Lambeth Business Survey 2015 – Survey Report

A Report to London Borough of Lambeth

March 2015

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1.0 Introduction

This report sets out the findings of the Lambeth Business Survey 2015.

1.1 Study Objectives

Lambeth Council commissioned Ecorys to undertake a survey of businesses across the borough in 2015. The aim of the survey was to obtain reliable information from a representative sample of businesses and employers including appropriate coverage by type of business, size of business and geography.

Topics covered in the survey include business demographic information, the business economy, business aspirations, views on running a business in the area, opportunities and challenges they face, business ownership, employment, staff recruitment and engagement with the Local Authority.

The Lambeth Business Survey is designed to form part of the developing evidence base that Lambeth Council is using with its partners to inform strategy and priorities through:-

- Providing robust and reliable data with insightful analysis to inform the development of the Lambeth Investment and Opportunity Strategy, the Lambeth Local Plan, the Employment Land Review, Employment and Enterprise initiatives and engagement with businesses and employers.
- Gaining a representative and nuanced understanding of views and experiences of Lambeth businesses.
- Gaining an understanding of views and experiences of business within Lambeth by type of business, size of business and business location.
- Helping inform how Lambeth Council engages with the range of businesses in the future, through considering their preferred methods.
- Identifying key trends with reference to previous findings from Lambeth business surveys undertaken in 2011.
- Benchmarking findings in relation to various economic measures from the recent London Business Survey 2014 where applicable.

The results of this study will therefore inform the development of Lambeth Council's Investment and Opportunity strategy, the Lambeth Local Plan, the Employment Land Review and the Employment and Enterprise initiatives and will also support future engagement between Lambeth council and local businesses/employers.

This report outlines the findings of the 2015 Lambeth Business Survey carried out by Ecorys. The questionnaire in 2015 was based on that used in previous years (to allow for continuity and comparison of data) whilst additional relevant questions/topics were also addressed appropriate to the current business climate.

Comparisons are made throughout the report to findings from the 2011 Lambeth Business Survey and the recent London Business Survey (2014) conducted by the GLA.

1.2 Methodology

Surveys were completed by telephone and face-to-face with business owners/managers within the Lambeth area. Interviews lasted between 13 and 45 minutes with an average interview length of 19 minutes.

A detailed methodology is provided as appendix 1 to this document.

Fieldwork took place between 21st January and 20th February 2015.

1.2.1 Sample and weightings

A total of 726 interviews were completed with businesses. 684 were completed by telephone and 42 were completed face-to-face. Initial contact was made with all businesses (where possible) by telephone with face-to-face interviews arranged on request of businesses.

In order for comparisons to be made between Co-operative Local Investment Plan (CLIP) areas and to ensure samples within each of these were robust for analysis, quotas were set to ensure a minimum of 100 interviews were completed with businesses in each CLIP area.

The table below shows the number of interviews completed in each of the CLIP areas.

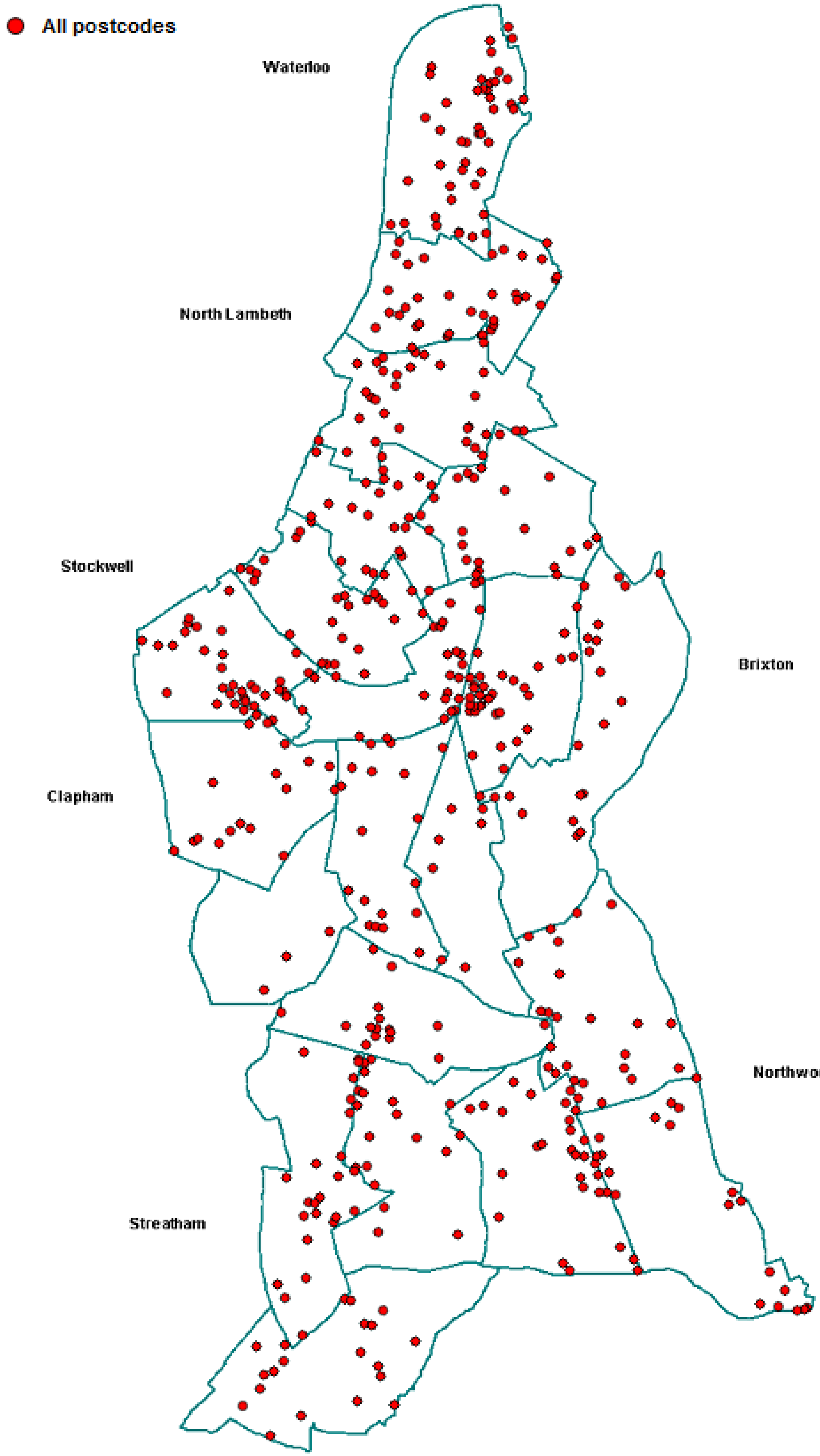
Figure 1 – CLIP area

	Number
Brixton	101
Clapham	115
North Lambeth	105
Norwood	102
Stockwell	102
Streatham	101
Waterloo	100

Base: 726

Map 1 overleaf shows the location of businesses who took part in the survey. *NB: all maps throughout the report are based on un-weighted data. Where postcodes are very close to borough boundaries it may appear as though they lie outside of the borough, however all surveyed businesses addresses were checked against borough boundary and confirmed to be in the borough. Where multiple businesses surveyed share a postcode the postcode is marked by a single circle.*

Map 1: Location of businesses taking part in the survey



ECORYS

Interviews were completed with the business owner/manager to ensure accurate data was achieved.

Quotas were also set by Sector and Size (based on employee counts) to ensure data is representative of the business population of the borough by these factors. The sample achieved is as close to target quotas as possible taking into account time limitations for fieldwork, response rates and availability of business contact details.

Figure 2 details the breakdown of the sample achieved by sector, along with business population data for the borough of Lambeth.[1]

Figure 2 - Type of business

	Number of interviews	Achieved sample %	Population %
Agriculture	1	<1%	.1%
Production	24	3%	2.6%
Construction	35	5%	5.6%
Motor Trades	19	3%	1.0%
Wholesale	9	1%	3.0%
Retail	98	14%	8.5%
Transport and Storage	17	2%	1.7%
Accommodation and food	82	11%	7.8%
Information and communication	53	7%	14.6%
Finance and Insurance	10	1%	1.5%
Property	26	4%	3.6%
Professional, scientific and technical	113	16%	23.0%
Business Administration and Support Services	41	6%	8.5%
Public Administration and Defence	1	<1%	.8%
Education	28	4%	2.4%
Health	49	7%	6.1%
Arts, Entertainment, Recreation and Other Services	120	17%	9.2%

Base: 726

The figure overleaf shows the size profile (based on employee counts) of businesses in the achieved sample, along with population data for the borough of Lambeth.[2]

[1] Population figures are based on adjusted ONS data (see appendix 1).
[2] Population figures are based on adjusted ONS data (see appendix 1).

Figure 3 - Size of business

	Number of interviews achieved	Achieved sample %	Population* %
Micro (0-9)	545	75.1%	86.1%
Small (10-49)	151	20.8%	11.2%
Medium (50-249)	28	3.9%	2.4%
Large (250+)	2	0.3%	0.4%

Un-weighted Base: 726

Following the methodology used in the 2011 Lambeth Business Survey (to allow for reliable comparisons to be made) data in this report is weighted by Sector and Size to represent the business population of the borough.

1.2.2 Business Ownership

A series of questions about business ownership were asked of all micro and small businesses (those with up to 49 employees) taking part in the survey[3].

Micro/small businesses claim to have between 1 and 80 owners or partners, with the average being 1.6. Approximately two thirds have 1 owner (65%) with just over a quarter (27%) having 2 owners.

Figure 4 – Gender of business owners/partners

	Range	Average number of owners/partners
Male	0-41	1.1
Female	0-39	0.5

Weighted base: 696 (all micro/small businesses)

Figures suggest some 58% of businesses taking part in the survey to be majority owned by males and 18% majority owned by females.

Figure 5 –Gender of business owners/partners *Majority ownership**

	%
Male	58%
Female	18%
No majority	14%
Don't know	10%

*Weighted base: 696 (all micro/small businesses)*Majority ownership includes businesses where more than 50% of owners/partners are in the category*

The highest proportion of business owners/partners are from white ethnic backgrounds.

[3] (NB. Not all business owners/partners are employed at the Lambeth location, therefore the number of owners/partners can be greater than the number of employees at the site).

Figure 6 – Ethnicity of business owners/partners

	Range	Average
White	0-74	1.16
Black	0-7	0.13
Asian	0-5	0.14
Mixed/Other	0-4	0.12

Weighted base: 696 (all micro/small businesses)

Some 60% of businesses surveyed are majority owned by those from White ethnic backgrounds.

Figure 7 – Ethnicity of business owners/partners *Majority ownership*

	%
White	60%
Black	9%
Asian	8%
Other/ Mixed	7%
No majority	3%
Don't know	13%

Weighted base: 696 (all micro/small businesses)

Some 4% of business have a least one disabled owner/partner, with the number of disabled owners at businesses ranging from 0 to 2.

In recording the proportion of their owners living within the London Borough of Lambeth, 44% claim the majority of their owners/partners to live within the London Borough of Lambeth, with the number ranging from 1 to 25.

Figure 8 – Number of business owners/partners living within the London Borough of Lambeth.

	Range	Average
Live within the Borough	0-25	0.7

Weighted base: 696 (all micro/small businesses)

Figure 9 – Home location of business owners/partners *Majority ownership*

	%
Within borough of Lambeth	44%
Outside borough of Lambeth	40%
No majority	3%
Don't know	13%

Weighted base: 696 (all micro/small businesses)

1.3 Structure of Report

The remainder of this report is structured as follows:

- Section 2 provides a summary of the main findings of the research. This section also provides a summary of findings compared with 2011 Lambeth Business Survey data, comparisons to key findings from the London Business Survey 2014 and summaries of headline findings by sector, size and CLIP area. Statistically significant differences are highlighted throughout the report where differences are significant to the overall sample at the 5% level. This means that the difference recorded is more than what may occur through sampling area or random chance.
- Section 3 presents the detailed findings of the research, with findings illustrated through tables, charts and maps as appropriate.
- Section 4 provides conclusions and recommendations for the future.

NB: Throughout the report numbers in charts/tables and where categories are combined, numbers may not add up to 100% (e.g. 99%/101%) due to rounding error.

2.0 Summary of Main Findings

2.1 Background Information/Business Demographics

- Two thirds of businesses taking part in the survey were registered businesses.

- Almost half of businesses have been trading in the borough for more than 10 years whilst some 12% of businesses had started trading within the last 2 years.

- Whilst 85% of businesses surveyed expect to be trading in Lambeth in 3 years time, 10% suggest this to be unlikely or very unlikely. Businesses in Brixton and Clapham were most confident about trading in Lambeth in 3 years time.

- In considering why they did not expect to be trading in Lambeth in 3 years time, highest proportions of businesses referred to relocating or moving to a different area.

2.2 Business Economy and Aspirations

- Six out of ten businesses (61%) rated Lambeth as a 'good' or 'very good' place to do businesses with only 6% rating Lambeth as 'poor' or 'very poor' as a place to do business and one in three as average. **This shows an improvement on findings reported in the 2011 Lambeth Business Survey where 38% rated Lambeth as 'good' or 'very good' and 22% as 'poor' or 'very poor'.**

- Being near to good transport links (30%), being a generally 'good location' (29%) and being close to central London (21%) were considered strengths of Lambeth as a business location.

- Parking was spontaneously referred to by one in five businesses (20%) surveyed as a limitation to Lambeth as a business location.

- One in four businesses (24%) located within BID areas agreed or strongly agreed that being located in the BID area had positively benefitted their business.

- Six out of ten businesses have objectives to grow over the next three years. 14% expect to grow to become a much larger businesses, with the highest proportion (47%) expecting to grow slowly and gradually get bigger. Overall, only 3% expect to reduce the scale of their operations over this period with one in three looking to maintain the business roughly as it is. **These figures are similar to those reported in the 2011 Lambeth Business Survey where 60% expected to see growth and 5% to reduce the scale of their operations.**

2.3 Employment

- The majority (87%) of businesses surveyed have between 0 and 9 employees.

- In considering change in employment numbers over the last 12 months, one in five businesses (20%) claimed the number of employees at their business to have increased with only 7% reporting a decrease. **This shows an improvement on the position in the 2011 Lambeth Business Survey where 14% had experienced an increase and 19% a decrease in employee numbers over the previous 12 months. This is also positive in comparison to findings in the 2014 London Business Survey where 13% reported an increase over this period and 12% a decrease.**

- Encouragingly 30% of businesses expect to see an increase in staff numbers over the next 12 months with only 2% overall expecting to see a decrease. **Again this shows an improvement on the results from the 2011 Lambeth Business Survey where 23% had expected to see an increase and 19% a decrease in employee numbers over the next 12 months.** This is also positive in comparison to findings in the 2014 London Business Survey where 22% expect to see an increase over this period and 3% a decrease

- The majority suggested there were no skills gaps or were unable to identify particular skills lacking in their current workforce (82%).

2.4 Recruitment

- In considering the methods they used to recruit staff, more than one in three (35%) businesses surveyed referred to word of mouth.

- In considering whether they felt there were any challenges to recruitment at the current time, encouragingly three quarters of businesses (74%) suggested there were none. A lack of applicants with the required skills was discussed by the highest proportion, 13%.

- 42% of businesses taking part in the survey make particular effort to recruit local people. Businesses who did make a particular effort to recruit local people most frequently cited transport and travel being easier as the reason for this.

- Some 15% of businesses taking part in the survey already offer Apprenticeships with a further 22% considering doing so in the future. In 63% of cases, businesses claim these Apprenticeships lead to people being taken on permanently.

- One in four businesses (25%) currently offer work experience placements (through schools, colleges, training/work placement agencies). In 46% of cases, work experience placements are claimed to lead to people being taken on permanently.

2.5 Business Engagement

- Overall, 40% of businesses suggest Lambeth council to be 'business friendly'.
- In discussing what the council could do differently to help their business, highest proportions (14%) referred to addressing parking issues.
- Highest proportions referred to their accountant when asked where they would go should they need help and advice for their business.
- In considering which methods of communication they found most useful in engaging with their customers, suppliers and partners, highest proportions referred to email communication being the most effective (69%) closely followed by telephone contact (60%).
- In considering future engagement between Lambeth Council and the business community, businesses overall most frequently suggested online information and consultation to be the best method to involve them in decisions about the local area, though more than a third (36%) mentioned face to face meetings with councillors and council officers and a third (32%) mentioned local meetings.

The grids overleaf provide overall summary analysis on key survey questions by Neighbourhood area, CLIP area, Sector, Size of business and the length of time they have been trading.

Where answers for categories are significantly more positive than the overall sample (statistically significant at the 5% level) cells are coloured Green.

Where answers for categories are significantly more negative than the overall sample (statistically significant at the 5% level) cells are coloured Red[4].

[4] Throughout the report, statistically significant differences are highlighted where differences are significant to the overall sample at the 5% level. This means that the difference recorded is more than what may occur through sampling area or random chance in 95 times out of 100.

Summary analysis by Neighbourhood area

Key question	Response	TOTAL	North Lambeth	Clapham	Brixton	Streatham	Norwood
Rating of Lambeth as a business location	Good (very good & good)	61%	63%	69%	62%	**50%**	54%
	Poor (poor & very poor)	6%	5%	6%	4%	8%	10%
Likely to be trading in 3 years time	Likely (very likely & likely)	85%	85%	84%	87%	80%	86%
	Unlikely (not likely & unlikely)	10%	8%	14%	7%	13%	7%
Objectives over next 3 years	Grow	62%	66%	64%	62%	59%	**50%**
	Reduce scale of operations	3%	2%	2%	2%	7%	6%
Change in staff numbers over past 12 months	Increased	20%	23%	20%	21%	19%	15%
	Decreased	7%	9%	6%	**3%**	6%	11%
Expected change in staff numbers over the next 12 months	Increase	30%	34%	33%	28%	25%	**20%**
	Decrease	2%	2%	4%	1%	2%	2%
Extent to which Lambeth Council is business friendly	A large extent/some extent	40%	40%	43%	**30%**	44%	41%
	Not very much/not at all	23%	21%	28%	28%	22%	17%

Significantly lower proportions of businesses in Streatham rated Lambeth as 'good' as a business location.

As shown, a significantly lower proportion (50%) of businesses in Norwood have growth objectives compared with the sample overall.

In reporting change in staff numbers over the past 12 months, significantly lower proportions in Brixton reported having seen a decrease, with significantly lower proportions in Norwood expecting to see an increase over the next 12 months compared with the sample overall.

While 40% overall suggest Lambeth Council to be business friendly, this is suggested by a significantly lower proportion of businesses in Brixton (30%).

Summary analysis by CLIP area

Key question	Response	TOTAL	Brixton	Clapham	North Lambeth	Norwood	Stockwell	Streatham	Waterloo
Rating of Lambeth as a business location	Good (very good & good)	61%	62%	68%	68%	54%	55%	**50%**	70%
	Poor (poor & very poor)	6%	4%	4%	3%	11%	9%	7%	6%
Likely to be trading in 3 years time	Likely (very likely & likely)	85%	87%	88%	84%	85%	85%	82%	82%
	Unlikely (not likely & unlikely)	10%	7%	12%	11%	7%	13%	12%	6%
Objectives over next 3 years	Grow	62%	62%	68%	67%	53%	61%	55%	66%
	Reduce scale of operations	3%	2%	**1%**	**0%**	7%	4%	7%	4%
Change in staff numbers over past 12 months	Increased	20%	21%	22%	30%	16%	**11%**	17%	29%
	Decreased	7%	**3%**	4%	11%	12%	12%	6%	4%
Expected change in staff numbers over the next 12 months	Increase	30%	28%	34%	36%	**21%**	28%	23%	39%
	Decrease	2%	1%	2%	1%	3%	4%	1%	3%
Extent to which Lambeth Council is business friendly	A large extent/some extent	40%	**30%**	47%	39%	43%	38%	41%	40%
	Not very much/not at all	23%	28%	30%	17%	17%	23%	22%	22%

The proportion of businesses in Streatham rating the area as ‘good’ as a business location is significantly lower than the overall sample.

Proportions of businesses in Clapham and North Lambeth expecting to reduce the scale of their operations over the next 3 years is significantly lower than the proportion reporting this overall.

The number of businesses in Stockwell having seen an increase in employee numbers over the last 12 months (11%) and the proportion in Norwood expecting to see an increase over the next 12 months (21%) are significantly lower than recorded by the overall sample.

While 40% overall suggest Lambeth Council to be business friendly, this is suggested by a significantly lower proportion of businesses in the Brixton CLIP area (30%).

Summary analysis by Sector

Key question	Response	TOTAL	Wholesale, retail & motor trades	Business Administration	Education, health & public admin	Arts, entertainment, recreation & other	Production, construction & agriculture	Accommodation & food	Info, comms, property, finance & insurance	Professional, scientific & technical
Rating of Lambeth as a business location	Good (very good & good)	61%	63%	57%	68%	53%	61%	56%	68%	57%
	Poor (poor & very poor)	6%	10%	10%	5%	5%	10%	11%	**1%**	5%
Likely to be trading in 3 years time	Likely (very likely & likely)	85%	80%	81%	81%	90%	88%	**95%**	83%	86%
	Unlikely (not likely & unlikely)	10%	12%	10%	6%	6%	8%	**3%**	14%	10%
Objectives over next 3 years	Grow	62%	**51%**	**78%**	67%	**48%**	69%	66%	**71%**	54%
	Reduce scale of operations	3%	5%	1%	3%	4%	8%	2%	**1%**	4%
Change in staff numbers over past 12 months	Increased	20%	**12%**	29%	24%	**12%**	17%	22%	24%	22%
	Decreased	7%	7%	4%	9%	6%	7%	11%	9%	7%
Expected change in staff numbers over the next 12 months	Increase	30%	**18%**	**43%**	**43%**	20%	28%	30%	37%	26%
	Decrease	2%	4%	3%	2%	3%	2%	2%	2%	2%
Extent to which Lambeth Council is business friendly	A large extent/some extent	40%	47%	49%	**55%**	41%	45%	**60%**	**31%**	**26%**
	Not very much/not at all	23%	30%	**11%**	**11%**	22%	26%	21%	26%	24%

The analysis shows that businesses across sectors are both positive and negative about different aspects of business, with no sectors providing consistently more positive responses than others.

In considering differences across the sectors which are significant at the 5% level, businesses in the ‘Information, Communication, Property, Finance and Insurance’ sector provide the more positive responses. The proportion in this sector rating the area as ‘poor’ is significantly lower than that recorded by the sample overall. Significantly higher proportions in this sector have growth objectives over the next three years with significantly lower proportions than overall expecting to see a reduction in the scale of their operations.

Businesses in the ‘Accommodation and Food’ sector significantly more frequently expect to be trading in the area in 3 years time, with the proportion in this sector suggesting this to be unlikely also significantly lower than that recorded overall. Businesses in this sector were most likely to report Lambeth Council as business friendly.

Across the sectors, the “Business Administration” sector had the highest proportions of businesses reporting objectives to grow over the next three years and the highest proportions expecting staff numbers to increase over the next 12 months (along with businesses in ‘Education, health and public administration’).

Those in the ‘Wholesale, Retail and Motor Trades’ and ‘Arts, Entertainment, Recreation and other services’ sectors significantly less frequently reported growth objectives with significantly higher proportions in the ‘Business Administration’ and ‘Information, Communication, Property, Finance and Insurance’ sectors expecting to see growth in the next 3 years.

Businesses in the ‘Wholesale, Retail and Motor Trades’ and ‘Arts, Entertainment, Recreation and other services’ had significantly less frequently seen employee numbers increase over the last 12 months.

Whilst significantly lower proportions of the those in the ‘Wholesale, Retail and Motor Trades’ sector also expected to see an increase in employee numbers over the next 12 months, significantly higher proportions of those in the ‘Business Administration’ and ‘Education, Health and Public Administration’ expected to see employee numbers increase over the next 12 months.

Of all of the sectors, it appears to be the ‘Wholesale, Retail and Motor Trades’ who are less positive across the key questions.

Summary analysis by Size

Key question	Response	TOTAL	Micro (0-9 employees)	Small (10-49 employees)	Medium/Large (50+ employees)
Rating of Lambeth as a business location	Good (very good & good)	61%	60%	65%	70%
	Poor (poor & very poor)	6%	6%	6%	3%
Likely to be trading in 3 years time	Likely (very likely & likely)	85%	84%	91%	88%
	Unlikely (not likely & unlikely)	10%	10%	8%	8%
Objectives over next 3 years	Grow	62%	60%	71%	63%
	Reduce scale of operations	3%	4%	1%	**0%**
Change in staff numbers over past 12 months	Increased	20%	18%	**39%**	30%
	Decreased	7%	7%	11%	15%
Expected change in staff numbers over the next 12 months	Increase	30%	28%	**41%**	38%
	Decrease	2%	2%	4%	6%
Extent to which Lambeth Council is business friendly	A large extent/some extent	40%	38%	51%	50%
	Not very much/not at all	23%	24%	17%	**8%**

NB: Care needs to be taken with the small sample size for medium/large employers.

Significantly higher numbers of small businesses have seen an increase in employee numbers over the last 12 months (39%) and expect to see an increase in employee numbers over the next 12 months (41%).

Whilst 3% overall expect to reduce the scale of their operations over the next 3 years, a significantly lower proportion (0%) of medium/large businesses suggested this to be the case.

Medium/large enterprises also significantly less frequently suggested Lambeth Council not to be business friendly.

Summary analysis by Time Trading in Lambeth

Key question	Response	TOTAL	Less than 2 years	2-5 years	5-10 years	More than 10 years
Rating of Lambeth as a business location	Good (very good & good)	61%	67%	59%	62%	60%
	Poor (poor & very poor)	6%	10%	5%	4%	7%
Likely to be trading in 3 years time	Likely (very likely & likely)	85%	87%	79%	90%	84%
	Unlikely (not likely & unlikely)	10%	11%	11%	8%	9%
Objectives over next 3 years	Grow	62%	**84%**	**75%**	69%	**48%**
	Reduce scale of operations	3%	1%	3%	**1%**	5%
Change in staff numbers over past 12 months	Increased	20%	25%	28%	24%	**15%**
	Decreased	7%	**2%**	5%	9%	9%
Expected change in staff numbers over the next 12 months	Increase	30%	**51%**	**43%**	31%	**18%**
	Decrease	2%	**0%**	1%	4%	2%
Extent to which Lambeth Council is business friendly	A large extent/some extent	40%	48%	42%	44%	35%
	Not very much/not at all	23%	17%	17%	21%	28%

Businesses who started trading in Lambeth in the last 2 years are more satisfied overall. As shown in the table above, they significantly more frequently refer to having seen a decrease in employee numbers in the last 12 months and expect to see a decrease in the next 12 months.

These businesses and those trading in Lambeth for between 2 and 5 years are significantly more likely to have growth objectives over the next 3 years and to expect to see an increase in employee numbers in the next 12 months.

Businesses who have been trading in Lambeth for 10 years or more are significantly less likely to have growth objectives, to have seen employee numbers increase over the last 12 months and to expect to see employee numbers increase in the next 12 months.

3.0 Research Findings

This section sets out the detailed findings of the survey.

3.1 Background Information/Business Demographics

- ***Two thirds of businesses taking part in the survey are registered businesses.***
- ***Almost half of businesses have been trading in the borough for more than 10 years whilst some 12% of businesses have started trading within the last 2 years.***
- ***Whilst 85% of businesses surveyed expect to be trading in Lambeth in 3 years time, 10% suggest this to be unlikely or very unlikely. Businesses in Brixton and Clapham are most confident about trading in Lambeth in 3 years time.***
- ***In considering why they did not expect to be trading in Lambeth in 3 years time, highest proportions of businesses refer to relocating or moving to a different area.***

The majority, two thirds, of businesses taking part in the survey claim to be registered businesses.

Figure 10 – Does the business fit into any of the following categories?

	%
Registered company (limited or plc)	67%
Unregistered business (not registered for VAT, not operating a PAYE system or not registered at Companies House)	1%
Sole trader	24%
Partnership	5%
A public sector body	<1%
A social enterprise	<1%
A not for profit organisation	5%
None of these	1%

Weighted base:726 (NB multiple response question)

Businesses in the 'Business Administration' and 'Information and Communication, Property, Finance and Insurance' sectors significantly more frequently report being registered companies (86% and 87% respectively).

As shown in the table above, 24% claim to be sole traders, with smaller proportions reporting to be in other categories. Businesses reporting to be sole traders include 39% in the 'Production, Construction and Agriculture', 'Health' (37%), 'Other services' (36%) and 'Professional, Scientific and Technical' (35%) sectors.

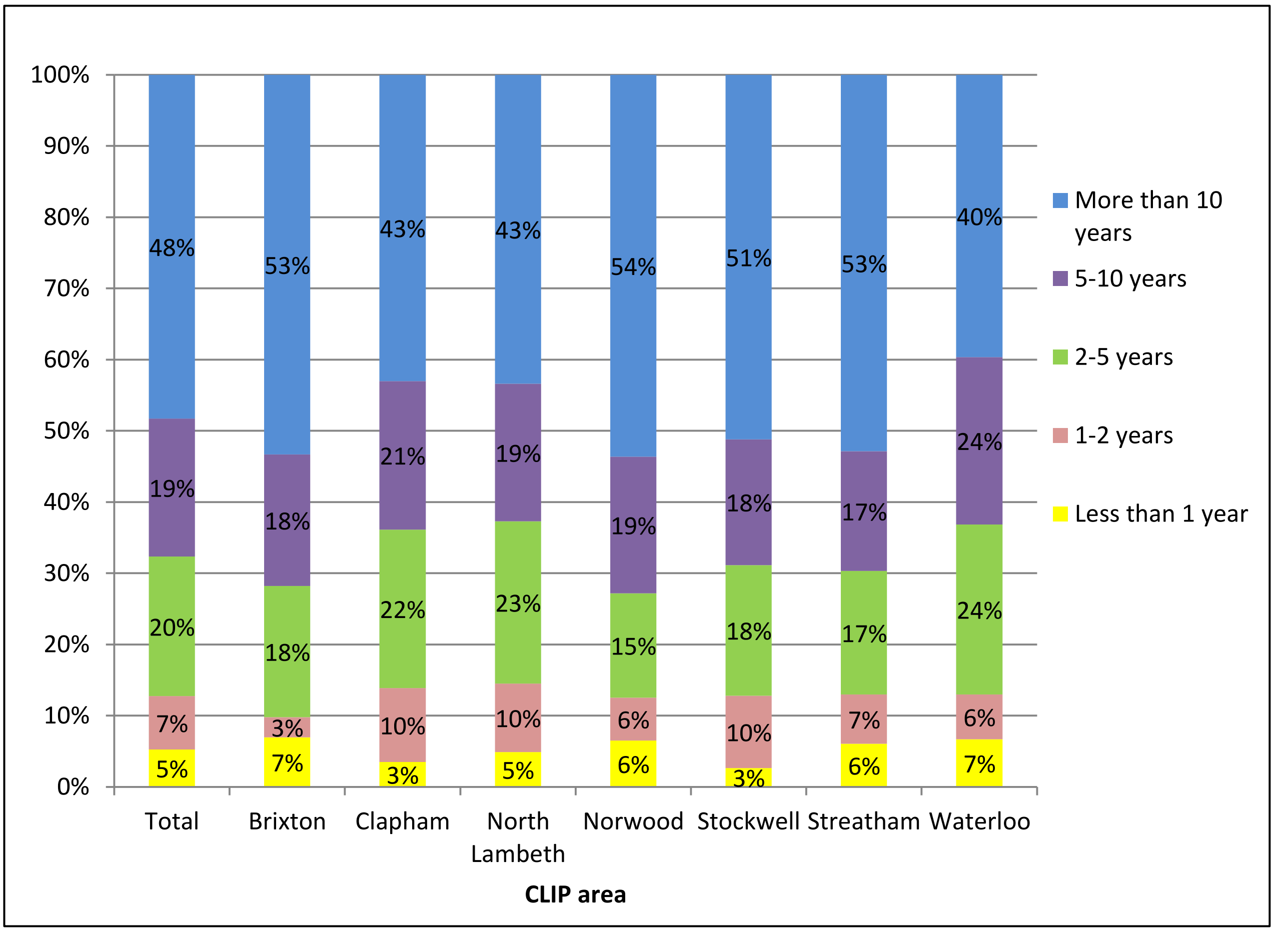
Highest proportions of medium and large size business (with 50 or more employees) claim to be registered companies (88%), with this the case for 83% of small businesses (those with 10-49 employees) and 64% of micro businesses (those with 0-9 employees).

Higher proportions of businesses majority owned by people who live within the borough of Lambeth are sole traders (35%) compared with 24% overall.

Some 35% of businesses majority owned by females claim to be sole traders compared with 24% of the sample overall. Sole traders are also most common among businesses majority owned by those from Black ethnic backgrounds (45% of these businesses claim to be sole traders.

As shown in the chart below, some 12% of businesses have started trading within the last 2 years, with almost half (48%) having been trading in the borough for more than 10 years.

Chart 1 – How long has this business been trading in Lambeth?

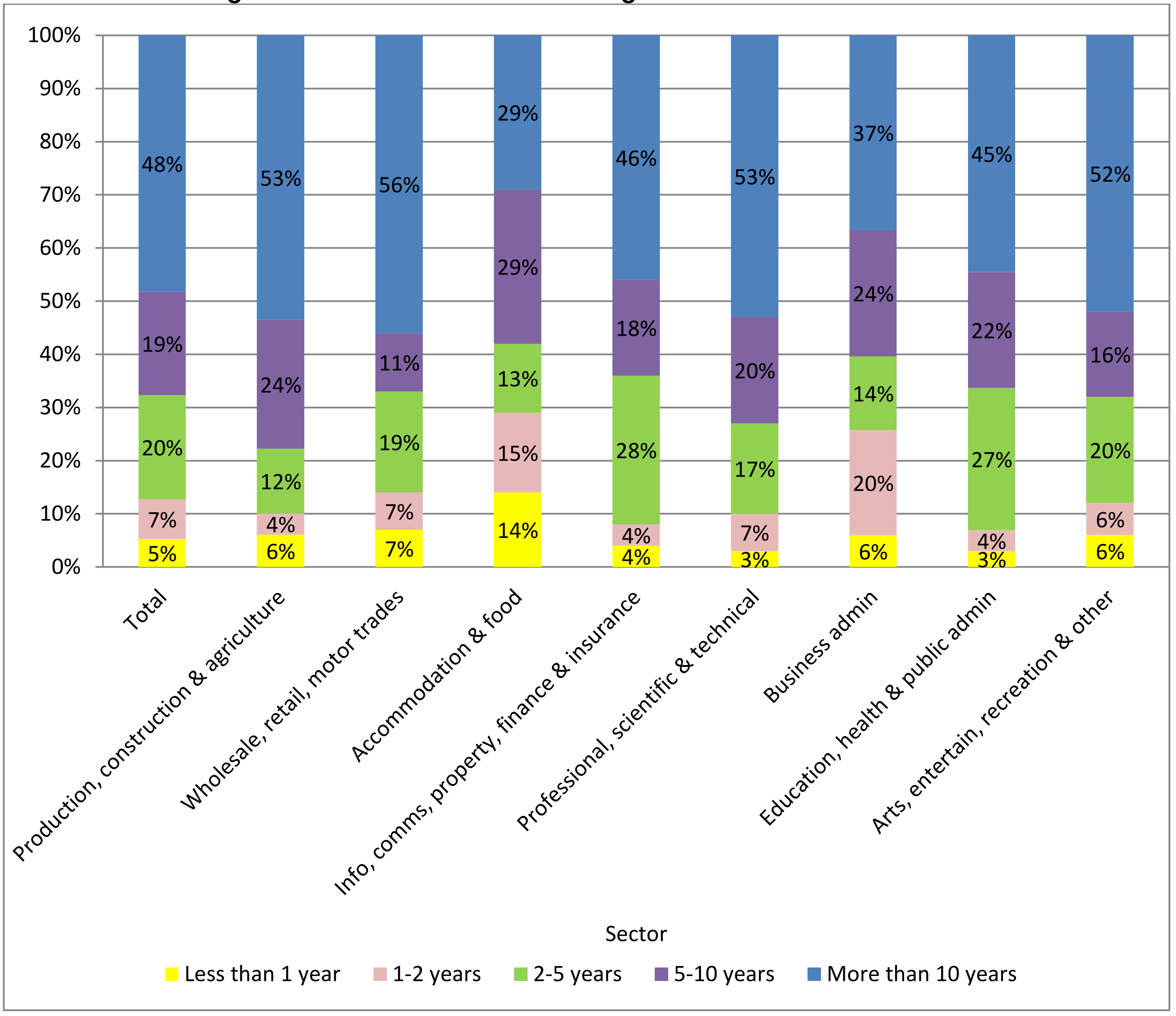


Weighted base:726

The proportion having been trading in Lambeth for more than 10 years ranges from 40% of businesses in Waterloo to 53% of businesses in Brixton and Streatham and 54% of businesses in Norwood.

Those who started trading in Lambeth within the last 2 years are most frequently in the 'Accommodation and Food' and 'Business Administration' sectors.

