



Confidential

# Manor Royal BID Survey 2022

## Report V01



Prepared for: Steve Sawyer



Cert No. 0541

036



Cert No. 11321-ISMS-001  
ISO 27001

14 April 2022

Project number: 257012

Prepared by: Yvonne Taylor /Helen Goode/ Lottie Hayward-Williams

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# Project Background and Methodology



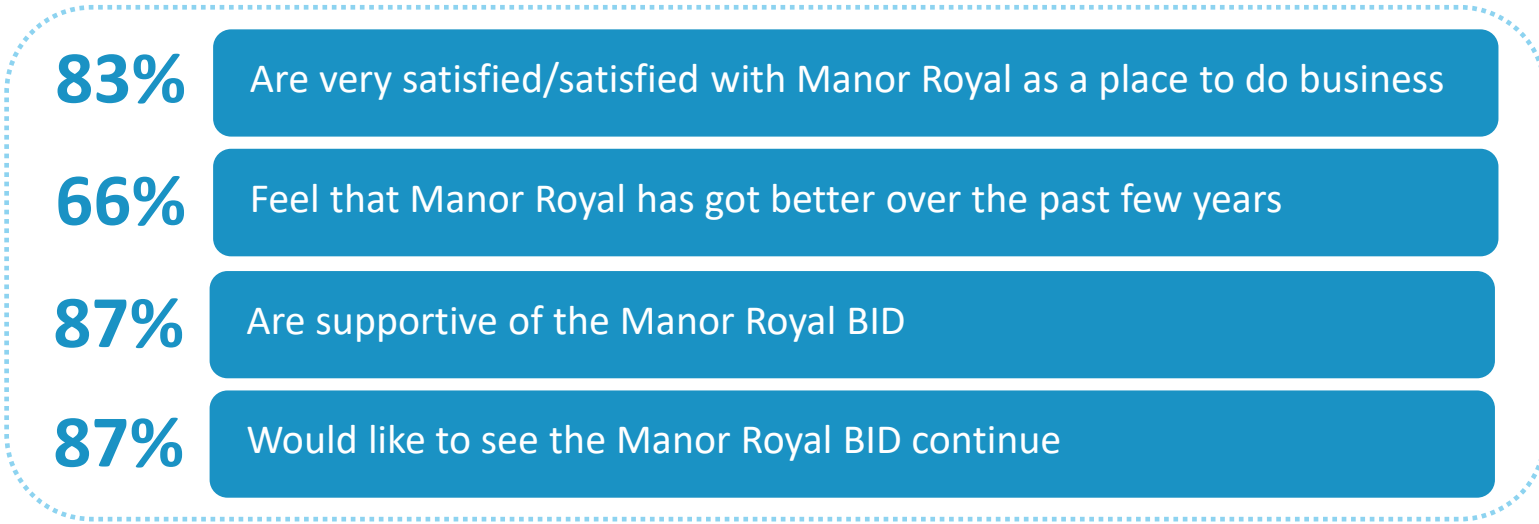
- \* The Manor Royal BID has been operational since 2013. As part of the BID process, next year businesses will have to vote to ensure its future.
- \* In addition to BID Levy contributions from businesses, the BID has so far attracted over £4m in this BID Term (2018-2023) and if it continues, it has already secured another £3.5m towards delivering further improvements to the area.
- \* If the BID continues and depending on what businesses say, the BID intends to carry on providing additional security and maintenance, subsidised travel and training, free job advertising and events, free security radios and business watch membership, free to access business directory, investment in infrastructure and facilities, free promotion and communications and support to making Manor Royal more environmentally friendly, attractive and sustainable with faster broadband.
- \* Manor Royal BID wanted to do a survey amongst businesses to assess and continue to monitor satisfaction levels, what issues businesses are facing and the priorities for Manor Royal BID to deliver.



## **Methodology:**

- \* Paper based and online survey distributed to Manor Royal BID contacts between January and April 2022.
- \* The survey was mailed to approx. 500 businesses across Manor Royal, all of varying sizes.
- \* We received 151 responses in total which is a good response rate of approx. 30%.

# Executive Summary



## Top issues for businesses (% very important)

1. Broadband speeds (64%)
2. Security and safety (62%)
3. Rising costs/inflation (59%)
4. Traffic and congestion (58%)
5. Conditions of roads/pavements (57%)
6. Tidiness (litter/rubbish) (53%)
7. Parking (47%)
8. Street scene quality (47%)
9. Climate change/sustainability (44%)
10. Staff recruitment (44%)

## Top areas for BID to support with (% very important)

1. Keep place tidy/well maintained (53%)
2. Lobby for investment in roads/pavement (51%)
3. Make broadband faster (49%)
4. Attract more investment to area (48%)
5. Represent & lobby on behalf of MR (44%)
6. Improve the facilities & infrastructure (43%)
7. Help solve parking problems (42%)
8. Help businesses invest in cheaper renewable energy (42%)
9. Establish EV Charging network (39%)
10. Additional security (39%)



## Top priority areas (% ranking in top 3)

1. Help solve parking problems (26%)
2. Lobby for investment in roads/pavement (24%)
3. More investment / Keep Tidy / Broadband (18%)



Base: 151 respondents taking part in the 2022 survey

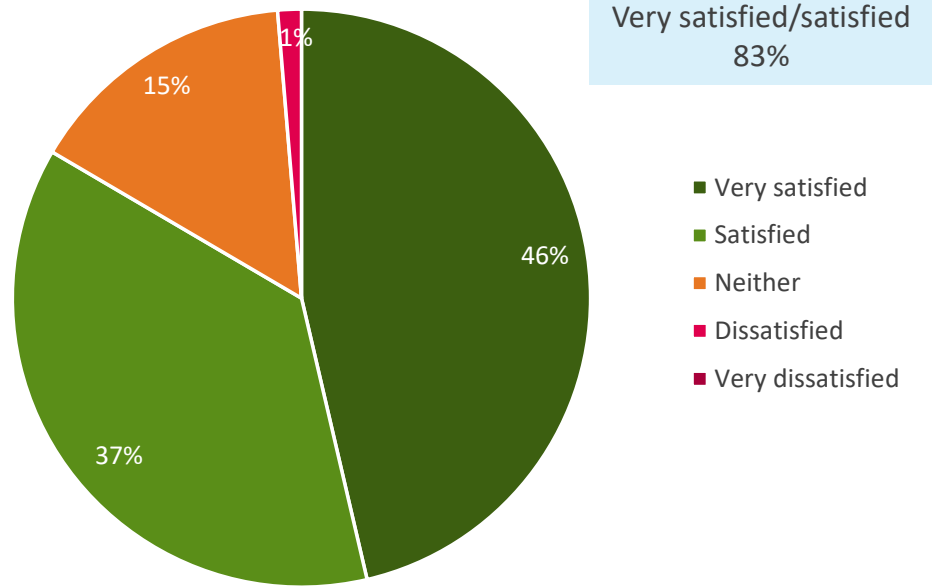
# About Manor Royal

# Satisfaction with Manor Royal as a place to do business



- \* Levels of satisfaction with Manor Royal are high in 2022 with 83% being 'very satisfied/satisfied', and 46% strongly so.
- \* Further, although the level of 'very satisfied/satisfied' has dipped this year, the level of 'very satisfied' is at its higher level over the last 7 years.
- \* Levels of dissatisfaction are lower than last year, but there has been some shift from 'satisfied' into 'neither satisfied nor dissatisfied' this year.

