


NATS Business Questionnaire Results

Analysis

January 2010

Norfolk County Council

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Mott MacDonald

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Content

Introduction and summary

This report sets out the main findings of a questionnaire which was run at the beginning of November 2009 to understand the impact of the proposed Norwich Area Transportation Strategy (NATS) on businesses in Norfolk. It presents the responses of the 105 businesses that answered the questionnaire, summarising the main trends. These results will be drawn upon and combined with other evidence within the overall socio-economic impact (SEIA) report.

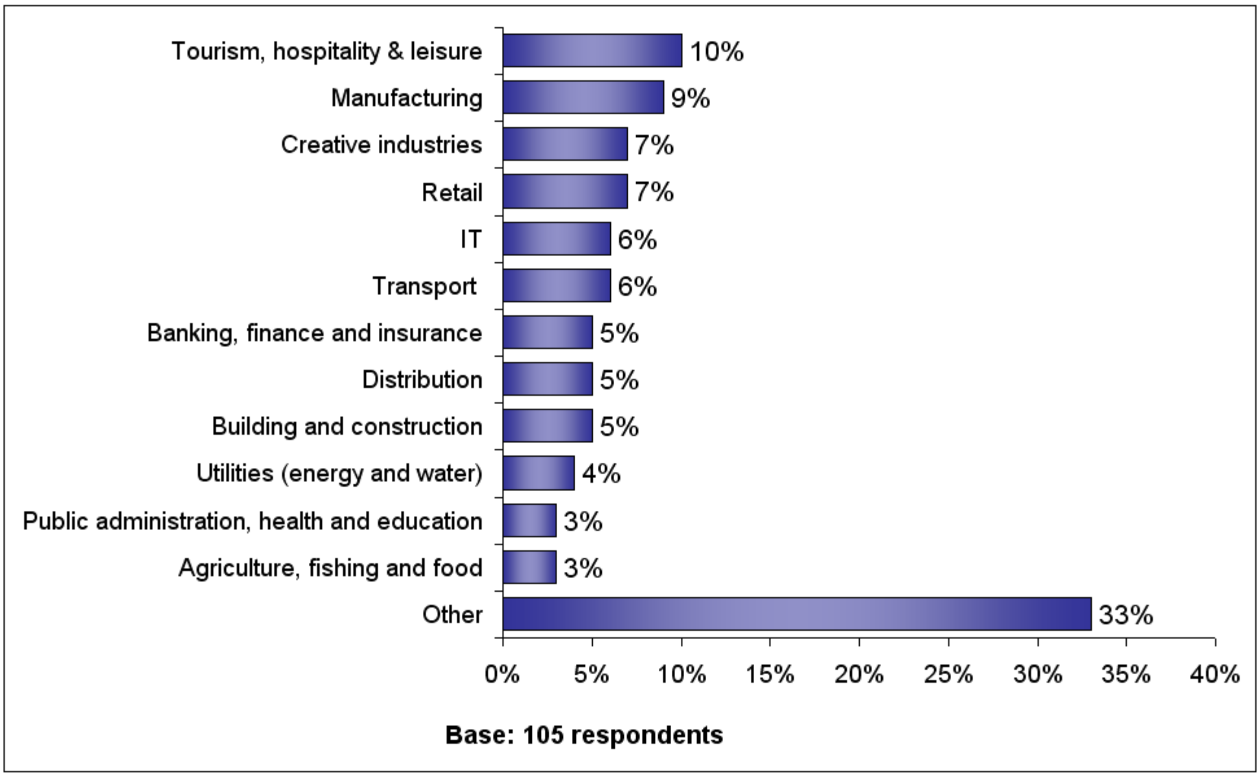
Some of the key findings in terms of NATS' likely impacts on businesses is provided below:

- Nearly half of all respondents to the questionnaire were businesses located in the district of Norwich, particularly clustered within the inner ring-road.
- Presently, car is by far the most used mode of transport for employees, customers, suppliers and staff. Cars are also considered very important to access meetings and events in Norwich.
- Transport is considered a weakness in terms of access to business locations. Nearly a third of businesses consider poor road accessibility to be their key constraint, whilst a further 24% consider poor public transport links as a hindrance.
- Two thirds of businesses consider that the local transport infrastructure acts as a barrier to recruiting staff and that NATS will be able to improve this by improving access around the area.
- 79% and 65% of business consider that NATS will have a positive impact upon their ability to access customers and suppliers, respectively.
- The Northern Distributor Road (NDR) was by far the most popular of the proposed NATS interventions with 79% agreeing that it will realise positive impacts.
- Other interventions popular with businesses include rail service and bus infrastructure improvements and the use of new traffic technology.
- Many interventions were not regarded as likely to have much impact either positively or negatively for businesses, including the suggested tram-train, freight consolidation initiatives and walking measures.
- Overall 82% of businesses agreed that NATS would result in benefits for the economy.

1. Profile of businesses

In order to create a profile of businesses responding to the questionnaire, various questions were asked about their characteristics. Figure 1.1 shows that a third of all businesses defined themselves as being outside of the list of options that were provided. From the remaining two-thirds of businesses ***the greatest representation was from the 'tourism, hospitality and leisure' sector (10%), closely followed by manufacturing (9%).*** 105 businesses completed the questionnaire.

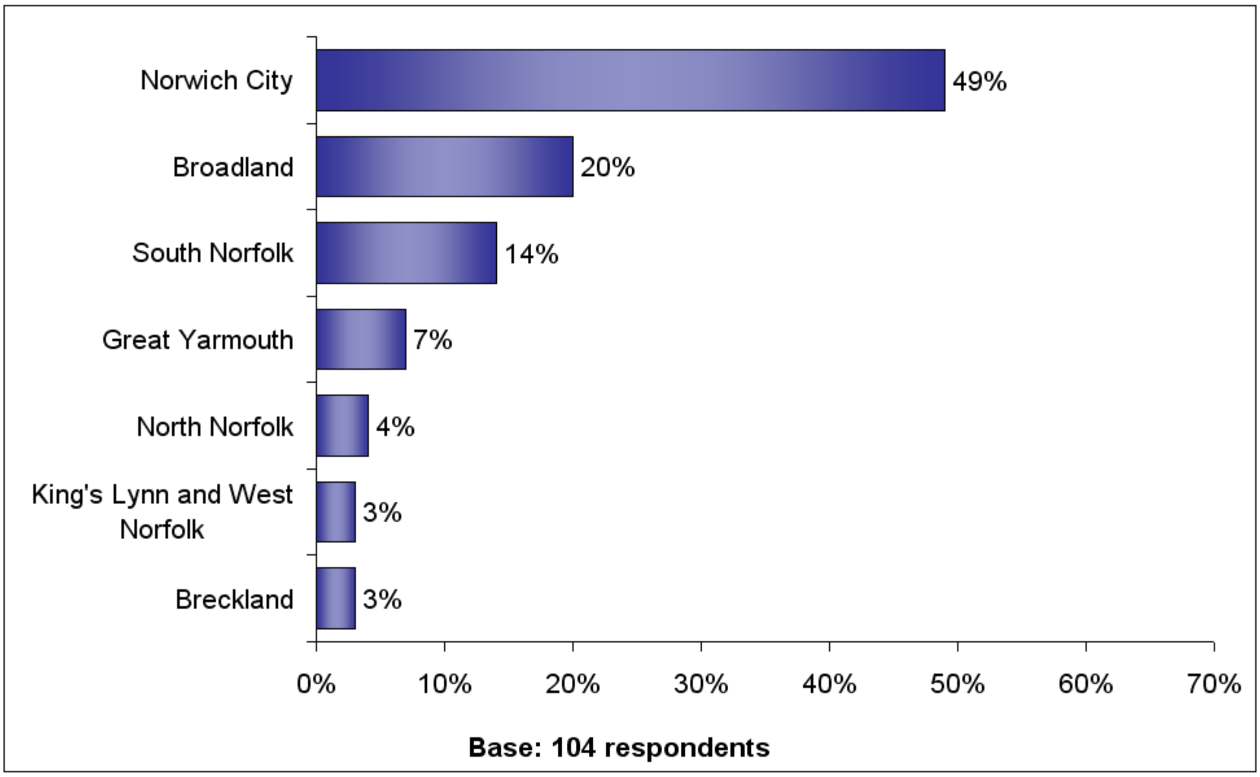
Figure 1.1: Sector of businesses (Q3)



Is it an issue that 33% were outside the list of options provided? If respondents identified an alternative (as free text) could these be listed and graphically represented on the above?