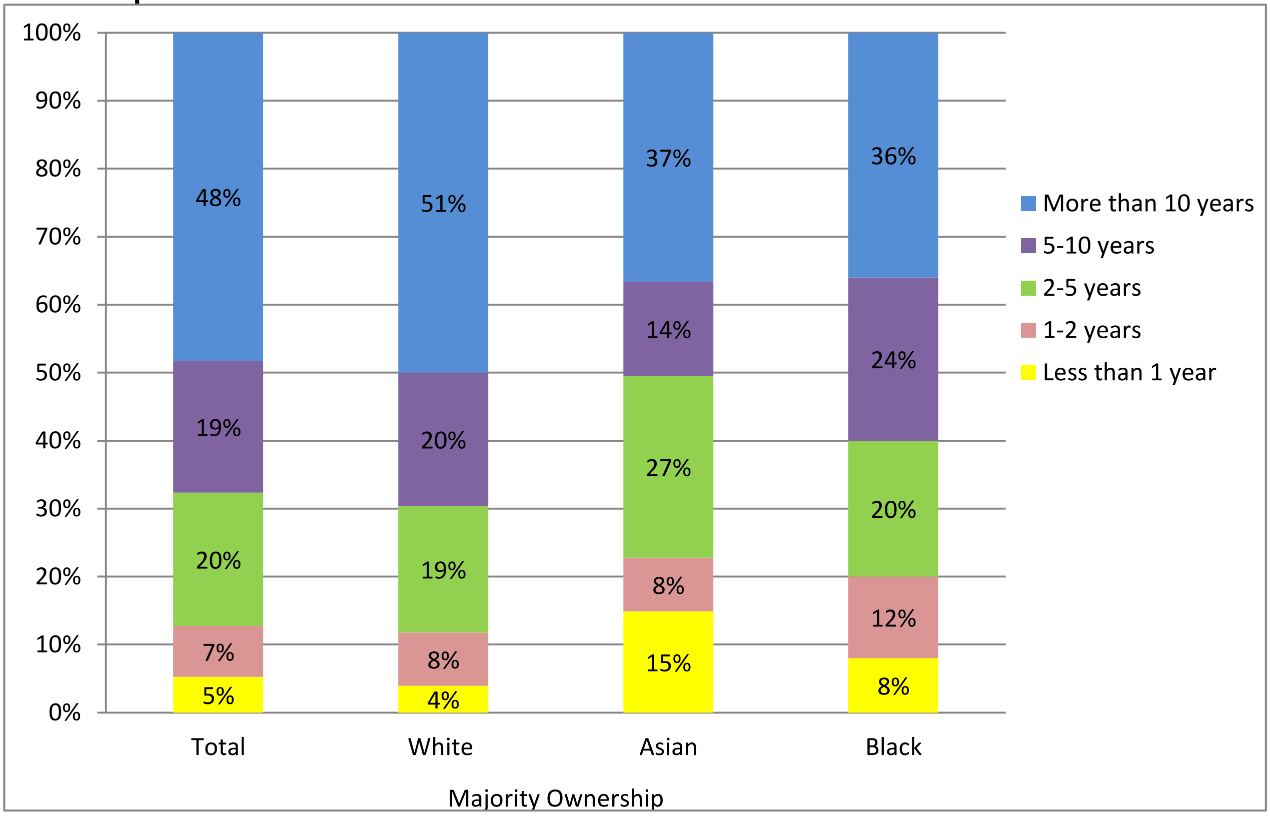
Chart 2 – How long has this business been trading in Lambeth?



Weighted base:726

When considering business ownership, some 23% of business majority owned by those from Asian backgrounds and 20% of those from Black ethnic backgrounds taking part in the survey have started trading within the last 2 years compared with 12% overall and 11% of those majority owned by those from White ethnic backgrounds, as shown in the chart overleaf.

Chart 3 – How long has this business been trading in Lambeth by majority ethnic ownership?

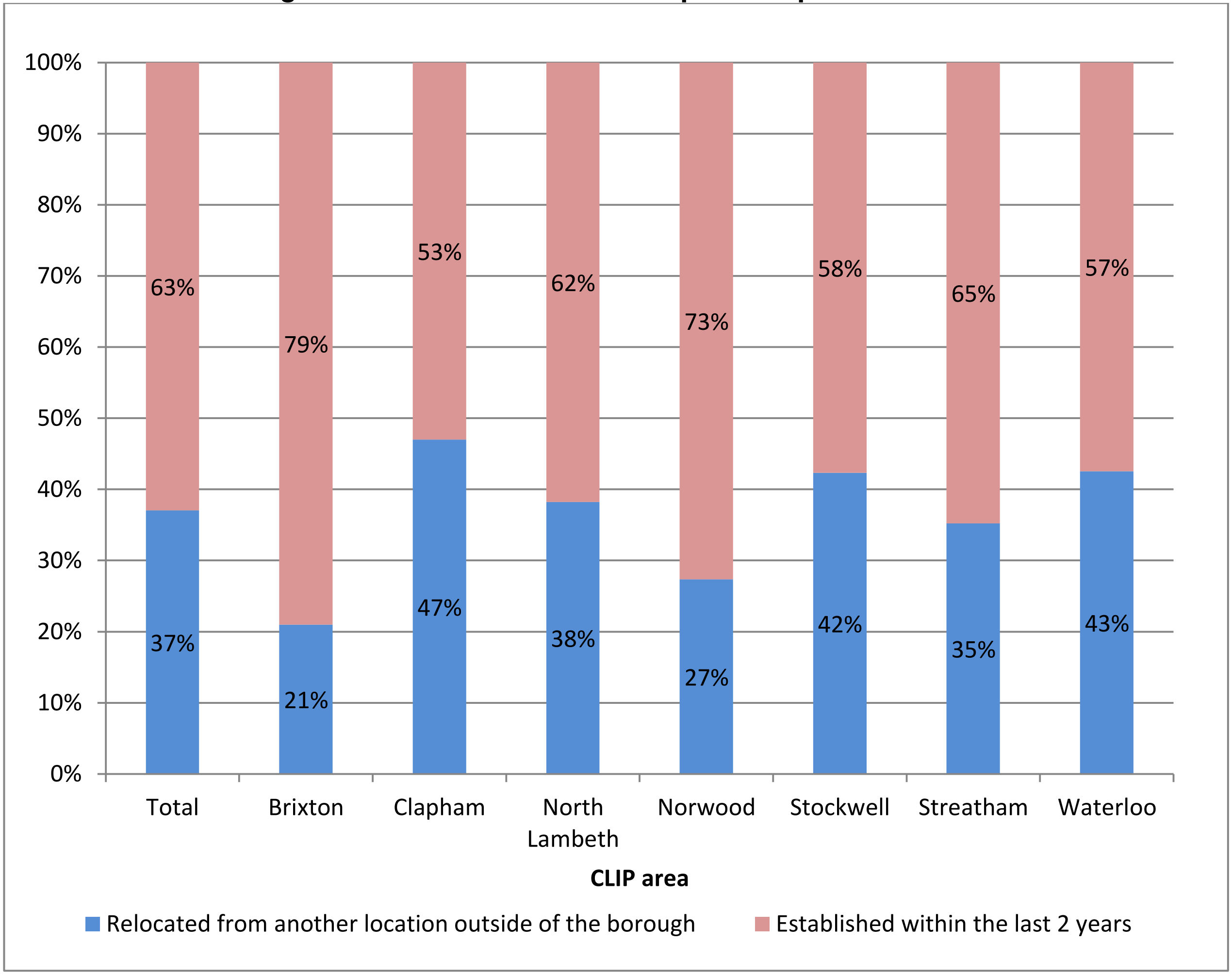


Weighted base:726

As shown in the chart above, some 51% of businesses majority owned by those from White ethnic backgrounds have been trading in the area for more than 10 years compared with businesses majority owned by those from Asian and Black ethnic backgrounds (37% and 36% respectively) reporting this.

Businesses who have started trading in Lambeth within the last 2 years were asked whether they had moved from another area outside of the borough or established the business at this point.

Chart 4 – When you started trading in Lambeth, did you move from another location outside of the borough or did the business start-up at this point?

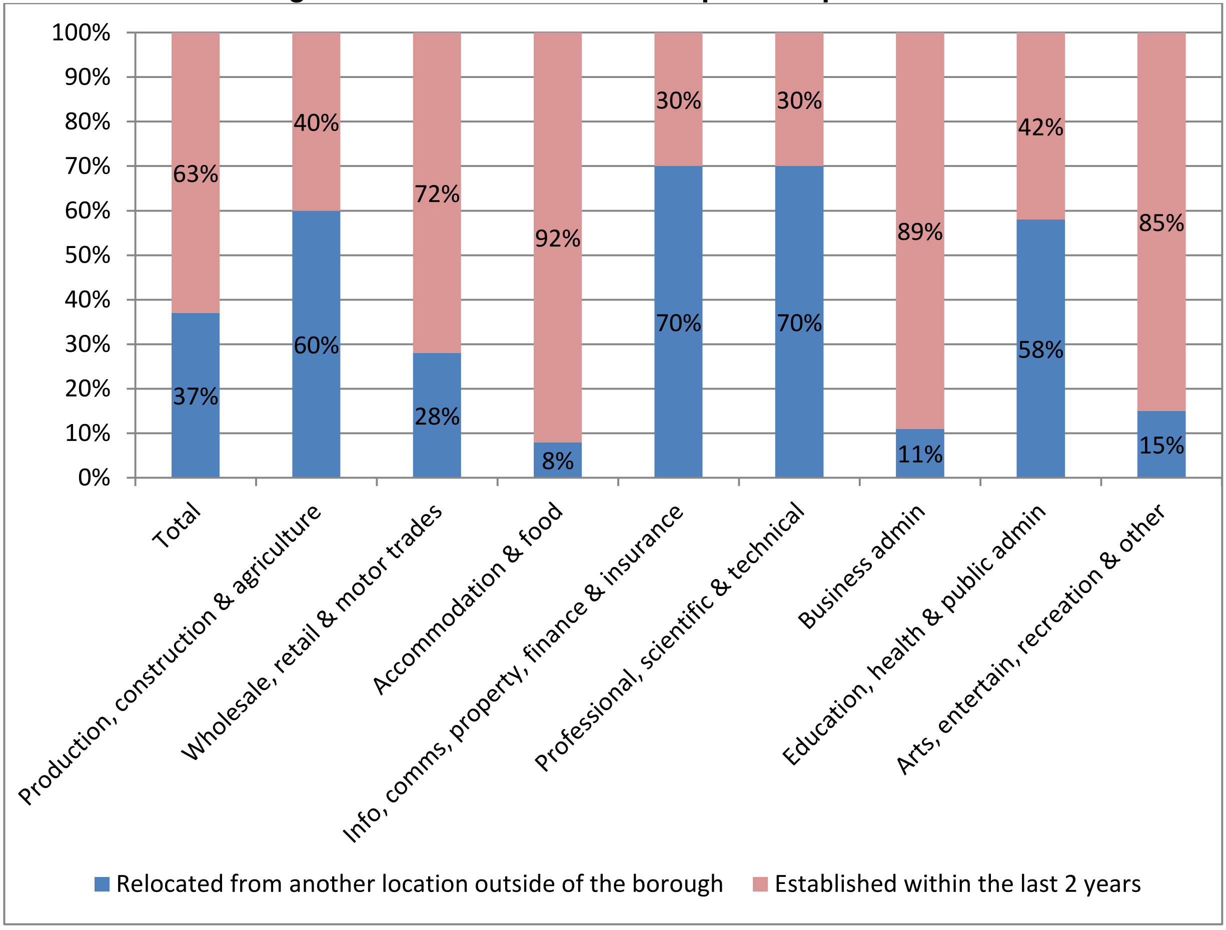


Weighted base:92 (Businesses trading in Lambeth for less than 2 years)

As shown, 63% have established their business within the last 2 years whilst a further 37% have moved their business into Lambeth from a different area. Businesses having established their business in Lambeth within the last two years are most frequently found in Brixton and Norwood. Businesses having relocated to Lambeth from outside of the borough within the last 2 years are most frequently found in Clapham, Waterloo and Stockwell.

Businesses in the 'Business Administration' (89%) and 'Accommodation and Food' (92%) sectors are among those who had more frequently established their business at this point.

Chart 5 – When you started trading in Lambeth, did you move from another location outside of the borough or did the business start-up at this point?



Weighted base:92 (Businesses trading in Lambeth for less than 2 years)

Businesses having started trading in BID areas within the last 2 years most frequently claim to have started their business at this point (79%) with only 21% of businesses starting trading in BID areas within the last 2 years having moved from another location outside of the borough.

In considering why they chose the location they did to establish their business in Lambeth, highest proportions refer to being familiar with the area, living in Lambeth or knowing the area well.

Figure 11 – Why did you choose this location for your business?

	%
Being familiar with the area/knowing the area well/living in Lambeth	41%
A good location	14%
Convenient Location	13%
Busy location/passing trade	7%
Transport links/near tube station	6%
Availability of premises	5%
Purchased business that was here	3%
Cost of premises/cheaper property than previous location	2%
Quality of premises	2%
Up and coming area	2%
Proximity to where staff live	2%
Size of premises	1%
Don't know	1%
Other	13%

Weighted base:92 (Businesses trading in Lambeth for less than 2 years)

Lambeth being a good location is also discussed by 14% along with it being convenient as a business location (13%), being busy/having passing trade (7%) and being close to transport links and tube stations (6%).

'Familiar with the area, saw changes and thought that Lambeth would be a good location for a restaurant'

(Micro business in the 'Accommodation and Food' sector, Brixton)

'A mixture of affordability on rent, and good catchment area for local workforce'

(Micro business in the 'Accommodation and Food' sector, Waterloo)

'Good location overall - after much research based on transport and available office space this location was chosen'

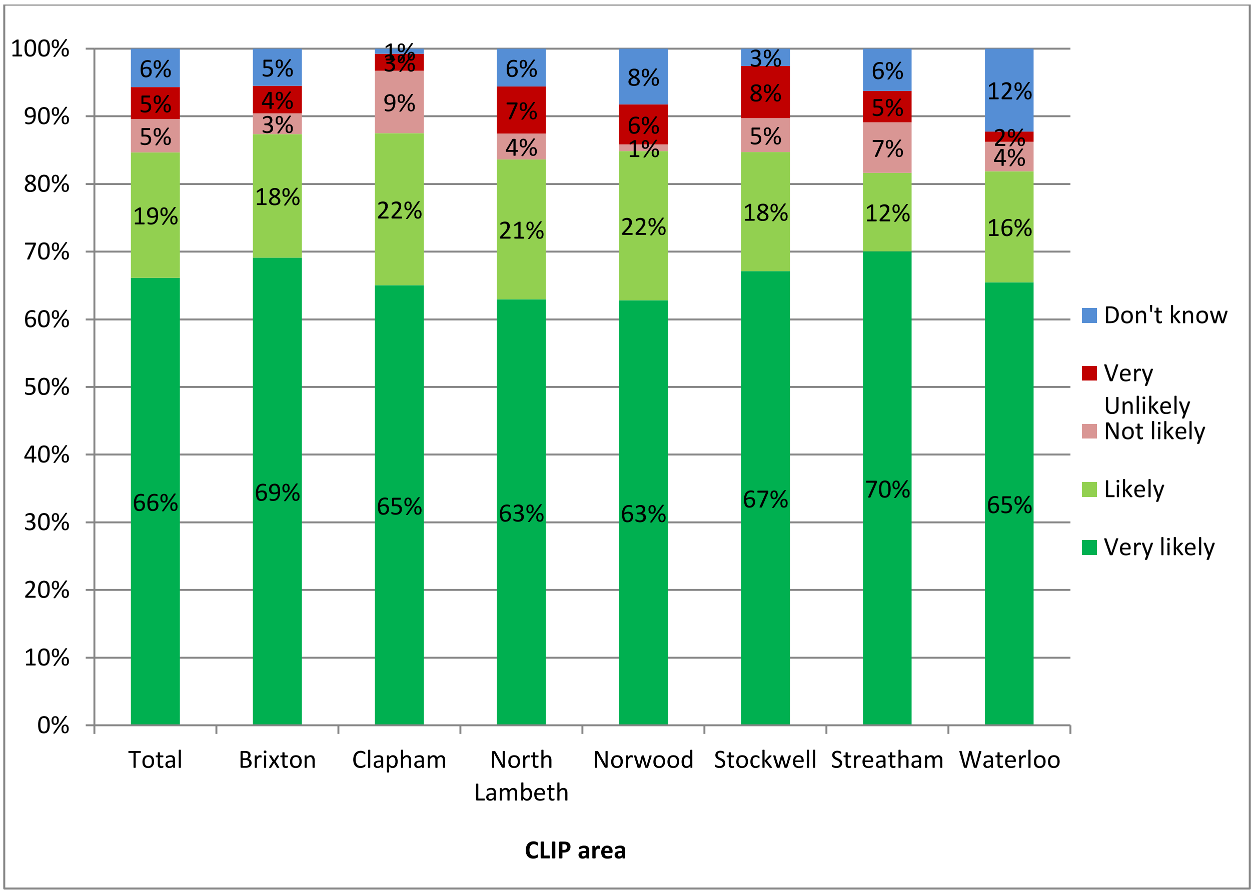
(Small business in the 'Arts, Entertainment and Recreation' sector, Stockwell)

'I live in Brixton, and I wanted to work within the community'

(Micro business in the 'Arts, Entertainment and Recreation' sector, Brixton)

Some 85% of businesses surveyed expect to be trading in Lambeth in 3 years time, with 5% suggesting this to be unlikely and the same proportion very unlikely.

Chart 6 – How likely are you to be trading in Lambeth in 3 years time?



Weighted base:726

As shown in the chart above, businesses in Brixton and Clapham are most confident about trading in Lambeth in 3 years time.

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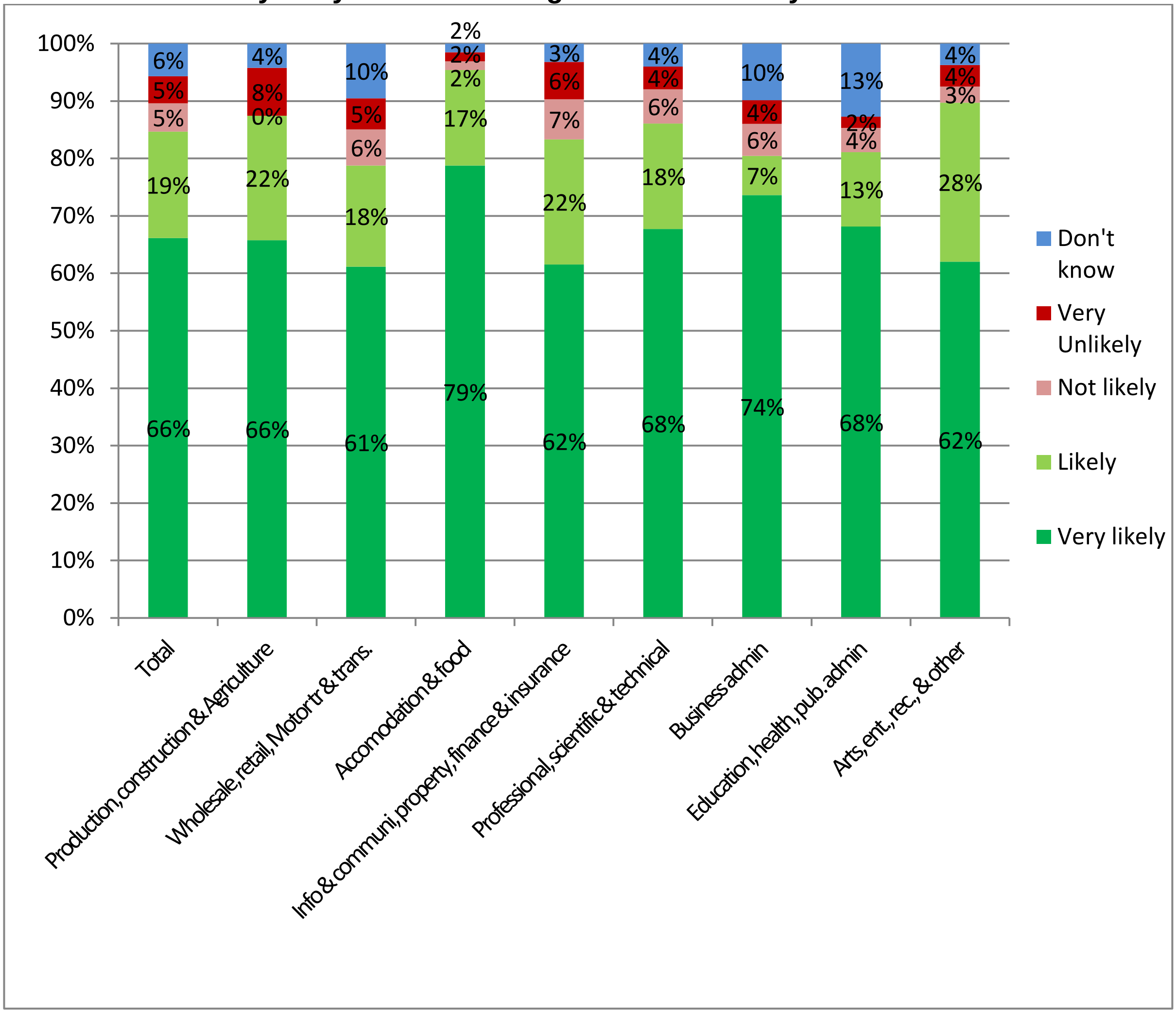
Chart 7 – How likely are you to be trading in Lambeth in 3 years time?



Weighted base:726

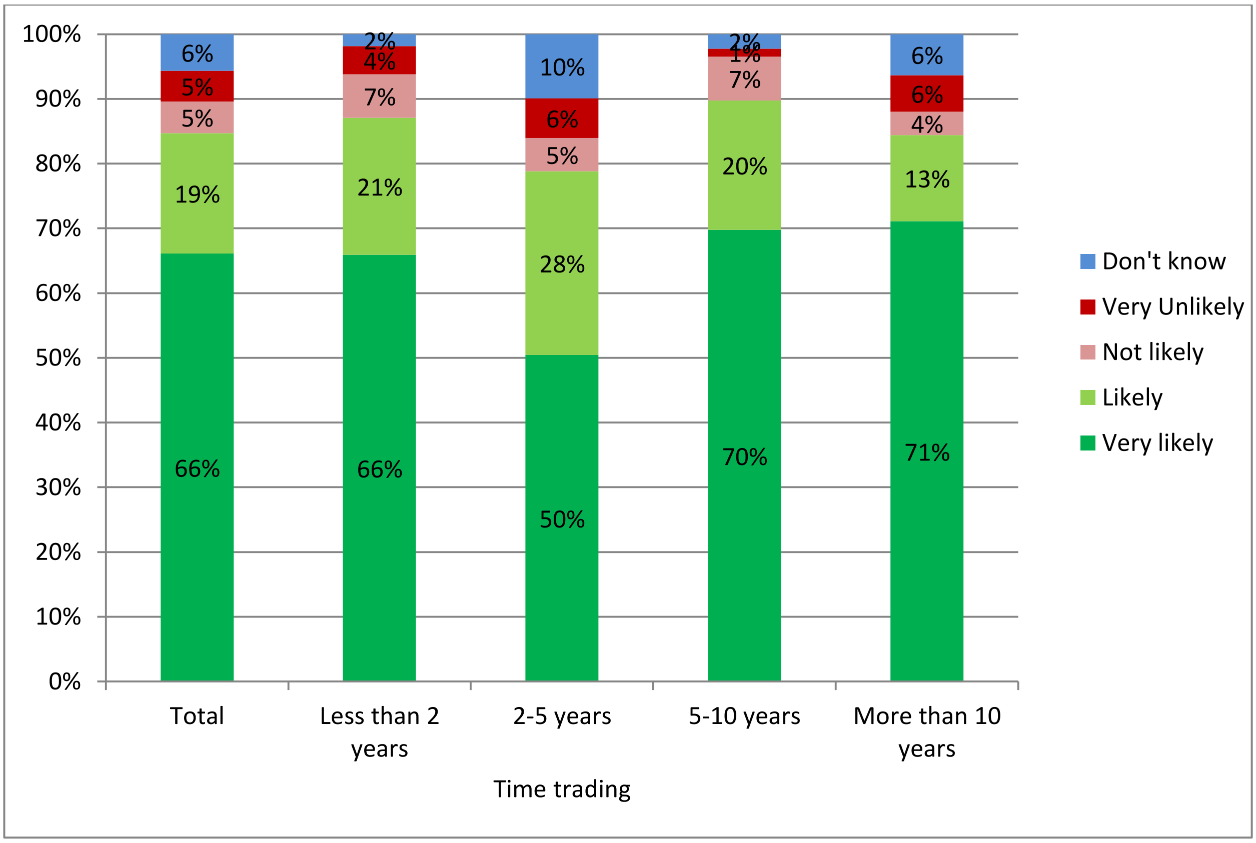
The 10% overall suggesting it to be unlikely that they will be trading in Lambeth in 3 years time ranges from 4% of businesses in the ‘Accommodation and Food’ sector to 11% of those in ‘Wholesale, Retail and Motor Trade’ and 13% in the ‘Information, Communication, Property, Finance and Insurance’ sectors.

Businesses in the ‘Accommodation and Food’ and ‘Business Administration’ sectors most frequently suggested they would be ‘very likely’ to be trading in Lambeth in 3 years time (79% and 74% respectively).

Some 80% of medium/large businesses said they will be very likely to be trading in Lambeth in 3 years time, with this the case for 77% of small and 64% of micro businesses.

Interestingly, as shown in the chart below, businesses who started trading within the last 2 years are more confident about continuing to trade in the area in 3 years time, along with those who have been established for 5-10 years.

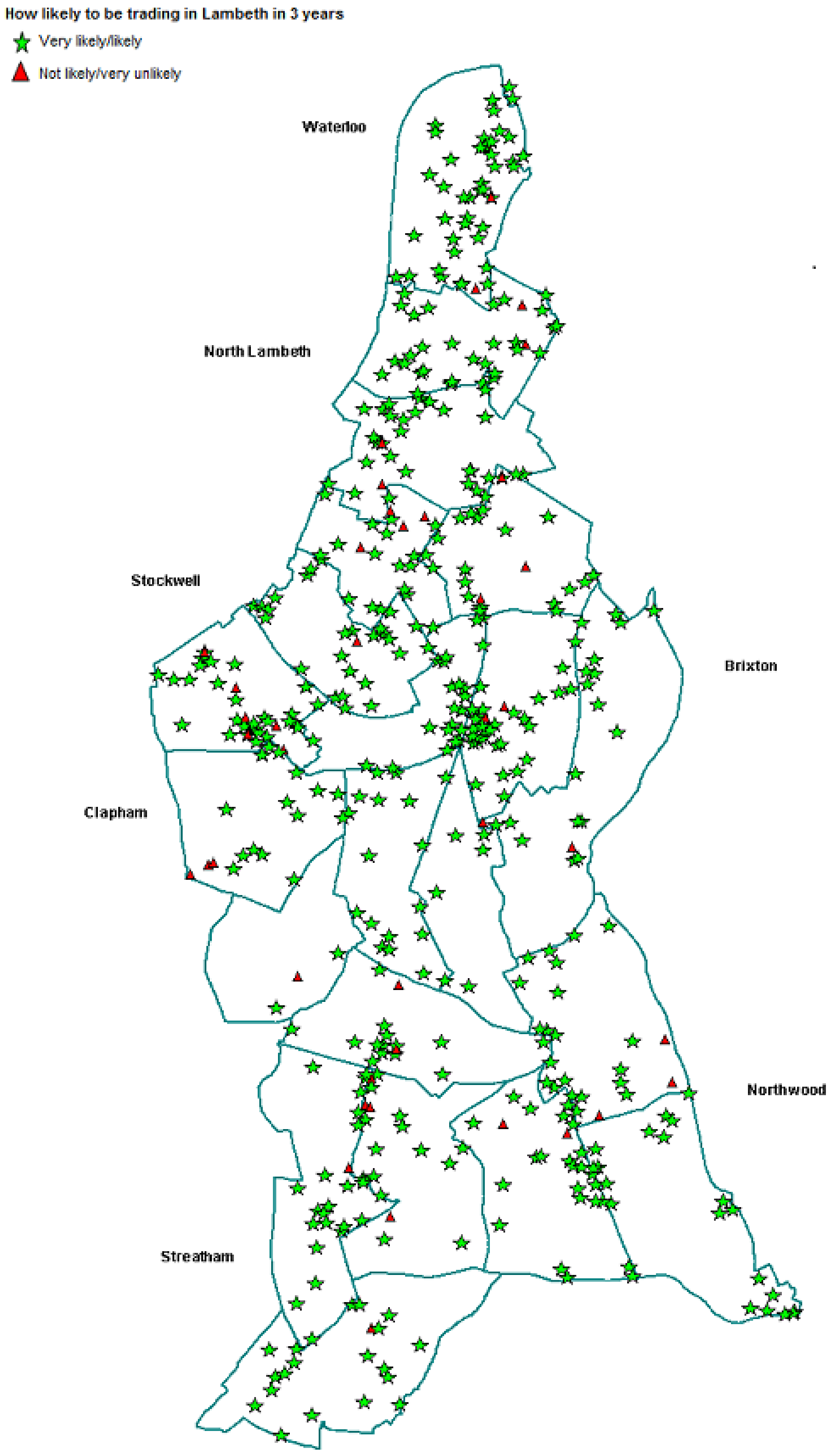
Chart 8 – How likely are you to be trading in Lambeth in 3 years time?



Weighted base:726

The map overleaf details the locations of businesses likely and unlikely to be trading in Lambeth in 3 years time.

Map 2: How likely are you to be trading in Lambeth in 3 years time?



In considering why they do not expect to be trading in Lambeth in 3 years time, highest proportions of businesses refer to relocating or moving to a different area and the business closing down/retirement.

Figure 12 – Why are you unlikely to be trading in Lambeth in 3 years time?

	%
Relocation/moving to a different area	26%
Retirement/the business will be closing down	16%
Landlord having asked them to move due to renovation	8%
Business is declining	6%
Business rent increases	5%
Don't know	5%
Current building being knocked down	4%
Business rate increases/rent increases	3%
Business rate increases	3%
Council issues/lack of support	3%
Needing more space	3%
House prices	2%
Parking	2%
Council issues	2%
The number of similar businesses opening in the area/ competition	2%
Dependent on funding	1%
Uncertainty over premises	1%
Other	15%

Weighted base:110 (Businesses not likely or very unlikely to be trading in Lambeth in 3 years time)

Highest proportions of those looking to relocate or move to a different area are currently based in North Lambeth and Streatham, with 68% of businesses suggesting this being in the 'Information, Communication, Property, Finance and Insurance' sectors. As shown in the table above, some 8% refer to their landlord having asked them to move due to renovation and 4% to their current business accommodation being knocked down.

'Unsure what is going to happen to the current premises so may have to look for new premises soon.'

(Micro business in the 'Professional, Scientific and Technical' sector, Norwood)

'Previous land owner sold the land and wants to develop and we are worried that we are going to be kicked out of the area and that would leave us without a place to go.'

(Micro business in the 'Business administration & support services' sector, Clapham)

'Our current premises in Brixton are being turned into a residential project; we have got to find new premises in Brixton.'

(Micro business in the 'Professional, Scientific and Technical' sector, Clapham)

'Landlord has asked us to leave due to renovation.'

(Small business in the 'Health' sector, North Lambeth)

'Rumours that people are coming to take the shops away and refurbishing but I'm not sure. Hopefully I will be still trading because I've been here for 30 years.'

(Micro business in the 'Retail' sector, Brixton)

'Too many large supermarkets opening up in the area, unsure if we will be able to compete.'

(Micro business in the 'Retail' sector, Waterloo)

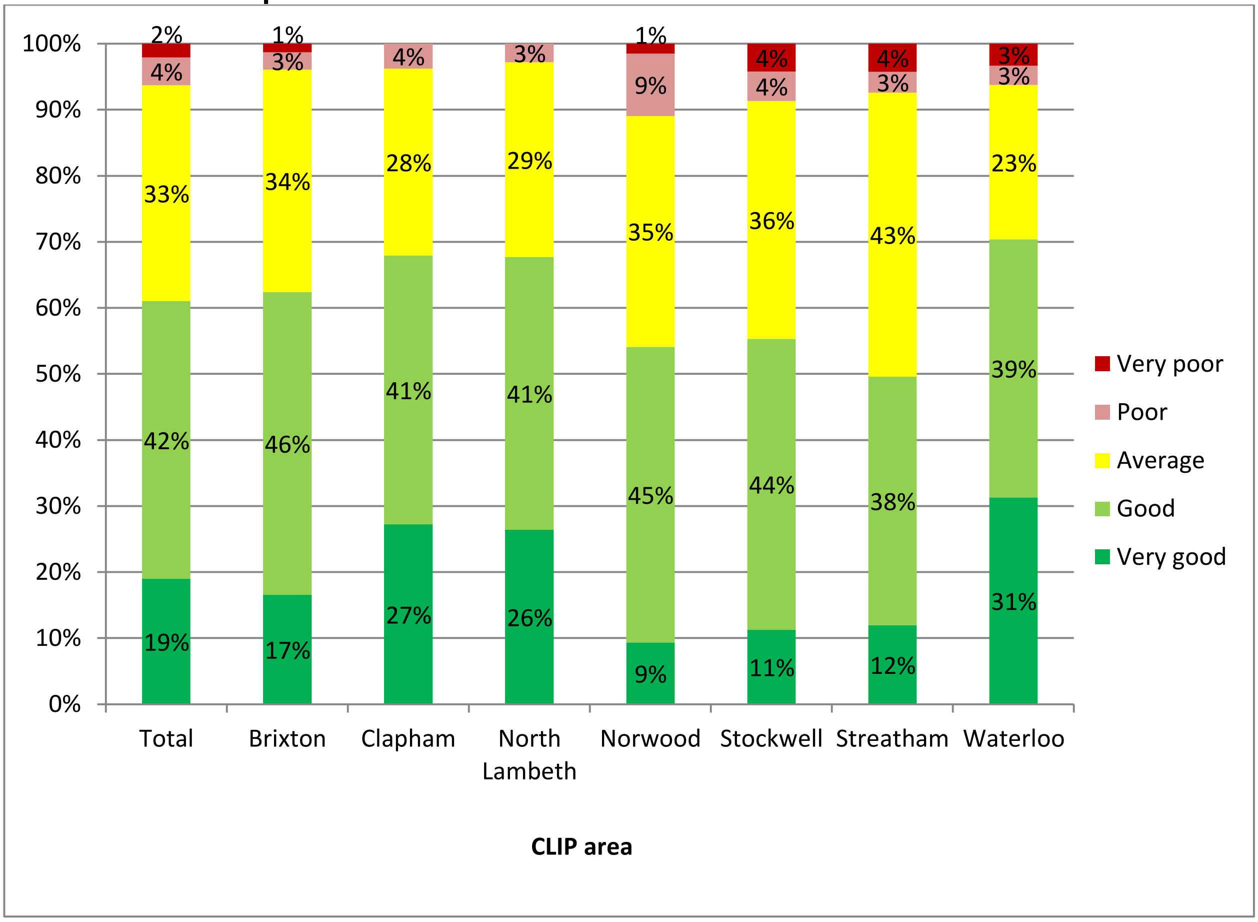
3.2 Business Economy and Aspirations

- ***61% of businesses rate Lambeth as a 'good' or 'very good' place to do business with only 6% rating Lambeth as 'poor' or 'very poor', and one in three as average. This shows an improvement on findings reported in the 2011 Lambeth Business Survey where 38% rated Lambeth as 'good' or 'very good' and 22% as 'poor' or 'very poor'.***
- ***Being near to good transport links (30%), being a generally 'good location' (29%) and being close to central London (21%) are considered strengths of Lambeth as a business location.***
- ***Parking is referred to by one in five businesses surveyed as a limitation to Lambeth as a business location.***
- ***One in four businesses located within BID areas agree or strongly agree that being located in the BID area has positively benefitted their business.***
- ***Six out of ten businesses have objectives to grow over the next three years. 14% expect to grow to become a much larger businesses, with the highest proportion (47%) expecting to grow slowly and gradually get bigger. Overall, only 3% expect to reduce the scale of their operations over this period with one in three looking to maintain the business roughly as it is. These figures are similar to those reported in the 2011 Lambeth Business Survey where 60% expected to see growth and 5% to reduce the scale of their operations.***

3.2.1 Views on Lambeth as a Business Location

In discussing how they rate Lambeth as a place to do business, some 61% of businesses rate the Lambeth area as a 'good' or 'very good' place to do business.

Chart 9 – On a scale of 1 to 5 with 1 being very good and 5 being very poor, how do you rate Lambeth as a place to do business?



