

LCCI – QES Q2 2014

METHODOLOGY NOTE

ComRes interviewed 506 London business decision makers between 19th May and 11th June 2014. Data were weighted to be representative of all London businesses by company size. ComRes is a member of the British Polling Council and abides by its rules.

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QES Q2 2014

Q1 The Airports Commission has shortlisted two sites - Heathrow and Gatwick - as suitable locations for one additional runway to be completed before 2030. Thinking of your needs as a business, which of the two airports would you prefer to be allowed to expand?

Base: All respondents

	Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
272	240	32	53	220	163	109	48	206	18	44	228	99	173	62	204	6
54%	53%	60%	58%	53%	58%	49%	61%	52%	59%	55%	54%	56%	53%	63%	52%	38%
150	135	15	28	122	87	63	22	119	8	21	129	48	102	27	115	8
30%	30%	28%	31%	29%	31%	28%	28%	30%	28%	27%	30%	27%	31%	28%	29%	47%
84	78	6	10	74	32	52	8	72	4	15	69	29	54	8	73	2
17%	17%	12%	11%	18%	11%	23%	10%	18%	14%	18%	16%	17%	17%	9%	19%	15%

QES Q2 2014

Q1 The Airports Commission has shortlisted two sites - Heathrow and Gatwick - as suitable locations for one additional runway to be completed before 2030. Thinking of your needs as a business, which of the two airports would you prefer to be allowed to expand?

Base: All respondents

		Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
	Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Heathrow	272	272	-	173	89	216	51	156	79
	54%	100%	-	60%	48%	56%	52%	56%	52%
Gatwick	150	-	150	73	67	112	30	82	48
	30%	-	100%	25%	36%	29%	31%	29%	32%
Don't know	84	-	-	44	28	56	17	41	25
	17%	-	-	15%	15%	15%	17%	15%	16%

QES Q2 2014

Q1 The Airports Commission has shortlisted two sites - Heathrow and Gatwick - as suitable locations for one additional runway to be completed before 2030. Thinking of your needs as a business, which of the two airports would you prefer to be allowed to expand?

Base: All respondents

	Manufacturing					Services				
Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
506	79	8	-	1	88	354	57	2	5	418
506	88	3	-	*	91	394	19	1	2	415
100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
272	51	2	-	-	53	205	13	1	1	220
54%	58%	65%	-	-	58%	52%	67%	100%	60%	53%
150	27	*	-	*	28	117	4	-	1	122
30%	31%	11%	-	100%	31%	30%	23%	-	40%	29%
84	9	1	-	-	10	72	2	-	-	74
17%	11%	24%	-	-	11%	18%	10%	-	-	18%

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Summary table

Base: All respondents

							Nets		Mean score
	Total	Very important	Fairly important	Not very important	Not at all important	Don't know	Important	Not important	
Quick processing times at departures and arrivals	506 100%	294 58%	144 28%	26 5%	33 7%	9 2%	438 87%	60 12%	1.28
Affordable flight costs	506 100%	284 56%	150 30%	35 7%	30 6%	7 1%	433 86%	65 13%	1.25
Good customer service	506 100%	218 43%	203 40%	45 9%	30 6%	10 2%	421 83%	75 15%	1.08
Easy access to the airport via public transport (e.g. tube, train, bus)	506 100%	310 61%	109 21%	43 8%	36 7%	9 2%	419 83%	79 16%	1.23
The range of direct flights to European / short haul destinations	506 100%	255 50%	148 29%	54 11%	38 8%	11 2%	403 80%	92 18%	1.07
Easy access to the airport via private transport (e.g. car, taxi)	506 100%	185 36%	177 35%	80 16%	54 11%	10 2%	362 71%	135 27%	.72
The range of direct flights to non-European / long haul destinations	506 100%	200 40%	154 30%	81 16%	58 11%	13 3%	354 70%	138 27%	.73
High-quality business lounge facilities	506 100%	77 15%	146 29%	178 35%	97 19%	9 2%	223 44%	274 54%	-.14

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Easy access to the airport via public transport (e.g. tube, train, bus)

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	310	282	28	56	254	186	124	56	238	16	48	262	102	208	63	237	11
		61%	62%	53%	61%	61%	66%	55%	71%	60%	52%	60%	62%	58%	63%	64%	60%	67%
Fairly important	(1.0)	109	93	16	20	88	63	46	15	82	12	20	89	36	72	14	89	5
		21%	21%	29%	22%	21%	22%	20%	19%	21%	41%	25%	21%	21%	22%	15%	23%	33%
Not very important	(-1.0)	43	37	6	10	33	16	27	5	37	1	4	39	21	21	12	30	-
		8%	8%	10%	11%	8%	6%	12%	6%	9%	4%	5%	9%	12%	7%	13%	8%	-
Not at all important	(-2.0)	36	33	3	5	31	14	23	2	34	-	5	31	14	22	7	29	-
		7%	7%	5%	5%	8%	5%	10%	3%	9%	-	6%	7%	8%	7%	7%	7%	-
Don't know		9	7	1	*	8	3	5	1	7	1	4	5	2	6	1	7	-
		2%	2%	3%	*	2%	1%	2%	1%	2%	4%	5%	1%	1%	2%	1%	2%	-
Nets																		
Important		419	375	44	76	342	249	170	71	320	28	67	351	139	280	77	326	16
		83%	83%	82%	84%	83%	88%	76%	90%	81%	92%	84%	82%	79%	85%	79%	83%	100%
Not important		79	70	8	14	64	29	49	7	71	1	9	70	36	43	19	59	-
		16%	16%	15%	16%	16%	10%	22%	9%	18%	4%	11%	16%	20%	13%	20%	15%	-
Mean Score		1.23	1.24	1.17	1.25	1.23	1.41	1.01	1.51	1.16	1.45	1.33	1.22	1.10	1.31	1.17	1.23	1.67

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Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Easy access to the airport via public transport (e.g. tube, train, bus)

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	310	173	100	169	126	229	67	177	96
		61%	64%	67%	58%	68%	60%	68%	64%	63%
Fairly important	(1.0)	109	60	29	67	38	89	17	63	29
		21%	22%	20%	23%	20%	23%	17%	23%	19%
Not very important	(-1.0)	43	24	12	30	11	35	4	26	13
		8%	9%	8%	10%	6%	9%	4%	9%	9%
Not at all important	(-2.0)	36	14	8	18	10	24	11	11	10
		7%	5%	5%	6%	5%	6%	11%	4%	7%
Don't know		9	1	-	6	-	6	-	2	3
		2%	*	-	2%	-	2%	-	1%	2%
Nets										
Important		419	233	130	236	164	319	84	240	124
		83%	86%	87%	81%	89%	83%	85%	86%	82%
Not important		79	38	20	48	21	59	15	36	24
		16%	14%	13%	16%	11%	15%	15%	13%	16%
Mean Score		1.23	1.30	1.35	1.20	1.40	1.23	1.27	1.34	1.25

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Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Easy access to the airport via public transport (e.g. tube, train, bus)

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	310	54	1	-	-	56	243	10	*	1	254
		61%	62%	51%	-	-	61%	62%	51%	39%	40%	61%
Fairly important	(1.0)	109	19	1	-	*	20	82	6	-	1	88
		21%	22%	38%	-	100%	22%	21%	29%	-	40%	21%
Not very important	(-1.0)	43	10	-	-	-	10	30	3	-	-	33
		8%	11%	-	-	-	11%	8%	18%	-	-	8%
Not at all important	(-2.0)	36	5	-	-	-	5	30	*	*	*	31
		7%	5%	-	-	-	5%	8%	2%	61%	20%	8%
Don't know		9	-	*	-	-	*	8	-	-	-	8
		2%	-	11%	-	-	*	2%	-	-	-	2%
Nets												
Important		419	73	3	-	*	76	325	15	*	1	342
		83%	84%	89%	-	100%	84%	83%	80%	39%	80%	83%
Not important		79	14	-	-	-	14	60	4	*	*	64
		16%	16%	-	-	-	16%	15%	20%	61%	20%	16%
Mean Score		1.23	1.24	1.58	-	1.00	1.25	1.24	1.09	-.43	.80	1.23

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Easy access to the airport via private transport (e.g. car, taxi)

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	185	162	22	38	147	84	100	39	134	11	35	149	70	115	46	133	6
		36%	36%	41%	42%	35%	30%	45%	50%	34%	37%	44%	35%	40%	35%	47%	34%	37%
Fairly important	(1.0)	177	160	17	30	147	103	74	24	142	11	20	157	51	126	27	146	5
		35%	35%	32%	33%	35%	37%	33%	31%	36%	37%	25%	37%	29%	38%	27%	37%	30%
Not very important	(-1.0)	80	72	9	17	63	62	18	12	62	6	11	69	32	48	15	61	4
		16%	16%	16%	19%	15%	22%	8%	15%	16%	21%	14%	16%	18%	15%	15%	16%	26%
Not at all important	(-2.0)	54	50	4	6	49	28	27	3	51	1	10	45	21	34	9	44	1
		11%	11%	8%	6%	12%	10%	12%	4%	13%	2%	12%	11%	12%	10%	9%	11%	7%
Don't know		10	8	1	*	9	5	5	1	8	1	4	6	2	7	1	9	-
		2%	2%	3%	*	2%	2%	2%	1%	2%	4%	5%	1%	1%	2%	1%	2%	-
Nets																		
Important		362	322	39	68	294	187	174	63	276	22	55	306	121	240	73	278	11
		71%	71%	73%	75%	71%	67%	78%	80%	70%	74%	69%	72%	69%	73%	74%	71%	67%
Not important		135	122	13	23	112	90	45	15	113	7	21	114	53	82	24	106	5
		27%	27%	24%	25%	27%	32%	20%	18%	29%	22%	26%	27%	30%	25%	24%	27%	33%
Mean Score		.72	.70	.85	.85	.69	.56	.92	1.10	.63	.90	.79	.71	.67	.74	.89	.68	.63

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Easy access to the airport via private transport (e.g. car, taxi)

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	185	122	48	107	70	141	33	109	51
		36%	45%	32%	37%	38%	37%	33%	39%	34%
Fairly important	(1.0)	177	92	52	100	68	131	40	101	56
		35%	34%	35%	34%	37%	34%	41%	36%	37%
Not very important	(-1.0)	80	40	29	48	30	63	13	48	24
		16%	15%	19%	16%	16%	17%	14%	17%	16%
Not at all important	(-2.0)	54	16	21	29	16	40	12	18	17
		11%	6%	14%	10%	9%	11%	12%	6%	11%
Don't know		10	2	-	6	1	7	-	3	3
		2%	1%	-	2%	1%	2%	-	1%	2%
Nets										
Important		362	214	100	207	137	272	73	210	107
		71%	79%	67%	71%	74%	71%	74%	75%	71%
Not important		135	56	50	77	46	104	26	66	41
		27%	21%	33%	26%	25%	27%	26%	24%	27%
Mean Score		.72	.98	.52	.74	.79	.72	.69	.85	.68

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Easy access to the airport via private transport (e.g. car, taxi)

Base: All respondents

			Manufacturing					Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	185	36	2	-	-	38	138	8	*	*	147
		36%	41%	65%	-	-	42%	35%	39%	39%	20%	35%
Fairly important	(1.0)	177	29	1	-	-	30	139	7	-	1	147
		35%	33%	24%	-	-	33%	35%	35%	-	60%	35%
Not very important	(-1.0)	80	17	-	-	*	17	59	5	-	-	63
		16%	19%	-	-	100%	19%	15%	24%	-	-	15%
Not at all important	(-2.0)	54	6	-	-	-	6	47	*	*	*	49
		11%	7%	-	-	-	6%	12%	2%	61%	20%	12%
Don't know		10	-	*	-	-	*	9	-	-	-	9
		2%	-	11%	-	-	*	2%	-	-	-	2%
Nets												
Important		362	65	3	-	-	68	278	14	*	1	294
		71%	74%	89%	-	-	75%	71%	74%	39%	80%	71%
Not important		135	22	-	-	*	23	106	5	*	*	112
		27%	26%	-	-	100%	25%	27%	26%	61%	20%	27%
Mean Score		.72	.83	1.73	-	-1.00	.85	.68	.86	-.43	.60	.69