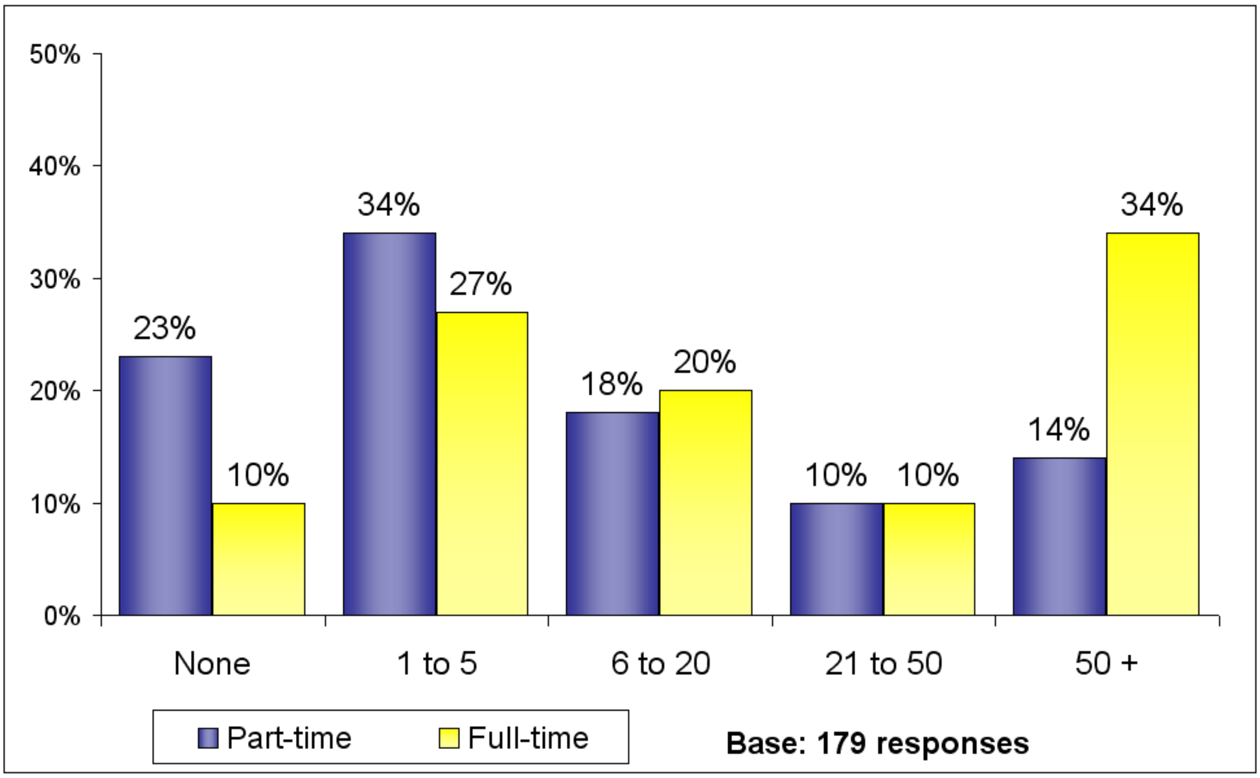
Nearly half of all respondents (49%) had their main place of employment in the district of Norwich (shown in figure 1.2). This was followed by Broadland, where 20% of business had their main site.

Figure 1.2: Main location of businesses: office where most staff are employed (Q5)



The figure below (1.3) shows that there was ***considerable diversity in the size of businesses who responded*** to the questionnaire, with ***greatest number of businesses employing between one and five people in total***. There is also quite a difference in the number of people employed part-time and full-time by Norfolk businesses. 23% of businesses do no employ people on a part-time basis, however this is only 10% for full-time positions. In terms of full time staff, most businesses employ either between 1 and 5 or over 50; in terms of part time staff most businesses employ between 1 and 20 employees.

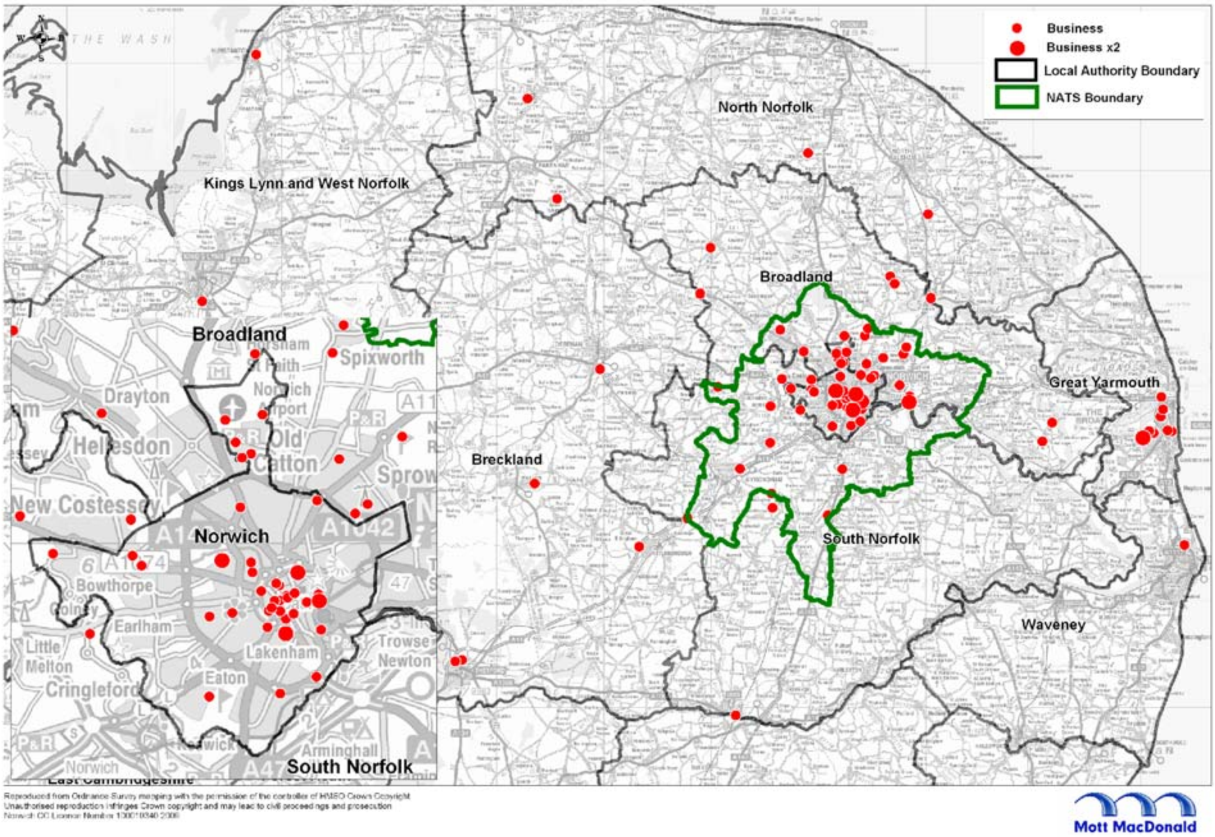
Figure 1.3: Number of employees of businesses: part-time and full-time (Q14)



2. Business locations

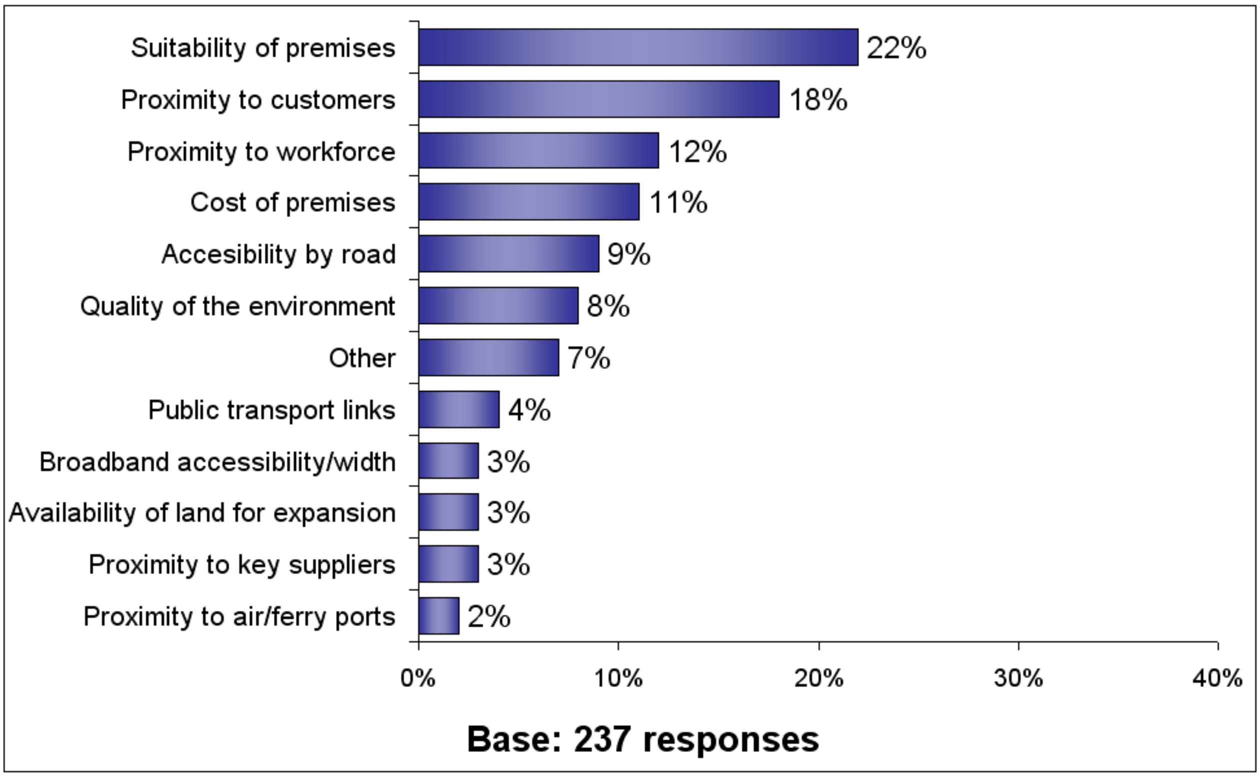
The map below (figure 2.1) shows that, of those businesses that responded, there was a concentration in the Norwich City area. Although companies may have sites elsewhere, there is a high concentration of head offices in the city centre. Other areas where responses were concentrated, although to a lesser extent, included Great Yarmouth and just north of Norwich. The insert of figure 2.1 shows that many business locations are within the inner ring-road of Norwich, particularly in the central business district.