Weighted base:726 (all respondents)

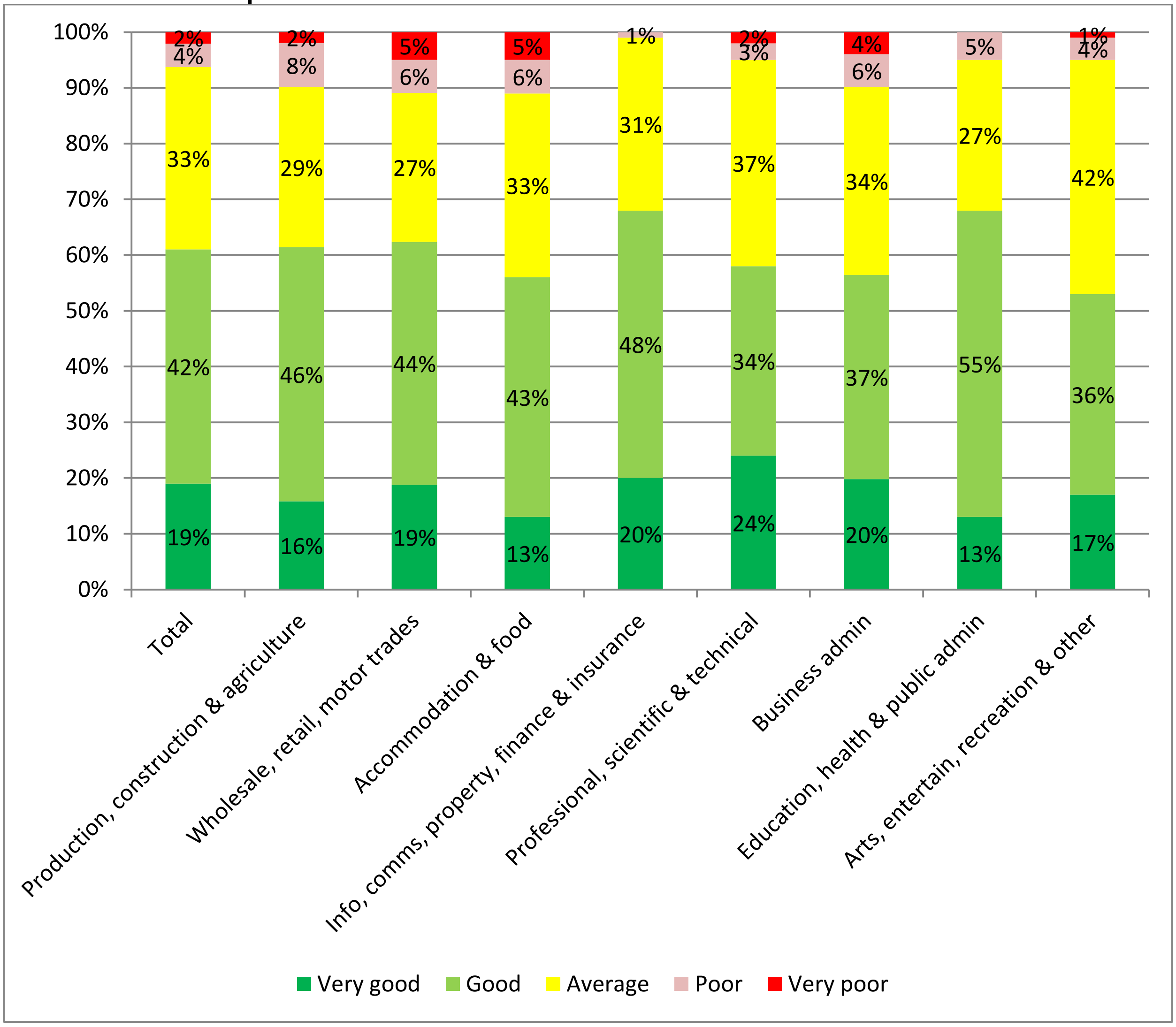
As shown, only 6% overall rate Lambeth as 'poor' or 'very poor' as a place to do business, with 1 in 3 rating it as average.

This shows an improvement on the position in 2011 where 38% rated Lambeth as a 'good' or 'very good' place to do business, with 22% rating it as 'poor' or 'very poor'.

Businesses in Waterloo are more positive about their business location with those in Streatham significantly less frequently rating the area as 'good' as a place to do business.

Businesses in the 'Education, Health and Public Administration' sector and 'Information, Communication, Property, Finance and Insurance' businesses are most positive about the area as a business location (68% of each of these sectors rating the area as good or very good).

Chart 10 – On a scale of 1 to 5 with 1 being very good and 5 being very poor, how do you rate Lambeth as a place to do business?



Weighted base:726

As shown, those in the 'Wholesale, Retail and Motor Trades' and 'Accommodation and Food' sectors more frequently rate the area as poor or very poor (11%).

Overall, registered businesses are slightly more positive in rating Lambeth as a business location than sole traders with 63% and 53% respectively rating the area as good (very good or good). Only 6% of registered businesses rate the area as poor (poor or very poor) compared with 9% of sole traders suggesting this.

Larger businesses are also more positive overall about the area as a place to do business as shown in the chart below.

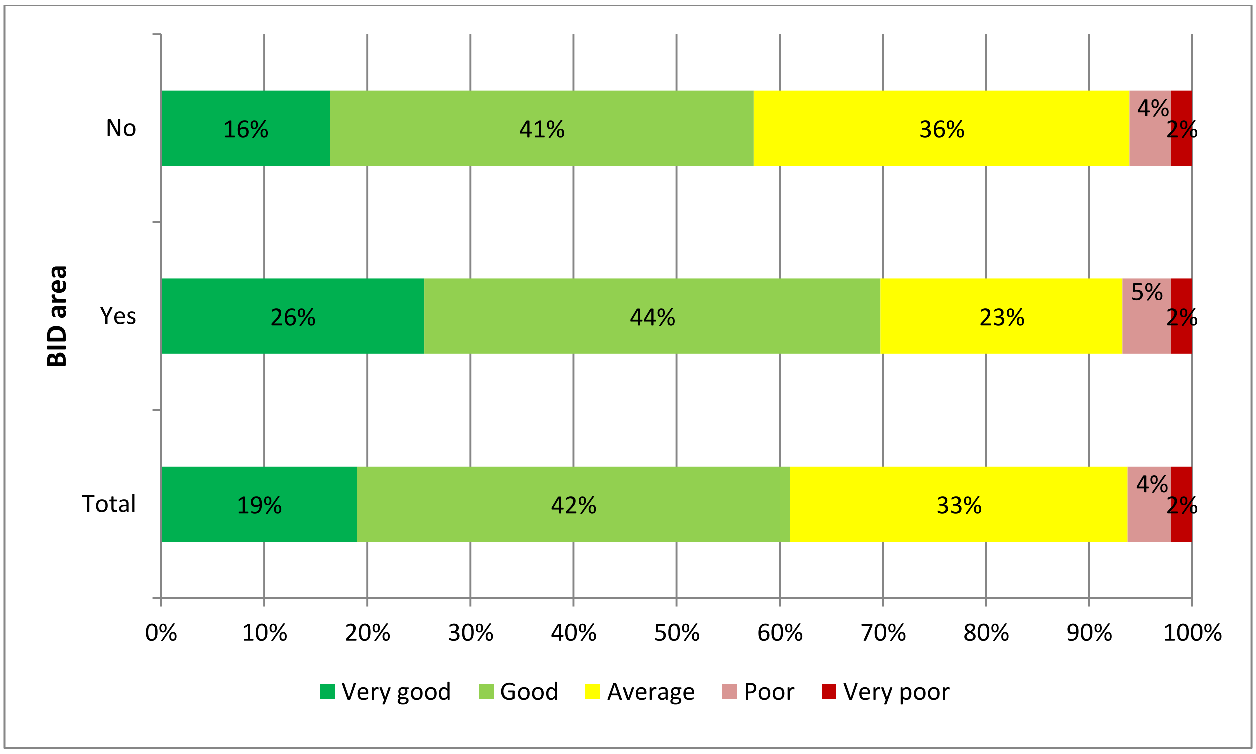
Chart 11 – On a scale of 1 to 5 with 1 being very good and 5 being very poor, how do you rate Lambeth as a place to do business?

Weighted base:726 (all respondents)

Some 65% of businesses majority owned by those from White and Black ethnic backgrounds rate the area as a good (very good & good) location to do business (65% of each) compared with 55% of majority Asian owned businesses suggesting this.

Businesses who have started trading in Lambeth within the last 2 years were most positive about the area as a place to do business with 67% of these businesses rating the area as very good or good (compared with 61% of the sample overall). Businesses located in BID areas also more frequently referred to Lambeth being a good or very good location as a place to do business.

Chart 12 – On a scale of 1 to 5 with 1 being very good and 5 being very poor, how do you rate Lambeth as a place to do business?

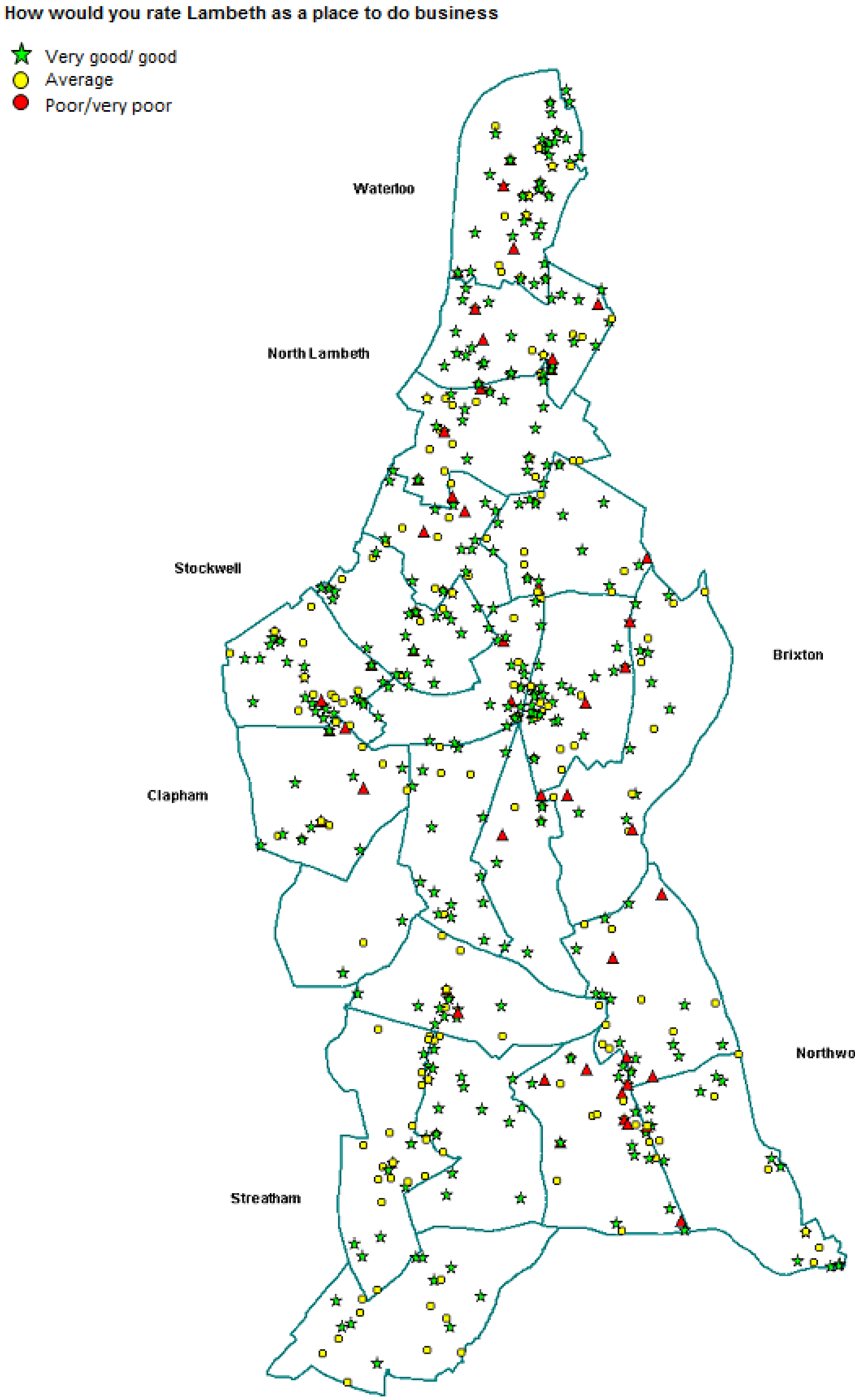


Weighted base:726

As shown, more than two thirds (70%) of businesses located in BID areas rate the area as good (or very good) compared with 57% of those located in non BID areas.

The following map highlights the postcodes of businesses rating the area as good, average and poor.

Map 3: How do you rate Lambeth as a place to do business?



In considering the strengths of Lambeth as a business location, highest proportions of businesses refer to it being near to good transport links (30%), being a generally 'good location' (29%) and being close to central London (21%).

Figure 13 – What are the strengths of Lambeth as a business location?

	%
Near to good transport links	30%
It's a good location	29%
Close to Central London	21%
Good customer base	11%
Diverse Area/multicultural	7%
Community spirit/lively community	5%
Close to amenities	4%
Inexpensive space/reasonable prices	2%
Council approachable/supportive/communication good	2%
Business not dependent on location	2%
Know the area/live locally	2%
Business rates/rents a positive	2%
No comment	2%
Large population/residential area	1%
Area rundown/going downhill	1%
Area is improving	1%
Rise in new/younger customers	1%
Maintaining business growth in the area	<1%
New businesses opening bringing new customers	<1%
None	6%
Other	4%
Don't know	3%

Weighted base:726 (all respondents)

As shown above, only 6% of businesses suggest they felt there are no strengths to Lambeth as a business location.

Being near to good transport links, it being a good location and being close to central London are more frequently cited by registered businesses, whilst higher proportions of sole traders (17%) cite the good customer base to be a strength of Lambeth as a business location (compared with 11% referring to this overall).

Lambeth being a diverse area/multicultural is most frequently referred to as a strength of Lambeth as a business location by businesses majority owned by those from Black ethnic backgrounds (17%), those located in the Brixton CLIP area (13%) and in the 'Retail' sector (11%).

'Our business location in Lambeth is in a very lively area and we have our regular customer base to support our business'

(Micro business in the 'Retail' sector, Clapham)

'We are located in Streatham which has a varied diverse community'

(Micro business in the 'Professional, Scientific and Technical' sector, Streatham)

'Exciting and upcoming area with a diverse clientele'

(Micro business in the 'Retail' sector, Brixton)

Being near to good transport links is also most important for businesses in the 'Health' and 'Education' sectors, along with those in Waterloo and Clapham.

'Central to London. No parking restrictions on the common where situated. Transport is very good.'

(Micro business in the 'Health' sector, Streatham)

'Access to Waterloo station and transport network is excellent'

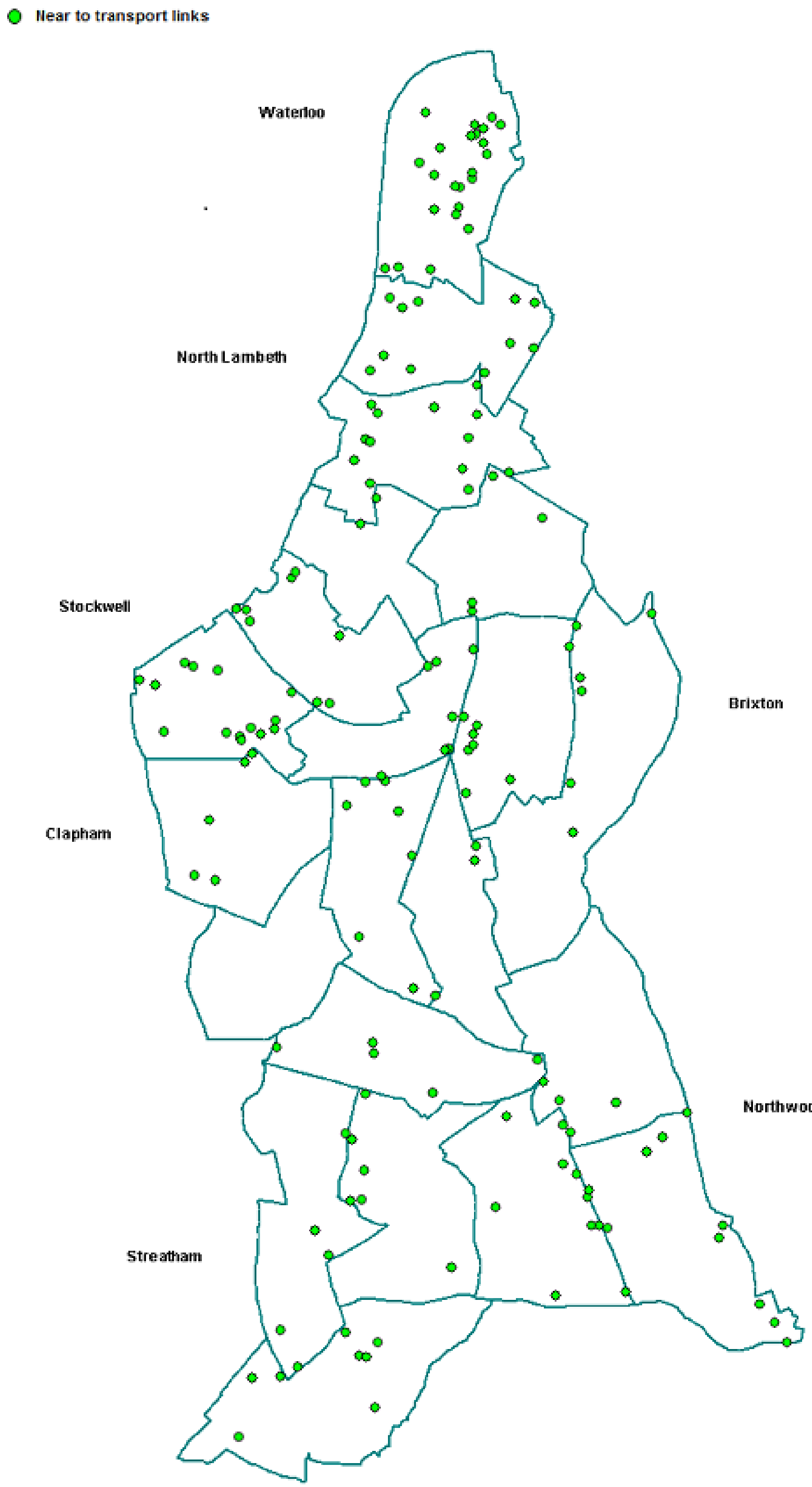
(Micro business in the 'Professional, Scientific and Technical' sector, Waterloo)

'Transport is superb – young professionals coming into the area to live – only 5 minutes to Waterloo, Clapham etc – great transport network'

(Micro business in the 'Arts, Entertainment and Recreation' sector, North Lambeth)

The map overleaf highlights the location of businesses referring to being near to good transport links as a strength of Lambeth as a business location.

Map 4: Location of businesses referring to 'near to transport links' as a strength of Lambeth as a place to do business



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Lambeth being a generally ‘good location’ is particularly significant in Waterloo, with 51% of businesses in the CLIP area spontaneously suggesting this as a strength of Lambeth as a business location. Those referring to this as a strength include 42% of those in the ‘Food and Accommodation’ sector and 47% of medium/large businesses.

‘Where we are located is probably the best location in the Lambeth area as it is in walking distance to central London – access to all facilities’

(Micro business in the ‘Professional, Scientific and Technical’ sector, Waterloo)

‘Proximity to central London, transport connections are excellent, not in congestion zone, reasonable rent amounts’

(Micro business in the ‘Wholesale’ sector, Brixton)

Interestingly, businesses located within BID areas also more frequently discuss Lambeth as a good location (37% compared with 25% among those located in none BID areas).

‘A high level of tourism, excellent foot fall, good transport link, a multicultural society and the development of the south bank have made this a good area.’

(Small business in the ‘Business administration & support services’ sector, Waterloo BID AREA)

‘Cosmopolitan nature, outside congestion charge zone, very good transport links, very good shops in the area.’

(Small business in the ‘Arts, entertainment, recreation & other services’ sector, North Lambeth BID AREA)

‘Very central as a location and good transport links but whilst not being as expensive as other areas’

(Small business in the ‘Professional, Scientific and Technical’ sector, Waterloo BID AREA)

‘Growing as a place with all the larger businesses coming into the area and we’re taking advantage of that’

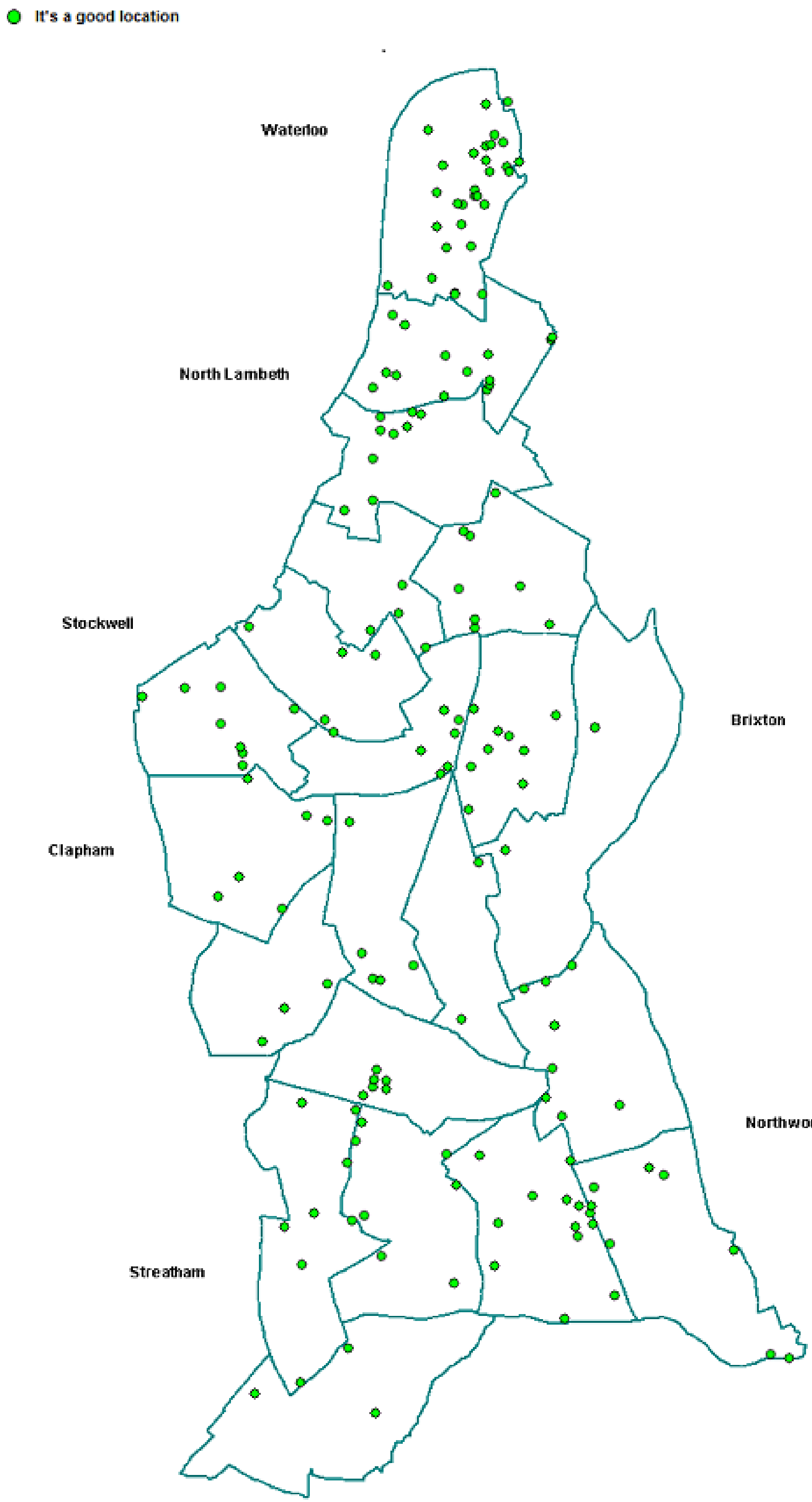
(Small business in the ‘Accommodation and Food’ sector, Waterloo BID AREA)

‘Good location’

(Micro business in the ‘Accommodation and Food’ sector, Streatham BID AREA)

The map overleaf highlights the location of businesses referring to Lambeth being a good location as a strength of Lambeth as a business location.

Map 5: Location of businesses referring to 'it's a good location' as a strength of Lambeth as a place to do business



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Survey respondents were also asked to give spontaneous responses to whether there are any limitations to Lambeth as a business location. On a positive note, just less than one third (31%) suggest there are no limitations to Lambeth as a business location.

Figure 14 – And are there any limitations to Lambeth as a business location?

	%
None	31%
Lack of parking facilities	20%
Congestion/traffic	5%
Business rates	5%
Lack of office space/difficult to find commercial premises	4%
Crime/anti-social behaviour	3%
Need more shops/amenities	3%
Competition - too many similar businesses in the area	3%
Waste collections/recycling	3%
Area run down	3%
The Council/Bureaucracy	3%
Rents too high	3%
Litter	2%
Reputation of the area	2%
Distance from tube line/station	2%
Quiet location/not many people	1%
Poor security/lack of policing	1%
Accessibility for deliveries	1%
Lack of support for small businesses	1%
Lack of business networks	1%
Business premises becoming residential	1%
Property prices/housing costs too high	1%
Transport delays/closures	1%
Need cycle routes/improve cycling provision	1%
Lack of space for business meetings	<1%
Low income area	<1%
Other	10%
No comment	6%

Weighted base:726 (all respondents)

As shown, parking is spontaneously referred to by one in five businesses, with this most frequently referred to by significantly higher proportions of businesses in the 'Retail' sector (32%), sole-traders (28%) and those rating Lambeth Council as either "not very" or "not at all" business friendly (32%).

'Hard to get people in shopping because of parking, people prefer to go to big supermarkets just because there's parking there and they don't worry about their car getting a ticket. I think this is driving local businesses away because they have no where to park.'

(Micro business in the 'Retail' sector, Brixton)

'Lack of parking is the issue here, I've lost a lot of business, people are afraid to stop now since the red route was introduced. Small businesses are finding it hard. Tesco has the monopoly, they offer free parking. They should introduce free parking on the street to encourage people to return.'

(Micro business in the 'Arts, entertainment, recreation & other services' sector, North Lambeth)

'No parking. Issue lots of tickets in street. Deliveries have trouble delivering.'

(Micro business in the 'Retail' sector, Norwood)

'Parking is a huge problem; we have no parking facilities outside our store at all.'

(Small business in the 'Retail' sector, Clapham)

Business rates also appear to be of greater concern for those in the 'Accommodation and Food' (10%) and 'Retail' (8%) sectors.

A lack of office space and it being difficult to find commercial premises is most frequently discussed in the North Lambeth CLIP area (8%) and by those in the 'Information, Communication, Property, Finance and Insurance' sectors (9%).

Some 29% of businesses taking part in the survey are located within BID (Business Improvement District) areas. The table below details the number of businesses located in each of the BID areas. *NB the table contains un-weighted numbers.*

Figure 15 – Business Improvement District Area

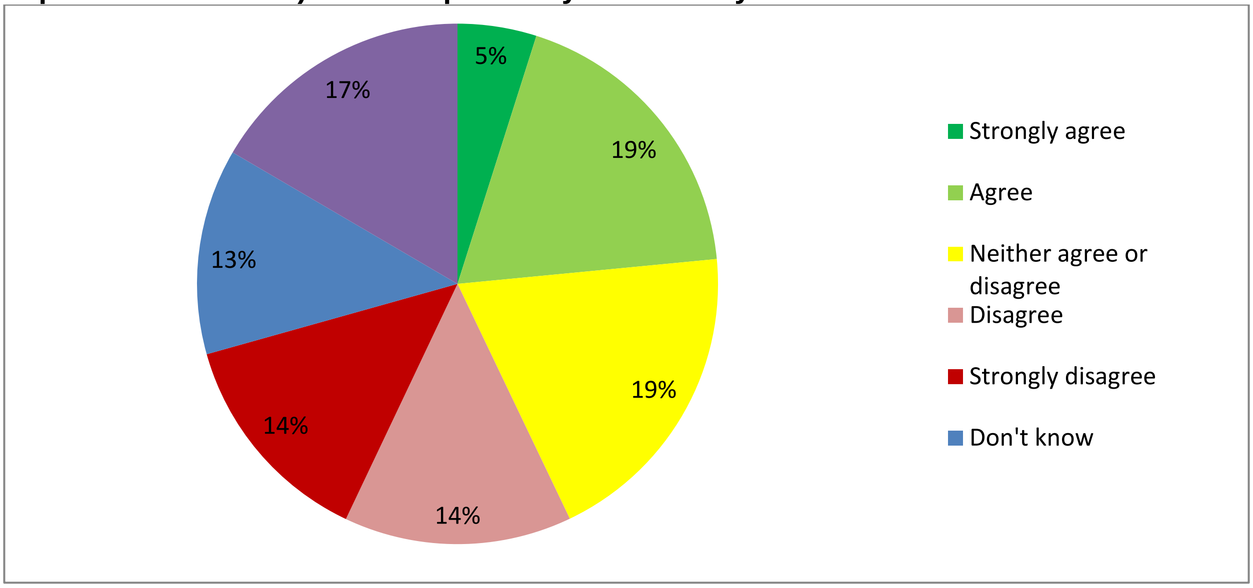
Business Improvement District (BID)	Number of businesses surveyed
Brixton	65
Clapham	43
South Bank	25
Streatham	15
Vauxhall	28
Waterloo	41

Un-weighted base count:217 (all respondents)

Businesses located within BID areas were asked to what extent they agreed that being located in a BID area had positively benefitted their business.

As shown in the chart overleaf approximately one in four (24%) agree or strongly agree that being located in the BID area has positively benefitted their business.

Chart 13 – To what extent do you agree that being located within this BID (Business Improvement District) area has positively benefitted your business?



Weighted base:208 (Businesses located within BID areas)

Some 28% disagree that being located within a BID area has benefitted their business.

As also shown in the previous chart, some 17% of businesses located within BID areas are not aware of their local BID.

3.2.2 Location of Customer Base and suppliers

In considering the geographical split of their <u>sales</u> of good and services, on average, businesses estimate 37% of their sales to be to customers based in Lambeth.

Figure 16 – Over the last 12 months, what percentage of your sales of goods and services was to customers based in…

	Lambeth Business Survey 2015			London Business Survey 2014[5]
	Minimum	Maximum	Average	
Lambeth	0	100	37%	66%
Elsewhere in Greater London	0	100	39%	
Elsewhere in the UK (outside Greater London)	0	100	14%	16%
Europe (excluding the UK)	0	100	4%	8%
Rest of the World	0	100	5%	6%

*Weighted base:691 (all respondents excluding don't knows) *in the London Business Survey 2014 these were combined to one category 'Greater London'.*

[5] www.london.gov.uk/sites/default/files/london-business-survey-exports.pdf

The average proportion of sales of good and services being to customers based in Lambeth is significantly higher in the “retail’ sector at 69%. In the “Business Administration’ sector, higher average proportions are to customers elsewhere in London (50%) and elsewhere in the UK (19%).

As may be expected, medium/large enterprises suggest higher proportions of their sales to be to customers in Europe and the rest of the world than those recorded overall. The average proportion of sales to customers based in Lambeth is also higher for sole traders (51%) compared with 30% among registered companies.

Majority Asian and Black owned businesses also have a stronger local customer base with 65% and 53% of their customers respectively being in Lambeth (compared with 27% among businesses majority owned by those from White ethnic backgrounds).

The table above also highlights comparisons with data recorded in the London Business Survey 2014 where businesses were asked a similar question. As shown, it appears slightly higher proportions of sales from businesses in Lambeth are to those within the borough/Greater London area, with average sales to customers elsewhere in the UK, Europe and the rest of the world from businesses taking part in the London Business Survey 2014 being slightly higher.

In considering the geographical split of their purchases of good and services, on average, businesses estimate 26% of their purchases to be from suppliers based in Lambeth, with the highest proportion (36%) being from suppliers elsewhere in Greater London.

Figure 17 – Over the last 12 months, what percentage of your purchases of goods and services came from suppliers based in…

<table>
<tr><th></th><th colspan="3">Lambeth Business Survey 2015</th><th>London Business Survey 2014[6]</th></tr>
<tr><td></td><td>Minimum</td><td>Maximum</td><td>Average</td><td></td></tr>
<tr><td>Lambeth</td><td>0</td><td>100</td><td>26%</td><td rowspan="2">60%</td></tr>
<tr><td>Elsewhere in Greater London</td><td>0</td><td>100</td><td>36%</td></tr>
<tr><td>Elsewhere in the UK (outside Greater London)</td><td>0</td><td>100</td><td>28%</td><td>23%</td></tr>
<tr><td>Europe (excluding the UK)</td><td>0</td><td>100</td><td>5%</td><td>6%</td></tr>
<tr><td>Rest of the World</td><td>0</td><td>100</td><td>3%</td><td>6%</td></tr>
</table>

*Weighted base:691 (all respondents excluding don’t knows) *in the London Business Survey 2014 these were combined to one category ‘Greater London’.*

[6] www.london.gov.uk/sites/default/files/london-business-survey-exports.pdf

Businesses in Norwood, Brixton and Waterloo report higher proportions of their purchases on goods and services to be from suppliers based in Lambeth (31%, 28% and 28% respectively).

An average of 32% of goods and services purchased by sole traders are from suppliers based in Lambeth with this comparing to 23% for registered companies.

Highest proportions of businesses majority owned by those from Black ethnic backgrounds purchase supplies within Lambeth (37% of purchases on average from suppliers based in Lambeth), whilst Asian owned businesses more frequently purchase supplies from elsewhere in Greater London (47% on average of purchases made by Asian businesses are from suppliers based elsewhere in Greater London).

As shown in the table above, it appears slightly higher proportions of purchases for businesses in Lambeth are from suppliers within the borough/Greater London area and the UK, with average purchases from suppliers based in Europe and the rest of the world being slightly lower compared with that recorded by businesses taking part in the London Business Survey 2014.

3.2.3 Challenges Facing Businesses

All businesses were asked which of a prompted list of challenges they felt affected their business aspirations.

As shown in the table overleaf, some 11% are unsure or felt none of the challenges affected their business aspirations. Challenges discussed most frequently include parking for customers, commercial rents and business rates, market sector competition, crime and anti-social behaviour and deliveries/unloading.

Figure 18 – Challenges facing businesses

	Challenges %	Top 3 challenges %
Parking for customers	48%	41%
Commercial rents/ business rates	37%	30%
Market sector/competition	32%	23%
Crime/Anti-social behaviour	27%	19%
Deliveries /unloading	25%	14%
Government Regulations	23%	12%
Housing property prices	22%	11%
Broadband/digital infrastructure	20%	12%
Demand for products and/ or services	20%	9%
Staff costs	20%	8%
Premises/availability of premises	20%	13%
Access to finance	16%	11%
Availability of skills	16%	8%
Quality of staff	15%	8%
Transport	14%	8%
Parking at customer's premises	1%	1%
Planning policy/licencing	1%	0%
Dirty streets	<1%	0%
Waste collection/recycling	<1%	<1%
Don't know/ None	11%	1%
Other	6%	5%

Weighted base: 726/649 (all respondents/all respondents excluding those suggesting no challenges)

Other challenges faced by at least 20% of businesses include Government regulations, housing property prices, premises/availability of premises, broadband/digital infrastructure, staff costs and demand for products/services.

As shown in the right hand column in the table above, businesses who faced challenges were also asked which of the challenges that they felt affected their business aspirations were the three biggest challenges. Challenges most frequently referred to as being in the top three again include parking, commercial rents/business rates, market sector/ competition and crime/ anti-social behaviour.

Whilst access to finance is only referred to as a top 3 challenge by 11% of business overall, this is discussed by 26% of not for profit/social enterprises and 16% of sole traders compared with 9% of registered companies and 7% of partnerships.

