

Business Birmingham – Foreign Direct Investors Study

METHODOLOGY NOTE

ComRes interviewed 105 adults who have been involved in making a direct investment in the UK in the past 12 months. Interviews were conducted online between 5th and 11th July 2013. Respondents were selected from four countries (USA:31, Australia:26, France:25 and Germany:23). ComRes is a member of the British Polling Council and abides by its rules.

All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.

To commission a voting intention poll or a public opinion survey please contact Andrew Hawkins: andrew.hawkins@comres.co.uk

To register for Pollwatch, a monthly newsletter update on the polls, please email: pollwatch@comres.co.uk

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Access to European market

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	11	4	4	-	3	2	4	8	2	2	1	3	5	-	3	1	7	2
	10%	13%	15%	-	12%	8%	14%	16%	8%	10%	6%	11%	11%	-	21%	5%	15%	7%
		c	c		c										c			
Second Reason	17	5	7	2	3	2	3	3	6	4	3	3	5	5	3	3	7	6
	16%	16%	27%	9%	12%	8%	11%	6%	25%	19%	18%	11%	11%	33%	21%	14%	15%	22%
									C					ab				
Third Reason	9	6	2	-	1	2	4	3	1	2	1	2	4	3	-	3	3	1
	9%	19%	8%	-	4%	8%	14%	6%	4%	10%	6%	7%	9%	20%	-	14%	6%	4%
		Cd												d				
Net - top 3	37	15	13	2	7	6	11	14	9	8	5	8	14	8	6	7	17	9
	35%	48%	50%	9%	28%	24%	39%	29%	38%	38%	29%	29%	31%	53%	43%	32%	35%	33%
		C	C		c													
Not given as reason	68	16	13	21	18	19	17	35	15	13	12	20	31	7	8	15	31	18
	65%	52%	50%	91%	72%	76%	61%	71%	63%	62%	71%	71%	69%	47%	57%	68%	65%	67%
				ABd														

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Access to European market

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	11	10	-	10	-	8	2	5	3	10	-
	10%	13%	-	13%	-	13%	15%	10%	19%	14%	-
Second Reason	17	14	1	12	2	12	1	8	4	13	-
	16%	18%	20%	16%	40%	19%	8%	16%	25%	18%	-
Third Reason	9	7	1	6	1	6	-	4	-	7	1
	9%	9%	20%	8%	20%	10%	-	8%	-	9%	13%
Net - top 3	37	31	2	28	3	26	3	17	7	30	1
	35%	40%	40%	37%	60%	41%	23%	33%	44%	41%	13%
Not given as reason	68	46	3	47	2	37	10	34	9	44	7
	65%	60%	60%	63%	40%	59%	77%	67%	56%	59%	88%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Access to UK market

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	18	5	3	6	4	5	3	9	2	1	3	5	3	5	3	4	7	6
	17%	16%	12%	26%	16%	20%	11%	18%	8%	5%	18%	18%	7%	33%	21%	18%	15%	22%
														B				
Second Reason	10	5	3	2	-	1	1	5	5	3	-	-	6	2	2	-	5	4
	10%	16%	12%	9%	-	4%	4%	10%	21%	14%	-	-	13%	13%	14%	-	10%	15%
		D	d						abf				A	a	A			a
Third Reason	14	2	5	6	1	-	3	8	-	1	1	4	7	1	2	4	6	3
	13%	6%	19%	26%	4%	-	11%	16%	-	5%	6%	14%	16%	7%	14%	18%	13%	11%
			d	AD			a	AD			AD							
Net - top 3	42	12	11	14	5	6	7	22	7	5	4	9	16	8	7	8	18	13
	40%	39%	42%	61%	20%	24%	25%	45%	29%	24%	24%	32%	36%	53%	50%	36%	38%	48%
			d	D				ab										
Not given as reason	63	19	15	9	20	19	21	27	17	16	13	19	29	7	7	14	30	14
	60%	61%	58%	39%	80%	76%	75%	55%	71%	76%	76%	68%	64%	47%	50%	64%	63%	52%
				bC		c	c											

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Access to UK market

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	18	12	1	13	2	9	3	4	7	10	1
	17%	16%	20%	17%	40%	14%	23%	8%	44%	14%	13%
									A		
Second Reason	10	7	-	7	-	7	1	4	1	7	-
	10%	9%	-	9%	-	11%	8%	8%	6%	9%	-
Third Reason	14	10	-	9	-	9	1	8	2	12	-
	13%	13%	-	12%	-	14%	8%	16%	13%	16%	-
Net - top 3	42	29	1	29	2	25	5	16	10	29	1
	40%	38%	20%	39%	40%	40%	38%	31%	63%	39%	13%
									A		
Not given as reason	63	48	4	46	3	38	8	35	6	45	7
	60%	62%	80%	61%	60%	60%	62%	69%	38%	61%	88%
									B		

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Technology and communications infrastructure

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	3	1	2	-	-	1	-	1	1	-	-	-	2	1	-	1	-	1
	3%	3%	8%	-	-	4%	-	2%	4%	-	-	-	4%	7%	-	5%	-	4%
Second Reason	2	2	-	-	-	2	1	2	1	2	1	1	-	-	1	-	2	-
	2%	6%	-	-	-	8%	4%	4%	4%	10%	6%	4%	-	-	7%	-	4%	-
Third Reason	4	-	-	2	2	2	2	3	-	-	1	2	2	-	-	1	2	1
	4%	-	-	9%	8%	8%	7%	6%	-	-	6%	7%	4%	-	-	5%	4%	4%
Net - top 3	9	3	2	2	2	5	3	6	2	2	2	3	4	1	1	2	4	2
	9%	10%	8%	9%	8%	20%	11%	12%	8%	10%	12%	11%	9%	7%	7%	9%	8%	7%
Not given as reason	96	28	24	21	23	20	25	43	22	19	13	25	41	14	13	20	44	25
	91%	90%	92%	91%	92%	80%	89%	88%	92%	90%	88%	89%	91%	93%	93%	91%	92%	93%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Technology and communications infrastructure

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	3	2	-	2	-	2	-	2	-	1	-
	3%	3%	-	3%	-	3%	-	4%	-	1%	-
Second Reason	2	2	-	2	-	2	-	2	-	2	-
	2%	3%	-	3%	-	3%	-	4%	-	3%	-
Third Reason	4	3	-	3	-	2	-	2	1	3	-
	4%	4%	-	4%	-	3%	-	4%	6%	4%	-
Net - top 3	9	7	-	7	-	6	-	6	1	6	-
	9%	9%	-	9%	-	10%	-	12%	6%	8%	-
Not given as reason	96	70	5	68	5	57	13	45	15	68	8
	91%	91%	100%	91%	100%	90%	100%	88%	94%	92%	100%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Transport and logistics infrastructure

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	6	2	2	2	-	-	-	3	2	1	2	2	3	-	1	2	3	-	
	6%	6%	8%	9%	-	-	-	6%	8%	5%	12%	7%	7%	-	7%	9%	6%	-	
										ab									
Second Reason	8	3	1	2	2	1	4	4	1	1	-	1	5	2	-	2	3	2	
	8%	10%	4%	9%	8%	4%	14%	8%	4%	5%	-	4%	11%	13%	-	9%	6%	7%	
Third Reason	7	1	5	1	-	1	2	3	1	1	3	1	3	1	2	1	5	-	
	7%	3%	19%	4%	-	4%	7%	6%	4%	5%	18%	4%	7%	7%	14%	5%	10%	-	
			aD														c		
Net - top 3	21	6	8	5	2	2	6	10	4	3	5	4	11	3	3	5	11	2	
	20%	19%	31%	22%	8%	8%	21%	20%	17%	14%	29%	14%	24%	20%	21%	23%	23%	7%	
			D							a							c		
Not given as reason	84	25	18	18	23	23	22	39	20	18	12	24	34	12	11	17	37	25	
	80%	81%	69%	78%	92%	92%	79%	80%	83%	86%	71%	86%	76%	80%	79%	77%	77%	93%	
				B		f												b	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Transport and logistics infrastructure

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	5	1	5	-	5	1	5	-	5	-
	6%	6%	20%	7%	-	8%	8%	10%	-	7%	-
Second Reason	8	5	-	5	1	4	1	3	1	5	2
	8%	6%	-	7%	20%	6%	8%	6%	6%	7%	25%
											a
Third Reason	7	5	-	6	-	5	-	3	1	6	-
	7%	6%	-	8%	-	8%	-	6%	6%	8%	-
Net - top 3	21	15	1	16	1	14	2	11	2	16	2
	20%	19%	20%	21%	20%	22%	15%	22%	13%	22%	25%
Not given as reason	84	62	4	59	4	49	11	40	14	58	6
	80%	81%	80%	79%	80%	78%	85%	78%	88%	78%	75%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Language and time zone

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	1	2	2	1	-	2	2	2	-	-	2	1	2	1	2	1	2
	6%	3%	8%	9%	4%	-	7%	4%	8%	-	-	15%	4%	4%	7%	14%	9%	7%
											ae							
Second Reason	11	2	2	3	4	1	1	7	1	2	1	2	4	2	4	4	3	3
	10%	6%	8%	13%	16%	4%	4%	14%	4%	10%	6%	15%	9%	13%	29%	18%	6%	11%
															Ab			
Third Reason	7	1	2	1	3	1	2	4	3	3	2	1	4	2	-	-	4	3
	7%	3%	8%	4%	12%	4%	7%	8%	13%	14%	12%	8%	9%	13%	-	-	8%	11%
Net - top 3	24	4	6	6	8	2	5	13	6	5	3	5	10	5	6	6	8	8
	23%	13%	23%	26%	32%	8%	18%	27%	25%	24%	18%	38%	22%	33%	43%	27%	17%	30%
				a	a		a				A			a	A			
Not given as reason	81	27	20	17	17	23	23	36	18	16	14	8	35	10	8	16	40	19
	77%	87%	77%	74%	68%	92%	82%	73%	75%	76%	82%	62%	78%	67%	57%	73%	83%	70%
		d			cG							cD						

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Language and time zone

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	4	-	4	-	-	-	-	-	3	-
	6%	5%	-	5%	-	-	-	-	-	4%	-
Second Reason	11	7	-	7	-	4	-	5	3	9	-
	10%	9%	-	9%	-	6%	-	10%	19%	12%	-
Third Reason	7	6	-	5	1	4	2	2	3	5	1
	7%	8%	-	7%	20%	6%	15%	4%	19%	7%	13%
									a		
Net - top 3	24	17	-	16	1	8	2	7	6	17	1
	23%	22%	-	21%	20%	13%	15%	14%	38%	23%	13%
									A		
Not given as reason	81	60	5	59	4	55	11	44	10	57	7
	77%	78%	100%	79%	80%	87%	85%	86%	63%	77%	88%
									B		

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Skilled workforce

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	6	1	1	1	3	2	2	3	1	1	-	-	1	5	-	-	-	1	5
	6%	3%	4%	4%	12%	8%	7%	6%	4%	5%	-	-	4%	11%	-	-	-	2%	19%
																			AB
Second Reason	6	-	3	1	2	1	1	2	1	1	-	1	3	1	2	-	3	2	1
	6%	-	12%	4%	8%	4%	4%	4%	4%	5%	-	8%	11%	2%	13%	-	14%	4%	4%
			a											b					
Third Reason	13	5	2	3	3	6	4	5	5	3	3	1	4	6	2	1	2	6	4
	12%	16%	8%	13%	12%	24%	14%	10%	21%	14%	18%	8%	14%	13%	13%	7%	9%	13%	15%
Net - top 3	25	6	6	5	8	9	7	10	7	5	3	2	8	12	4	1	5	9	10
	24%	19%	23%	22%	32%	36%	25%	20%	29%	24%	18%	15%	29%	27%	27%	7%	23%	19%	37%
																			b
Not given as reason	80	25	20	18	17	16	21	39	17	16	14	11	20	33	11	13	17	39	17
	76%	81%	77%	78%	68%	64%	75%	80%	71%	76%	82%	85%	71%	73%	73%	93%	77%	81%	63%
																			c

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Skilled workforce

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	4	-	6	-	4	2	4	1	3	-
	6%	5%	-	8%	-	6%	15%	8%	6%	4%	-
Second Reason	6	4	-	4	-	4	1	3	1	4	-
	6%	5%	-	5%	-	6%	8%	6%	6%	5%	-
Third Reason	13	11	-	9	-	5	3	8	2	9	2
	12%	14%	-	12%	-	8%	23%	16%	13%	12%	25%
Net - top 3	25	19	-	19	-	13	6	15	4	16	2
	24%	25%	-	25%	-	21%	46%	29%	25%	22%	25%
							a				
Not given as reason	80	58	5	56	5	50	7	36	12	58	6
	76%	75%	100%	75%	100%	79%	54%	71%	75%	78%	75%
							b				

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

R&D and innovation capability

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	6	1	1	1	3	2	3	3	3	1	2	1	-	5	1	-	1	4	1
	6%	3%	4%	4%	12%	8%	11%	6%	13%	5%	12%	8%	-	11%	7%	-	5%	8%	4%
Second Reason	1	-	-	-	1	-	-	1	-	-	-	-	-	1	-	-	-	-	1
	1%	-	-	-	4%	-	-	2%	-	-	-	-	-	2%	-	-	-	-	4%
Third Reason	5	1	2	1	1	3	-	1	-	-	-	-	2	1	1	-	2	2	
	5%	3%	8%	4%	4%	12%	-	2%	-	-	-	-	4%	7%	7%	-	4%	7%	
Net - top 3	12	2	3	2	5	5	3	5	3	1	2	1	-	8	2	1	1	6	4
	11%	6%	12%	9%	20%	20%	11%	10%	13%	5%	12%	8%	-	18%	13%	7%	5%	13%	15%
Not given as reason	93	29	23	21	20	20	25	44	21	20	15	12	28	37	13	13	21	42	23
	89%	94%	88%	91%	80%	80%	89%	90%	88%	95%	88%	92%	100%	82%	87%	93%	95%	88%	85%
													Bc						

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

R&D and innovation capability

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	4	-	3	1	3	1	3	1	3	2
	6%	5%	-	4%	20%	5%	8%	6%	6%	4%	25%
											A
Second Reason	1	1	-	1	-	1	-	1	-	-	-
	1%	1%	-	1%	-	2%	-	2%	-	-	-
Third Reason	5	4	1	4	-	4	-	2	-	1	1
	5%	5%	20%	5%	-	6%	-	4%	-	1%	13%
											a
Net - top 3	12	9	1	8	1	8	1	6	1	4	3
	11%	12%	20%	11%	20%	13%	8%	12%	6%	5%	38%
											A
Not given as reason	93	68	4	67	4	55	12	45	15	70	5
	89%	88%	80%	89%	80%	87%	92%	88%	94%	95%	63%
										B	

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Exchange rates

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	8	1	3	2	2	4	4	1	2	2	3	1	5	2	-	2	5	-	
	8%	3%	12%	9%	8%	14%	8%	4%	10%	12%	23%	4%	11%	13%	-	9%	10%	-	
											ad						c		
Second Reason	4	-	1	2	1	2	2	1	3	1	3	2	2	2	-	-	-	3	1
	4%	-	4%	9%	4%	7%	2%	13%	5%	18%	15%	7%	4%	-	-	-	6%	4%	
								c		C	c								
Third Reason	7	3	2	-	2	2	3	3	3	-	-	3	2	-	2	4	-	3	
	7%	10%	8%	-	8%	7%	6%	13%	14%	-	-	11%	4%	-	14%	18%	-	11%	
																B		B	
Net - top 3	19	4	6	4	5	8	8	7	6	5	5	6	9	2	2	6	8	4	
	18%	13%	23%	17%	20%	29%	16%	29%	29%	29%	38%	21%	20%	13%	14%	27%	17%	15%	
											c								
Not given as reason	86	27	20	19	20	20	41	17	15	12	8	22	36	13	12	16	40	23	
	82%	87%	77%	83%	80%	71%	84%	71%	71%	71%	62%	79%	80%	87%	86%	73%	83%	85%	
											g								

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Exchange rates

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	8	4	1	5	1	6	1	5	1	5	2
	8%	5%	20%	7%	20%	10%	8%	10%	6%	7%	25%
											a
Second Reason	4	3	1	3	-	3	-	2	-	2	-
	4%	4%	20%	4%	-	5%	-	4%	-	3%	-
Third Reason	7	7	-	6	-	7	-	5	-	7	-
	7%	9%	-	8%	-	11%	-	10%	-	9%	-
Net - top 3	19	14	2	14	1	16	1	12	1	14	2
	18%	18%	40%	19%	20%	25%	8%	24%	6%	19%	25%
Not given as reason	86	63	3	61	4	47	12	39	15	60	6
	82%	82%	60%	81%	80%	75%	92%	76%	94%	81%	75%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Tax rates & other costs

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	6	1	1	2	2	3	1	3	2	2	1	3	1	2	2	1	2	3	1
	6%	3%	4%	9%	8%	12%	4%	6%	8%	10%	6%	23%	4%	4%	13%	7%	9%	6%	4%
											bc								
Second Reason	10	1	1	4	4	1	4	5	-	-	1	-	4	4	-	1	2	5	2
	10%	3%	4%	17%	16%	4%	14%	10%	-	-	6%	-	14%	9%	-	7%	9%	10%	7%
				a		de													
Third Reason	3	1	-	1	1	1	-	-	2	1	-	-	1	2	-	-	-	2	1
	3%	3%	-	4%	4%	4%	-	-	8%	5%	-	-	4%	4%	-	-	-	4%	4%
									C										
Net - top 3	19	3	2	7	7	5	5	8	4	3	2	3	6	8	2	2	4	10	4
	18%	10%	8%	30%	28%	20%	18%	16%	17%	14%	12%	23%	21%	18%	13%	14%	18%	21%	15%
				aB	ab														
Not given as reason	86	28	24	16	18	20	23	41	20	18	15	10	22	37	13	12	18	38	23
	82%	90%	92%	70%	72%	80%	82%	84%	83%	86%	88%	77%	79%	82%	87%	86%	82%	79%	85%
		cd	Cd																

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Tax rates & other costs

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	5	-	5	-	3	-	2	-	5	-
	6%	6%	-	7%	-	5%	-	4%	-	7%	-
Second Reason	10	6	-	5	-	8	1	8	-	10	-
	10%	8%	-	7%	-	13%	8%	16%	-	14%	-
								b			
Third Reason	3	2	1	2	-	3	-	1	-	2	-
	3%	3%	20%	3%	-	5%	-	2%	-	3%	-
			A								
Net - top 3	19	13	1	12	-	14	1	11	-	17	-
	18%	17%	20%	16%	-	22%	8%	22%	-	23%	-
								B			
Not given as reason	86	64	4	63	5	49	12	40	16	57	8
	82%	83%	80%	84%	100%	78%	92%	78%	100%	77%	100%
								A			

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Availability of finance in the UK

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	5	3	-	-	2	2	1	1	3	-	-	2	2	1	-	1	2	2	
	5%	10%	-	-	8%	8%	7%	2%	4%	14%	-	7%	4%	7%	-	5%	4%	7%	
									C										
Second Reason	11	3	2	3	3	6	3	6	3	1	4	1	6	4	-	1	4	5	1
	10%	10%	8%	13%	12%	24%	11%	12%	13%	5%	24%	8%	21%	9%	-	7%	18%	10%	4%
						e				e									
Third Reason	7	2	2	1	2	1	1	1	3	2	1	3	2	-	1	-	2	3	
	7%	6%	8%	4%	8%	4%	4%	2%	4%	14%	12%	11%	4%	-	7%	-	4%	11%	
									C										
Net - top 3	23	8	4	4	7	9	6	8	5	7	6	2	11	8	1	2	5	9	6
	22%	26%	15%	17%	28%	36%	21%	16%	21%	33%	35%	15%	39%	18%	7%	14%	23%	19%	22%
						c							BC						
Not given as reason	82	23	22	19	18	16	22	41	19	14	11	11	17	37	14	12	17	39	21
	78%	74%	85%	83%	72%	64%	79%	84%	79%	67%	65%	85%	61%	82%	93%	86%	77%	81%	78%
								a					A	A					

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Availability of finance in the UK

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	5	4	1	3	-	4	-	3	-	4	-
	5%	5%	20%	4%	-	6%	-	6%	-	5%	-
Second Reason	11	10	-	10	-	6	1	6	1	8	-
	10%	13%	-	13%	-	10%	8%	12%	6%	11%	-
Third Reason	7	4	-	5	-	3	2	4	1	5	-
	7%	5%	-	7%	-	5%	15%	8%	6%	7%	-
Net - top 3	23	18	1	18	-	13	3	13	2	17	-
	22%	23%	20%	24%	-	21%	23%	25%	13%	23%	-
Not given as reason	82	59	4	57	5	50	10	38	14	57	8
	78%	77%	80%	76%	100%	79%	77%	75%	88%	77%	100%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Support provided to invest in UK (e.g. by UKTI)

