

South Wimbledon Business Area

Freight Movement Research



Final Report

Prepared for

Merton Council

by



On behalf of the South London
Freight Quality Partnership

Version 01

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EXECUTIVE SUMMARY

The business consultation exercise consisting of face to face interviews with 40 businesses was conducted to ascertain and analyse freight movements in South Wimbledon Business Area, to determine businesses' views and perception of freight movements and to establish a set of recommendations to improve efficiency, economy, safety and sustainability of local freight movement. In developing the recommendations we also referred to the observational study of the business area, which we conducted in July 2008.

The analysis of quantitative and qualitative sets of data findings shows that the potential exists for improving freight transport movements in the business area. Recommendations, which are explained in detail in the report, include general co-ordination and rationalisation of freight movements, 'out of hours' deliveries, improvements to off-road loading and unloading facilities, improving signage and an introduction of the business area map.

1 INTRODUCTION

Transport & Travel Research Ltd (TTR) have been commissioned by Merton Council to carry out research to help better understand and manage freight movements in South Wimbledon Business Area (SWBA). This work has been commissioned through the South London Freight Quality Partnership which is coordinated by TTR.

SWBA (formerly the Morden Industrial Area) was set up as a shadow Business Improvement District (BID) in February 2003, backed by £324k of London Development Agency funding. The initial shadow BID ended in 2006, but to capture the benefits of co-operation, SWBA Ltd was set up. It is located in the South Wimbledon area of Merton Council, south of Merantun Way, east of Morden Road, North of Morden Hall Park and west of the River Wandle.

SWBA contains approximately 250 businesses of varying industrial types, employing 2-3,000 people in a wide variety of occupations. There are three entrances to the estate; via Jubilee Way, Lombard Road and Windsor Avenue.

A map of SWBA is set out below:

Figure 1: Plan of South Wimbledon Business Area



In 2006 a report was produced for Merton Council on parking issues in the SWBA. In 2008, Merton Council identified a need for further work in the area and commissioned TTR to conduct an initial observational study of freight movements. As this was purely a first stage observational study, consultation with businesses was not carried out at that stage. Two site visits were carried out; on 1st and 3rd July 2008 to observe the current nature of delivery and servicing activity within the study area and to identify visible existing problems impacting and resulting from delivery and servicing activity.

The main issues arising in the business area were observed as car parking, ease of vehicle movements within the area and accessibility. This project was commissioned by Merton Council as part of a wider initiative to make improvements to the business area and involved an extensive consultation exercise with the businesses.

This report has been prepared following the approval of the survey approach detailed in TTR's methodology statement submitted in August 2008 and subsequent survey work of selected businesses in SWBA.

It consists of the description of the methodology statement and survey approach in Chapter 2, survey findings and analysis in Chapter 3, recommendations in Chapter 4. The questionnaire used in the business consultation is attached in Annex A.

2 SURVEY METHODOLOGY

The project methodology was devised to provide the best possible research approach to help improve understanding of freight movements within the area and to indicate potential improvements which could be made to assist with local freight management.

The complete methodology consisted of initial freight observation surveys, face-to-face interviews with selected businesses in SWBA using a questionnaire to determine their views and perception of freight movements, interpretation of responses and development of a set of recommendations to improve efficiency, economy, safety and sustainability of local freight movement.

2.1 AIM

- To apply the most suitable research approach to identify and analyse freight movements in SWBA

2.2 OBJECTIVES

- To identify business perceptions and experiences of freight movements in SWBA
- To establish an understanding of delivery, collection and servicing patterns specific to SWBA
- To use the results of the research approach to form an understanding of freight movements in SWBA
- To offer recommendations on effective management and rationalisation of freight movements in SWBA

2.3 RESEARCH APPROACH

In developing the research methodology, the project team built on its knowledge and experience of managing the South London Freight Quality Partnership and in previously undertaking similar studies.

The survey methodology for this study consisted of both quantitative and qualitative approaches, involving collating data using a face-to-face questionnaire with businesses in SWBA. The questionnaire was designed to provide information to meet all objectives specified in the original methodology statement.

Before beginning interviews, we undertook to inform all businesses of the survey work by sending out a letter on Merton Council letter headed paper, which TTR drafted, explaining the purpose of the survey. Merton Council assisted by sending out the letters to all businesses.

As there are more than 250 businesses in SWBA and due to time and budget constraints, it was decided that only a sample of these would be interviewed. The introductory letter stated that ‘the consultants may follow this letter with a telephone call to ask for your participation in this survey’.

After the notification letters were sent, TTR gave a courtesy call to selected businesses reminding them of the forthcoming survey and trying to arrange a suitable time for conducting interviews.

2.3.1 Participant Profile

SWBA contains approximately 250 businesses of varying industrial types. To survey a variety of business TTR obtained contact details and more information of the nature of the businesses from Soloman, Association of South London Manufacturers.

We interviewed businesses comprising of 13 industrial types, mainly of retail, manufacturer, entertainment, services, wholesale, auto and bike repairs, import and export, maintenance publishing and printing. For the full profile of all participating businesses please see 3.1.2.

2.3.2 Sample Size

To get a representative sample of the entire SWBA business population, we intended to interview businesses on five main roads: Jubilee Way, Lee Road, Windsor Avenue, Deer Park Road and Lombard Road.

We aimed to set up interviews with five businesses on Jubilee Way, Lee Road, Windsor Avenue, Deer Park Road. Following a request from Merton Council to focus specifically on Lombard Road, we proposed to interview 20 businesses based there.

We intended, therefore, to attempt to complete approximately 40 business surveys. The exact analysis of the location of businesses surveyed and their profile is featured in Chapter 3.

2.3.3 Dates of Surveys

The interviews were conducted on the following dates:

Wednesday 27th August
Monday 1st September
Thursday 4th September
Wednesday 10th September
Thursday 11th September
Thursday 18th September
Friday 19th September

2.3.4 Questionnaire

Prior to conducting the interviews, TTR drafted a questionnaire (included in Annex A) and submitted it to Merton Council for review and approval. The questionnaire included questions covering:

- type of goods delivered/collected,

- frequency of delivery and collection activity,
- time of day of delivery and collection activity,
- number of delivery and collection activities per day,
- types of vehicles used,
- does the receiver organise transport,
- does the vehicle carry goods for other destinations in SWBA,
- do businesses have their own vehicle fleet, if so, what vehicles,
- what goods are being moved and how often,
- what are their views about problems facing freight movement on SWBA,
- how could movements be improved to be more efficient, safer, more sustainable,
- views on site map, signage, parking and accessibility.

2.3.5 Analysis

Quantitative and qualitative data analysis was performed following the interview process.

Quantitative data analysis involved data coding using SPSS for cross-referencing where necessary, to meet the objectives of the study.

Qualitative data analysis involved collating all open-ended responses and grouping them into categories of different question ratings to establish a first hand business perception of efficiency, safety and sustainability of freight movements, accessibility to and within the business area and views on servicing facilities and signage.

