



**REPORT
&
SUMMARY**
FEBRUARY 2007
TEST VALLEY
EMPLOYMENT NEEDS

CONTENTS

1	Background
2	Sample
3	Timing & Response
4	Summary of Responses:
	A. Factors Influencing Location
	B. Tenure/Size of premises
	C. Ratings for Premises and Locality
	D. Future Requirements for Premises
	E. Prospects for future business/employment
	F. Staff Training
	Appendix I Tables
	Appendix ii Charts

1. Background

The Hill Taylor Partnership was commissioned by Test Valley Borough Council to carry out 300 telephone interviews with businesses within the Romsey & Southern Test Valley areas on the subject of Training Needs.

2. Sample

A random sample of relevant businesses to be used for the study, together with telephone numbers, was drawn from commercially available sources.

3. Timing & Response

The interviews were conducted over a period of 4 working days, commencing **February 13th 2007** and completing **February 16th 2007**.

Interviews typically took between seven and ten minutes to complete, with a refusal rate of 25%.

4. Summary of responses

A. Factors Influencing Location

The majority of businesses surveyed were well established in the area, with 94% having been established for over 5 years (**Q1, Chart C1**).

40% of those interviewed had moved premises at some stage, with the remaining 60% continuing to operate from their original premises (**Q2, Chart C2**).

Q3v, Chart C3 shows that the vast majority of those who had changed location had done so within the County of Hampshire, with approximately half of those who had changed location originating in the Southampton Area.

A relatively small number of those who had changed location (c.8%) originated in a location outside the county, with the majority of these originating within the south east of England (London/Reading etc).

Taking the sample as a whole, approximately 75% of businesses surveyed originated in the local area.

6% of businesses surveyed started in The local area with the past 5 years, and 4% of businesses had moved into the local area within the past 5 years from elsewhere

Those businesses who had moved location were asked what where the key factors determining the choice of location (**Q4a, Chart C4a**), and also asked to identify the single most important factor (**Q4b, Chart 4b**).

Availability and Appropriate Quality of premises were the most strongly represented factors, with Car Parking, Cost of Premises, Access to major and minor roads, Proximity to Customers and Flexibility to expand also appearing to be significant factors.

Other factors such as Labour availability, costs and skills, appeared to be much less significant in determining location choice.

Those businesses who had taken on new premises in the area within the past 5 years were asked what problems (if any) they encountered in finding suitable premises (**Q5BV, Chart 5Bv**). 60% reported that they encountered no problems with 23% reporting difficulties the choice or suitability of the premises available, and 9% reporting that the cost of commercial property had been a difficulty.

B. Tenure/Size of premises

85% of those surveyed were single-site operations (**Q6A, Chart 6a**), with 12% being one of a number of sites, and a further 3% being Head Office locations of multi-site operations.

Q6b, Chart 6b, details the tenure of the current site, with 14% **working from home**, 42% occupying **freehold** business property, and the balance (43%) being **leasehold**

Respondents were also asked the size of premises in terms of floor space (**Table Q7Av**). Answers were recorded in either square metres or square feet. The average size of premises for those answering in square feet was 16603 Sq Feet, but this encompassed a very broad range of sizes. For those answering in square metres the average size was 743 Sq metres.

The main activities carried out at the sites surveyed were **Office/Admin** (36%), **Sales** (35%), **Production/Manufacture** (32%), **Storage & Distribution** (15%) and **Laboratory/R&D** (3%)

C. Ratings of Premises and Locality

Respondents were asked to rate their current premises and location in terms of a variety of pertinent criteria, with responses recorded in tables **Q9a** through **Q12 (Charts C9a through C12)**

In summary, the majority considered their premises to be **Suitably Located** (46% Excellent/Very Good 59% Good/Satisfactory and 4% Poor/Disadvantaged)

Similarly 36% considered the **Quality of their Premises** to be Excellent/Very Good, 59% Good/Satisfactory and 5% Poor/Disadvantaged

73% considered their locality to be either an 'Excellent' or 'Very Good' **Place to work**, with only 2% considering it to be 'Poor' or 'Very Poor'.

In terms of the **Quality of Property available**, 41% thought that the quality of available property was '**Very Good**' or '**Excellent**' with 11% feeling that it was '**Poor**' or '**Very Poor**'. 48% recorded a rating of Satisfactory.

51% felt that the **Quality of Labour available** was '**Excellent**' or '**Very Good**', 43% felt that it was '**Satisfactory**', and 7% felt it was '**Poor**' or '**Very Poor**'

The **Cost of Commercial Property, Cost of Labour, Ease of Finding Suitable Premises, and Change in Cost of Premises** relative to other areas was also considered in this section, (**Q11abcd, Chart 11abcd**).

Generally speaking respondents felt that costs were either comparable or higher in their locality than in other areas, and a similar picture when it comes to ease of finding suitable premises i.e. Ease of finding premises was either comparable, or more difficult in their locality.

