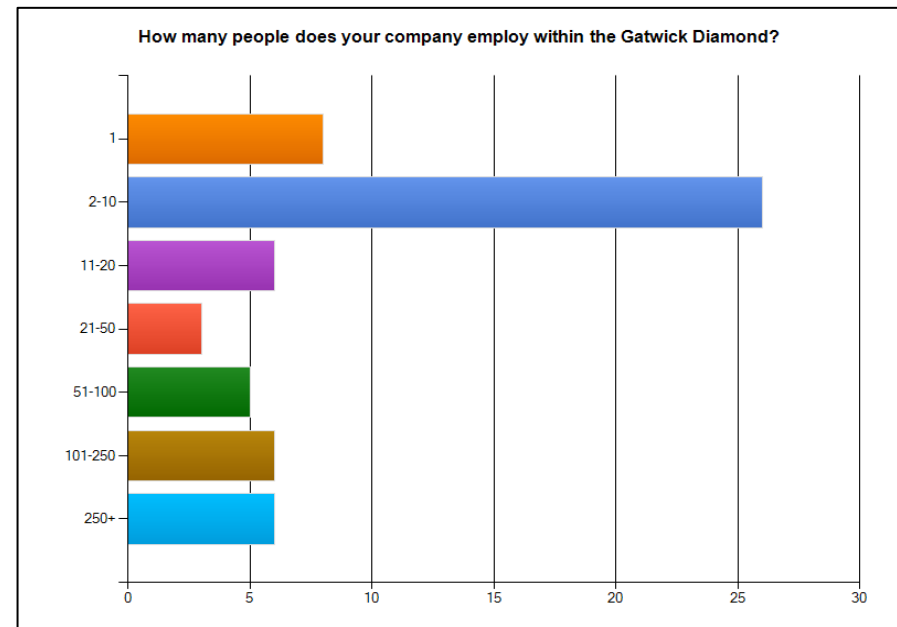
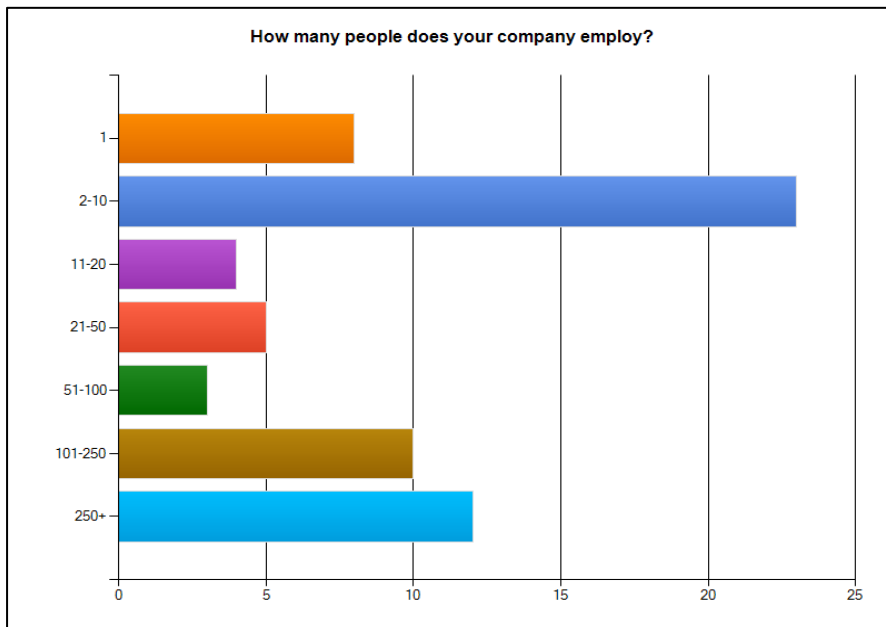
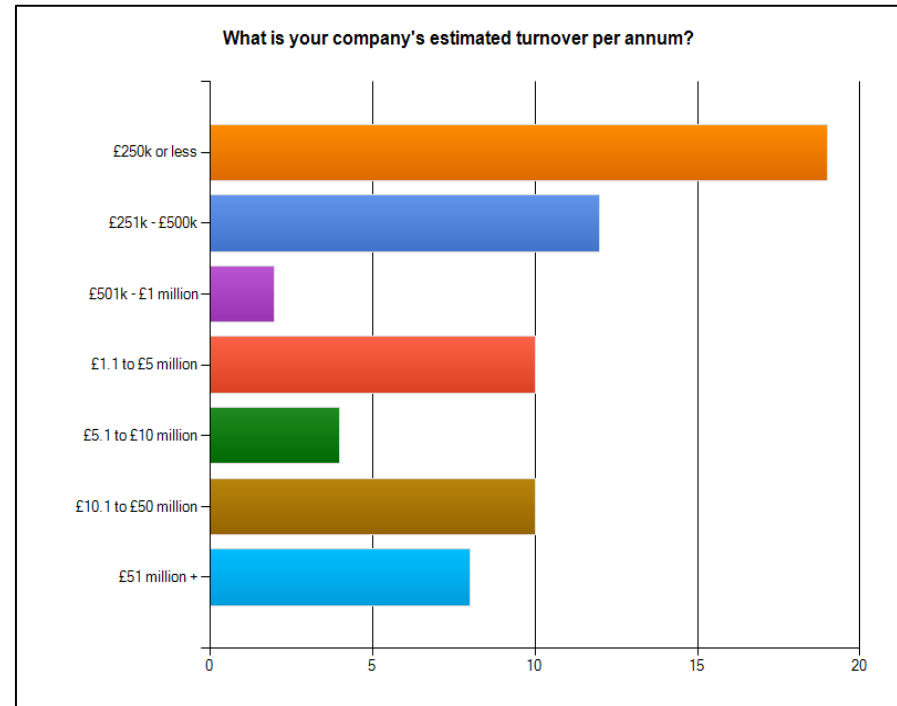
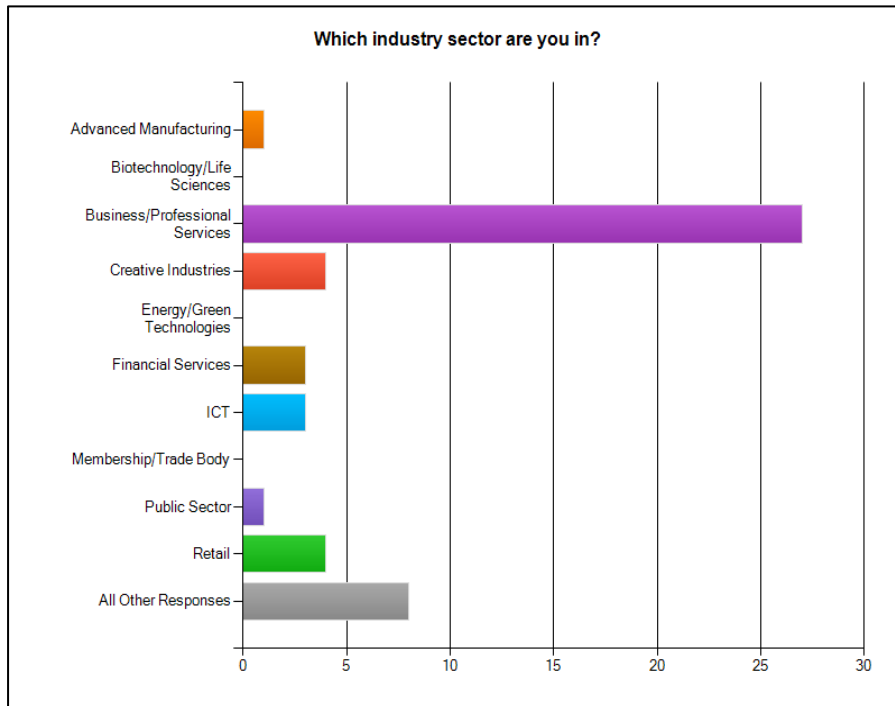