2.3.6 Risk Assessment

As part of our company's Risk Assessment policy we carried out site specific assessment to identify any potential risks to our interviewers and specify mitigation measures, where necessary.

2.3.7 Health & Safety

We place the utmost importance on health and safety for all our staff and clients and we produced a Health & Safety statement in accordance with our Health & Safety policy.

2.3.8 Our Interviewers

All our interviewers are skilled in a variety of market research techniques. For this particular exercise we used staff with specialist knowledge of freight transport and operational freight issues.

All our staff carried an identification card and a letter of authorisation to ensure only authorised personnel were allowed to conduct the interviews. Before going on site, all staff were briefed on the survey requirements, including risk assessment and health & safety.

All staff conducting the interviews also received copies of the risk assessment and health & safety policy and were asked to sign a letter showing that they had received

the appropriate training and fully understood the risk assessment and health & safety policy.

2.3.9 Market Research Society

Transport & Travel Research is an accredited member of the Market Research Society (MRS). We approach and conduct all our market research work in accordance with the MRS code of practice.

3 SURVEY FINDINGS AND ANALYSIS

3.1 Introduction

TTR contacted all businesses on the project contact list by telephone and arranged 40 face-to-face interviews. 5 businesses cancelled the interviews on the day without prior warning which meant having to rearrange the interviews with different businesses. 1 interviewee terminated the interview after 8 questions. This affected the number of businesses meant to be interviewed at each location, as specified in the original methodology (please see 2.3.2 Sample Size). Nevertheless, TTR managed to conduct its target of 40 interviews in total. The interview process benefited from letters being sent to businesses notifying them of the surveys as the interviewees who agreed to participate appeared helpful to the process and had the opportunity to familiarise themselves with the survey subject in advance. This ensured that TTR managed to gather all necessary, relevant and good quality data.

3.1.1 Interviews by location

Every effort was put in to arranging the exact number of interviews per location as specified in the original methodology statement: proposed 5 interviews on Jubilee Way, Lee Road, Windsor Avenue and Deer Park Road and 20 interviews on Lombard Road. Cancellations and willingness to participate or not to participate resulted in interviews actually being conducted in the following locations:

Table 1: Businesses by location

Location	Number of participating businesses
Lombard Road	13
Lee Road	2
Jubilee way	2
Deer Park Road	4
Windsor Avenue	15
Lyon Road	3
Morden Road	1
Total	40

This deviation from the original specification in our opinion did not in any way compromise the quality of data collected. The number of interviews undertaken on Lombard Road can be deemed to be representative and sufficient for providing its own specific analysis. Also, by conducting interviews on 2 additional roads within the area, TTR achieved wider coverage throughout SWBA, which contributed to a more representative sample and greater robustness of data collected. This change in the proportion of interviews per location was agreed with the project officer at Merton Council.

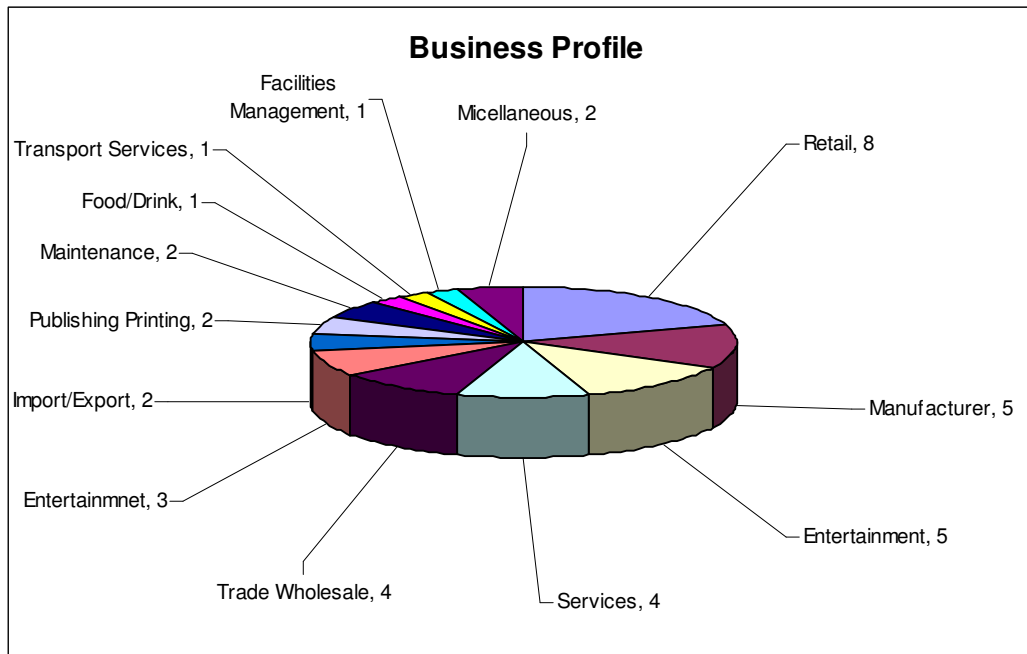
3.1.2 Business profile

Table 2 shows the profile of all businesses which participated in the surveys. They are grouped into 14 categories according to the nature of their trade.

Table 2: Business profile

Business sector	Number of participating businesses
Retail	8
Manufacturer	5
Entertainment	5
Services	4
Trade Wholesale	4
Auto/Bike Repairs	3
Import/Export	2
Publishing Printing	2
Maintenance	2
Food/Drink	1
Transport Services	1
Facilities Management	1
Miscellaneous	2

Figure 2: Business profile



It is not possible to compare the business profile of participating businesses to the business profile of all businesses in SWBA because this information was not available for comparison.

35 businesses (87.5%) have been trading for four or more years.

3.1.3 Business hours

All 40 business operate Monday to Friday, with 12 businesses (30%) also working on Saturday and 7 (17.5%) working on Sunday.

3.1.4 Delivery and collection patterns

Organising delivery and collection

25 businesses (62.5%) organise their own transport for delivery of goods and 27 (67.5%) organise their own transport for collection of goods. The remainder, with the exception of 3 respondents who did not know the answer, do not organise their own transport for delivery and collection of goods.

Delivery frequency

4 businesses (10%) have no daily delivery activities but 3 of these receive weekly deliveries. The same four businesses also have no daily collection activities at their premises.

29 businesses (72.50%) receive between 1 and 10 daily deliveries; 3 businesses (7.5%) receive between 11 and 20 daily deliveries; 3 businesses (7.50%) receive between 21 and 30 daily deliveries; 1 business (2.50%) receives 120 daily deliveries. 90% of businesses have between 1 and 120 daily deliveries which leads to a significant amount of commercial vehicle delivery/servicing movements, potentially affecting traffic flows and access to and within the business area.

Collection frequency

10 businesses (25%) have no daily collections but 7 of these have at least weekly collections.

24 businesses (60%) have between 1 and 10 daily collections; 3 businesses (7.5%) have between 11 and 20 daily collections; 2 businesses (5%) have between 21 and 30 daily collections; 1 business (2.5%) has 120 daily collections.

