

Foreign Direct Investors Study

METHODOLOGY NOTE

ComRes interviewed 105 adults (USA:31, Australia:26, France:25 and Germany:23) adults online between the 5th and 11th July 2013. Data were weighted to be nationally representative of main demographic details. ComRes is a member of the British Polling Council and abides by its rules.

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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				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									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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	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	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	15	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

Significance Level: 90%

Significance Level: 95%

	Likelihood to recommend		Likelihood to re-invest		Regional cities are increasingly attractive		Birmingham attractive alternative to London		Location's cost effectiveness and importance		
	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	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	-	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		Location's cost effectiveness and importance		
	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	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%

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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	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%	-
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			c						
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		Location's cost effectiveness and importance		
	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	40	25
	88%	81%	100%	83%	88%	80%	82%	82%	88%	71%	71%	77%	89%	87%	87%	93%	86%	83%	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		Location's cost effectiveness and importance		
	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	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	24	43	20	17	14	11	22	39	14	13	20	43	22
	86%	74%	92%	96%	84%	86%	88%	83%	81%	82%	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	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
	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	-	-	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

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	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%	
Strongly agree	18	10	4	2	2	7	5	8	5	7	4	4	9	5	1	3	3	11	2	
	17%	32%	15%	9%	8%	28%	18%	16%	21%	33%	24%	31%	32%	11%	7%	21%	14%	23%	7%	
		CD											Bc				c			
Slightly agree	41	11	11	8	11	10	11	18	8	8	8	3	11	16	5	6	9	19	10	
	39%	35%	42%	35%	44%	40%	39%	37%	33%	38%	47%	23%	39%	36%	33%	43%	41%	40%	37%	
Neither agree nor disagree	30	4	9	8	9	6	11	14	6	4	3	5	3	15	8	4	7	12	10	
	29%	13%	35%	35%	36%	24%	39%	29%	25%	19%	18%	38%	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	1	5	7	1	1	3	4	5	
	13%	16%	8%	17%	12%	8%	4%	16%	21%	5%	12%	8%	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	7	20	21	6	9	12	30	12	
	56%	68%	58%	43%	52%	68%	57%	53%	54%	71%	71%	54%	71%	47%	40%	64%	55%	63%	44%	
		c											Bc							
Disagree	15	5	2	5	3	2	1	9	5	1	2	1	5	8	1	1	3	5	5	
	14%	16%	8%	22%	12%	8%	4%	18%	21%	5%	12%	8%	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		Location's cost effectiveness and importance		
	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	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	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		Location's cost effectiveness and importance		
	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				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%
													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?

