

Tolworth Freight Movement Study



Final Report

Prepared for

**Royal Borough of
Kingston upon
Thames
and**



by



Transport & Travel Research Ltd

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Tolworth Freight Movement Study

Report

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EXECUTIVE SUMMARY

To be included once report has been reviewed by client, comments received and final approved version produced.

1 INTRODUCTION

Transport & Travel Research Ltd (TTR) were commissioned by the Royal Borough of Kingston upon Thames (RBK) to carry out research to help better understand and manage freight movements in the Tolworth area. This work was commissioned through the South London Freight Quality Partnership, which is coordinated by TTR.

As mentioned in the Tolworth Centre freight observation survey report already submitted to Kingston upon Thames in June 2008, Tolworth is located 11.1 miles (17.9 km) south west of Charing Cross (in Central London). Tolworth centre is located next to Kingston Bypass on the A3. The principal shopping area is Tolworth Broadway which consists mainly of low-density 1930s semi-detached properties and small to medium-sized commercial and retail developments. The area is dominated by Tolworth Tower, which is just over 80 metres high, with 22 floors. The ground floor of the building is occupied mainly by Marks and Spencer (M&S) and a number of other floors are occupied by Travelodge. The area is also served by a branch rail line running from London Waterloo to Chessington South, two stops to the south.

A number of years ago, the Tolworth Broadway area underwent a regeneration programme. However, there are still significant traffic flows in the area which create a particular challenge and there are now new plans to make further improvements to the area. The Council, in partnership with local businesses, is proposing to redevelop part of the site which would include the removal of the central reservation along Tolworth Broadway, in order to improve accessibility. In order to achieve this in a safe way, the street scene would be redesigned to make it more attractive and traffic speeds calmed to enable the introduction of a 20mph speed limit.

The continued and improved commercial viability of Tolworth Centre is at the heart of the strategy to transform the area. One of the crucial aspects of the successful operation of local businesses is the provision for servicing in terms of delivery and collection activity.

The earlier observation report submitted to RBK in June 2008 included findings on all aspects of the use of the highway relating to freight movements. The findings and recommendations of the observation survey report helped to inform this subsequent detailed survey work. The approach to this survey work was agreed in December 2008 and this report provides the findings of extensive consultation with businesses in the Tolworth area.

This report contains the description of the methodology statement and survey approach in Chapter 2, survey findings and analysis in Chapter 3, a summary of the observation study in section 4 and recommendations in Chapter 5. The questionnaire and covering letter used in the business consultation are attached in Annex A and B, respectively. Annex C contains a breakdown of questionnaire responses by street name.

2 SURVEY METHODOLOGY

The survey methodology was devised and agreed with the client 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 Tolworth 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 The study aim

- To apply the most suitable market research approach to identify and analyse freight movements in Tolworth Broadway

2.2 Objectives

- To identify retailers' and other businesses' requirements, perceptions and experiences of delivery, collection and servicing in Tolworth Broadway
- To establish an understanding of delivery, collection and servicing patterns to shops and other businesses and an improved understanding of freight movements in Tolworth Broadway
- To offer recommendations on effective management and rationalisation of freight movements to shops and other businesses in Tolworth Broadway

2.3 Research approach

Our knowledge and experience of managing the South London Freight Quality Partnership was used in the development of the research methodology.

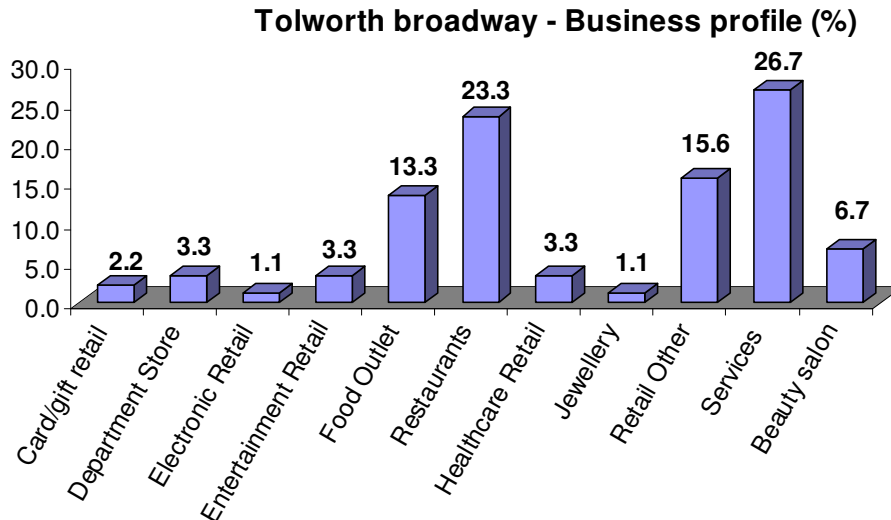
A comprehensive research approach was used, which involved collating both quantitative and qualitative data, using a face-to-face questionnaire with retailers and other businesses in Tolworth Broadway. The questionnaire was designed to provide information to meet all objectives specified in the methodology statement.

During week commencing 5/1/09, a letter explaining the purpose of the survey was circulated by RBK to all businesses in the study area. This letter is included in this report as Annex A. Following the circulation of the introductory letters, shops and other businesses were contacted by telephone, reminding them of the forthcoming survey and trying to arrange a suitable time to conduct interviews. These calls began during week commencing 12/1/09.

According to the Tolworth Centre freight observation survey (June 2008), businesses in the study area mainly comprise restaurants and services (together they make up

around 50% of businesses in the area). Restaurants represent almost 25% of business activity. Figure 2.1 shows Tolworth Broadway business profiles.

Figure 2.1: Tolworth Broadway Business Profile



2.3.1 Sample Size

The aim of the study was to conduct interviews with as many businesses and retailers in the study area as possible. As agreed in the study methodology, two attempts were made to try to secure an interview with each business. A target was set to conduct 30 face-to-face interviews as well as telephone interviews where appropriate. If deemed necessary to encourage responses, it was agreed that questionnaires could be dropped off at premises for completion and subsequently collected.

2.3.2 Dates of Surveys

The interviews were conducted on the following dates:

- Tuesday 20th January 2009
- Friday 23rd January 2009
- Tuesday 27th January 2009
- Friday 30th January 2009
- Tuesday 3rd February 2009
- Friday 6th February 2009

2.3.3 Questionnaire

TTR drafted a questionnaire (included as Annex B) which was submitted to RBK for review and approval. A selection of the key aspects covered in the questionnaire, included:

- views on signage, parking, enforcement and accessibility
- types of goods delivered/collected

- frequency of delivery and collection activity and time of day of delivery and collection activity
- what types of vehicles used
- where loading and unloading can take place
- availability of rear access facilities
- where delivery staff usually load and unload
- the average amount of time it takes to load and unload
- operation of own vehicle fleet, if so, what vehicles
- businesses' views about problems facing freight movement in Tolworth Broadway and how movements could be improved to be more efficient, safer

2.3.4 Analysis and Reporting

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.

The results of the quantitative and qualitative analysis were analysed and interpreted and included within the project report, along with a set of resulting recommendations, designed to help improve freight management within Tolworth.

2.3.5 Risk Assessment

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

2.3.6 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 for the purposes of this project.

2.3.7 Our Interviewees

All our interviewees 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 members 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.

2.3.8 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.

2.3.9 Additional Research

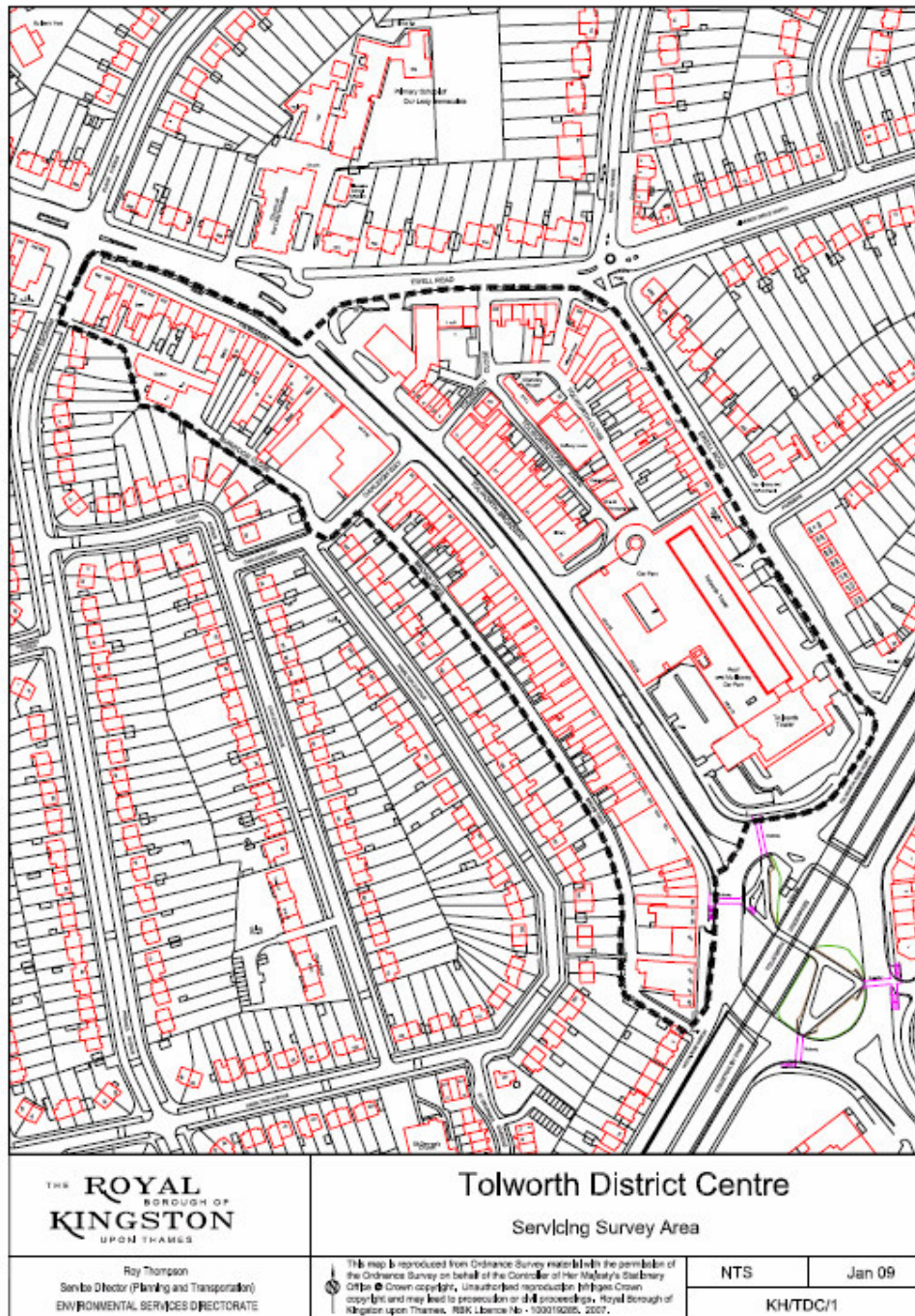
In addition to the interviews, we have referred to findings and recommendations of the Tolworth Centre observation report (submitted to RBK June 2008) to add value to this exercise.