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	4	2	-	1	1	2	1	3	1	1	2	3	1	-	-	2	1	1	
	4%	6%	-	4%	4%	8%	4%	6%	4%	5%	12%	11%	2%	-	-	9%	2%	4%	
Second Reason	5	3	-	2	-	1	2	3	1	3	2	-	4	-	-	-	5	-	
	5%	10%	-	9%	-	4%	7%	6%	4%	14%	12%	-	9%	-	-	-	10%	-	
																	c		
Third Reason	4	1	-	1	2	2	2	3	1	2	1	-	1	2	1	1	2	1	
	4%	3%	-	4%	8%	8%	7%	6%	4%	10%	6%	-	2%	13%	7%	5%	4%	4%	
														ab					
Net - top 3	13	6	-	4	3	5	5	9	3	6	5	3	6	2	1	3	8	2	
	12%	19%	-	17%	12%	20%	18%	18%	13%	29%	29%	23%	11%	13%	7%	14%	17%	7%	
		B		B	b														
Not given as reason	92	25	26	19	22	20	23	40	21	15	12	10	25	39	13	13	19	25	
	88%	81%	100%	83%	88%	80%	82%	82%	88%	71%	71%	77%	89%	87%	87%	93%	86%	93%	
			ACd																

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Support provided to invest in UK (e.g. by UKTI)

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	4	3	-	3	-	2	1	4	-	4	-
	4%	4%	-	4%	-	3%	8%	8%	-	5%	-
Second Reason	5	5	-	5	-	4	1	3	1	4	1
	5%	6%	-	7%	-	6%	8%	6%	6%	5%	13%
Third Reason	4	2	-	2	-	2	-	2	-	2	1
	4%	3%	-	3%	-	3%	-	4%	-	3%	13%
Net - top 3	13	10	-	10	-	8	2	9	1	10	2
	12%	13%	-	13%	-	13%	15%	18%	6%	14%	25%
Not given as reason	92	67	5	65	5	55	11	42	15	64	6
	88%	87%	100%	87%	100%	87%	85%	82%	94%	86%	75%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Quality of life

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	7	2	2	1	2	2	2	2	1	1	1	1	3	1	1	-	3	2
	7%	6%	8%	4%	8%	7%	4%	8%	5%	6%	8%	4%	7%	7%	7%	-	6%	7%
Second Reason	4	4	-	-	1	1	1	-	2	1	-	3	1	-	-	-	1	2
	4%	13%	-	-	4%	4%	2%	-	10%	6%	-	11%	2%	-	-	-	2%	7%
		bcd																
Third Reason	4	2	-	-	2	1	3	2	1	1	1	2	2	-	-	2	1	1
	4%	6%	-	-	8%	4%	6%	8%	5%	6%	8%	7%	4%	-	-	9%	2%	4%
Net - top 3	15	8	2	1	4	4	6	4	4	3	2	6	6	1	1	2	5	5
	14%	26%	8%	4%	16%	14%	12%	17%	19%	18%	15%	21%	13%	7%	7%	9%	10%	19%
		bC																
Not given as reason	90	23	24	22	21	20	24	43	20	17	14	22	39	14	13	20	43	22
	86%	74%	92%	96%	84%	80%	86%	88%	83%	81%	85%	79%	87%	93%	93%	91%	90%	81%
			a	A														

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Quality of life

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	7	5	-	4	-	5	-	4	1	6	-
	7%	6%	-	5%	-	8%	-	8%	6%	8%	-
Second Reason	4	2	1	3	1	2	2	3	-	3	-
	4%	3%	20%	4%	20%	3%	15%	6%	-	4%	-
			A				a				
Third Reason	4	3	-	3	-	3	-	4	-	3	-
	4%	4%	-	4%	-	5%	-	8%	-	4%	-
Net - top 3	15	10	1	10	1	10	2	11	1	12	-
	14%	13%	20%	13%	20%	16%	15%	22%	6%	16%	-
Not given as reason	90	67	4	65	4	53	11	40	15	62	8
	86%	87%	80%	87%	80%	84%	85%	78%	94%	84%	100%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Grants or other financial incentives

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	2	-	-	2	-	1	-	2	1	-	-	1	1	-	-	-	2	-
	2%	-	-	9%	-	4%	-	4%	4%	-	-	4%	2%	-	-	-	4%	-
Second Reason	7	1	3	1	2	3	2	2	1	-	-	2	4	1	-	1	3	2
	7%	3%	12%	4%	8%	12%	7%	4%	4%	-	-	7%	9%	7%	-	5%	6%	7%
Third Reason	5	1	2	1	1	1	2	4	2	1	1	2	2	-	1	1	4	-
	5%	3%	8%	4%	4%	4%	7%	8%	8%	5%	6%	7%	4%	-	7%	5%	8%	-
Net - top 3	14	2	5	4	3	5	4	8	4	1	1	5	7	1	1	2	9	2
	13%	6%	19%	17%	12%	20%	14%	16%	17%	5%	6%	18%	16%	7%	7%	9%	19%	7%
Not given as reason	91	29	21	19	22	20	24	41	20	20	16	23	38	14	13	20	39	25
	87%	94%	81%	83%	88%	80%	86%	84%	83%	95%	94%	82%	84%	93%	93%	91%	81%	93%

Columns Tested: A,B,C,D - A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Grants or other financial incentives

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	2	1	-	-	-	1	1	-	1	1	1
	2%	1%	-	-	-	2%	8%	-	6%	1%	13%
									a		a
Second Reason	7	5	1	4	-	2	1	1	1	2	3
	7%	6%	20%	5%	-	3%	8%	2%	6%	3%	38%
										A	
Third Reason	5	4	1	3	1	3	-	2	1	4	-
	5%	5%	20%	4%	20%	5%	-	4%	6%	5%	-
Net - top 3	14	10	2	7	1	6	2	3	3	7	4
	13%	13%	40%	9%	20%	10%	15%	6%	19%	9%	50%
										A	
Not given as reason	91	67	3	68	4	57	11	48	13	67	4
	87%	87%	60%	91%	80%	90%	85%	94%	81%	91%	50%
										B	

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Proximity to existing and potential clients

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	15	6	5	3	1	2	3	5	3	6	3	2	6	5	1	3	3	8	4
	14%	19%	19%	13%	4%	8%	11%	10%	13%	29%	18%	15%	21%	11%	7%	21%	14%	17%	15%
		d	d						ac										
Second Reason	7	1	3	1	2	3	2	7	1	1	1	1	3	1	2	2	3	2	
	7%	3%	12%	4%	8%	12%	7%	14%	4%	5%	6%	8%	7%	7%	14%	9%	6%	7%	
Third Reason	14	4	2	5	3	1	2	8	3	-	1	2	5	3	3	2	8	4	
	13%	13%	8%	22%	12%	4%	7%	16%	13%	-	6%	15%	11%	20%	21%	9%	17%	15%	
							e				e								
Net - top 3	36	11	10	9	6	6	7	20	7	7	5	5	13	5	8	7	19	10	
	34%	35%	38%	39%	24%	24%	25%	41%	29%	33%	29%	38%	29%	33%	57%	32%	40%	37%	
															b				
Not given as reason	69	20	16	14	19	19	21	29	17	14	12	8	32	10	6	15	29	17	
	66%	65%	62%	61%	76%	76%	75%	59%	71%	67%	71%	62%	71%	67%	43%	68%	60%	63%	
													d						

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Proximity to existing and potential clients

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	15	13	-	11	-	10	-	9	1	14	1
	14%	17%	-	15%	-	16%	-	18%	6%	19%	13%
Second Reason	7	5	-	6	-	3	2	1	3	5	1
	7%	6%	-	8%	-	5%	15%	2%	19%	7%	13%
									A		
Third Reason	14	8	-	11	1	6	4	3	5	8	1
	13%	10%	-	15%	20%	10%	31%	6%	31%	11%	13%
							A		A		
Net - top 3	36	26	-	28	1	19	6	13	9	27	3
	34%	34%	-	37%	20%	30%	46%	25%	56%	36%	38%
									A		
Not given as reason	69	51	5	47	4	44	7	38	7	47	5
	66%	66%	100%	63%	80%	70%	54%	75%	44%	64%	63%
									B		

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

First reason

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Access to UK market	18	5	3	6	4	5	3	9	2	1	3	5	3	5	3	4	7	6	
	17%	16%	12%	26%	16%	20%	11%	18%	8%	5%	18%	18%	7%	33%	21%	18%	15%	22%	
Proximity to existing and potential clients	15	6	5	3	1	2	3	5	3	6	3	6	5	1	3	3	8	4	
	14%	19%	19%	13%	4%	8%	11%	10%	13%	29%	18%	21%	11%	7%	21%	14%	17%	15%	
Access to European market	11	4	4	-	3	2	4	8	2	2	1	3	5	-	3	1	7	2	
	10%	13%	15%	-	12%	8%	14%	16%	8%	10%	6%	11%	11%	-	21%	5%	15%	7%	
Exchange rates	8	1	3	2	2	1	4	4	1	2	2	1	5	2	-	2	5	-	
	8%	3%	12%	9%	8%	4%	14%	8%	4%	10%	12%	4%	11%	13%	-	9%	10%	-	
Quality of life	7	2	2	1	2	2	2	2	1	1	1	1	3	1	1	-	3	2	
	7%	6%	8%	4%	8%	8%	7%	4%	8%	5%	6%	4%	7%	7%	7%	-	6%	7%	
Transport and logistics infrastructure	6	2	2	2	-	-	-	3	2	1	2	2	3	-	1	2	3	-	
	6%	6%	8%	9%	-	-	-	6%	8%	5%	12%	7%	7%	-	7%	9%	6%	-	
Language and time zone	6	1	2	2	1	-	2	2	2	-	-	1	2	1	2	2	1	2	
	6%	3%	8%	9%	4%	-	7%	4%	8%	-	-	4%	4%	7%	14%	9%	2%	7%	
Skilled workforce	6	1	1	1	3	2	2	3	1	1	-	1	5	-	-	-	1	5	
	6%	3%	4%	4%	12%	8%	7%	6%	4%	5%	-	4%	11%	-	-	-	2%	19%	
R&D and innovation capability	6	1	1	1	3	2	3	3	3	1	2	-	5	1	-	1	4	1	
	6%	3%	4%	4%	12%	8%	11%	6%	13%	5%	12%	-	11%	7%	-	5%	8%	4%	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

First reason

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Tax rates & other costs	6	1	1	2	2	3	1	3	2	2	1	3	1	2	2	1	3	1	
	6%	3%	4%	9%	8%	12%	4%	6%	8%	10%	6%	23% bc	4%	4%	13%	7%	9%	6%	4%
Availability of finance in the UK	5	3	-	-	2	2	2	1	1	3	-	2	2	1	-	1	2	2	
	5%	10%	-	-	8%	8%	7%	2%	4%	14% C	-	7%	4%	7%	-	5%	4%	7%	
Support provided to invest in UK (e.g. by UKTI)	4	2	-	1	1	2	1	3	1	1	2	3	1	-	-	2	1	1	
	4%	6%	-	4%	4%	8%	4%	6%	4%	5%	12%	11%	2%	-	-	9%	2%	4%	
Technology and communications infrastructure	3	1	2	-	-	1	-	1	1	-	-	-	2	1	-	1	-	1	
	3%	3%	8%	-	-	4%	-	2%	4%	-	-	-	4%	7%	-	5%	-	4%	
Grants or other financial incentives	2	-	-	2	-	1	-	2	1	-	-	1	1	-	-	-	2	-	
	2%	-	-	9%	-	4%	-	4%	4%	-	-	4%	2%	-	-	-	4%	-	
Don't know / prefer not to say	2	1	-	-	1	-	1	-	-	-	-	1	1	-	-	1	1	-	
	2%	3%	-	-	4%	-	4%	-	-	-	-	4%	2%	-	-	5%	2%	-	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

First reason

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Access to UK market	18	12	1	13	2	9	3	4	7	10	1
	17%	16%	20%	17%	40%	14%	23%	8%	44%	14%	13%
									A		
Proximity to existing and potential clients	15	13	-	11	-	10	-	9	1	14	1
	14%	17%	-	15%	-	16%	-	18%	6%	19%	13%
Access to European market	11	10	-	10	-	8	2	5	3	10	-
	10%	13%	-	13%	-	13%	15%	10%	19%	14%	-
Exchange rates	8	4	1	5	1	6	1	5	1	5	2
	8%	5%	20%	7%	20%	10%	8%	10%	6%	7%	25%
											a
Quality of life	7	5	-	4	-	5	-	4	1	6	-
	7%	6%	-	5%	-	8%	-	8%	6%	8%	-
Transport and logistics infrastructure	6	5	1	5	-	5	1	5	-	5	-
	6%	6%	20%	7%	-	8%	8%	10%	-	7%	-
Language and time zone	6	4	-	4	-	-	-	-	-	3	-
	6%	5%	-	5%	-	-	-	-	-	4%	-
Skilled workforce	6	4	-	6	-	4	2	4	1	3	-
	6%	5%	-	8%	-	6%	15%	8%	6%	4%	-
R&D and innovation capability	6	4	-	3	1	3	1	3	1	3	2
	6%	5%	-	4%	20%	5%	8%	6%	6%	4%	25%
											A
Tax rates & other costs	6	5	-	5	-	3	-	2	-	5	-
	6%	6%	-	7%	-	5%	-	4%	-	7%	-
Availability of finance in the UK	5	4	1	3	-	4	-	3	-	4	-
	5%	5%	20%	4%	-	6%	-	6%	-	5%	-

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

First reason

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Support provided to invest in UK (e.g. by UKTI)	4	3	-	3	-	2	1	4	-	4	-
	4%	4%	-	4%	-	3%	8%	8%	-	5%	-
Technology and communications infrastructure	3	2	-	2	-	2	-	2	-	1	-
	3%	3%	-	3%	-	3%	-	4%	-	1%	-
Grants or other financial incentives	2	1	-	-	-	1	1	-	1	1	1
	2%	1%	-	-	-	2%	8%	-	6%	1%	13%
									a		a
Don't know / prefer not to say	2	1	1	1	1	1	1	-	-	-	1
	2%	1%	20%	1%	20%	2%	8%	2%	-	-	13%
			A		A						A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Top three reasons

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Significance Level: 90%		a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
Significance Level: 95%		A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Total	105	31	26	23	25	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Access to UK market	42	12	11	14	5	6	7	22	7	5	4	5	9	16	8	7	8	18	13
	40%	39%	42%	61%	20%	24%	25%	45%	29%	24%	24%	38%	32%	36%	53%	50%	36%	38%	48%
			d	D				ab											
Access to European market	37	15	13	2	7	6	11	14	9	8	5	2	8	14	8	6	7	17	9
	35%	48%	50%	9%	28%	24%	39%	29%	38%	38%	29%	15%	29%	31%	53%	43%	32%	35%	33%
		C	C		c														
Proximity to existing and potential clients	36	11	10	9	6	6	7	20	7	7	5	5	9	13	5	8	7	19	10
	34%	35%	38%	39%	24%	24%	25%	41%	29%	33%	29%	38%	32%	29%	33%	57%	32%	40%	37%
															b				
Skilled workforce	25	6	6	5	8	9	7	10	7	5	3	2	8	12	4	1	5	9	10
	24%	19%	23%	22%	32%	36%	25%	20%	29%	24%	18%	15%	29%	27%	27%	7%	23%	19%	37%
																			b
Language and time zone	24	4	6	6	8	2	5	13	6	5	3	5	3	10	5	6	6	8	8
	23%	13%	23%	26%	32%	8%	18%	27%	25%	24%	18%	38%	11%	22%	33%	43%	27%	17%	30%
					a			a				A			a	A			
Availability of finance in the UK	23	8	4	4	7	9	6	8	5	7	6	2	11	8	1	2	5	9	6
	22%	26%	15%	17%	28%	36%	21%	16%	21%	33%	35%	15%	39%	18%	7%	14%	23%	19%	22%
						c							BC						
Transport and logistics infrastructure	21	6	8	5	2	2	6	10	4	3	5	2	4	11	3	3	5	11	2
	20%	19%	31%	22%	8%	8%	21%	20%	17%	14%	29%	15%	14%	24%	20%	21%	23%	23%	7%
			D								a								c
Exchange rates	19	4	6	4	5	5	8	8	7	6	5	5	6	9	2	2	6	8	4
	18%	13%	23%	17%	20%	20%	29%	16%	29%	29%	29%	38%	21%	20%	13%	14%	27%	17%	15%
											c								

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Top three reasons

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Tax rates & other costs	19	3	2	7	7	5	5	8	4	3	2	3	6	8	2	2	4	10	4
	18%	10%	8%	30%	28%	20%	18%	16%	17%	14%	12%	23%	21%	18%	13%	14%	18%	21%	15%
			ab	ab															
Quality of life	15	8	2	1	4	5	4	6	4	4	3	2	6	6	1	1	2	5	5
	14%	26%	8%	4%	16%	20%	14%	12%	17%	19%	18%	15%	21%	13%	7%	7%	9%	10%	19%
		bC																	
Grants or other financial incentives	14	2	5	4	3	5	4	8	4	1	1	2	5	7	1	1	2	9	2
	13%	6%	19%	17%	12%	20%	14%	16%	17%	5%	6%	15%	18%	16%	7%	7%	9%	19%	7%
Support provided to invest in UK (e.g. by UKTI)	13	6	-	4	3	5	5	9	3	6	5	3	3	6	2	1	3	8	2
	12%	19%	-	17%	12%	20%	18%	18%	13%	29%	29%	23%	11%	13%	13%	7%	14%	17%	7%
		B		B	b														
R&D and innovation capability	12	2	3	2	5	5	3	5	3	1	2	1	-	8	2	1	1	6	4
	11%	6%	12%	9%	20%	20%	11%	10%	13%	5%	12%	8%	-	18%	13%	7%	5%	13%	15%
														A	a				
Technology and communications infrastructure	9	3	2	2	2	5	3	6	2	2	2	-	3	4	1	1	2	4	2
	9%	10%	8%	9%	8%	20%	11%	12%	8%	10%	12%	-	11%	9%	7%	7%	9%	8%	7%
						g													
Don't know / prefer not to say	2	1	-	-	1	-	1	-	-	-	-	-	1	1	-	-	1	1	-
	2%	3%	-	-	4%	-	4%	-	-	-	-	-	4%	2%	-	-	5%	2%	-

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Top three reasons

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Access to UK market	42	29	1	29	2	25	5	16	10	29	1
	40%	38%	20%	39%	40%	40%	38%	31%	63%	39%	13%
									A		
Access to European market	37	31	2	28	3	26	3	17	7	30	1
	35%	40%	40%	37%	60%	41%	23%	33%	44%	41%	13%
Proximity to existing and potential clients	36	26	-	28	1	19	6	13	9	27	3
	34%	34%	-	37%	20%	30%	46%	25%	56%	36%	38%
									A		
Skilled workforce	25	19	-	19	-	13	6	15	4	16	2
	24%	25%	-	25%	-	21%	46%	29%	25%	22%	25%
							a				
Language and time zone	24	17	-	16	1	8	2	7	6	17	1
	23%	22%	-	21%	20%	13%	15%	14%	38%	23%	13%
									A		
Availability of finance in the UK	23	18	1	18	-	13	3	13	2	17	-
	22%	23%	20%	24%	-	21%	23%	25%	13%	23%	-
Transport and logistics infrastructure	21	15	1	16	1	14	2	11	2	16	2
	20%	19%	20%	21%	20%	22%	15%	22%	13%	22%	25%
Exchange rates	19	14	2	14	1	16	1	12	1	14	2
	18%	18%	40%	19%	20%	25%	8%	24%	6%	19%	25%
Tax rates & other costs	19	13	1	12	-	14	1	11	-	17	-
	18%	17%	20%	16%	-	22%	8%	22%	-	23%	-
								B			
Quality of life	15	10	1	10	1	10	2	11	1	12	-
	14%	13%	20%	13%	20%	16%	15%	22%	6%	16%	-

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q2. What are the main reasons why you chose to invest in the UK?