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

High-quality business lounge facilities

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	77	68	9	14	63	46	31	15	54	8	16	61	24	53	10	61	6
		15%	15%	17%	16%	15%	16%	14%	19%	14%	28%	20%	14%	14%	16%	10%	16%	37%
Fairly important	(1.0)	146	127	19	22	124	87	59	26	112	7	26	120	60	86	27	117	2
		29%	28%	36%	24%	30%	31%	26%	34%	28%	24%	32%	28%	34%	26%	28%	30%	15%
Not very important	(-1.0)	178	162	15	35	142	100	77	26	144	8	21	157	56	121	39	134	5
		35%	36%	28%	39%	34%	36%	34%	33%	36%	25%	26%	37%	32%	37%	40%	34%	31%
Not at all important	(-2.0)	97	88	9	18	79	46	51	11	80	6	14	83	34	63	20	74	3
		19%	20%	16%	20%	19%	16%	23%	14%	20%	19%	18%	19%	19%	19%	21%	19%	17%
Don't know		9	7	1	2	7	2	6	1	7	1	3	6	2	6	1	7	-
		2%	2%	3%	2%	2%	1%	3%	1%	2%	4%	3%	1%	1%	2%	1%	2%	-
Nets																		
Important		223	195	28	36	187	133	90	41	166	16	42	181	84	139	37	177	8
		44%	43%	53%	39%	45%	47%	40%	52%	42%	52%	53%	42%	48%	42%	38%	45%	52%
Not important		274	251	24	54	221	147	128	37	224	13	35	239	90	185	59	207	8
		54%	55%	44%	59%	53%	52%	57%	47%	57%	44%	44%	56%	51%	56%	61%	53%	48%
Mean Score		-.14	-.17	.09	-.24	-.12	-.05	-.26	.11	-.22	.17	.11	-.19	-.08	-.18	-.34	-.11	.23

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

High-quality business lounge facilities

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	77	48	19	53	23	58	12	48	18
		15%	18%	13%	18%	13%	15%	12%	17%	12%
Fairly important	(1.0)	146	84	47	82	58	111	32	89	49
		29%	31%	31%	28%	31%	29%	33%	32%	32%
Not very important	(-1.0)	178	91	58	97	72	137	33	100	53
		35%	33%	39%	33%	39%	36%	34%	36%	35%
Not at all important	(-2.0)	97	49	25	52	32	72	21	40	29
		19%	18%	17%	18%	17%	19%	22%	14%	19%
Don't know		9	1	-	6	-	6	-	2	3
		2%	*	-	2%	-	2%	-	1%	2%
Nets										
Important		223	132	66	135	81	169	43	137	66
		44%	48%	44%	47%	44%	44%	44%	49%	44%
Not important		274	139	84	148	103	208	55	140	82
		54%	51%	56%	51%	56%	54%	56%	50%	54%
Mean Score		-.14	-.03	-.16	-.04	-.17	-.14	-.21	.02	-.18

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

High-quality business lounge facilities

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	77	14	-	-	-	14	59	4	-	-	63
		15%	16%	-	-	-	16%	15%	19%	-	-	15%
Fairly important	(1.0)	146	21	1	-	-	22	116	7	1	1	124
		29%	24%	35%	-	-	24%	29%	36%	100%	40%	30%
Not very important	(-1.0)	178	33	2	-	*	35	135	6	-	1	142
		35%	38%	53%	-	100%	39%	34%	32%	-	40%	34%
Not at all important	(-2.0)	97	18	-	-	-	18	76	2	-	*	79
		19%	21%	-	-	-	20%	19%	13%	-	20%	19%
Don't know		9	1	*	-	-	2	7	-	-	-	7
		2%	1%	11%	-	-	2%	2%	-	-	-	2%
Nets												
Important		223	35	1	-	-	36	175	11	1	1	187
		44%	40%	35%	-	-	39%	45%	55%	100%	40%	45%
Not important		274	52	2	-	*	54	211	9	-	1	221
		54%	59%	53%	-	100%	59%	54%	45%	-	60%	53%
Mean Score		-.14	-.24	-.20	-	-1.00	-.24	-.14	.17	1.00	-.40	-.12

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Quick processing times at departures and arrivals

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	294	266	28	52	242	175	119	53	225	16	48	246	98	196	59	224	11
		58%	59%	52%	57%	58%	62%	53%	67%	57%	53%	60%	58%	56%	59%	60%	57%	68%
Fairly important	(1.0)	144	128	16	30	115	85	59	19	116	10	19	125	48	96	29	112	4
		28%	28%	31%	33%	28%	30%	26%	24%	29%	32%	24%	29%	27%	29%	29%	29%	22%
Not very important	(-1.0)	26	21	5	6	21	9	18	5	21	*	4	22	15	11	4	21	1
		5%	5%	9%	6%	5%	3%	8%	7%	5%	1%	6%	5%	9%	3%	4%	5%	7%
Not at all important	(-2.0)	33	30	3	3	30	11	22	1	30	2	6	27	13	20	5	28	*
		7%	7%	6%	3%	7%	4%	10%	1%	8%	5%	8%	6%	7%	6%	5%	7%	2%
Don't know		9	7	1	*	8	2	6	1	5	2	3	6	2	6	1	7	-
		2%	2%	3%	*	2%	1%	3%	1%	1%	8%	3%	1%	1%	2%	1%	2%	-
Nets																		
Important		438	394	44	82	356	259	178	71	341	26	67	371	146	291	87	336	15
		87%	87%	82%	90%	86%	92%	80%	91%	86%	86%	84%	87%	83%	88%	89%	86%	90%
Not important		60	51	8	9	51	20	40	7	51	2	11	49	28	32	9	49	2
		12%	11%	15%	10%	12%	7%	18%	8%	13%	6%	13%	11%	16%	10%	9%	12%	10%
Mean Score		1.28	1.30	1.15	1.35	1.27	1.44	1.08	1.50	1.24	1.39	1.27	1.29	1.17	1.35	1.36	1.26	1.46

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Quick processing times at departures and arrivals

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	294	164	95	167	117	220	60	174	87
		58%	60%	63%	58%	63%	57%	61%	62%	58%
Fairly important	(1.0)	144	84	37	84	51	109	29	75	44
		28%	31%	25%	29%	27%	29%	30%	27%	29%
Not very important	(-1.0)	26	11	9	17	7	21	3	15	8
		5%	4%	6%	6%	4%	5%	3%	5%	5%
Not at all important	(-2.0)	33	10	9	18	8	25	6	13	8
		7%	4%	6%	6%	5%	7%	6%	5%	5%
Don't know		9	2	-	5	1	7	-	2	4
		2%	1%	-	2%	1%	2%	-	1%	3%
Nets										
Important		438	249	132	251	168	330	89	249	132
		87%	91%	88%	86%	91%	86%	91%	89%	87%
Not important		60	21	18	34	16	46	9	28	15
		12%	8%	12%	12%	8%	12%	9%	10%	10%
Mean Score		1.28	1.41	1.33	1.28	1.42	1.27	1.36	1.38	1.33

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Quick processing times at departures and arrivals

Base: All respondents

			Manufacturing					Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	294	50	2	-	-	52	230	10	-	1	242
		58%	57%	65%	-	-	57%	58%	54%	-	60%	58%
Fairly important	(1.0)	144	29	1	-	*	30	108	6	*	*	115
		28%	33%	24%	-	100%	33%	28%	29%	39%	20%	28%
Not very important	(-1.0)	26	6	-	-	-	6	18	2	*	-	21
		5%	7%	-	-	-	6%	5%	13%	61%	-	5%
Not at all important	(-2.0)	33	3	-	-	-	3	29	1	-	*	30
		7%	3%	-	-	-	3%	7%	4%	-	20%	7%
Don't know		9	-	*	-	-	*	8	-	-	-	8
		2%	-	11%	-	-	*	2%	-	-	-	2%
Nets												
Important		438	79	3	-	*	82	338	16	*	1	356
		87%	90%	89%	-	100%	90%	86%	83%	39%	80%	86%
Not important		60	9	-	-	-	9	47	3	*	*	51
		12%	10%	-	-	-	10%	12%	17%	61%	20%	12%
Mean Score		1.28	1.34	1.73	-	1.00	1.35	1.28	1.16	-21	1.00	1.27

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Good customer service

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	218	197	21	42	176	120	98	38	166	14	45	173	78	140	42	165	11
		43%	44%	39%	46%	42%	43%	44%	48%	42%	47%	57%	41%	44%	42%	43%	42%	68%
Fairly important	(1.0)	203	179	24	38	165	126	77	30	160	13	22	181	64	139	43	156	5
		40%	40%	45%	41%	40%	45%	34%	38%	40%	44%	28%	42%	36%	42%	44%	40%	30%
Not very important	(-1.0)	45	41	5	9	37	21	24	8	36	1	5	40	18	27	6	39	-
		9%	9%	9%	9%	9%	7%	11%	10%	9%	4%	7%	9%	10%	8%	6%	10%	-
Not at all important	(-2.0)	30	27	2	2	27	10	20	3	26	*	4	25	14	16	6	23	*
		6%	6%	4%	3%	7%	4%	9%	4%	7%	1%	5%	6%	8%	5%	6%	6%	2%
Don't know		10	8	2	*	10	5	5	1	8	1	3	8	2	8	1	9	-
		2%	2%	3%	*	2%	2%	2%	1%	2%	4%	3%	2%	1%	2%	1%	2%	-
Nets																		
Important		421	376	45	80	341	246	175	67	326	27	68	353	142	279	84	321	16
		83%	83%	84%	88%	82%	87%	78%	86%	82%	91%	85%	83%	81%	85%	87%	82%	98%
Not important		75	68	7	11	64	31	44	11	63	2	10	65	32	43	12	63	*
		15%	15%	13%	12%	15%	11%	20%	13%	16%	5%	12%	15%	18%	13%	12%	16%	2%
Mean Score		1.08	1.08	1.10	1.19	1.05	1.17	.96	1.18	1.04	1.37	1.28	1.04	1.00	1.12	1.13	1.04	1.61

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Good customer service

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	218	121	68	118	91	155	50	128	63
		43%	45%	45%	41%	49%	40%	51%	46%	41%
Fairly important	(1.0)	203	119	59	120	73	162	37	108	66
		40%	44%	39%	41%	40%	42%	37%	39%	44%
Not very important	(-1.0)	45	20	16	31	11	37	6	27	14
		9%	7%	10%	11%	6%	10%	6%	10%	9%
Not at all important	(-2.0)	30	10	7	16	7	23	5	12	5
		6%	4%	5%	5%	4%	6%	5%	4%	3%
Don't know		10	3	-	5	2	7	1	3	4
		2%	1%	-	2%	1%	2%	1%	1%	3%
Nets										
Important		421	240	127	238	164	317	86	236	128
		83%	88%	85%	82%	89%	83%	88%	85%	85%
Not important		75	30	23	46	18	60	11	39	19
		15%	11%	15%	16%	10%	16%	11%	14%	12%
Mean Score		1.08	1.19	1.10	1.03	1.26	1.03	1.24	1.14	1.14