Finally respondents were asked to rate their locality '**Overall as a Place to do Business**'. 67% described their locality as an '**Excellent**' or '**Very Good**' place to do business. 29% felt their locality was a '**Satisfactory**' place to do business. 4% felt it was '**Poor**' or '**Very Poor**'

D. Future Requirements for Premises

Respondents were asked to predict their future requirements for space over the next 5 years, and also the next 6 to 10 years ((**Q14a/b, Chart 14a/b**), 27% of respondents foresaw an **increased requirement for space** within the next 5 years, 29% foresaw an increased requirement within 6-10 years. 22% of respondents felt it was '**Quite**' or '**Very Likely**' that they would consider **New Premises** within the next 5 years (**Q15a, Chart 15a**).

Those who foresaw the likelihood of new premises were also asked about their location preferences (**Q16, Chart 16**). 54% indicated a preference for the Southern Test Valley area (27% within the Romsey urban area, 12% outside the Romsey urban area, and 14% away from Romsey, but within Southern Test Valley).

33% indicated a preference elsewhere in Hampshire (28% in South Hampshire, 5% elsewhere in Hampshire). 12% indicated a preference for elsewhere in the UK

In terms of tenure (**Q17, Chart 17**), 53% expressed a preference for '**Freehold**' property, with 11% preferring '**Leasehold**'. 32% expressed '**No Preference**'.

52% foresaw a requirement for increased **Office Space**, 28% for **Warehousing or Storage**, 26% for **Factory/Production Space** and 18% for **Retail Space**. Other types of space totalled 7%. (**Q18, Chart 18**)

72% foresee a requirement for additional space (including 3% who require premises in addition to their existing premises, whereas only 7% foresee a requirement for less space than at present. The remainder would be seeking premises of a similar size to those currently occupied (**Q19, Chart 19**).

To complete the section on requirements for future premises, respondents were asked to identify potential inhibiting factors to relocating into their preferred area (**Q20, Chart 20**).

Chief amongst these, with 29% of mentions, was '**Lack of availability of premises**', but '**Commercial Property Costs**' (17%), **Lack of Appropriate Quality Premises** (11%) and '**Lack of Car Parking**' (8%) were also significant barriers.

E. Prospects for Future Business/Employment

The penultimate section of the survey dealt with future prospects for business, together with employment and skills issues.

57% of respondents expected business growth over the next 3 to 5 years, with a similar percentage anticipating growth in the longer term. 35% anticipate that business will remain the same over a 3 to 5 year period, whereas 8% foresee a decline. **(Q21a/b, Chart 21a/b)**

Over the next 12 months 28% of respondents anticipate growth in staffing levels, with less than 2% predicting a reduction **(Q22, Chart 22)**. 67% anticipate no change (with 4% Don't Know).

Respondents were then asked about difficulties experienced in recruiting staff. 23% of those interviewed said that they had experienced difficulty in recruitment **(Q23 Chart 23)**.

Those who had experienced difficulty were also asked about which kinds of appointment they had experienced difficulty with. The full list of responses is reported in **(Q24v Chart 24v)**, which shows that difficulties have been experienced across a broad range of Job types.

The principal reasons for difficulty were identified as '**Lack of Skills/Training in this area**' (38%) and '**General shortage of skilled staff**' (12%), with a variety of other reasons also being identified to a lesser degree **(Q25v Chart 25v)**.

The main actions taken or planned to help with recruitment were '**Advertising**' (28%) and '**Job Centre**' (10%). 29% said that no particular action had been taken or was planned. **(Q26v Chart 26v)**.

At **Q27, Chart 27** Respondents were asked if skill shortages were affecting their business, and 22% reported that this was the case (similar to the number that reported difficulties in recruitment). Again the skill shortages identified covered a wide range of activities, but '**Engineering /Fitting/Mechanics**' was the most strongly reported (26%), with '**General Skills/Experience**' being reported by 20% of respondents **(Q28av Chart 28av)**.

Q28b, Chart 28 examined the effect of skills shortages on businesses, and 83% foresaw detrimental effects in terms of either '**Short Term Loss of Potential Earnings**' or '**Short Term reduction in profitability**'.

20% expected a '**Curtailment of expansion plans**', and 9% foresaw the possibility to '**Cease Trading/Sell the Company**'. Only 11% reported that skill shortages were likely to have no real effect.

In **Q29v, Chart 29v** respondents were asked to identify any major concerns or problems that might affect the business over the coming 5 years. Although 68% of respondents reported no particular concerns, '**Recruitment of Suitably Qualified Staff**' was reported as being the largest concern (7%), along with '**Increases in Legislation**' (6%) and '**Business Rates, Council Taxes Rising**' (5%) and '**Compton/Cheap Imports** (5%).

F. Staff Training

The final section of the survey asked about training issues specifically.

When asked if their business would benefit from better access to publicly funded training 32% of all respondents said that this would be of benefit, **(Q30A Chart 30A)**, and 31% said that their business would benefit from more advice on the training opportunities available locally **(Q30B Chart 30B)**.

At **Q31v, Chart 31v** respondents were asked to identify areas where training was needed. Although many of the areas identified were Job-Specific (Hairdressing, Cabinet-Making etc.), there were also a number of more general areas identified.

These included **Business Management, Health & Safety, IT Skills** and **Engineering-related skills**.