Figure 2.1: Location of businesses surveyed (Q2)



Businesses were asked to state the three main reasons for choosing the location of their main office. Of the 237 responses given ***22% stated that the suitability of the premises were very important when making a choice (see figure 2.2). This was follow by the business' proximity to customers (18%).*** The proximity to the workforce and cost of premises were also considered important. In terms of transport considerations, the main issue for businesses was accessibility of their premises to road links; 9% of respondents identified this as a factor of importance when choosing their site.

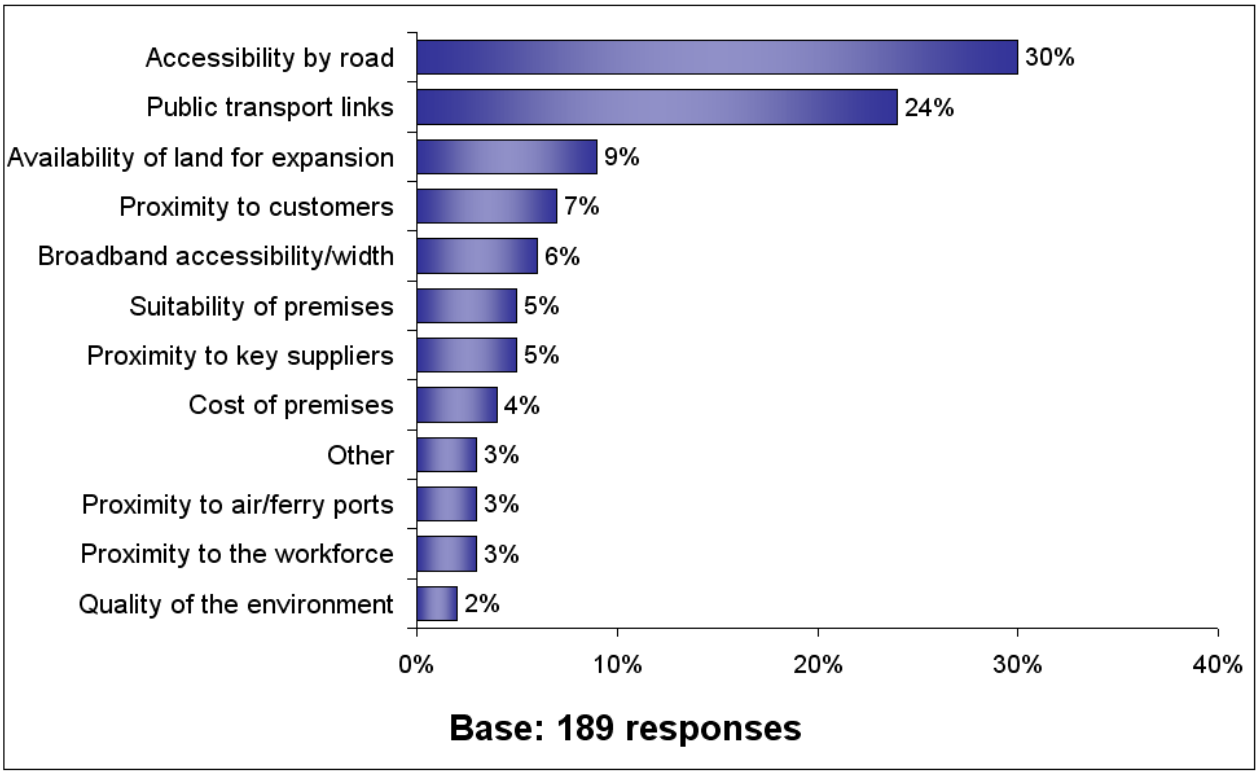
Figure 2.2: Main reasons for businesses choice of location (Q6)



When asked the main weaknesses of their current location, accessibility by road was considered the most significant issue (30% of responses). Public transport links were also considered poor (24%). These were by far the most important priorities for businesses (see Figure 2.3 below).

Other comments made by respondents regarding the weakness of the current locations included the perceived difficulty of accessing Norfolk due to travel constraints, limited bus and rail links and heavy traffic congestion, on both urban and rural roads, causing delays. As well as poor links within Norfolk it was also stated that 'roads in and out of Norwich are poor' and there was some concern about 'parking costs'.

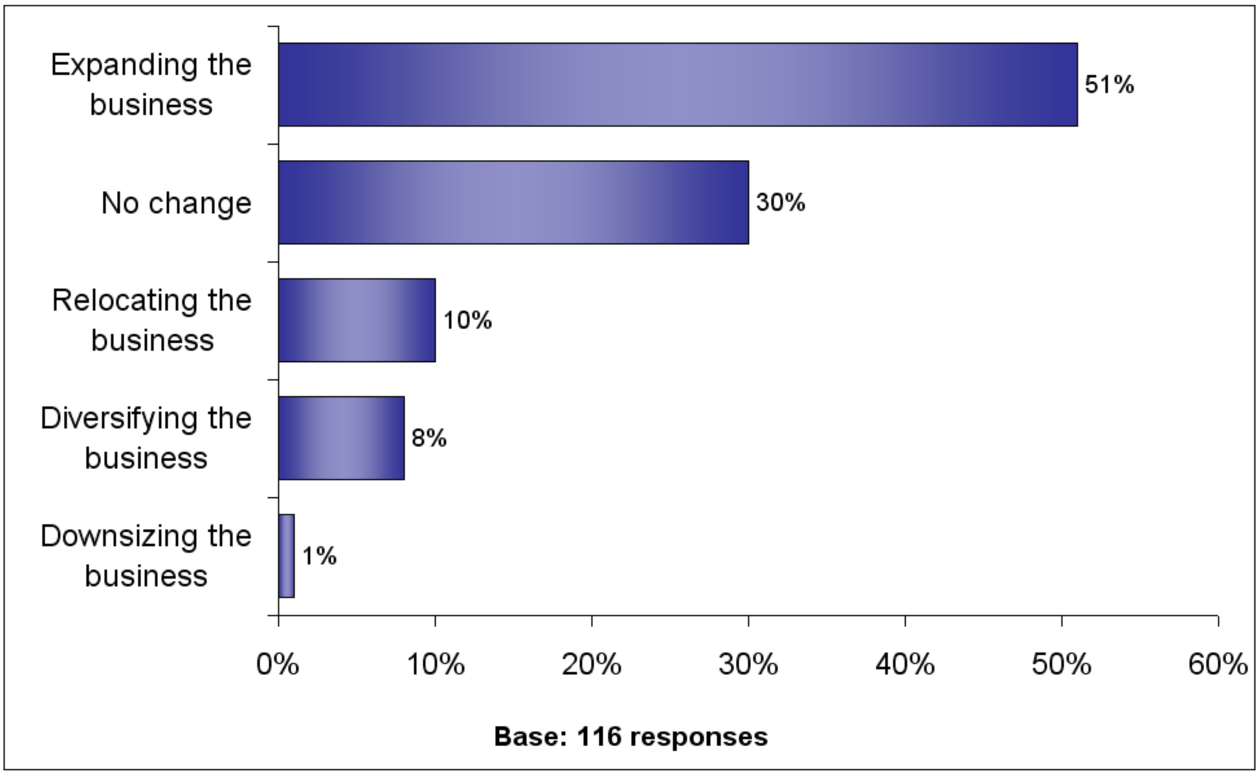
Figure 2.3: Main weaknesses of current sites for businesses (Q7)



3. Future business plans

Businesses were asked to comment on a series of statements about the size, location and diversification of their businesses and whether they considered transport infrastructure to be an influence on these decisions. Of those who responded ***51% said they are considering expanding their business*** (see figure 3.1). Smaller proportions stated that they were considering relocating their business (10%) and/or diversifying (8%). Only one percent of responses stated that they were considering down sizing the business. 30% stated that they are considering no change to their business.