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		Location's cost effectiveness and importance		
	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											c						
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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	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	16	4	1	8	3	5	6	8	6	5	4	2	8	4	1	3	5	5	6
	15%	13%	4%	35%	12%	20%	21%	16%	25%	24%	24%	15%	29%	9%	7%	21%	23%	10%	22%
				aBd									B						
Slightly agree	37	14	8	3	12	10	12	15	7	9	7	5	11	17	4	4	4	18	10
	35%	45%	31%	13%	48%	40%	43%	31%	29%	43%	41%	38%	39%	38%	27%	29%	18%	38%	37%
		C		C															
Neither agree nor disagree	33	7	10	8	8	6	5	19	5	4	2	4	5	13	8	6	9	15	7
	31%	23%	38%	35%	32%	24%	18%	39%	21%	19%	12%	31%	18%	29%	53%	43%	41%	31%	26%
								bF							Ab	a			
Slightly disagree	14	4	4	4	2	3	4	6	3	1	2	2	2	11	1	-	2	7	4
	13%	13%	15%	17%	8%	12%	14%	12%	13%	5%	12%	15%	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	-
	1%	-	4%	-	-	-	-	-	-	-	6%	-	-	-	7%	-	-	2%	-
											c				b				
Nets																			
Agree	53	18	9	11	15	15	18	23	13	14	11	7	19	21	5	7	9	23	16
	50%	58%	35%	48%	60%	60%	64%	47%	54%	67%	65%	54%	68%	47%	33%	50%	41%	48%	59%
		b		b									bC						
Disagree	18	6	6	4	2	4	5	7	6	3	3	2	4	11	2	-	4	9	4
	17%	19%	23%	17%	8%	16%	18%	14%	25%	14%	18%	15%	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	-	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	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		Location's cost effectiveness and importance		
	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
	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	28	13	5	5	5	12	8	10	7	10	5	12	11	1	3	6	16	4
	27%	42%	19%	22%	20%	48%	29%	20%	29%	48%	29%	43%	24%	7%	21%	27%	33%	15%
		bd				C			C		c	C				c		
Slightly agree	23	7	4	3	9	2	7	13	7	3	5	6	12	2	3	3	9	9
	22%	23%	15%	13%	36%	8%	25%	27%	29%	14%	29%	21%	27%	13%	21%	14%	19%	33%
					bc			a	a		a							
Neither agree nor disagree	38	7	13	9	9	8	10	13	7	7	5	8	14	10	5	9	14	12
	36%	23%	50%	39%	36%	32%	36%	27%	29%	33%	29%	29%	31%	67%	36%	41%	29%	44%
			A											AB				
Slightly disagree	12	3	3	4	2	3	2	10	2	-	1	2	7	1	2	3	7	1
	11%	10%	12%	17%	8%	12%	7%	20%	8%	-	6%	7%	16%	7%	14%	14%	15%	4%
								Eg										
Strongly disagree	4	1	1	2	-	-	1	3	1	1	1	-	1	1	1	1	2	1
	4%	3%	4%	9%	-	-	4%	6%	4%	5%	6%	-	2%	7%	7%	5%	4%	4%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Agree	51	20	9	8	14	14	15	23	14	13	10	18	23	3	6	9	25	13
	49%	65%	35%	35%	56%	56%	54%	47%	58%	62%	59%	64%	51%	20%	43%	41%	52%	48%
		BC										C	C					
Disagree	16	4	4	6	2	3	3	13	3	1	2	2	8	2	3	4	9	2
	15%	13%	15%	26%	8%	12%	11%	27%	13%	5%	12%	7%	18%	13%	21%	18%	19%	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		Location's cost effectiveness and importance		
	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	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	19	35	34	16	1	-	54	17
	100%	18%	33%	32%	15%	1%	-	51%	16%
Uncertainty over the UK's future in the EU is reducing the country's attractiveness as an investment destination	105	16	37	33	14	4	1	53	18
	100%	15%	35%	31%	13%	4%	1%	50%	17%
UK graduates and school leavers have the right skills to allow me to recruit the people I need	105	25	38	33	6	3	-	63	9
	100%	24%	36%	31%	6%	3%	-	60%	9%
The UK government provides sufficient support to potential inward investors	105	18	32	39	14	1	1	50	15
	100%	17%	30%	37%	13%	1%	1%	48%	14%
Regional cities other than London are increasingly attractive as destinations for investment in the UK	105	22	41	29	11	2	-	63	13
	100%	21%	39%	28%	10%	2%	-	60%	12%
I believe that Birmingham is an attractive alternative to London as an investment destination	105	28	23	38	12	4	-	51	16
	100%	27%	22%	36%	11%	4%	-	49%	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			
	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	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		Location's cost effectiveness and importance		
	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	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	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	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		Location's cost effectiveness and importance		
	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
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										
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		
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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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%
								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		Location's cost effectiveness and importance		
	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	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		
	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	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		Location's cost effectiveness and importance		
	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	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	31	12	8	7	4	8	7	13	7	10	4	3	11	15	1	4	6	14	7
	30%	39%	31%	30%	16%	32%	25%	27%	29%	48%	24%	23%	39%	33%	7%	29%	27%	29%	26%
		d							c				C	C					
Fairly important	45	13	10	9	13	13	12	25	12	8	9	8	12	17	9	5	10	22	10
	43%	42%	38%	39%	52%	52%	43%	51%	50%	38%	53%	62%	43%	38%	60%	36%	45%	46%	37%
Neither important nor unimportant	20	6	6	3	5	2	7	7	4	3	4	1	5	7	3	4	5	6	9
	19%	19%	23%	13%	20%	8%	25%	14%	17%	14%	24%	8%	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	11	23	32	10	9	16	36	17
	72%	81%	69%	70%	68%	84%	68%	78%	79%	86%	76%	85%	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		Location's cost effectiveness and importance		
	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		
	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%	
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		Location's cost effectiveness and importance		
	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		Location's cost effectiveness and importance		
	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	105 100%	47 45%	27 26%	22 21%	6 6%	2 2%	1 1%	74 70%	8 8%
The location's quality of life and attractiveness to current / future employees	105 100%	33 31%	34 32%	26 25%	9 9%	2 2%	1 1%	67 64%	11 10%
The general environment and feel of a location	105 100%	38 36%	34 32%	23 22%	7 7%	2 2%	1 1%	72 69%	9 9%
Support from local government and local investment bodies	105 100%	32 30%	48 46%	13 12%	7 7%	4 4%	1 1%	80 76%	11 10%
The location's international links	105 100%	39 37%	36 34%	17 16%	12 11%	- -	1 1%	75 71%	12 11%
Recommendations from external consultants and experts	105 100%	25 24%	38 36%	27 26%	13 12%	1 1%	1 1%	63 60%	14 13%
Access to local talent / recruitment and training programmes	105 100%	31 30%	45 43%	20 19%	7 7%	1 1%	1 1%	76 72%	8 8%
It's seen as a cool or up-and-coming place to be	105 100%	19 18%	37 35%	30 29%	12 11%	6 6%	1 1%	56 53%	18 17%
It provides financial incentives to investors	105 100%	34 32%	38 36%	20 19%	10 10%	2 2%	1 1%	72 69%	12 11%

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