1 business (2.5%) has no delivery and collection activities.

3.1.5 Own vehicle fleet

14 businesses (35%) do not have their own vehicle fleets for delivery and collection of goods. Of the 26 businesses which have their own vehicle fleets, 24 (92.31%) have vans, 5 (19.23%) have rigid goods vehicles, 2 (7.69%) have articulated goods vehicles and 3 (15.38%) have other types of vehicles used for delivery and collection activities.

Table 3: Vehicle fleet

Number of businesses	Number and type of vehicle			
	Van	Rigid Goods Vehicle	Articulated Goods Vehicles	Other
1	1			2 cars
1	1	2		
1	1			8 courtesy cars
1	2	55		
1	3			
1	4	3		
1	6	3	2	
1	13			
1	50	14	2	
1				6 special equipment lorries
1				18 taxis
2	5			
3	2			
10	1			

3.1.6 Vehicle types which service the business area

Question 4 'What type of vehicles deliver to and collect from your business?' was answered by 20 businesses. (it was optional for businesses which have their own vehicle fleet, as per Question 3, to answer Question 4).

Delivery

15 of those businesses which answered Question 4 are serviced by vans, 7 by rigid goods vehicles, 12 by articulated goods vehicles and 3 by other types of vehicles (bikes and cars).

Collection

16 of those businesses which answered Question 4 are serviced by vans, 5 by rigid goods vehicles, 6 by articulated goods vehicles and 2 by other types of vehicles (cars).

3.1.7 Vehicle sharing

Question 5 aimed to determine if businesses share vehicles for delivery and collection activities.

Delivery

24 businesses (60%) are serviced by the same vehicles for delivery of goods which also deliver to other businesses. 20 of those businesses (83.33%) don't know how many businesses are serviced by the same vehicles for delivery. 3 businesses (12.5%) are serviced by the same vehicles with 1 other business and 1 business

(4.17%) is serviced by the same vehicle with 3 other businesses. 12 businesses (30%) are not serviced by the same vehicles for delivery with any other business and 4 businesses (10%) don't know if the vehicle they use for delivery is also used by any other business. To optimise the number of delivery vehicles required to serve the business area and taking into account average servicing time in Table 6 which shows the majority of premises receive small consignments frequently and which are off loaded quickly, there could be a potential to expand the idea of a local consolidation centre..

Collection

25 businesses (62.50%) are serviced by vehicles for collection of goods which also collect from other businesses. 22 of those businesses (88.00%) don't know how many businesses are serviced by the same vehicles for collection, 2 businesses (8.00%) are serviced by the same vehicles with 1 other business and 1 business (4.00%) is serviced by the same vehicle as 3 other businesses. 11 businesses (27.5%) are not serviced by the same vehicles for collection with any other business and 4 businesses (10%) don't know if the vehicle they use for delivery is also used by any other business.

3.1.8 Frequency of servicing

The busiest day for delivery and collection:

Table 4: Busiest days for servicing

Delivery			Collection		
Day	Number of businesses	Ratio	Day	Number of businesses	Ratio
Monday	8	20.00%	Monday	5	12.50%
Tuesday	10	25.00%	Tuesday	3	7.50%
Wednesday	6	15.00%	Wednesday	3	7.50%
Thursday	5	12.50%	Thursday	3	7.50%
Friday	7	17.50%	Friday	9	22.50%
Saturday			Saturday	1	2.50%
Sunday			Sunday		
no busy day	20	50.00%	no busy day	25	62.50%

Delivery

Monday is the busiest day for delivery for 8 businesses (20%). 10 businesses (25%) have the most deliveries on Tuesday, 6 businesses (15%) on Wednesday, 5 businesses (12.5%) on Thursday and 7 businesses (17.5%) on Friday. Saturday and Sunday were not the busiest days for delivery for any businesses. 20 businesses (50%) said that there was no busiest day for delivery, which means that their delivery activity is relatively equally proportioned during the week.

Collection

Monday is the busiest day for collection for 5 businesses (12.5%). 3 businesses (7.5%) have the most collections on Tuesday, 3 businesses (7.5%) on Wednesday, 3 businesses (7.5%) on Thursday, 9 businesses (22.5%) on Friday and 1 business (2.5%) on Saturday. Sunday was not the busiest day for collection for any

businesses. 25 businesses (62.5%) said that there was no busiest day for collection, which means that their collection activity is relatively equally proportioned during the week.

Busiest servicing periods:

Table 5: Busiest day periods for servicing

Delivery			Collection		
Period	Number of businesses	Ratio	Period	Number of businesses	Ratio
before 7am	3	7.50%	before 7am		
7am-10am	8	20.00%	7am-10am	3	7.50%
10am-4pm	17	42.50%	10am-4pm	19	47.50%
4pm-7pm			4pm-7pm	3	7.50%
after 7pm			after 7pm		
Before 7am-after 7pm	2	5.00%	before 7am-after 7pm	2	5.00%
7am-4pm	3	7.50%	7am-4pm	2	5.00%
7am-7pm	1	2.50%	7am-7pm	1	2.50%
7am-after 7pm	1	2.50%	7am-after 7pm	1	2.50%
10am-7pm	1	2.50%	7am-10am&after 7pm	1	2.50%
			10am-7pm	1	2.50%
n/a	4	10.00%	n/a	7	17.50%

The majority of businesses (17 (42.5%)) have deliveries between 10am and 4pm as well as collection (19 (47.5%)). As the majority of delivery and collection activities take place during the day it may be worth exploring the potential for out of hours deliveries and collections. The opportunity is to remove delivery vehicles from daytime to out of hours, reduce impact on traffic movements, improve access and ease conflict with private cars. This could help to address some of the accessibility issues also noted in 3.1.10 Servicing facilities and 3.1.11 Business perception.

Average servicing time:

Table 6: Average servicing time

Delivery			Collection		
Time in minutes	Number of businesses	Ratio	Time in minutes	Number of businesses	Ratio
less than 10	15	37.50%	less than 10	21	52.50%
10-20	11	27.50%	10-20	7	17.50%
20-30	7	17.50%	20-30	5	12.50%
30-40	1	2.50%	30-40		
40-50			40-50	1	2.50%
50-60			50-60		
more than 60	1	2.50%	more than 60	1	2.50%
less than 10&more than 60	1	2.50%	less than 10&more than 60	1	2.50%
10-20&more than 60	1	2.50%			
30-40&more than 60	1	2.50%			
n/a	2	5.00%	n/a	4	10.00%

The majority of businesses (15 (37.5%)) have deliveries which take less than 10 minutes and similarly for collections (21 (52.5%)). As delivery and collection activities are quick and involve relatively small consignment sizes, it may be worth exploring potential for a consolidation centre to reduce the level of traffic movements, improve accessibility and reduce conflict with private cars. This would also help to address accessibility issues which are highlighted in 3.1.10 Servicing facilities and 3.1.11 Business perception.