Top three reasons

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Grants or other financial incentives	14	10	2	7	1	6	2	3	3	7	4
	13%	13%	40%	9%	20%	10%	15%	6%	19%	9%	50%
											A
Support provided to invest in UK (e.g. by UKTI)	13	10	-	10	-	8	2	9	1	10	2
	12%	13%	-	13%	-	13%	15%	18%	6%	14%	25%
R&D and innovation capability	12	9	1	8	1	8	1	6	1	4	3
	11%	12%	20%	11%	20%	13%	8%	12%	6%	5%	38%
											A
Technology and communications infrastructure	9	7	-	7	-	6	-	6	1	6	-
	9%	9%	-	9%	-	10%	-	12%	6%	8%	-
Don't know / prefer not to say	2	1	1	1	1	1	1	1	-	-	1
	2%	1%	20%	1%	20%	2%	8%	2%	-	-	13%
			A		A						A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Questions over EU membership

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	9	3	1	4	1	2	2	5	2	4	1	1	5	1	2	2	3	2
	9%	10%	4%	17%	4%	8%	7%	10%	8%	19%	6%	8%	11%	7%	14%	9%	6%	7%
Second Reason	14	7	3	3	1	3	3	7	1	3	3	4	6	1	2	1	5	4
	13%	23%	12%	13%	4%	12%	11%	14%	4%	14%	18%	14%	13%	7%	14%	5%	10%	15%
Third Reason	10	-	1	5	4	6	3	6	5	2	3	4	4	2	-	-	7	3
	10%	-	4%	22%	16%	24%	11%	12%	21%	10%	18%	14%	9%	13%	-	-	15%	11%
Net - top 3	33	10	5	12	6	11	8	18	8	9	7	9	15	4	4	3	15	9
	31%	32%	19%	52%	24%	44%	29%	37%	33%	43%	41%	32%	33%	27%	29%	14%	31%	33%
Not given as reason	72	21	21	11	19	14	20	31	16	12	10	19	30	11	10	19	33	18
	69%	68%	81%	48%	76%	56%	71%	63%	67%	57%	59%	68%	67%	73%	71%	86%	69%	67%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Questions over EU membership

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	9	8	-	7	-	5	-	4	2	8	-
	9%	10%	-	9%	-	8%	-	8%	13%	11%	-
Second Reason	14	11	1	12	1	9	2	6	2	9	-
	13%	14%	20%	16%	20%	14%	15%	12%	13%	12%	-
Third Reason	10	9	-	7	-	3	4	3	4	5	3
	10%	12%	-	9%	-	5%	31%	6%	25%	7%	38%
							A		A		A
Net - top 3	33	28	1	26	1	17	6	13	8	22	3
	31%	36%	20%	35%	20%	27%	46%	25%	50%	30%	38%
									a		
Not given as reason	72	49	4	49	4	46	7	38	8	52	5
	69%	64%	80%	65%	80%	73%	54%	75%	50%	70%	63%
									b		

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Regulation and red tape

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	17	8	5	1	3	5	3	5	5	2	1	7	5	3	1	5	5	5
	16%	26%	19%	4%	12%	20%	11%	10%	21%	10%	6%	25%	11%	20%	7%	23%	10%	19%
		C																
Second Reason	9	3	4	2	-	2	2	5	2	3	2	2	4	-	3	4	2	3
	9%	10%	15%	9%	-	8%	7%	10%	8%	14%	12%	7%	9%	-	21%	18%	4%	11%
		D												c		b		
Third Reason	15	4	4	4	3	2	4	10	1	4	3	4	4	4	2	2	9	4
	14%	13%	15%	17%	12%	8%	14%	20%	4%	19%	18%	14%	9%	27%	14%	9%	19%	15%
							d							b				
Net - top 3	41	15	13	7	6	9	9	20	8	9	6	13	13	7	6	11	16	12
	39%	48%	50%	30%	24%	36%	32%	41%	33%	43%	35%	46%	29%	47%	43%	50%	33%	44%
		d	d															
Not given as reason	64	16	13	16	19	16	19	29	16	12	11	15	32	8	8	11	32	15
	61%	52%	50%	70%	76%	64%	68%	59%	67%	57%	65%	54%	71%	53%	57%	50%	67%	56%
				ab														

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Regulation and red tape

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Significance Level: 90%	a	b	a	b	a	b	a	b	a	b	
Significance Level: 95%	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	17	14	2	14	2	12	1	8	3	12	-
	16%	18%	40%	19%	40%	19%	8%	16%	19%	16%	-
Second Reason	9	8	-	8	-	4	1	5	2	7	-
	9%	10%	-	11%	-	6%	8%	10%	13%	9%	-
Third Reason	15	9	-	9	2	10	1	8	1	11	1
	14%	12%	-	12%	40%	16%	8%	16%	6%	15%	13%
				a							
Net - top 3	41	31	2	31	4	26	3	21	6	30	1
	39%	40%	40%	41%	80%	41%	23%	41%	38%	41%	13%
				a							
Not given as reason	64	46	3	44	1	37	10	30	10	44	7
	61%	60%	60%	59%	20%	59%	77%	59%	63%	59%	88%
				b							

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Sluggish economic recovery

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	19	5	7	6	1	4	5	7	4	5	4	1	4	10	3	1	4	10	3
	18%	16%	27%	26%	4%	16%	18%	14%	17%	24%	24%	8%	14%	22%	20%	7%	18%	21%	11%
			D	D															
Second Reason	12	3	4	1	4	3	4	8	2	4	2	4	3	3	4	2	1	7	4
	11%	10%	15%	4%	16%	12%	14%	16%	8%	19%	12%	31%	11%	7%	27%	14%	5%	15%	15%
											d				B				
Third Reason	13	5	4	2	2	3	2	7	3	1	-	2	1	5	3	3	5	4	4
	12%	16%	15%	9%	8%	12%	7%	14%	13%	5%	-	15%	4%	11%	20%	21%	23%	8%	15%
															a	a	b		
Net - top 3	44	13	15	9	7	10	11	22	9	10	6	7	8	18	10	6	10	21	11
	42%	42%	58%	39%	28%	40%	39%	45%	38%	48%	35%	54%	29%	40%	67%	43%	45%	44%	41%
			D												Ab				
Not given as reason	61	18	11	14	18	15	17	27	15	11	11	6	20	27	5	8	12	27	16
	58%	58%	42%	61%	72%	60%	61%	55%	63%	52%	65%	46%	71%	60%	33%	57%	55%	56%	59%
				B									C	c					

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Sluggish economic recovery

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	19	13	1	12	2	10	4	8	3	9	4
	18%	17%	20%	16%	40%	16%	31%	16%	19%	12%	50%
											A
Second Reason	12	11	-	11	-	9	-	6	-	11	-
	11%	14%	-	15%	-	14%	-	12%	-	15%	-
Third Reason	13	9	-	11	-	9	1	7	4	9	-
	12%	12%	-	15%	-	14%	8%	14%	25%	12%	-
Net - top 3	44	33	1	34	2	28	5	21	7	29	4
	42%	43%	20%	45%	40%	44%	38%	41%	44%	39%	50%
Not given as reason	61	44	4	41	3	35	8	30	9	45	4
	58%	57%	80%	55%	60%	56%	62%	59%	56%	61%	50%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack of knowledge about what the UK has to offer

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	2	3	-	1	3	4	1	1	1	-	2	2	1	1	3	3	-
	6%	6%	12%	-	4%	11%	8%	4%	5%	6%	-	7%	4%	7%	7%	14%	6%	-
			c													c		
Second Reason	3	2	-	1	-	1	1	1	-	-	-	1	1	-	1	-	3	-
	3%	6%	-	4%	-	4%	4%	2%	4%	-	-	4%	2%	-	7%	-	6%	-
Third Reason	2	-	-	1	1	1	1	-	1	-	-	-	2	-	-	-	1	1
	2%	-	-	4%	4%	4%	4%	-	5%	-	-	-	4%	-	-	-	2%	4%
Net - top 3	11	4	3	2	2	3	5	6	2	2	1	3	5	1	2	3	7	1
	10%	13%	12%	9%	8%	12%	18%	12%	8%	10%	6%	11%	11%	7%	14%	14%	15%	4%
Not given as reason	94	27	23	21	23	22	23	43	22	19	16	25	40	14	12	19	41	26
	90%	87%	88%	91%	92%	88%	82%	88%	92%	90%	94%	89%	89%	93%	86%	86%	85%	96%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack of knowledge about what the UK has to offer

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	6	-	6	-	6	-	4	-	6	-
	6%	8%	-	8%	-	10%	-	8%	-	8%	-
Second Reason	3	1	1	1	1	2	1	2	1	3	-
	3%	1%	20%	1%	20%	3%	8%	4%	6%	4%	-
			A		A						
Third Reason	2	1	-	2	-	2	-	2	-	2	-
	2%	1%	-	3%	-	3%	-	4%	-	3%	-
Net - top 3	11	8	1	9	1	10	1	8	1	11	-
	10%	10%	20%	12%	20%	16%	8%	16%	6%	15%	-
Not given as reason	94	69	4	66	4	53	12	43	15	63	8
	90%	90%	80%	88%	80%	84%	92%	84%	94%	85%	100%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Immigration restrictions

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	2	1	-	-	1	2	1	1	2	1	1	1	1	-	-	-	1	1
	2%	3%	-	-	4%	8%	4%	2%	8%	5%	6%	4%	2%	-	-	-	2%	4%
Second Reason	5	1	-	1	3	-	1	2	1	2	-	-	2	2	1	-	2	2
	5%	3%	-	4%	12%	-	4%	4%	4%	10%	-	-	4%	13%	7%	-	4%	7%
Third Reason	5	1	1	1	2	3	1	2	2	1	1	2	2	1	-	4	1	-
	5%	3%	4%	4%	8%	12%	4%	4%	8%	5%	6%	15%	7%	4%	7%	18%	2%	-
Net - top 3	12	3	1	2	6	5	3	5	5	4	2	3	5	3	1	4	4	3
	11%	10%	4%	9%	24%	20%	11%	10%	21%	19%	12%	23%	11%	11%	7%	18%	8%	11%
Not given as reason	93	28	25	21	19	20	25	44	19	17	15	10	25	40	12	13	44	24
	89%	90%	96%	91%	76%	80%	89%	90%	79%	81%	88%	77%	89%	89%	80%	93%	92%	89%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Immigration restrictions

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	2	2	-	2	-	2	-	2	-	2	-
	2%	3%	-	3%	-	3%	-	4%	-	3%	-
Second Reason	5	2	-	3	-	3	-	3	-	3	1
	5%	3%	-	4%	-	5%	-	6%	-	4%	13%
Third Reason	5	4	1	4	1	3	-	3	-	5	-
	5%	5%	20%	5%	20%	5%	-	6%	-	7%	-
Net - top 3	12	8	1	9	1	8	-	8	-	10	1
	11%	10%	20%	12%	20%	13%	-	16%	-	14%	13%
								b			
Not given as reason	93	69	4	66	4	55	13	43	16	64	7
	89%	90%	80%	88%	80%	87%	100%	84%	100%	86%	88%
								a			

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Falling costs in other locations

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	8	2	3	-	3	1	1	3	2	2	-	2	3	4	1	-	3	2	2
	8%	6%	12%	-	12%	4%	4%	6%	8%	10%	-	15%	11%	9%	7%	-	14%	4%	7%
			c		c														
Second Reason	10	3	3	1	3	4	3	5	3	2	2	2	4	3	1	-	4	4	1
	10%	10%	12%	4%	12%	16%	11%	10%	13%	10%	12%	15%	14%	7%	7%	-	18%	8%	4%
Third Reason	9	3	2	1	3	2	4	3	2	2	2	1	1	5	1	2	1	4	4
	9%	10%	8%	4%	12%	8%	14%	6%	8%	10%	12%	8%	4%	11%	7%	14%	5%	8%	15%
Net - top 3	27	8	8	2	9	7	8	11	7	6	4	5	8	12	3	2	8	10	7
	26%	26%	31%	9%	36%	28%	29%	22%	29%	29%	24%	38%	29%	27%	20%	14%	36%	21%	26%
			c		C														
Not given as reason	78	23	18	21	16	18	20	38	17	15	13	8	20	33	12	12	14	38	20
	74%	74%	69%	91%	64%	72%	71%	78%	71%	71%	76%	62%	71%	73%	80%	86%	64%	79%	74%
				bD															

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Falling costs in other locations

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	8	7	-	4	-	5	1	4	2	6	1
	8%	9%	-	5%	-	8%	8%	8%	13%	8%	13%
Second Reason	10	7	1	7	1	6	-	4	2	9	-
	10%	9%	20%	9%	20%	10%	-	8%	13%	12%	-
Third Reason	9	7	1	7	-	5	1	3	2	6	-
	9%	9%	20%	9%	-	8%	8%	6%	13%	8%	-
Net - top 3	27	21	2	18	1	16	2	11	6	21	1
	26%	27%	40%	24%	20%	25%	15%	22%	38%	28%	13%
Not given as reason	78	56	3	57	4	47	11	40	10	53	7
	74%	73%	60%	76%	80%	75%	85%	78%	63%	72%	88%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Access to finance

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	5	2	-	2	1	1	-	2	1	1	1	2	1	-	1	1	1	2
	5%	6%	-	9%	4%	4%	-	4%	4%	5%	6%	7%	2%	-	7%	5%	2%	7%
Second Reason	8	-	2	3	3	-	4	3	2	2	1	1	5	1	1	1	4	2
	8%	-	8%	13%	12%	-	14%	6%	13%	10%	12%	4%	11%	7%	7%	5%	8%	7%
			A	a		a		a		a								
Third Reason	9	2	3	3	1	2	3	4	1	2	4	5	3	-	1	3	4	1
	9%	6%	12%	13%	4%	8%	11%	8%	4%	10%	24%	18%	7%	-	7%	14%	8%	4%
										cd		c						
Net - top 3	22	4	5	8	5	3	7	9	5	5	7	8	9	1	3	5	9	5
	21%	13%	19%	35%	20%	12%	25%	18%	21%	24%	41%	29%	20%	7%	21%	23%	19%	19%
				a						Ac								
Not given as reason	83	27	21	15	20	22	21	40	19	16	10	20	36	14	11	17	39	22
	79%	87%	81%	65%	80%	88%	75%	82%	79%	76%	59%	71%	80%	93%	79%	77%	81%	81%
		c				F		f										

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Access to finance

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	5	3	-	2	-	2	-	1	-	4	-
	5%	4%	-	3%	-	3%	-	2%	-	5%	-
Second Reason	8	5	-	3	1	4	2	3	2	4	3
	8%	6%	-	4%	20%	6%	15%	6%	13%	5%	38%
											A
Third Reason	9	9	-	9	-	7	1	7	-	9	-
	9%	12%	-	12%	-	11%	8%	14%	-	12%	-
Net - top 3	22	17	-	14	1	13	3	11	2	17	3
	21%	22%	-	19%	20%	21%	23%	22%	13%	23%	38%
Not given as reason	83	60	5	61	4	50	10	40	14	57	5
	79%	78%	100%	81%	80%	79%	77%	78%	88%	77%	63%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack of investment into its infrastructure

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	4	-	-	2	2	2	3	2	1	1	1	1	2	-	1	-	3	1
	4%	-	-	9%	8%	8%	7%	6%	8%	5%	6%	8%	4%	4%	-	7%	-	4%
Second Reason	5	1	-	2	2	1	-	1	1	3	-	3	2	-	-	-	2	3
	5%	3%	-	9%	8%	4%	-	2%	4%	5%	18%	11%	4%	-	-	-	4%	11%
										BC								
Third Reason	4	-	1	3	-	-	-	2	2	1	1	1	1	-	2	-	2	2
	4%	-	4%	13%	-	-	-	4%	8%	5%	6%	4%	2%	-	14%	-	4%	7%
				Ad											b			
Net - top 3	13	1	1	7	4	3	2	6	5	3	5	5	5	-	3	-	7	6
	12%	3%	4%	30%	16%	12%	7%	12%	21%	14%	29%	18%	11%	-	21%	-	15%	22%
				AB							b	c		c		a	A	
Not given as reason	92	30	25	16	21	22	26	43	19	18	12	23	40	15	11	22	41	21
	88%	97%	96%	70%	84%	88%	93%	88%	79%	86%	71%	82%	89%	100%	79%	100%	85%	78%
		C	C				f							ad	bC			

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack of investment into its infrastructure

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	4	4	-	4	-	2	-	2	1	4	-
	4%	5%	-	5%	-	3%	-	4%	6%	5%	-
Second Reason	5	4	-	4	-	3	2	4	-	4	-
	5%	5%	-	5%	-	5%	15%	8%	-	5%	-
Third Reason	4	2	1	2	-	1	-	-	-	2	-
	4%	3%	20%	3%	-	2%	-	-	-	3%	-
			A								
Net - top 3	13	10	1	10	-	6	2	6	1	10	-
	12%	13%	20%	13%	-	10%	15%	12%	6%	14%	-
Not given as reason	92	67	4	65	5	57	11	45	15	64	8
	88%	87%	80%	87%	100%	90%	85%	88%	94%	86%	100%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Property costs and availability

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	13	2	4	2	5	2	3	6	2	3	4	4	5	3	1	2	6	5
	12%	6%	15%	9%	20%	8%	11%	12%	8%	14%	24%	14%	11%	20%	7%	9%	13%	19%
Second Reason	12	4	3	2	3	1	2	5	4	3	1	4	4	3	1	6	5	1
	11%	13%	12%	9%	12%	4%	7%	10%	17%	14%	6%	14%	9%	20%	7%	27%	10%	4%
Third Reason	11	7	1	-	3	3	2	5	2	2	1	2	5	2	1	1	4	3
	10%	23%	4%	-	12%	12%	7%	10%	8%	10%	6%	7%	11%	13%	7%	5%	8%	11%
Net - top 3	36	13	8	4	11	6	7	16	8	8	6	10	14	8	3	9	15	9
	34%	42%	31%	17%	44%	24%	25%	33%	33%	38%	35%	36%	31%	53%	21%	41%	31%	33%
Not given as reason	69	18	18	19	14	19	21	33	16	13	7	18	31	7	11	13	33	18
	66%	58%	69%	83%	56%	76%	75%	67%	67%	62%	54%	64%	69%	47%	79%	59%	69%	67%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Property costs and availability

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	13	10	-	11	-	10	1	8	1	11	-
	12%	13%	-	15%	-	16%	8%	16%	6%	15%	-
Second Reason	12	9	1	8	-	8	-	5	3	10	-
	11%	12%	20%	11%	-	13%	-	10%	19%	14%	-
Third Reason	11	7	-	8	-	6	2	7	1	9	1
	10%	9%	-	11%	-	10%	15%	14%	6%	12%	13%
Net - top 3	36	26	1	27	-	24	3	20	5	30	1
	34%	34%	20%	36%	-	38%	23%	39%	31%	41%	13%
Not given as reason	69	51	4	48	5	39	10	31	11	44	7
	66%	66%	80%	64%	100%	62%	77%	61%	69%	59%	88%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Overly London-centric economy

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	7	1	2	1	3	1	5	-	-	1	1	-	4	2	1	1	4	2
	7%	3%	8%	4%	12%	4%	10%	-	-	6%	8%	-	9%	13%	7%	5%	8%	7%
					d									a				
Second Reason	10	1	4	3	2	2	4	2	-	1	-	1	5	3	1	1	5	3
	10%	3%	15%	13%	8%	7%	8%	8%	-	6%	-	4%	11%	20%	7%	5%	10%	11%
					Eg									a				
Third Reason	12	5	3	1	3	2	4	3	4	1	-	7	5	-	-	3	6	1
	11%	16%	12%	4%	12%	8%	7%	8%	13%	19%	6%	25%	11%	-	-	14%	13%	4%
					CD													
Net - top 3	29	7	9	5	8	5	13	5	4	3	1	8	14	5	2	5	15	6
	28%	23%	35%	22%	32%	18%	27%	21%	19%	18%	8%	29%	31%	33%	14%	23%	31%	22%
					bG													
Not given as reason	76	24	17	18	17	23	36	19	17	14	12	20	31	10	12	17	33	21
	72%	77%	65%	78%	68%	82%	73%	79%	81%	82%	92%	71%	69%	67%	86%	77%	69%	78%
					a						A							

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Overly London-centric economy

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	7	3	1	4	-	4	1	4	-	5	1
	7%	4%	20%	5%	-	6%	8%	8%	-	7%	13%
Second Reason	10	8	-	9	-	6	2	4	2	6	2
	10%	10%	-	12%	-	10%	15%	8%	13%	8%	25%
Third Reason	12	11	-	9	-	10	1	8	1	11	-
	11%	14%	-	12%	-	16%	8%	16%	6%	15%	-
Net - top 3	29	22	1	22	-	20	4	16	3	22	3
	28%	29%	20%	29%	-	32%	31%	31%	19%	30%	38%
Not given as reason	76	55	4	53	5	43	9	35	13	52	5
	72%	71%	80%	71%	100%	68%	69%	69%	81%	70%	63%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack of skills

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	3	1	-	2	-	1	1	2	2	-	-	-	2	-	1	-	3	-
	3%	3%	-	9%	-	4%	4%	4%	8%	-	-	-	4%	-	7%	-	6%	-
Second Reason	2	-	-	2	-	1	1	2	-	-	-	1	1	-	-	-	2	-
	2%	-	-	9%	-	4%	4%	4%	-	-	-	4%	2%	-	-	-	4%	-
Third Reason	3	-	1	-	2	-	3	-	1	-	1	-	3	-	-	-	2	1
	3%	-	4%	-	8%	-	11%	-	4%	-	6%	-	7%	-	-	-	4%	4%
						aC				c								
Net - top 3	8	1	1	4	2	2	5	4	3	-	1	1	6	-	1	-	7	1
	8%	3%	4%	17%	8%	8%	18%	8%	13%	-	6%	4%	13%	-	7%	-	15%	4%
				a		E										a		
Not given as reason	97	30	25	19	23	23	23	45	21	21	16	27	39	15	13	22	41	26
	92%	97%	96%	83%	92%	92%	82%	92%	88%	100%	94%	96%	87%	100%	93%	100%	85%	96%
		c							B							b		

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack of skills

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	3	1	-	1	-	1	2	1	2	2	1
	3%	1%	-	1%	-	2%	15%	2%	13%	3%	13%
							A		a		
Second Reason	2	2	-	1	-	2	-	1	-	2	-
	2%	3%	-	1%	-	3%	-	2%	-	3%	-
Third Reason	3	2	1	2	1	3	-	2	-	1	-
	3%	3%	20%	3%	20%	5%	-	4%	-	1%	-
			A		a						
Net - top 3	8	5	1	4	1	6	2	4	2	5	1
	8%	6%	20%	5%	20%	10%	15%	8%	13%	7%	13%
Not given as reason	97	72	4	71	4	57	11	47	14	69	7
	92%	94%	80%	95%	80%	90%	85%	92%	88%	93%	88%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack financial incentives to locate there

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	2	-	2	2	4	3	-	1	2	-	2	2	1	1	-	4	2
	6%	6%	-	9%	8%	14%	6%	-	5%	12%	-	7%	4%	7%	7%	-	8%	7%
						d				d								
Second Reason	9	3	2	1	3	3	4	3	1	1	1	3	6	-	-	3	4	2
	9%	10%	8%	4%	12%	11%	8%	13%	5%	6%	8%	11%	13%	-	-	14%	8%	7%
Third Reason	7	2	4	1	-	1	3	1	1	-	-	-	4	2	1	2	1	2
	7%	6%	15%	4%	-	4%	6%	4%	5%	-	-	-	9%	13%	7%	9%	2%	7%
			D											a				
Net - top 3	22	7	6	4	5	8	10	4	3	3	1	5	12	3	2	5	9	6
	21%	23%	23%	17%	20%	29%	20%	17%	14%	18%	8%	18%	27%	20%	14%	23%	19%	22%
Not given as reason	83	24	20	19	20	20	39	20	18	14	12	23	33	12	12	17	39	21
	79%	77%	77%	83%	80%	71%	80%	83%	86%	82%	92%	82%	73%	80%	86%	77%	81%	78%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Lack financial incentives to locate there

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	6	4	-	5	-	3	1	3	1	4	-
	6%	5%	-	7%	-	5%	8%	6%	6%	5%	-
Second Reason	9	6	-	5	-	5	1	6	1	4	1
	9%	8%	-	7%	-	8%	8%	12%	6%	5%	13%
Third Reason	7	5	-	3	-	3	-	-	2	3	2
	7%	6%	-	4%	-	5%	-	-	13%	4%	25%
									A		A
Net - top 3	22	15	-	13	-	11	2	9	4	11	3
	21%	19%	-	17%	-	17%	15%	18%	25%	15%	38%
Not given as reason	83	62	5	62	5	52	11	42	12	63	5
	79%	81%	100%	83%	100%	83%	85%	82%	75%	85%	63%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Other

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
First Reason	1	-	-	-	1	-	-	1	-	-	-	1	-	-	-	1	-	-	1
	1%	-	-	-	4%	-	-	2%	-	-	-	8%	-	-	-	7%	-	-	4%
															b				
Second Reason	1	1	-	-	-	-	-	-	-	-	1	-	1	-	-	-	-	1	
	1%	3%	-	-	-	-	-	-	-	-	8%	-	2%	-	-	-	-	4%	
											c								
Third Reason	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Net - top 3	2	1	-	-	1	-	-	1	-	-	2	-	1	-	1	-	-	2	
	2%	3%	-	-	4%	-	-	2%	-	-	15%	-	2%	-	7%	-	-	7%	
											aBcde							b	
Not given as reason	103	30	26	23	24	25	28	48	24	21	17	11	28	44	15	13	22	48	25
	98%	97%	100%	100%	96%	100%	100%	98%	100%	100%	100%	85%	100%	98%	100%	93%	100%	100%	93%
						g	G	g	g	g								c	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Other

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
Total	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
First Reason	1	-	-	1	-	-	-	1	-	-	-
	1%	-	-	1%	-	-	-	2%	-	-	-
Second Reason	1	1	-	1	-	1	-	1	-	1	-
	1%	1%	-	1%	-	2%	-	2%	-	1%	-
Third Reason	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Net - top 3	2	1	-	2	-	1	-	2	-	1	-
	2%	1%	-	3%	-	2%	-	4%	-	1%	-
Not given as reason	103	76	5	73	5	62	13	49	16	73	8
	98%	99%	100%	97%	100%	98%	100%	96%	100%	99%	100%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

First reason

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sluggish economic recovery	19	5	7	6	1	4	5	7	4	5	4	4	10	3	1	4	10	3
	18%	16%	27%	26%	4%	16%	18%	14%	17%	24%	24%	14%	22%	20%	7%	18%	21%	11%
			D	D														
Regulation and red tape	17	8	5	1	3	5	3	5	5	2	1	7	5	3	1	5	5	5
	16%	26%	19%	4%	12%	20%	11%	10%	21%	10%	6%	25%	11%	20%	7%	23%	10%	19%
		C																
Property costs and availability	13	2	4	2	5	2	3	6	2	3	4	4	5	3	1	2	6	5
	12%	6%	15%	9%	20%	8%	11%	12%	8%	14%	24%	14%	11%	20%	7%	9%	13%	19%
Questions over EU membership	9	3	1	4	1	2	2	5	2	4	1	1	5	1	2	2	3	2
	9%	10%	4%	17%	4%	8%	7%	10%	8%	19%	6%	4%	11%	7%	14%	9%	6%	7%
Falling costs in other locations	8	2	3	-	3	1	1	3	2	2	-	3	4	1	-	3	2	2
	8%	6%	12%	-	12%	4%	4%	6%	8%	10%	-	11%	9%	7%	-	14%	4%	7%
			c	c														
Overly London-centric economy	7	1	2	1	3	3	1	5	-	-	1	-	4	2	1	1	4	2
	7%	3%	8%	4%	12%	12%	4%	10%	-	-	6%	-	9%	13%	7%	5%	8%	7%
					d									a				
Lack of knowledge about what the UK has to offer	6	2	3	-	1	1	3	4	1	1	1	2	2	1	1	3	3	-
	6%	6%	12%	-	4%	4%	11%	8%	4%	5%	6%	7%	4%	7%	7%	14%	6%	-
			c													c		
Lack financial incentives to locate there	6	2	-	2	2	1	4	3	-	1	2	2	2	1	1	-	4	2
	6%	6%	-	9%	8%	4%	14%	6%	-	5%	12%	7%	4%	7%	7%	-	8%	7%
					d					d								
Access to finance	5	2	-	2	1	1	-	2	1	1	1	2	1	-	1	1	1	2
	5%	6%	-	9%	4%	4%	-	4%	4%	5%	6%	7%	2%	-	7%	5%	2%	7%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

First reason

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Lack of investment into its infrastructure	4	-	-	2	2	2	2	3	2	1	1	1	2	-	1	-	3	1	
	4%	-	-	9%	8%	8%	7%	6%	8%	5%	6%	8%	4%	4%	7%	-	6%	4%	
Lack of skills	3	1	-	2	-	1	1	2	2	-	-	-	2	-	1	-	3	-	
	3%	3%	-	9%	-	4%	4%	4%	8%	-	-	-	4%	-	7%	-	6%	-	
Immigration restrictions	2	1	-	-	1	2	1	1	2	1	1	1	1	-	-	-	1	1	
	2%	3%	-	-	4%	8%	4%	2%	8%	5%	6%	8%	4%	2%	-	-	2%	4%	
Other	1	-	-	-	1	-	-	1	-	-	-	1	-	-	1	-	-	1	
	1%	-	-	-	4%	-	-	2%	-	-	-	8%	-	-	7%	-	-	4%	
															b				
Don't know / prefer not to say	5	2	1	1	1	-	2	2	1	-	-	1	1	2	2	1	3	1	
	5%	6%	4%	4%	4%	-	7%	4%	4%	-	-	8%	4%	4%	14%	5%	6%	4%	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

First reason

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sluggish economic recovery	19	13	1	12	2	10	4	8	3	9	4
	18%	17%	20%	16%	40%	16%	31%	16%	19%	12%	50%
											A
Regulation and red tape	17	14	2	14	2	12	1	8	3	12	-
	16%	18%	40%	19%	40%	19%	8%	16%	19%	16%	-
Property costs and availability	13	10	-	11	-	10	1	8	1	11	-
	12%	13%	-	15%	-	16%	8%	16%	6%	15%	-
Questions over EU membership	9	8	-	7	-	5	-	4	2	8	-
	9%	10%	-	9%	-	8%	-	8%	13%	11%	-
Falling costs in other locations	8	7	-	4	-	5	1	4	2	6	1
	8%	9%	-	5%	-	8%	8%	8%	13%	8%	13%
Overly London-centric economy	7	3	1	4	-	4	1	4	-	5	1
	7%	4%	20%	5%	-	6%	8%	8%	-	7%	13%
Lack of knowledge about what the UK has to offer	6	6	-	6	-	6	-	4	-	6	-
	6%	8%	-	8%	-	10%	-	8%	-	8%	-
Lack financial incentives to locate there	6	4	-	5	-	3	1	3	1	4	-
	6%	5%	-	7%	-	5%	8%	6%	6%	5%	-
Access to finance	5	3	-	2	-	2	-	1	-	4	-
	5%	4%	-	3%	-	3%	-	2%	-	5%	-
Lack of investment into its infrastructure	4	4	-	4	-	2	-	2	1	4	-
	4%	5%	-	5%	-	3%	-	4%	6%	5%	-
Lack of skills	3	1	-	1	-	1	2	1	2	2	1
	3%	1%	-	1%	-	2%	15%	2%	13%	3%	13%
							A		a		

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

First reason

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

Total

Immigration restrictions

Other

Don't know / prefer not to say

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant	
	a	b	a	b	a	b	a	b	a	b	
	A	B	A	B	A	B	A	B	A	B	
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Immigration restrictions	2	2	-	2	-	2	-	2	-	2	-
	2%	3%	-	3%	-	3%	-	4%	-	3%	-
Other	1	-	-	1	-	-	-	1	-	-	-
	1%	-	-	1%	-	-	-	2%	-	-	-
Don't know / prefer not to say	5	2	1	2	1	1	2	1	1	1	1
	5%	3%	20%	3%	20%	2%	15%	2%	6%	1%	13%
			A		a		A				a

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Top three reasons

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sluggish economic recovery	44	13	15	9	7	10	11	22	9	10	6	8	18	10	6	10	21	11
	42%	42%	58%	39%	28%	40%	39%	45%	38%	48%	35%	29%	40%	67%	43%	45%	44%	41%
			D											Ab				
Regulation and red tape	41	15	13	7	6	9	9	20	8	9	6	13	13	7	6	11	16	12
	39%	48%	50%	30%	24%	36%	32%	41%	33%	43%	35%	46%	29%	47%	43%	50%	33%	44%
		d	d															
Property costs and availability	36	13	8	4	11	6	7	16	8	8	6	10	14	8	3	9	15	9
	34%	42%	31%	17%	44%	24%	25%	33%	33%	38%	35%	36%	31%	53%	21%	41%	31%	33%
		c		c										d				
Questions over EU membership	33	10	5	12	6	11	8	18	8	9	7	9	15	4	4	3	15	9
	31%	32%	19%	52%	24%	44%	29%	37%	33%	43%	41%	32%	33%	27%	29%	14%	31%	33%
			BD															
Overly London-centric economy	29	7	9	5	8	10	5	13	5	4	3	8	14	5	2	5	15	6
	28%	23%	35%	22%	32%	40%	18%	27%	21%	19%	18%	29%	31%	33%	14%	23%	31%	22%
					bG													
Falling costs in other locations	27	8	8	2	9	7	8	11	7	6	4	8	12	3	2	8	10	7
	26%	26%	31%	9%	36%	28%	29%	22%	29%	29%	24%	29%	27%	20%	14%	36%	21%	26%
			c		C													
Access to finance	22	4	5	8	5	3	7	9	5	5	7	8	9	1	3	5	9	5
	21%	13%	19%	35%	20%	12%	25%	18%	21%	24%	41%	29%	20%	7%	21%	23%	19%	19%
			a							Ac								
Lack financial incentives to locate there	22	7	6	4	5	6	8	10	4	3	3	5	12	3	2	5	9	6
	21%	23%	23%	17%	20%	24%	29%	20%	17%	14%	18%	18%	27%	20%	14%	23%	19%	22%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Top three reasons

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Lack of investment into its infrastructure	13	1	1	7	4	3	2	6	5	3	5	1	5	5	-	3	-	7	6
	12%	3%	4%	30%	16%	12%	7%	12%	21%	14%	29%	8%	18%	11%	-	21%	-	15%	22%
			AB							b			c		c		a	A	
Immigration restrictions	12	3	1	2	6	5	3	5	5	4	2	3	3	5	3	1	4	4	3
	11%	10%	4%	9%	24%	20%	11%	10%	21%	19%	12%	23%	11%	11%	20%	7%	18%	8%	11%
				B															
Lack of knowledge about what the UK has to offer	11	4	3	2	2	3	5	6	2	2	1	-	3	5	1	2	3	7	1
	10%	13%	12%	9%	8%	12%	18%	12%	8%	10%	6%	-	11%	11%	7%	14%	14%	15%	4%
Lack of skills	8	1	1	4	2	2	5	4	3	-	1	-	1	6	-	1	-	7	1
	8%	3%	4%	17%	8%	8%	18%	8%	13%	-	6%	-	4%	13%	-	7%	-	15%	4%
			a				E										a		
Other	2	1	-	-	1	-	-	1	-	-	-	2	-	1	-	1	-	-	2
	2%	3%	-	-	4%	-	-	2%	-	-	-	15%	-	2%	-	7%	-	-	7%
											aBcde							b	
Don't know / prefer not to say	5	2	1	1	1	-	2	2	1	-	-	1	1	2	-	2	1	3	1
	5%	6%	4%	4%	4%	-	7%	4%	4%	-	-	8%	4%	4%	-	14%	5%	6%	4%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Top three reasons

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sluggish economic recovery	44	33	1	34	2	28	5	21	7	29	4
	42%	43%	20%	45%	40%	44%	38%	41%	44%	39%	50%
Regulation and red tape	41	31	2	31	4	26	3	21	6	30	1
	39%	40%	40%	41%	80%	41%	23%	41%	38%	41%	13%
				a							
Property costs and availability	36	26	1	27	-	24	3	20	5	30	1
	34%	34%	20%	36%	-	38%	23%	39%	31%	41%	13%
Questions over EU membership	33	28	1	26	1	17	6	13	8	22	3
	31%	36%	20%	35%	20%	27%	46%	25%	50%	30%	38%
								a			
Overly London-centric economy	29	22	1	22	-	20	4	16	3	22	3
	28%	29%	20%	29%	-	32%	31%	31%	19%	30%	38%
Falling costs in other locations	27	21	2	18	1	16	2	11	6	21	1
	26%	27%	40%	24%	20%	25%	15%	22%	38%	28%	13%
Access to finance	22	17	-	14	1	13	3	11	2	17	3
	21%	22%	-	19%	20%	21%	23%	22%	13%	23%	38%
Lack financial incentives to locate there	22	15	-	13	-	11	2	9	4	11	3
	21%	19%	-	17%	-	17%	15%	18%	25%	15%	38%
Lack of investment into its infrastructure	13	10	1	10	-	6	2	6	1	10	-
	12%	13%	20%	13%	-	10%	15%	12%	6%	14%	-
Immigration restrictions	12	8	1	9	1	8	-	8	-	10	1
	11%	10%	20%	12%	20%	13%	-	16%	-	14%	13%
								b			

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q3. What do you feel are the biggest threats to the UK's attractiveness as an investment destination?

Top three reasons

Base: All Respondents

Significance Level: 90%

Significance Level: 95%

Total

Lack of knowledge about what the UK has to offer

Lack of skills

Other

Don't know / prefer not to say

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness	
	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Total	a	b	a	b	a	b	a	b	a	b
	A	B	A	B	A	B	A	B	A	B
105	77	5	75	5	63	13	51	16	74	8
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
11	8	1	9	1	10	1	8	1	11	-
10%	10%	20%	12%	20%	16%	8%	16%	6%	15%	-
8	5	1	4	1	6	2	4	2	5	1
8%	6%	20%	5%	20%	10%	15%	8%	13%	7%	13%
2	1	-	2	-	1	-	2	-	1	-
2%	1%	-	3%	-	2%	-	4%	-	1%	-
5	2	1	2	1	1	2	1	1	1	1
5%	3%	20%	3%	20%	2%	15%	2%	6%	1%	13%
		A		a		A				a

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

The UK must invest more in large transport projects to remain competitive in the future

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	18	10	4	2	2	7	5	8	5	7	4	9	5	1	3	3	11	2
	17%	32%	15%	9%	8%	28%	18%	16%	21%	33%	24%	32%	11%	7%	21%	14%	23%	7%
		CD										Bc				c		
Slightly agree	41	11	11	8	11	10	11	18	8	8	8	11	16	5	6	9	19	10
	39%	35%	42%	35%	44%	40%	39%	37%	33%	38%	47%	39%	36%	33%	43%	41%	40%	37%
Neither agree nor disagree	30	4	9	8	9	6	11	14	6	4	3	3	15	8	4	7	12	10
	29%	13%	35%	35%	36%	24%	39%	29%	25%	19%	18%	11%	33%	53%	29%	32%	25%	37%
		a	a	A									A	A				
Slightly disagree	14	5	2	4	3	2	1	8	5	1	2	5	7	1	1	3	4	5
	13%	16%	8%	17%	12%	8%	4%	16%	21%	5%	12%	18%	16%	7%	7%	14%	8%	19%
								b	b									
Strongly disagree	1	-	-	1	-	-	-	1	-	-	-	-	1	-	-	-	1	-
	1%	-	-	4%	-	-	-	2%	-	-	-	-	2%	-	-	-	2%	-
Don't know	1	1	-	-	-	-	-	-	-	1	-	-	1	-	-	-	1	-
	1%	3%	-	-	-	-	-	-	-	5%	-	-	2%	-	-	-	2%	-
Nets																		
Agree	59	21	15	10	13	17	16	26	13	15	12	20	21	6	9	12	30	12
	56%	68%	58%	43%	52%	68%	57%	53%	54%	71%	71%	71%	47%	40%	64%	55%	63%	44%
		c										Bc						
Disagree	15	5	2	5	3	2	1	9	5	1	2	5	8	1	1	3	5	5
	14%	16%	8%	22%	12%	8%	4%	18%	21%	5%	12%	18%	18%	7%	7%	14%	10%	19%
								b	b									

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

The UK must invest more in large transport projects to remain competitive in the future

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	18	17	1	17	1	15	-	17	-	17	-
	17%	22%	20%	23%	20%	24%	-	33%	-	23%	-
						b		B			
Slightly agree	41	36	-	31	1	31	1	21	7	34	1
	39%	47%	-	41%	20%	49%	8%	41%	44%	46%	13%
		B				B				b	
Neither agree nor disagree	30	13	3	18	1	12	6	8	4	14	4
	29%	17%	60%	24%	20%	19%	46%	16%	25%	19%	50%
			A				A			A	
Slightly disagree	14	10	1	8	1	4	5	5	5	8	2
	13%	13%	20%	11%	20%	6%	38%	10%	31%	11%	25%
						A		A			
Strongly disagree	1	-	-	-	1	-	1	-	-	-	1
	1%	-	-	-	20%	-	8%	-	-	-	13%
					A		A				A
Don't know	1	1	-	1	-	1	-	-	-	1	-
	1%	1%	-	1%	-	2%	-	-	-	1%	-
Nets											
Agree	59	53	1	48	2	46	1	38	7	51	1
	56%	69%	20%	64%	40%	73%	8%	75%	44%	69%	13%
		B				B		B		B	
Disagree	15	10	1	8	2	4	6	5	5	8	3
	14%	13%	20%	11%	40%	6%	46%	10%	31%	11%	38%
					a		A		A		A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

The UK risks falling behind as an investment destination because of a lack of direct air links between its regions and important markets

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	15	6	2	3	4	3	5	5	4	4	1	9	4	1	1	4	7	4
	14%	19%	8%	13%	16%	12%	18%	10%	17%	19%	6%	32%	9%	7%	7%	18%	15%	15%
												Bcd						
Slightly agree	33	9	9	8	7	11	8	19	6	6	6	9	17	3	3	7	15	8
	31%	29%	35%	35%	28%	44%	29%	39%	25%	29%	35%	32%	38%	20%	21%	32%	31%	30%
Neither agree nor disagree	32	8	5	8	11	7	9	12	7	6	5	6	11	6	8	5	13	11
	30%	26%	19%	35%	44%	28%	32%	24%	29%	29%	38%	21%	24%	40%	57%	23%	27%	41%
				b										AB				
Slightly disagree	16	5	6	2	3	3	6	9	4	3	5	3	8	3	1	5	8	3
	15%	16%	23%	9%	12%	12%	21%	18%	17%	14%	29%	11%	18%	20%	7%	23%	17%	11%
Strongly disagree	8	3	3	2	-	1	-	3	3	2	-	1	5	2	-	-	5	1
	8%	10%	12%	9%	-	4%	-	6%	13%	10%	-	4%	11%	13%	-	-	10%	4%
			d						b									
Don't know	1	-	1	-	-	-	-	1	-	-	-	-	-	-	1	1	-	-
	1%	-	4%	-	-	-	-	2%	-	-	-	-	-	-	7%	5%	-	-
			b															
Nets																		
Agree	48	15	11	11	11	14	13	24	10	10	7	18	21	4	4	11	22	12
	46%	48%	42%	48%	44%	56%	46%	49%	42%	48%	41%	64%	47%	27%	29%	50%	46%	44%
												CD						
Disagree	24	8	9	4	3	4	6	12	7	5	5	4	13	5	1	5	13	4
	23%	26%	35%	17%	12%	16%	21%	24%	29%	24%	29%	14%	29%	33%	7%	23%	27%	15%
			d											d				