3 SURVEY FINDINGS AND ANALYSIS

3.1 Introduction

TTR was provided with a list of business addresses in the Tolworth area by RBK, along with a site plan showing the survey area. A plan of the study area is included below as Figure 3.1.

Figure 3.1: Plan of Tolworth Broadway survey area



Following a project team briefing meeting and site visit held on Tuesday 6 January 2009, it was found that this business contact list was incomplete and out of date. Therefore, a TTR consultant spent a day in the Tolworth study area checking business names and updating the database accordingly. Following this, the missing telephone numbers were added to the list and the database was cleansed and prioritised.

Once the list had been updated and cleansed, it was agreed with RBK. Following this, appointment telephone calls, face-to-face surveys and follow-up telephone surveys were carried out, as outlined below.

Table 3.1: Summary of contact made with Tolworth businesses

Date	Activity
Tuesday 13 th January / Friday 16 th January	Telephone calls made to all businesses to make appointments for face-to-face or telephone interviews
Tuesday 20 th January / Friday 23 rd January	Face-to-face interviews took place in the Tolworth area
Tuesday 27 th January / Friday 30 th January	Face-to-face interviews took place in the Tolworth area. Some telephone interviews conducted, where face-to-face interviews were not possible
Tuesday 3 rd February / Friday 6 th February	As agreed target for face-to-face interviews had been exceeded, telephone interviews were undertaken with remaining businesses where feasible

The cleansed business database contained 157 records. However, 12 businesses were found to have moved away from the area or the telephone number was unobtainable. Furthermore, 22 businesses were based in Tolworth Tower and it was agreed that these businesses would not be contacted individually. In discussions with the client, it was agreed that an interview would be conducted with Jeremy Dowding, manager of Tolworth Tower, who was able to provide an overview of deliveries to Tolworth Tower as a whole and, therefore, it was not deemed necessary to contact these individual businesses separately.

The remaining 123 businesses were all contacted at least twice and TTR managed to significantly exceed the target of 30 face-to-face interviews. Below is a summary of the contact made and the interviews completed. This information is also provided in Table 3.2(a) and broken down by location in Table 3.2 (b).

- A total of 66 interviews were completed (22 telephone interviews and 44 face-to-face interviews)
- 34 were unobtainable (two attempts were made at telephone contact)
- 21 declined the survey
- 2 businesses started a survey which was not completed.

Table 3.2 (a): Summary of contact made with Tolworth businesses

Contact made	Number	%
Telephone interviews	22	14
Face to Face interviews	44	28
Surveys started but not completed (if not relevant or if interviewee found to be unwilling)	2	1
Called twice - unobtainable	34	22
Declined survey	21	13
Phone number not found / business no longer exists	12	8
Tolworth Tower businesses agreed not to interview	22	14
Total	157	100

Table 3.2 (b): Summary of interviews carried out according to location

Street	Completed surveys	Surveys started but not completed	Declined survey	Called twice - unobtainable	Total
The Broadway	29	0	4	9	42
Tolworth Broadway	15	1	11	15	42
Ewell Road	13	1	3	4	21
Tolworth Close	5	0	2	5	12
Tolworth Tower	3	0	1	1	5
Burwood Close	1	0	0	0	1
Total	66	2	21	34	

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.

3.2 Survey Sample

3.2.1 Interviews by location

Interviews were conducted in the following locations. As shown in Table 3.3, most businesses were located on The Broadway (29 businesses) or Tolworth Broadway (15 businesses), with 13 businesses located on Ewell Road.

Table 3.3: Businesses by location

Location	Number of participating businesses
The Broadway	29
Tolworth Broadway	15
Ewell Road	13
Tolworth Close	5
Tolworth Tower	3
Burwood Close	1
Total	66

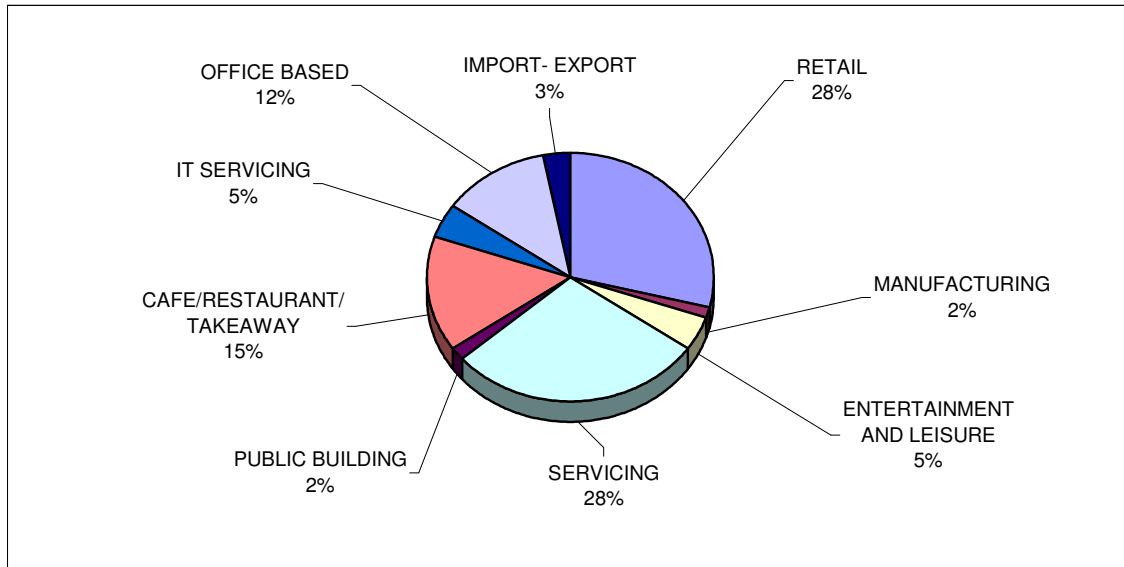
3.2.2 Business profile

Table 3.4 and Figure 3.1 show the profile of all businesses which participated in the surveys. They are grouped into 11 categories according to the nature of their trade. As shown in the table, most businesses were in the retail (19 businesses) and servicing (19 businesses) categories.

Table 3.4: Business profile

Business sector	Number of participating businesses
Retail	19
Servicing	19
Cafe / Restaurant / Takeaway	10
Office based	8
Entertainment and Leisure	3
IT servicing	3
Import - Export	2
Manufacturing	1
Public Building	1
Total	66

Figure 3.1: Business profile



3.2.3 Business hours

As shown in Tables 3.5(a) and 3.5(b), the majority of businesses open for trading at a time between 08:00 and 10:00 and close at a time between 15:00 and 19:00, while very few close after 21:00. As shown in Table 3.6, of the 66 businesses, 6% are open 24 hours a day, seven days a week. 91% are open on Mondays, 92% are open Tuesday to Friday, 68% are open on Saturdays and 36% are open on Sundays.

Table 3.5 (a): Opening hours Monday - Sunday

Day	00:01 - 06:00	06:01 - 08:00	08:01 - 10:00	10:01 - 12:00	12:01 - 14:00	14:01 - 18:00	18:01 - 00:00	Total
Monday	1	16	38	5	0	0	0	60
Tuesday	1	16	39	5	0	0	0	61
Wednesday	0	17	39	5	0	0	0	61
Thursday	0	17	39	5	0	0	0	61
Friday	0	17	39	5	0	0	0	61
Saturday	1	11	28	5	0	0	0	45
Sunday	1	15	8	0	0	0	0	24

Table 3.5 (b): Closing hours Monday - Sunday

Day	00:01 - 06:00	06:01 - 12:00	12:01 - 15:00	15:01 - 17:00	17:01 - 19:00	19:01 - 21:00	21:01 - 00:00	Total
Monday	0	0	1	17	24	8	10	60
Tuesday	0	0	1	17	24	9	10	61
Wednesday	0	0	2	18	23	8	10	61
Thursday	0	0	1	17	25	8	10	61
Friday	1	0	1	17	25	7	10	61
Saturday	2	3	4	11	11	5	9	45
Sunday	0	0	3	7	2	3	9	24

Table 3.6: % of businesses open by weekdays

Day	Open	Closed	24 Hours	Did not Answer	Total
Monday	90.9%	0.0%	6.1%	3.0%	100.0%
Tuesday	92.4%	0.0%	6.1%	1.5%	100.0%
Wednesday	92.4%	0.0%	6.1%	1.5%	100.0%
Thursday	92.4%	0.0%	6.1%	1.5%	100.0%
Friday	92.4%	0.0%	6.1%	16.7%	100.0%
Saturday	68.2%	9.1%	6.1%	16.7%	100.0%
Sunday	36.4%	33.3%	6.1%	24.2%	100.0%

3.2.4 Length of time at premises

As shown by Table 3.7, the majority of businesses (79%) have occupied their premises for 4 years or more. 9% of businesses have occupied their premises between 1 and 2 years and 11% of businesses have occupied their premises for between 2 and 4 years.

