses	7	12.1
Poor transport/access arrangements	8	13.8
Traffic congestion	21	36.2
Poor local facilities/amenities	4	6.9
High overall costs	2	3.4
Lack of support/services from Council	1	1.7
Poor public transport	4	6.9
Poor quality land/premises	2	3.4
Poor signage	1	1.7
Crime/lack of police/poor security	8	13.8
Little local networking	1	1.7
Congestion charges	1	1.7
Poor local skills base	2	3.4
Other	6	10.3

Base: all businesses which consider Hammersmith and Fulham to be poor business location/poor in some ways (58)

E.137 When asked whether these factors were enough to make firms leave Hammersmith and Fulham, nearly 30% responded that they were (Table E.70).

Table E.70 – Whether Factors Enough to Make Businesses Leave Hammersmith and Fulham?

Industry Sector	Response					
	Yes		No		Don't know	
	No.	%	No.	%	No.	%
Manufacturing	2	33.3	3	50.0	1	16.7
Construction	2	100	0	0	0	0
Distribution and Wholesale	5	50.0	2	20.0	3	30.0
Transport and Communications	0	0	1	100	0	0
Banking, Finance and Insurance	1	14.3	5	71.4	1	14.3
Consultancy Services	1	16.7	4	66.7	1	16.7
Legal, Accounting, Advertisement and Recruitment	0	0	1	33.3	2	66.7
Other Business Services	3	27.3	7	63.6	1	9.1
Other Services	3	25.0	6	50.0	3	25.0
Total	17	29.3	29	50.0	12	20.7
No. Employees						
1 to 4	14	29.2	25	52.1	9	18.8
5 to 11	2	50.0	1	25.0	1	25.0
11 to 49	1	25.0	1	25.0	2	50.0
50+	0	0	2	100	0	0
Total	17	29.3	29	50.0	12	20.7

Base: all businesses which consider Hammersmith and Fulham to be poor business location/poor in some ways (58)

ASSISTANCE AND SUPPORT

E.138 When all firms were asked if they were aware of the business support services provided by the council, it was clear that the majority did not know (79.6%). Perhaps there is scope to better promote such services.

Table E.71 – Are You Aware of Council’s Business Support Services

Industry Sector	Response			
	Yes		No	
	No.	%	No.	%
Manufacturing	3	15	17	85
Construction	0	0	9	100
Distribution and Wholesale	3	13	20	87
Transport and Communications	2	18.2	9	81.8
Banking, Finance and Insurance	7	17.9	32	82.1
Consultancy Services	8	20	32	80
Legal, Accounting, Advertisement and Recruitment	4	16.7	20	83.3
Other Business Services	8	20	32	80
Other Services	16	36.4	28	63.6
Total	51	20.4	199	79.6
No. Employees				
1 to 4	46	22.2	161	77.8
5 to 11	2	9.1	20	90.9
11 to 49	2	13.3	13	86.7
50+	1	16.7	5	83.3
Total	51	20.4	199	79.6

E.139 All respondents were asked whether the Borough of Hammersmith and Fulham could take any steps to help their business operate more effectively (Table 6.6).

E.140 A large proportion (47.6%) said that the Borough Council could take steps to assist local businesses (Table E.72).

Table E.72 – Whether Hammersmith and Fulham Borough Council Could Help Businesses Operate More Effectively

Industry Sector	Response					
	Yes		No		Don't know	
	No.	%	No.	%	No.	%
Manufacturing	9	45.0	10	50.0	1	5.0
Construction	6	66.7	3	33.3	0	0
Distribution and Wholesale	10	43.5	12	52.2	1	4.3
Transport and Communications	4	36.4	5	45.5	2	18.2
Banking, Finance and Insurance	20	51.3	13	33.3	6	15.4
Consultancy Services	19	47.5	18	45.0	3	7.5
Legal, Accounting, Advertisement and Recruitment	6	25.0	13	54.2	5	20.8
Other Business Services	15	37.5	20	50.0	5	12.5
Other Services	18	40.9	25	56.8	1	2.3
Total	107	42.8	119	47.6	24	9.6
No. Employees						
1 to 4	88	42.5	98	47.3	21	10.1
5 to 11	11	50.0	9	40.9	2	9.1
11 to 49	5	33.3	9	60.0	1	6.7
50+	3	50.0	3	50.0	0	0
Total	107	42.8	119	47.6	24	9.6

Base: all businesses (250)

E.141 Respondents requiring action from the Borough were asked to suggest the ways in which the Council could help³⁰ (Table E.73).

E.142 “Improve car parking provision” was stated by over a third (36.4%) of respondents. Steps to make the Borough a cheaper place to run a business was also stated: “reduce rents” and “reduce taxes” was stated by 34.6% and 24.3% respectively.