Parking

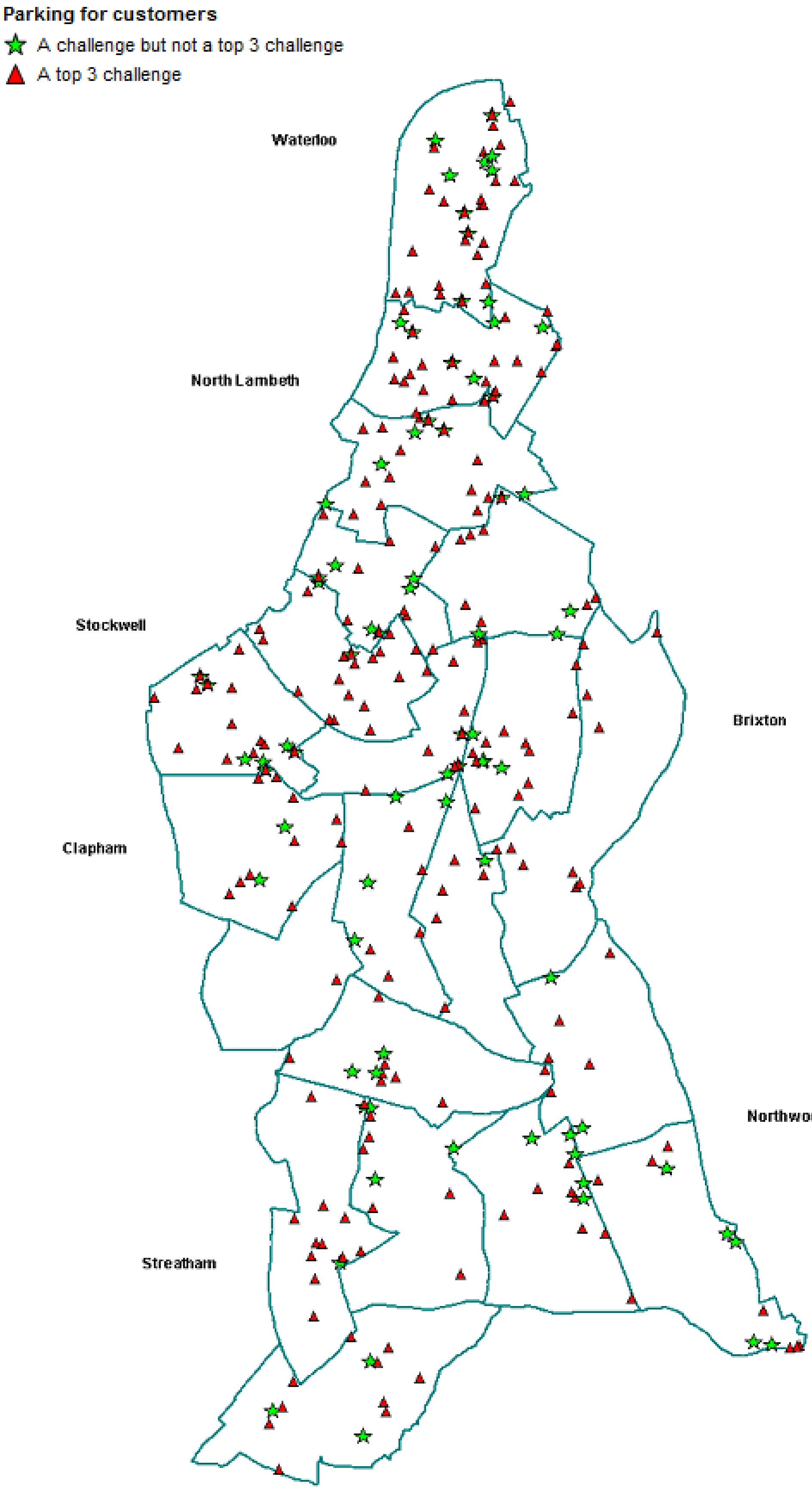
Parking is referred to as a challenge by nearly half of all businesses (48%) and by significantly higher proportions of businesses in the "Accommodation and Food" (70%) and 'Retail' (63%) sectors, in Brixton (59%) and those rating Lambeth Council as either "not very" or "not at all" business friendly (62%).

Parking is referred to as being among the three biggest challenges for 41% of businesses. This is slightly lower than the proportion referring to this as a top 3 challenge in 2011 (58%). Whilst this is lower, care needs to be taken in comparisons with the 'parking' category being split in the 2015 survey with a separate code added for 'deliveries/unloading' (which was also referred to as a top 3 challenge by 14% [see table above]). NB. There is also some overlap in the 2015 data where businesses refer to both parking and deliveries/unloading within their top 3 challenges. Parking is significantly most frequently referred to as a top 3 challenge by businesses in Brixton (58%) and by those in the 'Wholesale, Retail and Motor Trades' (61%), 'Education, Health and Public Administration' (56%) and 'Accommodation and Food' (55%) sectors. This is again inline with findings from the 2011 Lambeth Business Survey where businesses in Brixton and those in the 'Retail' sector were those most frequently discussing parking as a key challenge.

More than half (54%) of businesses majority owned by those from Asian ethnic backgrounds suggest parking to be a top 3 challenge, with this the case for 50% of those majority owned by Black and 39% White ethnic backgrounds. There is also a direct link here to type and location of businesses majority owned by those from Asian and Black ethnic backgrounds.

The map overleaf shows the location of businesses referring to parking as a challenge/top 3 challenge faced by their business. (Blue circles indicate where a challenge is referred to as just a challenge, with red circles indicating where the challenge is rated as a top 3 challenge).

Map 6: Location of businesses referring to 'Parking for customers' as a challenge/top 3 challenge



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Commercial rents/business rates

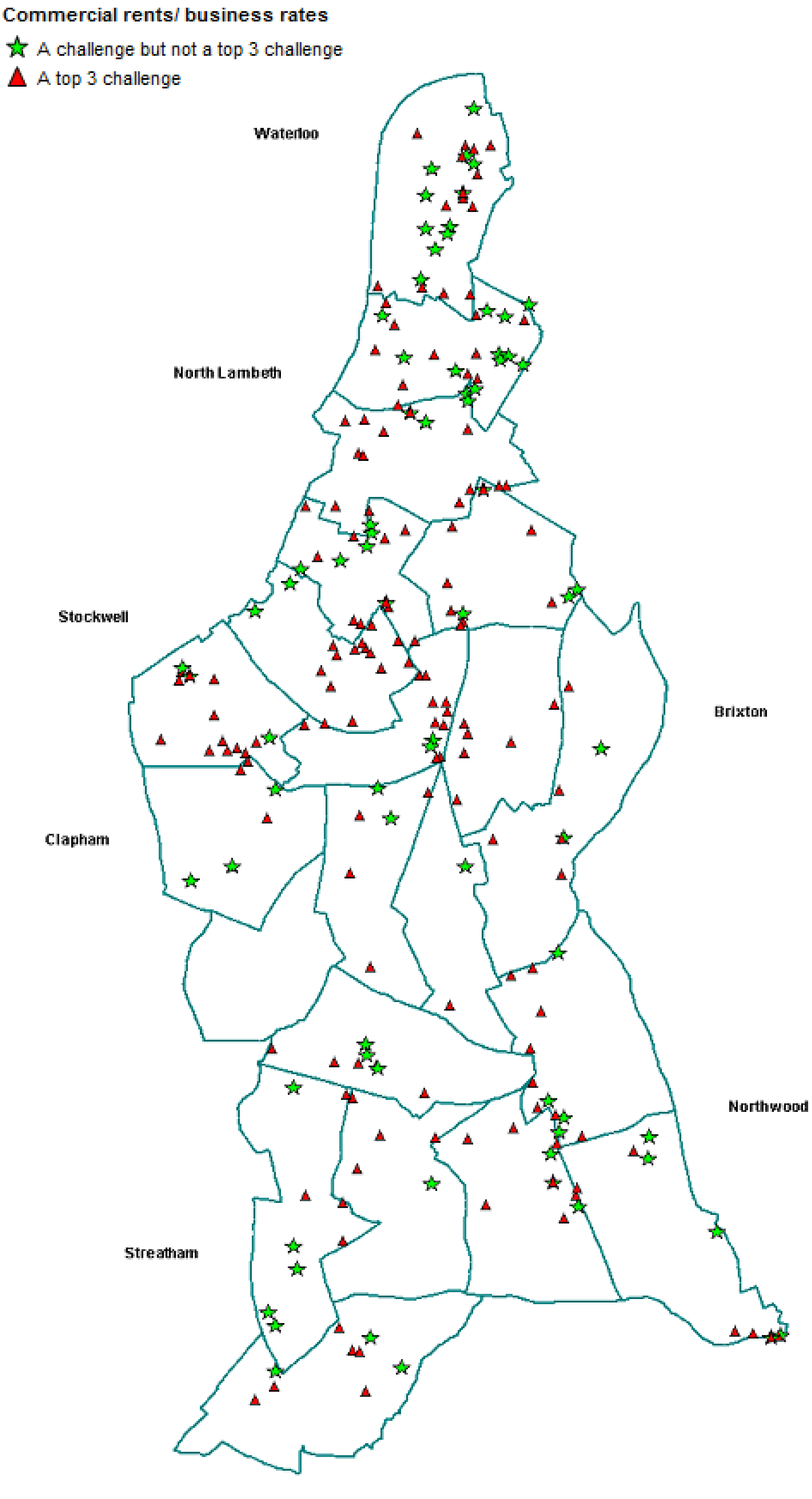
Commercial rents and business rates are more frequently discussed as a top 3 challenge by 30% overall with this most frequently discussed in Clapham (36%) and Stockwell (36%). This is also the case among businesses in the 'Retail' sector (47%).

In considering the type of business, commercial rents and business rates are seen as a top 3 challenge by highest proportions of sole traders (34%).

Some 44% of businesses majority owned by those from Asian backgrounds select commercial rents and business rates as a top 3 challenge compared with 33% of businesses majority owned by those from White and 24% from Black ethnic backgrounds.

The map overleaf shows the location of businesses referring to commercial rents/business rates as a challenge/top 3 challenge faced by their business.

Map 7: Location of businesses referring to 'Commercial rents/business rates' as a challenge/top 3 challenge



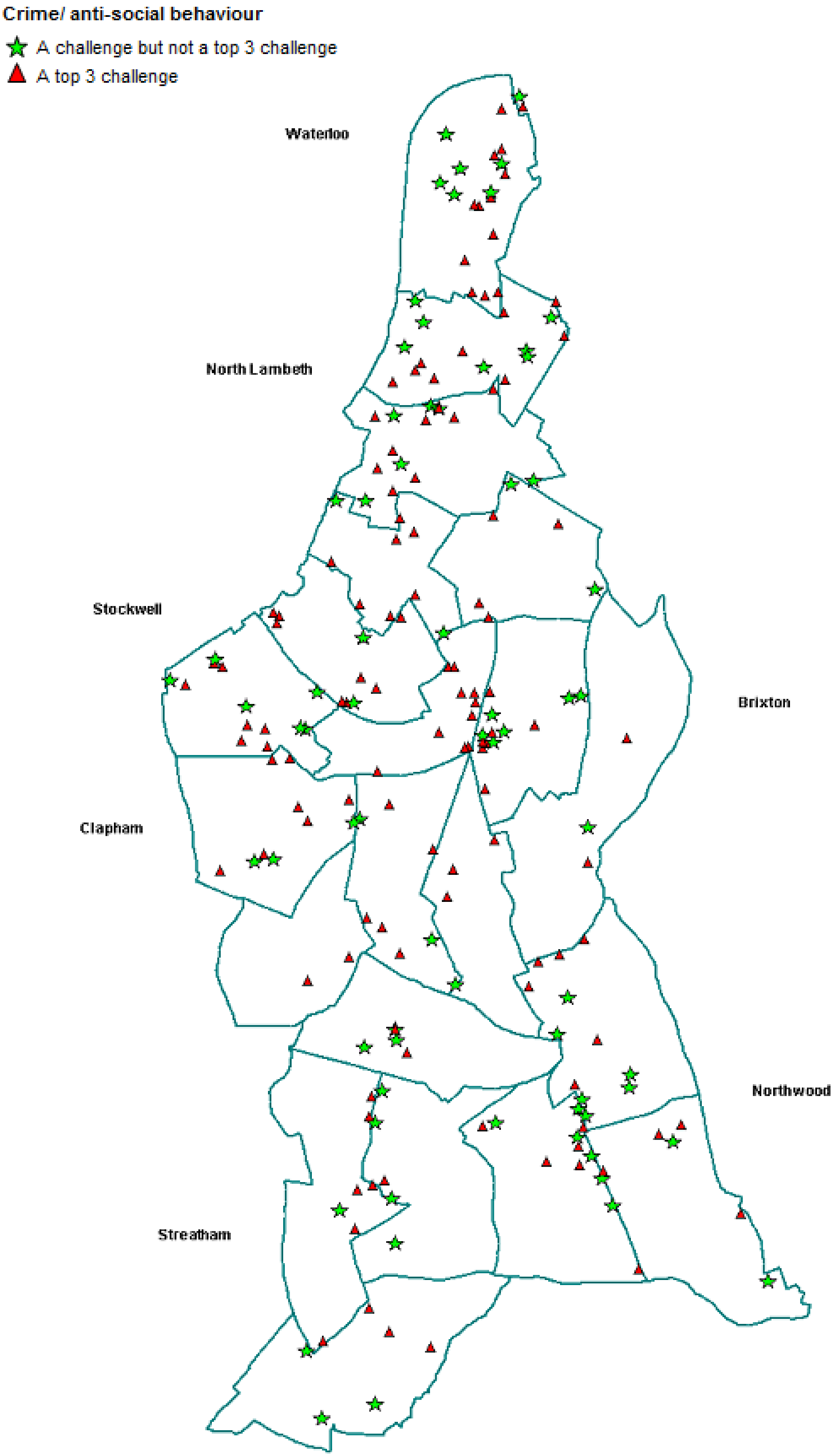
Crime/anti-social behaviour

Crime and anti-social behaviour is a top 3 challenge for just under one in five businesses (19%). This is most frequently the case among businesses located in the Stockwell (24%), Brixton (21%) and Norwood (21%) CLIP areas.

Businesses in the 'Retail' and 'Accommodation and Food' sectors also more frequently refer to crime and anti-social behaviour as a top 3 challenge (30% and 29% respectively), along with businesses majority owned by those from Asian backgrounds (where 29% refer to this as a top 3 challenge compared with 18% of businesses majority owned by those from White and 16% from Black ethnic backgrounds).

The map overleaf shows the location of businesses referring to crime/anti-social behaviour as a challenge/top 3 challenge faced by their business.

Map 8: Location of businesses referring 'Crime/anti-social behaviour' as a challenge/top 3 challenge



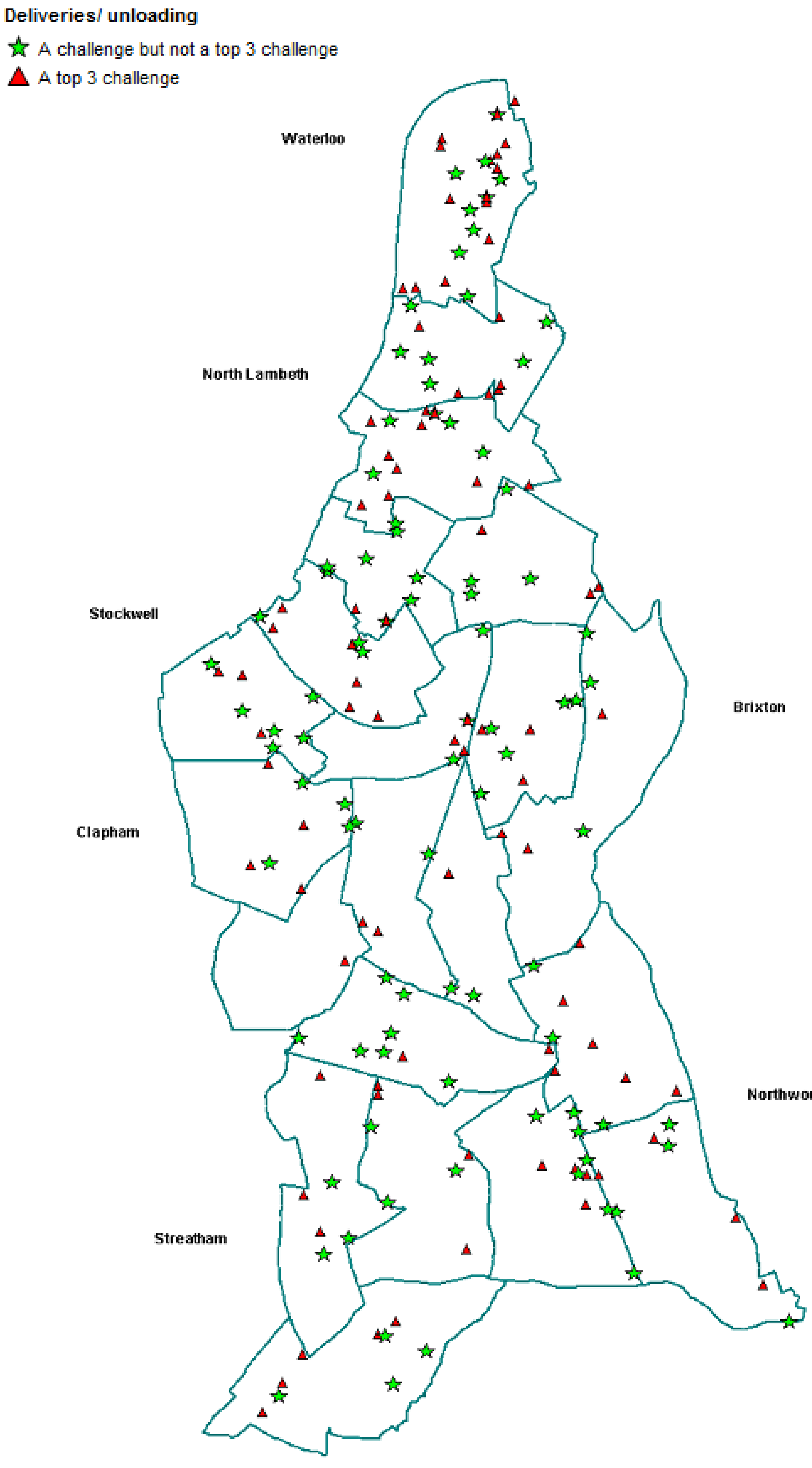
Deliveries/Unloading

Some 14% of businesses overall rate deliveries/unloading as a top 3 challenge for their business. This ranges from 7% of businesses in the North Lambeth CLIP area to 21% in Waterloo and 22% in Norwood.

Again, deliveries/unloading is more frequently rated as a top 3 challenge by businesses in the ‘Retail’ (24%) and ‘Accommodation and Food’ (22%) sectors but is also the case for 21% of businesses in the ‘Production, Construction & Agriculture’ sector.

The map overleaf shows the location of businesses referring to deliveries/unloading as a challenge/top 3 challenge faced by their business.

Map 9: Location of businesses referring to 'Deliveries/unloading' as a challenge/top 3 challenge



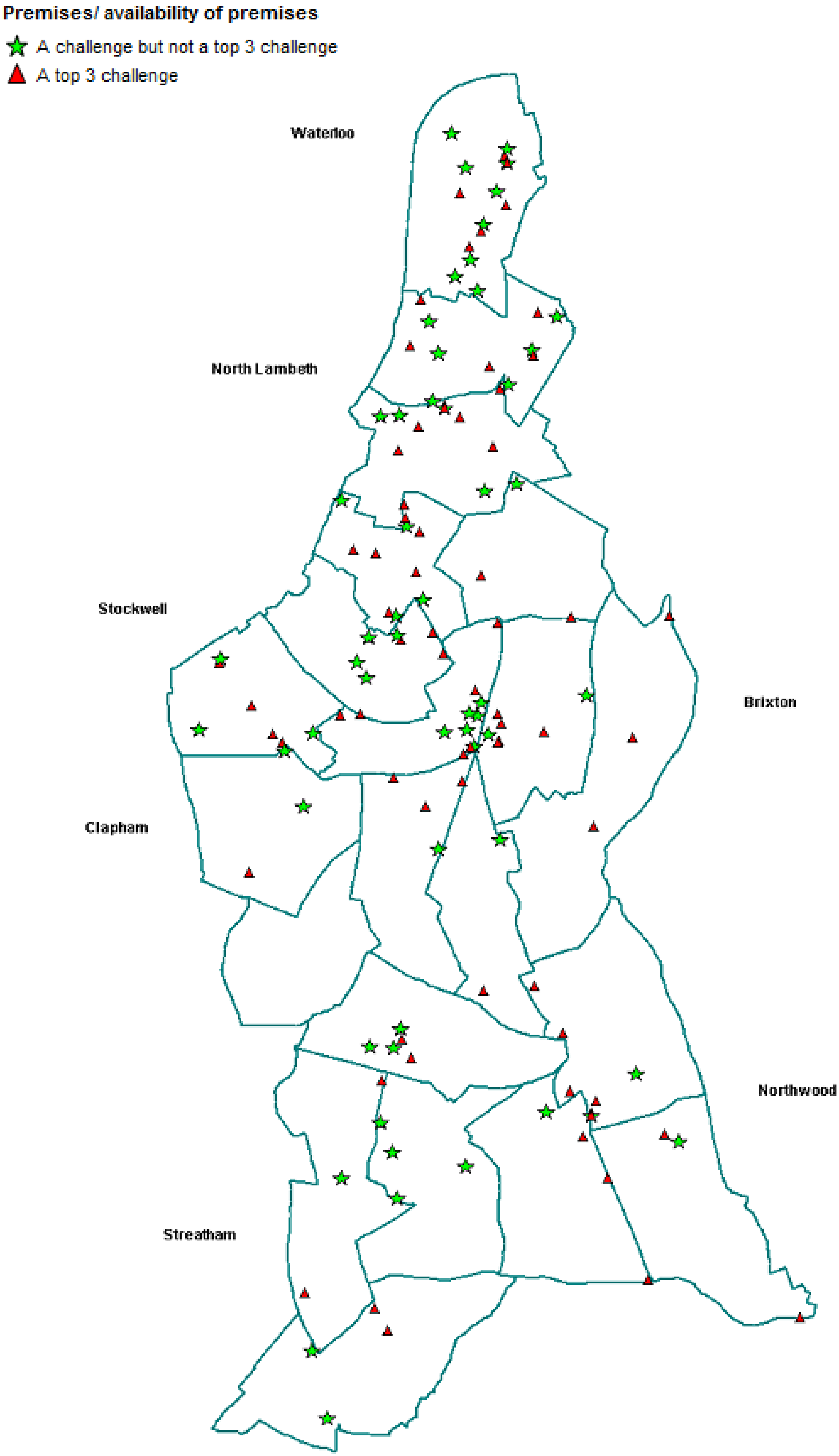
Premises/Availability of Premises

Whilst premises/availability of premises is a top 3 challenge for 13% of businesses overall, this is more frequently discussed among those in the ‘Arts, Entertainment and Recreation’ (19%), ‘Professional, Technical and Scientific’, (16%), ‘Retail’ (17%) and ‘Business Administration’ (15%) sectors.

The proportion of businesses by CLIP area referring to premises and/or the availability of premises as a top 3 challenge ranges from 8% in Brixton and 9% in Streatham to 17% in Stockwell and 21% of businesses in Clapham.

The map overleaf shows the location of businesses referring to premises/availability of premises as a challenge/top 3 challenge faced by their business.

Map 10: Location of businesses referring 'Premises/availability of premises' as a challenge/top 3 challenge



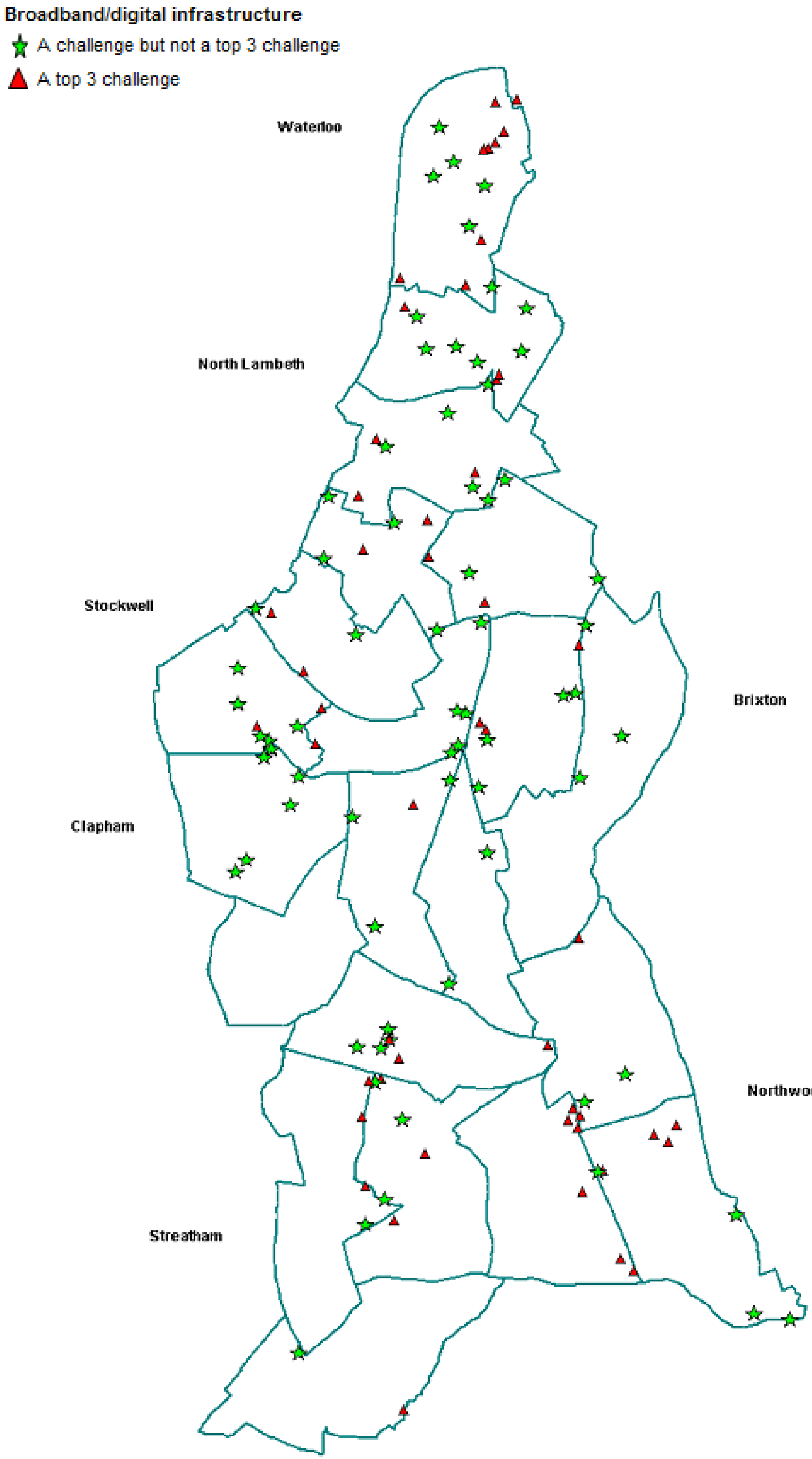
Broadband/digital infrastructure

Broadband/digital infrastructure is a top 3 challenge for 12% of businesses with this ranging from 7% in Clapham and 8% in Brixton to 13% in Streatham, 15% in Stockwell and 18% in Norwood.

This is significantly more of a challenge for businesses in the 'Professional, Technical and Scientific', 'Production, Construction and Agriculture' and 'Information, Communication, Property, Finance and Insurance' sectors (with 21%, 18% and 16% respectively rating broadband/digital infrastructure as a top 3 challenge).

The map overleaf shows the location of businesses referring to broadband/digital infrastructure as a challenge/top 3 challenge faced by their business.

Map 11: Location of businesses referring 'broadband/digital infrastructure' as a challenge/top 3 challenge



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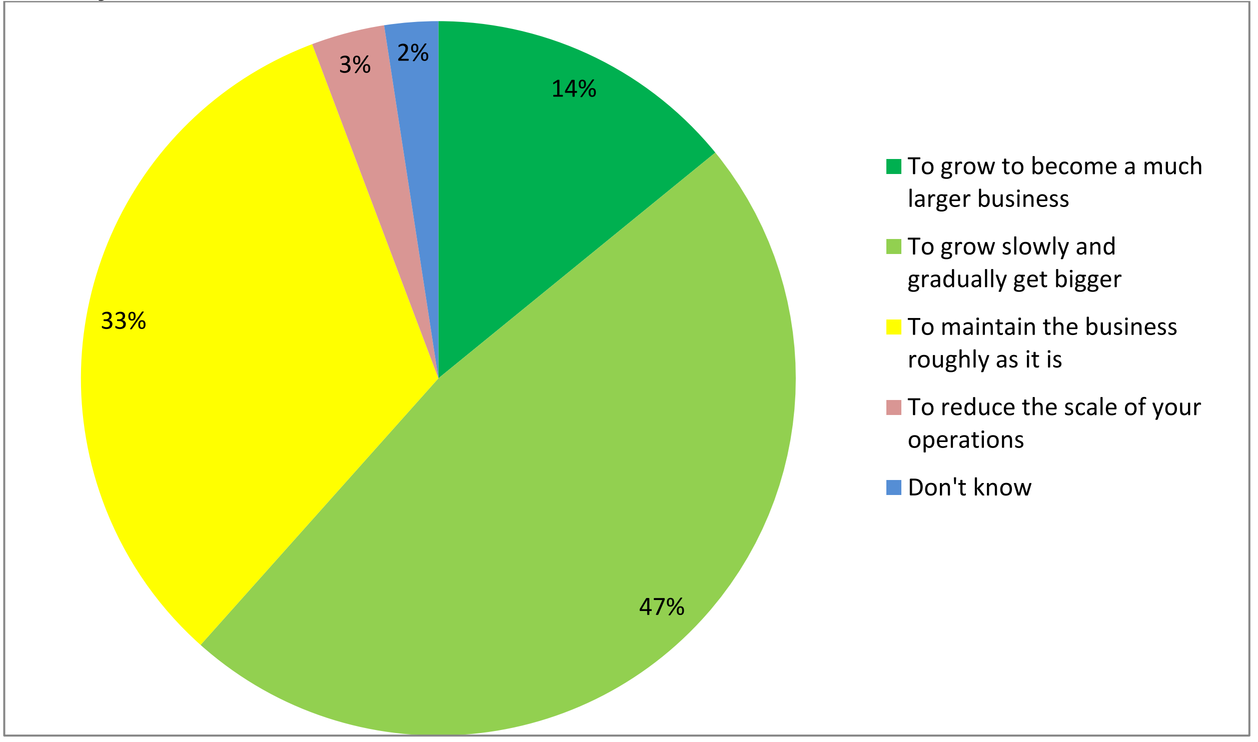
3.2.4 Business Objectives over the next 3 years

In considering the objectives of their business over the next 3 years, 61% of businesses surveyed have objectives to grow.

Chart 14 - Which of the following best describes the objectives of your business over the next 3 years?



Weighted base:726 (all respondents)

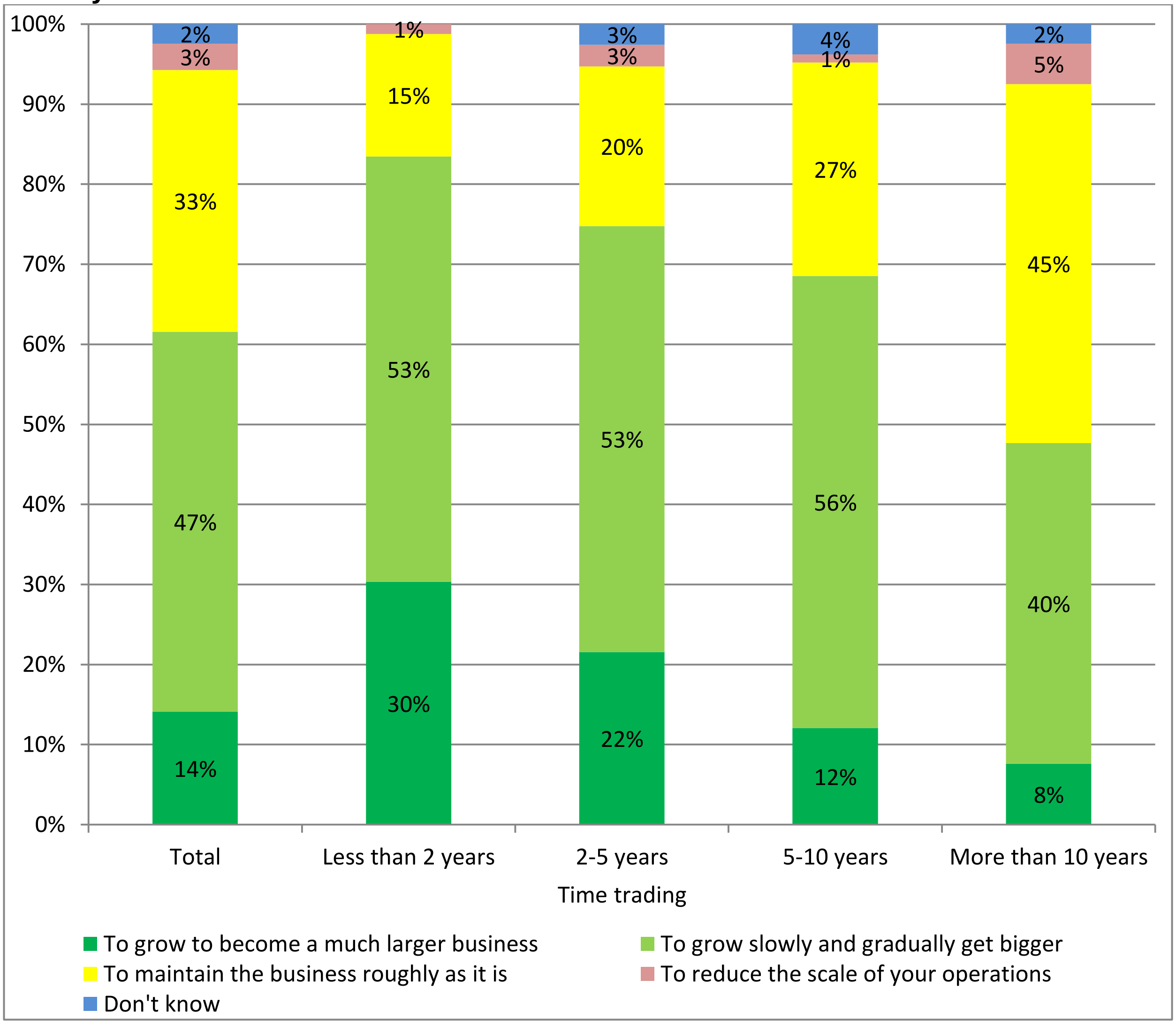
As shown, 14% expect to grow to become a much larger businesses, with the highest proportion (47%) expecting to grow slowly and gradually get bigger. Overall, only 3% expect to reduce the scale of their operations over this period with one in three looking to maintain the business roughly as it is.

These proportions are similar to those reported in the Lambeth Business Survey 2011, where 60% expected to see growth and 5% to reduce the scale of their operations.

A similar question was asked in the recent London Business Survey (LBS 2014) where it is reported that a similar proportion (63%) of businesses across London expected to see growth in their business over the next 12 months.[7] *NB different time period covered by the question in the LBS 2014 survey.*

[7] http://www.london.gov.uk/priorities/business-economy/publications/gla-economics/london-business-survey-2014

Chart 15 - Which of the following best describes the objectives of your business over the next 3 years?

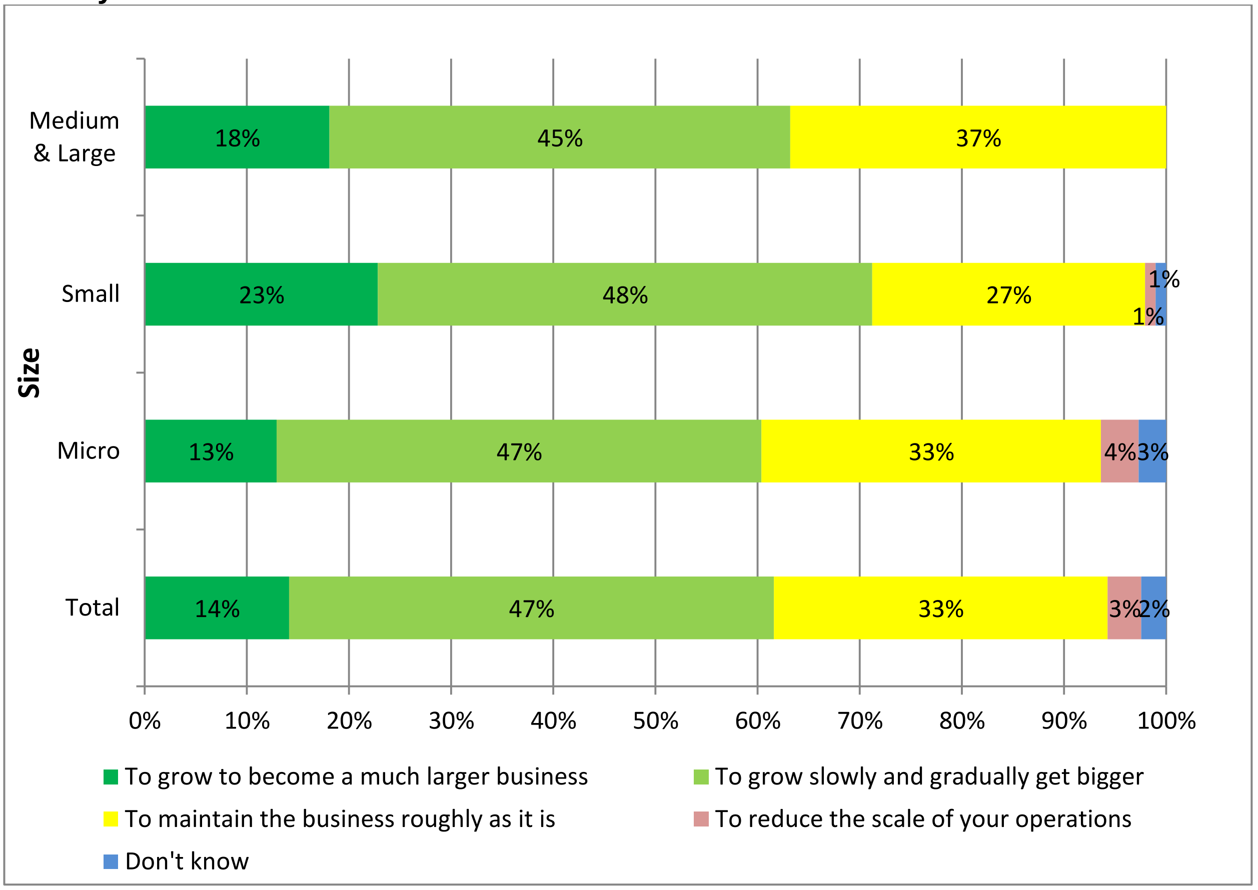


Weighted base:726 (all respondents)

As shown in the chart above, ambitions for growth are higher among newly established businesses (83% expect to see growth), with more established businesses increasingly looking to maintain their business roughly as it is.