3.1.9 Methods of handling goods

Table 7: Methods of handling goods

Delivery			Collection		
Method	Number of businesses	Ratio	Method	Number of businesses	Ratio
on pallets	24	60.00%	on pallets	16	40.00%
in roll cages	8	20.00%	in roll cages	4	10.00%
in tote boxes	17	42.50%	in tote boxes	14	35.00%
in loose cartons	17	42.50%	in loose cartons	19	47.50%
other	10	25.00%	other	8	20.00%

The majority of businesses have goods delivered and collected on pallets, in tote boxes and loose cartons. A minority of businesses use roll cages for delivery and collection of goods. As the delivery and collection methods for servicing goods are similar between businesses there might be a possibility of using the same vehicle for multiple businesses which could run and serve from a consolidation centre. This could optimise the number of vehicles required to service the business area, as also noted in 3.1.5 Vehicle fleet.

3.1.10 Servicing facilities

34 businesses (85%) have off street loading and unloading facilities for delivery and collection of goods. 18 businesses (52.94%) said the facilities were good and 10 (29.41%) said very good. Only 1 business said the facilities were poor and 1 said they were very poor. It is noted, though, that indiscriminate parking is the problem and servicing facilities can often be blocked. To address this issue, a detailed parking review and analysis of parking activity is recommended as well as the development of a business area travel plan.

Table 8: Maximum vehicle size servicing businesses

Maximum size of vehicle that can access a business site?	Number of businesses
Cars	
Small Vans	
Single Rear Transit Type Vehicle	1
2 axles <7.5 tonnes twin rear wheel transit van	1
2 axles 7.5 to 17 tonnes (with reflective plates)	4
3 axles (rigid) 17 to 25 tonnes	5
4 axles (rigid) 25 to 33 tonnes	1
3 or 4 axles (articulated) up to 33 tonnes	7
5 or more axles (articulated) over 33 tonne	16

The majority of businesses are able to accept the largest of delivery vehicles confirming that off street loading and unloading facilities are adequate and 36 businesses (90%) think that there is sufficient space for delivery, collection and servicing at their sites.

Businesses which do not have off street loading and unloading facilities for delivery and collection of goods receive and collect their goods on the forecourt and via reception.

3.1.11 Business perception

Signage:

Table 9: Signage rating

How would you describe the signage to the business estate within the surrounding road network?	Number of businesses
Very poor	3
Poor	23
Fair	5
Good	4
Very good	3
Not applicable	2

3 businesses (7.5%) think that signage to the business estate within the surrounding road network is very poor, 23 (57.5%) think it's poor, 5 (12.5%) think it's fair, 4 (10%) think it's good and 3 (7.5%) think it's very good. The main explanations given for poor signage were lack of and poor visibility of signage. This can be greatly improved by a signage review of the road network in close proximity to the business area and within the business area.

Accessibility:

Table 10: Site accessibility

How would you describe the accessibility within the business estate?	Number of businesses
Very poor	3
Poor	5
Fair	14
Good	13
Very good	4
Not applicable	1

14 businesses (35%) think the accessibility within the business estate is fair, 13 (32.5%) think it's good, 5 (12.5%) think it's poor, 4 (10%) think it's very good and 3 (7.5%) think it's very poor. Main reasons for poor accessibility were size of freight vehicles, narrow roads and car parking, causing obstruction to freight vehicles.

15 businesses (37.5%) advise those making deliveries, collections or servicing about the maximum size of vehicle that can access their site.

Site map:

Only 10 businesses (25%) provide their suppliers and operators with a map of the estate indicating the location of their premises. It is our opinion that a map of the estate with businesses' locations would help support the signage improvements mentioned above.

Delivery and servicing plan:

Only 8 businesses (20%) have delivery and servicing plan. It tends to be that large businesses, as per the number of employees, have delivery and servicing plans. In fact, the three largest businesses in this respect, employing 600, 123 and 45 full time staff have delivery and servicing plans.

3.2 Lombard Road

In line with Merton Council’s request to specifically focus on Lombard Road, we interviewed 13 businesses located there. For these interviews we present a set of findings in the same context as for the wider business area.

As will be seen, survey findings for Lombard Road are not dissimilar to the findings for the wider business area. Because of these similar patterns the recommendations presented in Chapter 4 will be applicable to Lombard Road as well as to the wider business area. In this section of the report, however, we offer recommendations which are specific to Lombard Road only.

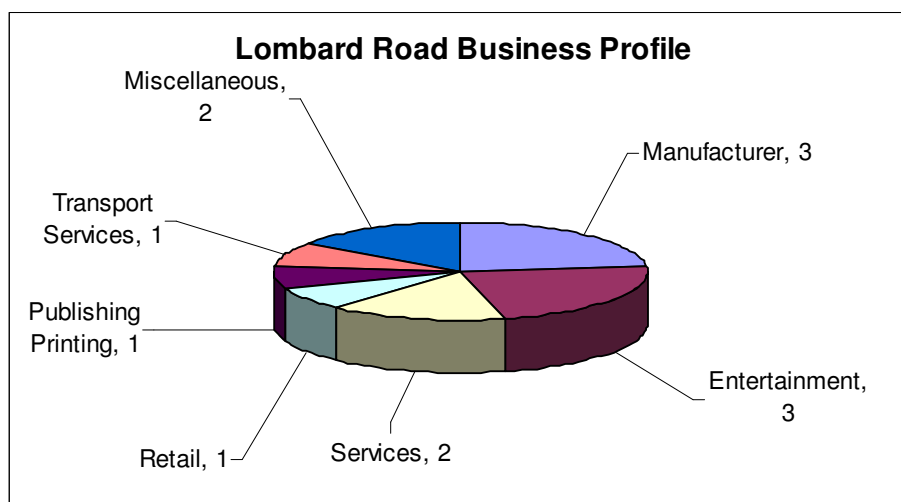
3.2.1 Business profile

Table 11 shows the business profile of all businesses in Lombard Road which participated in the surveys. They are grouped into 7 categories according to the nature of their trade.

Table 11: Lombard Road business profile

Business sector	Number of participating businesses
Manufacturer	3
Entertainment	3
Services	2
Retail	1
Publishing Printing	1
Transport Services	1
Miscellaneous	2

Figure 3: Lombard Road business profile



In comparison to the business profile for the wider SWBA, Lombard Road shows a similarly high number of manufacturing and entertainment businesses but less retail.

3.2.2 Business hours

All 13 businesses operate Monday to Friday, with 1 business also working on Saturday and 2 on Sunday.

3.2.3 Delivery and collection patterns

Organising delivery and collection

9 businesses organise their own transport for delivery and collection of goods. 4 businesses do not organise their own transport for delivery of goods and do not organise their own transport for collection of goods.

Delivery frequency

3 businesses have no daily delivery activities but they receive weekly deliveries. The same 3 businesses also have no daily collection activities at their premises. 7 businesses receive between 1 and 10 daily deliveries; 2 businesses receive between 11 and 20 daily deliveries and 1 business receives between 21 and 30 daily deliveries.