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Good customer service

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	218	41	1	-	-	42	168	6	*	1	176
		43%	47%	38%	-	-	46%	43%	33%	39%	60%	42%
Fairly important	(1.0)	203	36	1	-	-	38	156	9	*	*	165
		40%	41%	51%	-	-	41%	40%	47%	61%	20%	40%
Not very important	(-1.0)	45	8	-	-	*	9	34	2	-	*	37
		9%	9%	-	-	100%	9%	9%	12%	-	20%	9%
Not at all important	(-2.0)	30	2	-	-	-	2	26	1	-	-	27
		6%	3%	-	-	-	3%	7%	6%	-	-	7%
Don't know		10	-	*	-	-	*	9	*	-	-	10
		2%	-	11%	-	-	*	2%	2%	-	-	2%
Nets												
Important		421	77	3	-	-	80	324	15	1	1	341
		83%	88%	89%	-	-	88%	82%	80%	100%	80%	82%
Not important		75	11	-	-	*	11	60	3	-	*	64
		15%	12%	-	-	100%	12%	15%	18%	-	20%	15%
Mean Score		1.08	1.20	1.42	-	-1.00	1.19	1.06	.91	1.39	1.20	1.05

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

The range of direct flights to European / short haul destinations

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	255	229	26	46	210	151	104	48	191	17	45	211	85	170	56	190	10
		50%	51%	49%	50%	51%	54%	47%	60%	48%	56%	56%	49%	48%	52%	57%	48%	61%
Fairly important	(1.0)	148	130	18	33	115	79	69	20	122	6	21	127	51	97	24	120	4
		29%	29%	33%	36%	28%	28%	31%	25%	31%	21%	26%	30%	29%	29%	25%	30%	25%
Not very important	(-1.0)	54	48	6	8	45	31	22	6	42	6	5	48	22	31	8	45	1
		11%	11%	11%	9%	11%	11%	10%	8%	10%	19%	6%	11%	13%	9%	8%	11%	7%
Not at all important	(-2.0)	38	36	3	4	35	17	22	3	35	-	7	31	14	25	9	28	1
		8%	8%	5%	4%	8%	6%	10%	4%	9%	-	9%	7%	8%	7%	9%	7%	7%
Don't know		11	10	1	*	11	3	7	2	8	1	3	8	5	6	1	10	-
		2%	2%	3%	*	3%	1%	3%	3%	2%	4%	3%	2%	3%	2%	1%	2%	-
Nets																		
Important		403	359	44	79	324	230	173	67	313	23	65	338	136	267	80	310	14
		80%	79%	82%	87%	78%	82%	77%	85%	79%	77%	82%	79%	77%	81%	82%	79%	85%
Not important		92	84	8	12	80	48	44	10	77	6	12	80	36	56	17	73	2
		18%	18%	16%	13%	19%	17%	20%	12%	19%	19%	15%	19%	20%	17%	17%	19%	15%
Mean Score		1.07	1.06	1.13	1.20	1.04	1.14	.98	1.33	1.01	1.20	1.17	1.05	1.00	1.10	1.14	1.04	1.24

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

The range of direct flights to European / short haul destinations

Base: All respondents

		Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
Total		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280 147	292 180		381 99		283 150	
Weighted Total		506	272 150	290 185		383 98		278 151	
		100%	100% 100%	100% 100%		100% 100%		100% 100%	
Very important	(2.0)	255	153 74	138 106		188 55		149 82	
		50%	56% 49%	47% 57%		49% 56%		53% 54%	
Fairly important	(1.0)	148	83 43	91 49		116 25		90 39	
		29%	31% 28%	31% 27%		30% 25%		32% 26%	
Not very important	(-1.0)	54	27 16	32 19		41 10		23 18	
		11%	10% 11%	11% 10%		11% 10%		8% 12%	
Not at all important	(-2.0)	38	9 16	20 10		29 8		13 9	
		8%	3% 11%	7% 6%		8% 8%		5% 6%	
Don't know		11	1 1	9 -		9 1		4 3	
		2%	* 1%	3% -		2% 1%		1% 2%	
Nets									
Important		403	236 116	229 155		304 80		238 121	
		80%	87% 78%	79% 84%		79% 81%		86% 80%	
Not important		92	35 32	53 29		70 17		36 27	
		18%	13% 21%	18% 16%		18% 18%		13% 18%	
Mean Score		1.07	1.27 .95	1.04 1.20		1.05 1.13		1.23 1.13	

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

The range of direct flights to European / short haul destinations

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	255	44	2	-	-	46	198	11	*	1	210
		50%	50%	65%	-	-	50%	50%	59%	39%	40%	51%
Fairly important	(1.0)	148	32	1	-	*	33	109	5	-	*	115
		29%	36%	24%	-	100%	36%	28%	25%	-	20%	28%
Not very important	(-1.0)	54	8	-	-	-	8	42	2	*	*	45
		11%	10%	-	-	-	9%	11%	13%	61%	20%	11%
Not at all important	(-2.0)	38	4	-	-	-	4	34	1	-	*	35
		8%	4%	-	-	-	4%	9%	3%	-	20%	8%
Don't know		11	-	*	-	-	*	11	-	-	-	11
		2%	-	11%	-	-	*	3%	-	-	-	3%
Nets												
Important		403	76	3	-	*	79	307	16	*	1	324
		80%	86%	89%	-	100%	87%	78%	84%	39%	60%	78%
Not important		92	12	-	-	-	12	76	3	*	1	80
		18%	14%	-	-	-	13%	19%	16%	61%	40%	19%
Mean Score		1.07	1.19	1.73	-	1.00	1.20	1.03	1.23	.18	.40	1.04

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

The range of direct flights to non-European / long haul destinations

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	200	177	24	44	157	122	78	39	148	14	40	160	69	131	37	154	9
		40%	39%	44%	48%	38%	43%	35%	49%	37%	45%	50%	38%	39%	40%	38%	39%	53%
Fairly important	(1.0)	154	137	17	25	129	84	70	20	126	8	18	137	58	96	32	117	5
		30%	30%	32%	28%	31%	30%	31%	26%	32%	27%	22%	32%	33%	29%	33%	30%	30%
Not very important	(-1.0)	81	73	8	15	66	40	41	13	61	7	10	70	27	53	16	63	1
		16%	16%	14%	16%	16%	14%	18%	16%	15%	23%	13%	17%	15%	16%	17%	16%	7%
Not at all important	(-2.0)	58	54	4	7	51	30	28	5	53	*	8	50	18	40	10	46	2
		11%	12%	7%	8%	12%	11%	12%	6%	13%	1%	10%	12%	10%	12%	11%	12%	10%
Don't know		13	12	1	*	13	6	7	2	10	1	4	10	5	9	1	12	-
		3%	3%	3%	*	3%	2%	3%	3%	3%	4%	5%	2%	3%	3%	1%	3%	-
Nets																		
Important		354	314	41	69	286	206	148	59	274	22	58	296	127	227	70	272	13
		70%	69%	76%	76%	69%	73%	66%	75%	69%	71%	73%	70%	72%	69%	71%	69%	83%
Not important		138	127	12	22	116	70	69	18	113	7	18	120	45	93	27	109	3
		27%	28%	22%	24%	28%	25%	31%	22%	29%	25%	23%	28%	25%	28%	27%	28%	17%
Mean Score		.73	.70	.93	.93	.68	.83	.60	.99	.66	.94	.95	.69	.77	.70	.72	.71	1.09

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

The range of direct flights to non-European / long haul destinations

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	200	133	54	123	75	151	40	118	63
		40%	49%	36%	43%	40%	39%	41%	42%	42%
Fairly important	(1.0)	154	76	51	87	59	124	23	96	41
		30%	28%	34%	30%	32%	32%	23%	35%	27%
Not very important	(-1.0)	81	42	19	42	32	54	23	40	27
		16%	15%	13%	14%	17%	14%	23%	14%	18%
Not at all important	(-2.0)	58	20	24	28	18	45	11	20	16
		11%	7%	16%	10%	10%	12%	11%	7%	11%
Don't know		13	1	2	10	1	10	1	4	3
		3%	*	2%	3%	1%	3%	1%	1%	2%
Nets										
Important		354	209	104	210	133	275	63	214	105
		70%	77%	70%	72%	72%	72%	64%	77%	69%
Not important		138	62	43	70	50	99	34	60	43
		27%	23%	29%	24%	27%	26%	35%	22%	29%
Mean Score		.73	.96	.62	.84	.76	.76	.60	.92	.73

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

The range of direct flights to non-European / long haul destinations

Base: All respondents

			Manufacturing					Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	200	43	1	-	-	44	146	9	*	1	157
		40%	49%	38%	-	-	48%	37%	49%	39%	60%	38%
Fairly important	(1.0)	154	24	1	-	*	25	123	6	*	*	129
		30%	27%	38%	-	100%	28%	31%	30%	61%	20%	31%
Not very important	(-1.0)	81	15	-	-	-	15	63	3	-	-	66
		16%	17%	-	-	-	16%	16%	15%	-	-	16%
Not at all important	(-2.0)	58	7	*	-	-	7	49	1	-	*	51
		11%	7%	13%	-	-	8%	13%	6%	-	20%	12%
Don't know		13	-	*	-	-	*	13	-	-	-	13
		3%	-	11%	-	-	*	3%	-	-	-	3%
Nets												
Important		354	66	2	-	*	69	268	15	1	1	286
		70%	76%	76%	-	100%	76%	68%	79%	100%	80%	69%
Not important		138	21	*	-	-	22	112	4	-	*	116
		27%	24%	13%	-	-	24%	28%	21%	-	20%	28%
Mean Score		.73	.92	.97	-	1.00	.93	.66	1.02	1.39	1.00	.68

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Affordable flight costs

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	284	255	28	51	233	159	125	43	224	16	48	236	93	190	61	211	11
		56%	56%	52%	56%	56%	56%	56%	55%	57%	53%	60%	55%	53%	58%	63%	54%	68%
Fairly important	(1.0)	150	134	16	29	121	92	57	29	110	10	22	127	51	99	23	122	5
		30%	30%	30%	32%	29%	33%	26%	37%	28%	35%	28%	30%	29%	30%	23%	31%	32%
Not very important	(-1.0)	35	30	6	7	28	19	17	4	29	2	3	33	17	18	6	30	-
		7%	7%	10%	8%	7%	7%	7%	5%	7%	8%	3%	8%	10%	6%	6%	8%	-
Not at all important	(-2.0)	30	27	3	4	26	9	21	2	28	-	5	25	13	17	6	24	-
		6%	6%	5%	5%	6%	3%	9%	3%	7%	-	6%	6%	7%	5%	7%	6%	-
Don't know		7	6	1	*	7	2	5	1	5	1	3	5	2	5	1	6	-
		1%	1%	3%	*	2%	1%	2%	1%	1%	4%	3%	1%	1%	2%	1%	2%	-
Nets																		
Important		433	389	44	79	354	251	182	72	335	27	70	363	145	289	84	333	16
		86%	86%	82%	87%	85%	89%	81%	91%	84%	88%	87%	85%	82%	88%	86%	85%	100%
Not important		65	57	8	11	54	28	37	6	57	2	7	58	30	36	12	53	-
		13%	13%	15%	12%	13%	10%	17%	8%	14%	8%	9%	14%	17%	11%	13%	14%	-
Mean Score		1.25	1.25	1.18	1.26	1.24	1.33	1.13	1.37	1.21	1.39	1.36	1.23	1.12	1.31	1.31	1.21	1.68

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Affordable flight costs

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	284	150	92	156	115	206	63	155	88
		56%	55%	61%	54%	62%	54%	64%	56%	59%
Fairly important	(1.0)	150	94	40	93	50	122	24	92	42
		30%	34%	27%	32%	27%	32%	25%	33%	28%
Not very important	(-1.0)	35	21	8	20	13	27	5	20	11
		7%	8%	5%	7%	7%	7%	5%	7%	7%
Not at all important	(-2.0)	30	7	10	16	7	23	6	10	7
		6%	2%	7%	5%	4%	6%	6%	4%	4%
Don't know		7	1	-	5	-	6	-	2	3
		1%	*	-	2%	-	2%	-	1%	2%
Nets										
Important		433	244	132	249	165	328	87	247	131
		86%	89%	88%	86%	89%	86%	89%	89%	87%
Not important		65	28	18	36	20	49	11	29	17
		13%	10%	12%	12%	11%	13%	11%	11%	12%
Mean Score		1.25	1.33	1.31	1.24	1.37	1.22	1.36	1.31	1.32

QES Q2 2014

Q2 Thinking about your business's choice of airport, how important, if at all, are each of the following to the decision about which airport(s) to use?