Figure 3.1: Level of change being considered by businesses (Q9)

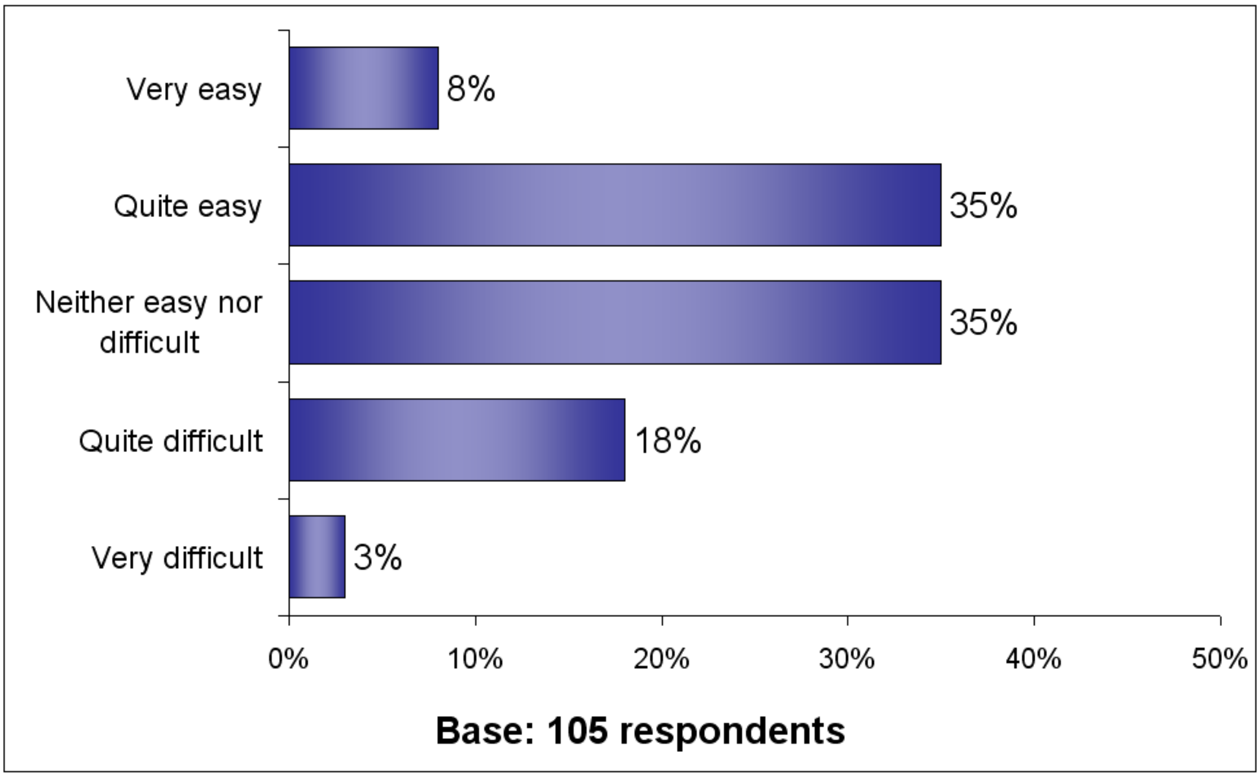


Of the 12 respondents who were considering relocating, a third considered transport a major influence. Another 41% also considered it a factor, however only to a minor extent. 25% said it was not an influence at all. Of the one response from the businesses planning to downsize they considered transport only as a minor influence in their decision.

4. Staff recruitment and current staff characteristics

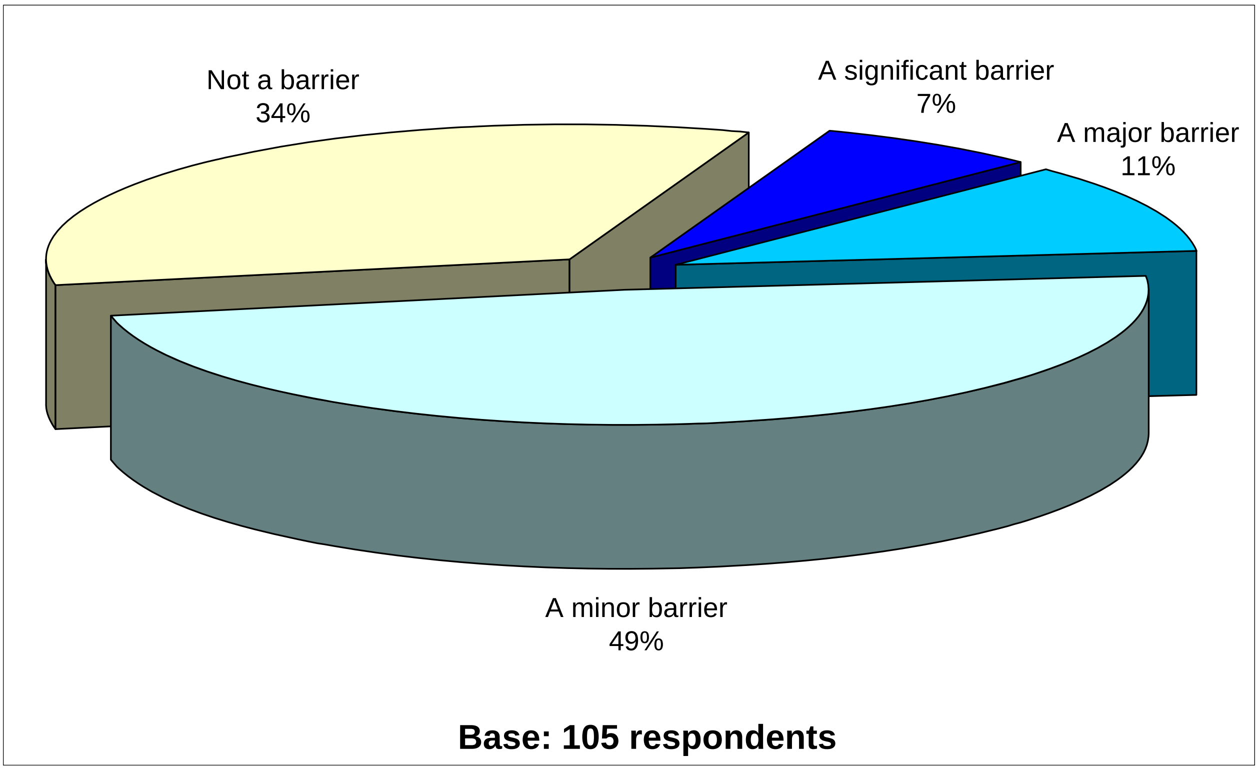
When asked how easy they found it to recruit staff, ***43% of businesses said they recruited with ease*** (8% very easy, 35% quite easy) and 35% believed it was 'neither easy nor difficult'. ***21% stated that it was difficult to recruit*** (18% 'quite difficult' and 3% 'very difficult') (see figure 4.1).

Figure 4.1: The ease of which staff can be recruited (Q15)



Businesses were also asked whether they thought that transport infrastructure was a barrier to recruitment. Of those who responded over a third (34%) believed it was not a barrier. However, ***67% believed that transport infrastructure is a barrier to recruiting staff*** (49% considered in a minor barrier; 7% believed it is a significant barrier and another 11% a major barrier) (figure 4.2).

Figure 4.2: The extent to which transport infrastructure is a barrier to recruiting staff in the current location (Q16)



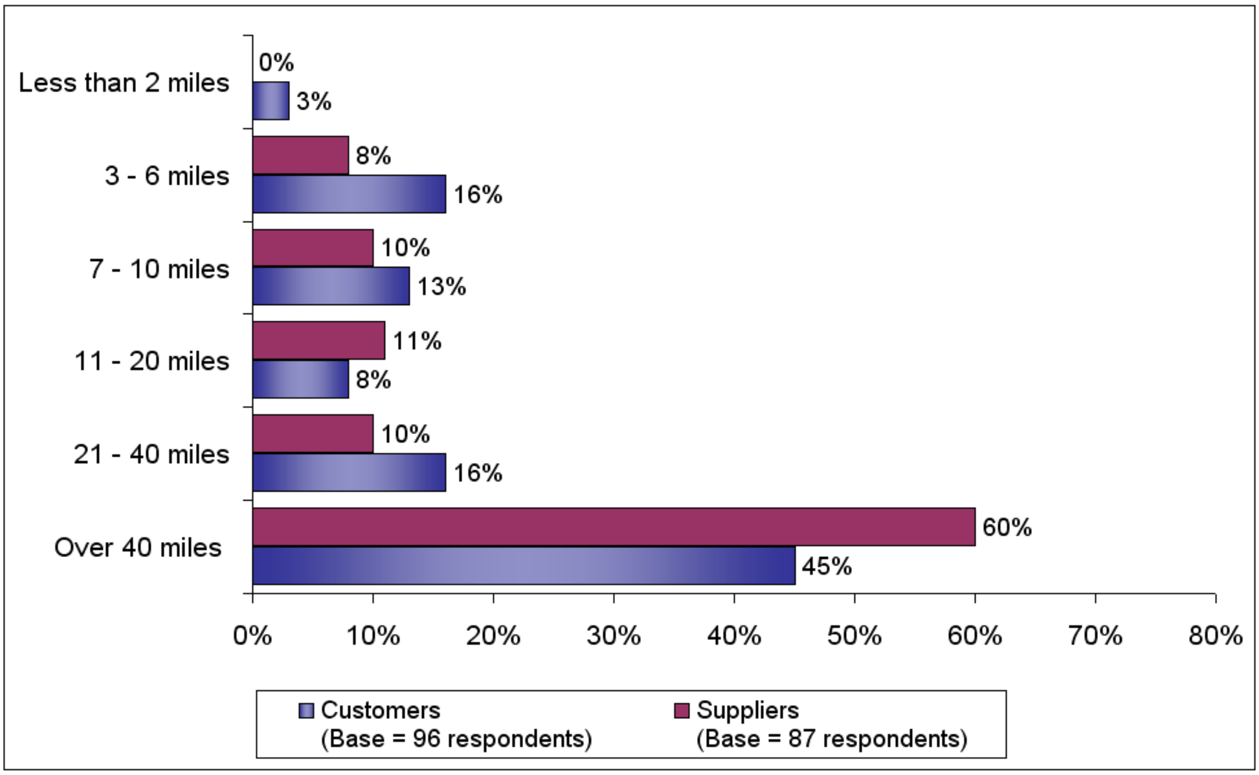
Businesses were asked to state the modes of transport their staff used to get to work. ***The majority of businesses identified that the car was the most popular transport means*** (73% of businesses have over 60% of their staff travelling by car). 100% of businesses stated that between 0% and 20% of their staff used the train to get to work. This was the same figure for both taxis and motorcycles. All businesses believed that less than 40% of their staff used the bus. In summary there were no businesses that stated public transport modes as being used by over 50% of their employees.