The majority of businesses have between 1 and 10 daily deliveries which corresponds with the findings for the wider business area. This delivery pattern can lead to a significant amount of commercial vehicle delivery/servicing movements, potentially affecting traffic flows and access to and within the business area.

Collection frequency

4 businesses have no daily collections but 3 of these have at least weekly collections. 6 businesses have between 1 and 10 daily collections; 2 businesses have between 11 and 20 daily collections and 1 business has between 21 and 30 daily collections.

The majority of businesses have between 1 and 10 daily collections which corresponds with the findings for the business area.

3.2.4 Own vehicle fleet

4 businesses do not have their own vehicle fleets for delivery and collection of goods. Of the 9 businesses which have their own vehicle fleets, 4 have 1 van, 1 has 1 van and 2 cars, 1 has 3 vans, 2 have 5 vans and 1 has 50 vans, 14 rigid goods vehicles and 2 articulated goods vehicles.

Table 12: Lombard Road vehicle fleet

Number of businesses	Number and type of vehicle			
	Van	Rigid Goods Vehicle	Articulated Goods Vehicles	Other
4	1			
1	1			2 cars
1	3			
2	5			
1	50	14	2	

3.2.5 Vehicle types which service Lombard Road

Question 4 'What type of vehicles deliver to and collect from your business?' was answered by 8 businesses. (it was optional for businesses which have their own vehicle fleet, as per Question 3, to answer Question 4).

Delivery

6 of those businesses which answered Question 4 are serviced by vans, 3 by rigid goods vehicles, 3 by articulated goods vehicles and 1 by other types of vehicles (cars).

Collection

7 of those businesses which answered Question 4 are serviced by vans, 2 by rigid goods vehicles and 2 by articulated goods vehicles.

Similar to findings for the wider business area, the majority of businesses in Lombard Road are serviced by vans for delivery and collection of goods.

3.2.6 Vehicle sharing

Question 5 aimed to determine if businesses share vehicles for delivery and collection activities.

Delivery

6 businesses use vehicles for delivery of goods which also deliver to other businesses. 5 of those businesses don't know how many businesses use the same vehicles for delivery and 1 business uses the same vehicle with 1 other business. 5 businesses don't use vehicles for delivery with any other business and 2 businesses don't know if the vehicle they use for delivery is also used by any other business.

To optimise the number of delivery vehicles required to serve Lombard Road and taking into account average servicing time in Table 15 which shows the majority of premises receive small consignments frequently, which are off-loaded quickly, there could be the potential to explore the idea of a local consolidation centre. This corresponds with the findings for the business area.

Collection

6 businesses use vehicles for collection of goods which also collect from other businesses. 5 of those businesses don't know how many businesses use the same vehicles for collection and 1 business uses the same vehicle with 1 other business. 5 businesses don't use vehicles for collection with any other business and 2 businesses don't know if the vehicle they use for collection is also used by any other business.

3.2.7 Frequency of servicing

The busiest day for delivery and collection:

Table 13: Busiest days for servicing in Lombard Road

Delivery		Collection	
Day	Number of businesses	Day	Number of businesses
Monday	2	Monday	
Tuesday	2	Tuesday	1
Wednesday	2	Wednesday	1
Thursday	2	Thursday	
Friday	3	Friday	3
Saturday		Saturday	1
Sunday		Sunday	
no busy day	7	no busy day	8

Delivery

Monday is the busiest day for delivery for 2 businesses. 2 businesses have the most deliveries on Tuesday, 2 on Wednesday, 2 on Thursday and 3 on Friday. Saturday and Sunday were not the busiest day for delivery for any businesses. 7 businesses said that there was no busiest day for delivery, which means that their delivery activity is fairly equally proportioned during the week.

Collection

Monday is not the busiest day for collection for any business. 1 business has the most collections on Tuesday, 1 on Wednesday, 3 businesses on Friday and 1 on Saturday. Sunday was not the busiest day for collection for any businesses. 8

businesses said that there was no busiest day for collection, which means that their collection activity is fairly equally proportioned during the week.

Busiest servicing periods:

Table 14: Busiest day periods for servicing in Lombard Road

Delivery		Collection	
Period	Number of businesses	Period	Number of businesses
<7am		<7am	
7am-10am	3	7am-10am	2
10am-4pm	6	10am-4pm	6
4pm-7pm		4pm-7pm	1
>7pm		>7pm	
n/a	2	n/a	2
7am-4pm	1	7am-4pm	1
10am-7pm	1	10am-7pm	1

The majority of businesses have deliveries between 10am and 4pm as well as collection which is very similar to the findings for the wider business area. As the majority of delivery and collection activities take place during the day it may be worth exploring the potential for out of hours deliveries and collections. The opportunity is to remove delivery vehicles from daytime to out of hours, reducing impact on traffic movements, improving access and easing conflict with private cars.

Average servicing time:

Table 15: Average servicing time on Lombard Road

Delivery		Collection	
Time in minutes	Number of businesses	Time in minutes	Number of businesses
<10	4	<10	5
10-20	5	10-20	4
20-30	2	20-30	2
30-40		30-40	
40-50		40-50	
50-60		50-60	
>60		>60	
n/a	1	n/a	2
10-20&>60	1	<10&>60	

The majority of businesses have deliveries and collections which take less than 10 minutes or between 10 and 20 minutes which is similar to the findings for the wider business area. Delivery and collection activities appear to be quick and involve relatively small consignment sizes.

3.2.8 Methods of handling goods

Table 16: Methods of handling goods in Lombard Road

Delivery		Collection	
Method	Number of businesses	Method	Number of businesses
on pallets	7	on pallets	5
in roll cages		in roll cages	
in tote boxes	5	in tote boxes	5
in loose cartons	3	in loose cartons	5
other	2	other	3

The majority of businesses have goods delivered and collected on pallets, in tote boxes and loose cartons which is very similar to findings for the wider business area. None of the businesses use roll cages for delivery and collection of goods.

Recommendation: As the delivery and collection methods for servicing goods are similar between businesses there might be a possibility of using the same vehicle for multiple businesses which could run and serve from a local consolidation centre. This could optimise the number of vehicles required to service the business area.

3.2.9 Servicing facilities

10 businesses have off street loading and unloading facilities for delivery and collection of goods. 6 businesses said the facilities were good, 3 said they were fair and 1 said they were very poor. Even though the majority of respondents felt that their off street servicing facilities were good, some of their responses suggest parking is an issue and can cause obstruction to vehicle access. Parking was also a major issue for the business which responded to say that its facilities were very poor..

Recommendation: to address this issue, a detailed parking review and analysis of parking activity for the business area is recommended as well as development of a business area travel plan. Also, taking into account the busiest day periods for servicing being between 10am and 4pm and the average servicing time of around 10 minutes, Lombard Road could benefit from a 30 minute dedicated loading bay.