Finally, respondents were asked if they felt there was adequate provision for training locally. 63% of respondents thought that there was inadequate training provision locally, with 15% feeling that local provision was sufficient. The remainder (22%) expressed no opinion **(Q32 Chart 32)**

Appendix I - Tables

Q1. How long ago was the business set up ? All respondents

Total	300	
Within the last 2 years (1.0)	4	1.33%
2 to 5 years (3.5)	15	5.00%
6 to 10 years (8.0)	53	17.67%
11 to 20 years (15.0)	110	36.67%
21 years or more (25.0)	118	39.33%
Mean score	16.94	

Q2. Did the business start on the current site/premises?

All respondents

Total	300	
Yes	181	60.33%
No	119	39.67%

Q3V. Where was your previous location ?

Did not start at current premises

Total	119	
Romsey	37	31.09%
Eastleigh	24	20.17%
Southampton	16	13.45%
Chandlers Ford	9	7.56%
Winchester	4	3.36%
Totton	3	2.52%
London	2	1.68%
Hedgend	2	1.68%
Millbrook	2	1.68%
Stockbridge	2	1.68%
Basingstoke	1	0.84%
Bishopstoke	1	0.84%
Botley	1	0.84%
Churnworth	1	0.84%
Nth Baddesley	1	0.84%
Milton Keynes	1	0.84%
Horton Heath	1	0.84%
Landford - Wiltshire	1	0.84%
Leckford	1	0.84%
Leicester	1	0.84%
Lockley	1	0.84%
Portswood	1	0.84%
Reading	1	0.84%
Ringwood	1	0.84%
Swanmore	1	0.84%
Fairoak	1	0.84%
Andover	1	0.84%
Houghton	1	0.84%
Kent	1	0.84%
Timsbury	1	0.84%
Whiteparish	1	0.84%

Q4A. What key factors attracted you to your current site/premises ?

Did not start at current premises

Total	119	
Availability of site/premises	50	42.02%
Appropriate Quality of premises	41	34.45%

Availability of car parking	18	15.13%
Commercial property costs	17	14.29%
Access to local roads	16	13.45%
Access to major roads	15	12.61%
Proximity to customers	14	11.76%
Flexibility to expand site in future	10	8.40%
Freehold / Purchase own property	7	5.88%
Labour availability	6	5.04%
Availability of public transport	6	5.04%
Size of premises	6	5.04%
Its their home	6	5.04%
Proximity to home	6	5.04%
Living Costs (i.e. housing etc.)	5	4.20%
Proximity to suppliers	5	4.20%
Quality/skills of workforce	2	1.68%
Proximity to Airport	2	1.68%
Labour Cost	1	0.84%
Proximity to Port	1	0.84%
Access to higher bandwidth for data transfers	1	0.84%
Flexibility of lease	1	0.84%
Proximity to Higher Education	0	0.00%
Don't know / Not around when move happened	3	2.52%

Q4B. Which was the most important factor that attracted you to your current site/premises ?

Did not start at current premises

Total	119	
Availability of site/premises	33	27.73%
Appropriate Quality of premises	22	18.49%
Commercial property costs	11	9.24%
Access to major roads	6	5.04%
Size of premises	6	5.04%
Its their home	6	5.04%
Freehold / Purchase own property	6	5.04%
Availability of car parking	4	3.36%
Proximity to home	4	3.36%
Flexibility to expand site in future	3	3.36%
Proximity to customers	3	2.52%
Access to local roads	2	1.68%
Availability of public transport	2	1.68%
Living Costs (i.e. housing etc.)	1	0.84%
Proximity to Airport	1	0.84%
Proximity to Higher Education	0	0.00%
Flexibility of lease	1	0.84%
Labour availability	0	0.00%
Quality/skills of workforce	0	0.00%
Labour Cost	0	0.00%
Proximity to suppliers	0	0.00%
Proximity to Port	0	0.00%
Access to higher bandwidth for data transfers	0	0.00%
Don't know	7	5.88%

Q4C. How long has the business been located at this site/premises?

Did not start at current premises

Total	119	0.00%
Within the last 2 years (1.0)	9	7.56%

2 to 5 years (3.5)	32	26.89%
6 to 10 years (8.0)	34	28.57%
11 to 20 years (15.0)	36	30.25%
21 years or more (25.0)	8	6.72%
Mean score	9.52	

**Q5A. So can I just clarify that your business is -
Business opened at these premises less than 6 years ago**

Total	56	
A New business set up within 5 years	18	32.14%
A Business moved within 5 years from OUTSIDE TEST VALLEY	13	23.21%
A Business moved within 5 years from WITHIN TEST VALLEY	25	44.64%

Q5BV. What problems (If any) did you encounter in finding a suitable site/premises in the area?

Business opened at these premises less than 6 years ago

Total	56	
No problems	34	60.71%
Not a lot of choice / lack of suitable properties	13	23.21%
Finding right price difficult / Too expensive	5	8.93%
Work from home	3	5.36%
Lack of freehold / build own sites	2	3.57%
Planning difficulties	1	1.79%
Low bridges in the area (trucks)	1	1.79%

Q6A. Is this site/premises?