5. Profile of customers

When analysing the distance from businesses to principal customers there appeared to be a high number who are over 40 miles (45%). The remaining share of customers are reasonably spread across groups between 3 and 40 miles (as shown in figure 5.1), with only 3% of customers less than 2 miles away.

The distance from businesses to their suppliers is relatively different. For 60% of businesses their suppliers are over 40 miles away. No businesses have principal suppliers less than two miles away.

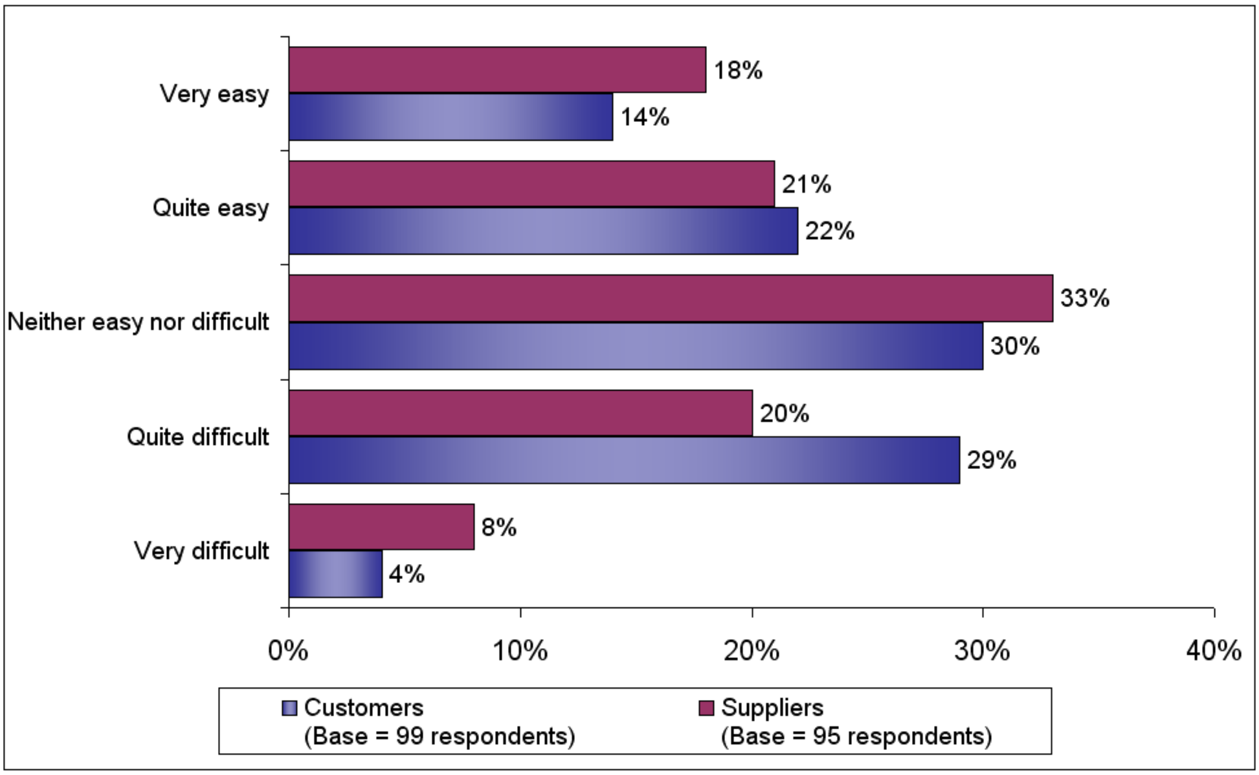
Figure 5.1: Location of principal customers and suppliers (Q19)



Businesses were asked how easily their customer and suppliers could find their business location (figure 5.2). ***36% of businesses believe that their customers find their premises easily*** (14% 'very easy' and another 22% 'quite easy'.) Nearly a third of businesses (30%) were of the opinion that their customers find it 'neither easy nor difficult' to find them. However, ***there is a significant proportion of businesses (33%) who believe their customers find it 'quite difficult' or 'very difficult' to find their site*** (29% and 4% respectively).

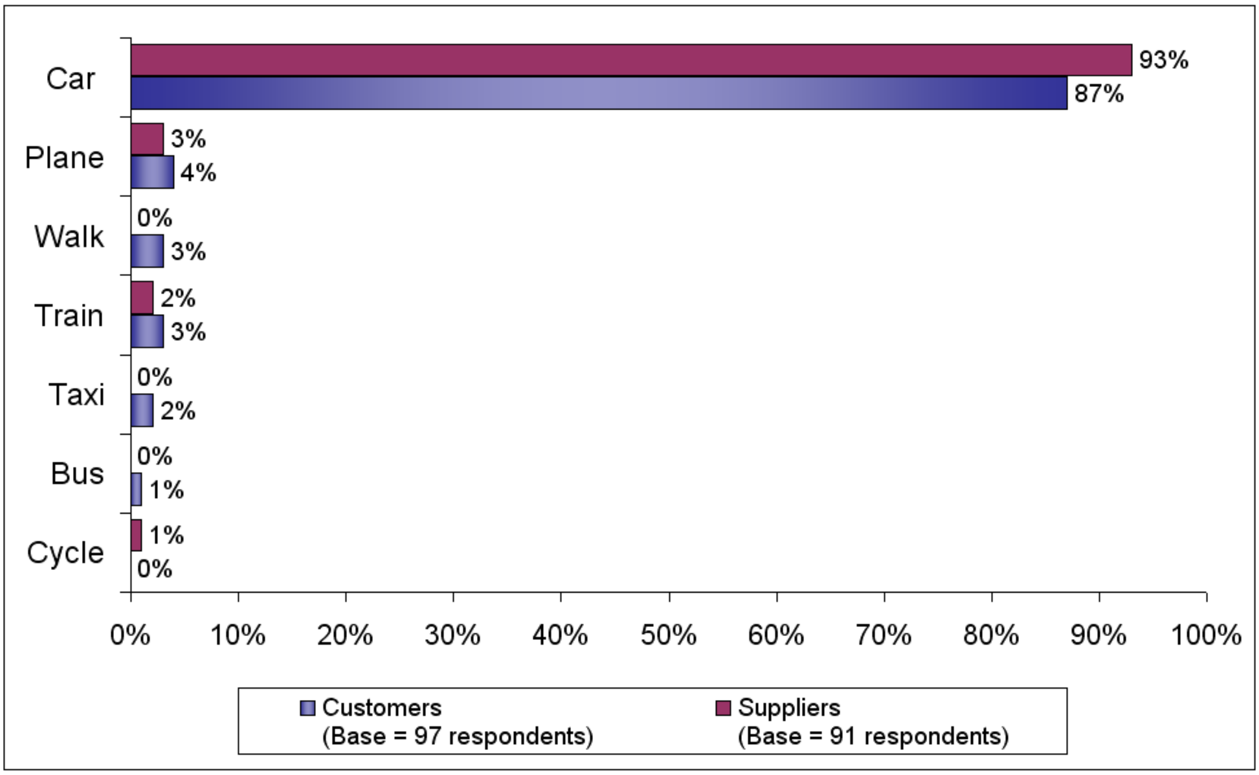
For suppliers the figures are similar to those for customers. ***39% of businesses believe their suppliers find their location easily*** (18% very easy; 21% quite easy). A third of businesses believe that finding their site is 'neither easy nor difficult' for suppliers, whilst ***28% of businesses believe their suppliers do have difficulty with site access*** (20% 'quite difficult'; 8% 'very difficult').