Small businesses (those with between 10 and 49 employees) more frequently refer to growth objectives as shown in the chart below.

Chart 16 - Which of the following best describes the objectives of your business over the next 3 years?

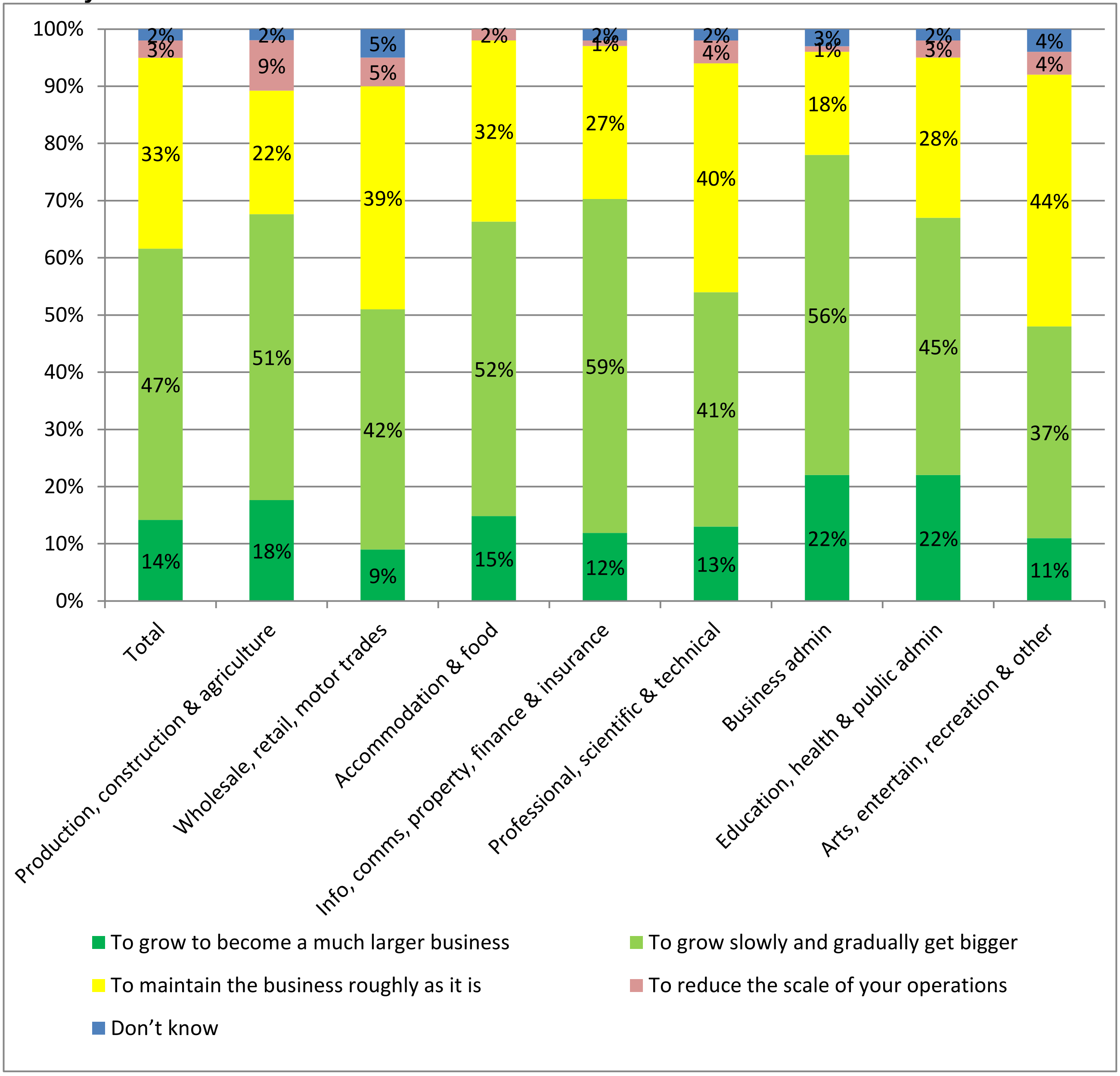


Weighted base:726 (all respondents)

One in three micro businesses (those with 0-9 employees) expect to maintain the business roughly as it is, with this the case for 42% of sole traders. The same proportions of sole traders (42%) also expect to grow slowly and gradually get bigger.

Ambitions to 'grow to become much larger' are suggested by 20% in each of the Waterloo and Clapham CLIP areas and by 22% in each of the 'Business Administration' and 'Education, Health and Public Administration' sectors.

Chart 17 - Which of the following best describes the objectives of your business over the next 3 years?



Weighted base:726 (all respondents)

In considering business ownership, a high proportion (78%) of businesses majority owned by those from Black ethnic backgrounds have objectives to grow over the next 3 years with this the case for 60% of majority White and 52% of majority Asian owned businesses.

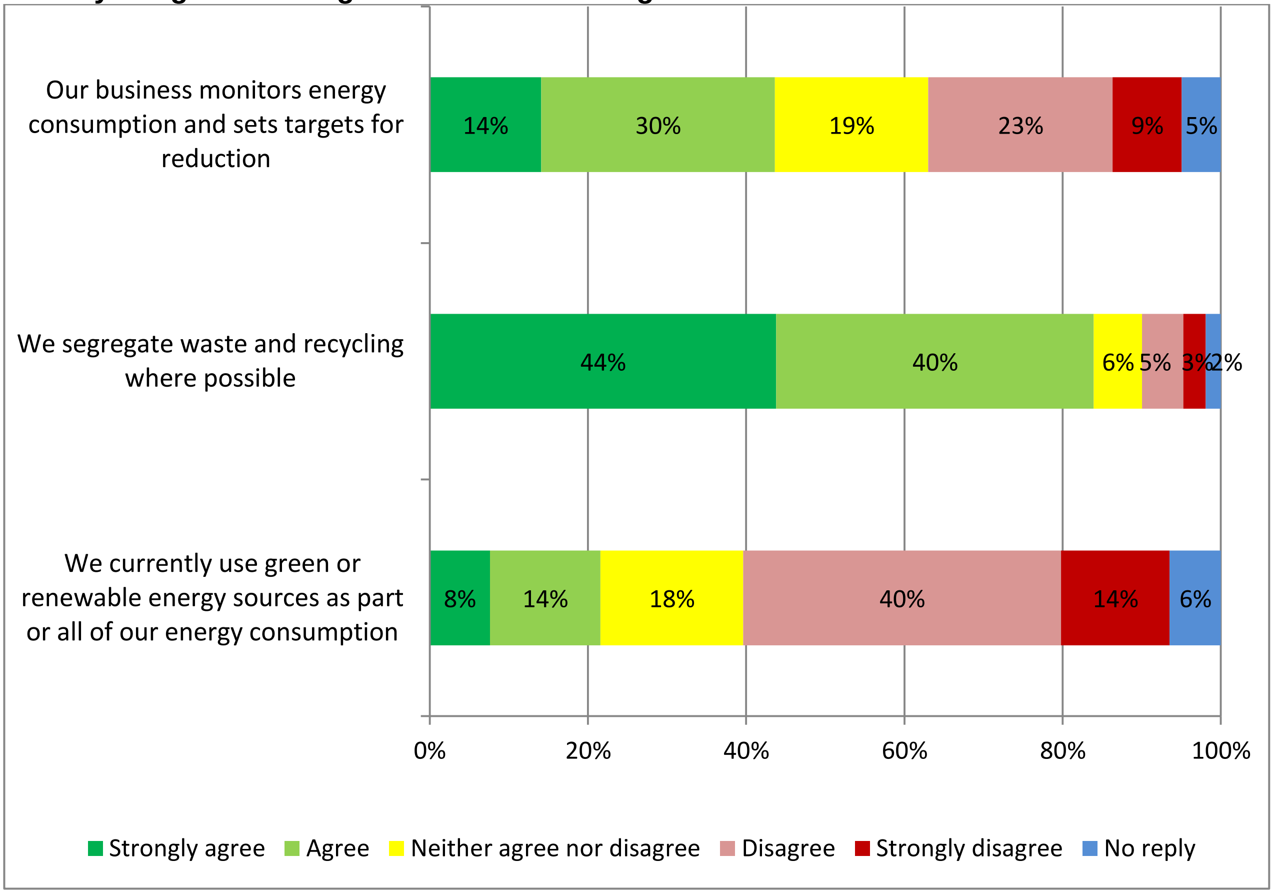
Not surprisingly, objectives to grow are also highest among businesses who have seen employee numbers increase over the last 12 months, with 78% of these businesses expecting to see growth in their business over the next 3 years.

3.2.5 Energy Usage and Renewable Energy

Businesses were asked how far they agreed or disagreed with a series of statements about energy usage and renewable energy sources.

The chart below shows the overall proportions agreeing and disagreeing with each of the statements.

Chart 18 - On a scale of 1 to 5, where 1 is strongly agree and 5 is strongly disagree, how far do you agree or disagree with the following statements?



Weighted base:726 (all respondents)

Our business monitors energy consumption and sets targets for reduction

Some 44% of businesses agree (strongly agree or agree) that their business monitors energy consumption and sets targets for reduction. This is similar to the figure recorded for this statement in the 2011 Lambeth Business Survey where 42% of businesses agreed with this statement. The same proportion in 2011 as in 2015 (32%) claimed to disagree with this statement.

The proportions agreeing with this statement are higher among those in the 'Retail' (59%) and 'Arts, Entertainment and Recreation' (58%) sectors, with only 28% of those in the 'Production, Construction and Agriculture' sector agreeing with this statement.

Medium/Large size enterprises (those with 50 or more employees) are also more likely to monitor energy consumption and set targets for reduction (61%) compared with 55% of small and 42% of micro businesses.

The table below details the proportion of respondents agreeing (strongly agree and agree) with this statement.

Figure 19 - On a scale of 1 to 5, where 1 is strongly agree and 5 is strongly disagree, how far do you agree or disagree with the following statement?

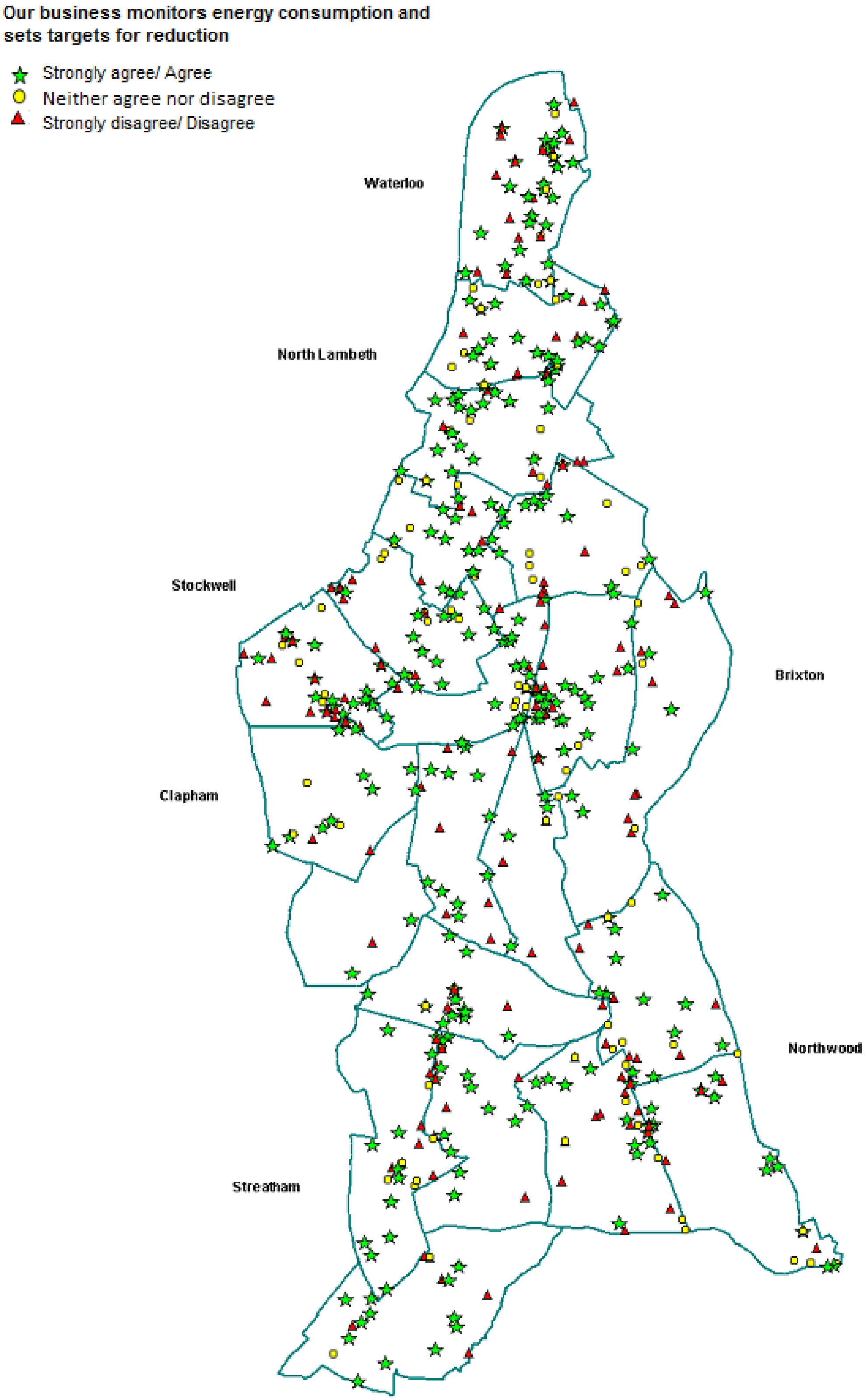
	% agreeing							
	Overall	Brixton	Clapham	North Lambeth	Norwood	Stockwell	Streatham	Waterloo
Our business monitors energy consumption and sets targets for reduction	44%	49%	49%	36%	39%	46%	42%	41%

Weighted base:690 (all respondents excluding don't knows)

As shown in the table above, businesses in Clapham, Brixton and Stockwell more frequently agree with this statement.

The map overleaf highlights the location of businesses agreeing and disagreeing with the statement that 'Our business monitors energy consumption and sets targets for reduction'.

Map 12: Location of businesses agreeing/disagreeing that their business monitors energy consumption and sets targets for reduction.



We segregate waste and recycling where possible

Some 84% of businesses agree (strongly agree or agree) that their business segregates waste and recycling where possible. This figure is slightly higher when compared to the findings on the 2011 Lambeth Business Survey where 79% of businesses agreed with this statement. Disagreement with this statement has also reduced since 2011 with 8% in 2015 disagreeing that they segregate waste and recycling where possible compared with 12% suggesting this in 2011.

The proportions agreeing with this statement include 87% of those in the 'Arts, Entertainment and Recreation', 'Production, Construction and Agriculture' and 'Education, Health and Public Administration' sectors.

Medium/Large size enterprises (those with 50 or more employees) are again more likely to segregate waste and recycling where possible (91%) compared with 87% of small and 83% of micro businesses.

Figure 20 – On a scale of 1 to 5, where 1 is strongly agree and 5 is strongly disagree, how far do you agree or disagree with the following statement?

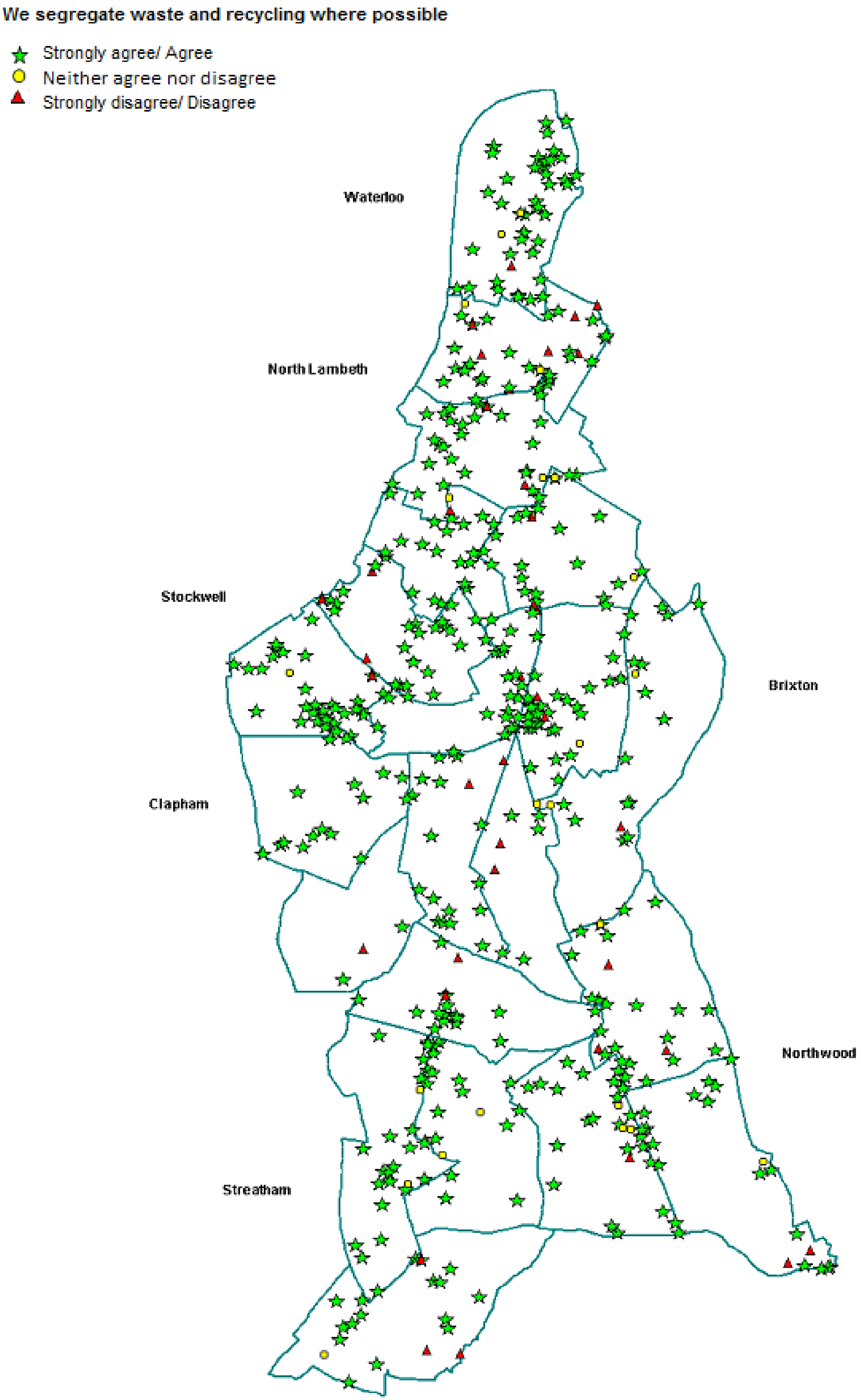
	% agreeing							
	Overall	Brixton	Clapham	North Lambeth	Norwood	Stockwell	Streatham	Waterloo
We segregate waste and recycling where possible	84%	78%	83%	83%	80%	89%	89%	86%

Weighted base:712 (all respondents excluding don't knows)

As shown in the table above, businesses in Stockwell, Streatham and Waterloo more frequently agree with this statement.

The map overleaf highlights the location of businesses agreeing and disagreeing with the statement that 'we segregate waste and recycling where possible'.

Map 13: Location of businesses agreeing/disagreeing that their business segregates waste and recycling where possible.



We currently use green or renewable energy sources as part or all of our energy consumption

Some 22% of businesses agree (strongly agree or agree) that their business currently uses renewable energy sources as part or all of their energy consumption.

The proportions agreeing with this statement are higher among those in the ‘Wholesale, Retail, Motor Trades and Transport’ (32%), ‘Health’ (31%) and ‘Arts, Entertainment, Recreation and other services’ (28%) sectors.

Some 28% of sole traders also agree with this statement compared with 19% of registered companies and 22% of businesses overall.

Medium/Large size enterprises (those with 50 or more employees) more frequently agree that they use green or renewable energy as part or all of their energy consumption (27%) compared with 22% of small and 21% of micro businesses.

Figure 21 – On a scale of 1 to 5, where 1 is strongly agree and 5 is strongly disagree, how far do you agree or disagree with the following statement?

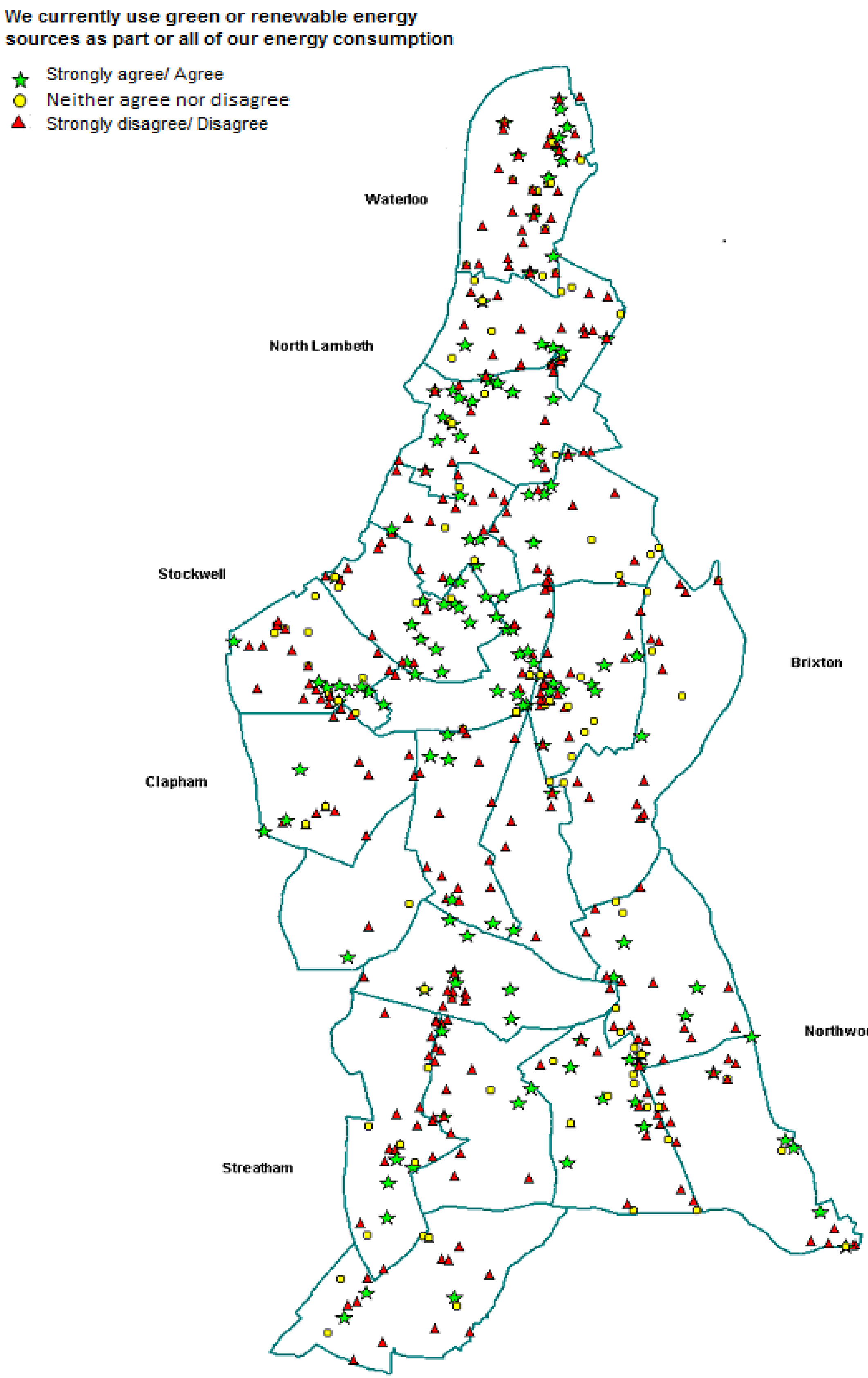
	% agreeing							
	Overall	Brixton	Clapham	North Lambeth	Norwood	Stockwell	Streatham	Waterloo
We currently use green or renewable energy sources as part or all of our energy consumption	22%	23%	27%	20%	25%	24%	14%	17%

Weighted base:679 (all respondents excluding don’t knows)

As shown in the table above, businesses in Clapham and Norwood more frequently agree with this statement.

The map overleaf highlights the location of businesses agreeing and disagreeing with the statement that ‘we currently use green or renewable energy sources as part or all of our energy consumption’.

Map 14: Location of businesses agreeing/disagreeing that their business currently uses green or renewable energy sources as part or all of their energy consumption.



3.3 Employment

- ***The majority (87%) of businesses surveyed have between 0 and 9 employees.***
- ***In considering change in employment numbers over the last 12 months, one in five businesses (20%) claim the number of employees at their business to have increased with only 7% reporting a decrease. This shows an improvement on the position in the 2011 Lambeth Business Survey where 14% had experienced an increase and 19% a decrease in employee numbers over the previous 12 months.***
- ***Encouragingly 30% of businesses expect to see an increase in staff numbers over the next 12 months with only 2% overall expecting to see a decrease. Again this shows an improvement on the results from the 2011 Lambeth Business Survey where 23% had expected to see an increase and 19% a decrease in employee numbers over the next 12 months.***
- ***The majority suggest there are no skills gaps or were unable to identify particular skills lacking in their current workforce (82%).***

3.3.1 Number of Employees

Businesses were asked a series of questions regarding their workforce and skills.

As shown in the table below, the majority (87%) of businesses have between 0 and 9 employees.

Figure 22 – Including yourself, how many members of staff work at this site/location?

	%
Micro (0-9)	87%
Small (10-49)	11%
Medium (50-249)	3%
Large (250+)	<1%

Weighted base:726 (all respondents)

In considering change in employment numbers over the last 12 months, one in five businesses (20%) claim the number of employees at their business to have increased with only 7% reporting a decrease.

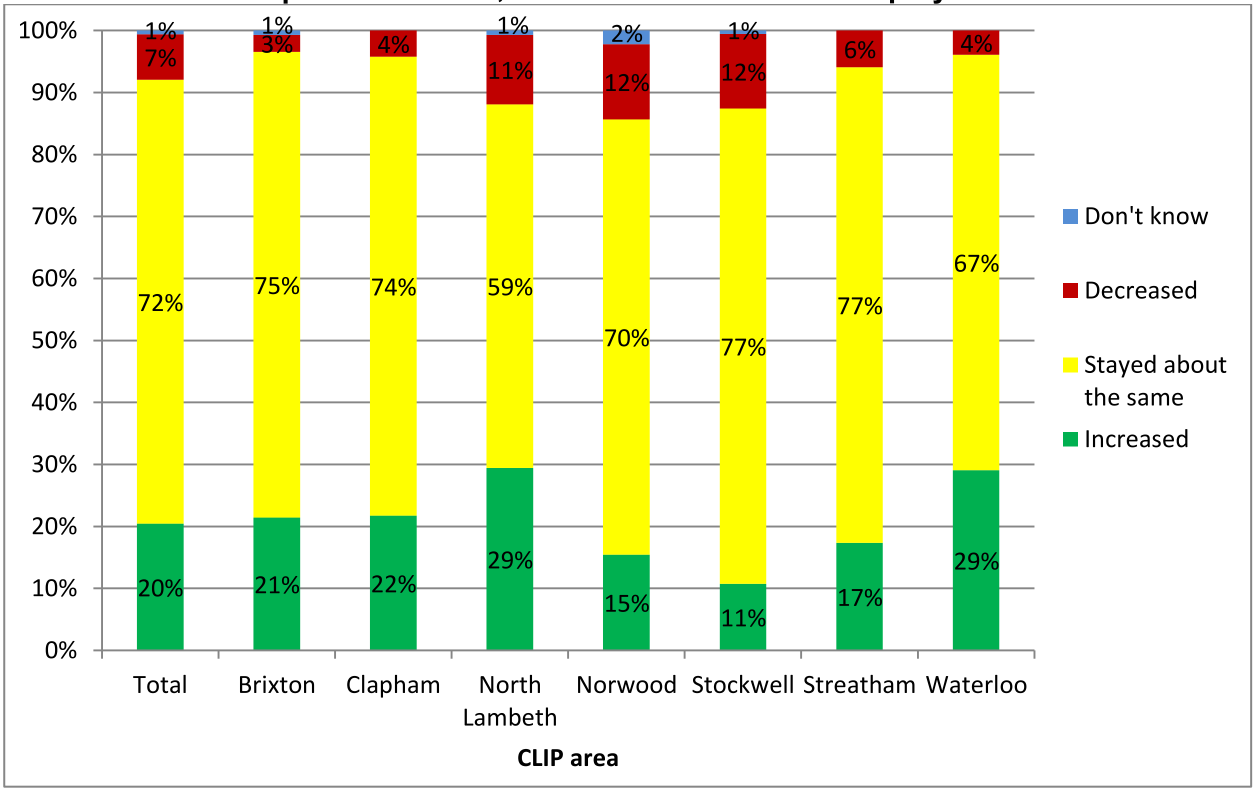
This is a significant improvement on the picture in 2011 where 14% of businesses taking part in the Lambeth Business Survey 2011 referred to an increase and 19% a decrease in employee numbers.

Overall figures in the Lambeth Business Survey 2015 show a more positive position than that recorded across London in the London Business Survey 2014[8]. In the London Business Survey 2014, it is reported that in the 12 months to mid 2014 three quarters of businesses in London had experienced no change in employee numbers with 13% an increase over this period of time and 12% reporting a decrease.

The chart overleaf shows the change in employee numbers over the last 12 months by CLIP area.

As can be seen, businesses in Waterloo and North Lambeth most frequently report an increase (29% in each area) with this ranging down to 11% of businesses in Stockwell and 15% in Norwood. Decreases in employee numbers over the past 12 months are also more frequently reported in Norwood and Stockwell.

Chart 19 – Over the past 12 months, has the number of staff employed at this site…?



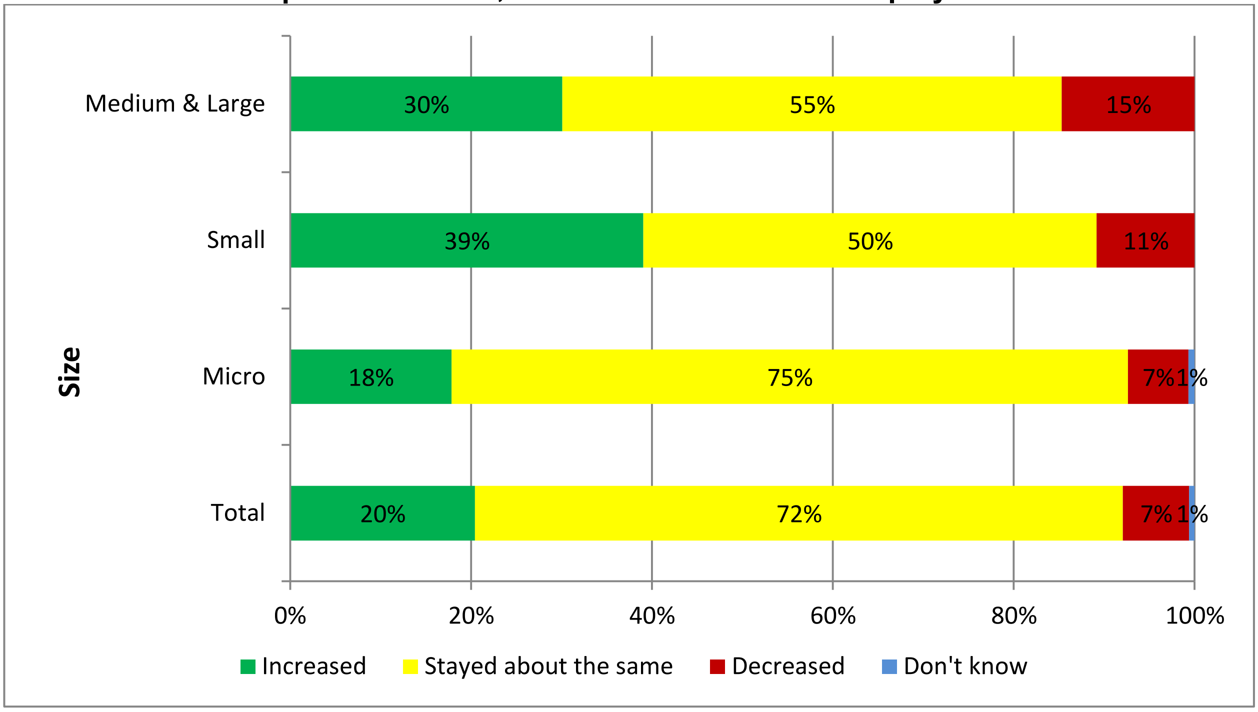
Weighted base:726 (all respondents)

Registered businesses report the highest proportion of increases in employee numbers with 26% of businesses in this classification reporting an increase over the last 12 months.

Businesses with between 10 and 49 employees (small businesses) significantly most frequently report employee numbers to have increased over the last 12 months as shown in the chart overleaf.

[8] http://www.london.gov.uk/priorities/business-economy/publications/gla-economics/london-business-survey-2014

Chart 20 – Over the past 12 months, has the number of staff employed at this site…?

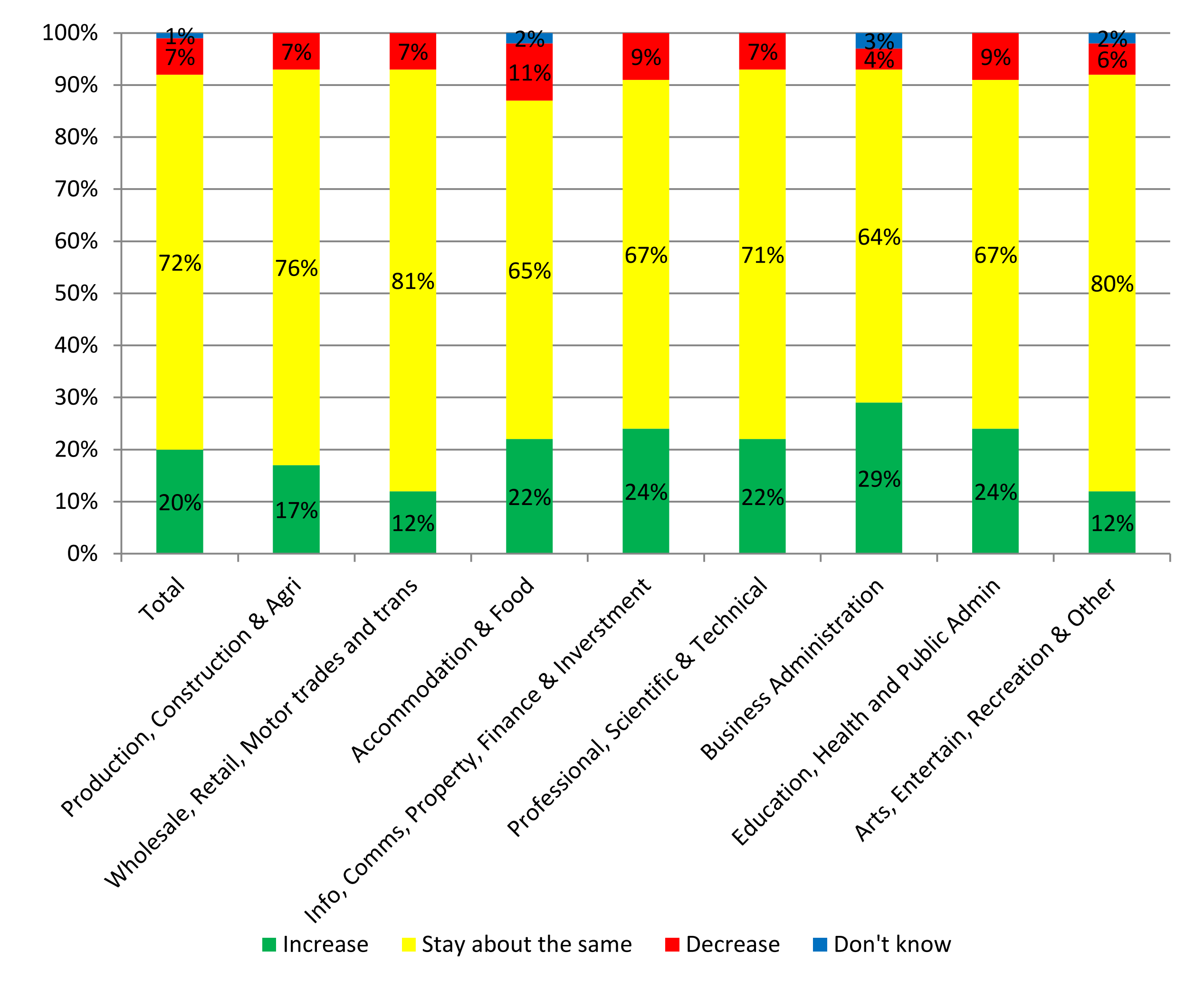


Weighted base:726 (all respondents)

One in four (25%) businesses located within BID areas claim employee numbers to have increased over the last 12 months with this the case for a slightly smaller proportion (19%) of businesses not located in BID areas.