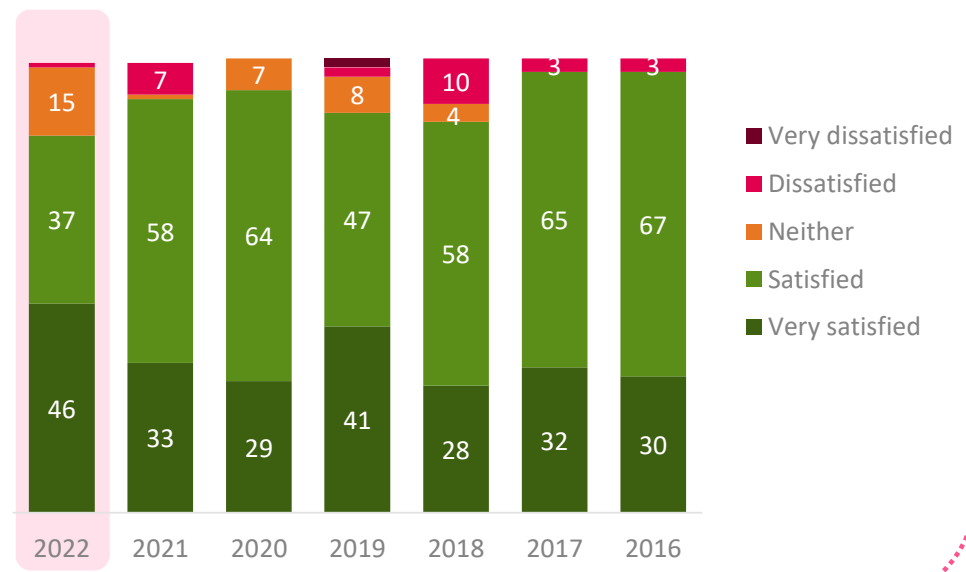
## 2022



Very satisfied/satisfied  
83%

- Very satisfied
- Satisfied
- Neither
- Dissatisfied
- Very dissatisfied

## Trend



- Very dissatisfied
- Dissatisfied
- Neither
- Satisfied
- Very satisfied

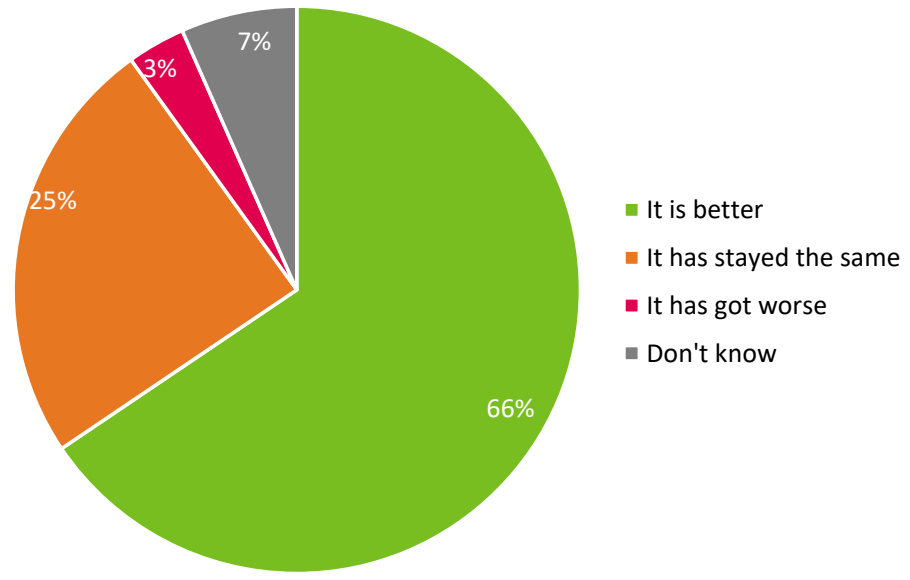
Q. How satisfied are you with MR as a place to do business?  
Base: 2022 (151). Bases for other years vary

# How Manor Royal has changed over past few years

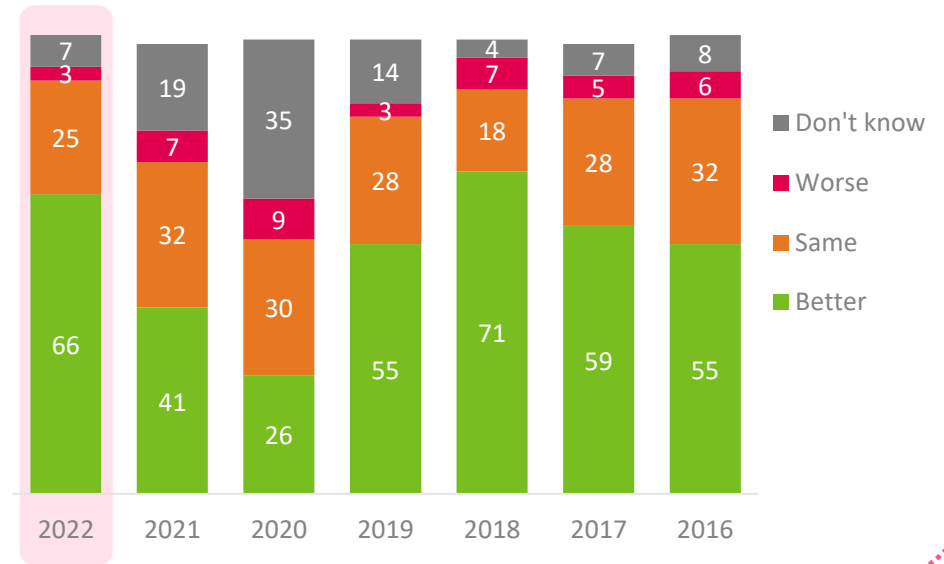


- \* Two-thirds (66%) feel that Manor Royal has improved over the past few years.
- \* Levels of positivity have picked up considerably since a dip in 2020.

**2022**



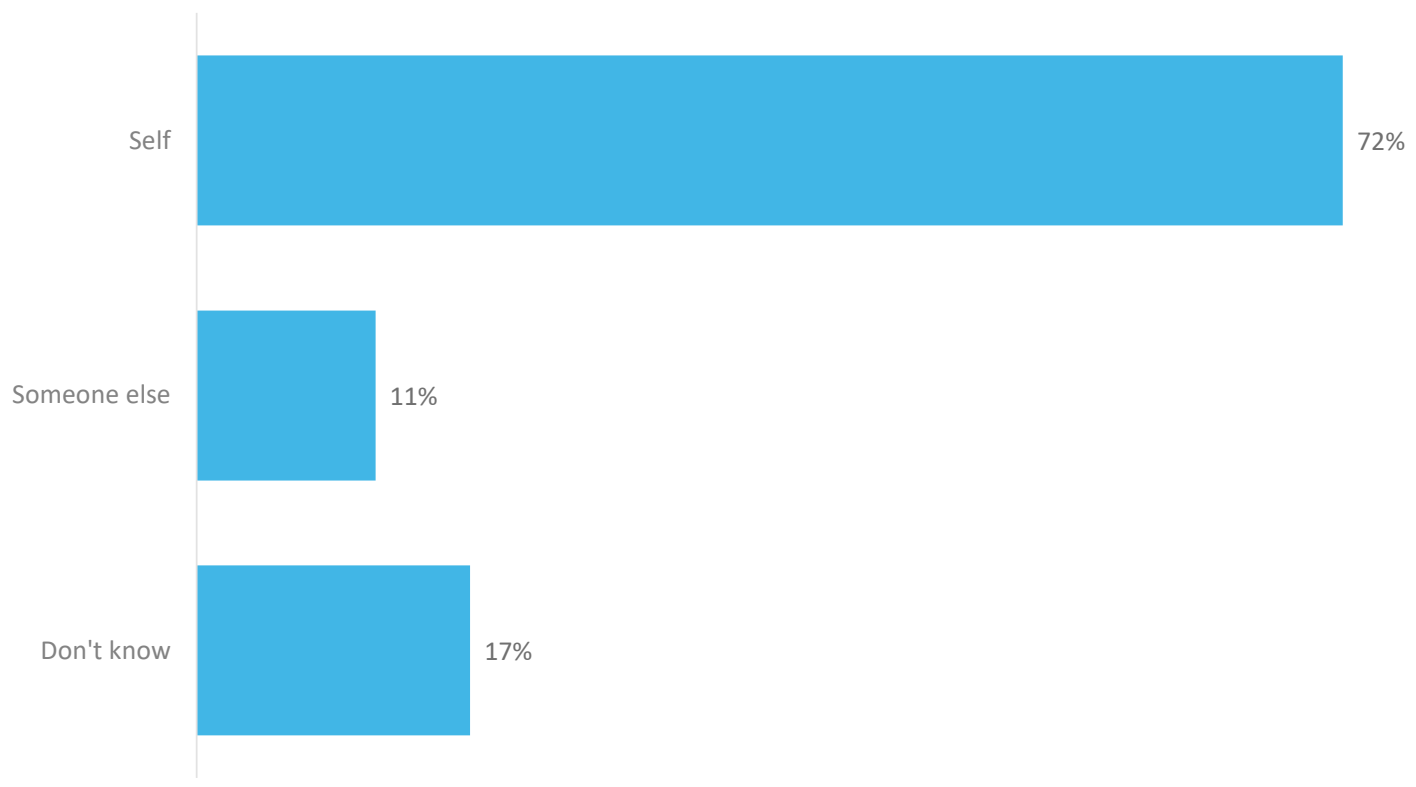
**Trend**



Q. How has Manor Royal changed over the past few years? Note question previously worded 'How has Manor Royal changed in the last year'  
Base: 2022 (151). Bases for other years vary

# Who votes on the BID

\* 72% of those filling out the survey vote on the BID themselves.



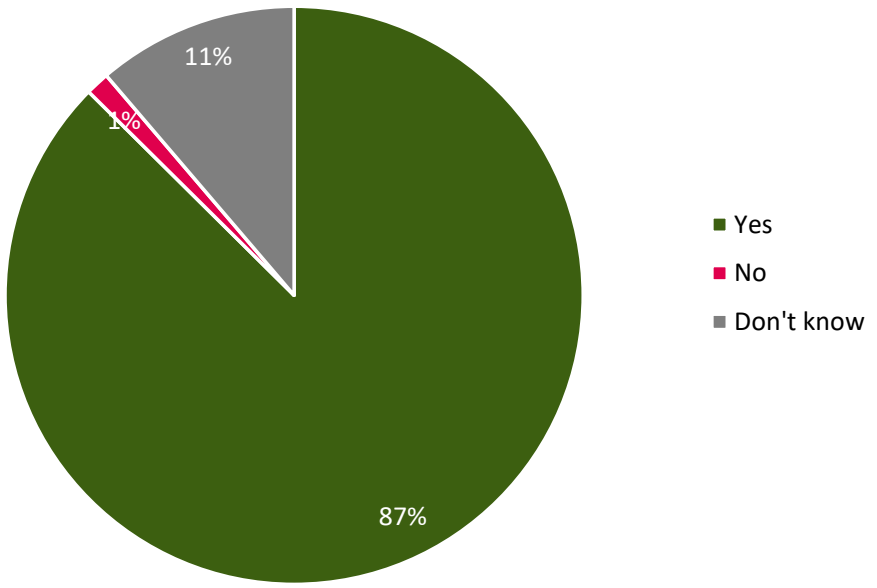
Q. Who in your company would vote on the bid?  
Base: 151 respondents taking part in the 2022 survey