Gatwick Diamond Initiative - Business Barometer Survey Findings – August 2011

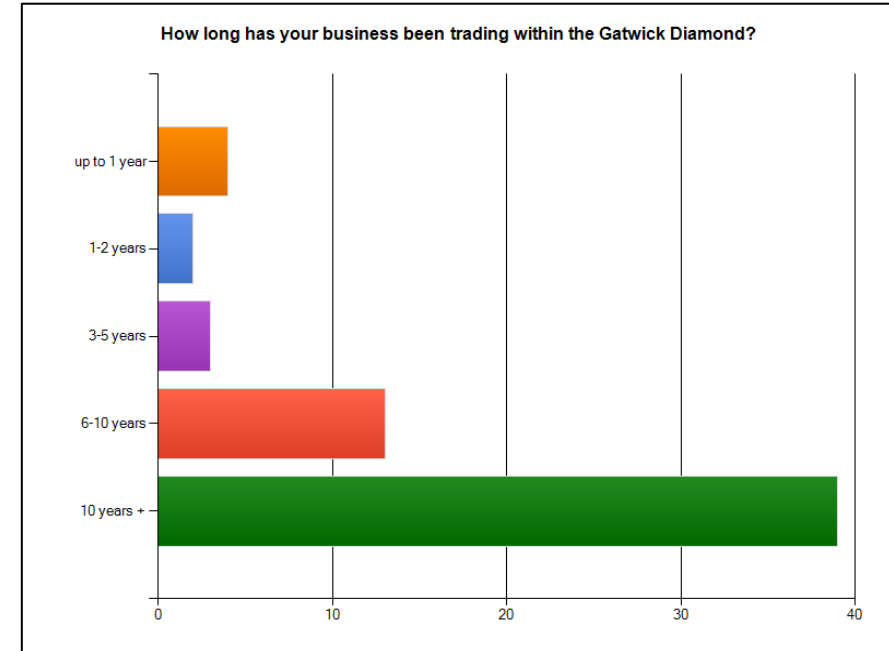
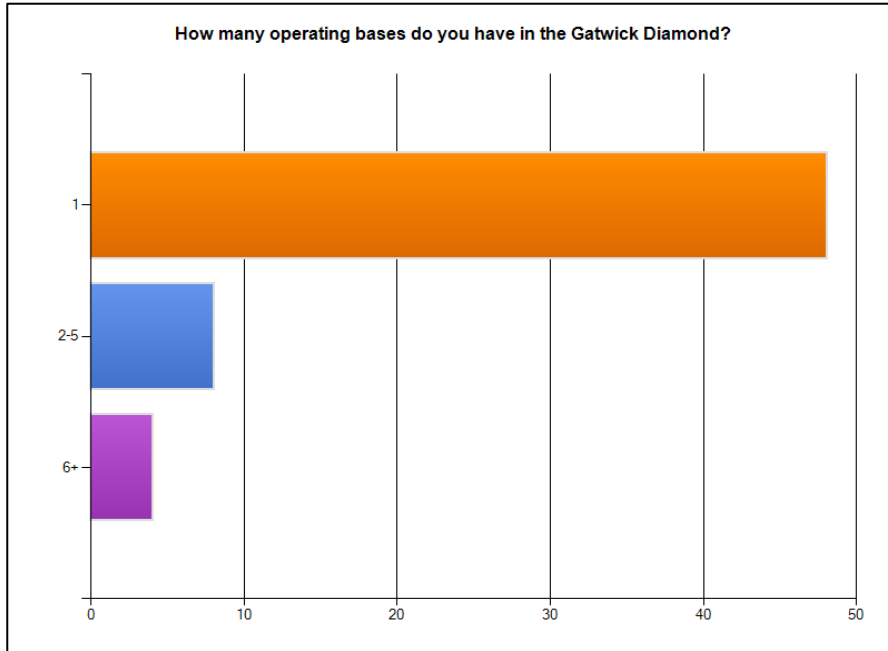
Background:

- This Business Barometer research study is commissioned by The Gatwick Diamond Initiative (GDI) to help monitor local economic conditions on a quarterly basis.
- Conducted by Prowse & Company Ltd, this online survey is designed to source primary data from local businesses to measure how the Gatwick Diamond is performing as a location for business.
- The survey provides quantitative and qualitative evidence of business trends to aid the three Gatwick Diamond Task Groups in their activities. Importantly, the survey offers a snapshot of business confidence in the Gatwick Diamond area.
- In addition to general business questions each survey also considers a particular theme. This quarter focuses on transport and infrastructure issues and the findings will be fed into activities undertaken by the GDI Connect Group.
- A total of 71 responses were received during the months of July and August 2011.

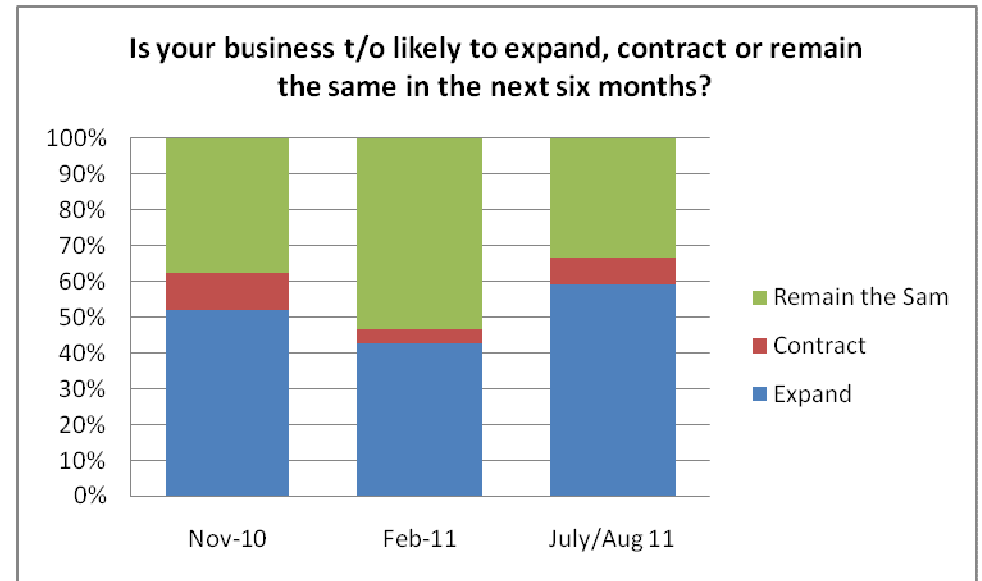
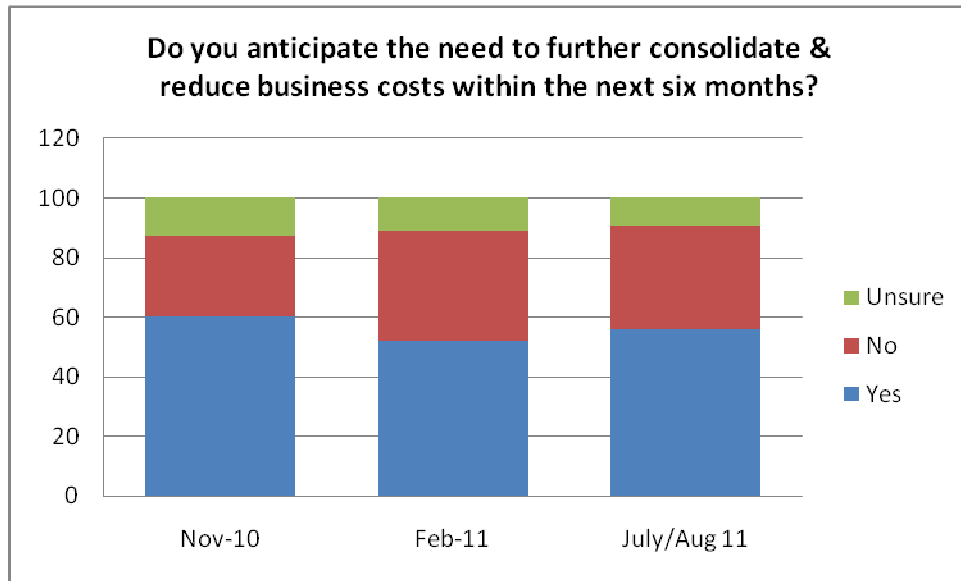
RESPONDENTS' PROFILE:



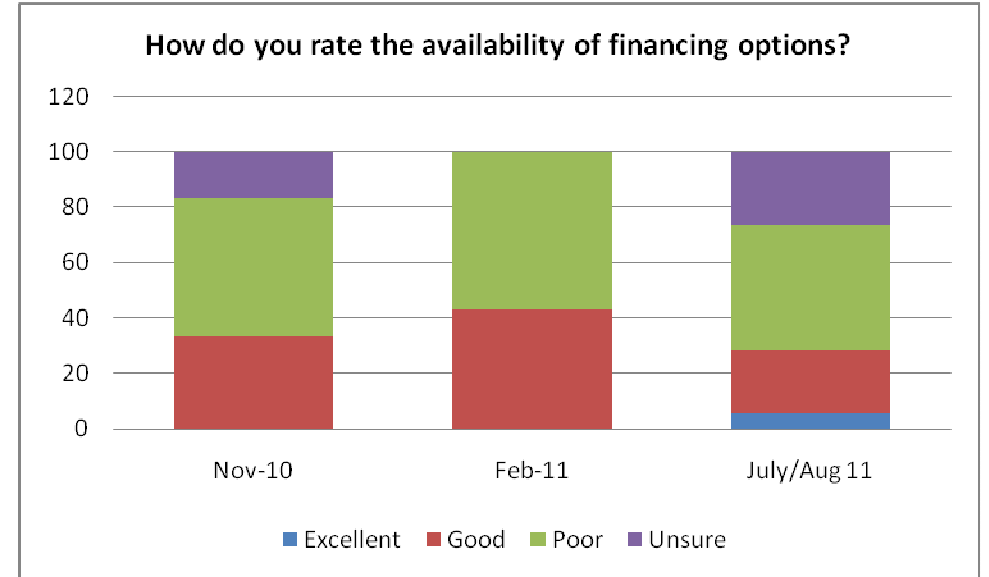
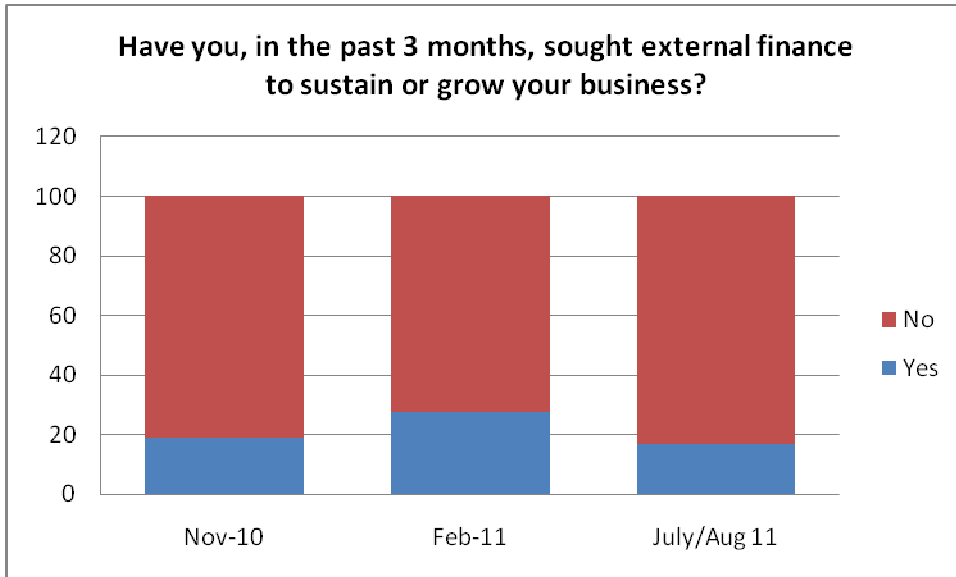
RESPONDENTS' PROFILE (cont)