Figure 5.2: The ease for principal customers and suppliers to find the business location (Q20)



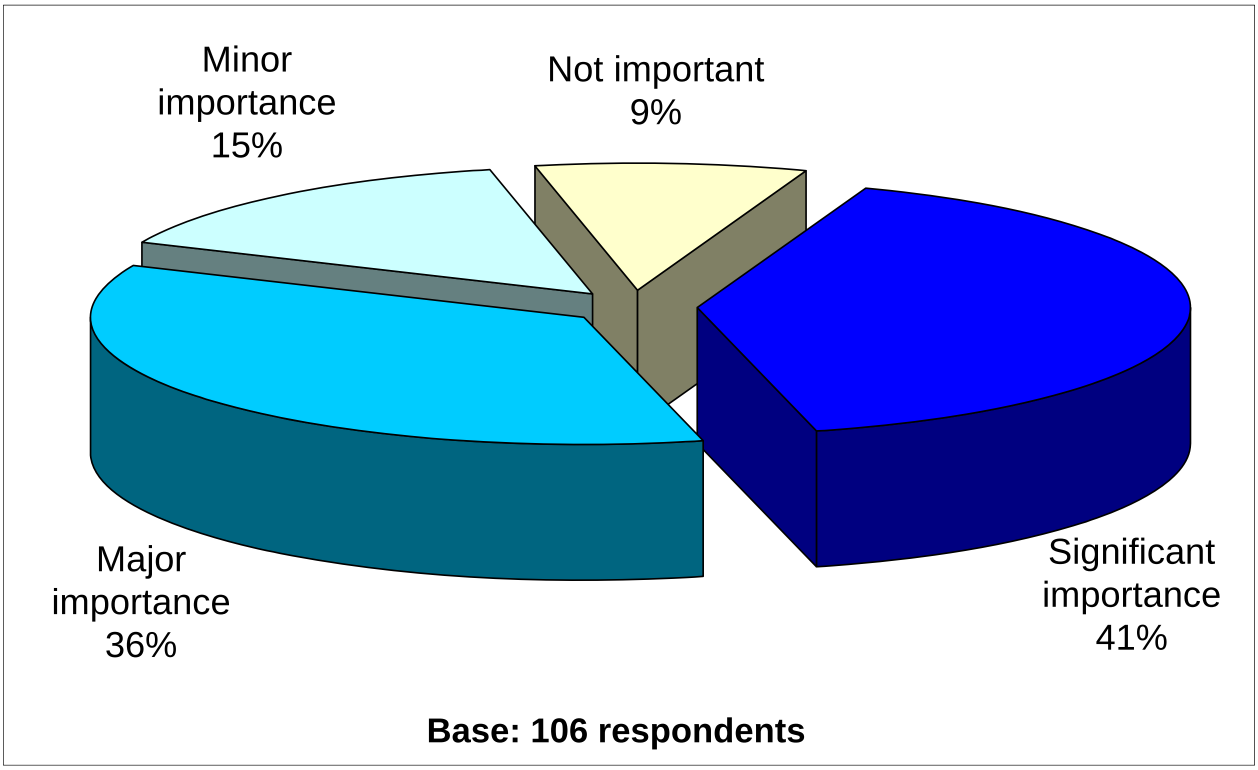
Businesses were asked how their customers and suppliers accessed their main business site. Car was overwhelmingly the most popular mode of choice in both categories (87% for customers, 93% for suppliers). Of the other modes of transport, aeroplane was the next highly used. This accounted for 4% of customers and 3% of suppliers. As shown the figure 5.3 below other modes are only used at a low level, including train, bus and taxi.

Figure 5.3: Main mode of transport use to access the business site (Q21)



The ***level of importance of car use to reach Norwich-based meetings*** was ascertained through asking businesses about their experiences (figure 5.4). ***77% of respondents believe that the car is of 'significant' or 'major importance'***. Only 9% believed it was of 'no importance'; 'minor importance' also accounted for 15%. Of those businesses based in Norwich, 13.7% stated that car use was 'not important' when attending meetings. Norwich was the district which had the lowest proportion of businesses who stated that car use was 'of major importance' (29.4%). This is considerably less than elsewhere in the county; for example, in Great Yarmouth and South Norfolk 85.7% and 60% of businesses, respectively, considered that cars are 'of major importance' to access Norwich-based meetings.

Figure 5.4: Importance of the car for Norwich-based meetings (Q24)



6. Views of proposals

Businesses were given a series of statements regarding the extent to which they perceived that NATS could help with their business performance.

Figure 6.1 below shows that ***64% of businesses believe that NATS would have an impact on recruitment***, whilst *79% agree that it will have an impact* ***on access to customers*** (figure 6.2).

Figure 6.1: Effect of NATS on business staff recruitment

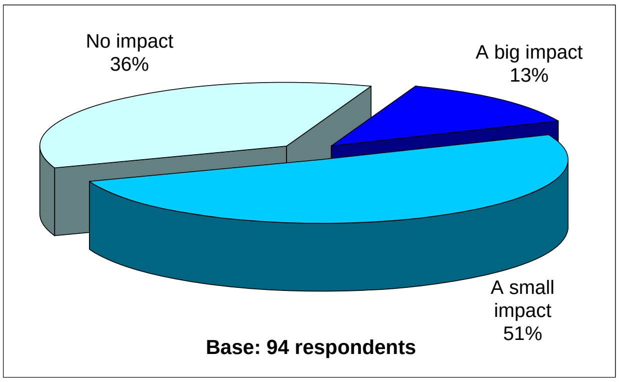


Figure 6.2: Effect of NATS on business access to customers

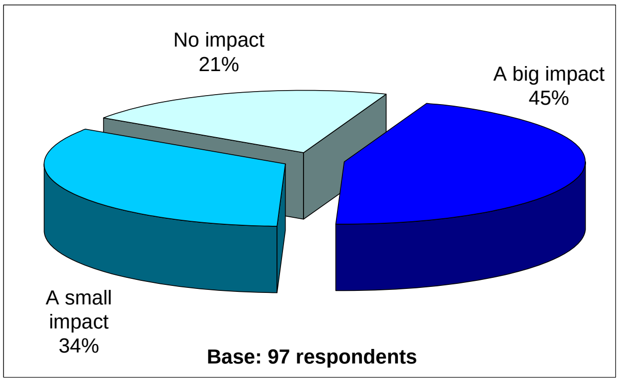


Figure 6.3 shows that, when asked how NATS would help access to suppliers, **28% perceived that there would be a big impact**. Another **37% believed there would be a small impact**. The **remaining 35% believed there would be no impact**. Figure 6.4 shows that ***46% of business believe that NATS will have no impact on their potential for expansion. The remaining 55% either perceive a small or big impact on expansion potential*** (27% and 28% respectively).

Figure 6.3: Effect of NATS on business access to suppliers

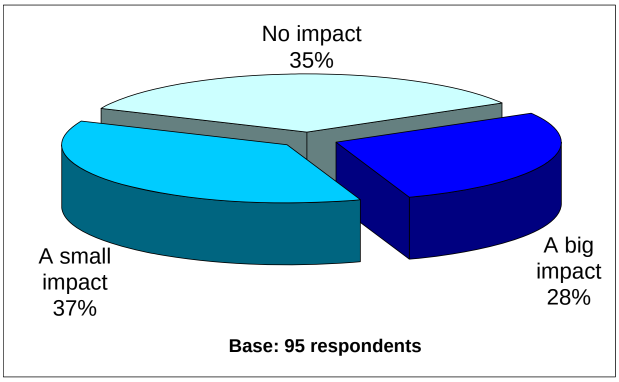
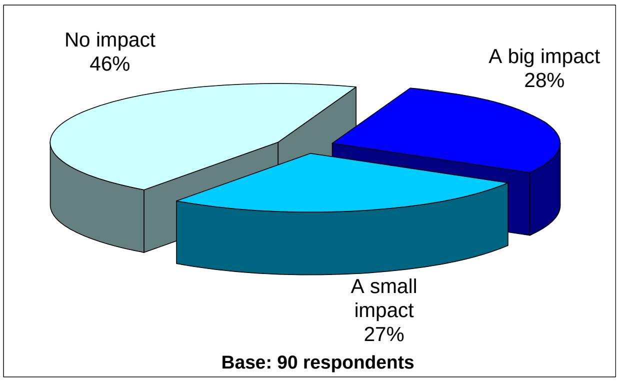


Figure 6.4: Effect of NATS on potential for business expansion



Businesses were asked about the perceived impacts of NATS on their ***performance compared to their competitors.*** **56% of respondents** believed there would be an **impact on their performance** (22% a 'big impact'; 34% a small impact), compared to ***44% of the respondents who believed no impact would be felt*** (see figure 6.5).