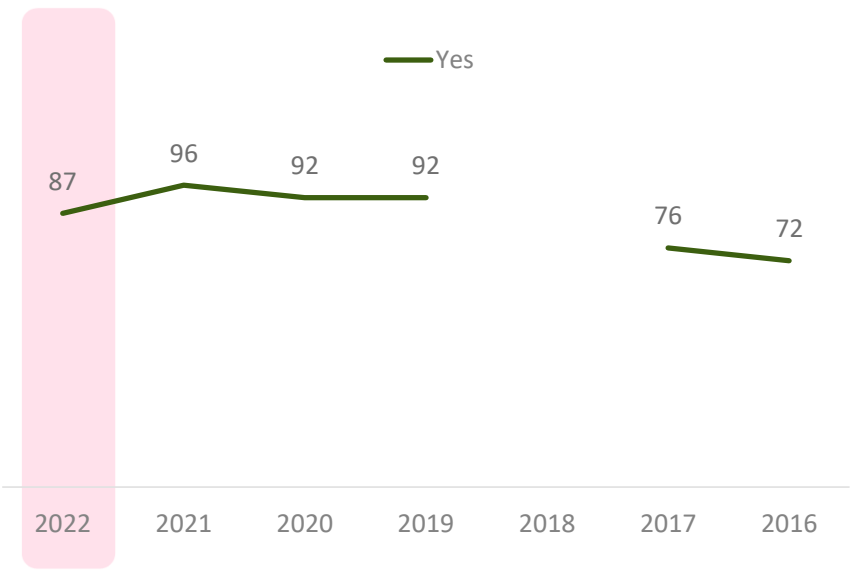
# Whether supportive of the BID

- \* 87% are supportive of the BID, which is lower than the last three years but much higher than it was in 2016 and 2017.
- \* 11% say 'don't know' which suggests they don't feel close enough to BID to give an opinion.

**2022**



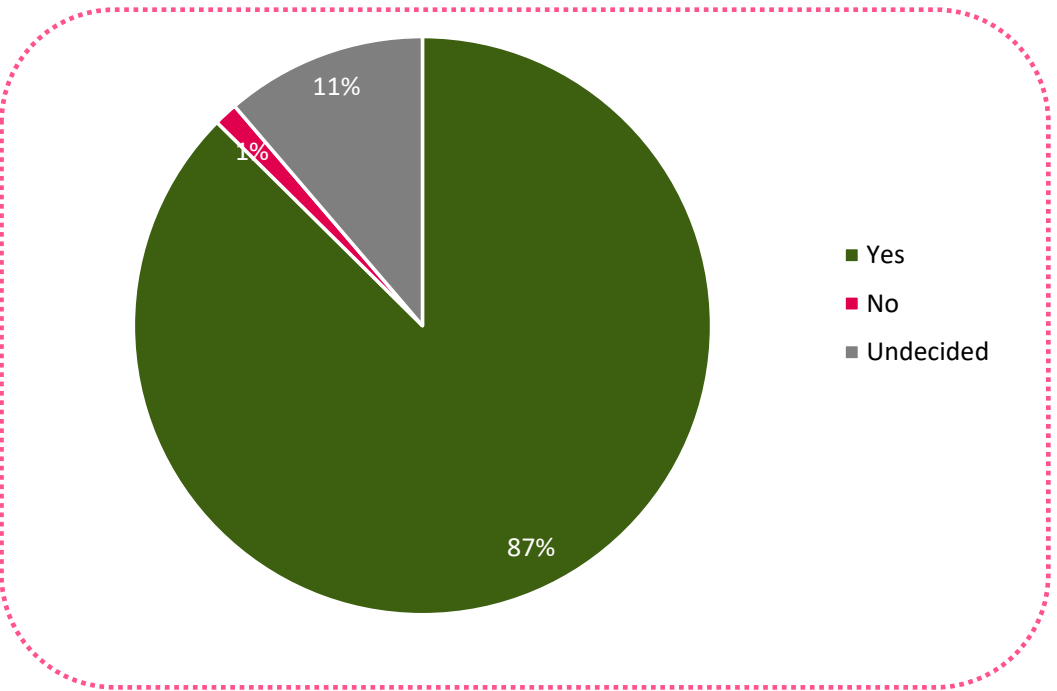
**Trend**



Q. Are you supportive of the BID?  
Base: 2022 (151). Bases for other years vary  
Data not available for 2018

# Whether want BID to continue

\* 87% would like to see the BID continue.



The majority of the 87% who said they want to see BID continue, also said that they are supportive of the BID.

Only 3 respondents gave different answers across the two questions.

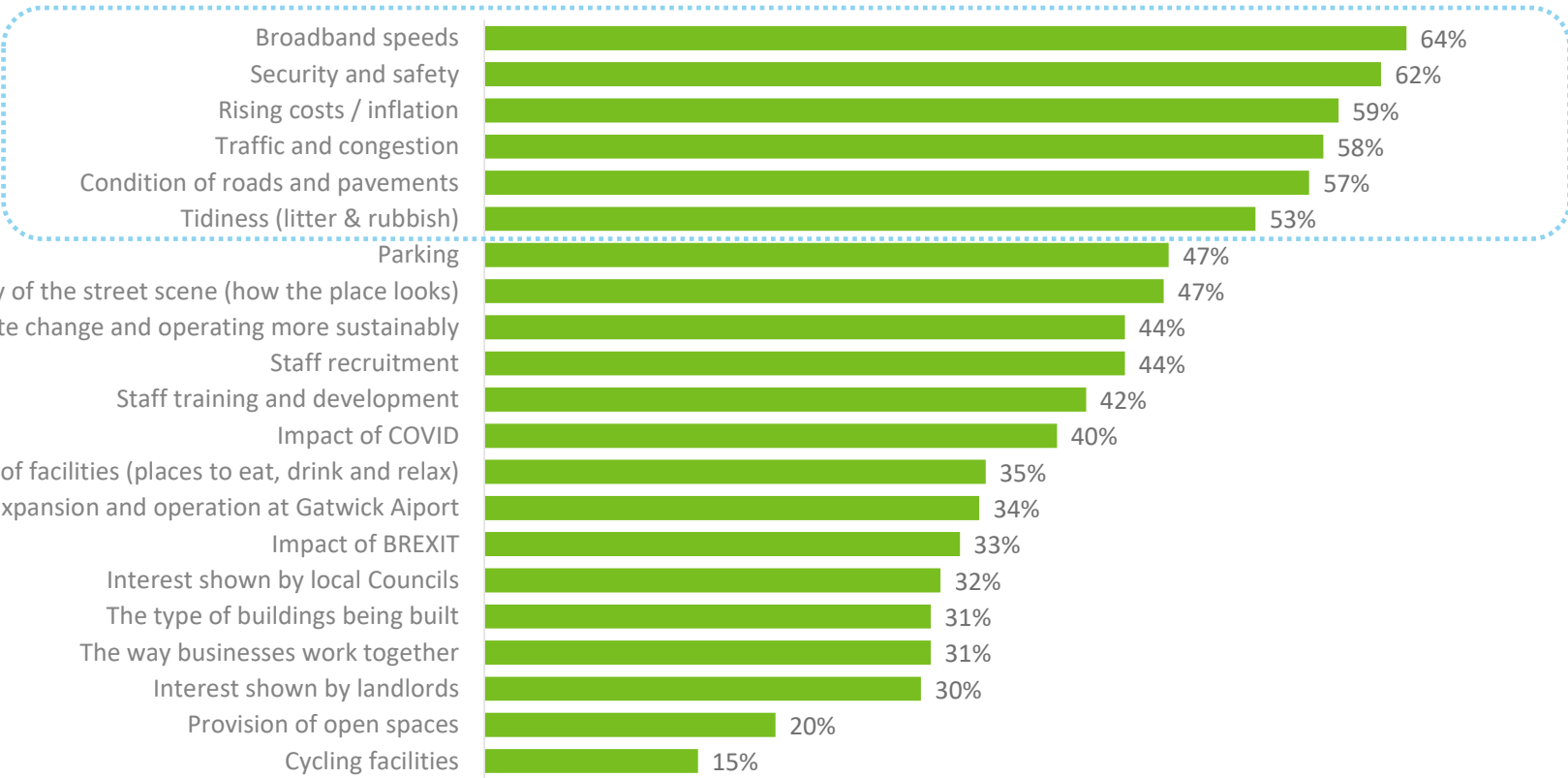
Q. Do you want to see the BID continue?  
Base: 151 respondents taking part in the 2022 survey. Back data not available

# Important issues for businesses

# Important issues for businesses: Top box (very important) %



\* The most important issues for businesses are broadband speeds, security and safety, rising costs/inflation, traffic and congestion, conditions of roads and pavements and tidiness.

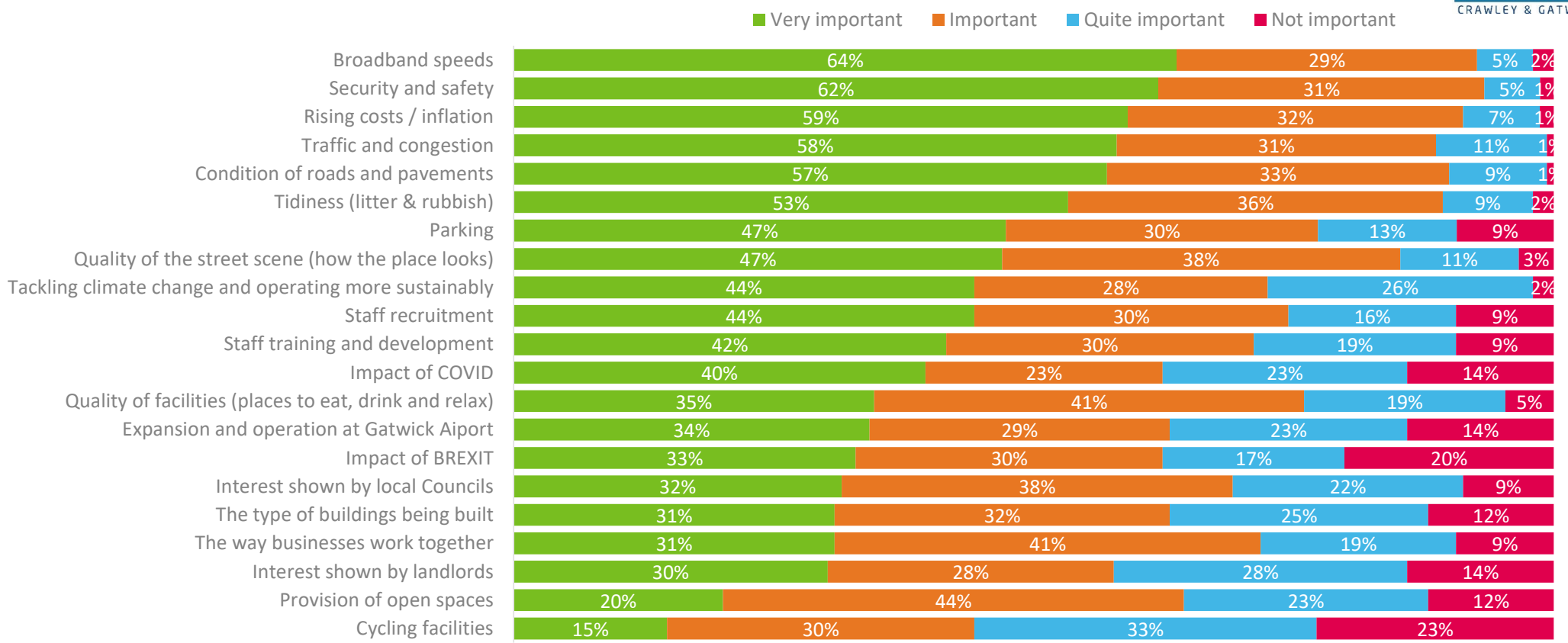


Q. How important are the following issues to your business? Top box (very important % shown)  
Base: 151 respondents taking part in the 2022 survey. Consistent back data not available

# Important issues for businesses: Full distribution



\* Most areas are seen to be important to businesses, with cycling facilities scoring the lowest level of importance.



Q. How important are the following issues to your business? Full distribution, ranked on top box 'very important'  
Base: 151 respondents taking part in the 2022 survey. Consistent back data not available

# Other Important Issues: word cloud / verbatim

\* Parking is the most commonly mentioned issue coming up under 'other issues'.

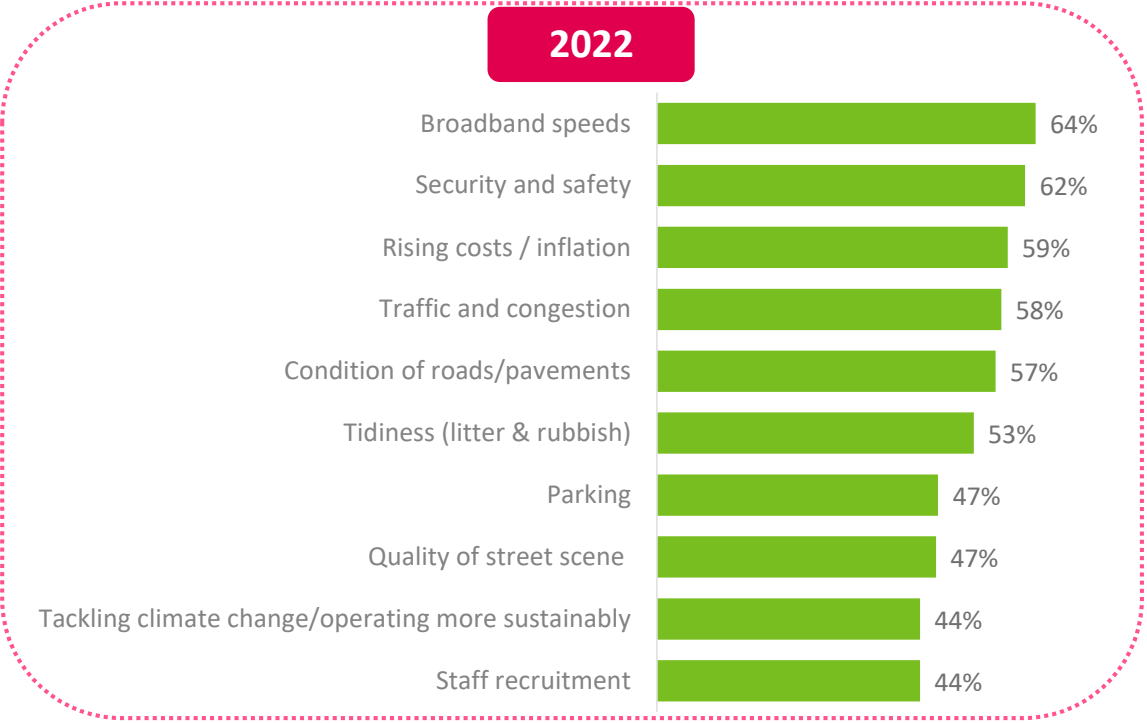


- Sustainability and CO2 (Carbon Neutral) is essential
- Cycle lanes too close to business boundaries
- Facilities availability such as food deliveries, food outlets, meeting room availability, proximity of hotels etc.
- Transport specific issues mainly HGV driver shortage and rising fuel prices
- Lack of parking, made worse by local car garages and airport parking
- The state of the roads / drains are a health & safety hazard
- Tighter security on the Manor Royal
- Main issue we have is parking, but everyone is suffering with that!

Q. Are there any other important issues facing your business?  
Example verbatim – full list of verbatim in the appendix

# Important issues for businesses: Trends

- \* A change in question structure and answer lists makes it difficult to compare 2022 with previous years. However:
  - \* 'Broadband speed' and 'security & safety' have both moved to the fore in 2022, along with 'rising costs/inflation'.
  - \* 'Parking' and 'transport & congestion' remain amongst the key issues for businesses, as does 'tidiness'.



	2021	2020	2019	2018
Faster broadband	10%	26%	15%	29%
Tackle parking, transport & congestion issues	67%	70%	33%	55%
Better facilities / open spaces	39%	23%	26%	36%
Improve the appearance / tidiness	54%	21%	15%	23%
Better security	3%	4%	13%	11%
Excellence in sustainability	48%	47%	26%	23%
Help reduce costs	4%	16%	10%	11%
Build a strong community	33%	63%	44%	29%
Something else	3%	9%	0%	0%

■ Top issue  
■ 2<sup>nd</sup> or 3<sup>rd</sup> most important issue

**Note: Inconsistent question structure and answer codes in 2022 to previous years, so not directly comparable**  
 2022 Q. How important are the following issues to your business? Top box (very important % shown)  
 Previous years: What should Manor Royal improve on? % selecting each answer code show  
 Base: 151 respondents taking part in the 2022 survey. Bases for other years vary