All respondents

Total	300	
A sole location for the business	255	85.00%
One of several sites	36	12.00%
A Head Office for other UK sites	9	3.00%

Q6B. And is this site?

All respondents

Total	300	
Freehold	127	42.33%
Long Lease (25+ years)	41	13.67%
Short Lease (3 to 25 years)	72	24.00%
Short Lease (Less than 3 years)	17	5.67%
Your home - Work from home	43	14.33%

Q7AV. Approximately how much floor space do you have ? Sq Feet

600000 (600000.0)	1	0.67%
150000 (150000.0)	1	0.67%
120000 (120000.0)	1	0.67%
100000 (100000.0)	1	0.67%
50000 (50000.0)	1	0.67%

30000 (30000.0)	1	0.67%
29000 (29000.0)	1	0.67%
27000 (27000.0)	1	0.67%
22000 (22000.0)	1	0.67%
20000 (420000.0)	2	1.34%
18000 (18000.0)	2	1.34%
15000 (15000.0)	1	0.67%
12000 (12000.0)	1	0.67%
11000 (11000.0)	1	0.67%
10500 (10500.0)	1	0.67%
7000 (7000.0)	2	1.34%
6000 (6000.0)	3	2.01%
5500 (5500.0)	1	0.67%
5000 (5000.0)	3	2.01%
4800 (4800.0)	2	1.34%
4500 (4500.0)	1	0.67%
4000 (4000.0)	4	2.68%
3500 (3500.0)	1	0.67%
3000 (3000.0)	4	2.68%
2500 (2500.0)	6	4.03%
2150 (2150.0)	1	0.67%
2000 (2000.0)	11	7.38%
1900 (1900.0)	1	0.67%
1600 (1600.0)	1	0.67%
1500 (1500.0)	2	1.34%
1400 (1400.0)	1	0.67%
1300 (1300.0)	2	1.34%
1250 (1250.0)	2	1.34%
1200 (1200.0)	3	2.01%
1100 (1100.0)	1	0.67%
1000 (1000.0)	12	8.05%
900 (900.0)	2	1.34%
800 (800.0)	6	4.03%
750 (750.0)	4	2.68%
747 (747.0)	1	0.67%
600 (600.0)	6	4.03%
500 (500.0)	7	4.70%
450 (450.0)	3	2.01%
350 (350.0)	1	0.67%
300 (300.0)	3	2.01%
224 (224.0)	1	0.67%
200 (200.0)	2	1.34%
184 (184.0)	1	0.67%
120 (120.0)	3	2.01%
100 (100.0)	3	2.01%
96 (96.0)	1	0.67%
80 (80.0)	1	0.67%
70 (70.0)	1	0.67%
50 (50.0)	1	0.67%
40 (40.0)	1	0.67%
35 (35.0)	1	0.67%
30 (30.0)	1	0.67%
24 (24.0)	1	0.67%
20 (20.0)	2	1.34%
4 (4.0)	1	0.67%
Don't Know	11	7.38%
Mean score	16603.21	

Q7AV. Approximately how much floor space do you have ? Sq Metres

5000 (5000.0)	2	7.69%
2000 (2000.0)	1	3.85%
1320 (1320.0)	1	3.85%
300 (300.0)	3	11.54%
240 (240.0)	1	3.85%
200 (200.0)	2	7.69%
180 (180.0)	1	3.85%

100 (100.0)	2	7.69%
90 (90.0)	2	7.69%
50 (50.0)	2	7.69%
35 (35.0)	1	3.85%
30 (30.0)	1	3.85%
22 (22.0)	1	3.85%
5 (5.0)	1	3.85%
Don't Know	0	0.00%
Mean score	743.43	

Q8. Which of the following best describes your MAIN activity at this site/premises:-

All respondents

Total	300	
Production/Manufacture/Assembly	95	31.67%
Sales (Retail/Wholesale)	105	35.00%
Storage and/or Distribution	44	14.67%
Office/Admin	109	36.33%
Laboratory/R&D	8	2.67%

Q9A. How do you rate the quality of your site/premises LOCATION

All respondents

Total	300	
Excellent / Very Good	137	45.67%
Good /Satisfactory	152	50.67%
Poor / Disadvantaged	11	3.67%

Q9B. How do you rate the quality of the site/premises itself?

All respondents

Total	300	
Excellent / Very Good	109	36.33%
Good /Satisfactory	176	58.67%
Poor / Disadvantaged	15	5.00%

Q10A. On a scale of 1 to 5, where 1 is Very Poor and 5 is Excellent - How would you rate your locality as a business environment in terms of the following:- As a place to work

All respondents

Total	300	
1 - Very Poor (1.0)	1	0.33%
2 - Poor (2.0)	5	1.67%
3 - Satisfactory (3.0)	74	24.67%
4 - Very Good (4.0)	121	40.33%
5 - Excellent (5.0)	99	33.00%
Mean score	4.04	

Q10B. How would you rate your locality as a business environment in terms of - The Quality of property available

All respondents

Total	300	
1 - Very Poor (1.0)	4	1.33%
2 - Poor (2.0)	29	9.67%
3 - Satisfactory (3.0)	145	48.33%

4 - Very Good (4.0)	81	27.00%
5 - Excellent (5.0)	41	13.67%
Mean score	3.42	

Q10C. How would you rate your locality as a business environment in terms of - The Quality of Labour		
All respondents		
Total	300	
1 - Very Poor (1.0)	4	1.33%
2 - Poor (2.0)	17	5.67%
3 - Satisfactory (3.0)	128	42.67%
4 - Very Good (4.0)	104	34.67%
5 - Excellent (5.0)	47	15.67%
Mean score	3.58	

Q11A. How would you rate the cost of commercial property locally, would you say it was:-		
All respondents		
Total	300	
Very Expensive compared with other areas (1.0)	65	21.67%
Quite Expensive compared with other areas (2.0)	88	29.33%
About average compared to other areas (3.0)	140	46.67%
Quite inexpensive compared to other areas (4.0)	5	1.67%
Very inexpensive compared to other areas (5.0)	2	0.67%
Mean score	2.30	

Q11B. And how would you rate labour costs locally, would they be:-		
All respondents		
Total	300	
Very Expensive compared with other areas (1.0)	29	9.67%
Quite Expensive compared with other areas (2.0)	56	18.67%
About average compared to other areas (3.0)	208	69.33%
Quite inexpensive compared to other areas (4.0)	7	2.33%
Very inexpensive compared to other areas (5.0)	0	0.00%
Mean score	2.64	

Q11C. And how would you rate the ease of finding suitable premises in your area :-		
All respondents		
Total	300	
Very Scarce compared with other areas (1.0)	48	16.00%
Quite Scarce compared with other areas (2.0)	69	23.00%
About average compared to other areas (3.0)	152	50.67%

Quite easy to find compared to other areas (4.0)	23	7.67%
Very easy to find compared to other areas (5.0)	8	2.67%
Mean score	2.58	

Q11D. And how would you rate the increasing costs of premises in your area :-

All respondents

Total	300	
Large increase in premises costs compared with other areas (1.0)	45	15.00%
Some increase in premises costs compared with other areas (2.0)	69	23.00%
About the same compared to other areas (3.0)	184	61.33%
Some decrease in premises costs compared to other areas (4.0)	1	0.33%
Large decrease in premises costs compared to other areas (5.0)	1	0.33%
Mean score	2.48	

Q12. And how would you rate your locality overall as a place to do business?

All respondents

Total	300	
1 - Very Poor (1.0)	2	0.67%
2 - Poor (2.0)	9	3.00%
3 - Satisfactory (3.0)	87	29.00%
4 - Very Good (4.0)	148	49.33%
5 - Excellent (5.0)	54	18.00%
Mean score	3.81	

Q13A. Approximately how many people are CURRENTLY employed FULL TIME from this site/premises?

All respondents

Total	300	
850 (850.0)	1	0.33%
500 (500.0)	1	0.33%
180 (180.0)	1	0.33%

135 (135.0)	1	0.33%
100 (100.0)	1	0.33%
95 (95.0)	1	0.33%
75 (75.0)	1	0.33%
66 (66.0)	1	0.33%
65 (65.0)	1	0.33%
60 (60.0)	1	0.33%
51 (51.0)	1	0.33%
50 (50.0)	1	0.33%
45 (45.0)	1	0.33%
40 (40.0)	3	1.00%
37 (37.0)	1	0.33%
35 (35.0)	1	0.33%
32 (32.0)	1	0.33%
30 (30.0)	5	1.67%
29 (29.0)	1	0.33%
28 (28.0)	1	0.33%
27 (27.0)	1	0.33%
25 (25.0)	1	0.33%
24 (24.0)	1	0.33%
23 (23.0)	1	0.33%
21 (21.0)	1	0.33%
20 (20.0)	4	1.33%
19 (19.0)	1	0.33%
18 (18.0)	3	1.00%
17 (17.0)	1	0.33%
16 (16.0)	5	1.67%
15 (15.0)	9	3.00%
14 (14.0)	2	0.67%
13 (13.0)	1	0.33%
12 (12.0)	13	4.33%
11 (11.0)	5	1.67%
10 (10.0)	4	1.33%
9 (9.0)	3	1.00%
8 (8.0)	9	3.00%
7 (7.0)	9	3.00%
6 (6.0)	16	5.33%
5 (5.0)	21	7.00%
4 (4.0)	21	7.00%
3 (3.0)	25	8.33%
2 (2.0)	39	13.00%
1 (1.0)	78	26.00%
Mean score	13.93	

Q13B. And how many people are CURRENTLY employed PART TIME from this site/premises?

60 (60.0)	1	0.33%
40 (40.0)	1	0.33%
20 (20.0)	4	1.33%
12 (12.0)	1	0.33%
10 (10.0)	4	1.33%
8 (8.0)	2	0.67%
7 (7.0)	3	1.00%
6 (6.0)	3	1.00%

5 (5.0)	6	2.00%
4 (4.0)	11	3.67%
3 (3.0)	31	10.33%
2 (2.0)	36	12.00%
1 (1.0)	59	19.67%
0 (0.0)	138	46.00%
Mean score	1.95	

Total employees		
850 (850.0)	1	0.33%
502 (502.0)	1	0.33%
190 (190.0)	1	0.33%
137 (137.0)	1	0.33%
126 (126.0)	1	0.33%
100 (100.0)	3	1.00%
75 (75.0)	1	0.33%
68 (68.0)	1	0.33%
60 (60.0)	1	0.33%
59 (59.0)	1	0.33%
50 (50.0)	1	0.33%
47 (47.0)	1	0.33%
45 (45.0)	1	0.33%
43 (43.0)	1	0.33%
41 (41.0)	1	0.33%
40 (40.0)	2	0.67%
35 (35.0)	2	0.67%
34 (34.0)	2	0.67%
33 (33.0)	2	0.67%
30 (30.0)	1	0.33%
27 (27.0)	1	0.33%
26 (26.0)	1	0.33%
25 (25.0)	5	1.67%
23 (23.0)	3	1.00%
22 (22.0)	1	0.33%
21 (21.0)	2	0.67%
20 (20.0)	1	0.33%
19 (19.0)	4	1.33%
18 (18.0)	3	1.00%
17 (17.0)	4	1.33%
16 (16.0)	4	1.33%
15 (15.0)	8	2.67%
14 (14.0)	11	3.67%
12 (12.0)	9	3.00%
11 (11.0)	3	1.00%
10 (10.0)	8	2.67%
9 (9.0)	8	2.67%
8 (8.0)	10	3.33%
7 (7.0)	16	5.33%
6 (6.0)	17	5.67%
5 (5.0)	20	6.67%
4 (4.0)	27	9.00%
3 (3.0)	25	8.33%
2 (2.0)	36	12.00%
1 (1.0)	47	15.67%
Mean score	15.88	

Q14A. Thinking over the next 5 years, Would you envisage your requirement for space to:-

All respondents

Total	300	
Increase	81	27.00%
Decrease	16	5.33%
Stay the same	203	67.67%

Q14B. And over the longer term, 6 to 10 Years, would you envisage your requirement for space to:-**All respondents**

Total	300	
Increase	87	29.00%
Decrease	15	5.00%
Stay the same	198	66.00%

Q15A. How likely is it that you will consider other sites/premises in the next five years?**All respondents**

Total	300	
Very Likely (2.0)	32	10.67%
Quite Likely (1.0)	35	11.67%
Quite Unlikely (-1.0)	42	14.00%
Very Unlikely (-2.0)	178	59.33%
Don't Know	13	4.33%
Mean score	-1.04	

Q15B. And over the longer term, 6 to 10 Years, How likely is it that you will consider other sites/premises in the next five years?**All respondents**

Total	300	
Very Likely (2.0)	21	7.00%
Quite Likely (1.0)	37	12.33%
Quite Unlikely (-1.0)	42	14.00%
Very Unlikely (-2.0)	183	61.00%
Don't Know	17	5.67%
Mean score	-1.16	

Q16. Ideally, would you be looking for a site/premises :-**Likely to consider other sites / premises**

Total	74	
Romsey - within Urban Area (within town)	20	27.03%
Romsey - outside Urban Area (edge of town)	9	12.16%
Elsewhere in Southern Test Valley (away from Romsey)	11	14.86%
Elsewhere in South Hampshire sub-region (outside Southern Test Valley)	21	28.38%
Elsewhere in Hampshire (outside South Hampshire sub-region)	4	5.41%
Elsewhere in UK	9	12.16%

Q17. And would you prefer:-**Likely to consider other sites / premises**

Total	74	
Freehold	39	52.70%
Leasehold	11	14.86%
No preference	24	32.43%

Q18. What type of site / premises would you look for ?**Likely to consider other sites / premises**

Total	74	
Office	39	52.70%
Retail	13	17.57%
Warehouse / Storage	21	28.38%
Factory / Assembly	19	25.68%
Scientific / Hi-tech	2	2.70%
Guesthouse / Hotel	2	2.70%
A new house (working from home)	1	1.35%

Q19A. Would you be looking for alternative premises that are:-**Likely to consider other sites / premises**

Total	74	
Larger than present	51	68.92%
Smaller than present	5	6.76%
Same as present	16	21.62%
Or in ADDITION to your present premises	2	2.70%

Q19BV. Roughly how much floorspace do you think you would require at these premises ?**Likely to consider other sites / premises**

Total	74	
115 sq feet	1	1.35%
120 sq feet	1	1.35%
200 sq feet	1	1.35%
220 sq feet	1	1.35%
300 sq feet	1	1.35%
500 sq feet	2	2.70%
700 sq feet	1	1.35%
900 sq feet	1	1.35%
1000 sq feet	5	6.76%
1200 sq feet	1	1.35%
1300 sq feet	1	1.35%
2000 sq feet	6	8.11%
2500 sq feet	1	1.35%
3000 sq feet	2	2.70%
3150 sq feet	1	1.35%
3500 sq feet	1	1.35%
4000 sq feet	1	1.35%
4500 sq feet	1	1.35%
5000 sq feet	1	1.35%
5500 sq feet	1	1.35%
6000 sq feet	1	1.35%
25000 sq feet	2	2.70%
3rd of an acre	1	1.35%
Lots of parking space	1	1.35%
Don't Know	38	51.35%