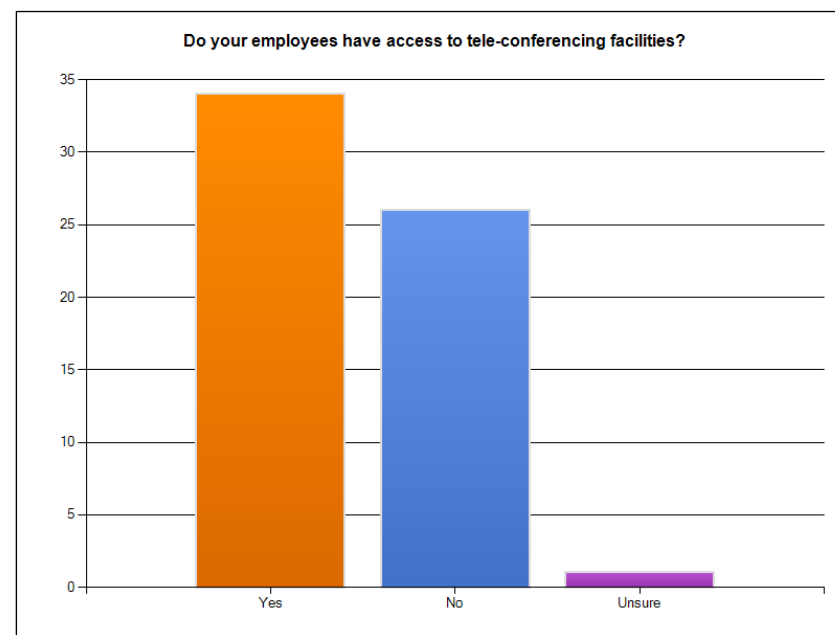
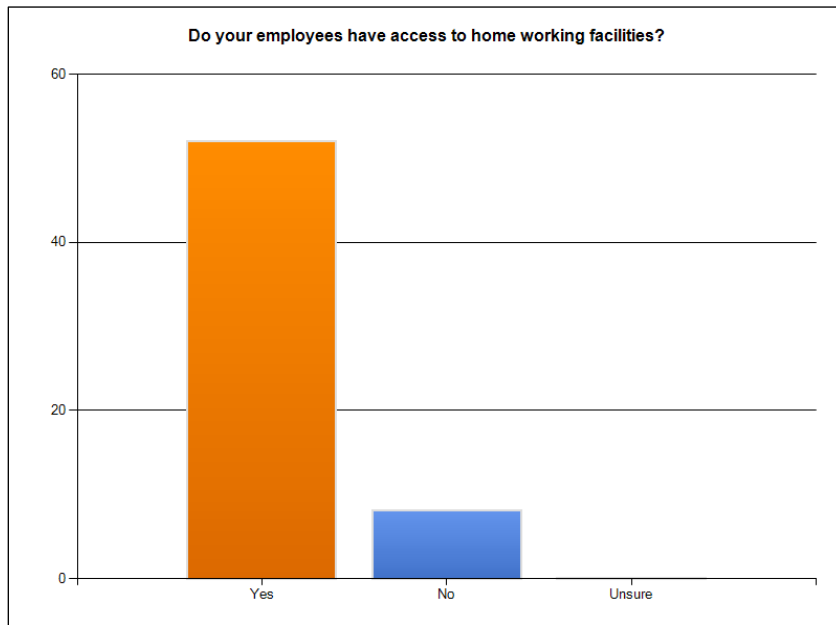
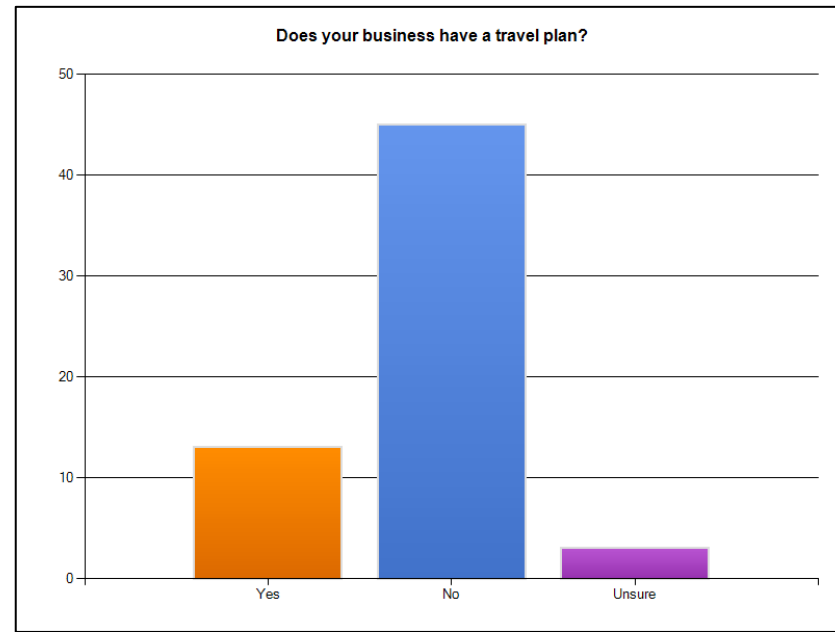
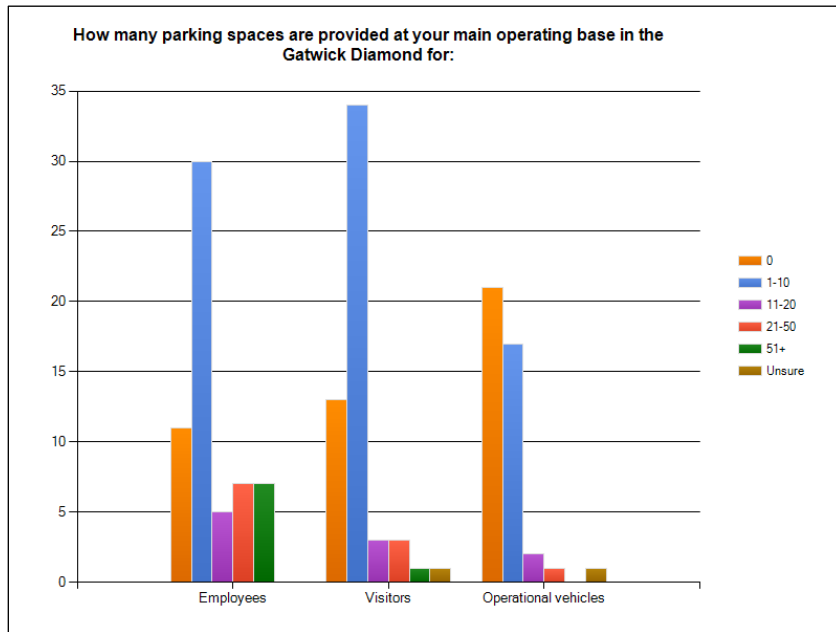
GENERAL BUSINESS CONFIDENCE