# Important issues for businesses: Change 2022 vs 2016

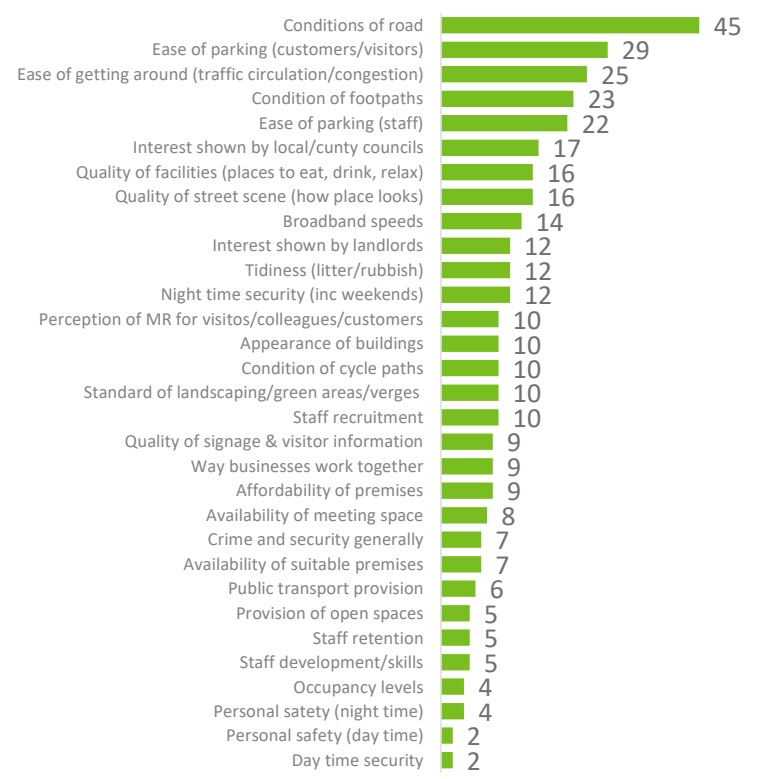
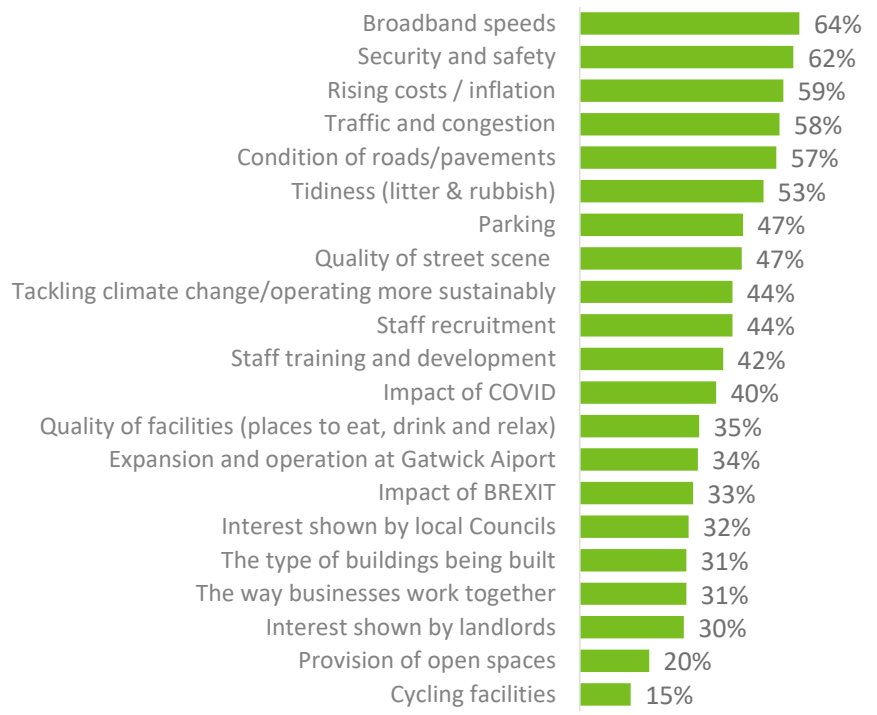
\* Broadband speeds were not amongst the top issues in 2016, however traffic and congestion, parking and condition of roads and pavements were top issues then as well as in 2022.



## 2022

%s not comparable between 2022 and 2016. Look at ranking only

## 2016



**Inconsistent question between 2022 and 2016 - %s not comparable look at ranking only**  
 2022: Q. How important are the following issues to your business? Top box (very important % shown)  
 2016: Q. How important are the following issues to your business? 'Make this a priority %' shown  
 Base: 2022 (151), 2016 (119)

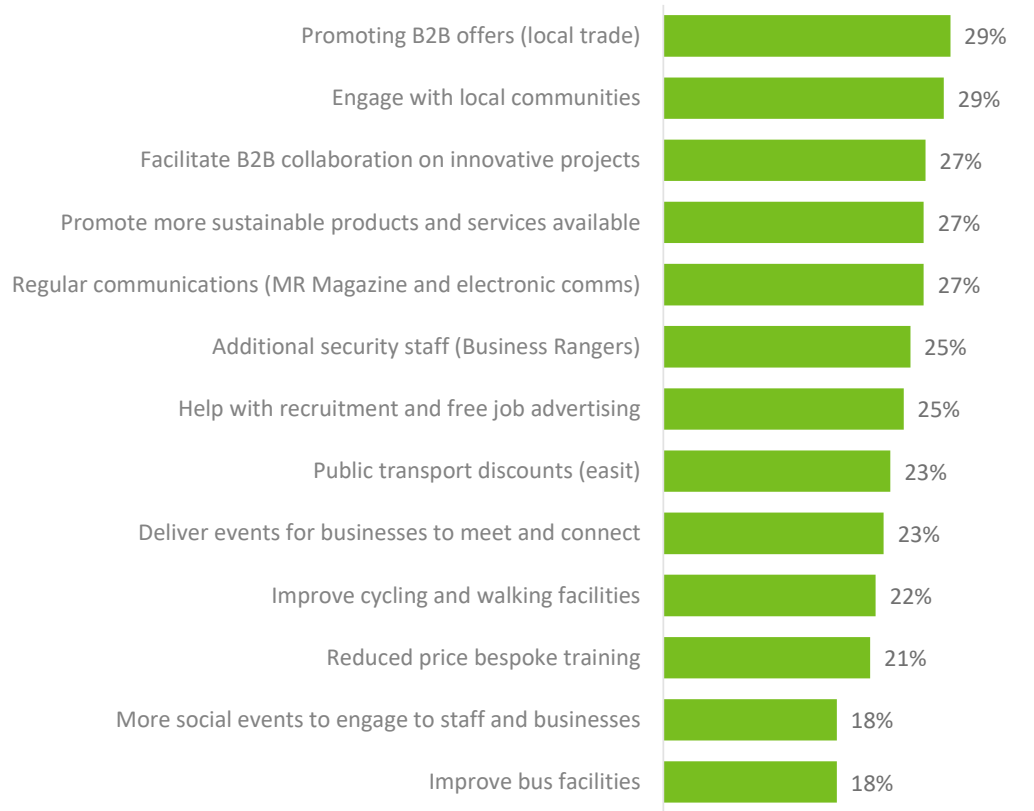
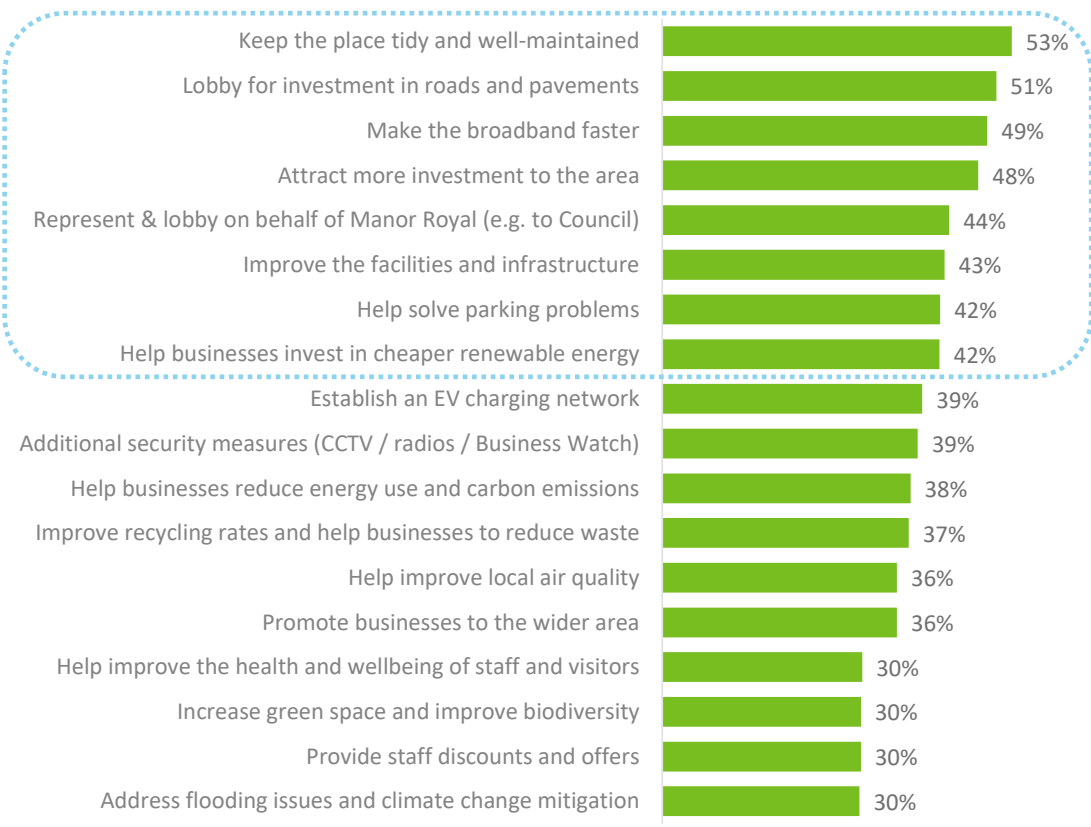