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

The UK risks falling behind as an investment destination because of a lack of direct air links between its regions and important markets

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	15	13	1	14	1	14	1	14	1	12	-
	14%	17%	20%	19%	20%	22%	8%	27%	6%	16%	-
								b			
Slightly agree	33	27	1	23	1	22	3	15	7	25	2
	31%	35%	20%	31%	20%	35%	23%	29%	44%	34%	25%
Neither agree nor disagree	32	20	1	21	1	16	3	14	2	20	1
	30%	26%	20%	28%	20%	25%	23%	27%	13%	27%	13%
Slightly disagree	16	9	2	11	1	5	5	4	5	11	3
	15%	12%	40%	15%	20%	8%	38%	8%	31%	15%	38%
			a					A	A		
Strongly disagree	8	7	-	5	1	5	1	3	1	5	2
	8%	9%	-	7%	20%	8%	8%	6%	6%	7%	25%
										a	
Don't know	1	1	-	1	-	1	-	1	-	1	-
	1%	1%	-	1%	-	2%	-	2%	-	1%	-
Nets											
Agree	48	40	2	37	2	36	4	29	8	37	2
	46%	52%	40%	49%	40%	57%	31%	57%	50%	50%	25%
						b					
Disagree	24	16	2	16	2	10	6	7	6	16	5
	23%	21%	40%	21%	40%	16%	46%	14%	38%	22%	63%
						A		A		A	

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

HS2 (High speed railway linking London with the Midlands and Northern UK) will make the UK more attractive as an investment destination

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
Significance Level: 90%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Significance Level: 95%																			
Strongly agree	22 21%	7 23%	5 19%	5 22%	5 20%	7 28%	8 29%	11 22%	6 25%	7 33%	4 24%	4 31%	11 39%	5 11%	- -	6 43%	7 32%	12 25%	3 11%
													BC		BC	c			
Slightly agree	38 36%	12 39%	11 42%	6 26%	9 36%	7 28%	7 25%	18 37%	8 33%	5 24%	3 18%	4 31%	5 18%	22 49%	6 40%	4 29%	7 32%	20 42%	7 26%
														A					
Neither agree nor disagree	34 32%	11 35%	8 31%	8 35%	7 28%	8 32%	9 32%	15 31%	9 38%	7 33%	6 35%	4 31%	7 25%	13 29%	8 53%	4 29%	6 27%	11 23%	14 52%
															ab				
Slightly disagree	10 10%	1 3%	2 8%	3 13%	4 16%	3 12%	3 11%	4 8%	1 4%	1 5%	3 18%	- -	5 18%	4 9%	1 7%	- -	2 9%	4 8%	3 11%
Strongly disagree	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Don't know	1 1%	- -	- -	1 4%	- -	- -	1 4%	1 2%	- -	1 5%	1 6%	1 8%	- -	1 2%	- -	- -	- -	1 2%	- -
Nets																			
Agree	60 57%	19 61%	16 62%	11 48%	14 56%	14 56%	15 54%	29 59%	14 58%	12 57%	7 41%	8 62%	16 57%	27 60%	6 40%	10 71%	14 64%	32 67%	10 37%
																	c	C	
Disagree	10 10%	1 3%	2 8%	3 13%	4 16%	3 12%	3 11%	4 8%	1 4%	1 5%	3 18%	- -	5 18%	4 9%	1 7%	- -	2 9%	4 8%	3 11%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

HS2 (High speed railway linking London with the Midlands and Northern UK) will make the UK more attractive as an investment destination

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	22	21	-	21	-	19	-	20	1	21	-
	21%	27%	-	28%	-	30%	-	39%	6%	28%	-
						B		B		b	
Slightly agree	38	31	2	30	2	30	1	20	5	31	-
	36%	40%	40%	40%	40%	48%	8%	39%	31%	42%	-
						B				B	
Neither agree nor disagree	34	19	-	21	1	11	7	10	6	18	4
	32%	25%	-	28%	20%	17%	54%	20%	38%	24%	50%
						A					
Slightly disagree	10	5	3	2	2	3	4	1	3	4	3
	10%	6%	60%	3%	40%	5%	31%	2%	19%	5%	38%
			A		A		A		A		A
Strongly disagree	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Don't know	1	1	-	1	-	-	1	-	1	-	1
	1%	1%	-	1%	-	-	8%	-	6%	-	13%
						A			a		A
Nets											
Agree	60	52	2	51	2	49	1	40	6	52	-
	57%	68%	40%	68%	40%	78%	8%	78%	38%	70%	-
						B		B		B	
Disagree	10	5	3	2	2	3	4	1	3	4	3
	10%	6%	60%	3%	40%	5%	31%	2%	19%	5%	38%
			A		A		A		A		A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

I rely on rail links to grow my business, and need better connections in the UK in order to invest further here

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/ Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Strongly agree	14	7	1	4	2	4	3	9	2	5	1	2	5	6	1	2	3	9	2
	13%	23%	4%	17%	8%	16%	11%	18%	8%	24%	6%	15%	18%	13%	7%	14%	14%	19%	7%
		B																	
Slightly agree	33	12	8	4	9	11	11	17	8	7	6	4	11	16	3	3	6	16	9
	31%	39%	31%	17%	36%	44%	39%	35%	33%	33%	35%	31%	39%	36%	20%	21%	27%	33%	33%
		c																	
Neither agree nor disagree	39	8	7	12	12	8	11	13	10	7	6	4	9	16	8	4	7	18	9
	37%	26%	27%	52%	48%	32%	39%	27%	42%	33%	35%	31%	32%	36%	53%	29%	32%	38%	33%
				ab	a														
Slightly disagree	10	2	5	2	1	1	2	4	1	1	3	1	2	4	2	2	3	3	3
	10%	6%	19%	9%	4%	4%	7%	8%	4%	5%	18%	8%	7%	9%	13%	14%	14%	6%	11%
			d																
Strongly disagree	7	1	5	1	-	1	1	4	2	1	1	1	1	2	1	2	3	2	2
	7%	3%	19%	4%	-	4%	4%	8%	8%	5%	6%	8%	4%	4%	7%	14%	14%	4%	7%
			aD																
Don't know	2	1	-	-	1	-	-	2	1	-	-	1	-	1	-	1	-	-	2
	2%	3%	-	-	4%	-	-	4%	4%	-	-	8%	-	2%	-	7%	-	-	7%
																			b
Nets																			
Agree	47	19	9	8	11	15	14	26	10	12	7	6	16	22	4	5	9	25	11
	45%	61%	35%	35%	44%	60%	50%	53%	42%	57%	41%	46%	57%	49%	27%	36%	41%	52%	41%
		Bc																	
Disagree	17	3	10	3	1	2	3	8	3	2	4	2	3	6	3	4	6	5	5
	16%	10%	38%	13%	4%	8%	11%	16%	13%	10%	24%	15%	11%	13%	20%	29%	27%	10%	19%
			AcD																b

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

I rely on rail links to grow my business, and need better connections in the UK in order to invest further here

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	14	14	-	12	-	13	-	10	1	14	-
	13%	18%	-	16%	-	21%	-	20%	6%	19%	-
						b					
Slightly agree	33	28	1	30	1	25	3	24	4	26	1
	31%	36%	20%	40%	20%	40%	23%	47%	25%	35%	13%
Neither agree nor disagree	39	24	2	18	2	17	5	12	7	22	6
	37%	31%	40%	24%	40%	27%	38%	24%	44%	30%	75%
										A	
Slightly disagree	10	5	2	6	2	4	3	1	3	6	1
	10%	6%	40%	8%	40%	6%	23%	2%	19%	8%	13%
			A		A		a		A		
Strongly disagree	7	5	-	7	-	3	2	2	1	5	-
	7%	6%	-	9%	-	5%	15%	4%	6%	7%	-
Don't know	2	1	-	2	-	1	-	2	-	1	-
	2%	1%	-	3%	-	2%	-	4%	-	1%	-
Nets											
Agree	47	42	1	42	1	38	3	34	5	40	1
	45%	55%	20%	56%	20%	60%	23%	67%	31%	54%	13%
						B		B		B	
Disagree	17	10	2	13	2	7	5	3	4	11	1
	16%	13%	40%	17%	40%	11%	38%	6%	25%	15%	13%
							A		A		

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

I rely on air links to grow my business, and need direct routes to different parts of the UK outside London in order to invest further here

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	23	11	6	1	5	8	7	11	5	7	4	11	6	2	4	4	13	5
	22%	35%	23%	4%	20%	32%	25%	22%	21%	33%	24%	39%	13%	13%	29%	18%	27%	19%
		C	c									Bc						
Slightly agree	33	9	7	9	8	8	7	13	12	7	7	10	14	4	3	5	15	9
	31%	29%	27%	39%	32%	32%	25%	27%	50%	33%	41%	36%	31%	27%	21%	23%	31%	33%
									bc									
Neither agree nor disagree	34	7	11	9	7	7	12	13	5	5	4	6	16	7	4	11	13	9
	32%	23%	42%	39%	28%	28%	43%	27%	21%	24%	24%	21%	36%	47%	29%	50%	27%	33%
							d							a		b		
Slightly disagree	10	2	1	4	3	2	2	8	1	2	1	1	7	2	-	1	6	1
	10%	6%	4%	17%	12%	8%	7%	16%	4%	10%	6%	4%	16%	13%	-	5%	13%	4%
Strongly disagree	3	1	1	-	1	-	-	2	-	-	1	-	1	-	2	1	1	1
	3%	3%	4%	-	4%	-	-	4%	-	-	6%	-	2%	-	14%	5%	2%	4%
														Ab				
Don't know	2	1	-	-	1	-	-	2	1	-	1	-	1	-	1	-	-	2
	2%	3%	-	-	4%	-	-	4%	4%	-	8%	-	2%	-	7%	-	-	7%
																		b
Nets																		
Agree	56	20	13	10	13	16	14	24	17	14	11	21	20	6	7	9	28	14
	53%	65%	50%	43%	52%	64%	50%	49%	71%	67%	65%	75%	44%	40%	50%	41%	58%	52%
									c			BC						
Disagree	13	3	2	4	4	2	2	10	1	2	2	1	8	2	2	2	7	2
	12%	10%	8%	17%	16%	8%	7%	20%	4%	10%	12%	4%	18%	13%	14%	9%	15%	7%
								d					a					

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

I rely on air links to grow my business, and need direct routes to different parts of the UK outside London in order to invest further here

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	23	21	1	22	1	22	-	21	1	22	-
	22%	27%	20%	29%	20%	35%	-	41%	6%	30%	-
						B		B		b	
Slightly agree	33	27	1	25	1	24	4	16	4	26	2
	31%	35%	20%	33%	20%	38%	31%	31%	25%	35%	25%
Neither agree nor disagree	34	19	3	21	2	13	5	10	5	18	2
	32%	25%	60%	28%	40%	21%	38%	20%	31%	24%	25%
			a								
Slightly disagree	10	7	-	4	1	3	3	1	5	4	4
	10%	9%	-	5%	20%	5%	23%	2%	31%	5%	50%
							A		A		A
Strongly disagree	3	2	-	1	-	-	1	1	1	3	-
	3%	3%	-	1%	-	-	8%	2%	6%	4%	-
							A				
Don't know	2	1	-	2	-	1	-	2	-	1	-
	2%	1%	-	3%	-	2%	-	4%	-	1%	-
Nets											
Agree	56	48	2	47	2	46	4	37	5	48	2
	53%	62%	40%	63%	40%	73%	31%	73%	31%	65%	25%
						B		B		B	
Disagree	13	9	-	5	1	3	4	2	6	7	4
	12%	12%	-	7%	20%	5%	31%	4%	38%	9%	50%
							A		A		A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Current media and political criticism of businesses around tax, transparency and bonuses is reducing the UK's attractiveness as an investment destination

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	19	10	2	3	4	6	6	7	3	6	4	9	6	2	2	5	9	3
	18%	32%	8%	13%	16%	24%	21%	14%	13%	29%	24%	32%	13%	13%	14%	23%	19%	11%
		B										b						
Slightly agree	35	10	9	9	7	10	12	18	7	8	7	9	15	5	4	4	23	6
	33%	32%	35%	39%	28%	40%	43%	37%	29%	38%	41%	32%	33%	33%	29%	18%	48%	22%
																AC		
Neither agree nor disagree	34	4	13	8	9	5	8	16	8	4	3	6	15	7	6	9	8	14
	32%	13%	50%	35%	36%	20%	29%	33%	33%	19%	18%	21%	33%	47%	43%	41%	17%	52%
			A	a	A									a		B		B
Slightly disagree	16	7	1	3	5	4	2	8	5	3	3	4	9	1	2	3	8	4
	15%	23%	4%	13%	20%	16%	7%	16%	21%	14%	18%	14%	20%	7%	14%	14%	17%	15%
		B		b														
Strongly disagree	1	-	1	-	-	-	-	-	1	-	-	-	-	-	-	1	-	-
	1%	-	4%	-	-	-	-	-	4%	-	-	-	-	-	-	5%	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Agree	54	20	11	12	11	16	18	25	10	14	11	18	21	7	6	9	32	9
	51%	65%	42%	52%	44%	64%	64%	51%	42%	67%	65%	64%	47%	47%	43%	41%	67%	33%
		b														AC		
Disagree	17	7	2	3	5	4	2	8	6	3	3	4	9	1	2	4	8	4
	16%	23%	8%	13%	20%	16%	7%	16%	25%	14%	18%	14%	20%	7%	14%	18%	17%	15%
									b									

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Current media and political criticism of businesses around tax, transparency and bonuses is reducing the UK's attractiveness as an investment destination

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	19	18	-	16	-	15	-	15	2	19	-
	18%	23%	-	21%	-	24%	-	29%	13%	26%	-
						b					
Slightly agree	35	28	2	27	3	28	2	22	4	27	2
	33%	36%	40%	36%	60%	44%	15%	43%	25%	36%	25%
						b					
Neither agree nor disagree	34	19	1	20	-	16	6	10	5	16	3
	32%	25%	20%	27%	-	25%	46%	20%	31%	22%	38%
Slightly disagree	16	11	2	11	2	4	5	4	4	11	3
	15%	14%	40%	15%	40%	6%	38%	8%	25%	15%	38%
						A			a		
Strongly disagree	1	1	-	1	-	-	-	-	1	1	-
	1%	1%	-	1%	-	-	-	-	6%	1%	-
									a		
Don't know	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Nets											
Agree	54	46	2	43	3	43	2	37	6	46	2
	51%	60%	40%	57%	60%	68%	15%	73%	38%	62%	25%
						B		B		B	
Disagree	17	12	2	12	2	4	5	4	5	12	3
	16%	16%	40%	16%	40%	6%	38%	8%	31%	16%	38%
						A		A			

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Uncertainty over the UK's future in the EU is reducing the country's attractiveness as an investment destination

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	16	4	1	8	3	5	6	8	6	5	4	8	4	1	3	5	5	6
	15%	13%	4%	35%	12%	20%	21%	16%	25%	24%	24%	29%	9%	7%	21%	23%	10%	22%
				aBd								B						
Slightly agree	37	14	8	3	12	10	12	15	7	9	7	11	17	4	4	4	18	10
	35%	45%	31%	13%	48%	40%	43%	31%	29%	43%	41%	39%	38%	27%	29%	18%	38%	37%
		C		C														
Neither agree nor disagree	33	7	10	8	8	6	5	19	5	4	2	5	13	8	6	9	15	7
	31%	23%	38%	35%	32%	24%	18%	39%	21%	19%	12%	18%	29%	53%	43%	41%	31%	26%
								bF						Ab	a			
Slightly disagree	14	4	4	4	2	3	4	6	3	1	2	2	11	1	-	2	7	4
	13%	13%	15%	17%	8%	12%	14%	12%	13%	5%	12%	7%	24%	7%	-	9%	15%	15%
													aD					
Strongly disagree	4	2	2	-	-	1	1	1	3	2	1	2	-	1	-	2	2	-
	4%	6%	8%	-	-	4%	4%	2%	13%	10%	6%	7%	-	7%	-	9%	4%	-
									c			b		b				
Don't know	1	-	1	-	-	-	-	-	-	-	-	-	-	-	1	-	1	-
	1%	-	4%	-	-	-	-	-	-	-	-	-	-	-	7%	-	2%	-
										c				b				
Nets																		
Agree	53	18	9	11	15	15	18	23	13	14	11	19	21	5	7	9	23	16
	50%	58%	35%	48%	60%	60%	64%	47%	54%	67%	65%	68%	47%	33%	50%	41%	48%	59%
		b		b								bC						
Disagree	18	6	6	4	2	4	5	7	6	3	3	4	11	2	-	4	9	4
	17%	19%	23%	17%	8%	16%	18%	14%	25%	14%	18%	14%	24%	13%	-	18%	19%	15%
													D					

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Uncertainty over the UK's future in the EU is reducing the country's attractiveness as an investment destination

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	16	15	-	16	-	10	2	12	2	13	-
	15%	19%	-	21%	-	16%	15%	24%	13%	18%	-
Slightly agree	37	29	1	29	2	28	4	24	3	28	3
	35%	38%	20%	39%	40%	44%	31%	47%	19%	38%	38%
								B			
Neither agree nor disagree	33	20	1	17	-	18	4	10	6	21	3
	31%	26%	20%	23%	-	29%	31%	20%	38%	28%	38%
Slightly disagree	14	8	3	9	3	4	3	3	3	7	2
	13%	10%	60%	12%	60%	6%	23%	6%	19%	9%	25%
			A		A		a				
Strongly disagree	4	4	-	3	-	3	-	2	2	4	-
	4%	5%	-	4%	-	5%	-	4%	13%	5%	-
Don't know	1	1	-	1	-	-	-	-	-	1	-
	1%	1%	-	1%	-	-	-	-	-	1%	-
Nets											
Agree	53	44	1	45	2	38	6	36	5	41	3
	50%	57%	20%	60%	40%	60%	46%	71%	31%	55%	38%
								B			
Disagree	18	12	3	12	3	7	3	5	5	11	2
	17%	16%	60%	16%	60%	11%	23%	10%	31%	15%	25%
			A		A			A			

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

UK graduates and school leavers have the right skills to allow me to recruit the people I need

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	25	13	6	4	2	8	7	13	4	8	4	9	11	2	3	8	12	2
	24%	42%	23%	17%	8%	32%	25%	27%	17%	38%	24%	32%	24%	13%	21%	36%	25%	7%
		cD														C	c	
Slightly agree	38	12	9	5	12	6	9	19	9	9	6	8	16	5	7	5	19	11
	36%	39%	35%	22%	48%	24%	32%	39%	38%	43%	35%	29%	36%	33%	50%	23%	40%	41%
					c													
Neither agree nor disagree	33	4	8	12	9	9	12	10	3	6	2	8	15	6	3	6	12	14
	31%	13%	31%	52%	36%	36%	32%	24%	42%	14%	35%	29%	33%	40%	21%	27%	25%	52%
				A	A			E										aB
Slightly disagree	6	2	1	2	1	-	1	4	1	1	2	2	2	1	1	2	3	-
	6%	6%	4%	9%	4%	-	4%	8%	4%	5%	15%	7%	4%	7%	7%	9%	6%	-
											a							
Strongly disagree	3	-	2	-	1	2	2	1	-	-	-	1	1	1	-	1	2	-
	3%	-	8%	-	4%	8%	7%	2%	-	-	-	4%	2%	7%	-	5%	4%	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Agree	63	25	15	9	14	14	16	32	13	17	10	17	27	7	10	13	31	13
	60%	81%	58%	39%	56%	56%	57%	65%	54%	81%	59%	61%	60%	47%	71%	59%	65%	48%
		bCd							abd									
Disagree	9	2	3	2	2	2	3	5	1	1	2	3	3	2	1	3	5	-
	9%	6%	12%	9%	8%	8%	11%	10%	4%	5%	15%	11%	7%	13%	7%	14%	10%	-
																c	c	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

UK graduates and school leavers have the right skills to allow me to recruit the people I need

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	25	23	1	22	1	24	-	19	2	24	-
	24%	30%	20%	29%	20%	38%	-	37%	13%	32%	-
						B		b		b	
Slightly agree	38	31	1	30	2	22	3	19	8	33	-
	36%	40%	20%	40%	40%	35%	23%	37%	50%	45%	-
										B	
Neither agree nor disagree	33	16	2	18	1	14	7	13	4	14	3
	31%	21%	40%	24%	20%	22%	54%	25%	25%	19%	38%
							A				
Slightly disagree	6	4	1	3	1	2	2	-	1	2	3
	6%	5%	20%	4%	20%	3%	15%	-	6%	3%	38%
							a		a		A
Strongly disagree	3	3	-	2	-	1	1	-	1	1	2
	3%	4%	-	3%	-	2%	8%	-	6%	1%	25%
									a		A
Don't know	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Nets											
Agree	63	54	2	52	3	46	3	38	10	57	-
	60%	70%	40%	69%	60%	73%	23%	75%	63%	77%	-
						B				B	
Disagree	9	7	1	5	1	3	3	-	2	3	5
	9%	9%	20%	7%	20%	5%	23%	-	13%	4%	63%
						A		A		A	

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

The UK government provides sufficient support to potential inward investors

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	18	8	2	3	5	3	6	8	4	4	3	9	6	-	3	4	9	3
	17%	26%	8%	13%	20%	12%	21%	16%	17%	19%	18%	32%	13%	-	21%	18%	19%	11%
		b					g					bC		c				
Slightly agree	32	12	8	4	8	11	9	11	12	7	8	9	18	3	1	7	15	9
	30%	39%	31%	17%	32%	44%	32%	22%	50%	33%	47%	32%	40%	20%	7%	32%	31%	33%
		c				c			C		c	d	D					
Neither agree nor disagree	39	10	13	11	5	9	9	20	8	8	4	8	12	9	8	7	19	9
	37%	32%	50%	48%	20%	36%	32%	41%	33%	38%	24%	29%	27%	60%	57%	32%	40%	33%
			D	D										aB	aB			
Slightly disagree	14	1	3	5	5	1	3	9	-	2	1	1	8	3	2	4	4	5
	13%	3%	12%	22%	20%	4%	11%	18%	-	10%	6%	4%	18%	20%	14%	18%	8%	19%
				A	A			aD			d		a	a				
Strongly disagree	1	-	-	-	1	1	1	1	-	-	-	1	-	-	-	-	1	-
	1%	-	-	-	4%	4%	4%	2%	-	-	-	4%	-	-	-	-	2%	-
Don't know	1	-	-	-	1	-	-	-	-	-	1	-	1	-	-	-	-	1
	1%	-	-	-	4%	-	-	-	-	-	6%	-	2%	-	-	-	-	4%
										c								
Nets																		
Agree	50	20	10	7	13	14	15	19	16	11	11	18	24	3	4	11	24	12
	48%	65%	38%	30%	52%	56%	54%	39%	67%	52%	65%	64%	53%	20%	29%	50%	50%	44%
		bC							C		c	CD	C					
Disagree	15	1	3	5	6	2	4	10	-	2	1	2	8	3	2	4	5	5
	14%	3%	12%	22%	24%	8%	14%	20%	-	10%	6%	7%	18%	20%	14%	18%	10%	19%
				A	A		d	D			d							

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

The UK government provides sufficient support to potential inward investors

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	18	17	-	16	-	17	-	15	1	17	-
	17%	22%	-	21%	-	27%	-	29%	6%	23%	-
						B		b			
Slightly agree	32	28	3	26	2	21	4	19	4	23	1
	30%	36%	60%	35%	40%	33%	31%	37%	25%	31%	13%
Neither agree nor disagree	39	25	1	25	2	19	4	11	5	25	4
	37%	32%	20%	33%	40%	30%	31%	22%	31%	34%	50%
Slightly disagree	14	6	1	8	1	6	3	5	5	8	2
	13%	8%	20%	11%	20%	10%	23%	10%	31%	11%	25%
									A		
Strongly disagree	1	1	-	-	-	-	1	-	1	-	1
	1%	1%	-	-	-	-	8%	-	6%	-	13%
							A		a		A
Don't know	1	-	-	-	-	-	1	1	-	1	-
	1%	-	-	-	-	-	8%	2%	-	1%	-
							A				
Nets											
Agree	50	45	3	42	2	38	4	34	5	40	1
	48%	58%	60%	56%	40%	60%	31%	67%	31%	54%	13%
						b		B		B	
Disagree	15	7	1	8	1	6	4	5	6	8	3
	14%	9%	20%	11%	20%	10%	31%	10%	38%	11%	38%
							A		A		A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Regional cities other than London are increasingly attractive as destinations for investment in the UK

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Strongly agree	22	8	5	3	6	7	4	10	6	6	3	12	6	3	1	6	12	4	
	21%	26%	19%	13%	24%	28%	14%	20%	25%	29%	18%	43%	13%	20%	7%	27%	25%	15%	
												BD							
Slightly agree	41	14	12	5	10	7	12	16	7	8	3	5	21	8	6	6	21	10	
	39%	45%	46%	22%	40%	28%	43%	33%	29%	38%	18%	18%	47%	53%	43%	27%	44%	37%	
			c	c			f						A	A	a				
Neither agree nor disagree	29	5	7	10	7	8	8	15	8	5	7	7	10	3	7	9	10	7	
	28%	16%	27%	43%	28%	32%	29%	31%	33%	24%	41%	25%	22%	20%	50%	41%	21%	26%	
				A							e				B	b			
Slightly disagree	11	4	2	4	1	2	3	6	3	2	4	3	8	-	-	1	4	5	
	10%	13%	8%	17%	4%	8%	11%	12%	13%	10%	24%	11%	18%	-	-	5%	8%	19%	
													cd						
Strongly disagree	2	-	-	1	1	1	1	2	-	-	-	1	-	1	-	-	1	1	
	2%	-	-	4%	4%	4%	4%	4%	-	-	-	4%	-	7%	-	-	2%	4%	
														b					
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Nets																			
Agree	63	22	17	8	16	14	16	26	13	14	6	17	27	11	7	12	33	14	
	60%	71%	65%	35%	64%	56%	57%	53%	54%	67%	35%	61%	60%	73%	50%	55%	69%	52%	
		C	C	C						f									
Disagree	13	4	2	5	2	3	4	8	3	2	4	4	8	1	-	1	5	6	
	12%	13%	8%	22%	8%	12%	14%	16%	13%	10%	24%	14%	18%	7%	-	5%	10%	22%	
													d					a	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Regional cities other than London are increasingly attractive as destinations for investment in the UK

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	22	19	-	18	-	22	-	18	2	19	-
	21%	25%	-	24%	-	35%	-	35%	13%	26%	-
						B		b			
Slightly agree	41	33	3	31	3	41	-	26	1	33	2
	39%	43%	60%	41%	60%	65%	-	51%	6%	45%	25%
						B		B			
Neither agree nor disagree	29	19	1	18	-	-	-	5	7	19	1
	28%	25%	20%	24%	-	-	-	10%	44%	26%	13%
								A			
Slightly disagree	11	5	1	7	2	-	11	2	4	3	4
	10%	6%	20%	9%	40%	-	85%	4%	25%	4%	50%
					A		A	A		A	
Strongly disagree	2	1	-	1	-	-	2	-	2	-	1
	2%	1%	-	1%	-	-	15%	-	13%	-	13%
							A	A		A	
Don't know	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Nets											
Agree	63	52	3	49	3	63	-	44	3	52	2
	60%	68%	60%	65%	60%	100%	-	86%	19%	70%	25%
						B		B		B	
Disagree	13	6	1	8	2	-	13	2	6	3	5
	12%	8%	20%	11%	40%	-	100%	4%	38%	4%	63%
					a		A	A		A	

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

I believe that Birmingham is an attractive alternative to London as an investment destination

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
Significance Level: 90%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Significance Level: 95%																			
Strongly agree	28 27%	13 42%	5 19%	5 22%	5 20%	12 48%	8 29%	10 20%	7 29%	10 48%	5 29%	6 46%	12 43%	11 24%	1 7%	3 21%	6 27%	16 33%	4 15%
		bd			C				C		c	C					c		
Slightly agree	23 22%	7 23%	4 15%	3 13%	9 36%	2 8%	7 25%	13 27%	7 29%	3 14%	5 29%	1 8%	6 21%	12 27%	2 13%	3 21%	3 14%	9 19%	9 33%
				bc			a	a		a									
Neither agree nor disagree	38 36%	7 23%	13 50%	9 39%	9 36%	8 32%	10 36%	13 27%	7 29%	7 33%	5 29%	5 38%	8 29%	14 31%	10 67%	5 36%	9 41%	14 29%	12 44%
			A											AB					
Slightly disagree	12 11%	3 10%	3 12%	4 17%	2 8%	3 12%	2 7%	10 20%	2 8%	- -	1 6%	- -	2 7%	7 16%	1 7%	2 14%	3 14%	7 15%	1 4%
							Eg												
Strongly disagree	4 4%	1 3%	1 4%	2 9%	- -	- -	1 4%	3 6%	1 4%	1 5%	1 6%	1 8%	- -	1 2%	1 7%	1 7%	1 5%	2 4%	1 4%
Don't know	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Nets																			
Agree	51 49%	20 65%	9 35%	8 35%	14 56%	14 56%	15 54%	23 47%	14 58%	13 62%	10 59%	7 54%	18 64%	23 51%	3 20%	6 43%	9 41%	25 52%	13 48%
		BC											C	C					
Disagree	16 15%	4 13%	4 15%	6 26%	2 8%	3 12%	3 11%	13 27%	3 13%	1 5%	2 12%	1 8%	2 7%	8 18%	2 13%	3 21%	4 18%	9 19%	2 7%
				d				E											

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

I believe that Birmingham is an attractive alternative to London as an investment destination

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	28	26	1	25	1	25	-	28	-	25	-
	27%	34%	20%	33%	20%	40%	-	55%	-	34%	-
						B		B		b	
Slightly agree	23	17	-	19	-	19	2	23	-	19	-
	22%	22%	-	25%	-	30%	15%	45%	-	26%	-
								B			
Neither agree nor disagree	38	21	4	20	4	16	5	-	-	19	5
	36%	27%	80%	27%	80%	25%	38%	-	-	26%	63%
			A		A					A	
Slightly disagree	12	10	-	8	-	3	4	-	12	9	2
	11%	13%	-	11%	-	5%	31%	-	75%	12%	25%
							A		A		
Strongly disagree	4	3	-	3	-	-	2	-	4	2	1
	4%	4%	-	4%	-	-	15%	-	25%	3%	13%
							A		A		
Don't know	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Nets											
Agree	51	43	1	44	1	44	2	51	-	44	-
	49%	56%	20%	59%	20%	70%	15%	100%	-	59%	-
				b		B		B		B	
Disagree	16	13	-	11	-	3	6	-	16	11	3
	15%	17%	-	15%	-	5%	46%	-	100%	15%	38%
							A		A		

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Summary table

Base: All Respondents

	Total	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	Don't know	Nets	
								Agree	Disagree
		a	b	c	d	e	f	a	b
		A	B	C	D	E	F	A	B
Significance Level: 90%									
Significance Level: 95%									
The UK must invest more in large transport projects to remain competitive in the future	105	18	41	30	14	1	1	59	15
	100%	17%	39%	29%	13%	1%	1%	56%	14%
The UK risks falling behind as an investment destination because of a lack of direct air links between its regions and important markets	105	15	33	32	16	8	1	48	24
	100%	14%	31%	30%	15%	8%	1%	46%	23%
HS2 (High speed railway linking London with the Midlands and Northern UK) will make the UK more attractive as an investment destination	105	22	38	34	10	-	1	60	10
	100%	21%	36%	32%	10%	-	1%	57%	10%
I rely on rail links to grow my business, and need better connections in the UK in order to invest further here	105	14	33	39	10	7	2	47	17
	100%	13%	31%	37%	10%	7%	2%	45%	16%
I rely on air links to grow my business, and need direct routes to different parts of the UK outside London in order to invest further here	105	23	33	34	10	3	2	56	13
	100%	22%	31%	32%	10%	3%	2%	53%	12%

Columns Tested: A,B,C,D,E,F - A,B

Survey of Potential Investors

Q4. To what extent, if at all, do you agree or disagree with each of the following statements?

Summary table

Base: All Respondents

	Total	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	Don't know	Nets	
								Agree	Disagree
		a	b	c	d	e	f	a	b
		A	B	C	D	E	F	A	B
Significance Level: 90%									
Significance Level: 95%									
Current media and political criticism of businesses around tax, transparency and bonuses is reducing the UK's attractiveness as an investment destination	105 100%	19 18%	35 33%	34 32%	16 15%	1 1%	- -	54 51%	17 16%
Uncertainty over the UK's future in the EU is reducing the country's attractiveness as an investment destination	105 100%	16 15%	37 35%	33 31%	14 13%	4 4%	1 1%	53 50%	18 17%
UK graduates and school leavers have the right skills to allow me to recruit the people I need	105 100%	25 24%	38 36%	33 31%	6 6%	3 3%	- -	63 60%	9 9%
The UK government provides sufficient support to potential inward investors	105 100%	18 17%	32 30%	39 37%	14 13%	1 1%	1 1%	50 48%	15 14%
Regional cities other than London are increasingly attractive as destinations for investment in the UK	105 100%	22 21%	41 39%	29 28%	11 10%	2 2%	- -	63 60%	13 12%
I believe that Birmingham is an attractive alternative to London as an investment destination	105 100%	28 27%	23 22%	38 36%	12 11%	4 4%	- -	51 49%	16 15%

Columns Tested: A,B,C,D,E,F - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The cost effectiveness of the location

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title			
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Significance Level: 90%		a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
Significance Level: 95%		A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Total	105	31	26	23	25	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	47	19	13	9	6	10	14	27	8	16	11	8	16	16	6	8	11	28	5
	45%	61%	50%	39%	24%	40%	50%	55%	33%	76%	65%	62%	57%	36%	40%	57%	50%	58%	19%
		D	d					d		AbD	d		b				C	C	
Fairly important	27	8	5	4	10	6	4	9	8	2	2	2	8	11	4	2	7	9	8
	26%	26%	19%	17%	40%	24%	14%	18%	33%	10%	12%	15%	29%	24%	27%	14%	32%	19%	30%
					c				e										
Neither important nor unimportant	22	3	6	6	7	6	7	8	6	2	3	1	2	14	3	3	2	4	14
	21%	10%	23%	26%	28%	24%	25%	16%	25%	10%	18%	8%	7%	31%	20%	21%	9%	8%	52%
					a									A					AB
Fairly unimportant	6	1	2	3	-	2	2	3	1	1	1	1	1	4	1	-	2	4	-
	6%	3%	8%	13%	-	8%	7%	6%	4%	5%	6%	8%	4%	9%	7%	-	9%	8%	-
				d															
Very unimportant	2	-	-	-	2	1	1	2	-	-	-	-	1	-	1	-	-	2	-
	2%	-	-	-	8%	4%	4%	4%	-	-	-	-	4%	-	7%	-	-	4%	-
															b				
Don't know	1	-	-	1	-	-	-	-	1	-	-	1	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	8%	-	-	-	7%	-	2%	-
												c			b				
Nets																			
Important	74	27	18	13	16	16	18	36	16	18	13	10	24	27	10	10	18	37	13
	70%	87%	69%	57%	64%	64%	64%	73%	67%	86%	76%	77%	86%	60%	67%	71%	82%	77%	48%
		CD								b			B				C	C	
Unimportant	8	1	2	3	2	3	3	5	1	1	1	1	2	4	2	-	2	6	-
	8%	3%	8%	13%	8%	12%	11%	10%	4%	5%	6%	8%	7%	9%	13%	-	9%	13%	-
																			c

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The cost effectiveness of the location

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	47	42	-	39	-	34	1	28	7	47	-
	45%	55%	-	52%	-	54%	8%	55%	44%	64%	-
		B		B		B				B	
Fairly important	27	22	1	20	2	18	2	16	4	27	-
	26%	29%	20%	27%	40%	29%	15%	31%	25%	36%	-
										B	
Neither important nor unimportant	22	10	3	14	1	9	5	7	2	-	-
	21%	13%	60%	19%	20%	14%	38%	14%	13%	-	-
			A				A				
Fairly unimportant	6	2	1	2	2	1	4	-	2	-	6
	6%	3%	20%	3%	40%	2%	31%	-	13%	-	75%
			A		A		A		A		A
Very unimportant	2	1	-	-	-	1	1	-	1	-	2
	2%	1%	-	-	-	2%	8%	-	6%	-	25%
									a		A
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	74	64	1	59	2	52	3	44	11	74	-
	70%	83%	20%	79%	40%	83%	23%	86%	69%	100%	-
		B		b		B				B	
Unimportant	8	3	1	2	2	2	5	-	3	-	8
	8%	4%	20%	3%	40%	3%	38%	-	19%	-	100%
				A		A		A			A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The location's quality of life and attractiveness to current / future employees

Base: All Respondents

	Respondent location				Operational facilities								Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	33	11	9	8	5	8	12	16	6	9	4	5	10	14	3	6	8	18	5
	31%	35%	35%	35%	20%	32%	43%	33%	25%	43%	24%	38%	36%	31%	20%	43%	36%	38%	19%
Fairly important	34	11	6	4	13	7	2	14	9	6	7	4	7	13	6	5	6	13	11
	32%	35%	23%	17%	52%	28%	7%	29%	38%	29%	41%	31%	25%	29%	40%	36%	27%	27%	41%
					BC	B		B	B	b	B	b							
Neither important nor unimportant	26	7	8	8	3	7	12	14	7	5	6	2	8	12	4	2	6	10	9
	25%	23%	31%	35%	12%	28%	43%	29%	29%	24%	35%	15%	29%	27%	27%	14%	27%	21%	33%
				d				g											
Fairly unimportant	9	2	3	-	4	3	2	3	1	1	-	1	3	4	2	-	2	5	2
	9%	6%	12%	-	16%	12%	7%	6%	4%	5%	-	8%	11%	9%	13%	-	9%	10%	7%
			c		c														
Very unimportant	2	-	-	2	-	-	-	2	-	-	-	-	-	2	-	-	-	1	-
	2%	-	-	9%	-	-	-	4%	-	-	-	-	-	4%	-	-	-	2%	-
Don't know	1	-	-	1	-	-	-	-	1	-	-	1	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	8%	-	-	-	7%	-	2%	-
												c			b				
Nets																			
Important	67	22	15	12	18	15	14	30	15	15	11	9	17	27	9	11	14	31	16
	64%	71%	58%	52%	72%	60%	50%	61%	63%	71%	65%	69%	61%	60%	60%	79%	64%	65%	59%
Unimportant	11	2	3	2	4	3	2	5	1	1	-	1	3	6	2	-	2	6	2
	10%	6%	12%	9%	16%	12%	7%	10%	4%	5%	-	8%	11%	13%	13%	-	9%	13%	7%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The location's quality of life and attractiveness to current / future employees

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	33	30	1	28	1	27	-	21	4	33	-
	31%	39%	20%	37%	20%	43%	-	41%	25%	45%	-
						B				B	
Fairly important	34	26	-	27	1	20	5	20	6	28	-
	32%	34%	-	36%	20%	32%	38%	39%	38%	38%	-
										B	
Neither important nor unimportant	26	15	2	17	1	10	5	6	4	10	3
	25%	19%	40%	23%	20%	16%	38%	12%	25%	14%	38%
							a				a
Fairly unimportant	9	5	2	3	1	6	2	4	1	2	4
	9%	6%	40%	4%	20%	10%	15%	8%	6%	3%	50%
			A							A	A
Very unimportant	2	1	-	-	1	-	1	-	1	1	1
	2%	1%	-	-	20%	-	8%	-	6%	1%	13%
					A		A		a		a
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	67	56	1	55	2	47	5	41	10	61	-
	64%	73%	20%	73%	40%	75%	38%	80%	63%	82%	-
		B				B				B	
Unimportant	11	6	2	3	2	6	3	4	2	3	5
	10%	8%	40%	4%	40%	10%	23%	8%	13%	4%	63%
			A		A						A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The general environment and feel of a location

Base: All Respondents

	Respondent location				Operational facilities								Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	38	18	8	6	6	11	8	20	9	10	4	13	14	3	8	8	19	7	
	36%	58%	31%	26%	24%	44%	29%	41%	38%	48%	24%	46%	31%	20%	57%	36%	40%	26%	
		BCD				g		g		g		c			bC				
Fairly important	34	9	10	4	11	6	12	14	8	6	8	8	16	6	1	10	14	9	
	32%	29%	38%	17%	44%	24%	43%	29%	33%	29%	47%	29%	36%	40%	7%	45%	29%	33%	
					c						ACe		D	D					
Neither important nor unimportant	23	4	7	7	5	5	7	9	5	4	3	6	10	4	3	4	9	8	
	22%	13%	27%	30%	20%	20%	25%	18%	21%	19%	18%	21%	22%	27%	21%	18%	19%	30%	
					g	g	g	g	g										
Fairly unimportant	7	-	1	3	3	3	1	4	1	1	2	1	3	2	1	-	4	3	
	7%	-	4%	13%	12%	12%	4%	8%	4%	5%	12%	4%	7%	13%	7%	-	8%	11%	
				A	a														
Very unimportant	2	-	-	2	-	-	-	2	-	-	-	-	2	-	-	-	1	-	
	2%	-	-	9%	-	-	-	4%	-	-	-	-	4%	-	-	-	2%	-	
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-	
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-	
											c				b				
Nets																			
Important	72	27	18	10	17	17	20	34	17	16	12	21	30	9	9	18	33	16	
	69%	87%	69%	43%	68%	68%	71%	69%	71%	76%	77%	75%	67%	60%	64%	82%	69%	59%	
		Cd	c	c	c											c			
Unimportant	9	-	1	5	3	3	1	6	1	1	2	1	5	2	1	-	5	3	
	9%	-	4%	22%	12%	12%	4%	12%	4%	5%	12%	4%	11%	13%	7%	-	10%	11%	
				Ab	a														

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The general environment and feel of a location

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	38	36	1	34	1	30	2	24	6	34	1
	36%	47%	20%	45%	20%	48%	15%	47%	38%	46%	13%
						B				b	
Fairly important	34	26	-	27	-	20	4	19	4	29	-
	32%	34%	-	36%	-	32%	31%	37%	25%	39%	-
										B	
Neither important nor unimportant	23	10	3	9	3	11	4	7	3	9	3
	22%	13%	60%	12%	60%	17%	31%	14%	19%	12%	38%
			A		A						a
Fairly unimportant	7	4	1	5	-	2	2	1	2	1	3
	7%	5%	20%	7%	-	3%	15%	2%	13%	1%	38%
						a			a		A
Very unimportant	2	1	-	-	1	-	1	-	1	1	1
	2%	1%	-	-	20%	-	8%	-	6%	1%	13%
					A		A		a		a
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	72	62	1	61	1	50	6	43	10	63	1
	69%	81%	20%	81%	20%	79%	46%	84%	63%	85%	13%
		B		B		B		b		B	
Unimportant	9	5	1	5	1	2	3	1	3	2	4
	9%	6%	20%	7%	20%	3%	23%	2%	19%	3%	50%
						A		A			A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

Support from local government and local investment bodies

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	32	15	7	4	6	7	10	13	5	6	4	12	13	1	6	6	18	6
	30%	48%	27%	17%	24%	28%	36%	27%	21%	29%	24%	43%	29%	7%	43%	27%	38%	22%
		Cd										C	c	C				
Fairly important	48	15	13	10	10	14	10	24	13	13	10	14	18	9	4	12	17	14
	46%	48%	50%	43%	40%	56%	36%	49%	54%	62%	59%	50%	40%	60%	29%	55%	35%	52%
									b									
Neither important nor unimportant	13	1	3	5	4	2	4	7	3	1	1	2	7	1	3	3	5	5
	12%	3%	12%	22%	16%	8%	14%	14%	13%	5%	6%	7%	16%	7%	21%	14%	10%	19%
				A														
Fairly unimportant	7	-	-	3	4	1	3	3	2	1	2	-	6	1	-	-	4	2
	7%	-	-	13%	16%	4%	11%	6%	8%	5%	12%	-	13%	7%	-	-	8%	7%
				Ab	AB								A					
Very unimportant	4	-	3	-	1	1	1	2	-	-	-	-	1	3	-	1	3	-
	4%	-	12%	-	4%	4%	4%	4%	-	-	-	-	2%	20%	-	5%	6%	-
			ac											ABd				
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
									c					b				
Nets																		
Important	80	30	20	14	16	21	20	37	18	19	14	26	31	10	10	18	35	20
	76%	97%	77%	61%	64%	84%	71%	76%	75%	90%	82%	93%	69%	67%	71%	82%	73%	74%
		BCD										BCd						
Unimportant	11	-	3	3	5	2	4	5	2	1	2	-	7	4	-	1	7	2
	10%	-	12%	13%	20%	8%	14%	10%	8%	5%	12%	-	16%	27%	-	5%	15%	7%
			a	A	A								A	AD				

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

Support from local government and local investment bodies

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	32	30	1	29	1	28	-	27	2	32	-
	30%	39%	20%	39%	20%	44%	-	53%	13%	43%	-
						B		B		B	
Fairly important	48	38	-	36	1	25	8	17	10	37	1
	46%	49%	-	48%	20%	40%	62%	33%	63%	50%	13%
		B						A		B	
Neither important nor unimportant	13	3	3	5	2	4	3	3	2	2	2
	12%	4%	60%	7%	40%	6%	23%	6%	13%	3%	25%
			A		A		a				A
Fairly unimportant	7	5	1	3	1	3	2	3	2	2	2
	7%	6%	20%	4%	20%	5%	15%	6%	13%	3%	25%
											A
Very unimportant	4	1	-	2	-	3	-	1	-	1	3
	4%	1%	-	3%	-	5%	-	2%	-	1%	38%
											A
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	80	68	1	65	2	53	8	44	12	69	1
	76%	88%	20%	87%	40%	84%	62%	86%	75%	93%	13%
		B		B		b				B	
Unimportant	11	6	1	5	1	6	2	4	2	3	5
	10%	8%	20%	7%	20%	10%	15%	8%	13%	4%	63%
											A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The location's international links

Base: All Respondents

	Respondent location				Operational facilities								Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director	
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c	
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C	
Significance Level: 90%																			
Significance Level: 95%																			
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	39	13	10	5	11	12	21	8	8	7	8	13	15	4	7	9	19	9	
	37%	42%	38%	22%	44%	48%	39%	43%	33%	38%	41%	46%	33%	27%	50%	41%	40%	33%	
Fairly important	36	13	9	8	6	6	14	9	7	6	3	8	14	6	5	7	14	11	
	34%	42%	35%	35%	24%	24%	25%	29%	38%	33%	23%	29%	31%	40%	36%	32%	29%	41%	
Neither important nor unimportant	17	4	4	4	5	4	10	6	4	1	-	5	8	3	1	4	7	5	
	16%	13%	15%	17%	20%	16%	18%	20%	25%	19%	6%	18%	18%	20%	7%	18%	15%	19%	
Fairly unimportant	12	1	3	5	3	3	5	4	-	2	3	2	8	2	-	2	7	2	
	11%	3%	12%	22%	12%	12%	18%	8%	-	10%	18%	7%	18%	13%	-	9%	15%	7%	
Very unimportant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Don't know	1	-	-	1	-	-	-	1	-	-	1	-	-	-	1	-	1	-	
	1%	-	-	4%	-	-	-	4%	-	-	8%	-	-	-	7%	-	2%	-	
Nets																			
Important	75	26	19	13	17	18	18	35	17	15	13	21	29	10	12	16	33	20	
	71%	84%	73%	57%	68%	72%	64%	71%	71%	71%	76%	75%	64%	67%	86%	73%	69%	74%	
Unimportant	12	1	3	5	3	3	5	4	-	2	3	2	8	2	-	2	7	2	
	11%	3%	12%	22%	12%	12%	18%	8%	-	10%	18%	7%	18%	13%	-	9%	15%	7%	

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

The location's international links

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
		a	b	a	b	a	b	a	b	a	b
		A	B	A	B	A	B	A	B	A	B
Significance Level: 90%											
Significance Level: 95%											
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	39	34	1	34	1	31	1	27	4	37	-
	37%	44%	20%	45%	20%	49%	8%	53%	25%	50%	-
						B		b		B	
Fairly important	36	28	1	27	1	19	6	16	6	26	-
	34%	36%	20%	36%	20%	30%	46%	31%	38%	35%	-
										B	
Neither important nor unimportant	17	9	1	6	2	8	4	4	3	7	4
	16%	12%	20%	8%	40%	13%	31%	8%	19%	9%	50%
					A						A
Fairly unimportant	12	6	2	8	1	5	2	4	3	4	4
	11%	8%	40%	11%	20%	8%	15%	8%	19%	5%	50%
			A								A
Very unimportant	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	75	62	2	61	2	50	7	43	10	63	-
	71%	81%	40%	81%	40%	79%	54%	84%	63%	85%	-
		B		B		b		b		B	
Unimportant	12	6	2	8	1	5	2	4	3	4	4
	11%	8%	40%	11%	20%	8%	15%	8%	19%	5%	50%
			A								A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

Recommendations from external consultants and experts

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	25	13	5	3	4	6	5	12	4	7	2	8	11	1	4	6	11	6
	24%	42%	19%	13%	16%	24%	18%	24%	17%	33%	12%	29%	24%	7%	29%	27%	23%	22%
		bCD							g									
Fairly important	38	13	11	7	7	11	11	15	12	8	9	12	16	5	3	10	20	5
	36%	42%	42%	30%	28%	44%	39%	31%	50%	38%	53%	43%	36%	33%	21%	45%	42%	19%
																C	C	
Neither important nor unimportant	27	3	8	8	8	6	9	16	5	3	4	6	12	5	4	3	9	13
	26%	10%	31%	35%	32%	24%	32%	33%	21%	14%	24%	21%	27%	33%	29%	14%	19%	48%
			A	A	A													AB
Fairly unimportant	13	2	1	4	6	2	3	5	2	3	2	2	6	3	2	3	6	3
	12%	6%	4%	17%	24%	8%	11%	10%	8%	14%	12%	7%	13%	20%	14%	14%	13%	11%
				aB														
Very unimportant	1	-	1	-	-	-	-	1	-	-	-	-	-	1	-	-	1	-
	1%	-	4%	-	-	-	-	2%	-	-	-	-	-	7%	-	-	2%	-
														b				
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
											c			b				
Nets																		
Important	63	26	16	10	11	17	16	27	16	15	11	20	27	6	7	16	31	11
	60%	84%	62%	43%	44%	68%	57%	55%	67%	71%	65%	71%	60%	40%	50%	73%	65%	41%
		bCD				g			g			c				C	C	
Unimportant	14	2	2	4	6	2	3	6	2	3	2	2	6	4	2	3	7	3
	13%	6%	8%	17%	24%	8%	11%	12%	8%	14%	12%	7%	13%	27%	14%	14%	15%	11%
				a										a				

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

Recommendations from external consultants and experts

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	25	23	-	22	-	22	-	19	2	23	-
	24%	30%	-	29%	-	35%	-	37%	13%	31%	-
						B		b		b	
Fairly important	38	32	2	29	1	27	4	20	6	35	1
	36%	42%	40%	39%	20%	43%	31%	39%	38%	47%	13%
										b	
Neither important nor unimportant	27	14	1	17	3	9	6	7	5	9	3
	26%	18%	20%	23%	60%	14%	46%	14%	31%	12%	38%
					a		A				a
Fairly unimportant	13	8	2	6	1	4	3	4	3	6	4
	12%	10%	40%	8%	20%	6%	23%	8%	19%	8%	50%
			a				a				A
Very unimportant	1	-	-	1	-	1	-	1	-	1	-
	1%	-	-	1%	-	2%	-	2%	-	1%	-
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	63	55	2	51	1	49	4	39	8	58	1
	60%	71%	40%	68%	20%	78%	31%	76%	50%	78%	13%
				B		B		B		B	
Unimportant	14	8	2	7	1	5	3	5	3	7	4
	13%	10%	40%	9%	20%	8%	23%	10%	19%	9%	50%
			a								A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

Access to local talent / recruitment and training programmes

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	31	12	8	7	4	8	7	13	7	10	4	11	15	1	4	6	14	7
	30%	39%	31%	30%	16%	32%	25%	27%	29%	48%	24%	39%	33%	7%	29%	27%	29%	26%
		d							c			C	C					
Fairly important	45	13	10	9	13	13	12	25	12	8	9	12	17	9	5	10	22	10
	43%	42%	38%	39%	52%	52%	43%	51%	50%	38%	53%	43%	38%	60%	36%	45%	46%	37%
Neither important nor unimportant	20	6	6	3	5	2	7	7	4	3	4	5	7	3	4	5	6	9
	19%	19%	23%	13%	20%	8%	25%	14%	17%	14%	24%	18%	16%	20%	29%	23%	13%	33%
																		B
Fairly unimportant	7	-	1	3	3	2	1	4	-	-	-	-	5	2	-	-	5	1
	7%	-	4%	13%	12%	8%	4%	8%	-	-	-	-	11%	13%	-	-	10%	4%
				A	a								a	a				
Very unimportant	1	-	1	-	-	-	1	-	-	-	-	-	1	-	-	1	-	-
	1%	-	4%	-	-	-	4%	-	-	-	-	-	2%	-	-	5%	-	-
Don't know	1	-	-	1	-	-	-	-	1	-	1	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	8%	-	-	-	7%	-	2%	-
											c				b			
Nets																		
Important	76	25	18	16	17	21	19	38	19	18	13	23	32	10	9	16	36	17
	72%	81%	69%	70%	68%	84%	68%	78%	79%	86%	76%	82%	71%	67%	64%	73%	75%	63%
Unimportant	8	-	2	3	3	2	2	4	-	-	-	-	6	2	-	1	5	1
	8%	-	8%	13%	12%	8%	7%	8%	-	-	-	-	13%	13%	-	5%	10%	4%
				A	a							A	a					

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

Access to local talent / recruitment and training programmes

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	31	30	-	29	-	25	3	21	2	28	-
	30%	39%	-	39%	-	40%	23%	41%	13%	38%	-
		b		b				B		B	
Fairly important	45	33	2	32	2	26	5	23	10	36	2
	43%	43%	40%	43%	40%	41%	38%	45%	63%	49%	25%
Neither important nor unimportant	20	10	2	11	2	9	4	6	2	8	2
	19%	13%	40%	15%	40%	14%	31%	12%	13%	11%	25%
Fairly unimportant	7	4	1	3	1	3	1	1	2	2	3
	7%	5%	20%	4%	20%	5%	8%	2%	13%	3%	38%
									a		A
Very unimportant	1	-	-	-	-	-	-	-	-	-	1
	1%	-	-	-	-	-	-	-	-	-	13%
											A
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	76	63	2	61	2	51	8	44	12	64	2
	72%	82%	40%	81%	40%	81%	62%	86%	75%	86%	25%
		B		B						B	
Unimportant	8	4	1	3	1	3	1	1	2	2	4
	8%	5%	20%	4%	20%	5%	8%	2%	13%	3%	50%
									a		A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

It's seen as a cool or up-and-coming place to be

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	19	8	4	2	5	7	5	9	4	5	3	7	9	-	3	3	12	3
	18%	26%	15%	9%	20%	28%	18%	18%	17%	24%	18%	25%	20%	-	21%	14%	25%	11%
												C	c	c				
Fairly important	37	12	9	6	10	7	10	17	9	8	5	8	16	6	6	9	13	11
	35%	39%	35%	26%	40%	28%	36%	35%	38%	38%	29%	29%	36%	40%	43%	41%	27%	41%
Neither important nor unimportant	30	6	8	9	7	6	11	13	5	5	8	8	13	5	2	7	13	7
	29%	19%	31%	39%	28%	24%	39%	27%	21%	24%	47%	29%	29%	33%	14%	32%	27%	26%
									d									
Fairly unimportant	12	3	4	3	2	3	2	7	4	2	-	4	6	2	-	3	5	4
	11%	10%	15%	13%	8%	12%	7%	14%	17%	10%	-	14%	13%	13%	-	14%	10%	15%
									f									
Very unimportant	6	2	1	2	1	2	-	3	1	1	1	1	1	2	2	-	4	2
	6%	6%	4%	9%	4%	8%	-	6%	4%	5%	6%	4%	2%	13%	14%	-	8%	7%
														b	b			
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
									c					b				
Nets																		
Important	56	20	13	8	15	14	15	26	13	13	8	15	25	6	9	12	25	14
	53%	65%	50%	35%	60%	56%	54%	53%	54%	62%	47%	54%	56%	40%	64%	55%	52%	52%
		C		c														
Unimportant	18	5	5	5	3	5	2	10	5	3	1	5	7	4	2	3	9	6
	17%	16%	19%	22%	12%	20%	7%	20%	21%	14%	6%	18%	16%	27%	14%	14%	19%	22%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

It's seen as a cool or up-and-coming place to be

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	19	18	1	18	1	16	-	16	1	18	-
	18%	23%	20%	24%	20%	25%	-	31%	6%	24%	-
						B		B			
Fairly important	37	30	-	29	1	26	1	17	5	31	-
	35%	39%	-	39%	20%	41%	8%	33%	31%	42%	-
		b				B				B	
Neither important nor unimportant	30	20	1	20	2	12	6	12	6	18	3
	29%	26%	20%	27%	40%	19%	46%	24%	38%	24%	38%
						A					
Fairly unimportant	12	4	3	4	1	6	5	4	3	4	3
	11%	5%	60%	5%	20%	10%	38%	8%	19%	5%	38%
			A				A				A
Very unimportant	6	5	-	4	-	3	1	2	1	3	2
	6%	6%	-	5%	-	5%	8%	4%	6%	4%	25%
											A
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	56	48	1	47	2	42	1	33	6	49	-
	53%	62%	20%	63%	40%	67%	8%	65%	38%	66%	-
		b				B		b		B	
Unimportant	18	9	3	8	1	9	6	6	4	7	5
	17%	12%	60%	11%	20%	14%	46%	12%	25%	9%	63%
			A				A				A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

It provides financial incentives to investors

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level	VP/Director
Total	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	34	13	6	7	8	9	10	18	6	7	6	14	12	3	5	5	21	6
	32%	42%	23%	30%	32%	36%	36%	37%	25%	33%	35%	50%	27%	20%	36%	23%	44%	22%
												Bc				ac		
Fairly important	38	13	12	5	8	9	8	17	7	6	4	6	15	7	7	11	11	12
	36%	42%	46%	22%	32%	36%	29%	35%	29%	29%	24%	21%	33%	47%	50%	50%	23%	44%
			c											a	a	B	b	
Neither important nor unimportant	20	5	3	6	6	5	6	8	8	6	5	7	9	3	1	4	8	7
	19%	16%	12%	26%	24%	20%	21%	16%	33%	29%	29%	25%	20%	20%	7%	18%	17%	26%
							g											
Fairly unimportant	10	-	4	3	3	1	4	5	2	2	2	1	8	1	-	2	5	2
	10%	-	15%	13%	12%	4%	14%	10%	8%	10%	12%	4%	18%	7%	-	9%	10%	7%
			A	A	a								ad					
Very unimportant	2	-	1	1	-	1	-	1	-	-	-	-	1	1	-	-	2	-
	2%	-	4%	4%	-	4%	-	2%	-	-	-	-	2%	7%	-	-	4%	-
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
									c					b				
Nets																		
Important	72	26	18	12	16	18	18	35	13	13	10	20	27	10	12	16	32	18
	69%	84%	69%	52%	64%	72%	64%	71%	54%	62%	59%	71%	60%	67%	86%	73%	67%	67%
		Cd												b				
Unimportant	12	-	5	4	3	2	4	6	2	2	2	1	9	2	-	2	7	2
	11%	-	19%	17%	12%	8%	14%	12%	8%	10%	12%	4%	20%	13%	-	9%	15%	7%
			A	A	a							ad						

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

It provides financial incentives to investors

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	34	30	1	29	1	28	1	26	3	33	-
	32%	39%	20%	39%	20%	44%	8%	51%	19%	45%	-
						B		B		B	
Fairly important	38	32	-	32	1	21	5	13	8	28	1
	36%	42%	-	43%	20%	33%	38%	25%	50%	38%	13%
		b						a			
Neither important nor unimportant	20	8	3	8	2	8	5	7	2	9	3
	19%	10%	60%	11%	40%	13%	38%	14%	13%	12%	38%
			A		a		A				a
Fairly unimportant	10	6	1	5	-	5	1	5	3	4	2
	10%	8%	20%	7%	-	8%	8%	10%	19%	5%	25%
										A	A
Very unimportant	2	1	-	1	1	1	1	-	-	-	2
	2%	1%	-	1%	20%	2%	8%	-	-	-	25%
					A						A
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	72	62	1	61	2	49	6	39	11	61	1
	69%	81%	20%	81%	40%	78%	46%	76%	69%	82%	13%
		B		B		B				B	
Unimportant	12	7	1	6	1	6	2	5	3	4	4
	11%	9%	20%	8%	20%	10%	15%	10%	19%	5%	50%
											A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q5. How important are the following factors in your decision on where to invest?

Summary table

Base: All Respondents

	Total	Very important	Fairly important	Neither important nor unimportant	Fairly unimportant	Very unimportant	Don't know	Nets	
								Important	Unimportant
		a	b	c	d	e	f	a	b
		A	B	C	D	E	F	A	B
The cost effectiveness of the location	105	47	27	22	6	2	1	74	8
	100%	45%	26%	21%	6%	2%	1%	70%	8%
The location's quality of life and attractiveness to current / future employees	105	33	34	26	9	2	1	67	11
	100%	31%	32%	25%	9%	2%	1%	64%	10%
The general environment and feel of a location	105	38	34	23	7	2	1	72	9
	100%	36%	32%	22%	7%	2%	1%	69%	9%
Support from local government and local investment bodies	105	32	48	13	7	4	1	80	11
	100%	30%	46%	12%	7%	4%	1%	76%	10%
The location's international links	105	39	36	17	12	-	1	75	12
	100%	37%	34%	16%	11%	-	1%	71%	11%
Recommendations from external consultants and experts	105	25	38	27	13	1	1	63	14
	100%	24%	36%	26%	12%	1%	1%	60%	13%
Access to local talent / recruitment and training programmes	105	31	45	20	7	1	1	76	8
	100%	30%	43%	19%	7%	1%	1%	72%	8%
It's seen as a cool or up-and-coming place to be	105	19	37	30	12	6	1	56	18
	100%	18%	35%	29%	11%	6%	1%	53%	17%
It provides financial incentives to investors	105	34	38	20	10	2	1	72	12
	100%	32%	36%	19%	10%	2%	1%	69%	11%

Columns Tested: A,B,C,D,E,F - A,B

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Help with planning and organisation (red tape etc.)