ACCESS TO FINANCE



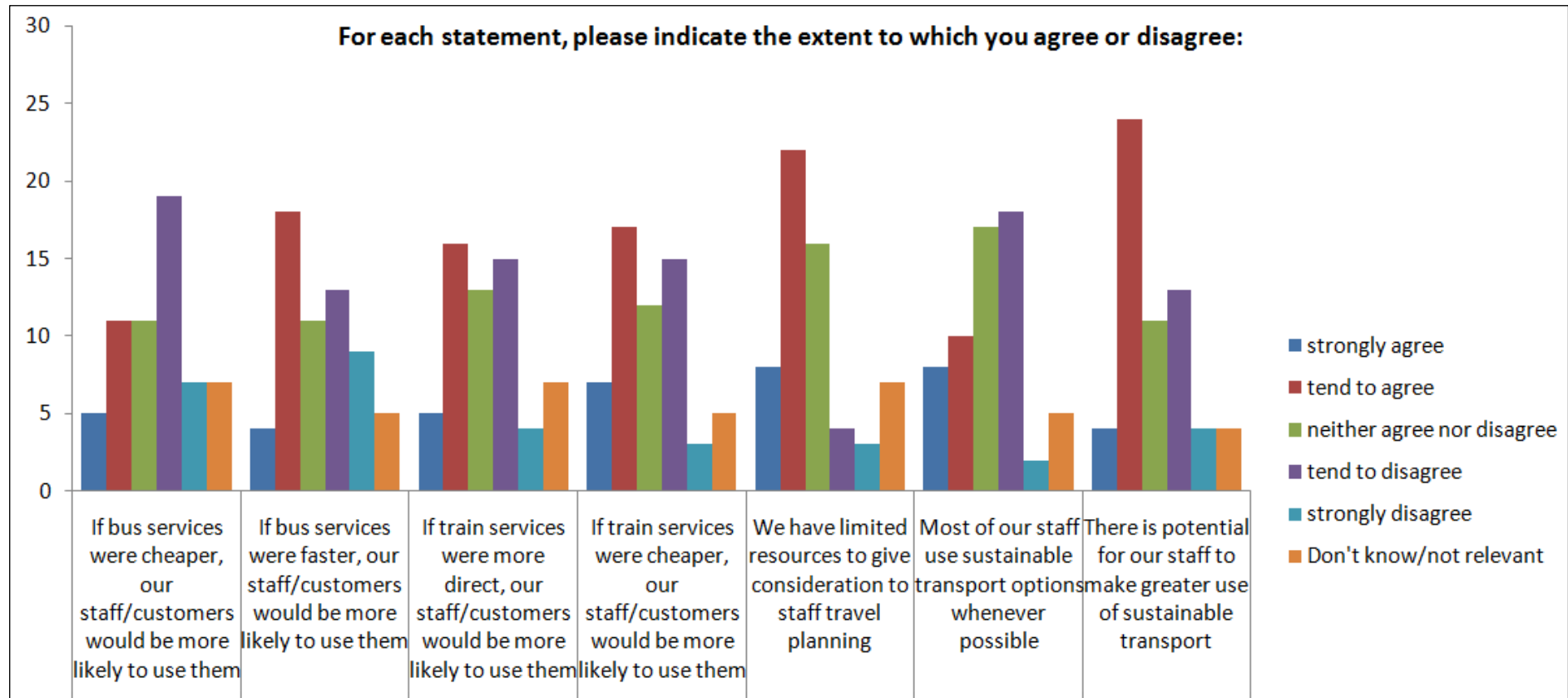
TRANSPORT & INFRASTRUCTURE



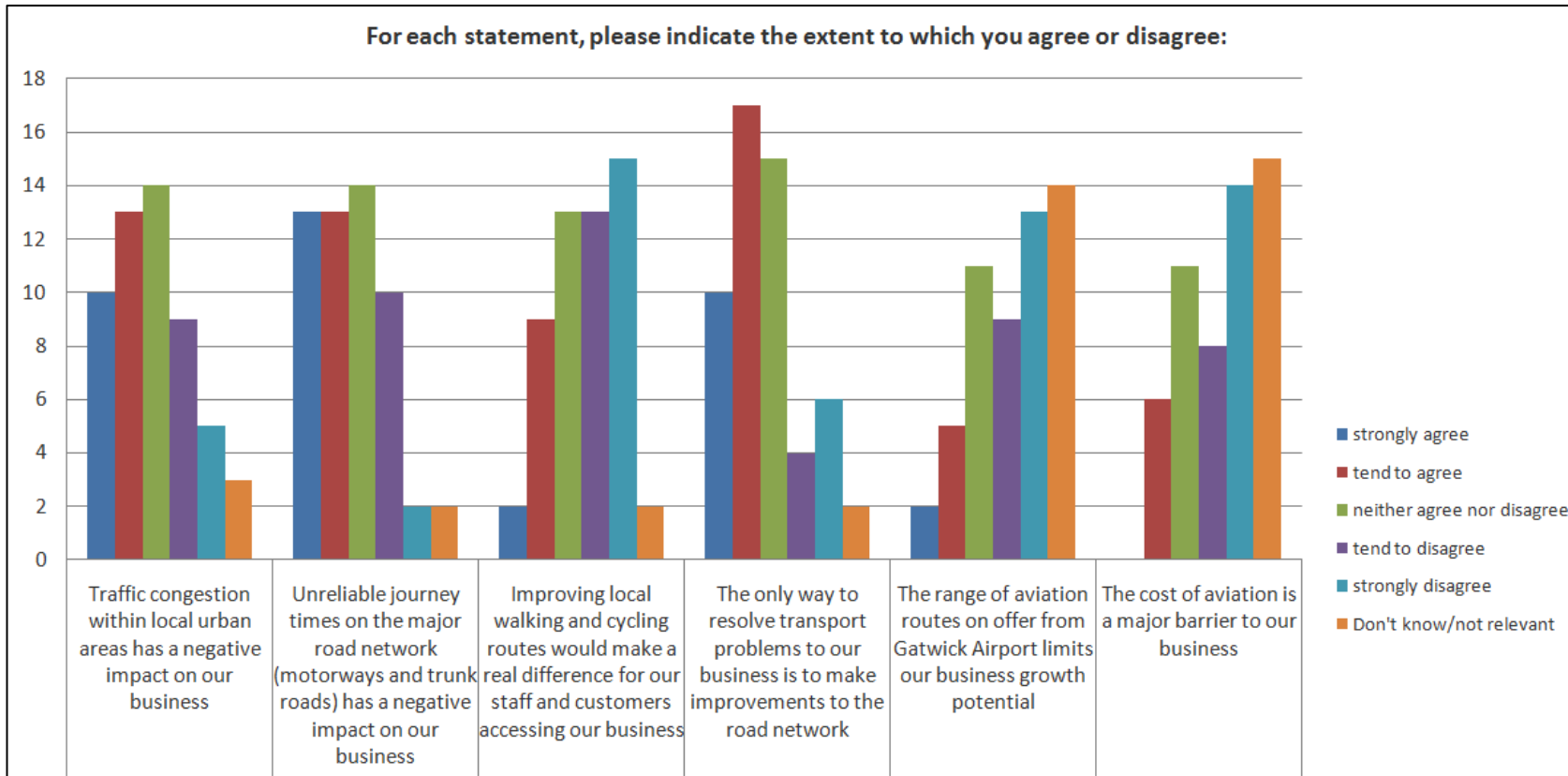
PARKING



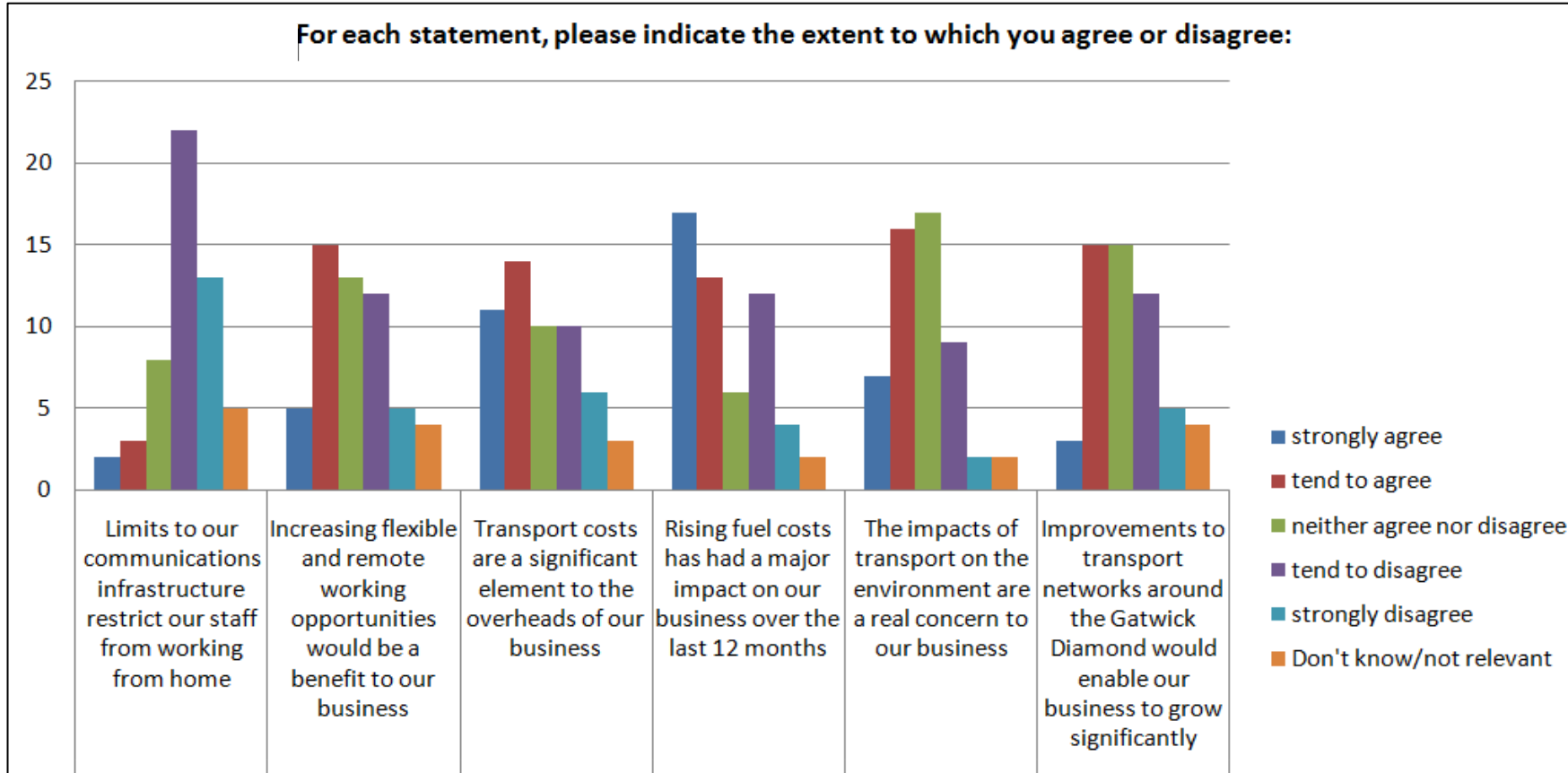
TRANSPORT ISSUES IN RELATION TO STAFF AND CUSTOMERS:



TRANSPORT GENERAL:



TRANSPORT GENERAL (2):



QUALITATIVE VERBATIM COMMENTS:

What improvements to the transport and communications network around the Gatwick Diamond would enable your business to grow? Please explain where they might be?