Table 17: Maximum vehicle size servicing businesses in Lombard Road

Maximum size of vehicle that can access a business site?	Number of businesses
Cars	
Small Vans	
Single Rear Transit Type Vehicle	
2 axles <7.5 tonnes twin rear wheel transit van	
2 axles 7.5 to 17 tonnes (with reflective plates)	3
3 axles (rigid) 17 to 25 tonnes	1
4 axles (rigid) 25 to 33 tonnes	
3 or 4 axles (articulated) up to 33 tonnes	1
5 or more axles (articulated) over 33 tonne	5

The majority of businesses are able to accept the largest of delivery vehicles confirming that off-street loading and unloading facilities are adequate. The majority of businesses also think that there is sufficient space for deliveries, collections and servicing at their premises.

Businesses which do not have off street loading and unloading facilities for delivery and collection of goods receive and collect their goods on the forecourt and via reception. This means that the vehicles which service these businesses usually park on the road in front of or close by the business premises.

3.2.10 Business perception

Signage:

Table 18: Signage rating amongst businesses in Lombard Road

How would you describe the signage to the business estate within the surrounding road network?	Number of businesses
Very poor	1
Poor	5
Fair	4
Good	3
Very good	
Not applicable	

1 business thinks that signage to the business estate within the surrounding road network is very poor, 5 think it's poor, 4 think it's fair and 3 think it's good. None of the businesses thought the signage was very good. This corresponds with findings for the wider business area. The main explanations given for poor signage were lack of and poor visibility of signage. This can be greatly improved by a signage review of the road network in close proximity to the business area and within the business area which will also address the issues concerning Lombard Road.

Accessibility:

Table 19: Site accessibility for Lombard Road

How would you describe the accessibility within the business estate?	Number of businesses
Very poor	1
Poor	3
Fair	2
Good	7
Very good	
Not applicable	

1 business thinks the accessibility within the business estate is very poor, 3 think it's poor, 2 think it's fair and 7 think it's good. None of the businesses thought the accessibility was very good. This corresponds with the findings for the wider business area. Main reasons for poor accessibility were size of freight vehicles, narrow roads, car parking causing obstruction to freight vehicles and inadequate enforcement of yellow lines.

4 businesses in Lombard Road advise those making deliveries, collections or servicing about the maximum size of vehicle that can access their site.

Site map:

Only 3 businesses in Lombard Road provide their suppliers and operators with a map of the estate indicating the location of their premises. It is our opinion that a map of the estate with businesses' locations would help to support any signage improvements resulting from the signage review mentioned above.

Delivery and servicing plan:

Only 2 businesses on Lombard Road have delivery and servicing plans.

Recommendations: all recommendations for the wider business area offered in Chapter 4 of this report apply equally to Lombard Road.

A specific recommendation for Lombard Road is for a 30 minute dedicated loading bay to be introduced. This takes into account the busiest day periods for servicing being between 10am and 4pm and the average servicing time of around 10 minutes. Such a loading bay would also help to address the wider issues caused by indiscriminate car parking.

3.3 Observation study

In developing the recommendations for this report we also referred to the observation study which we carried out; on 1st and 3rd July 2008 to observe the current nature of delivery and servicing activity within the study area and to identify visible existing problems impacting and resulting from delivery and servicing activity.

Observational study findings concerned issues regarding:

- signage; road signage is not present throughout the estate and there is no sign board at the main entrance to show where the different organisations are located within the estate
- pedestrian access; the footways in the area are of poor quality and are often blocked by parked cars or overhanging greenery. In general the pedestrian and cycle environment is poor
- parking; cars parked on the kerbs across most of the estate roads cause obstructions to pedestrian movements and delivery vehicles and reduce visibility for delivery vehicles exiting the building access roads. In some areas, there are parking restrictions in place (with appropriate signage and double yellow lines) and at the time of the observations, these parking restrictions were generally not respected or enforced. A high level of uncontrolled parking was observed on Lombard Road in particular
- vehicle movements: the majority of delivery vehicle traffic observed consisted of light good vehicles.

Main recommendations of the initial observation study included investigation for an introduction of a consolidation centre; review and improvements to signage; development of local traffic management schemes; Smarter Choices Programme which could include an area-wide staff and customer travel plan, a Delivery and Servicing Plan and a plan for improved accessibility to the estate; parking review; establishing a freight quality partnership; consultation with businesses.

4 RECOMMENDATIONS

The analysis of findings shows that there is the potential for improving freight movements in SWBA. Recommendations provided are a result of detailed analysis of both quantitative and qualitative sets of data gathered during the interview process and also reflect the findings of the observation study, which was conducted in July 2008.

General Coordination – Freight Quality Partnership

Freight transport is a key issue and vital to the vitality of the SWBA. The fundamental aim should be to maximise the efficiency and safety of local freight transport, while minimising its environmental impacts.

Recommendation: A business forum group, consisting of interested local businesses, already exists and could form the core of a SWBA Freight Quality Partnership. As a group, the aim of the FQP would be to provide a platform for various parties with an interest in freight transport to come together (including local operators, consignors, consignees, trade associations and the local authority) to discuss issues and find local solutions to local problems. An annual FQP Action Plan could be devised to cover some of the key issues and further recommendations below.

Rationalisation of Vehicle Movements

The majority of businesses within SWBA are serviced with daily deliveries and collections. The majority of vehicles undertaking this very frequent daily activity are vans, carrying relatively small consignments, often for multiple delivery points within the Business Area. The consignments collected and delivered by these vehicles are loaded and unloaded within short time periods and the majority of goods are transported in standard handling units (pallets, roll-cages, tote boxes or as loose cartons), meaning grouped or mixed loads from various suppliers destined for numerous customers could potentially be compatible for carriage on the same vehicle.

Recommendation: Significant levels of van activity, with multiple vehicles carrying small consignments to individual business premises, contribute to traffic volumes within the Business Area. Consolidation of smaller consignments at a location on the periphery of the Business Area, to be loaded onto and delivered by a single, larger, more environmentally-friendly vehicle, would help to reduce the volume of commercial vehicle traffic within the area, helping to improve safety, reduce conflict with other road users and reduce vehicle emissions. It is recommended that work is undertaken to assess the feasibility of establishing a consolidation centre on the periphery of or at a distance away from the Business Area, where small consignments would be received and grouped for onward delivery on a larger, environmentally-friendly vehicle.

Recommendation: Large volumes of small delivery vehicles operating within the Business Area, particularly during peak periods between 10am and 4pm, mean that

on-street loading and unloading space is in high demand. Although most respondents confirmed that they had off-street loading and unloading facilities available, at times these were inaccessible due to parked cars blocking access. Some other premises do receive deliveries through reception or via their forecourts (calling on on-street loading/unloading activity). The creation of an on-street loading/unloading bay at a particular hotspot (to be determined), with space for multiple smaller delivery vehicles to carry out simultaneous deliveries would help to free-up traffic movement and help increase safe working practices, avoiding delivery drivers having to use available roadspace for parking/loading/unloading. The bay could have a maximum delivery 'dwell' time permissible (potentially 30 minutes) and would require good quality enforcement to ensure available space was not used by staff/visitors for car parking.