Affordable flight costs

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	284	49	1	-	-	51	222	9	*	1	233
		56%	56%	51%	-	-	56%	57%	48%	39%	60%	56%
Fairly important	(1.0)	150	27	1	-	*	29	114	6	-	*	121
		30%	31%	38%	-	100%	32%	29%	32%	-	20%	29%
Not very important	(-1.0)	35	7	-	-	-	7	24	3	*	*	28
		7%	8%	-	-	-	8%	6%	17%	61%	20%	7%
Not at all important	(-2.0)	30	4	-	-	-	4	25	*	-	-	26
		6%	5%	-	-	-	5%	6%	2%	-	-	6%
Don't know		7	-	*	-	-	*	7	-	-	-	7
		1%	-	11%	-	-	*	2%	-	-	-	2%
Nets												
Important		433	76	3	-	*	79	337	15	*	1	354
		86%	87%	89%	-	100%	87%	86%	81%	39%	80%	85%
Not important		65	11	-	-	-	11	50	4	*	*	54
		13%	13%	-	-	-	12%	13%	19%	61%	20%	13%
Mean Score		1.25	1.26	1.58	-	1.00	1.26	1.25	1.08	.18	1.20	1.24

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?

The most beneficial

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total	506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	157 31%	136 30%	21 40%	36 40%	121 29%	90 32%	67 30%	26 33%	119 30%	12 40%	29 36%	128 30%	54 30%	104 31%	29 30%	124 32%	5 31%
Improved rail access into Gatwick	95 19%	85 19%	10 19%	14 16%	81 19%	54 19%	40 18%	13 17%	76 19%	6 20%	16 20%	79 19%	35 20%	60 18%	16 17%	74 19%	5 30%
Extended runway operating hours at Heathrow (including early morning arrivals)	84 17%	78 17%	7 13%	13 14%	72 17%	47 17%	38 17%	12 15%	67 17%	5 17%	8 10%	76 18%	25 14%	59 18%	21 22%	61 15%	2 15%
Improved terminal facilities at City Airport	57 11%	50 11%	7 12%	10 11%	47 11%	35 13%	21 9%	10 13%	42 11%	4 14%	13 16%	44 10%	20 11%	37 11%	11 11%	45 11%	1 7%
Improved rail access into Stansted	41 8%	37 8%	4 8%	8 9%	33 8%	25 9%	16 7%	9 12%	30 8%	2 5%	7 9%	34 8%	19 11%	23 7%	4 4%	35 9%	2 10%
None of the above	71 14%	67 15%	4 8%	10 11%	61 15%	29 10%	42 19%	8 10%	62 16%	1 4%	8 9%	64 15%	25 14%	47 14%	16 17%	54 14%	1 7%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?

The most beneficial

Base: All respondents

	Total	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	157 31%	125 46%	22 14%	92 32%	56 30%	128 33%	26 26%	96 34%	39 26%
Improved rail access into Gatwick	95 19%	23 8%	57 38%	47 16%	43 23%	68 18%	20 20%	59 21%	25 16%
Extended runway operating hours at Heathrow (including early morning arrivals)	84 17%	70 26%	8 6%	54 19%	26 14%	68 18%	15 15%	48 17%	30 20%
Improved terminal facilities at City Airport	57 11%	29 10%	17 11%	34 12%	22 12%	40 11%	13 14%	31 11%	15 10%
Improved rail access into Stansted	41 8%	12 4%	18 12%	22 7%	20 11%	28 7%	11 11%	19 7%	19 12%
None of the above	71 14%	15 6%	27 18%	41 14%	18 10%	52 13%	14 14%	26 9%	24 16%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?

The most beneficial

Base: All respondents

	Total	Manufacturing					Services				
		1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	506	79	8	-	1	88	354	57	2	5	418
Weighted Total	506	88	3	-	*	91	394	19	1	2	415
	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	157	35	1	-	-	36	112	8	*	1	121
	31%	40%	38%	-	-	40%	28%	42%	61%	60%	29%
Improved rail access into Gatwick	95	14	1	-	-	14	77	3	-	*	81
	19%	15%	24%	-	-	16%	20%	17%	-	20%	19%
Extended runway operating hours at Heathrow (including early morning arrivals)	84	12	*	-	-	13	69	3	-	-	72
	17%	14%	11%	-	-	14%	18%	14%	-	-	17%
Improved terminal facilities at City Airport	57	10	-	-	-	10	44	2	-	*	47
	11%	11%	-	-	-	11%	11%	13%	-	20%	11%
Improved rail access into Stansted	41	7	1	-	-	8	32	1	*	-	33
	8%	8%	27%	-	-	9%	8%	6%	39%	-	8%
None of the above	71	10	-	-	*	10	60	1	-	-	61
	14%	11%	-	-	100%	11%	15%	8%	-	-	15%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?

The second most beneficial

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total	506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Extended runway operating hours at Heathrow (including early morning arrivals)	117	98	19	25	92	64	53	18	88	10	23	93	45	72	25	88	4
	23%	22%	35%	27%	22%	23%	24%	23%	22%	34%	29%	22%	25%	22%	25%	22%	26%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	99	91	8	20	78	51	47	13	78	7	9	89	32	67	19	75	5
	19%	20%	15%	22%	19%	18%	21%	17%	20%	25%	12%	21%	18%	20%	19%	19%	30%
Improved rail access into Gatwick	87	79	8	13	74	57	29	19	63	4	16	70	30	56	17	67	2
	17%	17%	15%	14%	18%	20%	13%	24%	16%	14%	20%	17%	17%	17%	17%	17%	15%
Improved terminal facilities at City Airport	68	61	7	10	58	43	25	9	55	4	9	58	19	49	9	55	4
	13%	13%	12%	11%	14%	15%	11%	12%	14%	12%	12%	14%	11%	15%	9%	14%	22%
Improved rail access into Stansted	59	53	6	12	47	33	26	11	45	3	12	47	23	35	12	47	-
	12%	12%	11%	13%	11%	12%	12%	14%	11%	9%	15%	11%	13%	11%	12%	12%	-
None of the above	78	72	7	11	67	34	44	8	68	2	10	69	28	50	17	60	1
	15%	16%	12%	12%	16%	12%	20%	11%	17%	6%	12%	16%	16%	15%	17%	15%	7%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?

The second most beneficial

Base: All respondents

	Total	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Extended runway operating hours at Heathrow (including early morning arrivals)	117	92	12	76	35	95	16	76	26
	23%	34%	8%	26%	19%	25%	16%	27%	17%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	99	65	23	57	39	76	21	55	32
	19%	24%	15%	20%	21%	20%	21%	20%	21%
Improved rail access into Gatwick	87	45	29	50	34	67	17	43	32
	17%	16%	19%	17%	18%	18%	18%	16%	21%
Improved terminal facilities at City Airport	68	28	32	34	30	48	16	38	23
	13%	10%	21%	12%	16%	12%	17%	14%	15%
Improved rail access into Stansted	59	25	24	32	24	42	12	37	12
	12%	9%	16%	11%	13%	11%	12%	13%	8%
None of the above	78	18	30	41	23	55	16	29	26
	15%	7%	20%	14%	12%	14%	16%	11%	17%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?

The second most beneficial

Base: All respondents

	Manufacturing						Services				
	Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	506	79	8	-	1	88	354	57	2	5	418
Weighted Total	506	88	3	-	*	91	394	19	1	2	415
	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Extended runway operating hours at Heathrow (including early morning arrivals)	117	23	1	-	-	25	83	8	-	1	92
	23%	26%	51%	-	-	27%	21%	41%	-	40%	22%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	99	20	*	-	-	20	76	2	-	-	78
	19%	23%	13%	-	-	22%	19%	12%	-	-	19%
Improved rail access into Gatwick	87	12	*	-	-	13	72	1	-	*	74
	17%	14%	13%	-	-	14%	18%	6%	-	20%	18%
Improved terminal facilities at City Airport	68	10	*	-	-	10	54	3	1	-	58
	13%	11%	11%	-	-	11%	14%	16%	100%	-	14%
Improved rail access into Stansted	59	12	*	-	-	12	44	2	-	*	47
	12%	13%	11%	-	-	13%	11%	11%	-	20%	11%
None of the above	78	11	-	-	*	11	64	3	-	*	67
	15%	12%	-	-	100%	12%	16%	14%	-	20%	16%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?)

The most/second most beneficial

Base: All respondents

	Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
256	227	29	57	200	142	114	39	197	20	38	218	86	170	48	198	10
51%	50%	55%	62%	48%	50%	51%	50%	50%	65%	48%	51%	48%	52%	49%	51%	61%
201	175	25	37	163	110	90	30	155	15	31	170	70	131	46	148	7
40%	39%	47%	41%	39%	39%	40%	38%	39%	51%	39%	40%	39%	40%	47%	38%	41%
181	164	18	27	154	112	70	32	139	10	32	150	65	117	33	142	7
36%	36%	33%	30%	37%	40%	31%	40%	35%	34%	40%	35%	37%	35%	34%	36%	44%
124	111	13	20	104	78	46	19	97	8	22	102	39	85	19	100	5
25%	25%	25%	22%	25%	28%	21%	25%	24%	26%	28%	24%	22%	26%	20%	26%	30%
100	90	10	20	80	58	42	21	75	4	19	81	42	58	16	82	2
20%	20%	19%	22%	19%	21%	19%	26%	19%	14%	24%	19%	24%	18%	16%	21%	10%
71	67	4	10	61	29	42	8	62	1	8	64	25	47	16	54	1
14%	15%	8%	11%	15%	10%	19%	10%	16%	4%	9%	15%	14%	14%	17%	14%	7%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?)

The most/second most beneficial

Base: All respondents

	Total	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	256	189	45	149	95	204	46	151	71
	51%	70%	30%	52%	51%	53%	47%	54%	47%
Extended runway operating hours at Heathrow (including early morning arrivals)	201	162	20	130	61	163	31	124	57
	40%	59%	14%	45%	33%	43%	31%	45%	37%
Improved rail access into Gatwick	181	67	86	97	77	135	37	102	57
	36%	25%	58%	34%	42%	35%	38%	37%	38%
Improved terminal facilities at City Airport	124	57	49	68	53	88	30	69	38
	25%	21%	33%	23%	28%	23%	30%	25%	25%
Improved rail access into Stansted	100	36	42	53	44	69	23	55	30
	20%	13%	28%	18%	24%	18%	23%	20%	20%
None of the above	71	15	27	41	18	52	14	26	24
	14%	6%	18%	14%	10%	13%	14%	9%	16%

QES Q2 2014

Q3 The Airports Commission and the Government are considering a range of short- and medium-term measures to increase airport capacity in the South East while a new runway is built. Which of the following options, if any, would be most beneficial to your business?)

The most/second most beneficial

Base: All respondents

	Manufacturing						Services				
	Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	506	79	8	-	1	88	354	57	2	5	418
Weighted Total	506	88	3	-	*	91	394	19	1	2	415
	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
More efficient runway operations at Heathrow (including 'mixed mode' operations increasing the number of flights by allowing planes to take off and land from the same runway)	256	55	1	-	-	57	188	10	*	1	200
	51%	63%	51%	-	-	62%	48%	54%	61%	60%	48%
Extended runway operating hours at Heathrow (including early morning arrivals)	201	36	2	-	-	37	152	11	-	1	163
	40%	41%	62%	-	-	41%	39%	55%	-	40%	39%
Improved rail access into Gatwick	181	26	1	-	-	27	149	4	-	1	154
	36%	30%	38%	-	-	30%	38%	23%	-	40%	37%
Improved terminal facilities at City Airport	124	20	*	-	-	20	98	6	1	*	104
	25%	22%	11%	-	-	22%	25%	29%	100%	20%	25%
Improved rail access into Stansted	100	19	1	-	-	20	76	3	*	*	80
	20%	21%	38%	-	-	22%	19%	17%	39%	20%	19%
None of the above	71	10	-	-	*	10	60	1	-	-	61
	14%	11%	-	-	100%	11%	15%	8%	-	-	15%

QES Q2 2014

Q4 Thinking of your needs as a business, do you support or oppose Transport for London's plans to close London Underground ticket offices, in order to help deliver 24-hour tube services and increase investment?