Table 3.7: Length of time at premises

Time period	No. of businesses	%
Less than 6 months	1	1.5%
1 -2 years	6	9.1%
2 -4 years	7	10.6%
4 or more years	52	78.8%
Total	66	100.0%

3.2.5 Number of staff employed

As shown in Table 3.8, the majority of businesses in the area are small businesses with between 0 and 9 employees. 73% of the businesses said that they have between 0 and 9 full-time employees, while 83% of businesses said they have between 0 and 9 part-time employees. Only 6 businesses said that they employ over 6 members of staff.

Table 3.8: Number of staff employed

Full Time			Part Time		
No of employees	No of responses	%	No of employees	No of responses	%
0 - 9	48	72.7%	0 - 9	55	83.3%
10 - 19	3	4.5%	10 - 19	2	3.0%
20 - 29	1	1.5%	20 - 29	1	1.5%
40 - 250	1	1.5%	40 - 250	1	1.5%
More than 250	1	1.5%	More than 250	1	1.5%
Total	54	81.8%	Total	60	90.9%
N/A	12	18.2%	N/A	6	9.1%
Total	66	100.0%	Total	66	100.0%

3.3 Delivery and collection activities

3.3.1 Delivery and collection patterns

Daily delivery frequency

Table 3.9 shows the frequency of daily deliveries and shows that the majority of businesses (41%) receive between 1 and 3 deliveries a day, as detailed below:

- 27 (41%) businesses receive between 1 and 3 deliveries a day
- 2 (3%) businesses have between 4 and 5 deliveries a day
- 3 (5%) businesses said they receive more than 10 deliveries a day
- 1 (1.5%) business said they receive up to 1 delivery on a daily basis, excluding post deliveries and only 1 (1.5%) business said they receive 1 delivery a day which is the Post Service
- 8 (12%) businesses said they do not receive daily deliveries
- 22 (33%) businesses said they do not receive deliveries on a daily or a weekly basis

Daily collection frequency

Table 3.9 shows the frequency of daily collections and illustrates that 21% of businesses have between 1 and 3 daily collections.

- 13 (21%) businesses have between 1 and 3 daily collections
- 3 (5%) businesses have between 4 and 5 daily collections
- 3 (5%) have daily Home Deliveries
- 2 (3%) businesses have collections on an ad hoc basis
- 4 (7%) businesses have more than 10 collections daily
- 21 businesses (34%) have no daily collections, while 15 (25%) do not have weekly collections either

Table 3.9: Daily delivery and collection patterns

Delivery			Collection		
Deliveries Daily	Number of businesses	%	Collections Daily	Number of businesses	%
0	8	12.1%	0	21	34.4%
Up to 1	1	1.5%	1 - 3	13	21.3%
1 - 3	27	40.9%	4 - 5	3	4.9%
4 - 5	2	3.0%	6 - 7	0	0.0%
6 - 7	1	1.5%	8 - 9	0	0.0%
8 - 9	1	1.5%	More than 10	4	6.6%
More than 10	3	4.5%	N/A* -	15	24.6%
N/A* -	22	33.3%	Ad Hoc	2	3.3%
Post	1	1.5%	Home Deliveries	3	4.9%
Total	66	100.0%	Total	61	92.4%

- includes where deliveries are not daily or weekly

Weekly delivery frequency

Table 3.10 shows weekly deliveries and shows that most businesses (32%) receive between 1 and 5 deliveries in a week:

- 21 businesses (32%) receive between 1 and 5 deliveries in a week
- 18 (28%) receive between 6 and 10 deliveries in a typical week
- 4 (6%) receive between 21 and 30 deliveries in a typical week
- 5 (8%) receive more than 30 deliveries in a typical week (which potentially leads to a significant amount of increase in traffic levels and vehicles movements)
- 6 (businesses (9%) receive deliveries less frequently than weekly

Weekly collection frequency

Table 3.10 shows weekly collections and shows that most businesses (25%) have between 1 and 5 weekly collections with 20% having between 6 and 10 weekly collections.

- 16 (25%) businesses have between 1 and 5 weekly collections
- 13 (20%) businesses have between 6 and 10 weekly collections
- 3 (5%) businesses have between 11 and 20 weekly collections
- 2 (3%) businesses have between 21 and 30 weekly collections
- 1 (2%) business generates 200 Home Deliveries
- 1 business (2%) has less than 1 weekly collection
- 3 (5%) businesses have weekly waste collections

Table 3.10: Weekly delivery and collection pattern

Delivery			Collection		
Deliveries Weekly	Number of businesses	%	Collections Weekly	Number of businesses	%
0	0	0.0%	0	15	23.4%
1 - 5	21	32.3%	1 - 5	16	25.0%
6 - 10	18	27.7%	6 - 10	13	20.3%
11 - 20	11	16.9%	11 - 20	3	4.7%
21 - 30	4	6.2%	21 - 30	2	3.1%
More Than 30	5	7.7%	More Than 30	4	6.3%
Less Than Weekly	6	9.2%	Less Than Weekly	1	1.6%
Not Applicable	1	1.5%	Not Applicable	8	12.1%
Total	65	98.5%	Home Deliveries	1	1.6%
Total	66	100.0%	Total	66	100.0%

3.3.2 Busiest day for deliveries and collections

Businesses were asked to identify the busiest day for deliveries and collections of goods. Most businesses gave more than one response to this question and indicated that more than one day of the week was particularly busy for delivery and collection activity.

Deliveries

17 (25.8%) business responded to this question and identified which is their busiest day for deliveries. As shown by Table 3.11, Monday is the day when most of the businesses (41%) receive deliveries, followed by Tuesday (36% of respondents) and Friday (35% of respondents). Saturday is the busiest day for only 12% of the businesses. 71% of the respondents said there is not a busiest day for deliveries, which means that more than half of the businesses interviewed have their delivery activity relatively equally proportioned during the week and were unable to identify a specific peak.

Collections

8 (12%) businesses responded to this question and identified which is their busiest day for collections. As shown by Table 3.11, Fridays and Saturdays are the busiest days for collections (50% of respondents in each case). 33 (50%) respondents said that there is not a busiest day for collections which means that their activity is relatively equally proportioned during the week and were unable to identify a specific peak.

Table 3.11: Busiest day for deliveries and collections

Delivery			Collection		
Day	Number of businesses	%	Day	Number of businesses	%
Monday	7	41.2%	Monday	2	25.0%
Tuesday	6	35.3%	Tuesday	1	12.5%
Wednesday	4	23.5%	Wednesday	1	12.5%
Thursday	5	29.4%	Thursday	1	12.5%
Friday	6	35.3%	Friday	4	50.0%
Saturday	2	11.8%	Saturday	4	50.0%
Sunday	1	5.9%	Sunday	1	12.5%
There is no busiest day	47	71.2%	There is no busiest day	33	50.0%
N/A	2	3.0%	N/A	25	37.9%
Total	66	100.0%	Total	66	100.0%

3.3.3 Period during which deliveries and collections take place

Businesses were asked to indicate the period of time during which the majority of deliveries and collections take place. As shown by Table 3.12, the majority of the businesses (42%) receive most deliveries between 10:00 and 16:00, with 34% having their deliveries between 07:00 and 10:00 in the morning. Very few businesses have deliveries before 07.00 (4.7%) and no businesses have deliveries after 19.00. 20% of businesses said the delivery time varies.

As shown by Table 3.12, the majority of businesses (30%) have collections made between 10:00 and 16:00, with 17% of businesses having collections made between 07.00 and 10.00. Very few businesses have collections before 07.00 (2%) or after 19.00 (6%).

Table 3.12: Period during which deliveries and collections take place

Deliveries			Collections		
Time	No. of businesses	%	Time	No. of businesses	%
Before 07:00	3	4.7%	Before 07:00	1	1.9%
07:00 – 10:00	22	34.4%	07:00 – 10:00	9	17.3%
10:00 – 16:00	27	42.2%	10:00 – 16:00	15	28.8%
16:00 – 19:00	0	0.0%	16:00 – 19:00	7	13.5%
Until lunchtime only	1	1.6%	Until lunchtime only	1	1.9%
After 19:00	0	0.0%	After 19:00	3	5.8%
It varies	13	20.3%	It varies	8	15.4%

3.3.4 Length of deliveries and collections

As shown by Table 3.13, nearly all deliveries and collections take less than 20 minutes to complete, with the majority of the businesses (48%) indicating deliveries take less than 10 minutes to complete and 42% of businesses indicating collections take less than 10 minutes to complete. 34% of businesses indicated that deliveries take between 10 and 20 minutes to complete and 15% of businesses indicated that collections take between 10 and 20 minutes to complete. It should be noted however, that 5% of businesses have deliveries which take more than 1 hour to complete.

Table 3.13: Length of deliveries and collections

Delivery			Collection		
Length of time Min.	Number of businesses	%	Length of time Min.	Number of businesses	%
0 - 10	31	48.4%	0 - 10	28	42.4%
10 - 20	22	34.4%	10 - 20	10	15.2%
20 - 30	5	7.8%	20 - 30	0	0.0%
30 - 40	1	1.6%	30 - 40	1	1.5
40 – 50	1	1.6%	40 – 50	0	0.0%
50 - 60	1	1.6%	50 - 60	0	0.0%
> 60	3	4.7%	> 60	0	0.0%
Varies	1	1.6%	Varies	0	0.0%
Reponses to this question	64	97.0%	Reponses to this question	39	51.1%

3.4 Method and type of delivery / collection

3.4.1 Own vehicles for deliveries and collections

39% of businesses use their own vehicles for deliveries and collections. As shown by Table 3.14, of these businesses, the most commonly used vehicle is a van. 17 businesses indicated that they use a van for deliveries and collections. 1 business uses its own Rigid Goods vehicles for deliveries and collections and 9 businesses (34%) use cars for deliveries and collections.