Businesses in the 'Business Administration' (29%), 'Education, Health and Public Administration' (24%) and 'Information, Communications, Property, Finance and Insurance' (24%) sectors most frequently report increases in employee numbers over the last 12 months.

Chart 21 – Over the past 12 months, has the number of staff employed at this site…?



Weighted base:726 (all respondents)

As shown in the chart above, decreases in employee numbers are most frequently reported among businesses in the 'Accommodation and Food' (11%) sector.

Some 23% of businesses majority owned by those from Black ethnic backgrounds have seen an increase in employee numbers over the last 12 months with this the case for 20% of those majority White and 17% of those majority Asian owned businesses.

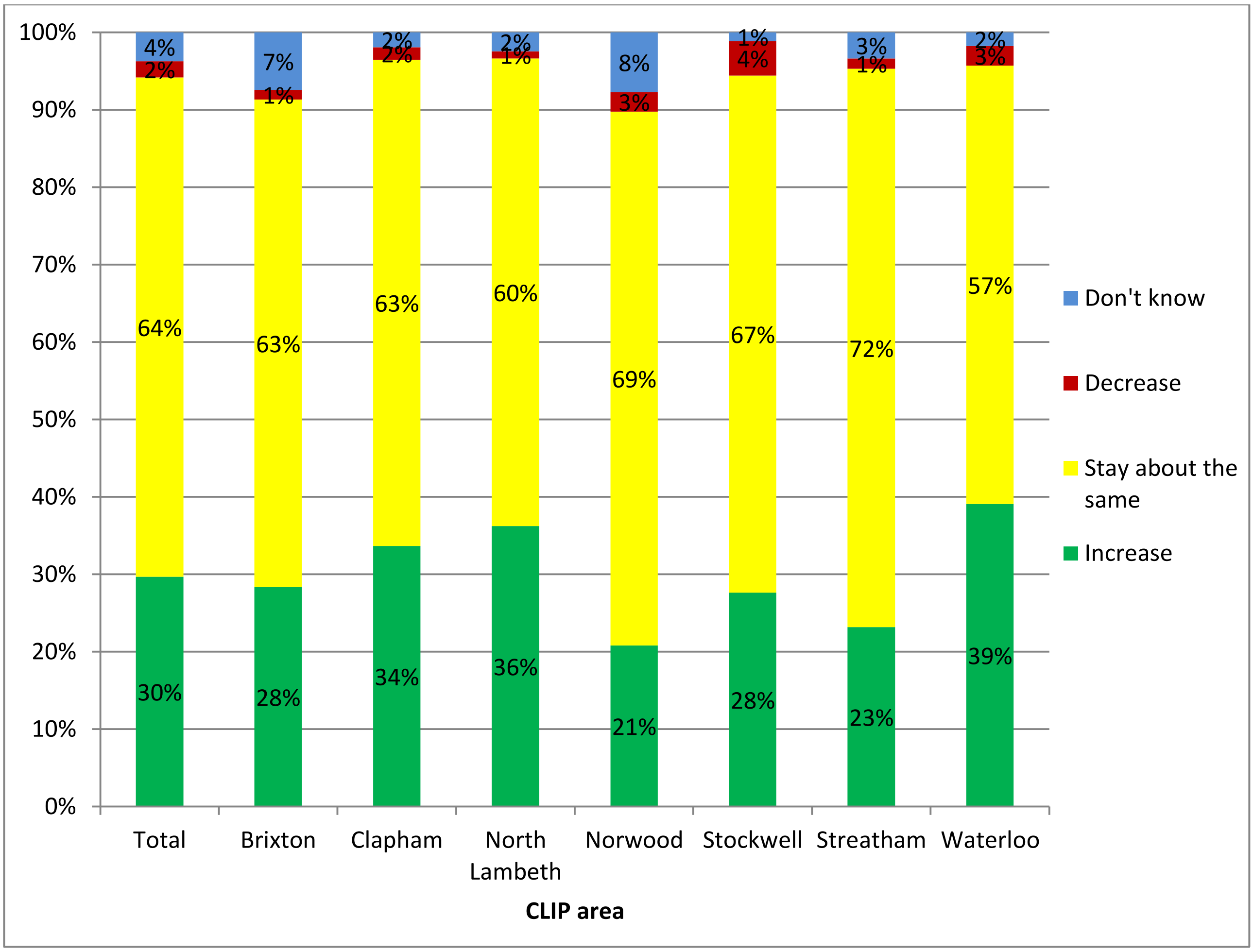
Businesses taking part in the Lambeth Business Survey 2015 were also asked whether they expected the number of staff at their business to increase, decrease or remain the same over the next 12 months.

Encouragingly 30% of businesses expect to see an increase in staff numbers over the next 12 months with only 2% overall expecting to see a decrease. Again this shows a significant improvement on the position in 2011 where 23% of businesses taking part in the Lambeth Business Survey 2011 expected to see an increase in staff numbers over the next 12 months and 19% a decrease.

Overall figures in the Lambeth Business Survey 2015 (with 30% overall expecting to see an increase in employee numbers, 2% a decrease and 64% no change over the next 12 months) again show a more positive position than that recorded across London in the London Business Survey 2014[9]. In the London Business Survey 2014, it is reported that over the next 12 months 22% of businesses in London expect to see an increase in staff numbers with 74% expecting staff numbers to remain stable over this period of time and 3% expecting a decrease.

The chart below shows the proportions of businesses expecting to see a change in staff numbers by CLIP area.

Chart 22 – Over the next 12 months, do you expect the number of staff employed at this site to…?



Weighted base:726 (all respondents)

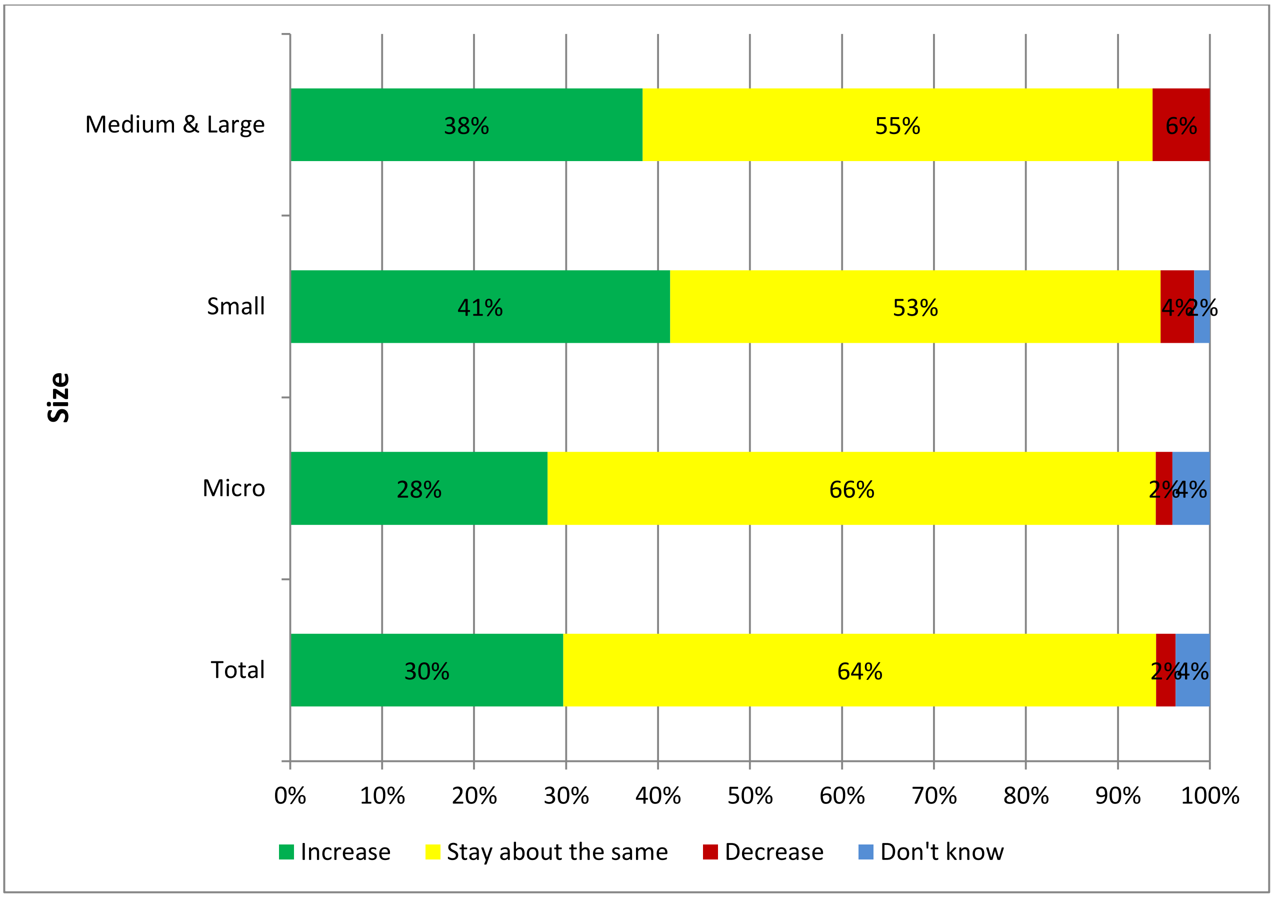
As shown in the chart above, following the trend over the last 12 months, businesses in Waterloo (39%) and North Lambeth (36%) most frequently expect to see an increase in employee numbers.

[9] http://www.london.gov.uk/priorities/business-economy/publications/gla-economics/london-business-survey-2014

Some 59% of those who had seen an increase in staff numbers over the last 12 months expect to see a further increase over the next 12 months. Encouragingly 32% of those who had seen a decrease over the last 12 months also expect to see an increase in employee numbers over the next 12 months, with 19% of these businesses expecting to see a further decrease. Three quarters of those whose workforce had remained stable over the last year also expect this to be the case over the next 12 months.

Small businesses (those with between 10 and 49 employees) significantly more frequently expect to see an increase in employee numbers over the next 12 months.

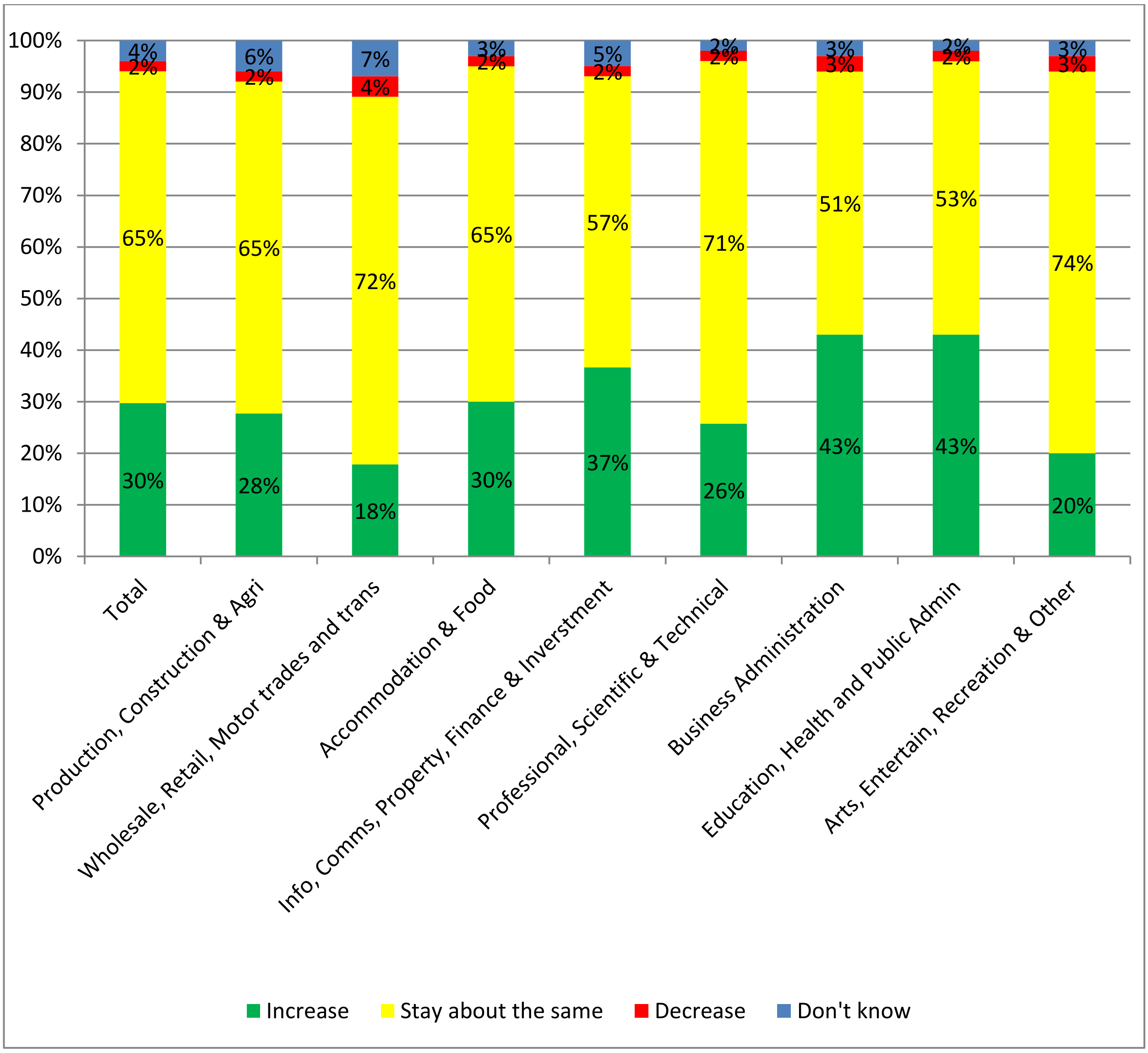
Chart 23 – Over the next 12 months, do you expect the number of staff employed at this site to…?



Weighted base:726 (all respondents)

In line with changes in staff numbers over the last 12 months, it is again businesses in the 'Business Administration' (43%) and 'Education, Health and Public Administration' (43%) sectors most frequently expecting to see increases in employee numbers over the next 12 months.

Chart 24 – Over the next 12 months, do you expect the number of staff employed at this site to…?



Weighted base:726 (all respondents)

Again, businesses majority owned by those from Black ethnic backgrounds are the most confident about employee numbers increasing over the next 12 months (36% expect to see an increase compared with 29% of businesses majority White owned and 25% of majority Asian owned businesses).

3.3.2 Skills lacking in current workforce

Businesses were also asked if they felt there were any skills lacking in their current workforce. Spontaneous responses to this question (with no prompting) are detailed in the table overleaf.

Figure 23 – Are there any skills you would say are lacking in your current workforce?

	%
Job specific skills	6%
IT/computer skills	3%
Sales/marketing skills	2%
Leadership and management skills	1%
Customer service skills	1%
Administration	1%
Multiple languages lacking	1%
Numeracy skills	<1%
Health and safety	<1%
Literacy skills	<1%
English skills lacking	<1%
First Aid	<1%
None	57%
Don't know/no opinion	25%
Other	4%

Weighted base:726 (all respondents)

As shown, the majority suggest there are no skills gaps or are unable to identify particular skills lacking in their current workforce (82%).

Where skills were identified to be lacking in the current workforce, these are most frequently cited as job specific skills, IT/computer skills and sales and marketing skills.

Job specific skills are most frequently discussed to be lacking within the ‘Production, Construction and Agriculture’ (12%) and ‘Health’ (9%) sectors.

‘Job specific’ skills referred to above include plumbing, electrical, engineering, technical, carpentry, design/graphic design, fund raising, beauty, hairdressing, financial/accountancy, photography and health care skills.

As shown in the table above, smaller proportions refer to leadership and management, customer service, multiple language and administration skills.

3.4 Recruitment

- ***In considering whether they felt there were any challenges to recruitment at the current time, encouragingly three quarters (74%) of businesses suggest there are none. A lack of applicants with the required skills is discussed by the highest proportion, 13%.***
- ***In considering the methods they used to recruit staff, more than one in three (35%) businesses surveyed refer to word of mouth.***
- ***42% of businesses taking part in the survey make particular effort to recruit local people. This figure has dropped since 2011 with 53% of businesses in the 2011 Lambeth Business Survey claiming to make particular effort to recruit local people. Businesses who do make a particular effort to recruit local people most frequently cited transport and travel being easier as the reason for this.***
- ***Some 15% of businesses taking part in the survey already offer Apprenticeships with a further 22% considering doing so in the future. In 63% of cases, businesses claim these Apprenticeships to lead to people being taken on permanently.***
- ***One in four businesses (25%) currently offer work experience placements (through schools, colleges, training/work placement agencies). In 46% of cases, work experience placements are claimed to lead to people being taken on permanently.***

3.4.1 Challenges to recruitment

In considering whether they felt there were any challenges to recruitment at the current time, encouragingly three quarters of businesses (74%) suggest there are none.

A lack of applicants with the required skills is discussed by 13%, with this most frequently discussed among businesses in the 'Production, Construction and Agriculture' (19%), 'Information, Communication, Property, Finance and Insurance' (17%) and 'Professional, Technical and Scientific' (15%) sectors.

Figure 24 – Would you say there are any challenges to recruitment at the present time?

	%
No - none at present	74%
Lack of applicants with the required skills	13%
Lack of applicants with the required attitude/motivation	6%
Lack of qualifications the company demands	3%
Lack of work experience the company demands	3%
Low number of applicants	2%
Too much competition from other employers	1%
Costs	1%
Poor career progression	1%
Cost of living in London	1%
Job entails shift work/unsociable hours	1%
Lack of funding	<1%
Unsuitable applicants	<1%
Language barrier	<1%
No response	<1%
Other	3%

Weighted base:726 (all respondents)

A lack of applicants with the required attitude/motivation is referred to by 6% overall with this most frequently discussed by businesses located Stockwell (10%).

Applicants lacking the work experience the company demands and qualifications required by companies are each referred to by 3% of businesses. A general low number of applicants and too much competition from other employees are also discussed by 2% and 1% respectively.

3.4.2 Recruitment Methods

Businesses were asked a series of question about the recruitment of staff. In considering the methods they used to recruit staff, more than one in three (35%) refer to word of mouth, with this being the case for the highest proportion of micro businesses (36%).

Figure 25 – What methods do you use to recruit staff?

	%
Word of mouth	35%
Recruitment websites (e.g. Monster, fish4jobs)	18%
Private recruitment agency	10%
Advertising on own website	9%
Jobcentre Plus	8%
Local newspapers	5%
Direct applications/CVs	5%
Shop window/store advertisement	4%
Schools/colleges/universities	3%
Family/relatives	3%
Advertisement in trade magazine	2%
Social Media	2%
Broadsheet newspapers	1%
Head Office	1%
Networks/networking	1%
Gumtree	1%
In-house/internal	1%
Job Brokerage Service	<1%
Specialist journals/papers	<1%
Trade websites	<1%
Lambeth Working	<1%
Other	3%
None/NA - we do not recruit staff	27%

Weighted base:726 (all respondents)

Businesses in the ‘Accommodation and Food’ (41%), ‘Production, Construction and Agriculture’ (39%) and ‘Information, Communication, Property, Finance and Insurance’ (38%) sectors most frequently refer to word of mouth as their preferred recruitment method.

As shown in the table above, recruitment websites are used by 18% of businesses overall with this approach used most frequently by those in the ‘Business Administration’ sector (40%).

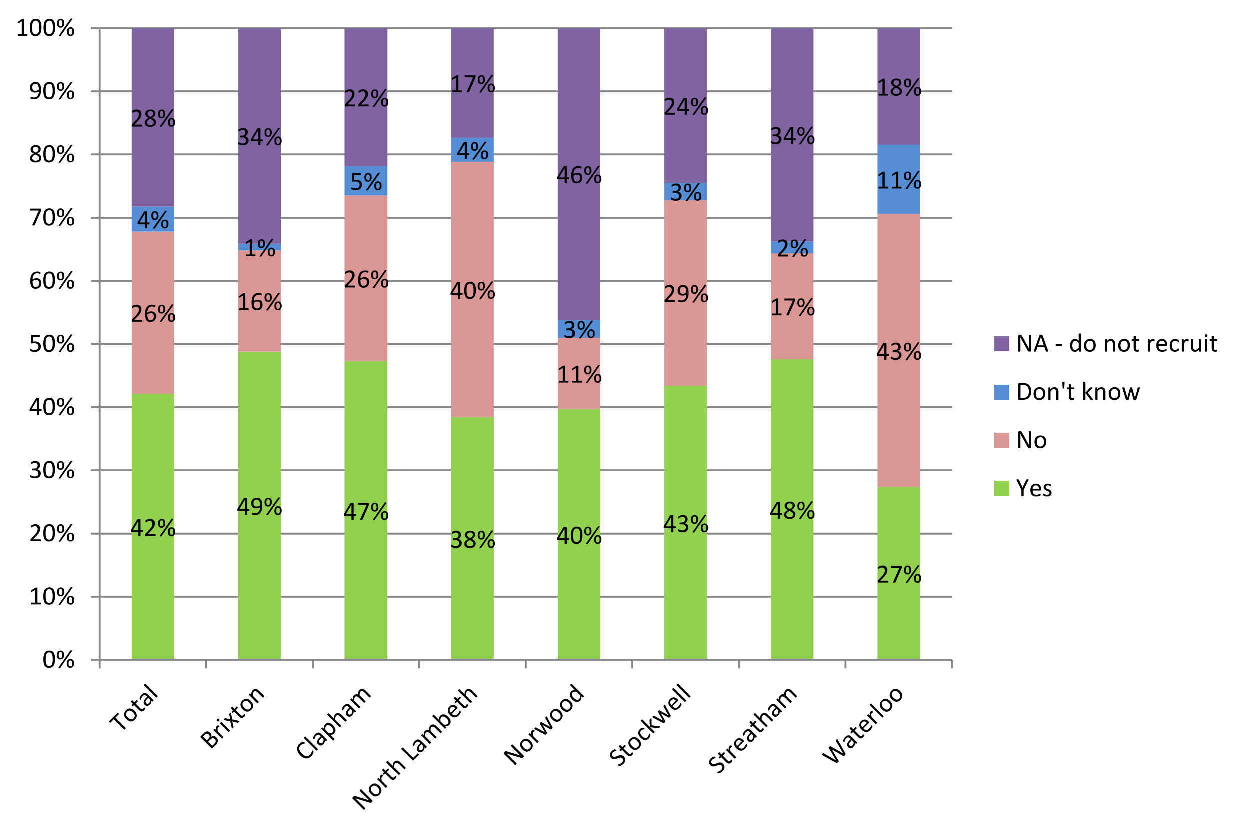
Some 8% of businesses claim to use Jobcentre Plus for recruitment with this being a similar proportion to that recorded across London in the London Business Survey 2014[10] where 9% of business units claimed to use Jobcentre Plus for recruitment.

[10] http://www.london.gov.uk/priorities/business-economy/publications/gla-economics/london-business-survey-2014

3.4.3 Recruitment of local staff

Some 42% of businesses taking part in the survey make particular effort to recruit local people, with this the case for 49% of businesses in Brixton, 48% in Streatham and 47% in Clapham.

Chart 25 – When you recruit staff, do you make any particular effort to recruit local people?



Weighted base: 726 (all respondents)

As shown, approximately one in four businesses (26%) do not make particular effort to recruit local people with this significantly more frequently the case in the Waterloo (43%) and North Lambeth (40%) CLIP areas.

Businesses in the 'Accommodation and Food', 'Business Administration' and 'Production, Construction and Agriculture' sectors (55%, 50% and 48% respectively) claim to make a particular effort to recruit local people.

Proportions making particular effort to recruit local people ranged from 36% of businesses majority owned by those from White ethnic backgrounds to 43% of majority Asian owned and 53% of Black owned businesses.

Businesses who do make a particular effort to recruit local people most frequently cite transport and travel being easier as the reason for this.

Figure 26 – Why do you make particular effort to recruit local people?

	%
Transport/travel easier	34%
Convenience	25%
Local people/staff more reliable	13%
Like to support the local area/local economy	13%
Local knowledge/knowing the area and advantage	13%
Helps time keeping	9%
Shirt times/hours suit local people	6%
Skills more important	4%
Don't discriminate against anyone	3%
Qualifications more important	2%
Require specialist skilled people	2%
Prefer/try to recruit locally	2%
Best candidate gets the job regardless of location	1%
Don't know	<1%
Other	5%

Weighted base:304 (respondents who make particular effort to recruit local people)

As shown in the table above, one in four (25%) refer to convenience. The reliability of local people, employees knowing the area being advantageous and liking to support the local economy are each cited by 13% of businesses as reasons for local recruitment preferences.

The 26% of businesses who do not make particular effort to recruit local people most frequently cite skills being more important as their reason for this.

Figure 27 – Why do you not make particular effort to recruit local people?

	%
Skills more important	35%
Don't discriminate against anyone	25%
Best candidate gets the job regardless of location	20%
Require specialist skilled people	13%
Experience more important	10%
Qualifications more important	6%
Other	4%
Convenience	3%
Transport/travel easier	3%
Don't know	3%
Family only	1%
Local people/staff more reliable	<1%
Local knowledge/knowing the area and advantage	<1%
Like to support the local area/local economy	<1%
Do not recruit	<1%
Shift times/hours suit local people	<1%

Weighted base:186 (respondents who do not make particular effort to recruit local people)

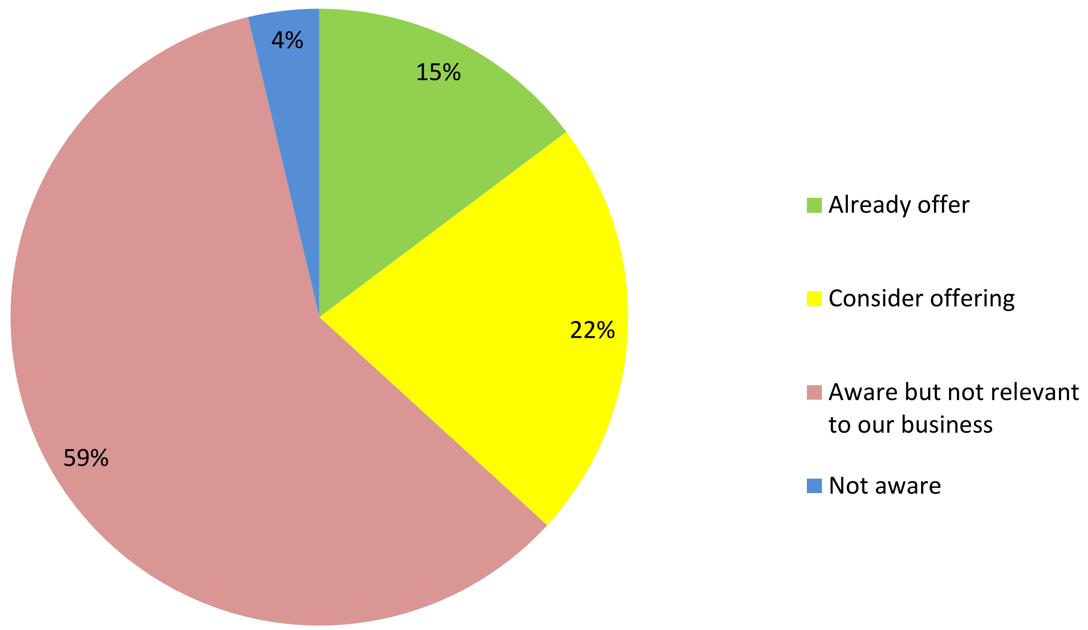
As shown, one in four refer to not discriminating against anyone with one in five suggesting the best candidate gets the job regardless of where they live.

Jobs requiring specialist skilled people and experience and qualifications being more important are also discussed.

3.4.4 Apprenticeships and work placements

Some 15% of businesses taking part in the survey already offer Apprenticeships with a further 22% considering doing so in the future.

Chart 26– Does your business already offer, or would you consider offering Apprenticeships?



Weighted base:726 (all respondents)

This shows an increase from the figure recorded in the Lambeth Business Survey 2011 where 10% of businesses were offering Apprenticeships.

Encouragingly, this is also higher than the proportion reporting to currently employ Apprentices in the London Business Survey 2014 where in the 12 months to mid 2014, 9% of businesses across London claimed to employ Apprentices.[11]

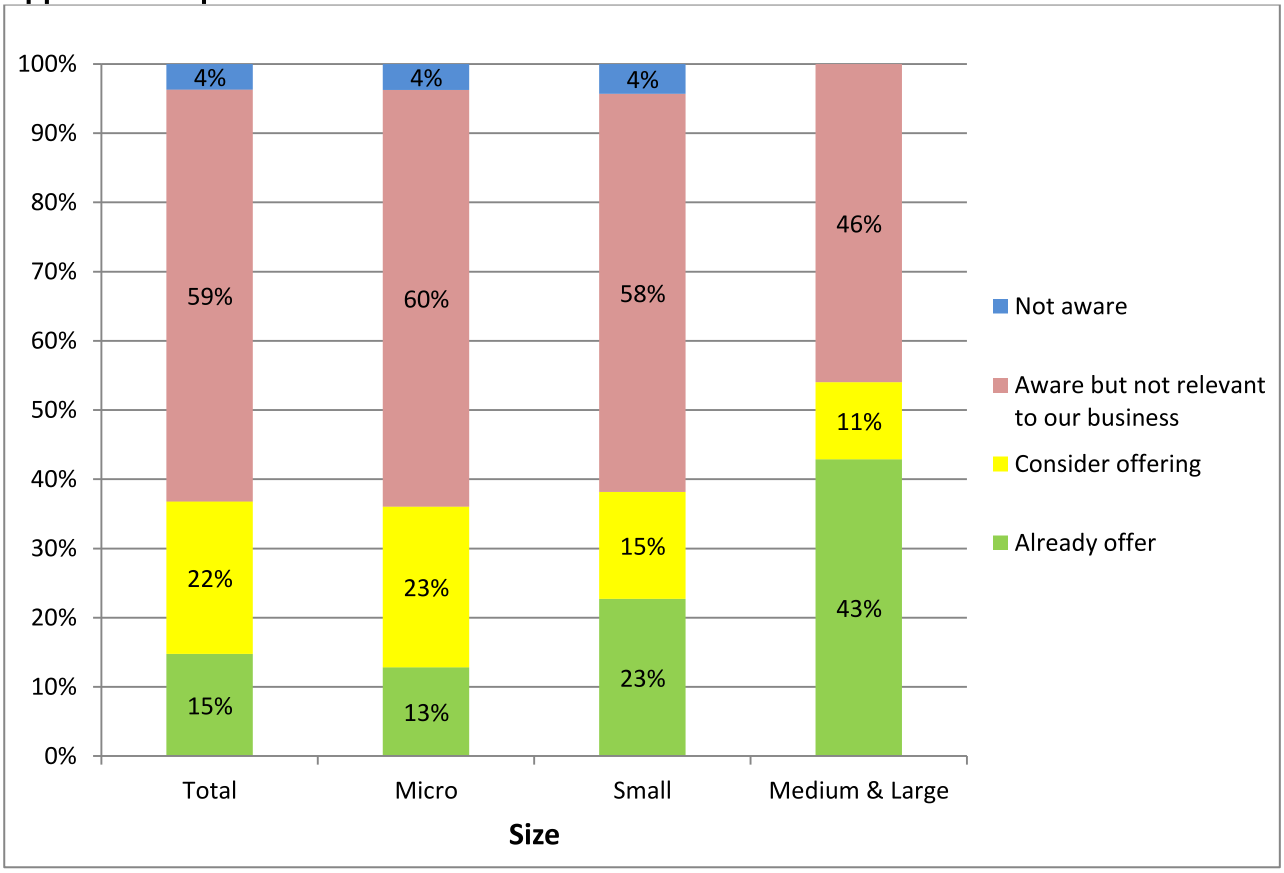
[11] http://www.london.gov.uk/priorities/business-economy/publications/gla-economics/london-business-survey-2014

Those currently offering Apprenticeships in Lambeth are more frequently in the ‘Professional, Scientific and Technical’ (19%), ‘Health’ (17%), ‘Arts, Entertainment, Recreation and Other Services’ (17%) and ‘Production, Construction and Agriculture’ (17%) sectors.

The 22% overall claiming they would consider offering Apprenticeships are most frequently in the ‘Production, Construction and Agriculture’ (32%), ‘Accommodation and Food’ (29%), Arts, Entertainment and Recreation’ (26%) and ‘Business Administration’ (25%) sectors.

As shown in the chart below, involvement and interest in Apprenticeships is higher among larger businesses.

Chart 27 – Does your business already offer, or would you consider offering Apprenticeships?



Weighted base:726 (all respondents)

Currently offering Apprenticeships is significantly more common in the Waterloo CLIP area with 27% in this area already offering Apprenticeships.

Figure 28 – Does your business already offer, or would you consider offering Apprenticeships?

	Overall	Brixton	Clapham	North Lambeth	Norwood	Stockwell	Streatham	Waterloo
Already offer	15%	6%	14%	20%	16%	12%	11%	27%
Considering offering	22%	21%	23%	23%	20%	27%	17%	23%
Aware but not relevant	59%	67%	58%	53%	60%	57%	71%	50%
Not aware	4%	6%	4%	5%	4%	4%	1%	1%

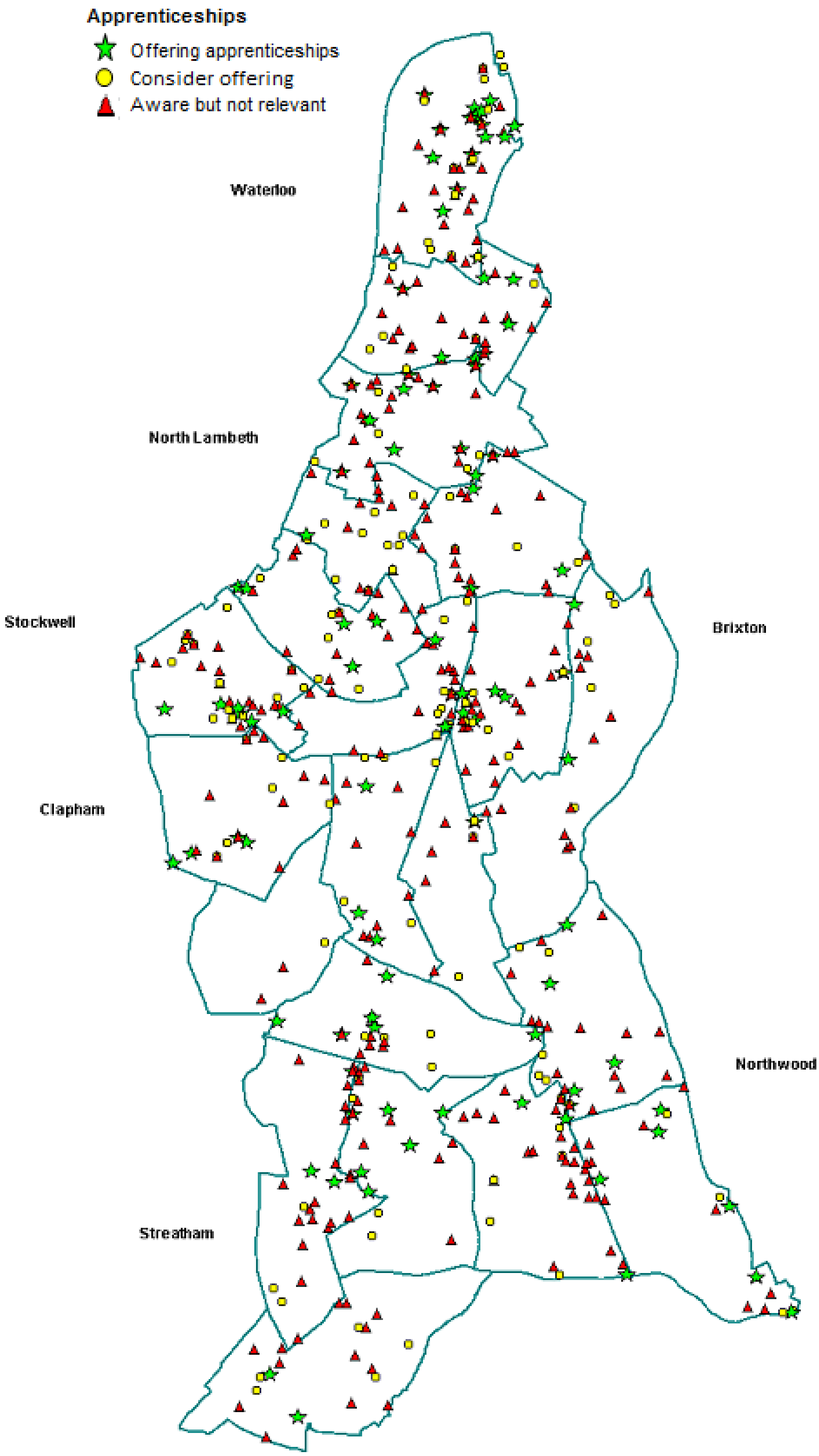
Weighted base:726 (all respondents)

Businesses majority owned by those from White ethnic backgrounds are more likely to currently offer or be considering offering Apprenticeships (14% already offer and 25% would consider offering Apprenticeships). Lower proportions of majority Asian and Black owned businesses (7% and 3% respectively) already offer Apprenticeships. Only 13% of majority Asian owned businesses suggest they will consider offering Apprenticeships in the future with this the case for 25% of each of majority White and Black owned businesses.