Q20. What are the main factors which would INHIBIT you from relocation or opening a new site/premises in your preferred area?**All respondents**

Total	300	
Lack Of Availability of site/premises	87	29.00%
Lack Of Appropriate Quality of premises	32	10.67%
Commercial property costs	50	16.67%
Ability to expand existing site	13	4.33%

Lack Of Labour availability	4	1.33%
Lack Of Quality/skills of workforce	2	0.67%
Labour Cost	2	0.67%
Living Costs (i.e. housing etc.)	8	2.67%
Distance from customers	15	5.00%
Distance from suppliers	6	2.00%
Road infrastructure	16	5.33%
Tied to Lease	19	6.33%
Lack of car parking	24	8.00%
Lack of public transport	7	2.33%
Established in present location	12	4.00%
Only recently moved	3	1.00%
Planning permission difficulties	2	0.67%
Business rates	3	1.00%
The expense	2	0.67%
The nature of our business	4	1.33%
Suitable area at present	3	1.00%
Work from home	7	2.33%
Will retire soon	15	5.00%
Happy with present location	21	7.00%
Don't need to / Don't want to relocate	57	19.00%
Don't Know / No reason	14	4.67%

Q21A. Finally a couple of quick questions regarding the current business climate - How do you expect your company to perform over the next 3 to 5 years - do you expect business to:-

All respondents

Total	300	
Decline	23	7.67%
Remain the same	106	35.33%
Grow by up to 5%	91	30.33%
Grow by 5 to 10%	40	13.33%
Grow by 11 to 20%	21	7.00%
Grow by more than 20%	19	6.33%

Q21B. And longer term, over the next 6 to 10 years - how do you expect your business to perform? do you expect business to:-

All respondents

Total	300	
Decline	27	9.00%
Remain the same	98	32.67%
Grow by up to 5%	67	22.33%
Grow by 5 to 10%	63	21.00%
Grow by 11 to 20%	24	8.00%
Grow by more than 20%	21	7.00%

Q22. Over the next 12 months do you expect the staffing levels in your business to:-

All respondents

Total	300	
Increase	83	27.67%
Remain the same	200	66.67%
Decrease	5	1.67%
Don't Know	12	4.00%

Q23. Do you experience any problems in recruiting staff?**All respondents**

Total	300	
Yes	68	22.67%
No	232	77.33%

Q24V. What type of vacancy has been most difficult to fill?**Experience problems recruiting staff**

Total	68	
Administration staff / Clerical / Office staff	4	5.88%
Attended petrol pump staff	1	1.47%
Butcher	1	1.47%
Cabinet makers	1	1.47%
Chef	2	2.94%
Cleaning staff	2	2.94%
Care assistant / Nursery nurse	2	2.94%
Computer programmers	3	4.41%
Trainee mechanics / Mechanics / Mechanical engineers	7	10.29%
Deliver drivers / Drivers / HGV drivers / Tractor drivers	4	5.88%
Evening cashier	1	1.47%
Grooms / Stable hands	1	1.47%
Skilled printers	1	1.47%
Kitchen designer	1	1.47%
Labourers	5	7.35%
Foundry workers	1	1.47%
Panel beaters	1	1.47%
Barstaff / waiting staff	2	2.94%
Green keeping staff	1	1.47%
Qualified accountants	1	1.47%
Qualified estate agents	1	1.47%
Hairdressers	2	2.94%
Sales representative / Sales staff	6	8.82%
Graphic designers	1	1.47%
Consultant engineers / Draftsmen / Technical engineers / Architects	4	5.88%
Tradesmen	2	2.94%
Surveyors	1	1.47%
Trainee / Apprentices	2	2.94%
Skilled staff / Experienced / Trained	6	8.82%
Any/All vacancies	6	8.82%

Q25V. Why do you think these vacancies are hard to fill?**Experience problems recruiting staff**

Total	68	
Lack of skills / training in this area	26	38.24%
Low paid work	4	5.88%
Unsocial / long hours	3	4.41%
General shortage of skilled staff	8	11.76%
They don't want to get their hands dirty	3	4.41%
Lack of interest in the industry	4	5.88%

Lack of motivation to work	4	5.88%
transport issues	4	5.88%
Lack of people / suitable staff	5	7.35%
Too expensive to train staff	3	4.41%
Not enough demand in this type of job	2	2.94%
Too much demand in this product	1	1.47%
Poor location and building	1	1.47%
Don't know	3	4.41%

Q26V. What action have you taken or do you plan to take in order to help recruit more staff?

Experience problems recruiting staff

Total	68	
Advertise	19	27.94%
Offer apprenticeship / take on trainee	4	5.88%
Use job centre	7	10.29%
Headhunt / Poach staff from competitors	5	7.35%
In house training used	5	7.35%
Find people through word of mouth / Grapevine	2	2.94%
Offer NVQ training as part of job	1	1.47%
Recruit from overseas	3	4.41%
Take on graduates	3	4.41%
Approach colleges	1	1.47%
Put prices up	1	1.47%
Recruit from outside of this area	1	1.47%
Use recruitment agency	1	1.47%
Nothing	20	29.41%
Don't know	2	2.94%

Q27. Are there any shortages of skills affecting your business?

All respondents

Total	300	
Yes	65	21.67%
No	235	78.33%

Q28AV. What are these skill shortages that affect your business ?

Have skills shortages

Total	65	
Engineering / Fitting / Mechanics	17	26.15%
General skills experience	13	20.00%
Skilled labouring	7	10.77%
Driving (HGV etc.)	4	6.15%
Youngsters prepared to learn a new skill	4	6.15%
Bookbinding / Printing	3	4.62%

Carpentry	3	4.62%
Chef / Cooking	3	4.62%
Accountancy / Bookeeping / Insurance	2	3.08%
Hair styling	2	3.08%
Electrical engineering	2	3.08%
Sales	2	3.08%
Estate agency / Surveying	2	3.08%
Architecture / Planning / Designing	2	3.08%
Graduates	2	3.08%
Bricklaying	1	1.54%
Computer programming	1	1.54%
Chinese language	1	1.54%
Dental technician	1	1.54%
Flower arranging	1	1.54%
Farming	1	1.54%
Plumbing	1	1.54%
Butchery	1	1.54%
Nursery nursing	1	1.54%

Q28B. What do you think will be the effect of skills shortages on your company's performance at this site ?

Have skills shortages

Total	65	
Short term loss of potential earnings	38	58.46%
Short term reduction in profitability	16	24.62%
Curtailement of expansion plans	13	20.00%
Cease trading / sell the company	6	9.23%
Seriously consider re-locating to an area where skills are more plentiful	0	0.00%
Close this site and relocate elsewhere in the UK	0	0.00%
Close this site and relocate outside the UK	1	1.54%
Increase workload of present staff	3	4.62%
Employ more Eastern Europeans	1	1.54%
No effect	7	10.77%
Don't know	2	3.08%

Q29V. Do you anticipate any major concerns or problems that will affect your business over the next five years?

All respondents

Total	300	
No additional concerns	203	67.67%
Bird Flu	2	0.67%
Business rates / Council taxes rising	16	5.33%
Material prices	6	2.00%
Interest rates	3	1.00%

Recruitment / Finding suitably qualified staff	21	7.00%
Competition / Cheap imports	15	5.00%
Rent increases	2	0.67%
Parking issues	7	2.33%
Increases in legislation	17	5.67%
Accountancy	1	0.33%
Recession	2	0.67%
Property prices	4	1.33%
Inflation	1	0.33%
Political climate	1	0.33%
Road charging / Congestion charging	4	1.33%
Poor investment in roads / Recycling opportunities	3	1.00%
Internal errors	2	0.67%
Climate change / Recycling opportunities	2	0.67%
Internet connection	2	0.67%
Lack of business	4	1.33%
Lack of water / Quality of water	2	0.67%
Inappropriate planing / developments - approved or disapproved	4	1.33%

Q30A. Do you think your business would benefit from - Better access to publicly funded staff training ?

All respondents

Total	300	
Yes	97	32.33%
No	183	61.00%
Don't Know	20	6.67%

Q30B. Do you think your business would benefit from - More advice on training opportunities available locally ?

All respondents

Total	300	
Yes	94	31.33%
No	188	62.67%
Don't Know	18	6.00%

Q31V. What specific areas of staff training do you need, either currently or in the future ?

All respondents

Total	300	
Accounting / Financial Management	5	1.67%
Administrative / Clerical	6	2.00%
Automotive engineering / Panel beaters & Sprayers	8	2.67%
Bookbinding	1	0.33%
Arts & Handicrafts / Design & Creativity	2	0.67%

Business Management	10	3.33%
Cabinet making	2	0.67%
Carpentry	2	0.67%
Bricklaying	1	0.33%
Skilled labouring	6	2.00%
Chef / Cooking	2	0.67%
Computer / IT Training	15	5.00%
Customer care / Retail	3	1.00%
Dental technician	1	0.33%
Design engineers	1	0.33%
Driver training	4	1.33%
Engineering	6	2.00%
First aid	3	1.00%
Foam conversion	1	0.33%
Farming / Stockmanship	3	1.00%
Green keeping	1	0.33%
Hairdressing	1	0.33%
health & Safety	13	4.33%
Maths	1	0.33%
Moulding	1	0.33%
Nursery nursing	1	0.33%
Off shore training	1	0.33%
Butchery	1	0.33%
Sales	6	2.00%
Architecture / planning design	2	0.67%
In house training is adequate	4	1.33%
General skills	11	3.67%
Nothing / Don't know / Not applicable	196	65.33%

Q32. Do you think there is adequate provision for [Q31] Training locally?

All respondents

Total	300	
Yes	45	15.00%
No	190	63.33%
Don't Know	65	21.67%

Appendix II - Charts























