In relation to improved ***links to the airport through NATS*** (figure 6.6), **49% of respondents felt there would be an impact** (22% a 'big impact'; 34% a small impact) ***whilst 41% believed that there would be 'no impact'.***

Figure 6.5: Effect of NATS on business performance compared to competitors

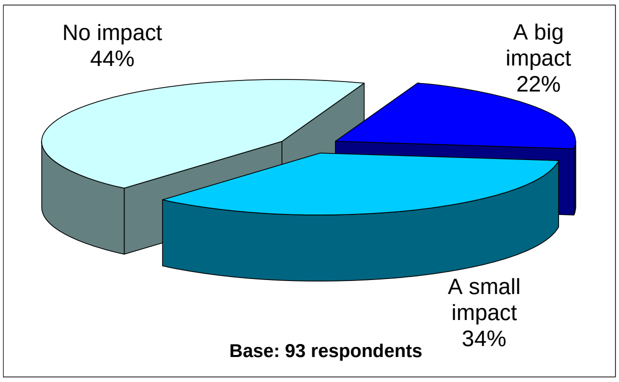
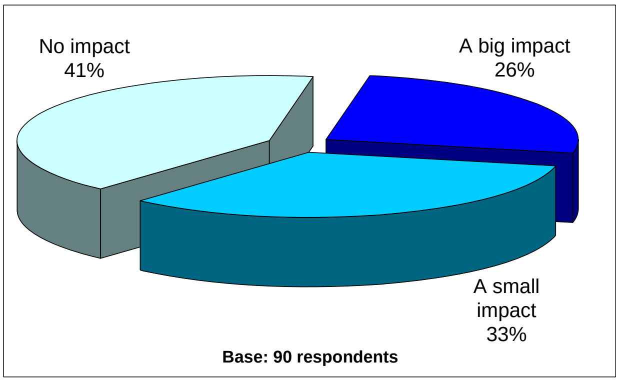


Figure 6.6: Effect of NATS on improving business links to the airport



7. Interventions

Finally businesses were asked to what extent the various interventions proposed in NATS would have an impact on them. ***The intervention with the highest perceived positive impact is the 'Northern Distributor Road' where 79% believed the scheme would have a positive impact***, to either a large or small extent (81 respondents). Of those 81 respondents, 41 were within the Norwich City district, with another 17 from Broadland and 12 from South Norfolk.

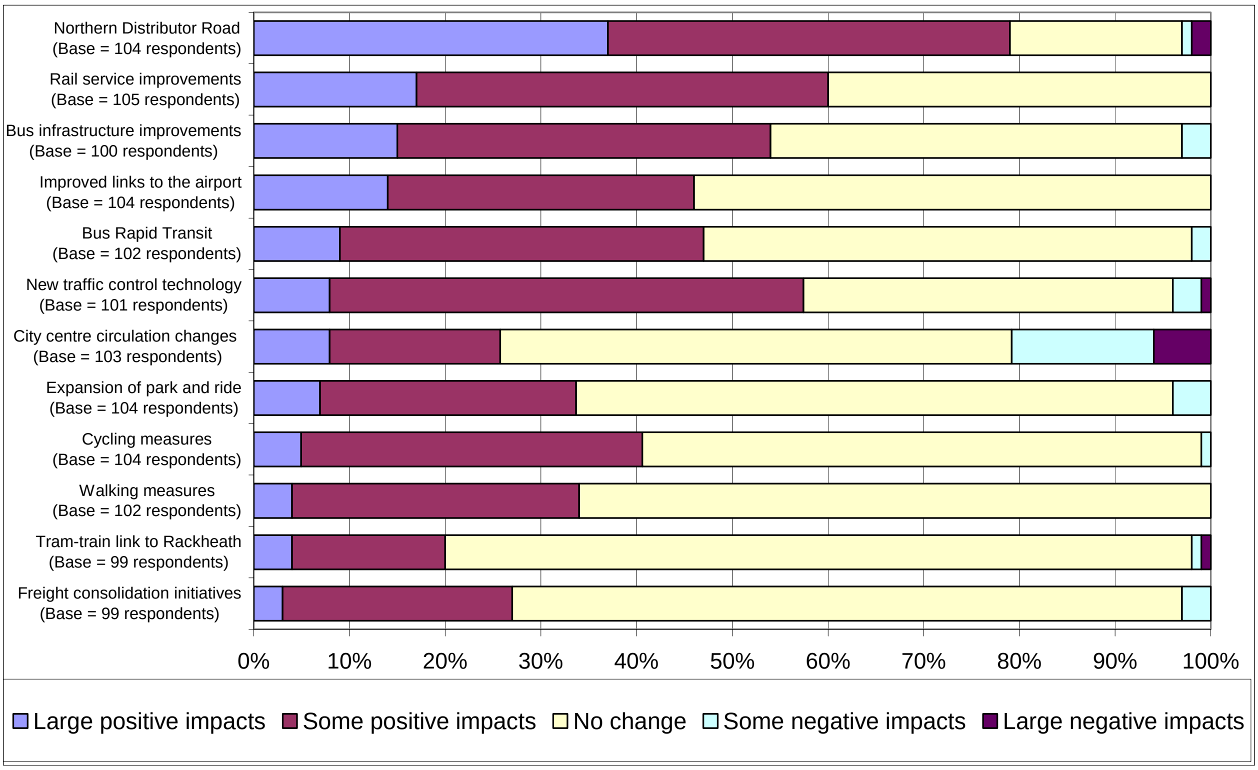
.***Only 3% believed there would be negative impacts on their business.*** These businesses that gave this response were situated in each of the districts of North Norfolk, Norwich City and Broadland.

Other interventions which were regarded by over 50% of businesses as having positive impacts included rail service improvements (60%), bus infrastructure improvements (54%) and new traffic technology (58%).

There were a number of proposals for which most businesses considered that there would be 'no change' to their performance. ***For eight of the suggested 12 interventions over half of responses regarded that they would result in 'no change'***. The schemes perceived to make no difference were:

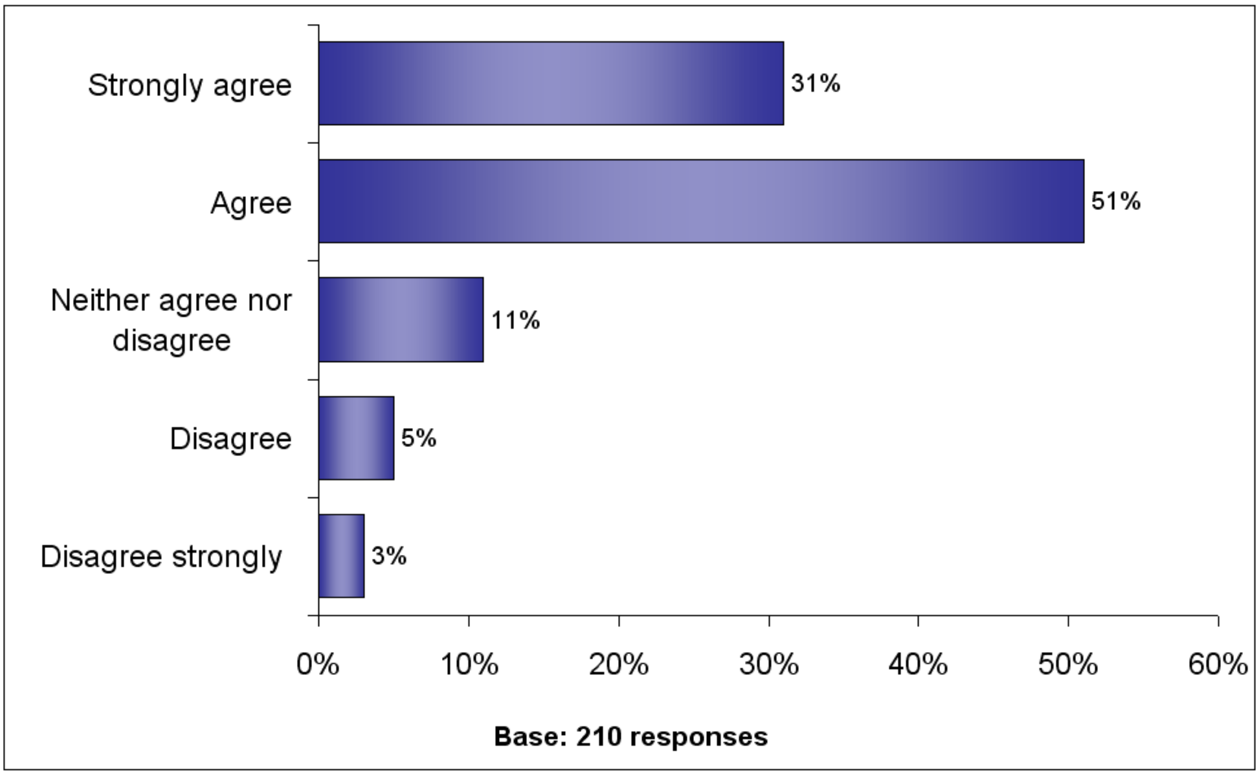
- Tram-train link to Rackheath (78%)
- Freight consolidation initiatives (70%)
- Walking measures (66%)

Figure 7.1: The extent that NATS transport interventions would help business performance (Q23)



Businesses were asked to what extent they believe NATS will improve the local economy (see figure 7.2). A total of ***82% agreed that NATS would result in benefits for the economy***. 31% ‘strongly agreed’ with the statement, as well as over half (51%) agreeing. 11% neither agreed nor disagreed with the statement, with only a small percentages disagreeing. 5% of businesses disagreed’ with the statement; these were from Norwich City (two respondents), Broadland (two respondents) and North Norfolk (one respondent). The 3% of businesses who ‘disagreed strongly’ were all within Norwich City (three respondents)

Figure 7.2: Level of agreement as to whether NATS will improve the local economy (Q25)



8. Further comments

As a conclusion to the questionnaire respondents were invited to make further comments regarding issues raised in the questionnaire. A summary of these comments is provided below .