Recommendation: A Freight Quality Partnership established for the Area could also be responsible for a series of 'innovative' initiatives to help reduce volumes of commercial vehicle traffic on-site. These initiatives could involve creating an electronic 'shared load' board to allow businesses to share vehicle resources, to combine ordering activity or to form purchasing consortia, involving collective ordering from a single supplier and larger consolidated deliveries on the same vehicle. Formation of resource partnerships could also be encouraged, where separate businesses within the area pool or share vehicle resources, including the potential to establish a van-sharing partnership.

'Out of Hours' Deliveries

The majority of delivery and collection activity is undertaken between 10am and 4pm. Reducing goods vehicle movements during this peak period would help to reduce overall traffic volumes, improve local road safety, reduce instances of conflict with other road users and reduce vehicle emissions, as goods vehicles gain access and egress to and from their destinations more quickly, encountering less delays and using less fuel in the process, due to reduced time spent stationary, idling in traffic.

Recommendation: Increasing the use of 'out-of-hours' deliveries, i.e. those outside of the peak period identified, could potentially help to improve the efficiency of local freight movement, while helping to reduce its environmental impact. It is recommended that an assessment of the feasibility of undertaking increased 'out-of-hours' deliveries is carried out, under the guidance of the recommended Freight Quality Partnership.

Improving Access to Off-road Loading and Unloading Facilities

The majority of businesses have good quality, off-street loading and unloading facilities, able to accept the largest of delivery vehicles. However, it was found that indiscriminate parking of staff/visitor cars can affect accessibility to these loading/unloading facilities. This means that vehicles which would otherwise have been able to carry out loading and unloading activity off-street are forced to perform servicing activity on or adjacent to the public road, as available off-road space is occupied by staff/visitor vehicles.

Recommendation: It is recommended that a parking review, linked to an Area-wide Travel Plan (effectively developing a sustainable plan for staff and visitor travel to

and from the Business Area) is undertaken. The parking review would assess the total number of private staff and visitor vehicles parked within the Area and compare this to the number of official parking spaces – essentially a ‘capacity versus usage’ assessment. This would provide the basis for development of an Area-wide travel plan, to be produced with support from the Business Forum, to help encourage alternatives to single-occupancy private car use.

Recommendation: Few of the businesses surveyed had delivery and servicing plans (DSPs) in place to help manage and encourage sustainable inbound and outbound freight movements. The development of a DSP pilot for a small sample of businesses could help to encourage others to review their role in generating local freight traffic and in devising appropriate plans to help reduce their freight-related environmental impact, while improving efficiency.

Improving Signage – On Peripheral Local Road Network and within the Business Area

The majority of businesses felt that the quality, availability and visibility of signage to the Business Area on the local road network could be improved.

Recommendation: A review of current signage (particularly signage specific for HGVs) on the local road network would help to identify areas where signage gaps exist and where improvements could be made.

Recommendation: A review of information available for goods vehicle drivers within the Business Area should also be undertaken, including an assessment of information available on display boards within the Area, containing business names and locations, as well as clarity and visibility of individual road signs and the potential benefits of plans of the Business Area made available in advance of each entrance to help drivers plan their routes before arriving on site. This work could involve zoning or colour-coding of separate areas/roads within the Business Area, displaying the colour-coded zones on information boards at the three entrances and listing all businesses within the respective colour-coded areas. This colour-coding on boards could be supplemented by colour coding on road signs and on supporting maps (see below) to be provided to suppliers and carriers.

Driver Information – Maps

A relatively small number of businesses (25%) provide their suppliers and carriers with maps detailing the location of their premises. Maps, showing on one side wider South Wimbledon/Merton and on the other side the specific plan of the Business Area, would help to support the improvements to road signage and on-site information, mentioned above. These industrial estate maps are relatively inexpensive to produce and have been proven to be successful measures in helping to manage freight movements in many other locations.

Recommendation: It is recommended that an SWBA freight map is produced to illustrate key preferred access routes to and from the site and to indicate the location of zones/individual landmark businesses to help delivery drivers plan their routes in advance of arriving on site.

Annex A

Questionnaire

SWBA Interview Survey

Location	South Wimbledon Business Area		
Time		Date	
Name of Business		Business Telephone Number	
Type of Business		Business Email	
Address		Business Web Address	

Interviewee Name	
-------------------------	--

Good morning/afternoon. I am from TTR and we are conducting the interviews on behalf of Merton Council to find out what the business perception and experience are of freight movements in South Wimbledon Business Area. The survey will help us better understand the freight movements and enable us to offer recommendations on better and improved management and rationalisation of freight operations in the area. The questionnaire will take between 15 and 20 minutes.

Day of interview					
Mon	Tues	Wed	Thurs	Fri	Sat
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

Q1	Please can you tell me your business hours?		
		From	To
	Monday		
	Tuesday		
	Wednesday		
	Thursday		
	Friday		
	Saturday		
	Sunday		

Q2	Approximately, how many delivery and collection activities do you have on an average day/week?		
	Daily Delivery		Weekly Delivery
	Daily Collection		Weekly Collection

Q3	Do you have your own vehicle fleet?		
	Yes, please specify type and number of vehicles and go to Q5		
	Van	<input type="checkbox"/> 1	No.
	Rigid goods vehicle	<input type="checkbox"/> 2	No.
	Articulated goods vehicle	<input type="checkbox"/> 3	No.
	Other	<input type="checkbox"/> 4	No.
	No	<input type="checkbox"/> 5	Go to Q4

Q4	Can you tell me what type and number of vehicles deliver to and collect from your business?		
	Delivery		
	Van	<input type="checkbox"/> 1	No.
	Rigid goods vehicle	<input type="checkbox"/> 2	No.
	Articulated goods vehicle	<input type="checkbox"/> 3	No.
	Other	<input type="checkbox"/> 4	No.
	Collection		
	Van	<input type="checkbox"/> 1	No.
	Rigid goods vehicle	<input type="checkbox"/> 2	No.
	Articulated goods vehicle	<input type="checkbox"/> 3	No.
	Other	<input type="checkbox"/> 4	No.

Q5	Are goods delivered to and collected from your business on the same vehicles as goods for other businesses in the estate?						
	Delivery						
	Yes	<input type="checkbox"/> 1	No. of businesses	No	<input type="checkbox"/> 2	Don't know	<input type="checkbox"/> 3
	Collection						
	Yes	<input type="checkbox"/> 1	No. of businesses	No	<input type="checkbox"/> 2	Don't know	<input type="checkbox"/> 3

Q6	Please can you tell me which the busiest day for delivery and collection of goods for your business is?					
	Delivery					
	Monday	<input type="checkbox"/> 1	Thursday	<input type="checkbox"/> 4	Sunday	<input type="checkbox"/> 7
	Tuesday	<input type="checkbox"/> 2	Friday	<input type="checkbox"/> 5	There is no busiest day	<input type="checkbox"/> 8
	Wednesday	<input type="checkbox"/> 3	Saturday	<input type="checkbox"/> 6		
	Collection					
	Monday	<input type="checkbox"/> 1	Thursday	<input type="checkbox"/> 4	Sunday	<input type="checkbox"/> 7
	Tuesday	<input type="checkbox"/> 2	Friday	<input type="checkbox"/> 5	There is no busiest day	<input type="checkbox"/> 8
	Wednesday	<input type="checkbox"/> 3	Saturday	<input type="checkbox"/> 6		

Q7	During which period(s) do the majority of your deliveries and collections take place?			
	Delivery			
	Before 7am	<input type="checkbox"/> 1	4pm-7pm	<input type="checkbox"/> 4
	7am-10am	<input type="checkbox"/> 2	After 7pm	<input type="checkbox"/> 5
	10am-4pm	<input type="checkbox"/> 3	Not applicable	<input type="checkbox"/> 6
	Collection			
	Before 7am	<input type="checkbox"/> 1	4pm-7pm	<input type="checkbox"/> 4
	7am-10am	<input type="checkbox"/> 2	After 7pm	<input type="checkbox"/> 5
	10am-4pm	<input type="checkbox"/> 3	Not applicable	<input type="checkbox"/> 6

Q8	On average, how long does a delivery and collection take?			
	Delivery			
	Less than 10 minutes	<input type="checkbox"/> 1	40 to 50 minutes	<input type="checkbox"/> 5
	10 to 20 minutes	<input type="checkbox"/> 2	50 to 60 minutes	<input type="checkbox"/> 6
	20 to 30 minutes	<input type="checkbox"/> 3	More than 60 minutes	<input type="checkbox"/> 7
	30 to 40 minutes	<input type="checkbox"/> 4		
	Collection			
	Less than 10 minutes	<input type="checkbox"/> 1	40 to 50 minutes	<input type="checkbox"/> 5
	10 to 20 minutes	<input type="checkbox"/> 2	50 to 60 minutes	<input type="checkbox"/> 6
	20 to 30 minutes	<input type="checkbox"/> 3	More than 60 minutes	<input type="checkbox"/> 7
	30 to 40 minutes	<input type="checkbox"/> 4		

Q9	Can you tell me how goods are delivered to and collected from your business?					
	Delivery					
	On pallets	<input type="checkbox"/> 1	In tote boxes	<input type="checkbox"/> 3	Other	<input type="checkbox"/> 5
	In roll cages	<input type="checkbox"/> 2	In loose cartons	<input type="checkbox"/> 4		
	Collection					
	On pallets	<input type="checkbox"/> 1	In tote boxes	<input type="checkbox"/> 3	Other	<input type="checkbox"/> 5
	In roll cages	<input type="checkbox"/> 2	In loose cartons	<input type="checkbox"/> 4		

Q10	Are you responsible for organising your own transport for delivery and collection?		
	Delivery		
	Yes	<input type="checkbox"/> 1	
	No	<input type="checkbox"/> 2	If no, please specify the contractor
	Collection		
	Yes	<input type="checkbox"/> 1	
	No	<input type="checkbox"/> 2	If no, please specify the contractor

Q11	Does your business have off street loading and unloading facilities for deliveries and collection of goods?			
	Delivery			
	Yes	<input type="checkbox"/> 1	No. of spaces	No <input type="checkbox"/> 2
	Collection			
	Yes	<input type="checkbox"/> 1	No. of spaces	No <input type="checkbox"/> 2

If No, go to Q14

Q12	How would you describe the off street loading and unloading facilities for your deliveries and collections?					
	Very poor	Poor	Fair	Good	Very good	Not applicable
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
	Please give an explanation					

Q13	What is the maximum size of vehicle that can access your site?	
	Cars	<input type="checkbox"/> 1
	Small Vans	<input type="checkbox"/> 2
	Single Rear Transit Type Vehicle	<input type="checkbox"/> 3
	2 axles <7.5 tonnes twin rear wheel transit van	<input type="checkbox"/> 4
	2 axles 7.5 to 17 tonnes (with reflective plates)	<input type="checkbox"/> 5
	3 axles (rigid) 17 to 25 tonnes	<input type="checkbox"/> 6
	4 axles (rigid) 25 to 33 tonnes	<input type="checkbox"/> 7
	3 or 4 axles (articulated) up to 33 tonnes	<input type="checkbox"/> 8
	5 or more axles (articulated) over 33 tonne	<input type="checkbox"/> 9

Q14	If you don't have off street loading and unloading facilities how are deliveries to and collections from your premises carried out?

Q15	Do you think there is sufficient space for deliveries, collections and servicing at this site?		
	Yes	<input type="checkbox"/> 1	
	No	<input type="checkbox"/> 2	Please provide details

Q16	Do your premises have off street parking for staff?			
	Yes	<input type="checkbox"/> 1	No. of spaces	No <input type="checkbox"/> 2

If No, go to Q18

Q17	How would you describe the off street parking facilities for your staff?					
	Very poor	Poor	Fair	Good	Very good	Not applicable
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Please give an explanation						

Q18	Do your premises have off street parking for customers?				
	Yes	<input type="checkbox"/> 1	No. of spaces	No	<input type="checkbox"/> 2

If No, go to Q20

Q19	How would you describe the off street parking facilities for your customers?					
	Very poor	Poor	Fair	Good	Very good	Not applicable
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Please give an explanation						

Q20	How would you describe the signage to the business estate within the surrounding road network?					
	Very poor	Poor	Fair	Good	Very good	Not applicable
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Please give an explanation						

Q21	How would you describe the accessibility within the business estate?					
	Very poor	Poor	Fair	Good	Very good	Not applicable
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Please give an explanation						

Q22	Do you provide suppliers and operators with map of the estate indicating the location of your premises?					
	Yes	<input type="checkbox"/> 1				
	No	<input type="checkbox"/> 2				

Q23	Do you advise those making deliveries, collections or servicing about the maximum size of vehicle that can access your site?		
	Yes	<input type="checkbox"/> 1	
	No	<input type="checkbox"/> 2	

Q24	What is your general view of current efficiency, safety and sustainability of freight movements in this business area?		

Q25	Can you tell me of any problems associated with freight movements in this business area?		

Q26	Do you have any suggestions, from your experience, on how to improve freight movements in this business area in terms of efficiency safety and sustainability?		

Q27	Do you think a consolidation centre for distribution of goods would be beneficial to your business? (describe consolidation centre)		

Q28	Does your Organisation have a Delivery and Servicing Plan?		
	Yes	<input type="checkbox"/> 1	Please provide details (explain the plan)
	No	<input type="checkbox"/> 2	

Q29	How long has this business occupied these premises?			
	Less than 6 months	<input type="checkbox"/> 1	Between 2 and 3 years	<input type="checkbox"/> 4
	Between 6 and 12 months	<input type="checkbox"/> 2	Between 3 and 4 years	<input type="checkbox"/> 5
	Between 1 and 2 years	<input type="checkbox"/> 3	4 or more years	<input type="checkbox"/> 6

Q30	How many members of staff (excluding yourself) do you currently employ? If none, enter 000						
	Full time (permanent)				Part time (permanent)		

Thank you for your participation.