Encouragingly half of the businesses suggesting they would consider offering Work Experience placements in the future (51%) would like more information about these schemes.

The map overleaf highlights the location of businesses across the borough currently offering and considering offering Apprenticeships in the future.

Map 15: Does your business already offer, or would you consider offering Apprenticeships?



In 63% of cases, businesses claim these Apprenticeships to lead to people being taken on permanently.

Figure 29 – Do these Apprenticeship schemes lead to people being taken on permanently?

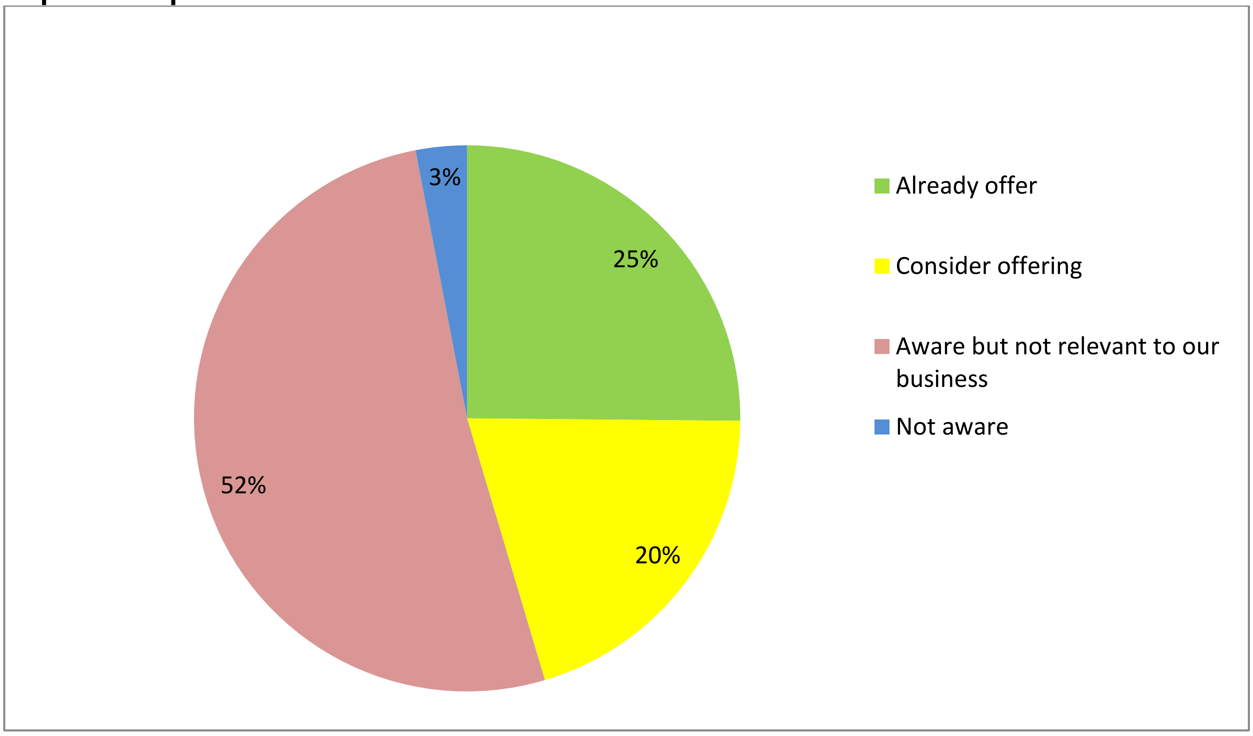
	%
Yes	63%
No	30%
Don't know	7%

Weighted base:107 (businesses offering Apprenticeships)

Apprenticeship schemes leading to people being taken on permanently is most common in larger businesses with all medium large businesses currently offering Apprenticeships suggesting this to be the case, compared with 81% of small and 55% of micro businesses.

One in four businesses (25%) currently offer work experience placements (through schools, colleges, training/work placement agencies).

Chart 28 – Does your business already offer, or would you consider offering Work Experience placements?

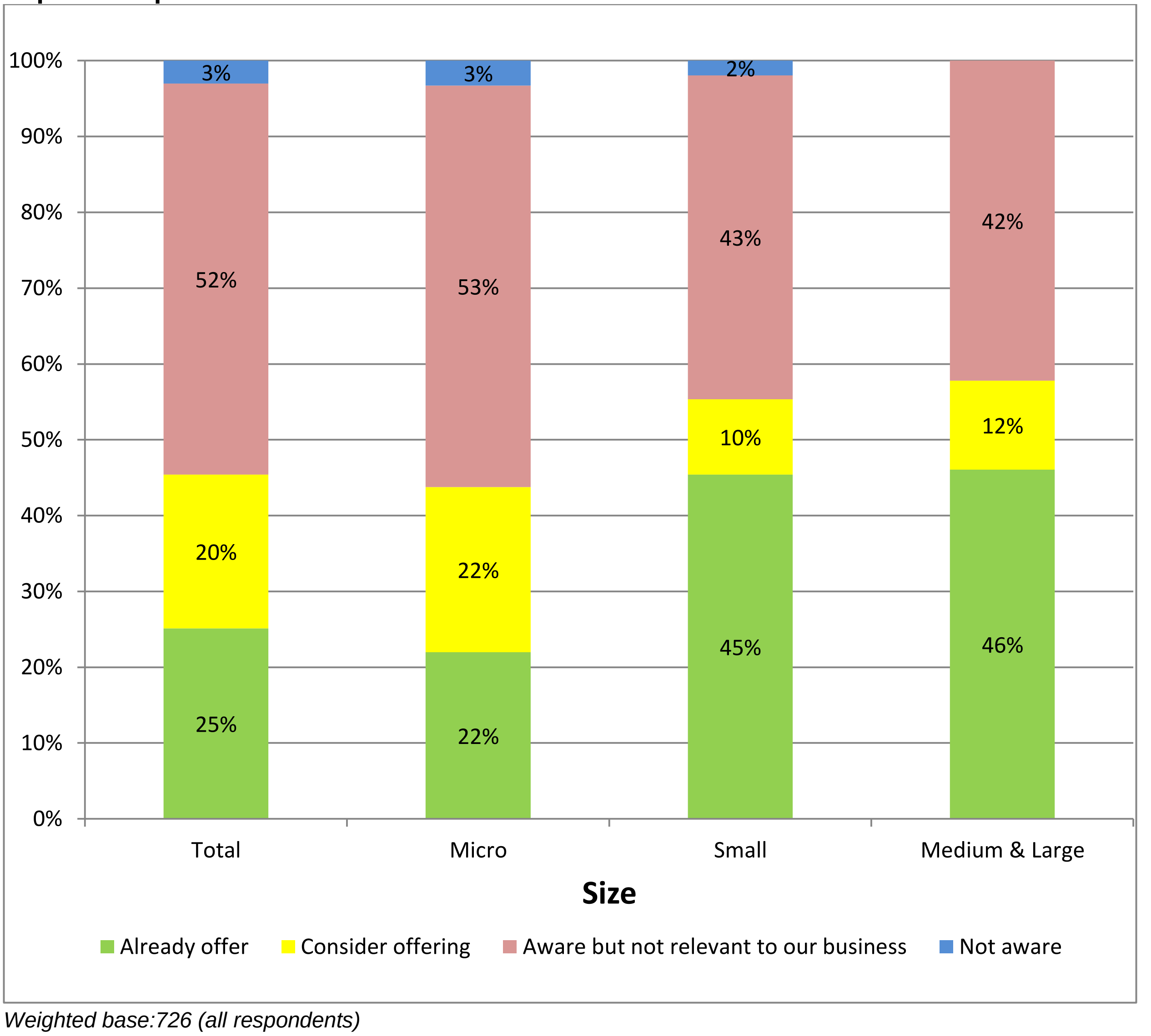


Weighted base:726 (all respondents)

Work experience placements currently being offered is suggested by higher proportions in the 'Education, Health and Public Administration' (40%) and 'Professional, Scientific and Technical' (36%) sectors.

Offering work experience placements is also more common among small (10-49 employees) and medium/large (50+ employees) enterprises.

Chart 29 – Does your business already offer, or would you consider offering Work Experience placements?



Weighted base:726 (all respondents)

Higher proportions of longer established businesses are already offering work experience placements, with those established in Lambeth within the last 5 years more frequently considering this as an option in the future.

Some 29% of those in the 'Production, Construction and Agriculture' and 24% in the 'Business Administration' sectors claim they would consider offering work experience placements in the future.

Figure 30 – Does your business already offer, or would you consider offering Work Experience placements?

	Overall	Brixton	Clapham	North Lambeth	Norwood	Stockwell	Streatham	Waterloo
Already offer	25%	16%	31%	33%	19%	24%	19%	36%
Considering offering	20%	23%	19%	24%	19%	25%	13%	19%
Aware but not relevant	52%	56%	50%	39%	59%	47%	67%	42%
Not aware	3%	6%	1%	4%	4%	4%	1%	3%

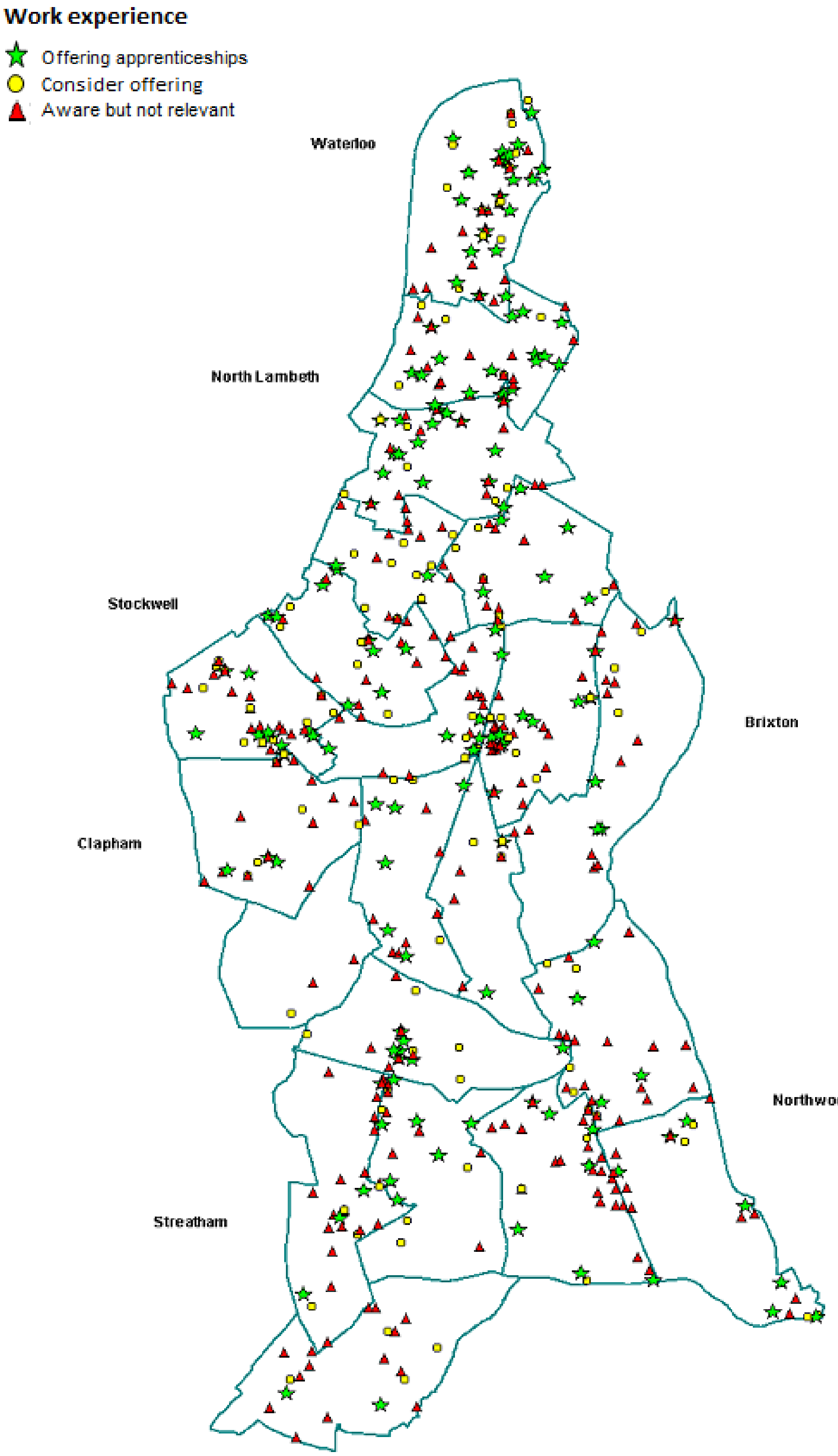
Weighted base:726 (all respondents)

As shown in the table above, businesses in Waterloo and North Lambeth most frequently currently offer work experience placements, with this being lowest amongst Brixton businesses.

Encouragingly half of the businesses suggesting they would consider offering Work Experience placements in the future (51%) would like more information about these schemes.

The map overleaf highlights the location of businesses across the borough currently offering and considering offering Work Experience placements in the future.

Map 16: Does your business already offer, or would you consider offering Work Experience placements?



In 46% of cases, work experience placements are claimed to lead to people being taken on permanently.

Figure 31 – Do these Work Experience schemes lead to people being taken on permanently?

	%
Yes	46%
No	48%
Don't know	6%

Weighted base:182 (businesses offering Work Experience schemes)

As shown in the table above, just under half (48%) of work experience placements do not lead to people being taken on permanently.

Work experience placements in the 'Business Administration' (79%) and 'Health' (69%) most frequently lead to permanent employment.

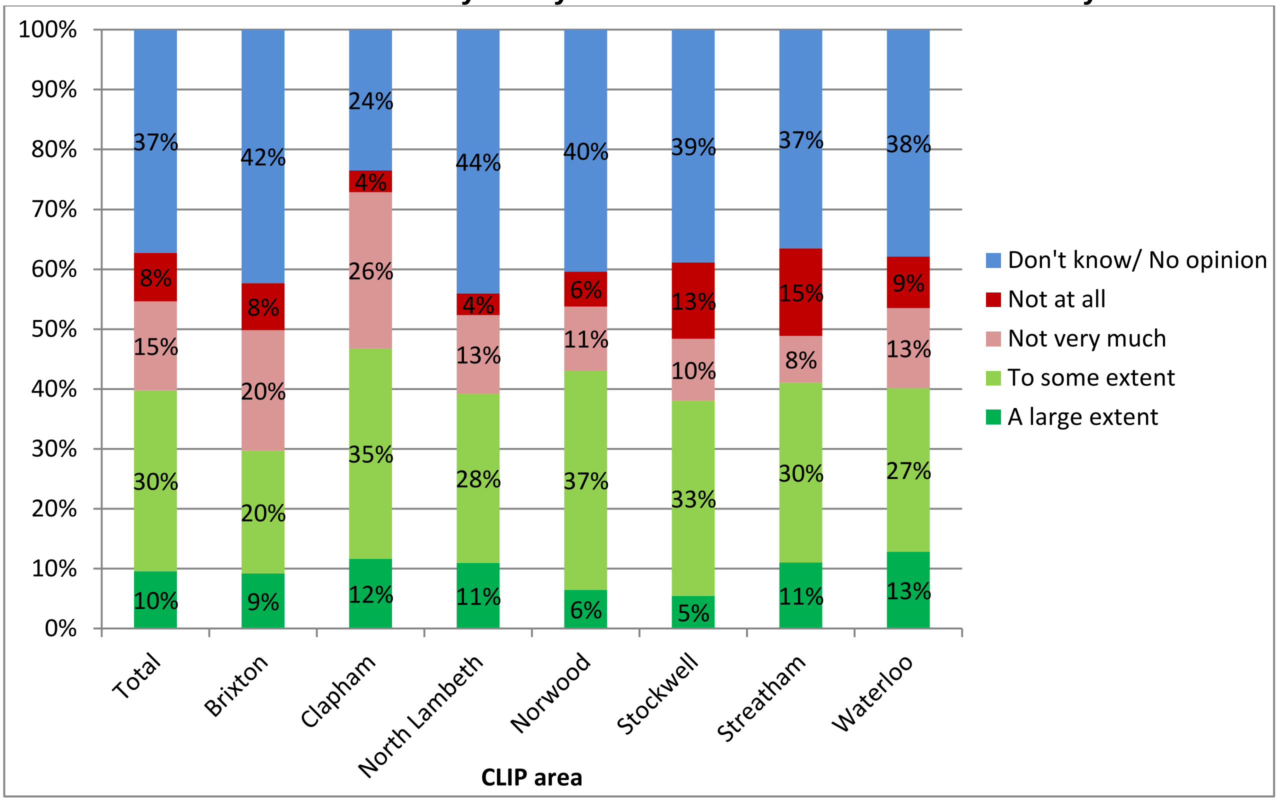
3.5 Business Engagement

- ***Overall, 40% of businesses suggest Lambeth council to be 'business friendly'.***
- ***In discussing what the council could do differently to help their business, highest proportions (14%) referred to addressing parking issues.***
- ***Highest proportions referred to their accountant when asked where they would go should they need help and advice for their business.***
- ***In considering which methods of communication they found most useful in engaging with their customers, suppliers and partners, highest proportions referred to email communication being the most effective (69%) closely followed by telephone contact (60%).***
- ***In considering future engagement between Lambeth Council and the business community, businesses overall most frequently suggested online information and consultation to be the best method to involve them in decisions about the local area.***

Businesses were asked a series of questions focusing on engagement with Lambeth Council, business support, communication and further consultation.

Overall, 40% of businesses suggest Lambeth council to be 'business friendly' (either to a large or some extent) with 15% suggesting the council to be not very and 8% not at all business friendly. More than one third, 37%, are unsure or have no opinion.

Chart 30 – To what extent would you say Lambeth Council is business friendly?

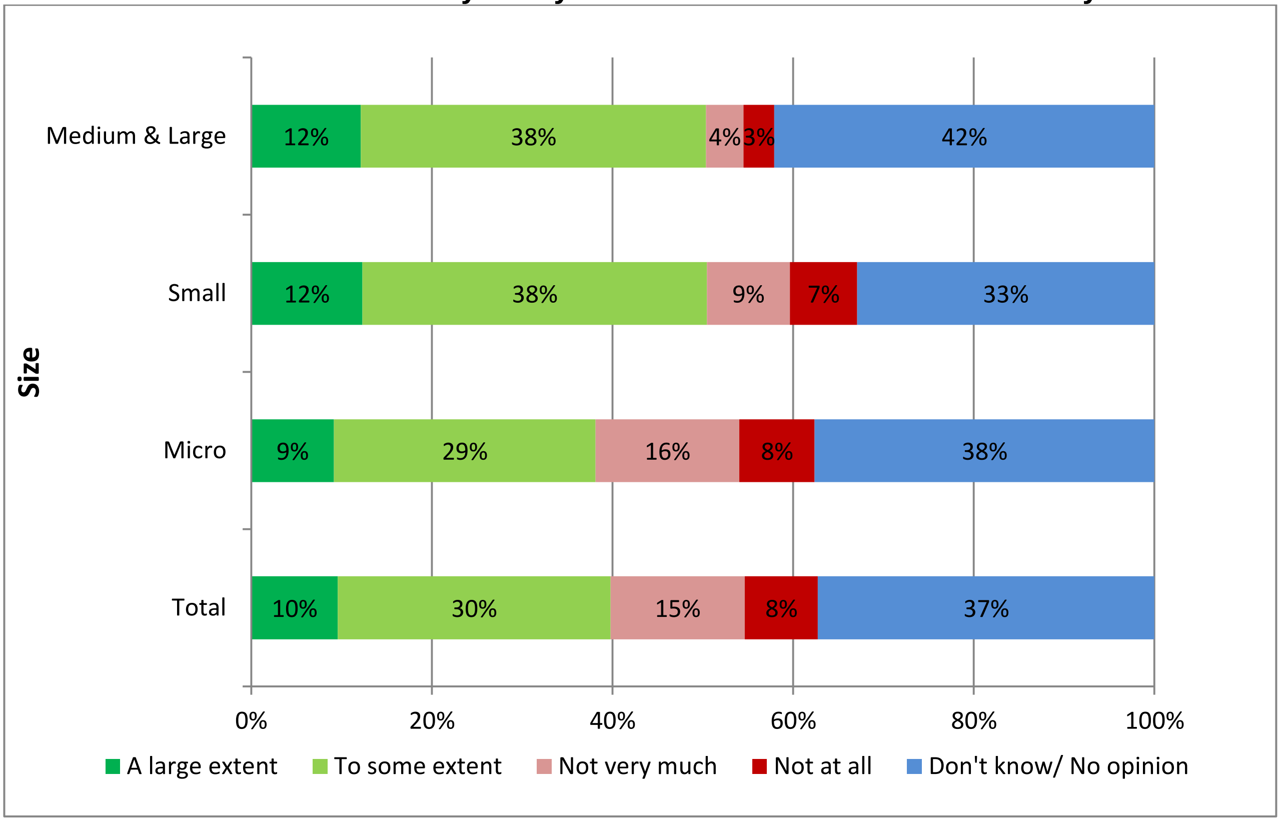


Weighted base:726 (all respondents)

The proportions suggesting the council to be business friendly to at least some extent includes 47% of those in the Clapham and 43% in the Norwood CLIP areas. On the other hand, higher proportions in Clapham (again) and Brixton (30% and 28% respectively) suggested the council to be not very or not at all business friendly.

Small and medium/large enterprises more frequently rate Lambeth council as 'business friendly' as shown in the chart below.

Chart 31 – To what extent would you say Lambeth Council is business friendly?

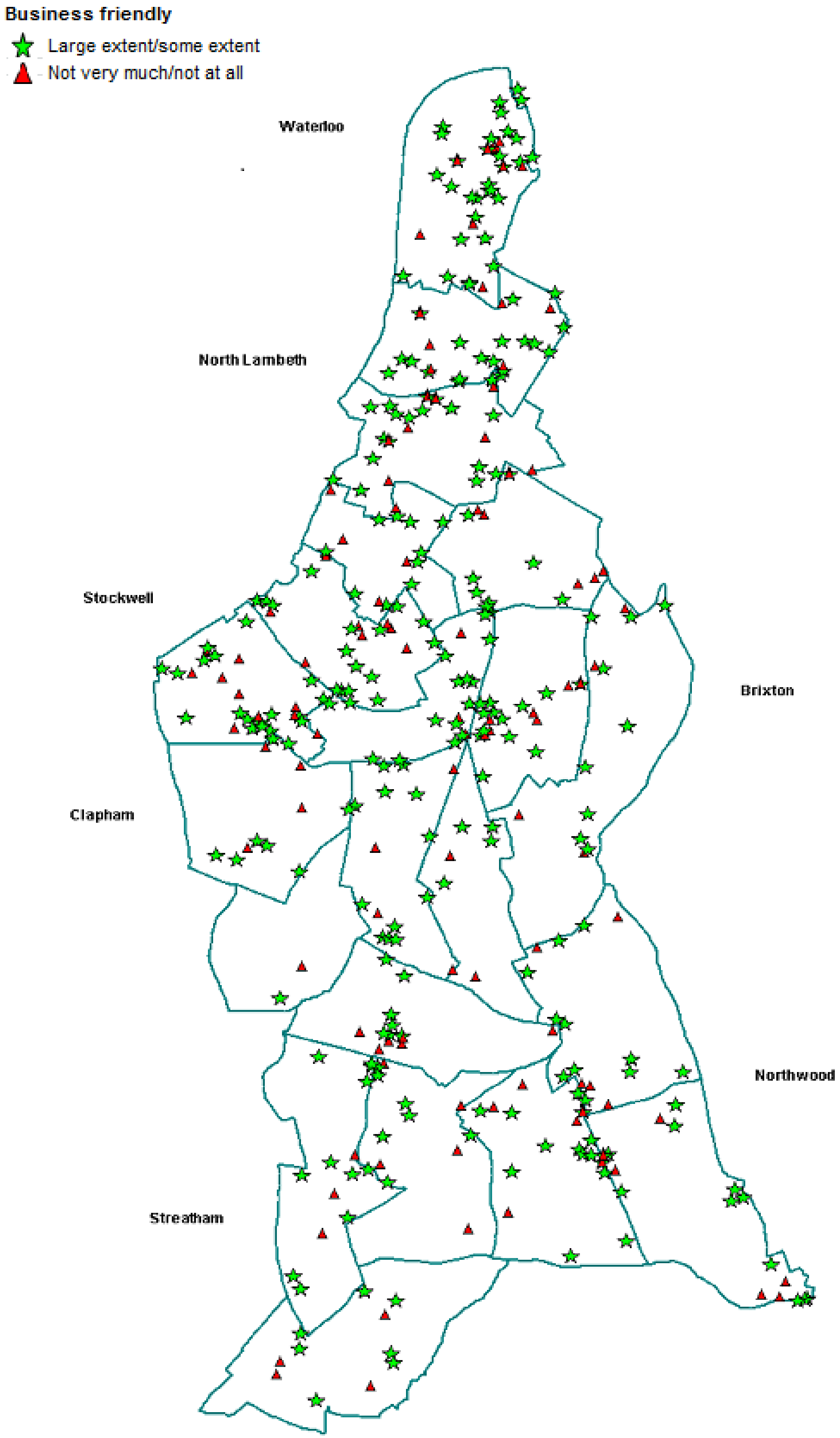


Weighted base:726 (all respondents)

Interestingly, businesses that have been trading in Lambeth for more than 10 years are less positive here than those who have started trading more recently. Some 35% of businesses trading for more than 10 years suggest Lambeth Council to be, at least to some extent, business friendly (compared with 40% overall).

The map overleaf highlights the location of businesses rating Lambeth council as business friendly.

Map 17: To what extent would you say Lambeth Council is business friendly?



What could the council do differently to help your business?

The survey asked businesses if there was anything the council could do to help local businesses to grow and thrive and to help local people to secure viable opportunities in the area.

In discussing what the council could do differently to help their business, highest proportions (14%) refer to addressing parking issues. This is referred to most frequently by businesses in Stockwell (21%) and Streatham (19%) and among businesses in the 'Retail' sector (22%).

Figure 32 – What could the council do differently to help your business?

	%
Parking/address parking issues	14%
Improve communication/keep up to date	12%
Lower business rates/rents	11%
Nothing	9%
Help for small businesses	8%
Advice for businesses/networking/creative hub	6%
Funding for businesses/grants	4%
Improve the image of the area	2%
Reduce rates (commercial)	2%
Improve rubbish collection	2%
Limit number of particular type of businesses in areas	2%
Improve security/more policing	2%
Address anti-social behaviour	2%
Street cleaning	2%
Improve recycling	2%
Make more premises available	1%
Improve planning department/enforcement	1%
Not allow commercial space to become residential	1%
Deal with traffic/congestion issues	1%
More contracts for local businesses	1%
Improve infrastructure	1%
Improve street lighting	1%
Offer/facilitate training	1%
More assistance with staff recruitment	1%
More affordable housing	1%
Improve transport	1%
Quicker decisions/cut bureaucracy	1%
Improve BIDs/consider improvement to how BIDs work	1%
Help with finding premises	<1%
Improve broadband/internet	<1%
Improve licensing	<1%
Don't know/no comments	18%
Other	12%

Weighted base:726 (all respondents)

Some 11% refer to lower business rates and rents with help for small businesses and advice and funding for businesses also discussed by between 6% and 8%.

As shown in the table on the previous page, more than one in ten (12%) businesses refer to improving communication with businesses and keeping them up to date. This is most frequently mentioned by businesses in the Waterloo CLIP area (19%) and by a significantly higher proportion, 20% of those businesses rating Lambeth as either ”not very” or “not at all” business friendly. Some 9% of businesses suggest there is nothing the council could do differently to help their business.

Where do businesses go should they need help and advice for their business?

A specific question was also asked to businesses of where they would go should they need help and advice for their business.

As shown in the table below, highest proportions refer to their accountant, with 14% referring to friends or family members.

Figure 33 – If you were to need help and advice for your business, where would you go/who would you contact for this support?

	%
Accountant	22%
Depends on support/advice required	18%
Family member/friends	14%
Internal/Head Office/Within organisation	11%
Bank	10%
Trade organisation	9%
Government website / Gov.uk (formally business link)	9%
Another business	9%
Solicitor	8%
Don't need/don't seek advice	6%
No-one - have no-one to go to	6%
Other	6%
Business mentor	5%
Financial advisor	5%
Lambeth Council (person or Councillor)	4%
Business networks/BIDs	4%
HMRC	3%
Lambeth Council website	3%
Internet	2%
Professional body	2%
Consultants - internal & external	1%
Chamber of Commerce	1%
Google	1%
Trustees	<1%
Head Office	<1%

Weighted base:726 (all respondents)

Contacting their accountant for help or support is most frequently cited by businesses in the 'Information, communication, Property, Finance and Insurance' (31%), 'Production, Construction and Agriculture' (25%) and 'Professional, Scientific and Technical' (24%) sectors. This is also most likely the case for registered companies and partnerships (26% and 32% respectively referring to an accountant), compared with 13% of sole traders and 12% of not for profit/social enterprise organisations.

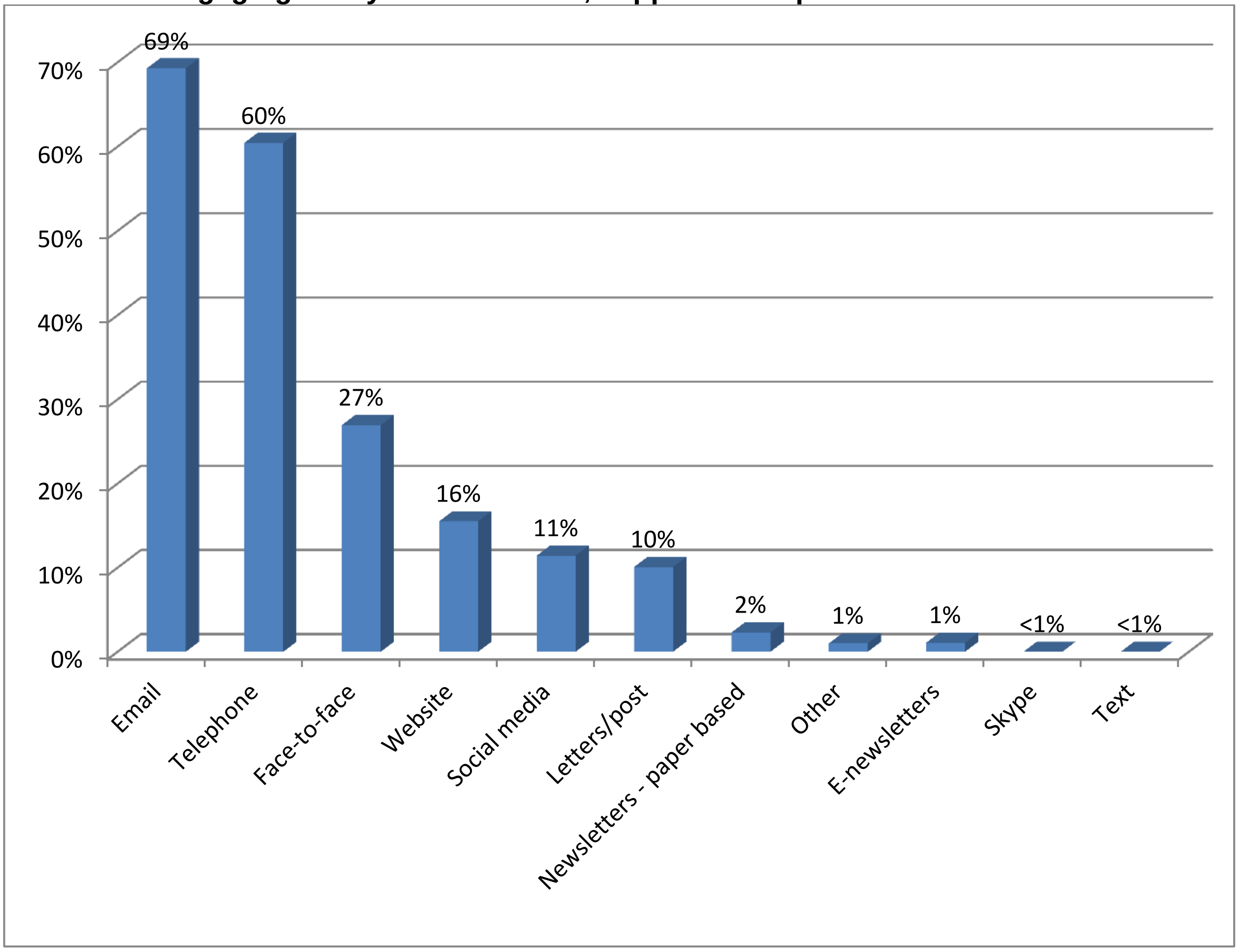
Sole traders more frequently refer to family members/friends (20% compared with 14% overall). Accessing support from friends and family members is also more frequent among businesses in the 'Retail' sector (20%) and businesses majority owned by those from Asian ethnic backgrounds (24%).

Effective methods of communicating with customers, suppliers and partners

In order to better understand methods of communication most appropriate and frequently used by businesses, all businesses were asked which methods of communication they found most useful in engaging with their customers, suppliers and partners.

As shown in the chart below, highest proportions refer to email communication being the most effective (69%) closely followed by telephone contact (60%).

Chart 32 – At the current time, which methods of communication do you find most effective in engaging with your customers, suppliers and partners?



Weighted base:726 (all respondents)

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Along with being the most frequently used communication method overall, email communication is reported to be effective in communicating with customers, suppliers and partners by significantly high proportions of businesses in the ‘Professional, Scientific and Technical’ (84%) and ‘Information, communication, property, finance and insurance’ (78%) sectors, by businesses in the Waterloo area (82%) and by small or micro businesses majority owned by those from White ethnic backgrounds (75%).

In contrast, a significantly lower proportion (46%) of businesses in both the “Wholesale, retail, motor trades and transport” and “Accommodation and Food” sectors, as well as among Asian owned businesses, referred to email as the most effective means of communication.

Communicating by telephone is mentioned as the most effective way of engaging with customers, suppliers and partners by significantly higher proportions of businesses in Brixton (70%), though by a significantly lower proportion of businesses in North Lambeth (46%).

Face-to-face as the most effective means of communicating with customers, suppliers and partners, was referred to by a significantly higher proportion of businesses in the ‘Retail’ sector (46%), compared with 27% overall (with only 42% in the ‘Retail’ sector referring to email as an effective form of communication with their customers, suppliers and partners).

Face-to-face is also reported as the most effective means of communicating by significantly higher proportions of businesses majority owned by those from Asian ethnic backgrounds (40%) as well as by those businesses rating Lambeth as either ”not very” or “not at all” business friendly (35%).

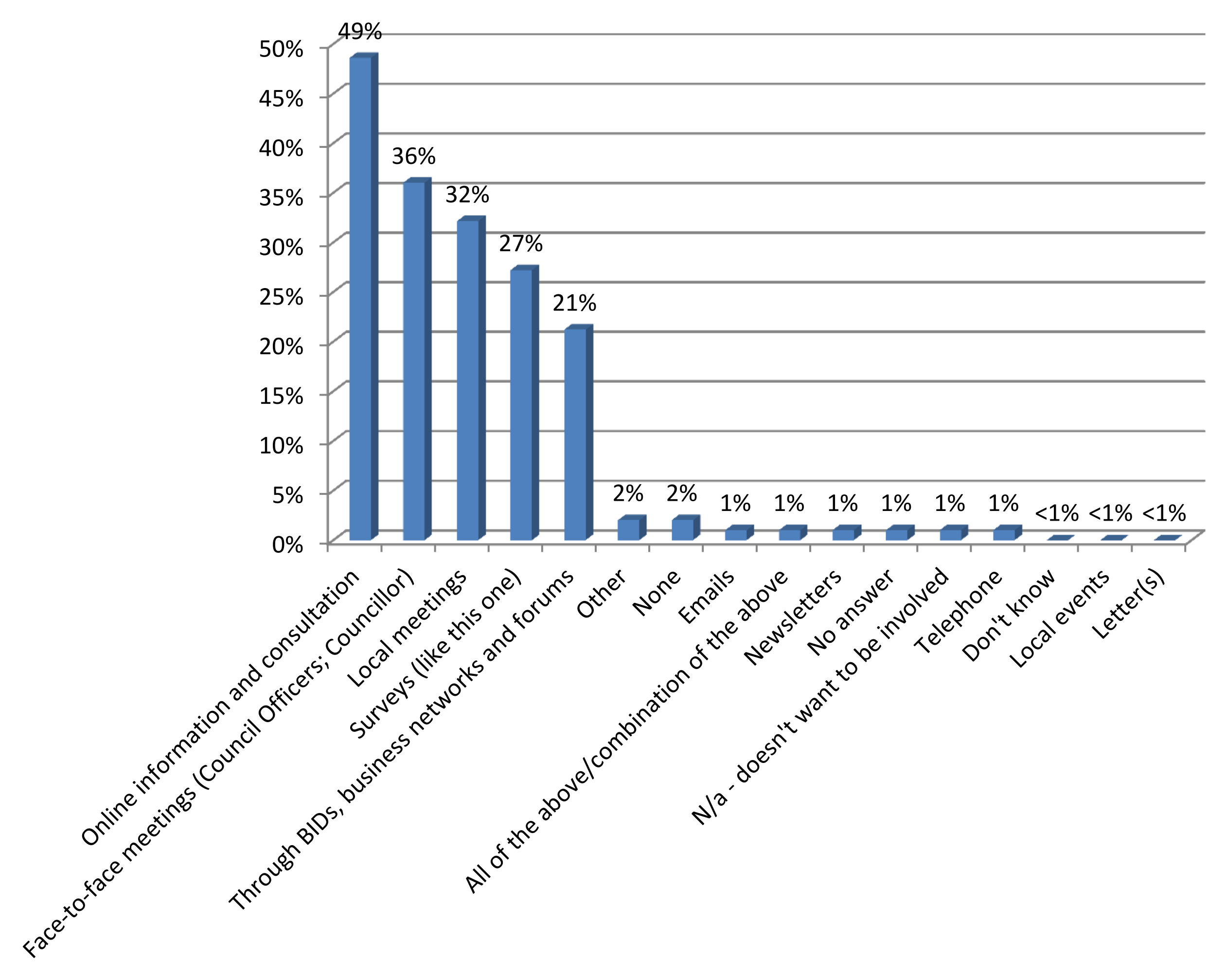
Businesses finding their website to be most useful in engaging with their customers, suppliers and partners was reported by a significantly higher proportion of businesses who had been trading in Lambeth for between one and two years (30%). This is in contrast to significantly lower proportions of businesses in Streatham (8%), micro and small businesses majority owned by those from Asian ethnic backgrounds (7%) and business in the “Retail” sector (7%).