Table 3.14: Most commonly used type of vehicle for deliveries and collections

Number of Vehicles Used	Van	Rigid Goods Vehicle	Other - Cars
	No of businesses		
1	12	1	4
2	1	0	1
3	2	0	0
4	0	0	1
12	0	0	1
Unspecified	0	0	1
30*	0	0	1
Unquantified	2	0	0
Total	17	1	9

* Saxon Cars Services which offers passengers and courier transport services uses 10 cars and has another 20 cars sub-contracted.

3.4.2 Responsibility for deliveries and collections

The 26 (39%) businesses that use their own vehicles for deliveries and collections were asked what proportion of all deliveries and collections they carry out themselves, using their own vehicles.

Table 3.15 illustrates that over 60% of businesses use their own vehicle for more than half of their deliveries and collections, with 21% carrying out around half (50 – 59%) of their deliveries and collections and 25% of businesses carrying out 90%-100% of deliveries and collections using their own vehicles.

Table 3.15: Percentage of businesses that carry out their own deliveries and collections using their own vehicles

Percentage of businesses that carry out their own deliveries and collections using their own vehicles		
% of deliveries and collections	Number of businesses	% of businesses
1 - 9	1	4.2
10 - 19	2	8.3
20 - 29	4	16.7
30 - 39	0	0.0
40 - 49	2	8.3
50 - 59	5	20.8
60 - 69	2	8.3
70 - 79	1	4.2
80 - 89	1	4.2
90 - 99	3	12.5
100	3	12.5
Total no of businesses	24	92.3
Did not quantify	2	7.7%
Total	26	100.0%

3.4.3 Types of vehicles used for deliveries and collections

Businesses were asked what types of vehicles are used for deliveries to and collections from their premises.

Deliveries

As shown by Table 3.16, the majority of businesses (77%) indicated that deliveries are made using vans, 40% indicated that deliveries are made using Rigid Goods vehicles and 9% said that deliveries are made using articulated goods vehicles. 3% of businesses said that deliveries are made using cars and the other 3% said that deliveries are made using bikes.

Collections

The majority of businesses indicated that collections are made using vans (76%), 20% using Rigid Goods vehicles, 15% using cars, 7% using Articulated Goods vehicles and 7% using bikes.

Table 3.16: Type of vehicles used for deliveries and collections

Delivery			Collection		
Vehicles Used	Number of businesses	%of Respondents	Vehicles	Number of businesses	%of Respondents
Vans	50	76.9%	Vans	31	75.6%
Rigid Goods	26	40.0%	Rigid Goods	8	19.5%
Articulated	6	9.2%	Articulated	3	7.3%
Other Unspecified	2	3.1%	Other Unspecified	1	2.4%
Other - Cars	2	3.1%	Other - Cars	6	14.6%
Other - Bikes	2	3.1%	Other - Bikes	3	7.3%
Total No of Businesses Responded	65	98.5%	Total No of Businesses Responded	41	62.1%
Unquantified	1	1.5%	Unquantified	25	37.9%
Total	66	100.0%	Total	66	100.0%

3.4.4 Most commonly used vehicle type

Businesses were also asked to indicate the most commonly used vehicle. Some respondents indicated more than one most commonly used type of vehicle.

As shown by Table 3.17, the most commonly used vehicle type is vans for both deliveries (69%) and for collections (74%). For deliveries, the second most commonly used vehicles are rigid goods vehicles (33%).

For collections, the second most commonly used vehicles for collections are rigid goods vehicles (10% of businesses indicated this) and cars (10% of businesses indicated this).

Table 3.17: The most commonly used type of vehicle for deliveries and collections

Delivery			Collection		
Most commonly used vehicle	Number of businesses	%of respondents	Most commonly used vehicle	Number of businesses	%of respondents
Vans	45	69.2%	Vans	29	74.4%
Rigid Goods	22	33.8%	Rigid Goods	4	10.3%
Articulated	1	1.5%	Articulated	1	2.6%
Other Unspecified	2	3.1%	Other Unspecified	1	2.6%
Other – Cars	2	3.1%	Other – Cars	4	10.3%
Other - Bikes	1	1.5%	Other - Bikes	1	2.6%
Unquantified	1	1.5%	Unquantified	27	40.9%
Total No of Businesses Responded	65	98.5%	Total No of Businesses Responded	39	59.1%

3.4.5 Method of handling goods

As shown by Table 3.18, the majority of businesses have goods delivered and collected in loose cartons (65%) and on pallets (32%). 41% of businesses indicated that they have goods collected in loose cartons.

A small number of businesses receive deliveries in roll cages (14%) or tote boxes (6%). 7% of businesses use roll cages and 7% use tote boxes for collections.

15 (23%) businesses handle goods for deliveries in other categories, such as bags and boxes, while 22 (54%) businesses handle the goods for collections in other categories, such as bags, boxes, loose loads, clear sacks, security boxes, pizza boxes, envelopes and barrels.

Table 3.18: Method of handling goods

Delivery			Collection		
Method	Number of businesses	%	Method	Number of businesses	%
On pallets	21	32.8%	On pallets	0	0.0%
In roll cages	9	14.1%	In roll cages	3	7.3%
In tote boxes	4	6.3%	In tote boxes	3	7.3%
In loose cartons	42	65.6%	In loose cartons	17	41.5%
Other	15	23.4%	Other	22	53.7%
Total no of businesses that identified method	4	97.0%	Total no of businesses that identified method	41	62.1%
Unquantified	2	3.0%	Unquantified	25	37.9%

3.4.6 Range of goods

Businesses were asked to indicate the type or variety of goods delivered to and collected from their businesses. Table 3.19 illustrates the wide range of goods delivered to and collected from businesses. As shown by Table 3.19, the majority of deliveries were for drinks (23 responses), food (21 responses) and stationery and office equipment (17 responses).

Table 3.19: Range of goods delivered to and collected from businesses

Type of delivery / collection	Number of responses
Drinks	23
Food	21
Stationery and Office Equipment (includes Print Cartridges)	17
Sanitary Ware and Cleaning Products (including chemicals and gloves)	11
Books, Newspapers, Magazines	7
Post and Paperwork Documents	6
Goods specific for certain stores (Furniture Store, Optician, Bathroom Fitters, Kitchen Fitter, Fireplace Store, Glass Factory)	6
Samples and Marketing Materials (posters, leaflets)	5
Gifts and Cards	5
Clothes and Accessories	5
Health and Beauty Products (including supplies for Pharmacy and Hair Care)	4
General Household and Kitchen Ware (no defined categories)	4
IT Hardware	3
Cash	3
Laundry and Linen	3
Pizza Boxes	3
Electrical and Electronic Goods	3
Special Handling Goods (Gas Canisters, Beer Kegs)	3
Confectionery	2
Tools, Ladders and Building Equipment and Supplies	2
Tobacco	2
Hangers and Plastics	2
Automotive Parts	2
Toys	2
Catering Equipment	1
Flowers and Plants	1

3.4.7 Organising transport for deliveries and collections

Businesses were asked whether they were responsible for organising their own transport for deliveries and collections. As shown by Table 3.20, only 22% of businesses organise their own transport for deliveries. There is an equal split for collections, as 50% of businesses are responsible for organising own transport for collections.

Table 3.20: Organising own transport for deliveries and collections

Answer	Deliveries		Collections	
	Number of responses	Percent	Number of responses	Percent
Yes	14	21.9%	20	50.0%
No	50	78.1%	20	50.0%
Total	64	97.0%	40	60.6%
N/A	2	3.0%	26	39.4%
Total	66	100.0%	66	100.0%

3.4.8 Control of deliveries and collections

Those businesses that indicated that they were not responsible for organising their own deliveries and collections were asked to indicate who is responsible. Most businesses indicated that one or more parties (Head Office, supplier, or the customer) have control over their deliveries and collections. As shown in Table 3.21, 70% of the businesses responding to this question indicated that the supplier is responsible for organising the transport for deliveries and 12.5% said the Head Office is responsible. For collections, 40% of businesses said the Head Office is responsible and 25% of businesses said that the supplier is responsible for organising transport for collections.

Table 3.21: Control of deliveries and collections

Type of Control	Deliveries		Collections	
	Number of responses	%	Number of responses	%
Head/Admin Office/Internal	6	12.5%	8	40.0%
Supplier	36	70.5%	5	25.0%
Third Party Logistics Operator	2	4.2%	0	0.0%
Individual Companies/Private individuals / Customers	3	6.3%	1	5.0%
N/A	1	2.1%	0	0.0%
Council (including waste)	0	0.0%	3	15.0%
Unquantified	2	4.0%	4	20.0%
Total no of businesses that do not control deliveries and collections	50	100.0%	20	100.0%

3.5 Loading facilities

3.5.1 Off-street loading and unloading facilities

As shown by Table 3.22, the majority of businesses do have off-street facilities available for deliveries (69% of businesses) and collections (65% of businesses).

Table 3.22: Off-street loading and unloading facilities

Response	Deliveries		Collections	
	Number of businesses	%	Number of businesses	%
Yes	46	69.7%	26	65.0%
No	20	30.3%	14	35.0%
Total	66	100.0%	40	60.6%
Missing	0	0.0%	26	39.4%
Total	66	100.0%	66	100.0%

Those businesses with off-street facilities for deliveries and collections were asked to indicate the number of spaces they have available. As shown by Table 3.23, the majority of businesses have just one space available (46.7% for deliveries and 41.7% for collections). 23% of businesses said they had 2 spaces for deliveries, while 17% of businesses said they had 2 spaces for collections. Only 1 business (Iceland) said they had 20 spaces for deliveries and collections.