# Important issues for BID to deliver

# Important for BID to deliver: Top box (very important) %



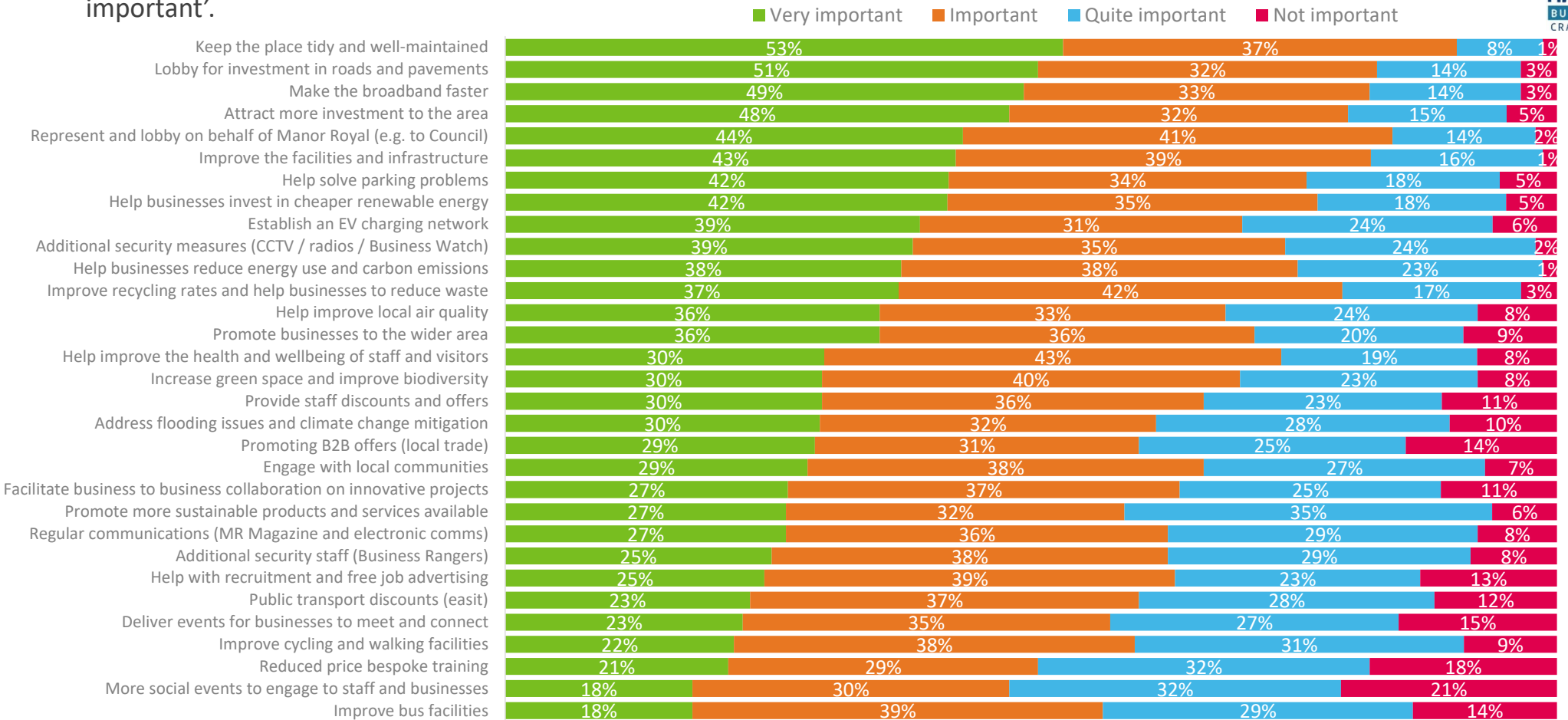
\* The areas most important for BID to deliver are ‘keep the place tidy and well-maintained’, ‘lobby for investment in roads and pavements’, ‘make broadband faster’ and ‘attract more investment in the area’.



Q. Which of the following do you think is important for the BID to deliver? Top box (very important % shown)  
 Base: 151 respondents taking part in the 2022 survey. Consistent back data not available

# Important for BID to deliver: Full distribution

\* Most areas are seen as important to at least some extent. Provision of social events has the highest level of 'not important'.



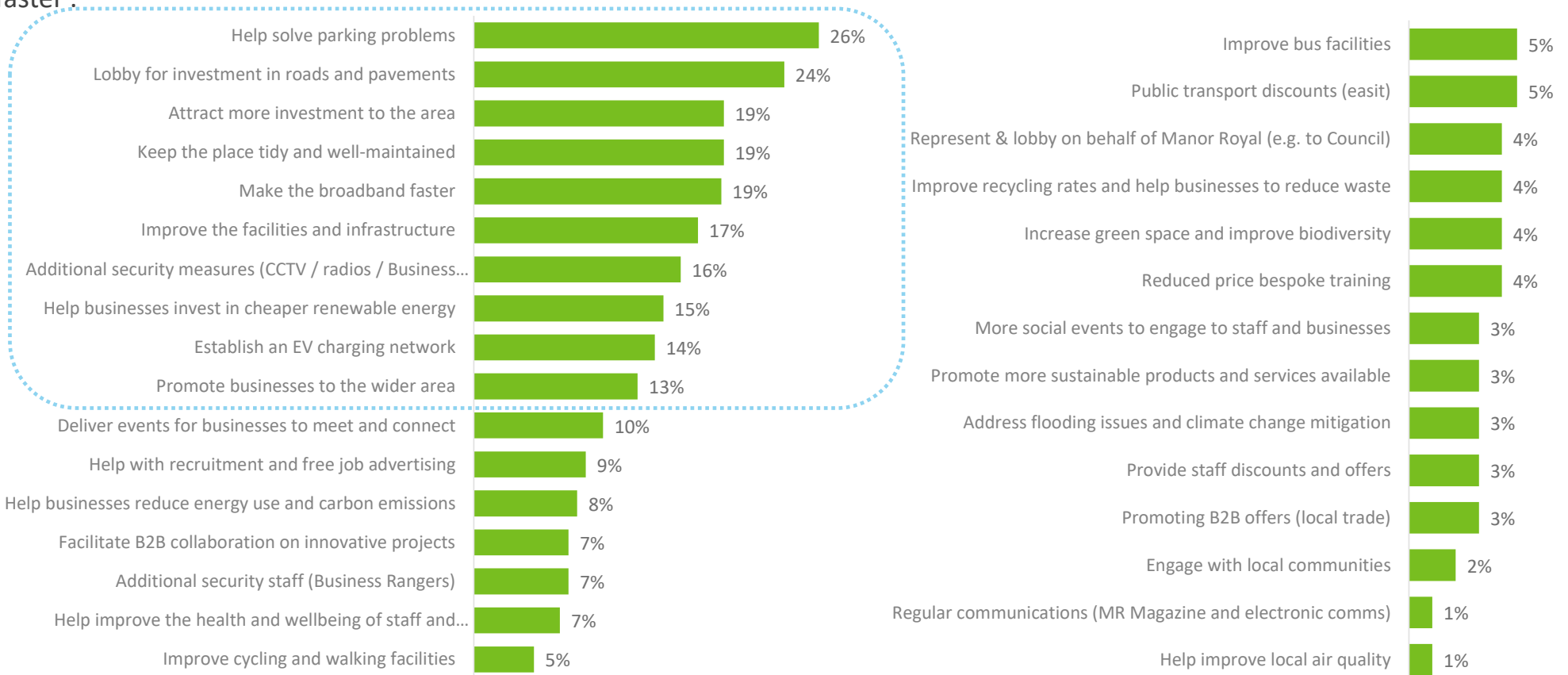
Q. Which of the following do you think is important for the BID to deliver? Full distribution, ranked on top box 'very important'

Base: 151 respondents taking part in the 2022 survey. Consistent back data not available

# Top priorities (Stated) for BID to deliver



- When the areas are ranked, 'to help solve parking problems' and 'lobby for investment in roads and pavements' are the top priorities people are looking for support with from BID.
- This is followed by 'attract more investment to the areas', 'keep place tidy and well-maintained' and 'make broadband faster'.



Q. Of those things the BID could do (Section 4), what are your top 3 priorities for action?  
Base: 151 respondents taking part in the 2022 survey. Consistent back data not available

# Other important issues to deliver: word cloud / verbatim

\* Parking is the most commonly mentioned issue arising spontaneously which businesses would like BID's support on.



Parking is a particular issue

Support small businesses as we make an impact too

More affordable electricity by using solar

A MR recycling point would be great

Pelican/puffin crossing to be installed opposite school

Establishment of an EV Charging infrastructure across the Manor Royal Business district

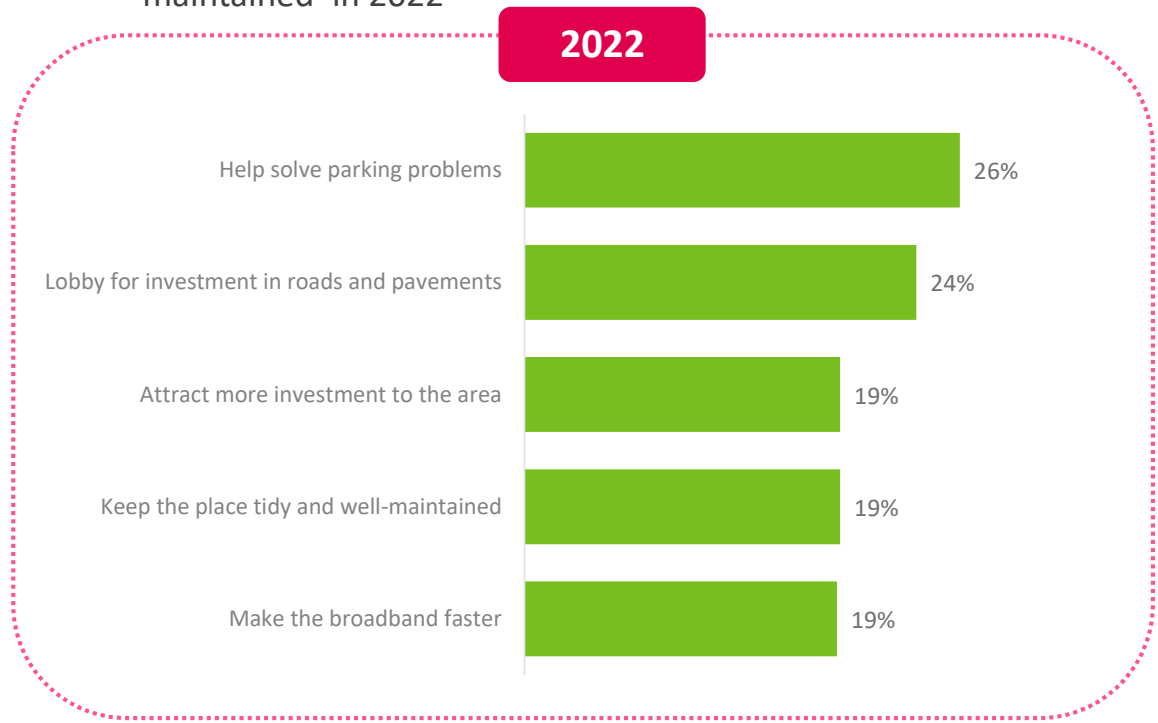
Better street lighting

Q. Is there anything else that is important for the BID to deliver?  
Example verbatim – full list of verbatim in the appendix

# Priority issues for BID to deliver on: Trends



- \* There is no recent back data for the important issues for BID, but there is recent back data on the BID projects which were most valued:
  - \* 'Representing/promoting the area' and 'appearance & facilities' were amongst the most valued of BID projects. This ties in with businesses wanting support with 'attract more investment to the area' and 'keep place tidy and well maintained' in 2022



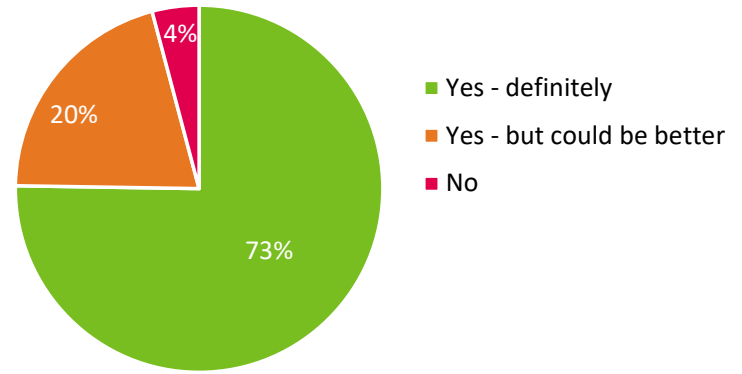
	2021	2020	2019	2018
Dedicated security	12%	24%	15%	14%
Enhanced maintenance	55%	26%	18%	24%
Bespoke training	3%	19%	9%	20%
Jobs Board / recruitment support	13%	31%	3%	0%
Representing & promoting the area	46%	61%	24%	34%
Events	24%	31%	35%	34%
Appearance & facilities	76%	57%	32%	32%
On-site renewable energy generation	30%	22%	26%	17%
Nothing	1%	7%	3%	0%

■ Most valued  
■ 2<sup>nd</sup> or 3<sup>rd</sup> most valued

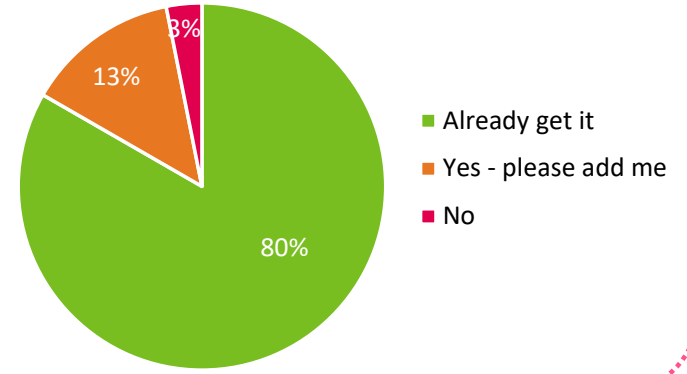
**Note: Inconsistent question structure and answer codes in 2022 to previous years, so not directly comparable**  
 2022 Q. Of those things the BID could do (Section 4), what are your top 3 priorities for action?  
 Previous years: Which BID projects do you most value? % selecting each answer code show  
 Base: 151 respondents taking part in the 2022 survey. Bases for other years vary

# Keeping in touch

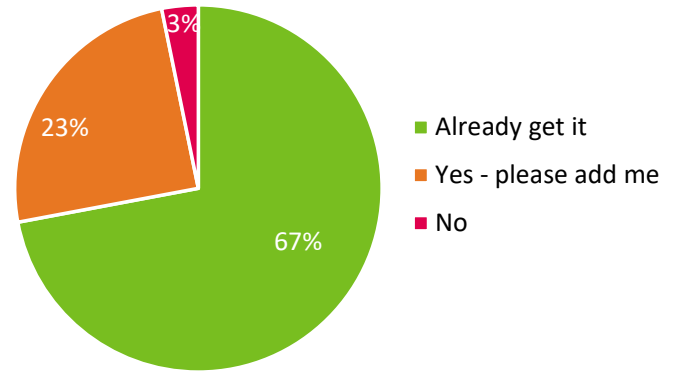
### Whether informed about BID activities



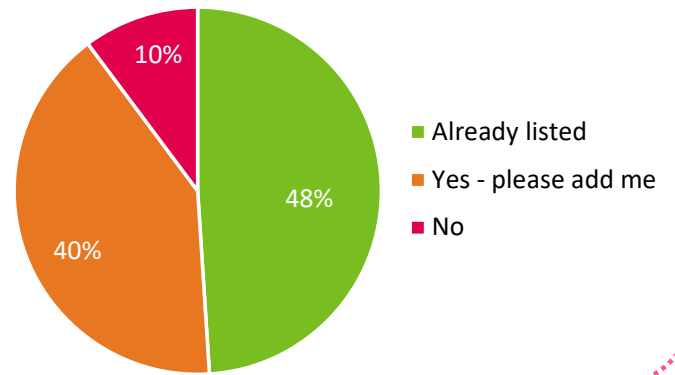
### Whether want Qtrly MR Magazine



### Whether want eNews Bulletin



### Whether want listing on business directory



Base: 151 respondents taking part in the 2022 survey



# Other feedback

# Comments, Ideas, Feedback: word cloud / verbatim



Parking has become a major issue and lack of space is evident. As well as this we are in dire need of electric charging points so this would be something we would definitely push for.

Manor Royal should Lead the Change to a Greener Future through renewable energy and EV Charging.

Covid aside, Manor Royal feels like a thriving business community but improvements and change, such as roads, facilities and infrastructure, does seem to take far too long.

Would have liked to have been able to choose more answers for the 'priorities' question as there was a long list and it's difficult having to only pick 3 of them. Keep up the good work, we are very happy here with the Manor Royal BID!

Would be good to have areas in zones i.e., office blocks together, car zones and factory areas.

Parking provision is further reduced by street traders using spaces for vans and refuse.

More food outlets.

Make Manor Royal a desirable place to work and do business by maintaining the infrastructure and appearance of the buildings, parks and main roads.

Q. Please provide any other comments, ideas or feedback?  
Example verbatim – full list of verbatim in the appendix

# Good feedback for the BID



I think the BID team do an amazing job and I love being a part of Manor Royal. Since the BID has been going the sense of community has grown and the area has improved.

You are doing an excellent job. The profile of Manor Royal is so much higher than pre-BID. Keep up the great work and we look forward to working with you to take it up another level (biggest hydrogen bus hub in Europe on Manor Royal shortly, I think!)

We love all that the BID already does, so this is really hard to improve on what a great job you're doing. We've only been in the area 2 years and feel a part of the business community.

You guys do a brilliant job! We are very grateful. Thank you!

Keep up the good work

I think you are all doing a truly wonderful job !

I think the Manor Royal BID team are doing a great job. Keep up all the good work, it's made such a difference.

I have not really been involved with the BID for long but what I have seen / learnt so far it seems to do what it needs to do. I cannot wait to increase our involvement with the BID over the coming years.

Keep up the good work

I had not heard of BID until one of our neighbours let me know. S was great and introduced me to D, they are both a brilliant help and are crucial to the Manor Royal business community. I am really thankful to them both for their help.

I personally think you have done a fantastic job over the years and have delivered great improvements to Manor Royal.