Finding social media to be most useful in engaging with their customers, suppliers and partners was mentioned by nearly a quarter of businesses who had been trading in Lambeth for between one and two years (23%), this being a significantly higher proportion compared to 11% overall.

How can Lambeth Council involve businesses in decisions about the local area?

In considering future engagement between Lambeth Council and the business community, businesses overall most frequently suggest online information and consultation to be the best method to involve them in decisions about the local area.

Chart 33 – How can the council best work with you and the local business community to involve them in decisions about the local area?



Weighted base:726 (all respondents)

Online information and consultation was reported by nearly half (49%) of all businesses, though it was least favoured by significantly lower proportions of micro and small businesses majority owned by those from Black ethnic backgrounds (35%), businesses rating Lambeth as poor/very poor location do businesses (33%) and medium and large businesses (26%),

Face to face meetings (including meetings with Council Officers and Councillors) are a preference for 36% overall, with this being more apparent among a significantly higher proportion, 47%, of those businesses rating Lambeth as either ”not very” or “not at all” business friendly.

Approximately one in three (32%) refer to local meetings, with these being a preference for nearly half (46%) of micro and small businesses majority owned by those from Black ethnic backgrounds,

Around one in four (27%) mentioned surveys such as the Lambeth Business Survey though was less favoured by significantly lower proportions of businesses in Waterloo (16%), those trading in Lambeth for between one and two years (17%) and businesses in the “Accommodation and Food” sector (15%).

Approximately one in five (21%) businesses stated communication through BIDS, business networks and forums to be the best method to involve them in decisions about the local area. This was favoured by significantly lower proportions of businesses in Waterloo (12%), businesses in the “Accommodation and Food” sector (10%) and micro and small businesses majority owned by those from Asian ethnic backgrounds (9%).

Encouragingly, some 58% of businesses taking part in the survey said they were happy to be contacted or invited to take part in further research.

4.0 Conclusions and Recommendations

Lambeth as a business location

Six out of ten, 61% of businesses rated Lambeth as a ‘good’ or ‘very good’ place to do business with this significantly higher than the proportion reporting this in 2011 of 38%. On an equally positive note only 6% of businesses surveyed rated Lambeth as ‘poor’ or ‘very poor’ as a place to do business, with this significantly lower than that recorded in the 2011 Lambeth Business Survey of 22%.

Being ‘near to good transport links’, it being a generally ‘good location’ and being ‘close to central London’ were the three most spontaneously mentioned strengths of Lambeth as a business location.

Encouragingly, almost one third (31%) of business said there were no limitations to Lambeth as a business location when asked spontaneously. Parking was referred to by one in five businesses spontaneously as a limitation, with this issue also rated as the most significant challenge for businesses in the area from a prompted list. Commercial rents and business rates is the second most frequently mentioned challenge for businesses with market sector/competition being the third most frequently mentioned challenge.

Only one in four businesses located within BID areas agreed or strongly agreed that being located in the BID area had positively benefitted their business. It was not possible within the constraints of this research to survey sufficiently large enough samples of businesses within each of the separate six BID areas to determine how the views of businesses might vary between the different BIDs. Therefore, further research into the reasons behind this would be beneficial in understanding businesses experiences of being located within BID areas.

Almost half (48%) of businesses have been trading in the borough for more than 10 years with 13% having started trading in the borough within the last 2 years. It being a good and convenient location and knowing the area well are the cited as the main attractions to setting up a business in Lambeth.

Business Objectives

Whilst an encouraging 85% of businesses surveyed expect to be trading in Lambeth in 3 years time, 10% suggest this to be unlikely or very unlikely. In considering why they did not expect to be trading in Lambeth in 3 years time, highest proportions of businesses referred to relocating or moving to a different area. Further analysis/research to consider and understand reasons why these businesses are unlikely to be trading in the area in 3 years time would be beneficial, in-line with trying to work with these businesses to help/support them to continue trading in Lambeth in the future where possible.

Over six out of ten have objectives to grow their business over the next 3 years with a further third saying their objective is to maintain the business roughly as it is. Overall only 3% expect to reduce the scale of their operations. Business objectives appear to have remained stable over the period since the 2011 Lambeth Business Survey, where 60% expected to see growth and 5% a reduction in the scale of their operations.

Employment

The majority of businesses surveyed (representing the population of the borough) are micro enterprises with between 0 and 9 employees.

In considering change in employment numbers over the last 12 months, the position in Lambeth is very good with one in five (20%) businesses claiming the number of employees at their business to have increased with only 7% reporting a decrease over this period. This shows a significant improvement on the position reported in the 2011 Lambeth Business Survey where 14% referred to staff numbers having increased and 19% decreased in the preceding year. This is also positive in comparison to findings in the 2014 London Business Survey where 13% reported an increase over this period and 12% a decrease.

It is also encouraging that almost one in three (30%) of businesses expect to see an increase in staff numbers over the next 12 months with only 2% overall expecting to see a decrease. This again highlights a significant improvement on the 2011 picture where 14% of Lambeth Business Survey respondents expected to see an increase and 19% a decrease in employee numbers in the following year. Again, this is also positive in comparison to findings in the 2014 London Business Survey where 22% expect to see an increase over this period and 3% a decrease.

There does not appear to be significant skills issues in Lambeth workforce at the current time with the majority (82%) of businesses suggesting there were no skills gaps or were unable to identify particular skills lacking in their current workforce. Where skills were lacking this was most frequently seen to be job specific skills (job related skills such as plumbing, engineering, design, fundraising and photography).

Some 15% of businesses currently offer Apprenticeships with a further 22% considering doing so in the future. Businesses in the 'Production', 'Accommodation and Food', 'Arts' and 'Business Administration' sectors are the sectors where higher proportions are considering offering apprenticeships and so targeting resources to encourage these businesses to take these plans forward would be beneficial.

In almost two thirds of cases, Apprenticeships offered by these employers lead to people being taken on permanently. All medium and large businesses (those with 50 or more employees) offering apprenticeships say they are likely to lead to people being taken on permanently with this the case for 55% of micro (0-9 employees) and 81% of small (10-49 employees) businesses. It would therefore be worth understanding the possible barriers and to learn what would help potentially including ways to mentor micro businesses who offer Apprenticeships through the process to try to help/encourage or enable them to make these positions more permanent.

One in four businesses currently offer work experience placements (through schools, colleges, training/work placement agencies). In just under half of these (46%), work experience placements are claimed to lead to people being taken on permanently. This appears to be a strong and successful method of getting people into work. Higher proportions of longer established businesses are already offering work experience placements, with those established in Lambeth within the last 5 years more frequently considering this as an option in the future. Targeting less established businesses to support them to take forward their plans to offer work experience may therefore be a way to continue the success of securing employment in Lambeth through these processes.

Recruitment

In considering the methods they used to recruit staff, more than one in three (35%) businesses surveyed referred to word of mouth. Three quarters of businesses suggest there to be no challenges to recruitment at the current time with a lack of applicants with the required skills being the challenge most frequently discussed.

Business Engagement

Four out of ten businesses suggest Lambeth Council to be ‘business friendly’ with one in four (23%) claiming the Council to be either ‘not very much’ or ‘not at all’ business friendly (8%). Over a third (37%) of businesses either did not know or held no opinion. Further analysis/research may be useful to further understand the reasons for businesses holding these views in order to increase business satisfaction with the council.

To improve communications between businesses and the council, consideration needs to be made to businesses differing preferences for contact methods. In discussing which methods of communication they found most useful in engaging with their customers, suppliers and partners, highest proportions referred to email communication being the most effective closely followed by telephone contact though more than one in four businesses highlighted face-to-face contact.

In line with this in considering future engagement between Lambeth Council and the business community, businesses overall most frequently suggested online information and consultation to be the best method. Though noting it was less favoured, for example, by significantly lower proportions of micro and small businesses majority owned by those from Black ethnic backgrounds and businesses rating Lambeth as a “poor” or “very poor” location to do business,

Other methods mentioned included face-to-face meetings with Councillors and Council Officers and local meetings, with this being more apparent among a significantly higher proportion, 47% of those businesses rating Lambeth as either ”not very” or “not at all” business friendly,

Further detailed analysis is however required here in order to ensure bespoke offers are made dependent on business requirements. For example, whilst email is most frequently discussed as the most effective form of communication overall, retail businesses and businesses majority owned by those from Asian backgrounds refer to this much less frequently. Face-to-face consultation is much more favourable for businesses in these categories.

Appendix 1 – Business Methodology

Surveys were completed by telephone and face-to-face with business owners/managers across the Lambeth area. Interviews lasted between 13 and 45 minutes with an average interview lasting around 19 minutes.

Fieldwork took place between 21st January and 20th February 2015.

Interviews were completed with the business owner/manager to ensure accurate data was achieved.

A total of 726 interviews were completed with businesses. 684 were completed by telephone and 42 were completed face-to-face. Initial contact was made with all businesses (where possible) by telephone with face-to-face interviews arranged on request of business owner/managers.

The achieved sample size of 726 gives a margin of error of ±3.5% at the 5% confidence level. This increase in sample size from 2011 (where 403 interviews were completed) improves the reliability of the survey data (margin of error in 2011 was ±4.9% at the 5% level).

As far as possible the methodology used in previous waves of the Lambeth Business Survey has been followed to allow for reliable comparisons to be made over time.

However, in order for comparisons to be made between Co-operative Local Investment Plan (CLIP) areas and to ensure samples within each of these were robust for analysis, quotas were set to ensure a minimum of 100 interviews were completed with businesses in each CLIP area. This is a slightly different approach to that followed in the 2011 Lambeth Business Survey where quotas were set by area to broadly represent the population across the area.

Quotas were also set by Sector and Size (as in 2011) to ensure reliable data was obtained from a sample of businesses representative of the borough by Sector and Size.

Quotas were therefore set using ONS UK Business Activity data on Sector and Size (based on employee counts). These records contain business data for 16,915 business units in Lambeth.

Due to the knowledge that a large number of businesses were registered at one particular address in the North of the borough (Bishop's Ward) between 2013 and 2014, ONS population data has been adjusted. Examination of sector change data provided good evidence that the multiple registrations at one address in the North of the borough would affect two sectors in particular. Analysis of data also suggests the majority of these multiple registrations fall within the micro size category (0-9 employees).

The table below details the population numbers/percentages and achieved sample numbers/percentages by Sector and Size.

	Population % *	Number of interviews achieved	Achieved sample %
Sector			
Agriculture	.1%	1	<1%
Production	2.6%	24	3%
Construction	5.6%	35	5%
Motor Trades	1.0%	19	3%
Wholesale	3.0%	9	1%
Retail	8.5%	98	14%
Transport and Storage	1.7%	17	2%
Accommodation and food	7.8%	82	11%
Information and communication	14.6%	53	7%
Finance and Insurance	1.5%	10	1%
Property	3.6%	26	4%
Professional, scientific and technical	23.0%	113	16%
Business Administration and Support Services	8.5%	41	6%
Public Administration and Defence	.8%	1	<1%
Education	2.4%	28	4%
Health	6.1%	49	7%
Arts, Entertainment, Recreation and Other Services	9.2%	120	17%
Size			
Micro (0-9 employees)	86.1%	545	75.1%
Small (10-49 employees)	11.2%	151	20.8%
Medium (50-249 employees)	2.4%	28	3.9%
Large (250+ employees)	0.4%	2	0.3%

*Population figures are based on adjusted ONS data

Further methodological issues around weighting of data were also considered. Whilst ONS data does not provide breakdowns of businesses by Sector and Size at a level lower than borough level, data is accessible regarding the population of businesses in the borough by CLIP and neighbourhood area. It would therefore be possible to also weight data by area to ensure survey data is representative of the borough by Sector, Size and Geography.

However, following the methodology used in the 2011 Lambeth Business Survey (to allow for reliable comparisons to be made) data in this report is weighted only by Sector and Size to represent the business population of the borough.

Throughout the report, statistically significant differences are highlighted where differences are significant to the overall sample at the 5% level. This means that the difference recorded is more than what may occur through sampling area or random chance.

Cross tabulations of the survey findings are provided as a separate document. Statistically significant differences are highlighted in these tables using colour coding.

Appendix 2

The tables below highlight the wards included within each of the CLIP and Neighbourhood areas.

Co-operative Local Investment Plans (CLIPs) to Wards

CLIP Area	Wards within CLIP
Brixton	Brixton Hill, Coldharbour, Herne Hill, Tulse Hill
Clapham	Clapham Common, Clapham Town, Ferndale, Thornton
North Lambeth	Oval, Prince’s
Norwood	Gipsy Hill, Knight’s Hill, Thurlow Park
Stockwell	Larkhall, Stockwell, Vassall
Streatham	St Leonard’s, Streatham Hill, Streatham South, Streatham Wells
Waterloo	Bishop’s

Neighbourhoods to Wards

Neighbourhood Area	Wards within Neighbourhood
Brixton	Brixton Hill, Coldharbour, Herne Hill, Tulse Hill
Clapham	Clapham Common, Clapham Town, Ferndale, Larkhall, Thornton
North Lambeth	Bishop’s, Oval, Prince’s, Stockwell, Vassall
Norwood	Gipsy Hill, Knight’s Hill, Thurlow Park
Streatham	St Leonard’s, Streatham Hill, Streatham South, Streatham Wells

Appendix 3 – Marked Up Questionnaire

A3.	**Does the business fit into any of the following categories… PLEASE READ OUT AND CODE ALL THAT APPLY** **Weighted base = 726 (all respondents)**	
	Registered company (Limited or PLC)	***67%***
	Unregistered business (not registered for VAT, not operating a PAYE system or not registered at companies house)	***1%***
	Sole trader	***24%***
	Partnership	***5%***
	A public sector body	***<1%***
	A social enterprise	***<1%***
	A not for profit organisation	***5%***
	None of these	***1%***
A4.	**How long has this business been trading in Lambeth?** **Weighted base = 726 (all respondents)**	
	Less than 1 year	***5%***
	1-2 years	***8%***
	2-5 years	***20%***
	5-10 years	***19%***
	More than 10 years	***48%***
A4b.	**When you started trading in Lambeth, did you move from another location outside of the borough or did the business start-up at this point?** **Weighted base = 92 (businesses who started trading within the last 2 years)**	
	Relocated from another location	***37%***
	Established within the last 2 years	***63%***
A4c.	**And why did you choose this location for your business? INTERVIEWER PROBE FULLY** **Weighted base = 92 (businesses who started trading within the last 2 years)**	
	Being familiar with the area/knowing the area well/living in Lambeth	***41%***
	Convenient Location	***13%***
	A good location	***14%***
	Busy location/passing trade	***7%***
	Transport links/near tube station	***6%***
	Availability of premises	***5%***
	Cost of premises/cheaper property than previous location	***2%***
	Purchased business that was here	***3%***
	Quality of premises	***2%***
	Up and coming area	***2%***
	Proximity to where staff live	***2%***
	Size of premises	***1%***

	Head office decision	*<1%*
	Other	*13%*
	Don't know	*1%*
A5.	**How likely are you to be trading in Lambeth in 3 years time?** **Weighted base = 726 (all respondents)**	
	Very likely	*66%*
	Likely	*19%*
	Not likely	*5%*
	Very Unlikely	*5%*
	Don't know	*6%*
A5b.	**Why do you say that? (PROBE FULLY)** **Weighted base = 110 (businesses who are not likely, very unlikely or unsure whether they will be trading in Lambeth in 3 years time)**	
	Relocation/moving to a different area	*26%*
	Retirement/the business will be closing down	*16%*
	Other	*15%*
	Landlord having asked them to move due to renovation	*8%*
	Business is declining	*6%*
	Business rent increases	*5%*
	Don't know	*5%*
	Current building being knocked down	*4%*
	Business rate increases/rent increases	*3%*
	Business rate increases	*3%*
	Council issues/lack of support	*3%*
	Needing more space	*3%*
	House prices	*2%*
	Parking	*2%*
	Council issues	*2%*
	The number of similar businesses opening in the area/ competition	*2%*
	Dependent on funding	*1%*
	Uncertainty over premises	*1%*

Section B – Business Economy and Aspirations

The next set of questions focus on your views on the area as a place to do business, any challenges you face and your business aspirations for the future.

B1.	**On a scale of 1 to 5 with 1 being very good and 5 being very poor, how do you rate Lambeth as a place to do business?** **Weighted base = 726 (all respondents)**

	Very good	*19%*
	Good	*42%*
	Average	*33%*
	Poor	*4%*
	Very poor	*2%*
B2.	**What are the strengths of Lambeth as a business location? (PROBE FULLY)** **Weighted base = 726**	
	Near to good transport links	*30%*
	It's a good location	*29%*
	Close to Central London	*21%*
	Good customer base	*11%*
	Diverse Area/multicultural	*7%*
	None	*6%*
	Community spirit/lively community	*5%*
	Close to amenities	*4%*
	Other	*4%*
	Don't know	*3%*
	Inexpensive space/reasonable prices	*2%*
	Council approachable/supportive/communication good	*2%*
	Business not dependent on location	*2%*
	Know the area/live locally	*2%*
	Business rates/rents a positive	*2%*
	No comment	*2%*
	Large population/residential area	*1%*
	Area rundown/going downhill	*1%*
	Area is improving	*1%*
	Rise in new/younger customers	*1%*
	Maintaining business growth in the area	*<1%*
	New businesses opening bringing new customers	*<1%*
B3.	**And are there any limitations to Lambeth as a business location? (PROBE FULLY)** **Weighted base = 726**	
	None	*31%*
	Lack of parking facilities	*20%*
	Other	*10%*
	No comment	*6%*
	Congestion/traffic	*5%*
	Business rates	*5%*

	Lack of office space/difficult to find commercial premises	*4%*
	Crime/anti-social behaviour	*3%*
	Need more shops/amenities	*3%*
	Competition - too many similar businesses in the area	*3%*
	Waste collections/recycling	*3%*
	Area run down	*3%*
	The Council/Bureaucracy	*3%*
	Rents too high	*3%*
	Litter	*2%*
	Reputation of the area	*2%*
	Distance from tube line/station	*2%*
	Quiet location/not many people	*1%*
	Poor security/lack of policing	*1%*
	Accessibility for deliveries	*1%*
	Lack of support for small businesses	*1%*
	Lack of business networks	*1%*
	Business premises becoming residential	*1%*
	Property prices/housing costs too high	*1%*
	Transport delays/closures	*1%*
	Need cycle routes/improve cycling provision	*1%*
	Lack of space for business meetings	*<1%*
	Low income area	*<1%*
	Yes but not specified	*<1%*
	High turnover of population	*<1%*
	Congestion charges	*<1%*

B4. **FOR BUSINESSES IN BID AREAS ONLY**
We understand your business is located within a BID (Business Improvement District) area. To what extent do you agree that being in this BID area has positively benefitted your business? **Weighted base = 208 (those located in a BID area)**

	Strongly agree	*5%*
	Agree	*19%*
	Neither agree or disagree	*19%*
	Disagree	*14%*
	Strongly disagree	*14%*
	Don't know	*13%*
	Not aware of BID area	*17%*

B5. **Over the last 12 months, what percentage of your sales of goods and services was to customers based in…** **Weighted base = 691 (all respondents excluding don't knows)**

		Minimum	Maximum	Average

	Lambeth	*0%*	*100%*	*37%*
	Elsewhere in Greater London	*0%*	*100%*	*39%*
	Elsewhere in the UK	*0%*	*100%*	*14%*
	Europe (excluding the UK)	*0%*	*100%*	*4%*
	Rest of the World	*0%*	*100%*	*5%*

B6.	**Over the last 12 months, what percentage of your purchases of goods and services came from suppliers based in…** **Weighted base = 691 (all respondents excluding don't knows)**			
		Minimum	Maximum	Average
	Lambeth	*0%*	*100%*	*26%*
	Elsewhere in Greater London	*0%*	*100%*	*36%*
	Elsewhere in the UK	*0%*	*100%*	*28%*
	Europe (excluding the UK)	*0%*	*100%*	*5%*
	Rest of the World	*0%*	*100%*	*3%*

B7a.	**I'd now like to ask about any challenges facing your business. Would you say any of the following are challenges that affect your business aspirations? (READ OUT AND CODE ALL THAT APPLY) ROTATE ORDER** **Weighted base = 726**		
B7b.	**And of those mentioned, which three are the biggest challenges?** **Weighted base = 649 (those who mentioned a challenge at B7a)**		
		B7a.	**B7b.**
	Parking for customers	*48%*	*41%*
	Commercial rents/ business rates	*37%*	*30%*
	Market sector/competition	*32%*	*23%*
	Crime/Anti-social behaviour	*27%*	*19%*
	Deliveries /unloading	*25%*	*14%*
	Government Regulations	*23%*	*12%*
	Housing property prices	*22%*	*11%*
	Broadband/digital infrastructure	*20%*	*12%*
	Demand for products and/ or services	*20%*	*9%*
	Staff costs	*20%*	*8%*
	Premises/availability of premises	*20%*	*13%*
	Access to finance	*16%*	*11%*
	Availability of skills	*16%*	*8%*
	Quality of staff	*15%*	*8%*
	Transport	*14%*	*8%*
	Don't know/ None	*11%*	*1%*
	Other	*6%*	*5%*
	Parking at customer's premises	*1%*	*1%*
	Planning policy/licencing	*1%*	*0%*
	Dirty streets	*<1%*	*0%*
	Waste collection/recycling	*<1%*	*<1%*

B7c.	**Which of the following best describes the objectives of your business over the next 3 years? Weighted base = 726 (all respondents)**	
	To grow slowly and gradually get bigger	*47%*
	To maintain the business roughly as it is	*33%*
	To grow to become a much larger business	*14%*
	To reduce the scale of your operations	*3%*
	Don't know	*2%*

B8. **On a scale of 1 to 5, where 1 is strongly agree and 5 is strongly disagree, how far do you agree or disagree with the following statements? Weighted base = 726 (all respondents)**

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	No reply
Our business monitors energy consumption and sets targets for reduction	*14%*	*30%*	*19%*	*23%*	*9%*	*5%*
We segregate waste and recycling where possible	*44%*	*40%*	*6%*	*5%*	*3%*	*2%*
We currently use green or renewable energy sources as part or all of our energy consumption	*8%*	*14%*	*18%*	*40%*	*14%*	*6%*

Section C – Employment

I'm now going to ask you some questions about your workforce and skills.

C1.	**Including yourself, how many members of staff work at this site/location? Please include any owners or managers, but exclude sub-contractors. PLEASE TYPE IN NUMBER AND CODE TO THE LIST BELOW Weighted base = 726 (all respondents)**	
	Type in NUMBER	
	Micro (0-9)	*87%*
	Small (10-49)	*11%*
	Medium (50-249)	*3%*
	Large (250+)	*<1%*
C2.	**Over the past 12 months, has the number of staff employed at this site... Weighted base = 726 (all respondents)**	
	Increased	*20%*
	Decreased	*7%*
	Stayed about the same	*72%*
	Don't know	*1%*

C3.	**Over the next 12 months, do you expect the number of staff employed at this site to…** Weighted base = 726 (all respondents)	
	Increase	*30%*
	Decrease	*2%*
	Stay about the same	*64%*
	Don't know	*4%*

C5.	**Are there any skills you would say are lacking in your current workforce? INTERVIEWER – PLEASE PROBE FULLY AND TYPE IN** Weighted base = 726	
	None	*57%*
	Don't know/no opinion	*25%*
	Job specific skills	*6%*
	Other	*4%*
	IT/computer skills	*3%*
	Sales/marketing skills	*2%*
	Leadership and management skills	*1%*
	Customer service skills	*1%*
	Administration	*1%*
	Multiple languages lacking	*1%*
	Numeracy skills	*<1%*
	Health and safety	*<1%*
	Literacy skills	*<1%*
	English skills lacking	*<1%*
	First Aid	*<1%*

C6.	**C6-C10 ARE FOR MICRO AND SMALL BUSINESSES ONLY (Codes 1 and 2 @ C1)** The next questions relate to the gender, ethnicity and disability status of the owner(s) of your business. By asking these questions we are able to judge the extent to which people from particular groups are represented among business owners compared with the population as a whole. **How many owners or partners does your business have?** Weighted base = 705 (Micro and small businesses) *Range = 1 – 80* *Average = 1.6 owners/partners*	
C7.	**And of these owners/partners, how many are…** Weighted base = 640 (Micro and small businesses excluding don't knows)	
	Male	*Range = 0-41* *Average = 1.1*

	Female	***Range = 0-39*** ***Average = 0.5***
C8.	**And would you mind telling me which ethnic group(s) the owner(s) or partner(s) belong to?** **Weighted base = 640 (Micro and small businesses excluding don't knows)** *(Type in number)*	
	White	***Range = 0-74*** ***Average = 1.16***
	Black	***Range = 0-7*** ***Average = 0.13***
	Asian	***Range = 0-5*** ***Average = 0.14***
	Mixed/other	***Range = 0-4*** ***Average = 0.12***
C9.	**How many of your owners/partners are disabled? (Under the definition in the 1995 Disability Discrimination Act a disability is defined as a physical or mental impairment which has a substantial and long term adverse effect on the ability to carry out day to day activities)** *(Type in number)* **Weighted base = 640 (Micro and small businesses excluding don't knows)**	
	Disabled	***Range = 0-2***
C10.	**And how many of the business owner(s)/partner(s) …** **Weighted base = 640 (Micro and small businesses excluding don't knows)**	
	Live within the Borough of Lambeth	***Range = 0-25*** ***Average = 0.7***

Section D – Recruitment

I'm now going to move on to ask a few questions about staff recruitment.

D1.	**ASK ALL What methods do you use to recruit staff? INTERVIEWER – PLEASE PROBE FULLY BUT DO NOT PROMPT and CODE TO THE LIST PROVIDED** **Weighted base = 726**	
	Word of mouth	***35%***
	None/NA - we do not recruit staff	***27%***
	Recruitment websites (e.g. Monster, fish4jobs)	***18%***
	Private recruitment agency	***10%***
	Advertising on own website	***9%***
	Jobcentre Plus	***8%***
	Local newspapers	***5%***

	Direct applications/CVs	*5%*
	Shop window/store advertisement	*4%*
	Schools/colleges/universities	*3%*
	Family/relatives	*3%*
	Other (Type in)	*3%*
	Advertisement in trade magazine	*2%*
	Social Media	*2%*
	Broadsheet newspapers	*1%*
	Head Office	*1%*
	Networks/networking	*1%*
	Gumtree	*1%*
	In-house/internal	*1%*
	Job Brokerage Service	*<1%*
	Specialist journals/papers	*<1%*
	Trade websites	*<1%*
	Lambeth Working	*<1%*
D2.	**Would you say there are any challenges to recruitment at the present time? (PLEASE PROBE FULLY BUT DO NOT PROMPT and CODE TO THE LIST PROVIDED)** **Weighted base = 726 (all respondents)**	
	No - none at present	*74%*
	Lack of applicants with the required skills	*13%*
	Lack of applicants with the required attitude/motivation	*6%*
	Lack of qualifications the company demands	*3%*
	Other (PLEASE TYPE IN)	*3%*
	Lack of work experience the company demands	*3%*
	Low number of applicants	*2%*
	Costs	*1%*
	Too much competition from other employers	*1%*
	Poor career progression	*1%*
	Cost of living in London	*1%*
	Job entails shift work/unsociable hours	*1%*
	Lack of funding	*<1%*
	No response	*<1%*
	Unsuitable applicants	*<1%*
	Language barrier	*<1%*

D3. **Does your business already offer, or would you consider offering… Weighted base = 726 (all respondents)**

		a. Already	b. Consider	c. Aware but	d. Not

ECORYS

		offer	offering	not relevant to our business	aware
	Apprenticeships	*15%*	*22%*	*59%*	*4%*
	Work Experience placements (through schools/ colleges/ training/ work placement agencies	*25%*	*20%*	*52%*	*3%*

D3a. **Do these schemes lead to people being taken on permanently?** **Weighted base = 107 (those who already offer apprenticeships), Weighted base = 182 (those who already offer work experience placements)**

		Apprenticeships	Work experience
	Yes	*63%*	*46%*
	No	*30%*	*48%*
	Don't know	*7%*	*6%*

D3b. **Would you like more information about these schemes? (If YES, please confirm we will pass their contact details on to the relevant contact at Lambeth Council)**
Weighted base = 187 (those who considered offering or who are not aware of apprenticeships)
Weighted base = 169 (those who considered offering or who are not aware of work experience placements)

		Apprenticeships	Work experience
	Yes	51%	51%
	No	49%	49%

D4. **When you recruit staff, do you make any particular effort to recruit local people?**
Weighted base = 726 (all respondents)

	Yes	*42%*
	No	*26%*
	Don't know	*4%*
	NA – do not recruit	*28%*

D5A. **Why do you make particular effort to recruit local people?** **Weighted base = 304(those making a particular effort to recruit local people)**

	Transport/travel easier	*34%*
	Convenience	*25%*
	Local people/staff more reliable	*13%*
	Like to support the local area/local economy	*13%*
	Local knowledge/knowing the area and advantage	*13%*
	Helps time keeping	*9%*

	Shirt times/hours suit local people	*6%*
	Other	*5%*
	Skills more important	*4%*
	Don't discriminate against anyone	*3%*
	Qualifications more important	*2%*
	Require specialist skilled people	*2%*
	Prefer/try to recruit locally	*2%*
	Best candidate gets the job regardless of location	*1%*
	Don't know	*<1%*
D5B.	**Why do you not make particular effort to recruit local people?** **Weighted base = 186 (those not making a particular effort to recruit local people)**	
	Skills more important	*35%*
	Don't discriminate against anyone	*25%*
	Best candidate gets the job regardless of location	*20%*
	Require specialist skilled people	*13%*
	Experience more important	*10%*
	Qualifications more important	*6%*
	Other	*4%*
	Convenience	*3%*
	Transport/travel easier	*3%*
	Don't know	*3%*
	Family only	*1%*
	Local people/staff more reliable	*<1%*
	Local knowledge/knowing the area and advantage	*<1%*
	Like to support the local area/local economy	*<1%*
	Do not recruit	*<1%*
	Shift times/hours suit local people	*<1%*

Section E – Business Engagement

And the final set of questions focuses on engagement with Lambeth Council, business support, communication and further consultation. **Weighted base = 726 (all respondents)**

E1.	**To what extent would you say Lambeth Council is business friendly?**	
	A large extent	*10%*
	To some extent	*30%*
	Not very much	*15%*
	Not at all	*8%*
	Don't know/no opinion	*37%*
E2.	**Lambeth is keen to learn how it can best help local businesses to grow and thrive and to help local people to secure viable employment opportunities in the area. What**	

	could the council do or do differently to help your business? (PROBE FULLY) Weighted base = 726 (all respondents)	
	Don't know/no comments	*18%*
	Parking/address parking issues	*14%*
	Improve communication/keep up to date	*12%*
	Other	*12%*
	Lower business rates/rents	*11%*
	Nothing	*9%*
	Help for small businesses	*8%*
	Advice for businesses/networking/creative hub	*6%*
	Funding for businesses/grants	*4%*
	Improve the image of the area	*2%*
	Reduce rates (commercial)	*2%*
	Improve rubbish collection	*2%*
	Limit number of particular type of businesses in areas	*2%*
	Improve security/more policing	*2%*
	Address anti-social behaviour	*2%*
	Street cleaning	*2%*
	Improve recycling	*2%*
	Make more premises available	*1%*
	Improve planning department/enforcement	*1%*
	Not allow commercial space to become residential	*1%*
	Deal with traffic/congestion issues	*1%*
	More contracts for local businesses	*1%*
	Improve infrastructure	*1%*
	Improve street lighting	*1%*
	Offer/facilitate training	*1%*
	More assistance with staff recruitment	*1%*
	More affordable housing	*1%*
	Improve transport	*1%*
	Quicker decisions/cut bureaucracy	*1%*
	Improve BIDs/consider improvement to how BIDs work	*1%*
	Help with finding premises	*<1%*
	Improve broadband/internet	*<1%*
	Improve licensing	*<1%*
E3.	**If you were to need help and advice for your business, where would you go/who would you contact for this support? INTERVIEWER – PLEASE PROBE FULLY BUT DO NOT PROMPT and CODE TO THE LIST PROVIDED** Weighted base = 726 (all respondents)	

	Accountant	*22%*
	Depends on support/advice required	*18%*
	Family member/friends	*14%*
	Internal/Head Office/Within organisation	*11%*
	Bank	*10%*
	Trade organisation	*9%*
	Government website / Gov.uk (formally business link)	*9%*
	Another business	*9%*
	Solicitor	*8%*
	Don't need/don't seek advice	*6%*
	No-one - have no-one to go to	*6%*
	Other	*6%*
	Business mentor	*5%*
	Financial advisor	*5%*
	Lambeth Council (person or Councillor)	*4%*
	Business networks/BIDs	*4%*
	HMRC	*3%*
	Lambeth Council website	*3%*
	Internet	*2%*
	Professional body	*2%*
	Consultants - internal & external	*1%*
	Chamber of Commerce	*1%*
	Google	*1%*
	Trustees	*<1%*
	Head Office	*<1%*
E3b.	**At the current time, which methods of communication do you find most effective in engaging with your customers, suppliers and partners? INTERVIEWER PLEASE PROBE FULLY BUT DO NOT PROMPT and CODE TO THE LIST PROVIDED** **Weighted base = 726 (all respondents)**	
	E-mail	*69%*
	Telephone	*60%*
	Face-to-face	*27%*
	Website	*16%*
	Social media (facebook/twitter/blogs etc)	*11%*
	Letters/post	*10%*
	Newsletters - paper based	*2%*
	Other	*1%*
	E-newsletters	*1%*
	Skype	*<1%*

	Text	*<1%*
E4a.	**Lambeth Council is keen to engage with you and the local business community. How can the council best work with you and the local business community to involve them in decisions about the local area? PLEASE READ OUT AND CODE ALL THAT APPLY** **Weighted base = 726 (all respondents)**	
	Online information and consultation	*49%*
	Face-to-face meetings (with Council Officers; Councillor etc)	*36%*
	Local meetings	*32%*
	Surveys (like this one)	*27%*
	Through BIDs, business networks and forums	*21%*
	Other (Please type in)	*2%*
	None	*2%*
	Emails	*1%*
	All of the above/combination of the above	*1%*
	Newsletters	*1%*
	No answer	*1%*
	N/a - doesn't want to be involved	*1%*
	Telephone	*1%*
	Don't know	*<1%*
	Local events	*<1%*
	Letter(s)	*<1%*
E4b.	**There may be further research including in-depth interviews, focus groups and workshops, following on from this survey. Would you be happy to be contacted/ invited to these sessions or to be kept informed about future opportunities to engage with the council and other local partners?** **Weighted base = 726 (all respondents)**	
	Yes	*58%*
	No – route to end	*42%*
E4c.	**Would you be happy for us to pass your responses back to the Council linked to your name in order for them to follow up relevant issues?** **Weighted base = 421 (those who agreed to further contact)**	
	Yes	*78%*
	No – I prefer my responses to remain anonymous	*22%*

Appendix 4 – Summary of main changes from 2011 to 2015

The summary tables below highlight key comparisons in findings from the 2015 Lambeth Business Survey with those from the 2011 Lambeth Business Survey.

Ratings of Lambeth as a business location			
	2015	**2011**	**% change**
Good (very good and good)	61%	38%	+23%
Poor (very poor and poor)	6%	22%	-16%

Growth expectations over the next 3 years			
	2015	**2011**	**% change**
Grow	61%	60%	+1%
Reduce scale of operations	3%	5%	-2%

Change in employee numbers over the last 12 months			
	2015	**2011**	**% change**
Increased	20%	14%	+6%
Decreased	7%	19%	-12%

Expected change in employee numbers over the next 12 months			
	2015	**2011**	**% change**
Increase	30%	23%	+7%
Decrease	2%	19%	-17%