Table 3.23 Number of off-street loading and unloading spaces for deliveries and collections

Number of off street spaces	Deliveries		Collections	
	Number of businesses	%	Number of businesses	%
1	14	46.7%	5	41.7%
2	7	23.3%	2	16.7%
3	2	6.7%	1	8.3%
4	3	10.0%	1	8.3%
5	2	6.7%	1	8.3%
7	1	3.3%	1	8.3%
20	1	3.3%	1	8.3%
Total	30	65.2%	12	46.2%
Missing	16	34.8%	14	53.8%
Total	46	100.0%	26	100.0

3.5.2 Issues relating to off-street loading and unloading facilities

Those businesses with off-street facilities for deliveries and collections were asked to indicate the main issues associated with the use of the off-street loading and unloading facilities. Table 3.24 illustrates the various responses to this question, which are summarised below:

- 21 businesses said they have problems with the uneven surface of the roads
- 16 businesses said they have access issues such as congestion at delivery times
- 16 businesses said that they don't have any issues and further actions for improvement are not necessary
- 14 businesses said they have parking problems such as illegal parking and spaces being blocked by non-tenants
- 10 businesses had problems such as fly tipping, waste and rubbish left uncollected

Table 3.24: Issues relating to the use of off-street loading and unloading facilities

Types of comment	Number of responses	Quotes
Uneven surfaces and potholes	21	Uneven surfaces - wear and tear as more tenants move in
Access issues for goods vehicles, congestion at delivery times	16	Access - completely blocked by artics in service road behind property. Illegal parking in businesses' spaces. Uneven surface
No problems or issues for action	16	
Parking problems (includes illegal parking, spaces blocked by non-tenants)	14	Access - completely blocked by artics in service road behind property. Illegal parking in businesses' spaces.
Rubbish, waste and fly-tipping (including cleanliness of access roads)	10	Access – illegal parking. Waste being left in the Close. Vehicles left overnight blocking the Close. Vehicles left during the day blocking the Close
Anti-Social Behaviour	3	Fly-tipping, uneven surfaces, potholes, access can be blocked by deliveries to greengrocers, cars have been broken into & burnt out – ongoing
Blocked drains	2	Uneven, very poor surface in road (access road) behind post office. Blocked drains in same road.
Parking restrictions impacting on customers	2	Parking can be an issue. Customers bring items into store for repair, use front entrance & park on street. They can get parking tickets if they are delayed in shop
Use of service roads by private cars	1	Private cars using service road as short cut - problems with deliveries, uneven road surface
N/A	1	
Unquantified	16	
Total Number of Respondents	50	

3.5.3 How deliveries and collections are carried out

Businesses without off-street loading and unloading facilities were asked to state how deliveries to and collections from their premises are carried out. As shown by Table 3.25, for the majority of businesses (47%), vehicles undertaking loading and unloading activities stop and park directly in front of their premises. 38% use the service area at the back of the premises, 14% stop up 20 metres away from the business premises and 14% have to park more than 20 metres away from the front of the premises.

Table 3.25 Location of delivery and collection activities

Location	Number of Businesses	Percentage
Directly in front of the premises	31	47.0%
Not directly outside, but up to 20m away	9	13.6%
More than 20m from the front of the shop	9	13.6%
Service area at the back of the premises	25	37.9%
Service road at the front of the premises	3	4.5%
Side road	4	6.1%
N/A	0	0.0%
Other	3	4.5%
Total	66	100.0%

3.5.4 Legal loading restrictions

Businesses were asked whether current restrictions allow legal loading to take place from the road directly outside the premises. As shown in Table 3.6, the majority of businesses (37%) said that loading and unloading activities are not allowed at all in front of the premises. 23% of businesses said that the loading and unloading activities are allowed on the road directly in front of the premises all day. 23% said that they did not know if loading and unloading activities were allowed directly in front of the premises. Only 11% of the businesses said that loading and unloading activities are allowed on the road in front of the premises for part of the day (this would imply that loading and unloading restrictions are enforced in this area).

Table 3.26: Legal loading allowed on the road directly in front of the premises

Legal loading in front of the premises	Number of businesses	%
All day	13	22.8%
Part of the day	6	10.5%
No loading at all	21	36.8%
Don't know	13	22.8%
N/A	4	7.0%
Total	57	86.4%
Missing	9	13.6%
Total	66	100.0%

3.5.5 Impact of legal loading restrictions

Businesses were asked to what extent loading restrictions and their enforcement affect deliveries to their businesses. As shown in Table 3.27, the majority of businesses (59%) are not affected at all by the enforcement of loading and unloading restrictions. 15% of businesses are affected 'negatively a lot' and 15% are affected 'negatively a little' by the enforcement of loading and unloading restrictions.

Table 3.27: Businesses affected by loading and unloading restrictions

Affected by the Restrictions	Number of businesses	%
Negatively a lot	10	15.4%
negatively a little	10	15.4%
Not at all	38	58.5%
N/a	7	10.8%
Missing	1	1.5%

Table 3.28 illustrates the opinions as to how loading and unloading restrictions impact on businesses. Comments made by businesses include that, due to parking restrictions, delivery drivers use the bus stop and some suppliers won't actually deliver to their premises. The provision of more loading bays was requested. Other businesses indicated that, due to the nature of their business, they were not affected directly by loading restrictions.

Table 3.28: Opinions about the way in which businesses are affected by loading and unloading restrictions

To what extent do current loading restrictions and their enforcement affect deliveries to your business?	Opinion
Negatively a little	So few deliveries that it doesn't seem to matter
Negatively a lot	A loading bay would be a great solution
Negatively a lot	Drivers cannot always find space on slip road & so park at the back, they still have to bring deliveries in through the front
Negatively a lot	Some suppliers won't deliver because of parking restrictions
Negatively a lot	Suppliers risk getting a ticket. Suppliers park in bus stop. Some suppliers won't deliver
Not at all	Does not affect deliveries but does affect pizza collection
Not at all	Uses back access roads for deliveries

3.6 Information available

3.6.1 Signage in the Tolworth area

Businesses were asked how they would describe signage to the Tolworth area within the surrounding road network. As shown in Table 3.29, the majority of businesses (39%) said that the signage in Tolworth Area was "Fair". 26% of businesses said that signage was "Good". However, 18% of businesses described it as "Poor" and 3% of businesses described it as either "Very Poor" or "Very Good" respectively. When asked for further views on signage in the Tolworth area, most businesses (18) said they do not have any issues with the existing signage or had positive comments about the signage (10 businesses). However, 12 businesses said that they would like improvements to the signage at a local level or for specific areas (specifically just before the A3 exit, on the exit from the M&S car park, Tolworth Broadway and Ewell Road), while 5 businesses said they would like signage improvements in general.

2 other businesses wanted better signage, as drivers currently have to stop and ask for directions.

Table 3.29: Description of signage in Tolworth area

Response	Number of businesses	%
Very poor	2	3.0%
Poor	12	18.2%
Fair	26	39.4%
Good	17	25.8%
Very good	2	3.0%
N/a	4	6.1%
Missing	3	4.5%
Total	66	100.0%

Table 3.30: Responses of businesses on signage in Tolworth area

Category	Number of businesses	Specific Locations	Quotes
Clearly Signposted and Marked, as is red route	1		Clear signage. Red route obvious. Car parking clearly marked
Car parks clearly marked	1		Car parking clearly marked
All drivers use GPS/Sat Navigation	2		All drivers have GPS
Red-light Running	1		Cars going through red lights on Tolworth Broadway at pedestrian crossings
Better signage at roundabouts	1		Drivers unsure of which direction at roundabout, business is close to roundabout
Better signage at a local level	6	Just before A3 Exit, on exit M&S Car Park	No sign for Tolworth except on A3
Not enough signage for specific areas	6	Tolworth Broadway, Ewell Road	Not enough signage - for Broadway for example
Parking restrictions	2		Confusing for customers
No problems/issues with signage	18		
Does not notice/know	6		It's not over-signed
Positive comments about the signage	10		Recently signage has been changed so it's good.
Improvement of the signage in general	5		Unless you know where you are going its pretty poor
Better signage for businesses	2		No one can find the Travelodge due to the lack of signage

3.6.2 Providing advice about the maximum size of vehicle

As illustrated by Table 3.31, the majority of businesses (86%) said that they do not advise those making deliveries or collections about the maximum size of vehicle that can access their site. 1 business that responded positively to this question indicated that the Head Office provides advice on vehicle size for those making deliveries or collections.

Table 3.31: Advice about the maximum size vehicle that can access the businesses' sites

Response	Number of businesses	%
Yes	9	13.6%
No	57	86.4%
Total	66	100.0%

3.6.3 Provision of map of the area

As shown by Table 3.32, the majority of businesses (88%) don't provide suppliers and operators with a map or relevant details about the loading and unloading restrictions in the area. 1 business said that it doesn't provide suppliers and operators with maps but specified that a map is displayed on the web site. 1 business said that the Head Office provides the operators with maps, while 2 businesses said they occasionally provide those making deliveries and operators with a map of the area.

Table 3.32: Providing map with the business' location and details of relevant loading and unloading restrictions

Answer	Number of businesses	%	Comments
Yes	1	0.2%	Head Office provides the maps and directions
Yes	2	0.4%	Advice occasionally
Yes	5	12.1%	
No	57	87.9%	
No	1	0.01%	Map is provided on the web site
Total	66	100.0%	

3.7 Opinions and wider freight policies

3.7.1 Views about freight movements in the Tolworth area

Businesses were asked to give their general view of current efficiency, safety and sustainability of freight movements in the Tolworth Broadway area. As shown by Table 3.33, 37% of businesses said they do not have problems. 8 (12%) businesses said the area is congested due to traffic levels, delivery vehicles or due to accidents occurring on the A3. 5 (8%) businesses are concerned with the Health and Safety risks that might arise from improper signage, insufficient lighting, size of delivery vehicles, etc. 6 (9%) businesses said that there is not sufficient parking spaces for customers or would want more parking spaces to be provided. 5 (8%) businesses said they would want more loading and unloading facilities to be provided. 3 (5%)

businesses said they have access issues related to deliveries such as road access being blocked.

Table 3.33: General view about the efficiency, safety, sustainability of freight movements in Tolworth area

Respondents	No.	Quotes
Congestion on the routes due to levels of traffic and the number of vehicles making deliveries or accidents	8	It's very busy; always lorries & vans parked on High Street. Parking is not brilliant
Health and Safety risks	5	Could be safety issue with deliveries to Iceland parked on the pavement
Noise, Vibrations, Pollution,	1	Lots of trucks going past, noise, vibrations through shop window
Restrictions leading to PCN's being issued	2	Day deliveries (9-5) nowhere to park to deliver - ticketed
Poor at junctions and roundabouts, and other specific areas	1	A little poor. At roundabout jctn Ewell Road & Warren Drive - there are problems at this junction
Loss of Car Parking Facilities in Recent Time and Other parking issues	2	Access road at back is of no use, due to shared space. Loss of car parking in recent years has been a big drawback - nightmare
Lack of Alternative Routes for Delivery Vehicles if Congested	1	Average - A3 gets busy, no alternative routes for their drivers to use that are suitable for their vehicles
Access issues for deliveries	3	Access can be a bit of a problem at the back - deliveries to other shops can block the road. Pay into a fund to clean up the area at the back
Improved recently	2	Better now, had problems a few years ago - dumped cars etc, now sorted (Councillor lives upstairs and helps)
Concerned about parking for customers and provision of more parking facilities	6	Busy route - more concern about customer parking, rather than freight issues
More loading facilities/bays are needed	5	No parking bays for deliveries. Better facilities needed for deliveries
Concerns about certain areas with regards to illegal parking and fly- tipping	2	Tolworth Close needs environmental improvements. Stop people parking illegally. Activities going on, such as loading of rubbish, are not permitted but happen
Uneven Road Surfaces	3	Safety - lighting in alleyway behind premises not bright enough. Road surface not being maintained behind premises
Signage Improvements Needed	1	The access roads at back need to be cleaned up, proper signage, make surface even. Many tenants don't keep the area clean, dump rubbish etc. Bad drainage, also fats being dumped in drains at back
Conflict between traffic, public transport and pedestrians	1	Needs a loading bay for deliveries. Not safe due to location of bus stop & pedestrian crossings and lorries parked.

Respondents	No.	Quotes
Improvement of communication between Council and businesses necessary	1	Could be made a lot easier with improved communication from business to council, council to business
Improvements needed in general	3	Things could be better.
Fine - No problems	24	Works for us!
N/A to BUSINESS	6	
Comments Not Applicable	1	

3.7.2 Delivery and Servicing Plans

As shown by Table 3.34, 89% of businesses said they did not have a Delivery and Servicing Plan. 5% of businesses said that they did have a Delivery and Servicing Plan, with references made to environmental commitments and plans (1 of these businesses stated that it uses couriers which are more efficient in terms of CO₂ emissions and use less packaging). 4 businesses thought it was possible that they had a Delivery and Servicing Plan, but referred to Head Office holding specific details.

Table 3.34: Delivery and Servicing Plan

Answer	Number of businesses	%	Comments Made
Yes	3	4.6%	Part of Environmental Commitments/Plans
No	58	89.2%	
Possible	4	6.2%	Referred to Head Office
Total	65	98.5%	
Missing	1	1.5%	
Total	66	100.0%	

3.8 Summary

Survey sample

- 22 telephone interviews were carried out and 44 face-to-face interviews were completed. Most businesses were in the retail (19 businesses) and servicing (19 businesses) categories
- the majority of businesses open for trading at a time between 08:00 and 10:00 and close at a time between 15:00 and 19:00, while very few close after 21:00
- the majority of businesses (79%) have occupied their premises for 4 years or more. 9% of businesses have occupied their premises between 1 and 2 years and 11% of businesses have occupied their premises for between 2 and 4 years
- The majority of businesses in the area are small businesses with between 0 and 9 employees. (73% for full time employees 83% for part time employees).

Delivery and collection activities

- the majority of businesses (41%) receive between 1 and 3 deliveries a day. 21% have between 1 and 3 daily collections

- most businesses (32%) receive between 1 and 5 deliveries in a week. Most businesses (25%) have between 1 and 5 weekly collections, with 20% having between 6 and 10 weekly collections
- Monday is the day when most of the businesses (41%) receive their deliveries, followed by Tuesday (36% of businesses), and Friday (35% of businesses). Fridays and Saturdays are the busiest days for collections (50% of respondents in each case).
- The majority of businesses receive most deliveries and have most collections made between 10:00 and 16:00. Very few businesses have deliveries and collections before 07.00 and no businesses have deliveries after 19.00
- Nearly all deliveries and collections take less than 20 minutes to complete with the majority of the businesses indicating deliveries (48%) and collections (42%) take less than 10 minutes to complete

Method and type of delivery

- 39% of businesses use their own vehicles for deliveries and collections and the most commonly used vehicles are vans
- over 60% of these businesses use their own vehicle for more than half of their deliveries and collections
- the most commonly used types of vehicles are vans for both deliveries (69%) and for collections (74%). For deliveries, the second most commonly used vehicles are Rigid Good vehicles (33% of businesses indicated this). The majority of businesses have goods delivered and collected in loose cartons and on pallets.
- the majority of deliveries were for drinks (23 responses), food (21 responses) and stationery and office equipment (17 responses).
- the majority of businesses (78%) are not responsible for organising their own transport for deliveries. For the majority of these businesses (79%), the supplier is responsible for deliveries and for half of the businesses the Head Office is responsible for collections

Loading Facilities

- the majority of businesses do have off-street facilities for deliveries (69%) and collections (65%). The majority of these businesses have just one space available
- Those businesses with off-street facilities for deliveries and collections were asked to indicate the main issues associated with the use of the off-street loading and unloading facilities. The main issues were associated with the uneven surface of the roads, access issues (such as congestion at delivery times), parking problems (such as illegal parking and spaces being blocked by non-tenants) and other problems such as fly-tipping, waste and rubbish left uncollected
- for the majority of the businesses (47%), vehicles undertaking loading and unloading activities stop and park directly in front of their premises. 38% use the service area at the back of the premises, 14% stop up 20 metres away from the business premises and 14% have to park more than 20 metres away from the front of the premises
- The majority of the businesses (37%) said that loading and unloading activities are not allowed at all in front of the premises

- the majority of businesses (59%) are not affected at all by the enforcement of loading and unloading restrictions. 15% of businesses are affected 'negatively a lot' and 15% are affected 'negatively a little' by the enforcement of loading and unloading restrictions. Comments made by businesses include that, due to parking restrictions, delivery drivers use the bus-stop and some suppliers won't deliver to their premises. The provision of more loading bays was requested. Other businesses indicated that, due to the nature of their business, they are not affected directly by the loading restrictions.

Information availability

- the majority of businesses (39%) said that signage in Tolworth Area was "Fair". 26% of businesses said that signage was "Good". However, 18% of businesses described it as "Poor"
- 12 businesses said that they would like improvement of the signage at a local level or for specific areas (specifically just before the A3 exit, on the exit from the M&S car park, Tolworth Broadway and Ewell Road), while 5 businesses said they would like signage improvements in general. A further 2 businesses wanted better signage for businesses, as drivers currently have to stop and ask for directions.
- the majority of businesses (86%) said that they don't advise those making deliveries or collections about the maximum size of vehicle that can access their site
- the majority of businesses (88%) don't provide suppliers and operators with a map and relevant details about local loading and unloading restrictions.
- Businesses were asked to give their general view of current efficiency, safety and sustainability of freight movements in the Tolworth Broadway area. 37% of businesses said they do not have problems. 8 (12%) businesses said the area is congested due to traffic levels, delivery vehicles or due to accidents occurred on the A3
- 89% of businesses said they don't have a Delivery and Servicing Plan

4 OBSERVATION STUDY

In developing the recommendations for this report, we also referred to the initial observation study carried out in June 2008. Two site visits were carried out; on 24 and 25 June, 2008, to observe the current nature of delivery and servicing activity within the study area, the extent of kerbside deliveries and obvious visible existing problems impacting and resulting from delivery and servicing activity.

The initial observation study provided a snapshot of delivery movements in the Tolworth area as shown below. Observational study findings concerned issues regarding:

- The observations indicated that delivery drivers do not use the designated delivery bays (for example the one in the middle of Tolworth Broadway, on the west side). Delivery drivers will more commonly pull up next to the kerb outside the shop they are delivering to (this point has been reinforced in the detailed business surveys)
- During the observations, there were very few deliveries made to the rear of the stores. Rear access to the shops is of poor quality, with a high incidence of fly tipping, poor road quality and uncontrolled parking.
- During the observations, the area at the base of Tolworth Tower was identified as an issue for deliveries. Deliveries to M&S in particular, have a knock-on effect and cause conflict with other road users, including car drivers accessing the multi-storey car park, other deliveries to the rear of the building and buses.

The main recommendations of the initial observation study included:

- Consideration could be given to introducing multiple loading bays at the front of stores, rather than at the end of the streets.
- Consideration could be given to improving the quality of the rear access roads by upgrading the road surfaces, controlling fly tipping and encouraging retailers to make better use of the rear access roads.
- Better use of side roads for deliveries (which run perpendicular to Tolworth Broadway) could also be considered.
- Further work to determine how the Tolworth Tower delivery area could be improved to make it safer and to enable more efficient deliveries.

5 RECOMMENDATIONS

The analysis of findings shows that there is potential for improving a variety of aspects of freight movement within the Tolworth area. The recommendations provided below 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 Tolworth Broadway observation study, which was conducted in June 2008. The recommendations are divided into the following categories;

- General Coordination;
- Delivery Patterns;
- Loading and unloading facilities,
- Improving information
- Increasing usage of off-street delivery areas.

General Coordination

- **Development of a Tolworth Business Forum freight sub-group (mini-Freight Quality Partnership).** This group would provide a platform for various parties with an interest in local delivery and servicing activity to come together to discuss issues and find local solutions to local problems. This would also provide a platform for better communication between the Council and local businesses, which was one of the suggestions made in the business interviews. This group could report in to the Elected Member/Officer Working Group for Tolworth and membership of the group could be promoted through the Tolworth newsletter. Recognising that freight transport is a key issue and fundamental to the vitality of the Tolworth Broadway area, the aim of this group should be to maximise the efficiency and safety of local freight transport, while minimising its environmental impacts.
- **Development of an area-wide Delivery and Servicing Plan for the Tolworth area.** This could be developed in conjunction with the Tolworth Business Forum freight sub-group. 89% of businesses surveyed said they did not have a Delivery and Servicing Plan 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.
- **Development of an area-wide Travel Plan for Tolworth.** From the survey responses, it is clear that there is an issue with uncontrolled parking in the delivery areas to the rear of the retailers, along Tolworth Broadway. Businesses in the Tolworth Business Forum could be invited to join an area-wide Travel Plan Network for Tolworth which would encourage more commuters to use alternatives to the car.

Delivery Patterns

- **Rationalisation of Vehicle Movements:** The majority of delivery and collection activity is undertaken by vans. The majority of businesses (41%) receive between

1 and 3 deliveries a day and 21% have between 1 and 3 daily collections. Most dwell times for deliveries and collections are less than ten minutes, indicating small consignments being delivered to/collected from premises on a regular basis. To reduce the volume of freight traffic locally, there may be an opportunity to rationalise vehicle movements. These initiatives could include combining 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. This type of rationalisation activity could be promoted by the Business Forum freight sub-group.

- **“Out of Hours” Deliveries:** The majority of delivery and collection activity within the study area is undertaken between 10:00 and 16:00, during the daytime. Reducing goods vehicle movement during this time 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. Therefore increasing the use of “out of hours” deliveries could potentially help to improve the efficiency of local freight movement, while helping to reduce the environmental impact. It is recommended that the assessment of the feasibility of undertaking increased “out of hours” deliveries is carried out, under the guidance of the Tolworth Business Forum freight sub-group.

Loading and unloading facilities

- **Improving the provision of loading and unloading bays** on The Broadway, Ewell Street and Tolworth Broadway. This was a specific request from businesses and has the potential to reduce congestion, improve traffic-flow, reduce the necessary time required for delivery/collection activity (at least in terms of drivers seeking suitable location to park up) and would help to reduce instances of illegal loading/unloading. This would help to reduce the traffic issues that arise from road access being blocked by goods vehicles undertaking loading and unloading activities. Additional dedicated loading and unloading facilities have the potential to minimise and prevent Health and Safety issues that arise from the conflict between pedestrians and freight vehicles undertaking loading and unloading activities and drivers having to move handling units significant distances along pavements.

Improving Information

- **Review of signage for/in Tolworth area and development of a signage plan for the Tolworth area.** Improvement of signage at a local level, in areas such as Tolworth Broadway, Ewell Road, Warren Drive. Improvement of signage indicating specific areas such as Tolworth Broadway, Tolworth before the A3 exit. Improvement of signage indicating local businesses such as Travelodge. These improvements could help to reduce instances of lost mileage while drivers attempt to find their delivery destinations or are required to stop to ask directions.

- **Improved driver information – maps** - The business surveys showed that the majority of businesses (88%) don't provide suppliers or operators with a map and relevant details about the loading and unloading restrictions in the area. A map for delivery drivers in the Tolworth area could be developed showing the Tolworth area and the location of key local businesses (bearing in mind many have been present for approximately 4 years, showing a fairly stable local presence). Importantly, the location of both delivery bays and loading/unloading restrictions would be marked. This improved driver information would also help to support the improvements to road signage. It would also be an ideal promotional tool to help raise awareness of the changes to the local street scene following scheme development and implementation.

Increase usage of off-street delivery areas

- **Adoption of private road** - The access road running behind Tolworth Broadway (Broadoaks) is a private road. Survey respondents identified problems with fly-tipping, blocked drains and uncontrolled parking along this road. It is recommended that this road is adopted by RBK, so that there could be more control over these issues and the access road could be used for deliveries to the rear of the retail premises along Tolworth Broadway. In the meantime, the current programme to clean the access road, which is operated by the RBK Neighbourhood Manager, should be continued.
- **Introduce off-peak servicing bay on Princes Avenue** – There is an issue with lorries parking in bus-stops within the study area to carry out loading/unloading activity. To off-set this, it is recommended that an off-peak servicing bay is introduced in the bus lay-by in Princes Avenue.
- **Prevention of fly tipping** - Those businesses with off-street facilities for deliveries and collections were asked to indicate the main issues associated with these facilities. Fly-tipping on Tolworth Close was one of the issues identified. In order to encourage businesses to use the off-street delivery and servicing facilities, fly tipping could be discouraged through better enforcement using CCTV and better signage. In addition, leaflets and advertisements could be used to illustrate the problems generated by fly-tipping and the penalties for offenders.

Annex A

Introductory Letter

Royal Borough of Kingston-upon-Thames

Address

Date

Business Name
Address

Subject: Research of Freight Movements in Tolworth Broadway

Dear Sir/Madam,

We are writing to inform you of a forthcoming survey which will take place in Tolworth Broadway.

The survey is designed to help us gain a better understanding of freight movements in terms of delivery/collection and servicing relating to retail and other business premises in Tolworth Broadway and to develop a set of recommendations to help improve the safety, efficiency and sustainability of local freight transport.

The independent transport consultants, Transport & Travel Research Ltd (TTR), have been commissioned to undertake the survey on behalf of the Royal Borough of Kingston-upon-Thames.

During January 2009, TTR will conduct face-to-face and telephone interviews with retail premises and other businesses within the area, during appointments which will last approximately 20 minutes.

Please be advised that TTR will be contacting you shortly by telephone to arrange a suitable appointment time to conduct the survey.

Your views on delivery/collection and servicing activity in this key commercial area are extremely important to us and we sincerely hope that, when contacted, you will be able to offer your assistance to this survey.

If you have any questions or require further information about the survey, please contact Sarah Clifford at TTR on 0207 340 4526, who will be happy to assist.

Yours faithfully

Annex B

Questionnaire

Tolworth Freight Movement Study
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Location			
Time		Date	
Name of Business		Business Telephone Number	
Type of Business		Business Email	
Address		Business Web Address	

Interviewee Name	
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Good morning/afternoon. I am from TTR and we are conducting the interviews on behalf of Kingston upon Thames to find out what the business' requirements, perceptions and experience are of freight movements in Tolworth Broadway. 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.

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

Was the manager/staff member willing to take part in an interview?					
Yes now	<input type="checkbox"/> 1	Yes later	<input type="checkbox"/> 2	No	<input type="checkbox"/> 3

	Please give details of why the interview was refused.

Q1	Please can you tell me your business hours?				
		First opening	Last closing	Interim closing	Interim opening
	Monday				
	Tuesday				
	Wednesday				
	Thursday				
	Friday				
	Saturday				
	Sunday				

Q2a	Approximately, how many delivery and collection activities do you have on an average day?	
	Number of <u>deliveries</u> in a typical day	
	Number of <u>collections</u> in a typical day	

Q2b	Approximately how many deliveries and collections do you have in a typical week?
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Number of <u>deliveries</u> in a typical week	
Number of <u>collections</u> in a typical week	

Q3	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		

Q4	During which period 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

Q5	On average, how long does a delivery and collection take? (NB: this is the time taken from when the delivery vehicle arrives outside to when the vehicle departs)			
	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		
	Notes (if required)			

Q6	Do you carry out your own collections and deliveries using your own vehicles?		
	Yes, please specify type and number of vehicles and go to Q7		
	Van	<input type="checkbox"/> 1	Number:
	Rigid goods vehicle	<input type="checkbox"/> 2	Number:
	Articulated goods vehicle	<input type="checkbox"/> 3	Number:
	Other	<input type="checkbox"/> 4	Number:
	No	<input type="checkbox"/> 5	Go to Q8

Q7	What percentage of all deliveries and collections do you carry out yourself using your own vehicles?

Q8	Can you tell me what types of vehicles deliver to and collect from your premises and the most commonly used?		
	Delivery		
	Vehicle type	Vehicle types used (Tick all that apply)	Most commonly used vehicle (Tick one only)
	Van	<input type="checkbox"/> 1	<input type="checkbox"/>
	Rigid goods vehicle	<input type="checkbox"/> 2	<input type="checkbox"/>
	Articulated goods vehicle	<input type="checkbox"/> 3	<input type="checkbox"/>
	Other	<input type="checkbox"/> 4	<input type="checkbox"/>
	Collection		
	Vehicle type	Vehicle types used (Tick all that apply)	Most commonly used vehicle (Tick one only)
	Van	<input type="checkbox"/> 1	<input type="checkbox"/>
	Rigid goods vehicle	<input type="checkbox"/> 2	<input type="checkbox"/>
	Articulated goods vehicle	<input type="checkbox"/> 3	<input type="checkbox"/>
	Other	<input type="checkbox"/> 4	<input type="checkbox"/>

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

Q10	Can you tell me the type or variety of goods delivered to and collected from your business? (eg: white goods, food, drink, DVDs, clothes etc)

Q11	Are you responsible for <u>organising your own</u> transport for delivery and collection?		
	Delivery		
	Yes	<input type="checkbox"/> 1	
	No	<input type="checkbox"/> 2	<i>If no, please specify who is responsible</i>
	Collection		
	Yes	<input type="checkbox"/> 1	
	No	<input type="checkbox"/> 2	<i>If no, please specify who is responsible</i>

Q12	Do your premises have off street loading and unloading facilities for deliveries and collection of goods?				
	Delivery				
	Yes	<input type="checkbox"/> 1	<i>No. of spaces</i>	No	<input type="checkbox"/> 2
	Collection				
	Yes	<input type="checkbox"/> 1	<i>No. of spaces</i>	No	<input type="checkbox"/> 2