- *More integrated use of Gatwick airport for rail services would be good to encourage commuters - the car parking rate is more than the train fare.*
- *Parking for clients and staff.*
- *A272 link to be completed around Haywards Heath.*
- *Haywards Heath station and surrounds to be improved together with infrastructure.*
- *Although our head office is in the Diamond, our growth will come either through our sites around the UK or through phone and web traffic. Improvements to the road and rail network would help the efficiency of our head office business and the attractiveness to potential staff from outside the immediate area of East Grinstead. The benefit to us of effective road improvements would be a reduction in congestion. In terms of rail, it would be more direct and faster travel from East Grinstead and connections East/West across the Diamond, not just into and out of London (North/South). The Gatwick Express, is a positive help, but has been degraded at peak times with no reduction in the premium cost – result. It is avoided where possible, but the alternative times from East Grinstead don't help!*
- *Improvement to the A27 Between Shoreham & Arundel.*
- *Car sharing and reduction in the volume of non-essential car journeys would benefit business traffic in the Gatwick area.*
- *Travel within the Crawley area is severely hampered by Public Transport. The level crossings make access to central Crawley difficult. The fastway buses restrict traffic flows. The traffic controls at major junctions don't work. We moved to Broadfield in 1990 to avoid traffic problems in central Crawley. Manor Royal is a no go area and I would never consider locating my business there. In 4 years our lease is up for renewal and I will be looking very closely at other areas outside of Gatwick Diamond.*
- *Growth of long haul routes at Gatwick airport.*
- *Safe walkway from Airport to City Place.*
- *More reliable bus route service.*
- *Faster broadband is already coming and that should help.*
- *Transport is about petrol and running costs. Lower them and then people would travel more again.*
- *Increase regularity and reliability of trains.*
- *Cycle paths.*
- *Cheaper car parking.*
- *Reduced congestion hence reducing journey times to / from clients.*
- *No acceptable public transport services for client visits except to/from London - none within the Diamond.*

What improvements to the transport and communications network around the Gatwick Diamond would enable your business to grow? Please explain where they might be? (cont/2)

- *Better transport links from Burgess Hill station to our Head Office in the Victoria Business Park would make it much easier for staff who use the train. Currently it is either a very long walk or a shared taxi which is an additional cost.*
- *For us Gatwick Airport is a significant hub. Not only for our international business (90% of revenue) but as a regular route to London for meetings. Costs of trains to London have significantly increased despite a worse morning service (full Gatwick Express "commuter" trains from Brighton !) and parking has become a ridiculous price for daily short term parking meaning train and parking for a day in London now exceed £60.00.*
- *Incoming overseas clients at Gatwick are more and more frequently commenting on two factors: The quality/cost of train travel to London and the appalling state of the airport. Often described as 3rd World!*
- *More flexibility on parking facilities - also control on train fare increases - costs make this a very unattractive option for lower paid staff.*
- *A22 East Grinstead.*
- *Improvements to M25 exits at Junction 9, Leatherhead.*
- *Improve access to Crawley and therefore expand business in region.*
- *Integration of trains, buses and car parks in the region generally would assist people in their travel to work.*
- *Bypass around Worthing-Chichester; better, faster, cleaner, more frequent trains to and from London Victoria; better and cheaper parking in Brighton; a more joined-up approach from local authorities and utilities to road works generally.*
- *We have for many years used flexible working practice. Most of our people are home based. The really critical issue is broadband provision. The real investment should be to improve this as if more people worked from home some of the transport issues would be eased.*
- *There is also the situation of more and more housing with no real expansion to the road system. Bus transport is not ideal - we used to have an employee who could either get in at 0800 or 1000 for a journey from Cuckfield to Haywards Heath. Luckily for him we have flexible working practices! Improve the A24 so the whole route from Horsham to Junction 9 of the M25 is dual carriageway.*
- *Faster non-stop trains to London stations from Horsham.*
- *Increase car parking provision in recognised industrial areas.*
- *Super-fast broadband accessible to all households.*

What is the most pressing business concern for you currently?

- *Funding cuts in education.*
- *Cuts in education budgets have a direct impact on our business.*
- *Limited economic confidence.*
- *Current economic climate.*
- *The overall effects of the current economic climate on our clients.*
- *Business confidence and consumer demand.*
- *The economy.*
- *The lack of funding available by the major banks for the purchase of premises.*
- *The depressed property market continues to limit the demand for planning consultancy and architectural services.*
- *Increasing our customer base.*
- *The drop in takings.*
- *Economy and its impact on consumers (our customers).*
- *The recession's effect on retail sales, the US\$ exchange rate and rising costs of raw materials and wages in China.*
- *State of economy. Low levels of corporate activity/investment.*
- *Economic climate / both domestic & international.*
- *Surviving.*
- *Obtaining new clients.*
- *Rising costs and inflation.*
- *Support for IT training costs & IT investment.*
- *Cashflow.*
- *Cash flow management.*
- *Sales and cashflow.*
- *Government red tape.*
- *Passive promotion of inward investment opportunities within the region.*
- *Finance for our clients.*
- *The current recession.*
- *Changes in my industry and trends reducing volume of business and cashflow.*
- *Increasing turnover.*
- *Increasing repeat business.*

What is the most pressing business concern for you currently? (cont)

- *Sustained business, where is the next major Government spend going to be?*
- *Securing new customers.*
- *To get more business.*
- *Future workload.*
- *Obtaining staff with the skills and experience required.*
- *Staff and customer parking.*
- *Retention of talent.*
- *Staff availability.*
- *Maintaining staff.*
- *Sustaining prices in export markets.*
- *Improving consistency of sales performance.*
- *Poor and unclear implementation of Government Policy for planning for the property industry.*
- *Engagement.*
- *Obtaining Planning consents.*
- *Reduction in grant for new social housing, new regulations for rent controls.*
- *Supplier performance.*
- *Impact of high VAT rate on customers who are not VAT-registered.*
- *Negative press, political and a few local traders comments regarding the economy which talks-down any good news.*

Finally, please advise if there is anything that you would like the Gatwick Diamond Initiative to focus upon in the year ahead:

