

No Magic Wand for Wandsworth?

A Brexit Audit in the London Borough of Wandsworth



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1 Introduction

Approaching twenty months on from the UK Referendum on leaving the European Union, and almost twelve months after the notification to the EU under Article 50, it is striking how much uncertainty remains. European Movement in Wandsworth is a non-party political group of residents keen to explore and inform the continuing debate. We have conducted this audit to present a snapshot of how the local community is reacting to and preparing for the potential UK departure, now scheduled for March 2019.

Amongst our key findings:

- **61% of businesses and organisations that we surveyed were pessimistic about their prospects after Brexit.**
- **Over two thirds, or 67%, of respondents forecast that they are less likely to hire new staff.**
- **63% stated that they are less likely to make new investments as a result of Brexit**
- **Taken in isolation, over 80% of the hospitality sector businesses that we surveyed are pessimistic, and state that they are less likely to make new investments**
- **Workers from the EU27 countries (i.e. the present EU except for the UK) make up 25% of the workforce, including 30% in the hospitality sector.**
- **16% of all workers at the St. George's Hospital Trust are from the EU27 countries (NHS data), with a particularly large number working in mental health support.**
- **The greater proportion of anecdotal evidence from respondents was negative about the prospects for Brexit. They cited employment problems, price rises and loss of customers as significant causes for concern.**

The limited time and resources available to a volunteer group have obviously placed a limit on the scope of the study. Also, we make no forward projections in this report. However, we do hope that this report provides an informative addition to the debate.

2 Context of report

There have been several previously published reports of research projects into the effects of Brexit at various levels - national, regional and local - and of various interest groups such as local government leaders and businesses.

At national level, the government's own [impact studies by sector and region](#), which had not previously been officially released despite heated debate, were published by Parliament's Brexit committee as we wrote this report in early March 2018.

Also in March 2018, the Government Committee for Departure from the EU [published the findings](#) of an official EU Exit Analysis conducted by Government economists. That study predicted a net negative impact on growth of 8% for the country as a whole (depending on the form of the final exit agreement), rising to as high as 16% for the North-East of England, and 4% for London. None of the scenarios studied in the report predicted a net positive impact on growth, compared to the scenario of remaining in the EU. Notably, the Government economists were criticised by members of the Government.

As regards local government, according to a press report a countrywide survey by the New Local Government Network of all council leaders and local authority chief executives in county, district, unitary and metropolitan and London borough councils found that 61% believed Brexit would have a negative or very negative impact on their regions, 12% that believed it would have a positive effect, and 26% felt the impact would be neutral. ([Helm, T. 2018](#))

At regional level, in October 2016, research was commissioned involving interviews with 26 businesses in Cornwall regarding their early reactions to the vote ([Rush, 2016](#)). In October 2017 a more wide-ranging survey of confidence of local businesses in the West Midlands was conducted by the BBC Sunday Politics Programme ([Burns, 2017](#)).

Within London, in January 2018 the Mayor of London published [research](#) that had been commissioned to assess the impact of Brexit across the Capital, placed in the context of the UK economy overall. The study involved the application of analytical techniques to derive forward looking projections and warned that a "hard" Brexit could lead to a decade of lost growth and employment.

After our survey was launched in January 2018, Wandsworth Council (together with the neighbouring borough of Richmond) announced that it has commissioned an agency to conduct a [telephone survey](#) to obtain views of businesses on their plans "for investment, recruitment, meeting the challenges of Brexit and their overall business confidence".

Mention should also be made of a qualitative review of local businesses in an area of London neighbouring Wandsworth (Elephant and Castle) published as four "stories" in 2016 ([Listen Local project, 2016](#)).

However, even in London there are likely to be broad variations, and furthermore there is a difference between the approach of overarching modelling studies and that of the kind of personal research that can only be conducted at local level through survey.

Whilst there is an obvious need for further study of the positives and negatives at a national scale, so is there a requirement for a better understanding of the impact at a personal and community level - communities provide the backdrop to our day-to-day lives. How do the local businesses and organisations with which we interact daily view their role under the new conditions soon to be imposed?

While we welcome Wandsworth council's research, we'd like to emphasise that our Brexit Audit is unique in that we believe it is the first to be conducted by a group of local residents as a voluntary initiative, in order to better describe the concerns, hopes and ambitions of the Wandsworth community.

3 Methodology

This survey was conducted in January and February 2018 amongst businesses and organisations operating in Wandsworth. Owners and managers were invited to take a short survey online and answer nine questions relating to how their businesses were faring in the run up to Brexit. A list of the questions is provided in Appendix B.

Volunteers across the borough called on local offices, shops, bars and restaurants inviting them to participate in the survey. Cards were left for managers with details of how to access the survey online. Respondents were assured of complete anonymity when the results were published. For this reason, the greater part of respondents in our survey are the public-facing businesses that we all encounter and interact with from day in our community.

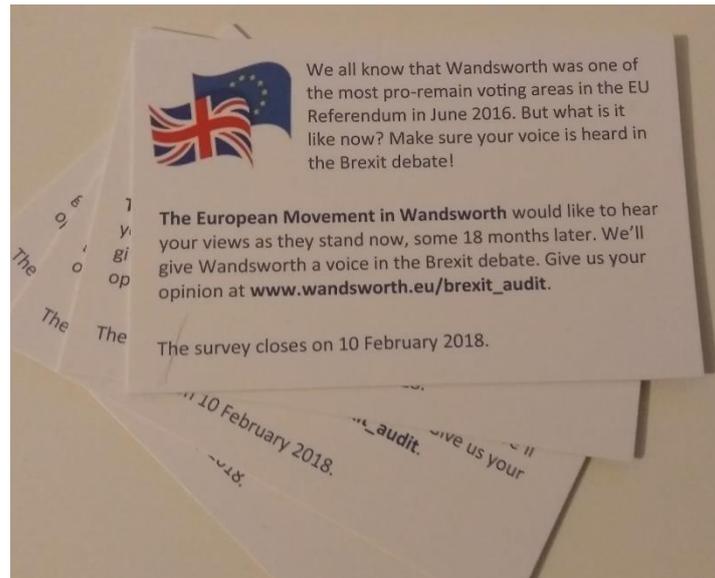


Figure 1: cards were distributed to businesses explaining the survey

The survey was also promoted by the Wandsworth Chamber of Commerce, who contacted their members by e-mail and invited them to participate.

The organisers of this audit acknowledge that it is small in scale and only a snapshot of the reality we aim to describe. Nevertheless it represents - as far as we know - the only example of fieldwork that has been done in this way and could serve as a pilot for similar audits across the country.

4 Survey Findings in Wandsworth

4.1 Sectors surveyed

As shown in Figure 2, 11% of the 87 respondents in our survey could be broadly categorised as belonging to the hospitality sector, 20% to retail, 32% to services and 37% were categorised as 'other' (the range of organisations included education, media, construction and social care).

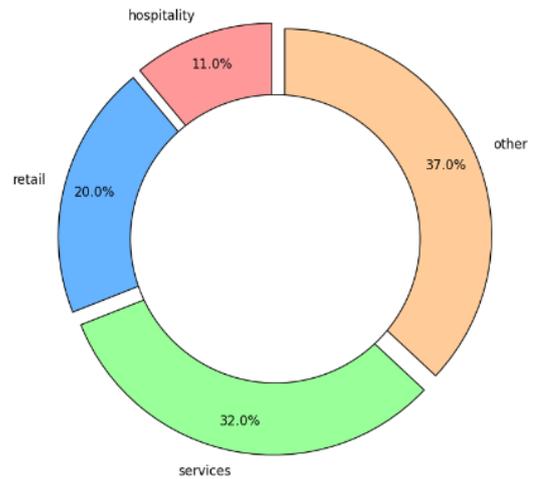


Figure 2: Sectors as categorised in our survey

4.2 Confidence in Wandsworth after Brexit

4.2.1 Confidence overall

We first report the survey findings across all business sectors. Figure 2 shows the distribution of responses to three key questions in the survey:

- i) On a scale from 1 (pessimistic) to 6 (optimistic), how do you perceive the prospects after Brexit of your organisation/business?
- ii) Based on what is known so far about the Brexit plans, how likely are you to hire staff for your organisation? Scale from 1 (less likely) to 6 (more likely)
- iii) Based on what is known so far about the Brexit plans are you more or less likely to invest in your organisation/business? Scale from 1 (less likely) to 6 (more likely)

Responses from 1 to 3 (pessimistic) are coloured in shades of blue, according to the key. Response from 4 to 6 (optimistic) are colour in shades of yellow. The response to each of the three questions demonstrates an overall pessimistic attitude with regards to future outlook. Taken overall 61% of businesses and organisations that we surveyed were pessimistic about their prospects after Brexit. Over two thirds, or 67%, forecast that they were less likely to hire new staff. 63% stated that they were less likely to make new investments as a result of Brexit.

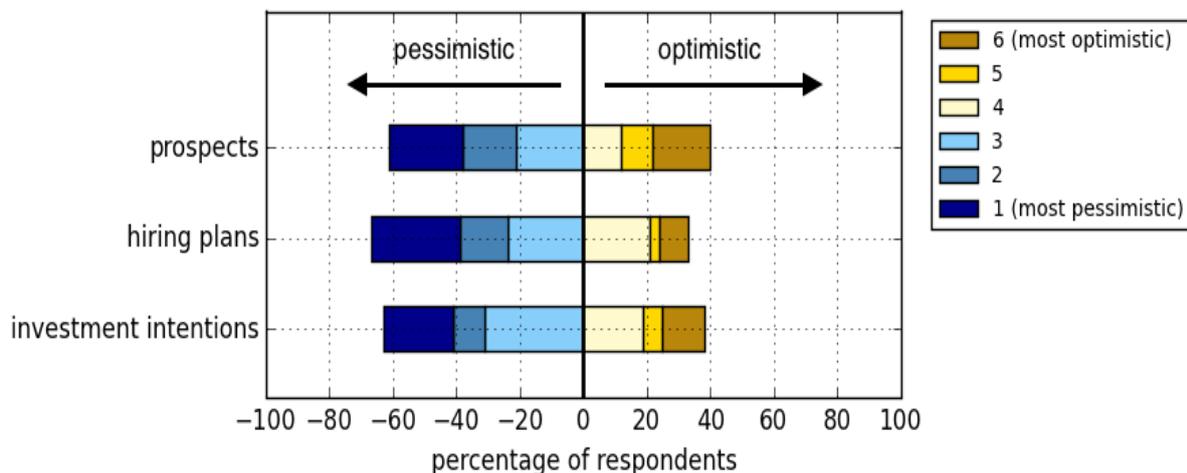


Figure 3: results from overall analysis

4.2.1 Confidence by sector in Wandsworth

These findings were further broken down by sector, based on the character of businesses and organisations surveyed, as categorised in Figure 2, above.

What is notable from this further analysis is the sentiment in the hospitality industry, for which the response rate was particularly negative with regards to future prospects and to investment intentions.

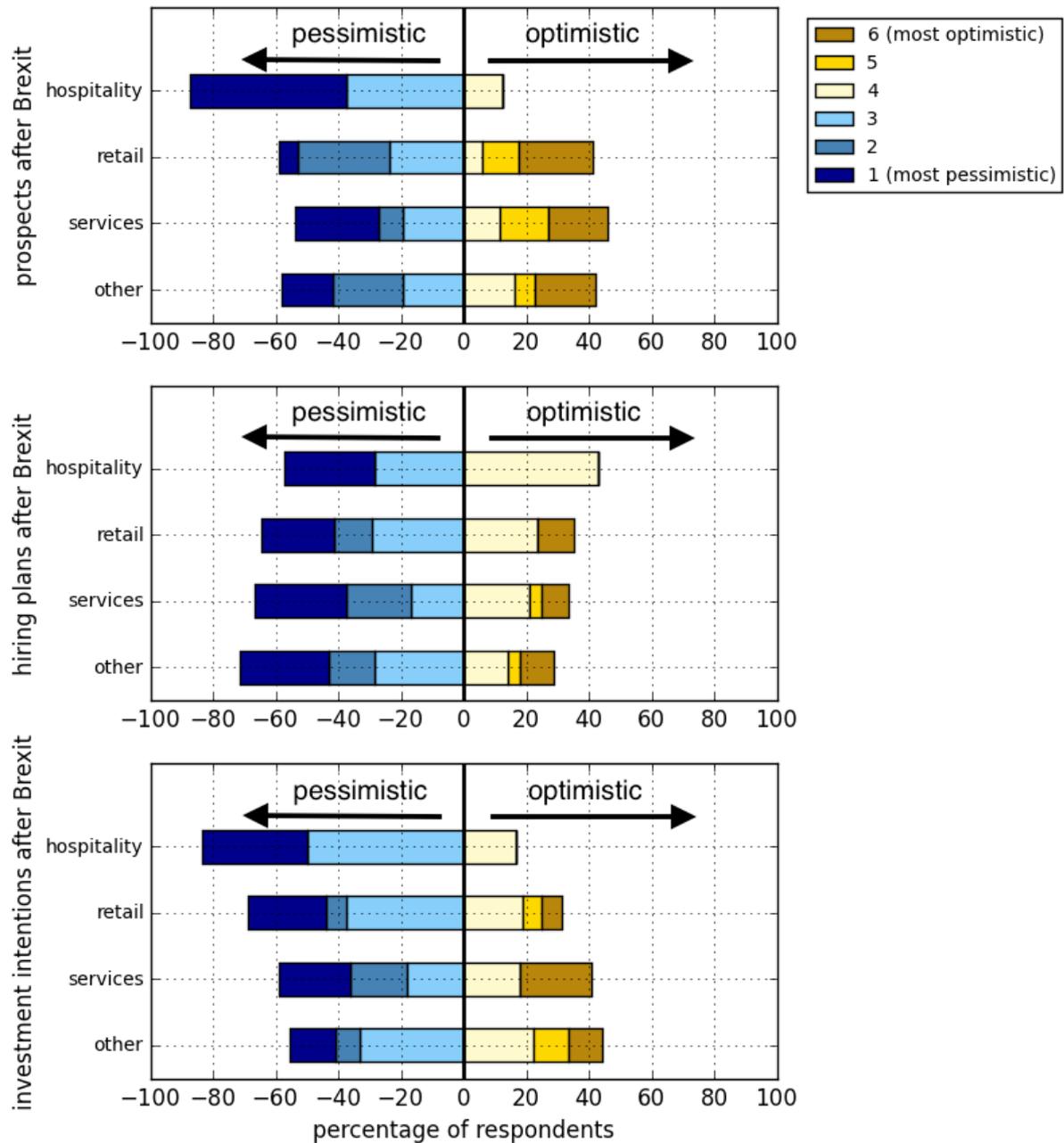


Figure 4: analysis by sector

4.3 Estimates of EU workers by sector in Wandsworth

A further question concerned expectations for trade and profit expectations for those businesses and organisations which indicated that they export to or import from the EU27.

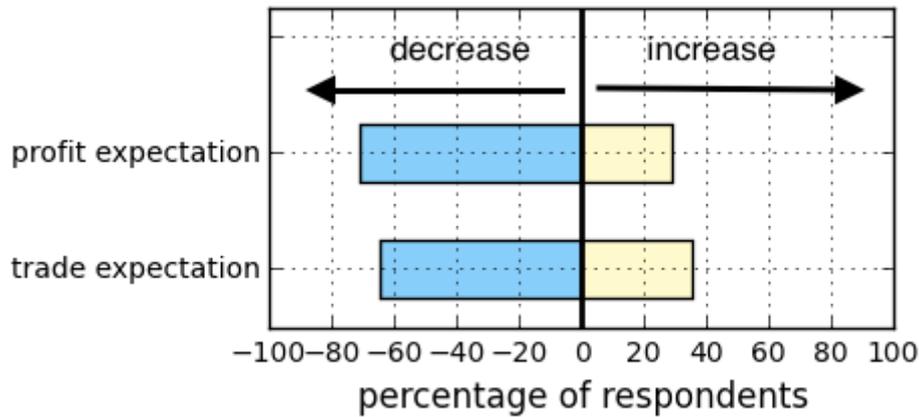


Figure 5: results from overall analysis

As shown in Figure 5, we found a net negative impact of 65% in both expectations for future trade, and of 70% in expectations for future profit, amongst those that said they traded with the other nations of the EU.

4.4 Estimates of EU27 workers by sector in Wandsworth

Survey respondents were asked to provide the number of workers in their business or organisation, and to estimate the number of EU27 workers as a percentage of that total. These two figures were used to calculate an approximation of the percentage of EU27 workers per sector in our survey. This should be taken as an estimate appropriate to our survey respondents rather than a definitive figure, but gives an idea of the employees particularly vulnerable to the effects of Brexit in each sector. Notably, the hospitality industry had the largest percentage. We also used [data](#) from the House of Commons Library to provide a figure for healthcare.

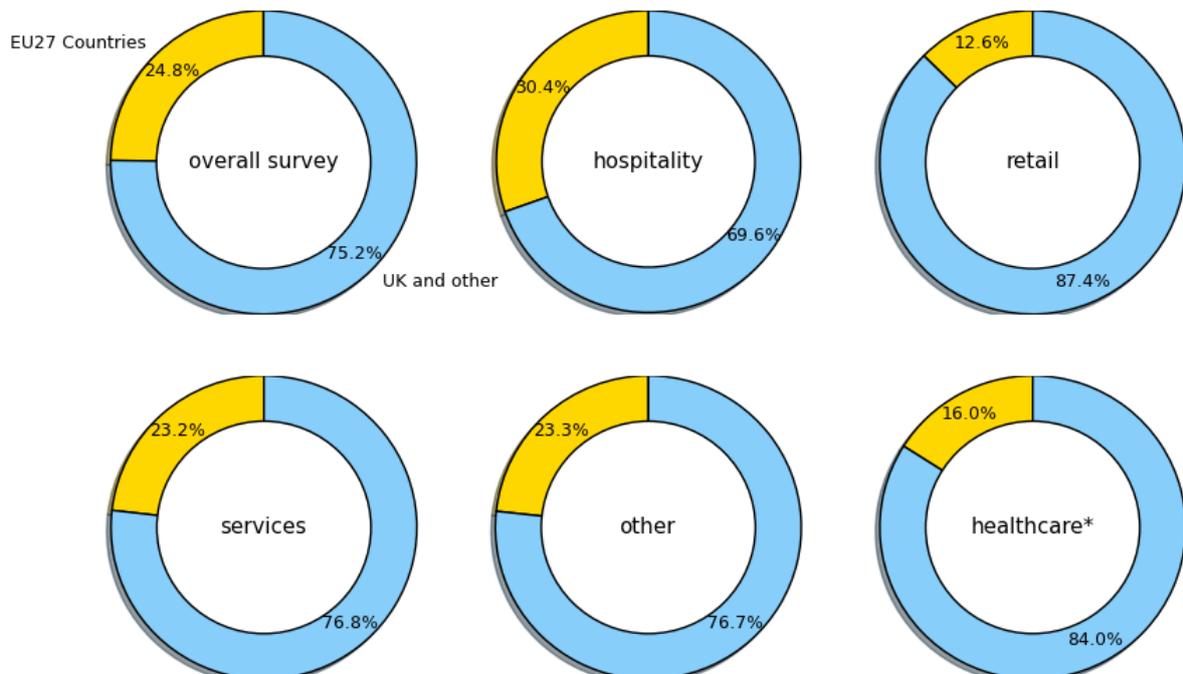


Figure 6: EU27 workers by sector, shown in yellow, as a percentage of workers from UK and from other countries, shown in blue (based on survey answers, with the exception of healthcare, which uses the figure provided by the House of Commons Library (2018) for St. George's University Hospitals NHS Trust)

4.4 Anecdotal evidence

In addition to the questions in Appendix B, at the end of the survey, respondents had the opportunity to make comments unprompted by any questions. This produced a number of observations which are reproduced in Appendix A below without any editing on our part (except to categorise the comments as explained below).

The value of these comments must not be over-rated. Only twenty-seven respondents actually made comments at all and they vary in length, detail and depth of feeling. This is why the only analysis we have made is to class them as broadly positive about Brexit (five respondents), broadly negative about Brexit (nineteen respondents), or having mixed feelings (three respondents).

The comments of four of the five positive respondents were to the effect that they expected greater trade opportunities, whereas the fifth was an expression of hope that Brexit would improve business after the recession. For example, the following respondent hoped that the promised new trade deals would help their organisation:

"I think that leaving the EU is good for the country - a positive move. All our goods are made in Britain which customers seem to want especially from US, Hong Kong, Dubai, Russia and the also the EU. Leaving the EU will be better for trade deals further afield."

The negative comments mentioned employment problems (staff already lost or recruitment difficulties) in seven cases; price rises in four cases; loss of customers (including exports) in five cases; and one case of a business having already closed down and two more having to move abroad. The following are some typical responses:

"I had a native French speaker working for me to assist in business in Morocco and to solicit new client publishers from France - she has left because she no longer feels settled here - she will be hard to replace"

"I am owner operator in my traditional painting and decorating specialist service and from January 2018 I got letters from all UK major supplier saying that all paint/materials/sundries are increasing from 8-19% depending brand, so far from 2 year I didn't increase any labour charges but I will need to add minimum 8-12% of cost due to not taking hit on me and my business.."

"In our sector, we depend heavily on EU employees, we don't know what we'll do or where we'd be when if workers from the EU stop coming, or start leaving or both! British workers are not interested in the hospitality industry."

Please refer to Appendix A of this document to read all of the comments submitted, positive and negative and mixed.

5 Discussion

5.1 Results in context of industries overall

Wandsworth Council provide detailed recent figures regarding the categories of industry in the borough, that we quote here to put our results in context. Table 1, below, provides the percentages of businesses registered with the council.

Table 1 - percentage of VAT/PAYE based enterprises by Broad Industry Group ([Wandsworth Council, 2016](#))

Broad Industry Group	Percentage in Wandsworth
Professional, scientific & technical	29.6%
Information & communications	14.4%
Business admin. & support services	9.7%
Arts, entertainment, recreation & other services	8.6%
Construction	6.6%
Retail	6.5%
Health	5%
Accommodation & food services	4.5%
Other	15.1%

Table 2 is an estimate of the percentage of people employed across the different industries within the borough (n.b. less than 5% is combined to the 'other' category)

Table 2 - percentage employed per industry sector in Wandsworth Borough ([Wandsworth Council, 2016](#))

UK SIC 2007 Broad Industry Group	Percentage in Wandsworth
Health	17.4%
Retail	11.0%
Professional, scientific & technical	8.7%
Education	10.1%
Accommodation and food services	7.9%
Other	44.8%

At over 20% of respondents, retail is over-represented in our survey, whereas the health and educational sectors are definitively under-represented. This is not surprising given that our volunteers were most easily able to talk to public-facing businesses, and that retail, services and hospitality are likely to be comparatively well represented on the Chamber of Commerce list. So, with the aid of credible information in the public domain, we here explore the implications for other sectors that are active in Wandsworth.

5.1.1 The Health Sector in Wandsworth

A large employer in the borough is St. George's Hospital. 16% of St. George's University NHS staff come from the EU27 countries - the fourth highest percentage in the country ([House of Commons Library, 2018](#)). However, there are question marks over the further willingness of EU27 staff to continue to support the health service in this way, following the Brexit vote. In the first year since June 2016, EU27 nurse applicants fell by 96% at a national level ([Triggle, 2017](#)). Mental health support in the borough is a particular concern, given the high numbers of EU27 staff working in that department, as revealed by John Hughes, South West London and St George's Mental Health NHS Trust, in response to a freedom of information request ([Fol 2017](#)).

5.1.2 The Education Sector in Wandsworth

A large employer in the borough is Roehampton University. 4% of students at Roehampton come from EU countries other than the UK ([Complete University Guide, 2018](#)), contributing to a valued international mix. There are no public statistics for staff at the university, but it is known that at a national level 17.3% of academic and 6.4% of non-

academic staff come from EU27 countries ([HESA, 2017](#)) - a figure that is likely to be higher for London based institutions if the national distribution follows trends of other employment sectors.

Paul O' Prey, Roehampton University Vice-Chancellor, has [commented \(2016\)](#) that the success of the UK sector has been based on its ability to attract the best students and the best staff, and feels that the possible lack of access to talent is the biggest threat that Brexit holds for the sector in the long-term.

5.2 Results in context of Greater London, and nationally

As discussed in Section 2, the study commissioned by the [Mayor of London \(2018\)](#) conducts a forward projection on the different Brexit scenarios. Notably, it discusses several sectors of strategic importance to London that employ a high percentage of EEA workers in the Capital (n.b. EEA refers to the EU27 countries plus Iceland, Norway, Switzerland and various microstates).

Table 3 - Percentage of EEA workers within each sector, in London (sourced from [Mayor of London report, 2018](#))

Industry Group	Percentage of EEA employees in sector for London
Hospitality	32%
Construction	25%
Creative/Cultural	9%
Financial	12%

Although there are no specific figures for retail or specifically for services in the Mayor of London study, it is notable that the 32% employed in the hospitality sector is close to the 30% that work in the sector in Wandsworth.

5.3 Recommendations for future work/surveys

While this survey represents some significant local field work, there are other bodies conducting surveys on the effect of Brexit on various industry sectors. For example, the 'Best for Britain' group has recently published information on the effect of a 'hard' Brexit on the aviation and automobile industries ([Best for Britain, 2017](#)).

In February 2018, the Wandsworth Business Forum hosted a special panel on the effect of Brexit on local businesses. It is clear that more qualitative research along the lines of this report is urgently needed, not just in Wandsworth but across the country ([Wandsworth Council, 2018b](#)).

6 Conclusions

It is widely known that Wandsworth was one of the boroughs which voted most emphatically in the referendum in June 2016 to remain in the EU. We - the European Movement in Wandsworth - wanted to investigate if this was still reflected in the community nearly two years later as the consequences of the referendum approach. The results of our Brexit Audit show a very distinct pattern of pessimism among businesses and others, which is also reflected in similar reports referred to in this document.

This may be a small study conducted by volunteers over a short period of time in a single borough of South West London, but it reveals the fears and uncertainty which at least two thirds of business owners and others struggle with in their everyday life.

Behind the statistics we find real people with real destinies. There are care providers who lose staff and struggle to replace them, which in turn causes suffering to patients and vulnerable people. There are higher and further education institutions whose resources will decrease significantly when EU funding is no longer accessible. There are business owners who see profits drop as relations with their most important trade partners waver. And there are homeowners whose life savings crumble as the property market declines.

We mustn't forget the few optimistic voices in the study. Generally, there seemed to be a 33/67 divide between pessimistic and optimistic views. Among others, representatives of the second-hand retail sector had a positive view, as did businesses trading beyond the EU which could see advantages with a deregulated market.

The authors would like to thank all participants in the study and the Wandsworth Chamber of Commerce for its assistance in distributing the survey. We'd also like to thank all members of the European Movement for Wandsworth for giving their time and enthusiasm. We have received no funding to carry out this research. We would be happy to discuss further the study with interested parties, including groups and organisations interested in conduct similar exercises in their own areas.

Appendix A: Anecdotal remarks

At the end of the survey respondents had the option to leave further comment, which are listed below without editing.

Broadly positive about Brexit

- “Brexit should provide the opportunity for improved investment into UK businesses, due to the influx of low cost labour not just from EU countries we have seen a drop in the productivity but worse still is the acceptance that we have lower productivity, the UK now must stand up and drive quality and opportunity.”
- “If the government negotiates GDPR; e-commerce regulatory compliance well (i.e. VERY light touch with no convergence) our sector will boom, hugely. If, as expected, the EU implements a Tobin Tax, our clients in the City will boom and City trade will easily treble almost overnight. If, as expected, barriers are erected against product markets, we expect a boom in African and S American clients looking to sell goods and produce here, as well as to export from here to their home countries. So ‘hard’ Brexit doesn’t scare us one bit.”
- “Anyone with basic knowledge of economics can see positives in moving to less regulated trade area. Rather than restricting my business to inside an arbitrary fence. I look forward for opportunities to trade with countries otherwise excluded by the EU like Australia, and hire staff from countries other than those who are within the EU who currently have an unfair advantage.”
- “I think that leaving the EU is good for the country - a positive move. All our goods are made in Britain which customers seem to want especially from US, Hong Kong, Dubai, Russia and the also the EU. Leaving the EU will be better for trade deals further afield.”
- “As a small business prior to Brexit things weren’t great due to the recession. After Brexit I expect business will look up. Need to stick together and persevere for success.”

Broadly negative about Brexit

- “Generally post Brexit expectations are negative; investment, skills, diversity, all are likely to take a step backwards. The question is why? What would be the benefit? I am yet to be convinced there is any benefit, financial or otherwise.”
- “I had a native French speaker working for me to assist in business in Morocco and to solicit new client publishers from France - she has left because she no longer feels settled here - she will be hard to replace”
- “Brexit will hit service businesses like mine, with large “invisible” exports to the EU, particularly hard as it is clear no post-Brexit deal on movement of services with the EU will be possible.”
- “Our clients are multinationals headquartered in the UK. It is quite possible that some will relocate relevant operations to mainland Europe or elsewhere. We don’t know. The operation of our subsidiary in Slovenia might be impacted by Brexit, but again, we don’t know. This uncertainty is not good. When we transact business in Slovenia we are seen as a laughing stock because of the ineptitude of our government. This in itself is not good for business.”
- “In our sector, we depend heavily on EU employees, we don’t know what we’ll do or where we’d be when if workers from the EU stop coming, or start leaving or both! British workers are not interested in the hospitality industry.”
- “Brexit means we will leave and set up in the EU”
- “I am owner operator in my traditional painting and decorating specialist service and from January 2018 I got letters from all UK major supplier saying that all paint/materials/sundries are increasing from 8-19% depending brand, so far from 2 year I didn’t increase any labour charges but I will need to add minimum 8-12% of cost due to not taking hit on me and my business..”

- “We may look to relocate parts of our company as we grow to a European country as a result of Brexit. We also worry about the ability to recruit talent- especially with the right language skills for our business.”
- “We currently employ about 30 carers in our business. Almost all of them have come to the UK from Africa and the Caribbean, with some from European Union countries. Whilst the latter category is currently a minority, it is still an important element of the workforce. If restrictions are placed on immigration from Europe, as has been proposed as part of Brexit, this can only adversely affect our business.”
- “The largest factor affecting business is the economic uncertainty Brexit has caused and the time that is now having to be spent by the Government focusing on Brexit when there are so many other things to sort out”
- “Already my cost of sales has increased by 10% which will have to be passed on to the customer.”
- “The Tories should be the party that cares about business and the economy. They seem to have abandoned these ideals based on a small percentage of voters that want to substantially reduce immigration. British business, care services, construction, higher education etc are reliant on this same immigration to thrive and grow the economy for everyone’s benefit.”
- “Brexit it going to push our costs up and at the same time make it more expensive for us to sell”
- “I recently shut my business as consumer confidence shattered after Brexit. The week after the vote turnover started to fall. The margins in the hospitality business are so tight that I could not survive with the fall off in trade. There is an existential crisis in the hospitality business due to chronic staff shortages as workers return to their countries of origin and falling levels of disposable income. I also work as a chartered surveyor and the property market is as flat as I have ever seen it.”
- “I have high volume of customers from the EU”
- “Expect food to become more expensive. May be less customers and harder to find staff. Rent and rates may go up. Already affecting business eg higher costs. I feel negative about the impact of Brexit”
- “Since Brexit news has spread , I have found extremely difficult to replace the stylist who left us 5 months ago. We are simply not getting good candidates. I am having to serious think about the future prospect of my small hairdressing business.”
- “We are a Government funded training provider. Most of the funds to finance the delivery of Apprenticeships now comes from UK employers, however, a proportion also comes from the EU via the European Social Fund (ESF). Should the UK leave the EU then there is a question as to what will happen to the millions of pounds that helps support ESF funded projects. Given the UK Government's shift towards employers now having more control over the funding of Apprenticeships, I do not believe leaving the EU will impact the FE industry. However, a large proportion of students/Apprentices do come from EU nations which Brexit is likely to negatively impact, leading to a huge shortage of unskilled workers in the UK. This impact is already hitting UK farmers who rely on recruiting EU nationals to manage/circulate crop supplies. The full impact on how workers - both UK and EU born - will be affected by Brexit remains to be seen, as well as the impact on those industries already seeing skills shortages (such as digitech skills).”
- “The uncertainty of Brexit is the biggest issue, it is infiltrating every area of business and unfortunately the Prime Minister seems to be completely disinterested in business or the fact that SMEs are the heart and soul of the economic platform in this country and we pay all of our Corporation Taxes as we cannot afford to have smart tax advisors.”

Mixed feelings about Brexit

- “I hope Brexit will not affect us too badly - people will be looking and buying cheaper hopefully within the charity retail sector”
- “The Borough should give a helping hand in helping us small businesses”

- “EU relationship should still be the same after Brexit, but the only thing is that they must respect our independent, laws and talents as a nation for that relationship to continue or flourish and we also must respect their rules and laws in order to continue to do business together. Where there is concerns, we need to come to an agreement 50/50 in order to move forward.”

Appendix B: List of Questions

The questions posed in the survey were as follows:

1. In which sector does your organisation/business operate?
2. On a scale from 1 (pessimistic) to 6 (optimistic), how do you perceive the prospects after Brexit of your organisation/business?
3. Approximately how many people work in your organisation/business?
4. What approximate percentage of staff in your organisation/business is from other EU countries?
5. Based on what is known so far about the Brexit plans, how likely are you to hire staff for your organisation?
Scale from 1 (less likely) to 6 (more likely)
6. Do you import from/export to the EU?
Yes/ No
7. If you trade with the EU, do you expect the trade to increase or decrease after Brexit?
Increase/ Decrease
8. If you trade with the EU, do you expect the profit from trade with the EU to increase or decrease?
Increase/Decrease
9. Based on what is known so far about the Brexit plans are you more or less likely to invest in your organisation/business? Scale from 1 (less likely) to 6 (more likely)

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