8.1 City centre issues

- Pedestrianisation could improve access to businesses in the centre.
- There is a ***desire for areas to be pedestrianised as soon as possible*** (for example, Westgate) without having to wait for the construction of the NDR.
- ***Ensure that visitors to Norwich and the city centre are not hindered by proposed changes***, for example pedestrianisation.
- Increased ***closures of city centre roads could cause congestion on the reduced number of open roads***.
- There is limited consideration of ***the dependence of HGV deliveries on businesses*** in the area. Limiting access to businesses by restricting loading bays would cause problems for some businesses.
- ***Coaches need to be accommodated more easily***, especially with improved drop-off and pick-up points. This is particularly important due to the region's dependence on tourism.
- ***A lack of city centre car parking spaces currently leads to congestion*** whilst people are looking for spaces.

8.2 General

- Parking at the ***airport*** is not suitably priced and there is no direct public transport link from the rail station to the airport.
- Through improved ***train links to London*** there would be access to a higher quality workforce.
- There is a need for greater accommodation and access for ***disabled people*** using public transport.
- There are some concerns that the ***NDR*** 'ends in the middle of nowhere'.. It was also suggested that the NDR 'should join up to the southern bypass at the west of the city', therefore removing the gap between the roads and providing more comprehensive access.
- The NDR would improve ***access to North Norfolk***, with similar effects to the south Norwich bypass. This would also reduce journey times to the area.

Appendix A. Questionnaire (example)

Norwich Area Transportation Strategy

In order to provide your views on the Norwich Area Transportation Strategy and how it will affect your business, please respond to the questions below. The Strategy includes the Northern Distributor Road (NDR) and an associated package of improvements to public transport, walking and cycling.

We very much appreciate your participation.

Company Profile

1. What is the name of your company?

2. Please provide the postcode for the location of your company

3. Which sector best describes your business?

- *Agriculture, fishing and food*
- *Utilities (energy and water)*
- *Manufacturing*
- *Building and construction*
- *Distribution*
- *Tourism, hospitality & leisure*
- *Retail*
- *Creative industries*
- *Transport*
- *IT*
- *Banking, finance and insurance*
- *Public administration, health and education*
- *Other*

4. Are you a member of the Chamber of Commerce?

- *Yes*
- *No*

Location

5. **Where is your business located (i.e. where are most employees based)?**
PLEASE BASE ALL FUTURE ANSWERS ON THIS MAIN LOCATION

- ○ *Norwich City*
- ○ *South Norfolk*
- ○ *Broadland*
- ○ *Breckland*
- ○ *Great Yarmouth*
- ○ *King's Lynn and West Norfolk*
- ○ *North Norfolk*

6. **What were your main reasons for choosing this location? (Tick those that apply)**

- ☐ *Proximity to key suppliers*
- ☐ *Proximity to customers*
- ☐ *Proximity to workforce*
- ☐ *Public transport links*
- ☐ *Proximity to air/ferry ports*
- ☐ *Accessibility by road*
- ☐ *Cost of premises*
- ☐ *Suitability of premises*
- ☐ *Quality of the environment*
- ☐ *Availability of land for expansion*
- ☐ *Broadband accessibility/width*
- ☐ *Other*

Any further comments

7. **Are there any weaknesses about your current location? (Tick those that apply)**

- ☐ *Proximity to key suppliers*
- ☐ *Proximity to customers*
- ☐ *Proximity to workforce*
- ☐ *Public transport links*
- ☐ *Proximity to air/ferry ports*
- ☐ *Accessibility by road*
- ☐ *Cost of premises*
- ☐ *Suitability of premises*
- ☐ *Quality of the environment*
- ☐ *Availability of land for expansion*
- ☐ *Broadband accessibility/width*
- ☐ *Other*

Any further comments

8. **Do you have a green travel plan for employees/visitors?**

- ○ *Yes*
- ○ *No*

9. **Are you considering . . .**

- ☐ *Expanding the business*
- ☐ *Downsizing the business*
- ☐ *Relocating the business*
- ☐ *Diversifying the business*
- ☐ *No change*

Any further comments

10. **If you are considering relocating, to what extent is the lack of adequate transport infrastructure a contributor to your decision?**

- ○ *Transport is the only contributor*
- ○ *Major contributor*
- ○ *Minor contributor*
- ○ *Not a contributor*

Any further comments

11. **If you are considering downsizing, to what extent is the lack of adequate transport infrastructure a contributor to your decision?**

- ○ *Transport is the only contributor*
- ○ *Major contributor*
- ○ *Minor contributor*
- ○ *Not a contributor*

Any further comments

12. **If you are considering expanding, to what extent is the provision of adequate transport a contributor to your decision?**

- ○ *Transport is the only contributor*
- ○ *Major contributor*
- ○ *Minor contributor*
- ○ *Not a contributor*

Any further comments

13. **To what extent do you agree that the following transport problems are affecting your business performance?**

	Strongly agree	*Agree*	*Neither agree nor disagree*	*Disagree*	*Disagree strongly*
Congestion	○	○	○	○	○
Delays	○	○	○	○	○
Unreliable journey times	○	○	○	○	○
Poor public transport links	○	○	○	○	○
Lack of alternative options	○	○	○	○	○

Staff

14. **Approximately, how many people are employed across your business (full-time and part-time)?**

	Full-time	*Part-time*
None	☐	☐
1 - 5	☐	☐
6 - 10	☐	☐
11 - 20	☐	☐
21 - 50	☐	☐
51 - 100	☐	☐
101 - 150	☐	☐
151 +	☐	☐

15. **How easy is it to recruit staff for your current location?**

○ *Very easy*
○ *Quite easy*
○ *Neither easy nor difficult*
○ *Quite difficult*
○ *Very difficult*
○ *Not applicable*

16. **To what extent is the existing transport infrastructure a barrier to recruiting staff for your current location?**

○ *A significant barrier*
○ *A major barrier*
○ *A minor barrier*
○ *Not a barrier*

17. **Approximately, how far do the majority of staff live from the business?**

	0% - 20%	*21% - 40%*	*41% - 60%*	*61% - 80%*	*81% - 100%*	*Not known*
Less than 2 miles						
3 - 6 miles						
7 - 10 miles						
11 - 20 miles						
21 - 40 miles						
Over 40 miles						
Not known						

18. **What percentage of staff use each of the following mode of transport as their main mode of transport to come to work?**

	0% - 20%	*21% - 40%*	*41% - 60%*	*61% - 80%*	*81% - 100%*	*Not known*
Car						
Car lift share						
Train						
Bus						
Taxi						
Motorcycle						
Cycle						
Walk						
Work from home						
Other						

Customers and Suppliers

19. **How far from your business are most of your principal customers and suppliers located?**

	Less than 2 miles	*3 - 6 miles*	*7 - 10 miles*	*11 - 20 miles*	*21 - 40 miles*	*Over 40 miles*	*Don't know*
Customers							
Suppliers							

20. **How easy do they find it to access the business site?**

	Very easy	*Quite easy*	*Neither easy nor difficult*	*Quite difficult*	*Very difficult*	*Don't know*
Customers						
Suppliers						

21. **What main mode of transport do they typically use?**

	Car	*Train*	*Bus*	*Taxi*	*Cycle*	*Walk*	*Plane*
Customers							
Suppliers							

Transport Solutions

22. **To what extent would the solutions proposed in the Norwich Area Transportation Strategy, including the Northern Distributor Road, help your business performance?**

	A big impact	*A small impact*	*No impact*	*Don't know*
Recruitment of staff				
Access to customers				
Access to suppliers				
Potential for expansion				
Performance compared to competitors				
Improved links to the airport				

Any further comments

23. **To what extent would the main proposed transport interventions within the Norwich Area Transportation Strategy, including the Northern Distributor Road, help your business performance?**

	Large positive impacts	*Some positive impacts*	*No change*	*Some negative impacts*	*Large negative impacts*
Bus Rapid Transit					
Northern Distributor Road					
Bus infrastructure improvements					
Rail service improvements					
Improved links to the airport					
Tram-train link to Rackheath					
Cycling measures					
Walking measures					
New traffic control technology					
Expansion of park and ride					
City centre circulation changes					
Freight consolidation initiatives					

Any further comments

24. **How important is the use of a car for meetings based in Norwich?**

- [ ] *Significant importance*
- [ ] *Major importance*
- [ ] *Minor importance*
- [ ] *Not important*

Any further comments

25. **Overall, do you agree that the Norwich Area Transportation Strategy will improve the local economy?**

- ○ *Strongly agree*
- ○ *Agree*
- ○ *Neither agree nor disagree*
- ○ *Disagree*
- ○ *Disagree strongly*

26. **Would you like to make any other comments on any aspects of the consultation document or transportation in Norwich generally?**

Thank you.