Q. Please provide any other comments, ideas or feedback?  
Example verbatim – full list of verbatim in the appendix

# APPENDIX

# Full list of verbatim: 'Other issues'

- An issue with the upcoming parking proposal as well as illegal parking. The state of the roads / drains are a health & safety hazard.
- "BREXIT as above. Cannot get relatively low value products from EU countries into Crawley. Shippers do not want to come into UK, cost even of pallet moving is stupid then you cannot get anyone to ship them. Sorry but it's above tick box but makes me angry as cannot get stock! P.S UK do NOT manufacture these products, they are Chinese, Indian or Thai manufactured. Getting more (we have some) Manor Royal/local business to use our services. This year seen vans from Leeds, Hull, London... All on our estate!"
- Changing regulation; increasing red tape.
- Charging points being accessible and buildings with capacity to have high number of charging points installed
- Cycle lanes too close to business boundaries - vehicle HGV's exit and entrances - nothing to warn of possible dangers - slow speed approach required - same for bus lane usage - nothing to indicate turning (slow) vehicles across lanes - "caution signs" & "speed reduce" signage required. Additional speed cameras - both sides of Fleming Way.
- electric charging points in car park at county oak and acorn would be important
- Employees would love to be able to cycle to work but we have no showers here in our old building. A gym inc showers on the estate free for all employees would be awesome (obviously subsidised by the companies involved). Wishful thinking maybe.
- Empty buildings make area look unloved, better for our clients to come to an area where clean and tidy and buildings look lived in. Better additional parking, there are no car parks on Manor Royal and offices only allocate a certain number depending on space you have - where can staff and visitors park?
- Energy costs, Shortages of micro chips
- Facilities availability such as food deliveries, food outlets, meeting room availability, proximity of hotels etc.
- Harsh bumps on way into Forgewood Estate
- Hybrid working - technology availability / broadband. Larger conference / meeting spaces to accommodate hybrid meetings (tech and facilities) Sustainability and inclusivity f the local area
- I know it is good for the area but because it looks better landlord asked for 50% more rent.
- I think the electricity charges on the estate are too high. I think BID should research a solar supplier and roll out a deal for the estate
- It's very hard being a all business as non of the larger companies use us, I would like to see more affordable offices for small businesses, not office let companies taking advantage of the small companies, Small business make an impact too
- Lack of availability of medium sized units i.e. 6000-9000sq feet meaning we have to lease 2 units - one in Royce Rd & one in Columbia works. Been looking for years for one unit
- Lack of parking, made worse by local car garages and airport parking
- Main issue we have is parking, but everyone is suffering with that!
- None which aren't being felt by others within the District - rising prices being the main challenge. Transport specific issues mainly HGV driver shortage and rising fuel prices.
- Parking and other local businesses using the public highway for storage and their own business use.
- Parking for expanding team and patients. Working more with Manor Royal businesses - collaboration is key
- Parking is probably our greatest concern and the general attractiveness of the area as a good place to work.
- Planning permission
- rising costs
- Roadworks seems never ending. Road conditions poor. Highway parking out of control and creating serious risks.
- Signage
- Street trading across Manor Royal is poorly managed by Crawley Borough Council and over subscribed creating a poorly balanced hospitality sector as these traders evade significant costs associated with operating in Major Royal.
- Sustainability and CO2 (Carbon Neutral) is essential for our customers, who are global companies and signed up to COP26. Landlords are not supportive and we need to understand how the council can support businesses going forward.
- The above choices are comprehensive and cover the main topics I would have considered
- The unsightly appearance and flooding of Maxwell Way.
- Utility costs, vehicle costs/supply, stability of Gatwick airport, quality of road network in and around Gatwick/Crawley.
- We are concerned that they are looking at making the road one way outside our building, which means that we will not be able to park on the street outside, which is where a majority of our staff park.
- We are very concerned with the amount of litter that is going to be created by the new McDonalds and Starbucks going in across the street.
- Yes, tighter security on the Manor Royal.

# Full list of verbatim: 'Other things for BID to deliver'

- A MR recycling point would be great
- Again support small business as we make a big impact too
- Better street lighting
- Establishment of an EV Charging infrastructure across the Manor Royal Business district.
- In Maxwell Way, and I'm sure other areas, opposite Maxwell Way sandwich van is a grass verge that is often flooded, muddy, looks awful due to vans parking. Needs bollards and a tidy up.
- More affordable electricity by using solar. A focus on data security on the estate
- Parking is a particular issue where Gatwick customers and staff use spaces as Gatwick parking provision has been reduced or costs increased. This removes parking for Major Royal staff and customers.
- Parking is important assuming people start returning to the area
- "Pelican/puffin crossing to be installed opposite school to avoid deaths of children/teachers (pelican/puffin will allow free flow of traffic compared to a zebra which will always cause delays. McDonald's. "
- Road's a mess. Holes everywhere! Too many cars parked on roads around by TIP.
- The above covers the major opportunities

# Full list of verbatim: 'Other comments and feedback'

- As mentioned before ... I think you are all doing a truly wonderful job !
- attract potential employees to the area and businesses
- Condition of roads needs sorting!
- Continue with the authentic existing partnerships for the benefit of Crawley County community to ensure a safe and welcoming environment which can grow year to year
- Covid aside, Manor Royal feels like a thriving business community but improvements and change, such as roads, facilities and infrastructure, does seem to take far too long.
- I had not heard of BID until one of our neighbours let me know. Steve was great and introduced me to Danny, they are both a brilliant help and are crucial to the Manor Royal business community. I am really thankful to them both for their help.
- I have not really been involved with the BID for long but what I have seen / learnt so far it seems to do what it needs to do. I cannot wait to increase the involvement of DMS with the BID over the coming years.
- I often work as so many others when taking a break from the office and believe that the pavements, cycleways and green spaces could be connected better and lit better especially during the winter. If walking routes could be created and connected through Manor Royal it would connect the community and the different food outlets
- I personally think you have done a fantastic job over the years and have delivered great improvements to Manor Royal.
- I think the BID team do an amazing job and I love being a part of Manor Royal. Since the BID has been going the sense of community has grown and the area has improved.
- I think the Manor Royal BID team are doing a great job. Keep up all the good work, its make such a difference.
- In our area, with all the traffic due to arrive to serve the masses of new logistics buildings, along narrow roads with cars parked on both sides, how are we going to manage to ease parking and improve traffic flow?
- In our local residential communities we have groups where we can ask for help e.g. recommended trades, questions about where to go for things. Could something be considered along these lines without too much intervention needed at moderator level?
- Keep up the good work
- Make Manor Royal a desirable place to work and do business by maintaining the infrastructure and appearance of the buildings, parks and main roads
- Manor Royal should Lead the Charge to a Greener Future through renewable energy and EV Charging.
- More options to promote new products , ideas that would help facilitate achieving the three main improvement ideas
- Nothing to add, hard to comment based on COVID and the impact this has had on the local economy. A tough time for us at the moment!
- On a personal note, I am wholly against the back door approach of the Gatwick expansion. The comments and promises made are without foundation and mis-leading
- Other = attract more skilled labour and sub contractors
- "Other = improving ALL areas of Manor Royal. The re-generation of Manor Royal is fantastic, however the main thing we have used is the training, If there are other discounts we can offer our employees through this, that would be great. Cross company discounts of services would be good too. "
- Other = more food outlets
- Other rank 3 = one way system
- Our landlord shows little regard for the interests of the tenants and properties around us are rapidly emptying. Does he have a hidden strategy? DPD and W&H flood the streets with vehicles that they do not have space for overnight or even by day.
- Parking has become a major issue and lack of space is evident. As well as this we are in dire need of electric charging points so this would be something we would definitely pushing for.
- Parking provision is further reduced by street traders using spaces for vans and refuse
- Please support small business and affordable offices to rent
- Safety concerns - cyclists speed across entrances! Across busy HGV routes in/out of businesses, speed of bus lane: needs slowing down when approaching main sites entrances/exits
- States at the front page FREE security radios but we don't have one
- Suggest looking into a park and ride scheme for the school to help with the congestion it causes in the morning.
- The idea of permit parking needs to be reviewed to increase more parking spaces in the local area and reduce businesses leaving vehicles or airport parking for weeks on end.
- The industrial estate has an eclectic range of small business from varied industries. Establish engagement with big business, providing is the step up to promote ourselves to them
- The roads and pavements, including how cars are parked, are what people see when they come and visit and lot of them are embarrassing. First impressions are important and the surrounding areas of a business have an impact on how they're perceived.
- Traffic
- We love all that the BID already does, so this is really hard to improve on what a great job you're doing. We've only been in the area 2 years and feel a part of the business community.
- Would be good to have areas in zones i.e. office blocks together, car zones and factory areas.
- Would have liked to have been able to choose more answers for the 'priorities' question as there was a long list and it' difficult having to only pick 3 of them. Keep up the good work, we are very happy here with the Manor Royal BID!
- You are doing an excellent job. The profile of Manor Royal is so much higher then pre-BID. Keep up the great work and we look forward to working with you to take it up another level (biggest hydrogen bus hub in Europe on Manor Royal shortly, I think!
- You guys do a brilliant job! We are very grateful. thank you!

# Your PPL Insights Team



**Yvonne Taylor**

Managing Director

Overall responsibility for the project

Email: [yvonne.taylor@pplinsights.com](mailto:yvonne.taylor@pplinsights.com)

Phone: 01293 558956



**Helen Goode**

Associate Director

Day-to-day project manager

Email: [helen.goode@pplinsights.com](mailto:helen.goode@pplinsights.com)

Phone: 01293 558951



**Lottie Hayward-Williams**

Research Executive

Project Support

Email: [Lottie.Hayward-Williams@pplinsights.com](mailto:Lottie.Hayward-Williams@pplinsights.com)

Phone: 01293 558964



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