³⁰ Respondents suggested these reasons spontaneously – they were not provided with a list of possible responses

Table E.73 – How Hammersmith and Fulham Could Provide Assistance

Assistance	No.	%
Improve car parking provision	39	36.4
Improve public realm/infrastructure	6	5.6
Reduce rents	26	24.3
Reduce taxes	37	34.6
Improve access	7	6.5
Reduce crime	11	10.3
Reduce congestion	18	16.8
Improve image	8	7.5
Improve public transport	6	5.6
Provide better business support	4	3.7
Improve waste/rubbish disposal, cleaner streets	1	9
Offer/increase grants and subsidies to businesses	4	3.7
Improve planning/relax rules	2	1.9
Increase availability of Labour	1	0.9
Improve postal service (more post boxes/ post offices)	2	1.9
Increase availability of land	7	6.5
Help market local business	4	3.7
Encourage opening of quality shops	1	0.9
Extend discount on new business to 5 years	1	0.9
Respond to e-mails	1	0.9
Lighten the strict parking ticket procedure (traffic wardens)	1	0.9
Improve recycling facilities	2	1.9
Introduce CCTV	1	9
Have less road works	1	0.9
Better relationship between council and people generally	1	0.9

Base: all businesses which would like the Borough of Hammersmith and Fulham to help their business operate more effectively (430)

E.143 Firms were asked if they were aware of the West London Business programme, the majority claimed they did not know about it (87.6). It was more common for larger firms to have some knowledge about the business programme.

Table E.74 – Are you aware of the West London Business programme to assist businesses to find premises locally?

Industry Sector	Response			
	Yes		No	
	No.	%	No.	%
Manufacturing	3	15	17	85
Construction	2	22.2	7	77.8
Distribution and Wholesale	3	13	20	87
Transport and Communications	0	0	11	100
Banking, Finance and Insurance	4	10.3	35	89.7
Consultancy Services	4	10	36	90
Legal, Accounting, Advertisement and Recruitment	2	8.3	22	91.7
Other Business Services	2	5	38	95
Other Services	11	25	33	75
Total	31	12.4	219	87.6
No. Employees				
1 to 4	26	12.6	181	87.4
5 to 10	3	13.6	19	86.4
11 to 49	1	6.7	14	93.3
50+	1	16.7	5	83.3
Total	31	12.4	219	87.6

Base: 11 Businesses (250)

E.144 Of those respondents who asserted they had heard of the West London Business services programme, only 12.9% suggested they used the scheme to find business premises.

Table E.75 – Have you ever used the West London Business services to find premises?

Response	No.	Percentage of Total
Yes	4	12.9
No	27	87.1
Total	31	100

Base: Of those who were aware of West London Business Programme

KEY FINDINGS

E.145 Generally respondents regard Hammersmith and Fulham as a good business location. Over half of the respondents to the business survey (68.8%) held this view. Good network of contacts (40.2% of respondents), local customer base (31.3%) and good public transport (32.2%) were the main positive aspects stated by respondents.

E.146 Car parking issues were the main reason given as to why Hammersmith and Fulham is a poor business location by just under half of respondents. High rents (17.2%) and high business rates (34.5%) were also stated by many respondents as being not conducive to conducting business in the Borough. 29.5% of respondents stated that stated negative aspects would be enough reason to cease business in the Borough.

E.147 The majority of respondents believe that Hammersmith and Fulham Borough Council could in some way help businesses operate more effectively. Amenity improvements were seen by many respondents as being key methods in which the Council could assist business. This includes initiatives to improve car parking and reduce rates and rents.

E.148 Overall respondents would like to see better Council networking and input into local business, improvements to local facilities and amenities particularly resolving parking issues.

APPENDIX F

Site Survey Proforma

F. SITE SURVEY PROFORMA

APPENDIX G

Detailed Site Analysis

G. DETAILED SITE ANALYSIS

G.1 This Appendix sets out the detailed figures and tables which support the analysis presented in Section 4 of the main report.

List of Figures (Appendix G)

G1- North (Boundaries and Building Footprints)

G2- Central (Boundaries and Building Footprints)

G1- South (Boundaries and Building Footprints)

List of tables (Appendix G)

G-1 Type of Location

G-2a Sites with Vacant Land

G-2b Sites with Vacancy – Development Issues

G-2c Vacant Land

G-3 Employment Premises

G-4 Employment Floorspace Summary

G-5 Employment Floorspace by Use

G-6 Range of Premises

G-7 Age of Premises

G-8 Condition of Premises

G-9 Site Plot Ratio

G-10 Road Access

G-11 Parking Provision

G-11a Public Transport Access

G-12a Environmental Constraints

G-12b Environmental Quality

G-13 Existing Employment Role

G-14 Scope for Change

G-15 Change Constraints

G-16 Changes to Policy Designations