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	37	16	12	5	4	9	11	20	11	11	5	12	15	3	6	11	15	8
	35%	52%	46%	22%	16%	36%	39%	41%	46%	52%	29%	43%	33%	20%	43%	50%	31%	30%
		CD	cD															
Fairly important	41	13	10	7	11	11	9	19	7	7	5	10	18	8	4	8	19	11
	39%	42%	38%	30%	44%	44%	32%	39%	29%	33%	29%	36%	40%	53%	29%	36%	40%	41%
Neither important nor unimportant	20	1	4	10	5	4	7	7	5	3	7	5	10	2	2	2	11	5
	19%	3%	15%	43%	20%	16%	25%	14%	21%	14%	41%	18%	22%	13%	14%	9%	23%	19%
				ABd	A						aCeG							
Fairly unimportant	5	1	-	-	4	1	-	3	-	-	1	1	1	2	1	1	1	3
	5%	3%	-	-	16%	4%	-	6%	-	-	8%	4%	2%	13%	7%	5%	2%	11%
					Bc									b				b
Very unimportant	1	-	-	-	1	-	1	-	-	-	-	-	1	-	-	-	1	-
	1%	-	-	-	4%	-	4%	-	-	-	-	-	2%	-	-	-	2%	-
Don't know	1	-	-	1	-	-	-	-	1	-	1	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	8%	-	-	-	7%	-	2%	-
											c				b			
Nets																		
Important	78	29	22	12	15	20	20	39	18	18	10	22	33	11	10	19	34	19
	74%	94%	85%	52%	60%	80%	71%	80%	75%	86%	59%	79%	73%	73%	71%	86%	71%	70%
		CD	Cd					f		f								
Unimportant	6	1	-	-	5	1	1	3	-	-	1	1	2	2	1	1	2	3
	6%	3%	-	-	20%	4%	4%	6%	-	-	8%	4%	4%	13%	7%	5%	4%	11%
					ABC													

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Help with planning and organisation (red tape etc.)

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	37	33	-	32	-	27	2	24	5	33	-
	35%	43%	-	43%	-	43%	15%	47%	31%	45%	-
		b		b		b				B	
Fairly important	41	32	2	33	2	26	5	20	7	32	2
	39%	42%	40%	44%	40%	41%	38%	39%	44%	43%	25%
Neither important nor unimportant	20	10	1	7	2	7	5	5	4	8	4
	19%	13%	20%	9%	40%	11%	38%	10%	25%	11%	50%
				A		A				A	
Fairly unimportant	5	1	2	2	1	2	1	1	-	1	2
	5%	1%	40%	3%	20%	3%	8%	2%	-	1%	25%
			A		a					A	
Very unimportant	1	1	-	1	-	1	-	1	-	-	-
	1%	1%	-	1%	-	2%	-	2%	-	-	-
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	78	65	2	65	2	53	7	44	12	65	2
	74%	84%	40%	87%	40%	84%	54%	86%	75%	88%	25%
		B		B		B				B	
Unimportant	6	2	2	3	1	3	1	2	-	1	2
	6%	3%	40%	4%	20%	5%	8%	4%	-	1%	25%
			A							A	

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Help with recruitment

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	22	9	4	4	5	9	8	13	3	4	4	8	9	2	3	6	11	4
	21%	29%	15%	17%	20%	36%	29%	27%	13%	19%	24%	29%	20%	13%	21%	27%	23%	15%
					d													
Fairly important	43	15	11	6	11	10	8	17	13	12	8	11	19	5	6	9	14	14
	41%	48%	42%	26%	44%	40%	29%	35%	54%	57%	47%	39%	42%	33%	43%	41%	29%	52%
						b			Bc									b
Neither important nor unimportant	30	6	9	9	6	3	7	13	6	5	3	6	12	7	4	7	17	5
	29%	19%	35%	39%	24%	12%	25%	27%	25%	24%	18%	21%	27%	47%	29%	32%	35%	19%
														a				
Fairly unimportant	7	1	1	3	2	3	3	5	1	-	2	3	3	1	-	-	4	3
	7%	3%	4%	13%	8%	12%	11%	10%	4%	-	12%	11%	7%	7%	-	-	8%	11%
Very unimportant	2	-	1	-	1	-	2	1	-	-	-	-	2	-	-	-	1	1
	2%	-	4%	-	4%	-	7%	2%	-	-	-	-	4%	-	-	-	2%	4%
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
											c				b			
Nets																		
Important	65	24	15	10	16	19	16	30	16	16	12	19	28	7	9	15	25	18
	62%	77%	58%	43%	64%	76%	57%	61%	67%	76%	71%	68%	62%	47%	64%	68%	52%	67%
		C																
Unimportant	9	1	2	3	3	3	5	6	1	-	2	3	5	1	-	-	5	4
	9%	3%	8%	13%	12%	12%	18%	12%	4%	-	12%	11%	11%	7%	-	-	10%	15%
						E	e											a

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Help with recruitment

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	22	20	-	20	-	18	1	14	4	20	-
	21%	26%	-	27%	-	29%	8%	27%	25%	27%	-
										b	
Fairly important	43	36	-	36	1	27	4	26	4	34	1
	41%	47%	-	48%	20%	43%	31%	51%	25%	46%	13%
		B						b		b	
Neither important nor unimportant	30	17	4	13	3	16	3	9	6	18	5
	29%	22%	80%	17%	60%	25%	23%	18%	38%	24%	63%
			A		A					A	A
Fairly unimportant	7	3	1	4	1	1	4	1	2	2	2
	7%	4%	20%	5%	20%	2%	31%	2%	13%	3%	25%
						A		a		A	A
Very unimportant	2	1	-	2	-	1	1	1	-	-	-
	2%	1%	-	3%	-	2%	8%	2%	-	-	-
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	65	56	-	56	1	45	5	40	8	54	1
	62%	73%	-	75%	20%	71%	38%	78%	50%	73%	13%
		B		B		B		B		B	
Unimportant	9	4	1	6	1	2	5	2	2	2	2
	9%	5%	20%	8%	20%	3%	38%	4%	13%	3%	25%
						A				A	A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Financial incentives

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	38	14	9	6	9	11	9	19	8	4	5	11	16	4	6	9	16	9
	36%	45%	35%	26%	36%	44%	32%	39%	33%	19%	29%	39%	36%	27%	43%	41%	33%	33%
					e													
Fairly important	36	11	11	8	6	9	11	18	10	12	8	8	15	5	6	10	17	8
	34%	35%	42%	35%	24%	36%	39%	37%	42%	57%	47%	29%	33%	33%	43%	45%	35%	30%
Neither important nor unimportant	21	5	4	5	7	4	7	8	4	3	4	7	8	5	1	2	9	8
	20%	16%	15%	22%	28%	16%	25%	16%	17%	14%	24%	25%	18%	33%	7%	9%	19%	30%
														d				a
Fairly unimportant	8	1	1	3	3	1	1	3	1	2	-	2	6	-	-	1	4	2
	8%	3%	4%	13%	12%	4%	4%	6%	4%	10%	-	7%	13%	-	-	5%	8%	7%
Very unimportant	1	-	1	-	-	-	-	1	-	-	-	-	-	1	-	-	1	-
	1%	-	4%	-	-	-	-	2%	-	-	-	-	-	7%	-	-	2%	-
														b				
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
											c							
Nets																		
Important	74	25	20	14	15	20	20	37	18	16	13	19	31	9	12	19	33	17
	70%	81%	77%	61%	60%	80%	71%	76%	75%	76%	76%	68%	69%	60%	86%	86%	69%	63%
		d														c		
Unimportant	9	1	2	3	3	1	1	4	1	2	-	2	6	1	-	1	5	2
	9%	3%	8%	13%	12%	4%	4%	8%	4%	10%	-	7%	13%	7%	-	5%	10%	7%

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Financial incentives

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	38	35	-	35	-	28	2	25	5	33	-
	36%	45%	-	47%	-	44%	15%	49%	31%	45%	-
		B		B		b				B	
Fairly important	36	27	2	28	2	22	5	17	6	25	3
	34%	35%	40%	37%	40%	35%	38%	33%	38%	34%	38%
Neither important nor unimportant	21	11	1	8	1	9	4	5	3	11	3
	20%	14%	20%	11%	20%	14%	31%	10%	19%	15%	38%
Fairly unimportant	8	4	2	3	2	3	2	3	2	4	2
	8%	5%	40%	4%	40%	5%	15%	6%	13%	5%	25%
			A		A						A
Very unimportant	1	-	-	1	-	1	-	1	-	1	-
	1%	-	-	1%	-	2%	-	2%	-	1%	-
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	74	62	2	63	2	50	7	42	11	58	3
	70%	81%	40%	84%	40%	79%	54%	82%	69%	78%	38%
		B		B		b				B	
Unimportant	9	4	2	4	2	4	2	4	2	5	2
	9%	5%	40%	5%	40%	6%	15%	8%	13%	7%	25%
			A		A						a

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Help finding suitable property

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	26	11	5	5	5	8	10	4	8	5	5	8	8	3	6	6	14	4
	25%	35%	19%	22%	20%	29%	20%	17%	38%	29%	38%	29%	18%	20%	43%	27%	29%	15%
														b				
Fairly important	42	13	12	6	11	9	19	12	9	8	5	11	19	6	4	9	16	15
	40%	42%	46%	26%	44%	32%	39%	50%	43%	47%	38%	39%	42%	40%	29%	41%	33%	56%
																		b
Neither important nor unimportant	27	7	5	9	6	9	14	7	4	4	2	9	11	4	3	5	14	6
	26%	23%	19%	39%	24%	32%	29%	29%	19%	24%	15%	32%	24%	27%	21%	23%	29%	22%
Fairly unimportant	7	-	2	2	3	1	4	-	-	-	-	-	6	1	-	2	2	1
	7%	-	8%	9%	12%	4%	8%	-	-	-	-	-	13%	7%	-	9%	4%	4%
				a									A					
Very unimportant	2	-	2	-	-	1	2	-	-	-	-	-	1	1	-	-	1	1
	2%	-	8%	-	-	4%	4%	-	-	-	-	-	2%	7%	-	-	2%	4%
Don't know	1	-	-	1	-	-	-	1	-	-	1	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	4%	-	-	8%	-	-	-	7%	-	2%	-
											c				b			
Nets																		
Important	68	24	17	11	16	17	29	16	17	13	10	19	27	9	10	15	30	19
	65%	77%	65%	48%	64%	61%	59%	67%	81%	76%	77%	68%	60%	60%	71%	68%	63%	70%
		C							c									
Unimportant	9	-	4	2	3	2	6	-	-	-	-	-	7	2	-	2	3	2
	9%	-	15%	9%	12%	8%	12%	-	-	-	-	-	16%	13%	-	9%	6%	7%
			A		a		de						A	a				

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Help finding suitable property

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	26	24	-	23	-	18	-	17	2	26	-
	25%	31%	-	31%	-	29%	-	33%	13%	35%	-
						B				B	
Fairly important	42	37	-	36	1	31	5	23	7	34	1
	40%	48%	-	48%	20%	49%	38%	45%	44%	46%	13%
										b	
Neither important nor unimportant	27	13	4	12	4	9	7	7	5	11	6
	26%	17%	80%	16%	80%	14%	54%	14%	31%	15%	75%
			A		A		A				A
Fairly unimportant	7	3	1	2	-	4	-	3	2	2	1
	7%	4%	20%	3%	-	6%	-	6%	13%	3%	13%
Very unimportant	2	-	-	2	-	1	1	1	-	1	-
	2%	-	-	3%	-	2%	8%	2%	-	1%	-
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	68	61	-	59	1	49	5	40	9	60	1
	65%	79%	-	79%	20%	78%	38%	78%	56%	81%	13%
						B		b		B	
Unimportant	9	3	1	4	-	5	1	4	2	3	1
	9%	4%	20%	5%	-	8%	8%	8%	13%	4%	13%

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Building a business case for my company

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	25	12	5	3	5	10	8	11	6	8	6	11	8	1	4	5	12	3
	24%	39%	19%	13%	20%	40%	29%	22%	25%	38%	35%	39%	18%	7%	29%	23%	25%	11%
		C										BC						
Fairly important	40	11	14	6	9	8	9	22	11	6	4	10	18	6	5	11	20	8
	38%	35%	54%	26%	36%	32%	32%	45%	46%	29%	24%	36%	40%	40%	36%	50%	42%	30%
			c															
Neither important nor unimportant	30	7	6	10	7	5	10	11	6	6	7	7	13	5	4	5	13	12
	29%	23%	23%	43%	28%	20%	36%	22%	25%	29%	41%	25%	29%	33%	29%	23%	27%	44%
Fairly unimportant	7	1	-	2	4	2	-	3	-	1	-	-	4	3	-	1	1	3
	7%	3%	-	9%	16%	8%	-	6%	-	5%	-	-	9%	20%	-	5%	2%	11%
				B										Ad				b
Very unimportant	2	-	1	1	-	-	1	2	-	-	-	-	2	-	-	-	1	1
	2%	-	4%	4%	-	-	4%	4%	-	-	-	-	4%	-	-	-	2%	4%
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
											c				b			
Nets																		
Important	65	23	19	9	14	18	17	33	17	14	10	21	26	7	9	16	32	11
	62%	74%	73%	39%	56%	72%	61%	67%	71%	67%	59%	75%	58%	47%	64%	73%	67%	41%
		C	C									c				C	C	
Unimportant	9	1	1	3	4	2	1	5	-	1	-	-	6	3	-	1	2	4
	9%	3%	4%	13%	16%	8%	4%	10%	-	5%	-	-	13%	20%	-	5%	4%	15%
													A	Ad				

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Building a business case for my company

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	25	23	-	21	-	19	2	18	3	23	1
	24%	30%	-	28%	-	30%	15%	35%	19%	31%	13%
Fairly important	40	35	1	34	1	26	2	20	8	33	1
	38%	45%	20%	45%	20%	41%	15%	39%	50%	45%	13%
						b				b	
Neither important nor unimportant	30	15	3	15	3	13	7	11	3	14	4
	29%	19%	60%	20%	60%	21%	54%	22%	19%	19%	50%
			A		A		A				A
Fairly unimportant	7	4	1	4	-	5	-	2	2	4	1
	7%	5%	20%	5%	-	8%	-	4%	13%	5%	13%
Very unimportant	2	-	-	1	1	-	2	-	-	-	1
	2%	-	-	1%	20%	-	15%	-	-	-	13%
					A		A				A
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	65	58	1	55	1	45	4	38	11	56	2
	62%	75%	20%	73%	20%	71%	31%	75%	69%	76%	25%
		B		B		B				B	
Unimportant	9	4	1	5	1	5	2	2	2	4	2
	9%	5%	20%	7%	20%	8%	15%	4%	13%	5%	25%
											A

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Establishing and raising the profile of my company

Base: All Respondents

	Respondent location				Operational facilities							Investment type				Job title		
	Total	USA	Australia	Germany	France	R&D	Production/manufacturing	Sales/marketing	Customer services/call centre operation	Back office functions	Purchased entire business	Opened entire business in UK	Merger/acquisition	Joint venture	Green field entry	Expansion of existing operations	Owner	Partner/MD/C-level
	a	b	c	d	a	b	c	d	e	f	g	a	b	c	d	a	b	c
	A	B	C	D	A	B	C	D	E	F	G	A	B	C	D	A	B	C
Significance Level: 90%																		
Significance Level: 95%																		
Total	105	31	26	23	25	28	49	24	21	17	13	28	45	15	14	22	48	27
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	34	14	9	5	6	12	12	16	9	13	7	13	14	3	4	8	18	6
	32%	45%	35%	22%	24%	48%	43%	33%	38%	62%	41%	46%	31%	20%	29%	36%	38%	22%
		c							C		Cd	c						
Fairly important	41	12	14	7	8	9	7	20	9	6	5	10	16	6	7	11	15	10
	39%	39%	54%	30%	32%	36%	25%	41%	38%	29%	29%	36%	36%	40%	50%	50%	31%	37%
						g		G	g									
Neither important nor unimportant	22	3	3	9	7	3	8	10	5	2	5	4	12	5	1	2	12	8
	21%	10%	12%	39%	28%	12%	29%	20%	21%	10%	29%	14%	27%	33%	7%	9%	25%	30%
				AB	a									d				a
Fairly unimportant	6	2	-	1	3	1	-	3	-	-	-	1	2	1	1	1	1	3
	6%	6%	-	4%	12%	4%	-	6%	-	-	-	4%	4%	7%	7%	5%	2%	11%
				b														b
Very unimportant	1	-	-	-	1	-	1	-	-	-	-	-	1	-	-	-	1	-
	1%	-	-	-	4%	-	4%	-	-	-	-	-	2%	-	-	-	2%	-
Don't know	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	1%	-	-	4%	-	-	-	-	4%	-	-	-	-	-	7%	-	2%	-
											c				b			
Nets																		
Important	75	26	23	12	14	21	19	36	18	19	12	23	30	9	11	19	33	16
	71%	84%	88%	52%	56%	84%	68%	73%	75%	90%	71%	82%	67%	60%	79%	86%	69%	59%
		CD	CD							b						C		
Unimportant	7	2	-	1	4	1	1	3	-	-	-	1	3	1	1	1	2	3
	7%	6%	-	4%	16%	4%	4%	6%	-	-	-	4%	7%	7%	7%	5%	4%	11%
				B														

Columns Tested: A,B,C,D - A,B,C,D,E,F,G - A,B,C,D - A,B,C

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Establishing and raising the profile of my company

Base: All Respondents

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Importance of location's cost effectiveness		
	Total	Likely	Unlikely	Likely	Unlikely	Agree	Disagree	Agree	Disagree	Important	Unimportant
Significance Level: 90%		a	b	a	b	a	b	a	b	a	b
Significance Level: 95%		A	B	A	B	A	B	A	B	A	B
Total	105	77	5	75	5	63	13	51	16	74	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	34	32	-	29	-	29	1	23	2	31	1
	32%	42%	-	39%	-	46%	8%	45%	13%	42%	13%
		b		b		B		B			
Fairly important	41	33	-	33	1	23	5	20	7	34	1
	39%	43%	-	44%	20%	37%	38%	39%	44%	46%	13%
		b								b	
Neither important nor unimportant	22	8	3	9	3	8	6	5	6	6	5
	21%	10%	60%	12%	60%	13%	46%	10%	38%	8%	63%
			A		A		A		A		A
Fairly unimportant	6	3	2	3	1	2	1	2	1	3	1
	6%	4%	40%	4%	20%	3%	8%	4%	6%	4%	13%
			A								
Very unimportant	1	1	-	1	-	1	-	1	-	-	-
	1%	1%	-	1%	-	2%	-	2%	-	-	-
Don't know	1	-	-	-	-	-	-	-	-	-	-
	1%	-	-	-	-	-	-	-	-	-	-
Nets											
Important	75	65	-	62	1	52	6	43	9	65	2
	71%	84%	-	83%	20%	83%	46%	84%	56%	88%	25%
		B		B		B		B		B	
Unimportant	7	4	2	4	1	3	1	3	1	3	1
	7%	5%	40%	5%	20%	5%	8%	6%	6%	4%	13%
			A								

Columns Tested: A,B - A,B - A,B - A,B - A,B

Survey of Potential Investors

Q6. How important to you is the following help from investment agencies or local/national government?

Summary table

Base: All Respondents

	Total	Very important	Fairly important	Neither important nor unimportant	Fairly unimportant	Very unimportant	Don't know	Nets	
								Important	Unimportant
		a	b	c	d	e	f	a	b
		A	B	C	D	E	F	A	B
Significance Level: 90%									
Significance Level: 95%									
Help with planning and organisation (red tape etc.)	105	37	41	20	5	1	1	78	6
	100%	35%	39%	19%	5%	1%	1%	74%	6%
Help with recruitment	105	22	43	30	7	2	1	65	9
	100%	21%	41%	29%	7%	2%	1%	62%	9%
Financial incentives	105	38	36	21	8	1	1	74	9
	100%	36%	34%	20%	8%	1%	1%	70%	9%
Help finding suitable property	105	26	42	27	7	2	1	68	9
	100%	25%	40%	26%	7%	2%	1%	65%	9%
Building a business case for my company	105	25	40	30	7	2	1	65	9
	100%	24%	38%	29%	7%	2%	1%	62%	9%
Establishing and raising the profile of my company	105	34	41	22	6	1	1	75	7
	100%	32%	39%	21%	6%	1%	1%	71%	7%

Columns Tested: A,B,C,D,E,F - A,B