If No, go to Q14

Q13	<i>Do you have any issues relating to the use of your off street loading and unloading facilities, i.e. access, illegal parking, uneven surface, etc?</i>
	Please give an explanation

Q14	<i>If you don't have off street loading and unloading facilities how are deliveries to and collections from your premises carried out? (for example, across the kerb, wheeled along the pavement etc)</i>
	Please give an explanation

	Where do the majority of goods vehicles delivering to and collecting from your premises park or stop?	
	Directly in front of the premises	<input type="checkbox"/> 1
	<i>Not directly outside but within 20 metres of the premises</i>	<input type="checkbox"/> 2
	<i>More than 20 metres from the front of the shop</i>	<input type="checkbox"/> 3
	<i>Service area at the back of the premises</i>	<input type="checkbox"/> 4
	<i>Service road at the front of the premises</i>	<input type="checkbox"/> 5
	<i>Side Road</i>	<input type="checkbox"/> 6
	<i>Not applicable</i>	<input type="checkbox"/> 7
	<i>Other (please specify)</i>	<input type="checkbox"/> 8

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Q16	Do current restrictions allow legal loading to take place from the road directly outside these premises?			
	All day	<input type="checkbox"/> 1	Don't know*	<input type="checkbox"/> 4
	Part of the day	<input type="checkbox"/> 2	Not applicable	<input type="checkbox"/> 5
	No loading at all	<input type="checkbox"/> 3		

* Note to surveyors: If answer is 'don't know', please check the delivery restrictions directly outside the premises and describe in this box

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Q17	To what extent do current loading restrictions and their enforcement affect <u>deliveries to your business</u>?			
	Negatively a lot	<input type="checkbox"/> 1	Positively a little	<input type="checkbox"/> 4
	Negatively a little	<input type="checkbox"/> 2	Not at all	<input type="checkbox"/> 5
	Positively a lot	<input type="checkbox"/> 3	Not applicable	<input type="checkbox"/> 6
	Notes (if required)			

Q18	How would you describe the signage to the Tolworth area 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					

Q19	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

Q20	Do you provide suppliers and operators with a map of the area indicating the location of your premises and details of relevant loading and unloading restrictions?	
	Yes	<input type="checkbox"/> 1
	No	<input type="checkbox"/> 2

Q21	What is your general view of current efficiency, safety and sustainability of freight movements in Tolworth Broadway?		
	Please give an explanation		

Q22	Does your business have a Delivery and Servicing Plan? (Explain the concept of DSPs)		
	Yes	<input type="checkbox"/> 1	Please provide details (explain the plan)
	No	<input type="checkbox"/> 2	

Q23	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

Q24	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.

Annex C
Responses to questionnaire
surveys by street

Responses to questionnaire surveys by street

The Broadway

Completed surveys 29		Surveys started but not completed 0		Declined survey 4		Called twice - unobtainable 9	
Business name	1st line of address	Business name	1st line of address	Business name	1st line of address	Business name	1st line of address
Pound value	108 The Broadway			Spot Blue	Link House 140 The Broadway	The Jaipur	90 The Broadway
State express cleaners	108 The Broadway			ABP	Link House 140 The Broadway	General Dietary	Link House 140 The Broadway
William hill organisation	6 The Broadway			Beds Express	20 The Broadway	Pineapp	Link House 140 The Broadway
Munchy hut	132 Broadway			Sports For Schools	Link House 140 The Broadway	Frontline Focus	Link House 140 The Broadway
Cafe delight	410 The Broadway					Sao Sian Thai Restaurant	120 The Broadway
Lloyds pharmacy	11 The Broadway					Abbey National	96 The Broadway
Tolworth Broadway post office	64 The Broadway					Digi Broadcast	Link House 140 The Broadway
Stonecote homes	140 The Broadway					Ladbroke	408 The Broadway
Marks & spencer	67-73 The Broadway tolworth tower					Sports for Schools	Link House 140 The Broadway
J barrie	128 The Broadway						
7 stars	76 The Broadway						
Broadway bar cafe	43-51 The Broadway						
Nationwide building society	29 The Broadway						
Iceland	26-34 The Broadway						
Premier cleaners	400 The Broadway						
Best food extra	68-72 The Broadway						
Hamilton windows	4 The Broadway						
Vaishna superfoods	396 The Broadway						
Liddiards coffee bar	114 The Broadway						
Pizza on Broadway	116 The Broadway						
Barclays bank	18 The Broadway						
Dream doors	406 The Broadway						
Fjd autos	134 The Broadway						
J h lorimer	31 The Broadway						
Pc rescue squad	17 The Broadway						
Radio jackie	110 The Broadway						
Fireplaces ltd.	102 The Broadway						
Burns & mason	102 The Broadway						
Tolworth news	104 The Broadway						
Dominos pizza	126 The Broadway						

Ewell Road

Completed surveys 13		Surveys started but not completed 1		Declined survey 3		Called twice - unobtainable 4	
Business name	1st line of address	Business name	1st line of address	Business name	1st line of address	Business name	1st line of address
J k sullivan's	466 Ewell Road	RC Church	401-403 Ewell Rd	Korea Captain, Co. Ltd	Ewell Road	Close Marine Finance	Ewell Road
Trios	430 Ewell Road			Detodo Collectables	450 Ewell Road	Surrey Windows & Conservatories	432 Ewell Road
Saxon car service	458 Ewell Road			All Areas Security Ltd	438 Ewell Road	Choi's Wok	440 Ewell Road
Hudson associates	460 Ewell Road					Abbeyifa	452 Ewell Road
Mary rigal chiropodist	412a Ewell Road						
The fircroft trust positive for mind & body	426-428 Ewell Road						
Zaman tailoring	448 Ewell Road						
Chivers easton brown	381 Ewell Road						
Williams electronic design ltd	423a Ewell Road						
Lloyds	402 - 404 Ewell rd, tolworth						
Acorn hospitality systems	446 Ewell Road						
Waterman associates	462 Ewell Road						
Surrey flower service	414 Ewell Road						

Tolworth Close

Completed surveys 5		Surveys started but not completed 0		Declined survey 2		Called twice - unobtainable 5	
Business name	1st line of address	Business name	1st line of address	Business name	1st line of address	Business name	1st line of address
Cag electrical	1 chancery house, tolworth close			Scott Wilson	Kingsley House	Esher Construction/The Centaur Shop	Tolworth Close
Lanmor consulting	34 tolworth close, thorogood house			Brayshaw Morley	2 Chancery House	Imperial Cancer Research	Unit 2 Chancery House
Murray denham	34 tolworth close, thorogood house					MGK Design	Canbury House
The first root uk ltd	Thorogood house, tolworth close					IT Architecture Computer Solutions	Unit 4, Chancery House
Charles king interiors	Thorogood house, tolworth close					Tree Frog Design Associates	Unit 6, Chancery House

Tolworth Tower

Completed surveys 3		Surveys started but not completed 0		Declined survey 1		Called twice - unobtainable 1	
Business name	1st line of address	Business name	1st line of address	Business name	1st line of address	Business name	1st line of address
Business winning systems	Level 5 tolworth tower			Cortes	Tolworth Tower	Superclubs	Tolworth Tower
Travelodge	Tolworth tower						
Stevens investments ltd (owner / landlord of tt)	Tolworth tower						

Burwood Close

Completed surveys 1		Surveys started but not completed 0		Declined survey 0		Called twice - unobtainable 0	
Business name	1st line of address	Business name	1st line of address	Business name	1st line of address	Business name	1st line of address
Hamilton glass products ltd	Burwood Close						

Tolworth Broadway

Completed surveys 15		Surveys started but not completed 1		Declined survey 11		Called twice - unobtainable 15	
Business name	1st line of address	Business name	1st line of address	Business name	1st line of address	Business name	1st line of address
Anthony opticians	84 Tolworth Broadway	30 Minute Photos	33 Tolworth Broadway	Sunshine cafe	60 Tolworth Broadway	Nails City	56 Tolworth Broadway
Britannia buliding society	16 Tolworth Broadway			Rahma's Shoe Shop & Barbers	88 Tolworth Broadway	Kebab Express	5 Tolworth Broadway
Ganesh greengrocers	82 Tolworth Broadway			Anglican Home Improvements	78-80 Tolworth Broadway	Shahji's	7 Tolworth Broadway
Boots	59 Tolworth Broadway			Garriers Funeral Services	55 Tolworth Broadway	Cut Masters	86 Tolworth Broadway
National schoolwear centre	55-57 Tolworth Broadway			Code the Salon	41A Tolworth Broadway	Jenny's Nail & Hair Design	9 Tolworth Broadway
Subway	98 Tolworth Broadway			Blockbusters	124 Tolworth Broadway	Bellisima	92 Tolworth Broadway
Pizza to go	21 Tolworth Broadway			Surrey Comet	130 Tolworth Broadway	Leach & Co.	Ashley House, Tolworth Broadway
Tolworth community library	37-39 Tolworth Broadway			Herbal One	15 Tolworth Broadway	Eurolux International Ltd	Eurolux House, 456 Tolworth Broadway
The co-operative travel	52 Tolworth Broadway			Tasty Fried Chicken	19 Tolworth Broadway	Tesco Store Ltd	Tolworth Broadway
Refresh books	23 Tolworth Broadway			Planet Pizza	35 Tolworth Broadway	Office Network Systems	106A Tolworth Broadway
New look on broadway bathrooms	3 Tolworth Broadway			Broadway Lodge	41 Tolworth Broadway	Scope	118 Tolworth Broadway
Hsbc	2 Tolworth Broadway					Better/Betting Shop	22 Tolworth Broadway
Broadway cafe	66 the broadway					Superfish	25 Tolworth Broadway
Tolworth evergreens	50 Tolworth Broadway					Chadwick & Co.	27 Tolworth Broadway
Fara	94 Tolworth Broadway					Vancha Char Nepalese Restaurant	41 Tolworth Broadway