Base: All respondents

	Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
127	113	13	19	107	76	50	23	96	7	23	103	43	84	24	97	5
25%	25%	24%	21%	26%	27%	22%	30%	24%	22%	29%	24%	24%	25%	25%	25%	30%
163	143	20	34	130	85	79	31	123	10	29	134	55	108	35	122	6
32%	32%	37%	37%	31%	30%	35%	39%	31%	34%	36%	31%	31%	33%	36%	31%	39%
118	109	9	24	94	73	45	15	102	1	14	104	51	67	24	94	-
23%	24%	17%	26%	23%	26%	20%	19%	26%	5%	17%	24%	29%	20%	24%	24%	-
67	61	6	9	58	40	27	7	50	10	9	58	19	48	12	52	4
13%	13%	11%	10%	14%	14%	12%	9%	13%	34%	12%	14%	11%	15%	12%	13%	24%
31	26	5	5	26	8	24	3	26	2	5	27	9	23	3	27	1
6%	6%	9%	6%	6%	3%	10%	4%	7%	6%	6%	6%	5%	7%	3%	7%	7%
290	257	33	53	237	161	129	54	219	17	52	238	98	192	59	219	11
57%	57%	62%	58%	57%	57%	58%	69%	55%	56%	65%	56%	56%	58%	61%	56%	69%
185	169	15	33	152	113	72	22	152	12	23	162	70	115	35	146	4
37%	37%	29%	36%	37%	40%	32%	27%	38%	39%	29%	38%	40%	35%	36%	37%	24%

QES Q2 2014

Q4 Thinking of your needs as a business, do you support or oppose Transport for London's plans to close London Underground ticket offices, in order to help deliver 24-hour tube services and increase investment?

Base: All respondents

	Total	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly support	127	80	29	127	-	121	5	86	31
	25%	29%	19%	44%	-	31%	5%	31%	21%
Tend to support	163	93	44	163	-	138	19	86	44
	32%	34%	29%	56%	-	36%	19%	31%	29%
Tend to oppose	118	57	44	-	118	86	25	65	39
	23%	21%	30%	-	64%	23%	25%	23%	26%
Strongly oppose	67	32	23	-	67	20	42	30	31
	13%	12%	15%	-	36%	5%	43%	11%	21%
Don't know	31	10	10	-	-	19	8	12	5
	6%	4%	7%	-	-	5%	8%	4%	3%
Nets									
Support	290	173	73	290	-	258	24	172	75
	57%	63%	49%	100%	-	67%	24%	62%	50%
Oppose	185	89	67	-	185	106	67	95	71
	37%	33%	45%	-	100%	28%	68%	34%	47%

QES Q2 2014

Q4 Thinking of your needs as a business, do you support or oppose Transport for London's plans to close London Underground ticket offices, in order to help deliver 24-hour tube services and increase investment?

Base: All respondents

	Manufacturing						Services				
	Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	506	79	8	-	1	88	354	57	2	5	418
Weighted Total	506	88	3	-	*	91	394	19	1	2	415
	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Strongly support	127	18	1	-	-	19	102	5	-	1	107
	25%	21%	27%	-	-	21%	26%	25%	-	40%	26%
Tend to support	163	32	2	-	-	34	123	6	-	*	130
	32%	36%	60%	-	-	37%	31%	33%	-	20%	31%
Tend to oppose	118	23	*	-	-	24	89	5	*	*	94
	23%	26%	13%	-	-	26%	23%	25%	61%	20%	23%
Strongly oppose	67	9	-	-	-	9	56	2	*	-	58
	13%	11%	-	-	-	10%	14%	9%	39%	-	14%
Don't know	31	5	-	-	*	5	24	2	-	*	26
	6%	5%	-	-	100%	6%	6%	9%	-	20%	6%
Nets											
Support	290	50	2	-	-	53	225	11	-	1	237
	57%	57%	87%	-	-	58%	57%	57%	-	60%	57%
Oppose	185	33	*	-	-	33	144	7	1	*	152
	37%	37%	13%	-	-	36%	37%	34%	100%	20%	37%

QES Q2 2014

Q5 Members of the TSSA and RMT unions working for London Underground went on strike for 48 hours on 4th - 6th February 2014, and members of the RMT went on strike for 48 hours on 28th - 30th April 2014. How, if at all, did either of the two strikes impact on your business?

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total	506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Reduced productivity due to staff being late to work or having to leave early	129	99	30	19	110	88	42	33	87	10	35	94	53	77	30	90	9
	26%	22%	57%	21%	27%	31%	19%	42%	22%	32%	44%	22%	30%	23%	31%	23%	56%
Loss of business due to cancelled meetings or fewer customers	121	105	16	16	105	69	52	22	94	5	27	95	45	77	20	99	2
	24%	23%	30%	17%	25%	24%	23%	28%	24%	18%	33%	22%	25%	23%	21%	25%	15%
Reduced productivity due to staff being unable to come to work	91	74	17	17	75	62	30	24	63	5	22	69	38	53	20	69	2
	18%	16%	32%	18%	18%	22%	13%	30%	16%	16%	27%	16%	22%	16%	20%	18%	15%
Other	11	10	1	4	7	4	7	1	10	-	2	9	7	4	1	9	-
	2%	2%	2%	5%	2%	1%	3%	1%	3%	-	2%	2%	4%	1%	1%	2%	-
My business was not affected by the strike	276	264	12	54	222	139	137	28	230	19	24	252	84	192	53	217	6
	55%	58%	23%	59%	53%	49%	61%	35%	58%	62%	30%	59%	48%	58%	54%	55%	37%
Don't know	2	1	1	*	2	*	2	2	1	-	2	*	2	*	-	1	1
	*	*	2%	*	*	*	1%	2%	*	-	2%	*	1%	*	-	*	7%

QES Q2 2014

Q5 Members of the TSSA and RMT unions working for London Underground went on strike for 48 hours on 4th - 6th February 2014, and members of the RMT went on strike for 48 hours on 28th - 30th April 2014. How, if at all, did either of the two strikes impact on your business?

Base: All respondents

	Total	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Reduced productivity due to staff being late to work or having to leave early	129	80	35	92	31	114	14	74	40
	26%	29%	23%	32%	17%	30%	14%	27%	27%
Loss of business due to cancelled meetings or fewer customers	121	81	29	89	30	104	13	73	32
	24%	30%	19%	31%	16%	27%	14%	26%	21%
Reduced productivity due to staff being unable to come to work	91	50	33	56	31	67	19	55	26
	18%	19%	22%	19%	17%	17%	19%	20%	17%
Other	11	7	1	8	2	11	-	4	4
	2%	2%	1%	3%	1%	3%	-	1%	3%
My business was not affected by the strike	276	133	83	135	119	193	67	137	89
	55%	49%	55%	47%	64%	50%	68%	49%	59%
Don't know	2	2	-	2	*	2	*	1	*
	*	1%	-	1%	*	*	*	*	*

QES Q2 2014

Q5 Members of the TSSA and RMT unions working for London Underground went on strike for 48 hours on 4th - 6th February 2014, and members of the RMT went on strike for 48 hours on 28th - 30th April 2014. How, if at all, did either of the two strikes impact on your business?

Base: All respondents

	Total	Manufacturing					Services				
		1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	506	79	8	-	1	88	354	57	2	5	418
Weighted Total	506	88	3	-	*	91	394	19	1	2	415
	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Reduced productivity due to staff being late to work or having to leave early	129	17	2	-	-	19	97	11	*	1	110
	26%	20%	62%	-	-	21%	25%	60%	39%	80%	27%
Loss of business due to cancelled meetings or fewer customers	121	15	1	-	*	16	101	4	*	*	105
	24%	17%	27%	-	100%	17%	26%	20%	39%	20%	25%
Reduced productivity due to staff being unable to come to work	91	16	1	-	-	17	67	6	*	1	75
	18%	18%	24%	-	-	18%	17%	33%	39%	60%	18%
Other	11	4	-	-	-	4	7	-	-	-	7
	2%	5%	-	-	-	5%	2%	-	-	-	2%
My business was not affected by the strike	276	54	*	-	-	54	218	4	-	-	222
	55%	61%	13%	-	-	59%	55%	22%	-	-	53%
Don't know	2	-	*	-	-	*	1	*	*	-	2
	*	-	11%	-	-	*	*	2%	61%	-	*

QES Q2 2014

Q6 Approximately how much money, if any, do you estimate the two tube strikes combined cost your business?

Base: All respondents

		Table 1: Recruitment and retention of new employees by business size, industry, location, and expected changes in workforce size																
		Business size			Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Nothing	(0.0)	262	247	15	46	216	130	131	24	220	18	21	240	85	177	50	205	6
		52%	55%	27%	51%	52%	46%	59%	30%	55%	60%	27%	56%	48%	54%	52%	52%	39%
£1,000 or less	(0.5)	91	82	9	10	81	61	30	18	68	5	11	80	27	64	19	67	5
		18%	18%	16%	12%	19%	22%	14%	22%	17%	18%	14%	19%	15%	20%	20%	17%	30%
£1,001 - £5,000	(3.0)	44	38	6	11	33	28	15	10	30	4	14	30	16	28	7	36	1
		9%	8%	10%	12%	8%	10%	7%	13%	7%	13%	17%	7%	9%	9%	7%	9%	7%
£5,001 - £10,000	(7.5)	24	18	6	5	19	16	9	8	16	1	10	15	12	12	5	19	*
		5%	4%	12%	6%	5%	6%	4%	10%	4%	2%	12%	3%	7%	4%	5%	5%	1%
£10,001 - £20,000	(15.0)	7	4	3	1	6	4	2	3	3	1	4	2	2	5	1	5	-
		1%	1%	6%	1%	1%	1%	1%	3%	1%	2%	6%	1%	1%	1%	1%	1%	-
£20,001 - £50,000	(35.0)	2	1	1	1	1	2	1	1	1	-	*	2	1	1	-	2	-
		*	*	2%	1%	*	1%	*	2%	*	-	*	*	1%	*	-	1%	-
£50,001 - £100,000	(75.0)	2	1	1	-	2	2	-	*	2	-	*	2	2	1	-	2	-
		*	*	2%	-	1%	1%	-	1%	*	-	1%	*	1%	*	-	1%	-
More than £100,000	(125.0)	2	-	2	-	2	1	1	1	1	*	*	1	1	1	-	2	-
		*	-	4%	-	*	*	*	1%	*	1%	1%	*	*	*	-	*	-
Don't know		67	57	10	14	53	36	31	14	51	2	18	49	28	39	13	51	4
		13%	13%	19%	16%	13%	13%	14%	18%	13%	5%	23%	12%	16%	12%	13%	13%	22%
Prefer not to say		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Not Stated		4	4	1	2	2	1	4	-	4	-	-	4	4	1	2	3	-
		1%	1%	2%	3%	1%	*	2%	-	1%	-	-	1%	2%	*	2%	1%	-
Net: Any money		173	144	28	28	144	114	59	41	121	11	40	132	60	112	33	134	6
		34%	32%	52%	31%	35%	40%	26%	52%	31%	35%	51%	31%	34%	34%	33%	34%	38%
Mean Score		2.22	1.21	11.44	1.73	2.32	2.65	1.67	4.56	1.80	1.95	4.72	1.80	3.13	1.76	1.05	2.56	.61

QES Q2 2014

Q6 Approximately how much money, if any, do you estimate the two tube strikes combined cost your business?

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Nothing	(0.0)	262	128	77	121	117	184	65	134	89
		52%	47%	52%	42%	63%	48%	66%	48%	59%
£1,000 or less	(0.5)	91	53	30	64	26	74	15	54	25
		18%	19%	20%	22%	14%	19%	15%	19%	17%
£1,001 - £5,000	(3.0)	44	27	10	31	11	38	3	30	10
		9%	10%	6%	11%	6%	10%	3%	11%	6%
£5,001 - £10,000	(7.5)	24	14	9	15	9	19	5	16	9
		5%	5%	6%	5%	5%	5%	5%	6%	6%
£10,001 - £20,000	(15.0)	7	5	2	6	1	7	-	6	-
		1%	2%	1%	2%	*	2%	-	2%	-
£20,001 - £50,000	(35.0)	2	1	1	2	*	2	*	1	1
		*	*	*	1%	*	1%	*	*	1%
£50,001 - £100,000	(75.0)	2	2	-	1	1	*	2	1	2
		*	1%	-	*	1%	*	2%	*	1%
More than £100,000	(125.0)	2	*	1	1	1	2	-	1	1
		*	*	1%	*	*	1%	-	*	1%
Don't know		67	38	18	48	16	54	8	34	15
		13%	14%	12%	16%	9%	14%	8%	12%	10%
Prefer not to say		-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-
Not Stated		4	3	2	1	4	3	-	3	*
		1%	1%	1%	*	2%	1%	-	1%	*
Net: Any money		173	103	52	120	48	143	25	107	47
		34%	38%	35%	41%	26%	37%	26%	39%	31%
Mean Score		2.22	2.44	2.15	2.49	1.70	2.23	2.47	2.18	2.95

QES Q2 2014

Q6 Approximately how much money, if any, do you estimate the two tube strikes combined cost your business?

Base: All respondents

		Manufacturing					Services					
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Nothing	(0.0)	262	45	1	-	-	46	210	5	-	*	216
		52%	52%	27%	-	-	51%	53%	28%	-	20%	52%
£1,000 or less	(0.5)	91	10	-	-	-	10	79	2	-	-	81
		18%	12%	-	-	-	12%	20%	9%	-	-	19%
£1,001 - £5,000	(3.0)	44	11	*	-	-	11	31	2	-	-	33
		9%	12%	11%	-	-	12%	8%	8%	-	-	8%
£5,001 - £10,000	(7.5)	24	5	-	-	*	5	17	2	-	*	19
		5%	5%	-	-	100%	6%	4%	10%	-	20%	5%
£10,001 - £20,000	(15.0)	7	-	1	-	-	1	5	1	-	-	6
		1%	-	27%	-	-	1%	1%	4%	-	-	1%
£20,001 - £50,000	(35.0)	2	1	-	-	-	1	1	1	-	-	1
		*	1%	-	-	-	1%	*	4%	-	-	*
£50,001 - £100,000	(75.0)	2	-	-	-	-	-	1	*	1	*	2
		*	-	-	-	-	-	*	1%	100%	20%	1%
More than £100,000	(125.0)	2	-	-	-	-	-	1	1	-	-	2
		*	-	-	-	-	-	*	4%	-	-	*
Don't know		67	13	1	-	-	14	47	6	-	1	53
		13%	15%	35%	-	-	16%	12%	29%	-	40%	13%
Prefer not to say		-	-	-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-	-	-
Not Stated		4	2	-	-	-	2	2	*	-	-	2
		1%	3%	-	-	-	3%	*	2%	-	-	1%
Net: Any money		173	27	1	-	*	28	135	8	1	1	144
		34%	31%	38%	-	100%	31%	34%	40%	100%	40%	35%
Mean Score		2.22	1.58	6.73	-	7.50	1.73	1.68	13.67	75.00	27.50	2.32

QES Q2 2014

Q7 Do you agree or disagree with the Mayor of London's proposal to raise the threshold for a legal strike to 50 per cent of the balloted union workforce, rather than just 50 per cent of those who vote?

Base: All respondents

	Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
253	230	22	42	211	138	114	42	200	11	40	213	83	170	48	196	9
50%	51%	42%	46%	51%	49%	51%	53%	50%	37%	49%	50%	47%	52%	49%	50%	54%
131	113	17	28	102	71	60	22	99	10	21	110	51	80	27	100	4
26%	25%	32%	31%	25%	25%	27%	28%	25%	32%	26%	26%	29%	24%	28%	26%	22%
50	45	5	6	44	27	23	5	41	4	5	45	21	29	10	38	2
10%	10%	9%	6%	11%	10%	10%	6%	10%	13%	7%	11%	12%	9%	10%	10%	15%
48	43	5	4	44	31	17	6	38	4	8	40	9	39	9	38	1
10%	9%	10%	4%	11%	11%	8%	8%	10%	13%	10%	9%	5%	12%	9%	10%	9%
24	20	4	11	13	15	9	5	18	2	6	18	13	12	4	20	-
5%	4%	7%	12%	3%	5%	4%	6%	5%	5%	8%	4%	7%	4%	4%	5%	-
383	344	40	70	313	209	174	63	299	21	60	323	133	250	75	297	12
76%	76%	74%	77%	75%	74%	78%	80%	75%	69%	75%	76%	75%	76%	77%	76%	76%
98	88	10	10	89	57	41	11	79	8	14	85	31	68	19	76	4
19%	20%	19%	11%	21%	20%	18%	14%	20%	26%	17%	20%	17%	21%	19%	19%	24%

QES Q2 2014

Q7 Do you agree or disagree with the Mayor of London's proposal to raise the threshold for a legal strike to 50 per cent of the balloted union workforce, rather than just 50 per cent of those who vote?

Base: All respondents

	Total	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	253	140	78	192	52	253	-	142	66
	50%	51%	52%	66%	28%	66%	-	51%	44%
Tend to agree	131	76	34	66	54	131	-	77	41
	26%	28%	23%	23%	29%	34%	-	28%	27%
Tend to disagree	50	25	15	15	30	-	50	21	23
	10%	9%	10%	5%	16%	-	51%	7%	15%
Strongly disagree	48	27	16	9	37	-	48	27	17
	10%	10%	10%	3%	20%	-	49%	10%	12%
Don't know	24	5	8	8	12	-	-	11	3
	5%	2%	5%	3%	6%	-	-	4%	2%
Nets									
Agree	383	216	112	258	106	383	-	219	108
	76%	79%	75%	89%	57%	100%	-	79%	71%
Disagree	98	51	30	24	67	-	98	48	40
	19%	19%	20%	8%	36%	-	100%	17%	27%

QES Q2 2014

Q7 Do you agree or disagree with the Mayor of London's proposal to raise the threshold for a legal strike to 50 per cent of the balloted union workforce, rather than just 50 per cent of those who vote?

Base: All respondents

	Manufacturing					Services				
Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
506	79	8	-	1	88	354	57	2	5	418
506	88	3	-	*	91	394	19	1	2	415
100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
253	41	1	-	-	42	200	10	-	1	211
50%	47%	35%	-	-	46%	51%	52%	-	40%	51%
131	27	1	-	*	28	97	4	-	1	102
26%	31%	27%	-	100%	31%	25%	23%	-	40%	25%
50	5	*	-	-	6	42	2	1	-	44
10%	6%	13%	-	-	6%	11%	9%	100%	-	11%
48	4	*	-	-	4	42	2	-	*	44
10%	4%	13%	-	-	4%	11%	12%	-	20%	11%
24	11	*	-	-	11	12	1	-	-	13
5%	12%	11%	-	-	12%	3%	5%	-	-	3%
383	68	2	-	*	70	297	14	-	1	313
76%	78%	62%	-	100%	77%	76%	74%	-	80%	75%
98	9	1	-	-	10	84	4	1	*	89
19%	10%	27%	-	-	11%	21%	21%	100%	20%	21%

QES Q2 2014

Q8 Thinking of your needs as a business, do you support or oppose the current plans for High Speed Two (HS2) between London, Birmingham, Manchester and Leeds?

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total	506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly support	108	97	12	23	86	62	46	25	76	7	24	84	42	66	18	87	4
	21%	21%	22%	25%	21%	22%	21%	32%	19%	25%	30%	20%	24%	20%	18%	22%	25%
Tend to support	170	149	21	37	133	87	83	28	135	7	25	145	60	110	34	130	6
	34%	33%	38%	40%	32%	31%	37%	36%	34%	23%	31%	34%	34%	33%	34%	33%	38%
Tend to oppose	72	62	10	9	63	43	29	6	63	3	10	62	25	47	22	48	2
	14%	14%	19%	9%	15%	15%	13%	7%	16%	10%	13%	15%	14%	14%	22%	12%	15%
Strongly oppose	79	73	6	10	69	52	27	7	63	9	5	74	26	53	9	69	1
	16%	16%	12%	11%	17%	19%	12%	9%	16%	31%	7%	17%	15%	16%	10%	17%	7%
Don't know	77	72	5	13	64	38	39	12	61	4	16	61	24	53	15	59	2
	15%	16%	9%	14%	15%	13%	17%	16%	15%	12%	20%	14%	13%	16%	16%	15%	15%
Nets																	
Support	278	246	32	59	219	149	130	53	210	14	49	230	102	176	51	217	10
	55%	54%	60%	65%	53%	53%	58%	68%	53%	48%	61%	54%	58%	53%	52%	55%	63%
Oppose	151	135	16	19	132	95	56	13	126	12	15	136	51	101	31	116	4
	30%	30%	30%	21%	32%	34%	25%	16%	32%	40%	19%	32%	29%	31%	32%	30%	22%

QES Q2 2014

Q8 Thinking of your needs as a business, do you support or oppose the current plans for High Speed Two (HS2) between London, Birmingham, Manchester and Leeds?

Base: All respondents

	Total	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total	506	280	147	292	180	381	99	283	150
Weighted Total	506	272	150	290	185	383	98	278	151
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly support	108	61	36	69	35	79	24	108	-
	21%	22%	24%	24%	19%	20%	24%	39%	-
Tend to support	170	95	45	102	60	141	24	170	-
	34%	35%	30%	35%	32%	37%	24%	61%	-
Tend to oppose	72	39	23	39	29	47	22	-	72
	14%	14%	15%	14%	15%	12%	23%	-	48%
Strongly oppose	79	39	25	36	42	61	18	-	79
	16%	14%	17%	12%	23%	16%	19%	-	52%
Don't know	77	38	21	43	19	57	10	-	-
	15%	14%	14%	15%	10%	15%	10%	-	-
Nets									
Support	278	156	82	172	95	219	48	278	-
	55%	57%	54%	59%	51%	57%	49%	100%	-
Oppose	151	79	48	75	71	108	40	-	151
	30%	29%	32%	26%	38%	28%	41%	-	100%

QES Q2 2014

Q8 Thinking of your needs as a business, do you support or oppose the current plans for High Speed Two (HS2) between London, Birmingham, Manchester and Leeds?

Base: All respondents

	Manufacturing					Services				
Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
506	79	8	-	1	88	354	57	2	5	418
506	88	3	-	*	91	394	19	1	2	415
100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
108	23	-	-	-	23	81	5	*	*	86
21%	26%	-	-	-	25%	20%	25%	39%	20%	21%
170	35	1	-	-	37	124	8	-	*	133
34%	40%	38%	-	-	40%	32%	44%	-	20%	32%
72	8	*	-	-	9	61	2	*	-	63
14%	9%	13%	-	-	9%	15%	12%	61%	-	15%
79	10	*	-	*	10	66	2	-	*	69
16%	11%	13%	-	100%	11%	17%	13%	-	20%	17%
77	12	1	-	-	13	62	1	-	1	64
15%	14%	35%	-	-	14%	16%	6%	-	40%	15%
278	58	1	-	-	59	205	13	*	1	219
55%	66%	38%	-	-	65%	52%	69%	39%	40%	53%
151	18	1	-	*	19	127	5	*	*	132
30%	20%	27%	-	100%	21%	32%	25%	61%	20%	32%

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

Summary table

Base: All respondents

	Total	More likely to support	No difference	Less likely to support	Don't know	Mean score
A direct link to Heathrow Airport	506 100%	333 66%	149 29%	17 3%	8 1%	.63
A direct link between High Speed One (the Channel Tunnel Rail Link or Eurostar) and High Speed Two	506 100%	282 56%	190 38%	19 4%	16 3%	.54
A fully redeveloped Euston Station	506 100%	187 37%	284 56%	20 4%	16 3%	.34

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A direct link to Heathrow Airport

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	333	297	36	54	279	193	140	55	258	20	60	273	121	212	68	253	11
		66%	66%	67%	59%	67%	69%	62%	70%	65%	65%	75%	64%	68%	64%	70%	65%	69%
No difference	(0.0)	149	134	15	32	117	72	77	21	118	10	17	132	49	100	27	119	4
		29%	30%	29%	36%	28%	26%	34%	27%	30%	34%	22%	31%	28%	30%	27%	30%	22%
Less likely to support	(-1.0)	17	14	2	2	14	12	5	3	13	*	1	16	4	12	2	13	1
		3%	3%	4%	3%	3%	4%	2%	4%	3%	1%	1%	4%	3%	4%	2%	3%	9%
Don't know		8	7	*	2	5	5	2	-	8	-	2	6	3	5	-	8	-
		1%	2%	1%	3%	1%	2%	1%	-	2%	-	2%	1%	2%	1%	-	2%	-
Mean Score		.63	.64	.63	.58	.65	.66	.61	.66	.63	.64	.76	.61	.67	.62	.68	.63	.60

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A direct link to Heathrow Airport

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	333	204	91	207	115	262	57	208	81
		66%	75%	60%	71%	62%	68%	58%	75%	54%
No difference	(0.0)	149	62	50	74	60	108	34	65	59
		29%	23%	33%	25%	32%	28%	34%	23%	39%
Less likely to support	(-1.0)	17	6	7	8	8	10	5	4	11
		3%	2%	5%	3%	4%	3%	5%	2%	7%
Don't know		8	1	2	1	3	4	2	*	-
		1%	*	2%	*	1%	1%	2%	*	-
Mean Score		.63	.73	.57	.69	.59	.66	.54	.73	.47

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A direct link to Heathrow Airport

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	333	52	2	-	-	54	264	15	*	*	279
		66%	59%	76%	-	-	59%	67%	77%	39%	20%	67%
No difference	(0.0)	149	31	1	-	*	32	111	4	-	1	117
		29%	36%	24%	-	100%	36%	28%	19%	-	80%	28%
Less likely to support	(-1.0)	17	2	-	-	-	2	14	*	*	-	14
		3%	3%	-	-	-	3%	3%	1%	61%	-	3%
Don't know		8	2	-	-	-	2	5	*	-	-	5
		1%	3%	-	-	-	3%	1%	2%	-	-	1%
Mean Score		.63	.58	.76	-	-	.58	.64	.78	-.21	.20	.65

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A fully redeveloped Euston Station

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	187	168	18	22	165	110	76	32	140	15	36	151	65	121	33	146	8
		37%	37%	34%	24%	40%	39%	34%	40%	35%	49%	45%	35%	37%	37%	34%	37%	47%
No difference	(0.0)	284	252	32	62	222	151	132	44	226	14	40	244	98	186	58	219	7
		56%	56%	59%	68%	53%	54%	59%	56%	57%	46%	50%	57%	55%	56%	59%	56%	44%
Less likely to support	(-1.0)	20	18	2	2	17	11	8	2	18	*	2	17	5	14	4	15	*
		4%	4%	4%	3%	4%	4%	4%	2%	4%	1%	3%	4%	3%	4%	4%	4%	1%
Don't know		16	14	2	5	11	8	7	2	13	1	2	14	8	8	2	12	1
		3%	3%	3%	5%	3%	3%	3%	2%	3%	4%	3%	3%	5%	2%	2%	3%	7%
Mean Score		.34	.34	.32	.23	.36	.36	.31	.39	.32	.50	.43	.32	.36	.33	.31	.34	.49

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A fully redeveloped Euston Station

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	187	104	55	110	65	141	36	129	37
		37%	38%	37%	38%	35%	37%	37%	46%	25%
No difference	(0.0)	284	151	82	165	102	220	50	138	99
		56%	55%	55%	57%	55%	57%	51%	50%	65%
Less likely to support	(-1.0)	20	10	8	7	13	13	7	6	14
		4%	4%	5%	2%	7%	3%	7%	2%	9%
Don't know		16	7	4	8	4	10	5	5	1
		3%	3%	3%	3%	2%	2%	5%	2%	1%
Mean Score		.34	.35	.32	.37	.29	.34	.32	.45	.16

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A fully redeveloped Euston Station

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	187	20	1	-	*	22	157	7	*	1	165
		37%	23%	51%	-	100%	24%	40%	37%	39%	40%	40%
No difference	(0.0)	284	60	1	-	-	62	210	10	*	1	222
		56%	69%	49%	-	-	68%	53%	54%	61%	60%	53%
Less likely to support	(-1.0)	20	2	-	-	-	2	17	1	-	-	17
		4%	3%	-	-	-	3%	4%	4%	-	-	4%
Don't know		16	5	-	-	-	5	10	1	-	-	11
		3%	5%	-	-	-	5%	3%	5%	-	-	3%
Mean Score		.34	.21	.51	-	1.00	.23	.37	.34	.39	.40	.36

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A direct link between High Speed One (the Channel Tunnel Rail Link or Eurostar) and High Speed Two

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	282	255	26	52	230	158	124	52	212	17	47	235	95	186	60	210	11
		56%	56%	49%	57%	55%	56%	55%	66%	53%	58%	59%	55%	54%	57%	62%	54%	69%
No difference	(0.0)	190	166	24	33	157	102	88	23	159	8	28	162	72	118	33	152	5
		38%	37%	45%	36%	38%	36%	39%	29%	40%	26%	35%	38%	41%	36%	34%	39%	30%
Less likely to support	(-1.0)	19	17	2	2	17	11	8	3	12	4	3	16	5	14	2	17	*
		4%	4%	4%	3%	4%	4%	3%	4%	3%	13%	4%	4%	3%	4%	2%	4%	1%
Don't know		16	14	1	4	12	11	5	*	14	1	2	14	4	12	3	13	-
		3%	3%	2%	4%	3%	4%	2%	*	4%	4%	2%	3%	2%	4%	3%	3%	-
Mean Score		.54	.54	.46	.57	.53	.54	.53	.63	.52	.47	.56	.53	.52	.54	.61	.51	.68

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A direct link between High Speed One (the Channel Tunnel Rail Link or Eurostar) and High Speed Two

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	282	151	90	174	93	219	49	188	63
		56%	55%	60%	60%	50%	57%	50%	68%	42%
No difference	(0.0)	190	106	48	101	76	141	41	81	76
		38%	39%	32%	35%	41%	37%	42%	29%	50%
Less likely to support	(-1.0)	19	11	7	9	10	13	5	6	12
		4%	4%	5%	3%	5%	3%	5%	2%	8%
Don't know		16	5	5	6	6	10	3	3	*
		3%	2%	3%	2%	3%	3%	3%	1%	*
Mean Score		.54	.52	.57	.58	.46	.55	.46	.66	.34

QES Q2 2014

Q9 For each of the following, please indicate whether you would be more or less likely to support the plans for High Speed Two (HS2) if they included that option, or if including that option would make no difference to you.

A direct link between High Speed One (the Channel Tunnel Rail Link or Eurostar) and High Speed Two

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
More likely to support	(1.0)	282	50	2	-	-	52	219	10	1	*	230
		56%	57%	62%	-	-	57%	56%	52%	100%	20%	55%
No difference	(0.0)	190	32	1	-	*	33	148	8	-	1	157
		38%	36%	38%	-	100%	36%	38%	40%	-	60%	38%
Less likely to support	(-1.0)	19	2	-	-	-	2	16	*	-	*	17
		4%	3%	-	-	-	3%	4%	1%	-	20%	4%
Don't know		16	4	-	-	-	4	11	1	-	-	12
		3%	4%	-	-	-	4%	3%	6%	-	-	3%
Mean Score		.54	.57	.62	-	-	.57	.53	.54	1.00	-	.53

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

Summary table

Base: All respondents

								Nets		
	Total	Very important	Fairly important	Not very important	Not at all important	Don't know	London's current infrastructure can cope with the projected population increase	Important	Not important	
Crossrail Two (a new London underground line linking north and south west London)	506 100%	221 44%	196 39%	53 11%	15 3%	20 4%	1 *	417 82%	68 13%	1.15
Upgrades to the Piccadilly and Bakerloo lines to improve capacity	506 100%	215 42%	195 39%	61 12%	16 3%	18 4%	1 *	410 81%	77 15%	1.09
At least two more river crossings (road bridges or tunnels) east of Tower Bridge	506 100%	141 28%	172 34%	118 23%	37 7%	38 7%	1 *	312 62%	155 31%	.56

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

At least two more river crossings (road bridges or tunnels) east of Tower Bridge

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	141	127	14	27	114	78	62	28	100	13	31	110	53	87	30	102	8
		28%	28%	26%	29%	27%	28%	28%	36%	25%	42%	39%	26%	30%	26%	31%	26%	52%
Fairly important	(1.0)	172	150	21	34	137	97	75	32	135	5	28	143	64	108	36	132	4
		34%	33%	39%	38%	33%	34%	33%	40%	34%	15%	35%	34%	36%	33%	36%	34%	26%
Not very important	(-1.0)	118	104	14	22	96	62	56	13	99	6	12	106	38	80	20	96	2
		23%	23%	26%	24%	23%	22%	25%	17%	25%	19%	15%	25%	21%	24%	20%	24%	15%
Not at all important	(-2.0)	37	35	2	2	35	22	15	1	32	4	3	34	8	29	5	32	-
		7%	8%	4%	3%	8%	8%	7%	2%	8%	12%	4%	8%	4%	9%	5%	8%	-
Don't know		38	36	2	6	32	22	16	4	30	4	6	32	13	25	7	29	1
		7%	8%	4%	7%	8%	8%	7%	5%	8%	12%	7%	8%	7%	8%	7%	8%	7%
London's current infrastructure can cope with the projected population increase		1	1	-	-	1	1	-	-	1	-	-	1	1	-	-	1	-
		*	*	-	-	*	*	-	-	*	-	-	*	1%	-	-	*	-
Nets																		
Important		312	277	35	61	251	175	137	60	235	17	59	253	117	195	66	234	13
		62%	61%	66%	67%	61%	62%	61%	76%	59%	58%	74%	59%	66%	59%	68%	60%	78%
Not important		155	138	16	24	131	84	71	15	131	9	15	140	45	110	24	128	2
		31%	31%	31%	26%	32%	30%	32%	19%	33%	31%	19%	33%	26%	33%	25%	33%	15%
Mean Score		.56	.55	.60	.72	.52	.57	.54	.96	.47	.65	.97	.48	.73	.47	.75	.48	1.24

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

At least two more river crossings (road bridges or tunnels) east of Tower Bridge

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	141	64	58	72	64	105	27	85	43
		28%	23%	39%	25%	34%	27%	27%	31%	28%
Fairly important	(1.0)	172	102	46	103	62	130	35	94	50
		34%	37%	31%	35%	33%	34%	36%	34%	33%
Not very important	(-1.0)	118	68	31	74	36	92	23	73	33
		23%	25%	21%	25%	19%	24%	23%	26%	22%
Not at all important	(-2.0)	37	22	8	23	11	29	8	13	16
		7%	8%	6%	8%	6%	8%	8%	5%	11%
Don't know		38	16	7	18	11	26	6	13	9
		7%	6%	4%	6%	6%	7%	6%	5%	6%
London's current infrastructure can cope with the projected population increase		1	1	-	-	1	1	-	-	-
		*	*	-	-	1%	*	-	-	-
Nets										
Important		312	165	104	175	125	235	62	179	93
		62%	61%	69%	60%	68%	61%	63%	64%	62%
Not important		155	90	40	97	47	121	30	86	48
		31%	33%	27%	33%	25%	32%	31%	31%	32%
Mean Score		.56	.46	.79	.47	.76	.53	.56	.62	.51

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

At least two more river crossings (road bridges or tunnels) east of Tower Bridge

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	141	25	1	-	-	27	109	5	-	1	114
		28%	29%	38%	-	-	29%	28%	25%	-	40%	27%
Fairly important	(1.0)	172	33	1	-	*	34	129	7	*	1	137
		34%	37%	49%	-	100%	38%	33%	38%	39%	40%	33%
Not very important	(-1.0)	118	21	*	-	-	22	91	5	-	*	96
		23%	24%	13%	-	-	24%	23%	28%	-	20%	23%
Not at all important	(-2.0)	37	2	-	-	-	2	33	1	*	-	35
		7%	3%	-	-	-	3%	8%	7%	61%	-	8%
Don't know		38	6	-	-	-	6	31	*	-	-	32
		7%	7%	-	-	-	7%	8%	2%	-	-	8%
London's current infrastructure can cope with the projected population increase		1	-	-	-	-	-	1	-	-	-	1
		*	-	-	-	-	-	*	-	-	-	*
Nets												
Important		312	58	2	-	*	61	237	12	*	1	251
		62%	66%	87%	-	100%	67%	60%	63%	39%	80%	61%
Not important		155	24	*	-	-	24	123	7	*	*	131
		31%	27%	13%	-	-	26%	31%	35%	61%	20%	32%
Mean Score		.56	.70	1.11	-	1.00	.72	.53	.47	-.82	1.00	.52

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

Crossrail Two (a new London underground line linking north and south west London)

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	221	197	24	45	177	130	91	44	160	18	39	182	82	139	52	162	8
		44%	44%	45%	49%	43%	46%	41%	55%	40%	59%	49%	43%	47%	42%	53%	41%	47%
Fairly important	(1.0)	196	174	22	34	162	110	86	28	158	10	32	164	65	131	31	156	9
		39%	39%	41%	38%	39%	39%	38%	36%	40%	33%	41%	38%	37%	40%	32%	40%	53%
Not very important	(-1.0)	53	49	4	7	46	25	28	3	49	1	3	50	21	32	7	46	-
		11%	11%	8%	7%	11%	9%	12%	4%	12%	4%	4%	12%	12%	10%	7%	12%	-
Not at all important	(-2.0)	15	13	2	2	13	8	6	1	13	-	2	13	2	13	2	13	-
		3%	3%	3%	2%	3%	3%	3%	2%	3%	-	2%	3%	1%	4%	2%	3%	-
Don't know		20	18	2	4	16	7	13	2	16	1	4	16	6	14	6	14	-
		4%	4%	3%	4%	4%	2%	6%	3%	4%	4%	5%	4%	3%	4%	6%	4%	-
London's current infrastructure can cope with the projected population increase		1	1	-	-	1	1	-	-	1	-	-	1	1	-	-	1	-
		*	*	-	-	*	*	-	-	*	-	-	*	1%	-	-	*	-
Nets																		
Important		417	371	46	79	338	240	177	72	317	28	71	346	147	270	83	318	16
		82%	82%	86%	87%	82%	85%	79%	91%	80%	92%	89%	81%	83%	82%	85%	81%	100%
Not important		68	62	6	8	59	34	34	5	62	1	5	63	23	45	8	59	-
		13%	14%	11%	9%	14%	12%	15%	6%	16%	4%	6%	15%	13%	14%	9%	15%	-
Mean Score		1.15	1.14	1.22	1.30	1.11	1.20	1.08	1.43	1.06	1.53	1.37	1.10	1.21	1.11	1.37	1.08	1.47

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

Crossrail Two (a new London underground line linking north and south west London)

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	221	123	69	131	83	176	35	136	64
		44%	45%	46%	45%	45%	46%	36%	49%	42%
Fairly important	(1.0)	196	112	52	119	66	146	42	120	52
		39%	41%	35%	41%	36%	38%	43%	43%	34%
Not very important	(-1.0)	53	22	21	27	22	38	12	16	25
		11%	8%	14%	9%	12%	10%	13%	6%	17%
Not at all important	(-2.0)	15	7	5	8	6	11	4	1	8
		3%	2%	3%	3%	3%	3%	4%	*	5%
Don't know		20	8	4	6	7	11	5	5	3
		4%	3%	3%	2%	4%	3%	5%	2%	2%
London's current infrastructure can cope with the projected population increase		1	1	-	-	1	1	-	-	-
		*	*	-	-	1%	*	-	-	-
Nets										
Important		417	235	120	249	150	322	77	256	116
		82%	86%	80%	86%	81%	84%	79%	92%	77%
Not important		68	28	25	35	28	49	16	17	33
		13%	10%	17%	12%	15%	13%	16%	6%	22%
Mean Score		1.15	1.23	1.09	1.19	1.13	1.18	1.00	1.37	.94

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

Crossrail Two (a new London underground line linking north and south west London)

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	221	43	1	-	*	45	167	8	*	1	177
		44%	49%	38%	-	100%	49%	42%	43%	39%	60%	43%
Fairly important	(1.0)	196	33	1	-	-	34	153	8	-	1	162
		39%	38%	38%	-	-	38%	39%	40%	-	40%	39%
Not very important	(-1.0)	53	7	*	-	-	7	44	2	*	-	46
		11%	7%	11%	-	-	7%	11%	10%	61%	-	11%
Not at all important	(-2.0)	15	1	*	-	-	2	12	1	-	-	13
		3%	1%	13%	-	-	2%	3%	3%	-	-	3%
Don't know		20	4	-	-	-	4	15	1	-	-	16
		4%	4%	-	-	-	4%	4%	4%	-	-	4%
London's current infrastructure can cope with the projected population increase		1	-	-	-	-	-	1	-	-	-	1
		*	-	-	-	-	-	*	-	-	-	*
Nets												
Important		417	76	2	-	*	79	320	16	*	2	338
		82%	87%	76%	-	100%	87%	81%	83%	39%	100%	82%
Not important		68	8	1	-	-	8	57	3	*	-	59
		13%	9%	24%	-	-	9%	14%	13%	61%	-	14%
Mean Score		1.15	1.32	.76	-	2.00	1.30	1.11	1.13	.18	1.60	1.11

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

Upgrades to the Piccadilly and Bakerloo lines to improve capacity

Base: All respondents

		Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Total	1-9	10+	Manufacturing	Services	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
Weighted Total		506	452	54	91	415	282	224	79	397	30	80	426	177	329	98	392	16
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	215	191	24	35	180	121	94	43	155	16	42	173	79	136	36	173	6
		42%	42%	45%	38%	43%	43%	42%	55%	39%	54%	53%	41%	45%	41%	37%	44%	39%
Fairly important	(1.0)	195	174	21	40	155	114	81	25	159	11	22	173	68	127	45	140	10
		39%	39%	39%	44%	37%	40%	36%	31%	40%	38%	27%	41%	39%	38%	46%	36%	61%
Not very important	(-1.0)	61	55	6	10	51	32	28	10	49	1	11	50	17	43	11	49	-
		12%	12%	11%	11%	12%	11%	13%	13%	12%	4%	14%	12%	10%	13%	12%	13%	-
Not at all important	(-2.0)	16	14	2	2	14	10	7	*	16	-	3	13	6	10	2	15	-
		3%	3%	4%	3%	3%	3%	3%	*	4%	-	4%	3%	4%	3%	2%	4%	-
Don't know		18	17	1	4	14	4	14	1	16	1	2	16	4	13	4	14	-
		4%	4%	2%	4%	3%	1%	6%	1%	4%	4%	3%	4%	3%	4%	4%	4%	-
London's current infrastructure can cope with the projected population increase		1	1	-	-	1	1	-	-	1	-	-	1	1	-	-	1	-
		*	*	-	-	*	*	-	-	*	-	-	*	1%	-	-	*	-
Nets																		
Important		410	365	45	75	335	235	175	68	314	28	64	346	147	263	81	313	16
		81%	81%	83%	82%	81%	83%	78%	86%	79%	92%	80%	81%	83%	80%	83%	80%	100%
Not important		77	69	8	12	65	42	35	10	66	1	14	63	24	53	13	64	-
		15%	15%	14%	14%	16%	15%	16%	13%	17%	4%	17%	15%	13%	16%	13%	16%	-
Mean Score		1.09	1.09	1.13	1.09	1.09	1.10	1.08	1.29	1.02	1.48	1.15	1.08	1.15	1.06	1.09	1.08	1.39

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

Upgrades to the Piccadilly and Bakerloo lines to improve capacity

Base: All respondents

			Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two	
		Total	Heathrow	Gatwick	Support	Oppose	Agree	Disagree	Support	Oppose
Unweighted Total		506	280	147	292	180	381	99	283	150
Weighted Total		506	272	150	290	185	383	98	278	151
		100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	215	121	67	122	86	162	44	133	61
		42%	44%	45%	42%	46%	42%	45%	48%	40%
Fairly important	(1.0)	195	118	48	120	64	155	33	107	61
		39%	43%	32%	41%	35%	40%	34%	38%	40%
Not very important	(-1.0)	61	22	23	34	22	44	12	33	18
		12%	8%	16%	12%	12%	12%	13%	12%	12%
Not at all important	(-2.0)	16	7	4	10	5	12	4	1	8
		3%	2%	3%	3%	3%	3%	4%	*	5%
Don't know		18	3	7	4	7	9	5	5	2
		4%	1%	4%	1%	4%	2%	5%	2%	2%
London's current infrastructure can cope with the projected population increase		1	1	-	-	1	1	-	-	-
		*	*	-	-	1%	*	-	-	-
Nets										
Important		410	239	116	242	150	317	77	239	122
		81%	88%	77%	83%	81%	83%	79%	86%	81%
Not important		77	29	28	44	27	57	16	34	26
		15%	11%	18%	15%	15%	15%	17%	12%	18%
Mean Score		1.09	1.21	1.06	1.08	1.15	1.09	1.08	1.23	1.00

QES Q2 2014

Q10 London's population is due to grow by 1.5 million people by 2030. Thinking of your needs as a business, how important, or otherwise, do you believe each of the following infrastructure projects are to coping with this projected population increase?

Upgrades to the Piccadilly and Bakerloo lines to improve capacity

Base: All respondents

		Manufacturing						Services				
		Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total		506	79	8	-	1	88	354	57	2	5	418
Weighted Total		506	88	3	-	*	91	394	19	1	2	415
		100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Very important	(2.0)	215	34	1	-	-	35	171	8	*	*	180
		42%	38%	38%	-	-	38%	43%	44%	39%	20%	43%
Fairly important	(1.0)	195	38	1	-	*	40	148	6	-	1	155
		39%	44%	38%	-	100%	44%	37%	34%	-	60%	37%
Not very important	(-1.0)	61	10	*	-	-	10	47	3	-	*	51
		12%	11%	13%	-	-	11%	12%	17%	-	20%	12%
Not at all important	(-2.0)	16	2	-	-	-	2	13	1	*	-	14
		3%	3%	-	-	-	3%	3%	3%	61%	-	3%
Don't know		18	4	*	-	-	4	14	*	-	-	14
		4%	4%	11%	-	-	4%	3%	2%	-	-	3%
London's current infrastructure can cope with the projected population increase		1	-	-	-	-	-	1	-	-	-	1
		*	-	-	-	-	-	*	-	-	-	*
Nets												
Important		410	72	2	-	*	75	319	15	*	1	335
		81%	82%	76%	-	100%	82%	81%	78%	39%	80%	81%
Not important		77	12	*	-	-	12	60	4	*	*	65
		15%	14%	13%	-	-	14%	15%	20%	61%	20%	16%
Mean Score		1.09	1.09	1.12	-	1.00	1.09	1.10	1.00	-.43	.80	1.09