



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

QES Q2 2014

D1 How many people does your company employ?

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%
1-9	452	452	-	82	370	248	204	58	369	25	49	403	152	301	84	353	16
	89%	100%	-	91%	89%	88%	91%	74%	93%	83%	61%	95%	86%	91%	86%	90%	96%
10-19	29	-	29	5	24	15	13	11	15	3	14	14	13	15	8	21	-
	6%	-	54%	6%	6%	5%	6%	14%	4%	9%	18%	3%	8%	5%	8%	5%	-
20-49	14	-	14	2	12	10	4	6	8	*	10	5	8	6	4	10	*
	3%	-	26%	2%	3%	4%	2%	7%	2%	1%	12%	1%	5%	2%	4%	3%	2%
50-99	5	-	5	1	4	4	1	2	2	1	4	1	2	3	1	4	-
	1%	-	9%	1%	1%	1%	1%	2%	1%	3%	5%	*	1%	1%	1%	1%	-
100-199	3	-	3	-	3	2	1	1	1	1	2	1	1	2	*	2	*
	1%	-	5%	-	1%	1%	*	1%	*	2%	2%	*	*	1%	*	1%	1%
200-249	*	-	*	-	*	*	-	*	-	-	*	-	*	-	-	*	-
	*	-	*	-	*	*	-	*	-	-	*	-	*	-	-	*	-
250-499	*	-	*	-	*	*	-	-	*	-	-	*	*	-	-	*	-
	*	-	1%	-	*	*	-	-	*	-	-	*	*	-	-	*	-
500+	2	-	2	*	2	1	1	*	1	*	1	1	1	1	1	1	-
	*	-	4%	*	*	1%	*	*	*	1%	1%	*	*	*	1%	*	-
Net: 10+	54	-	54	9	45	33	20	20	28	5	31	23	25	29	14	39	1
	11%	-	100%	9%	11%	12%	9%	26%	7%	17%	39%	5%	14%	9%	14%	10%	4%
BCC nets																	
1-19	481	452	29	88	394	264	217	70	384	28	63	418	165	316	92	374	16
	95%	100%	54%	96%	95%	94%	97%	88%	97%	92%	79%	98%	93%	96%	94%	95%	96%
20-199	22	-	22	3	19	16	6	9	11	2	15	7	10	12	5	16	1
	4%	-	41%	3%	5%	6%	3%	11%	3%	7%	19%	2%	6%	4%	5%	4%	4%
200-499	1	-	1	-	1	1	-	*	*	-	*	*	1	-	-	1	-
	*	-	1%	-	*	*	-	*	*	-	*	*	*	-	-	*	-
500+	2	-	2	*	2	1	1	*	1	*	1	1	1	1	1	1	-
	*	-	4%	*	*	1%	*	*	*	1%	1%	*	*	*	1%	*	-

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Unweighted Total	506	379	127	88	418	290	216	97	375	34	117	389	185	321	102	389	15
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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
ONS nets																	
0-9	452	452	-	82	370	248	204	58	369	25	49	403	152	301	84	353	16
	89%	100%	-	91%	89%	88%	91%	74%	93%	83%	61%	95%	86%	91%	86%	90%	96%
10-19	29	-	29	5	24	15	13	11	15	3	14	14	13	15	8	21	-
	6%	-	54%	6%	6%	5%	6%	14%	4%	9%	18%	3%	8%	5%	8%	5%	-
20-49	14	-	14	2	12	10	4	6	8	*	10	5	8	6	4	10	*
	3%	-	26%	2%	3%	4%	2%	7%	2%	1%	12%	1%	5%	2%	4%	3%	2%
50-99	5	-	5	1	4	4	1	2	2	1	4	1	2	3	1	4	-
	1%	-	9%	1%	1%	1%	1%	2%	1%	3%	5%	*	1%	1%	1%	1%	-
100-249	3	-	3	-	3	2	1	1	1	1	2	1	1	2	*	2	*
	1%	-	6%	-	1%	1%	*	1%	*	2%	3%	*	1%	1%	*	1%	1%
250+	3	-	3	*	2	2	1	*	2	*	1	1	1	1	1	2	-
	1%	-	5%	*	1%	1%	*	*	*	1%	1%	*	1%	*	1%	*	-

QES Q2 2014

D1 How many people does your company employ?

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%
1-9	452	240	135	257	169	344	88	246	135
	89%	88%	90%	89%	92%	90%	90%	88%	89%
10-19	29	16	9	19	7	22	4	17	10
	6%	6%	6%	6%	4%	6%	4%	6%	6%
20-49	14	10	2	9	4	11	3	10	4
	3%	4%	2%	3%	2%	3%	3%	3%	3%
50-99	5	2	2	3	2	3	2	3	1
	1%	1%	1%	1%	1%	1%	2%	1%	1%
100-199	3	3	*	1	1	2	*	2	*
	1%	1%	*	*	1%	1%	*	1%	*
200-249	*	*	-	-	*	-	*	*	-
	*	*	-	-	*	-	*	*	-
250-499	*	*	-	-	*	-	*	-	*
	*	*	-	-	*	-	*	-	*
500+	2	1	1	1	*	2	*	1	1
	*	*	1%	*	*	*	*	*	*
Net: 10+	54	32	15	33	15	40	10	32	16
	11%	12%	10%	11%	8%	10%	10%	12%	11%
BCC nets									
1-19	481	256	144	275	177	366	93	263	144
	95%	94%	96%	95%	96%	95%	94%	94%	96%
20-199	22	15	5	13	7	16	5	14	6
	4%	5%	3%	5%	4%	4%	5%	5%	4%
200-499	1	1	-	-	1	-	1	*	*
	*	*	-	-	*	-	1%	*	*

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	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%
500+	2	1	1	1	*	2	*	1	1
	*	*	1%	*	*	*	*	*	*
ONS nets									
0-9	452	240	135	257	169	344	88	246	135
	89%	88%	90%	89%	92%	90%	90%	88%	89%
10-19	29	16	9	19	7	22	4	17	10
	6%	6%	6%	6%	4%	6%	4%	6%	6%
20-49	14	10	2	9	4	11	3	10	4
	3%	4%	2%	3%	2%	3%	3%	3%	3%
50-99	5	2	2	3	2	3	2	3	1
	1%	1%	1%	1%	1%	1%	2%	1%	1%
100-249	3	3	*	1	1	2	1	2	*
	1%	1%	*	*	1%	1%	1%	1%	*
250+	3	1	1	1	1	2	1	1	1
	1%	1%	1%	*	*	*	1%	*	1%

QES Q2 2014

D1 How many people does your company employ?

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%
1-9	452	82	-	-	-	82	370	-	-	-	370
	89%	94%	-	-	-	91%	94%	-	-	-	89%
10-19	29	5	-	-	-	5	24	-	-	-	24
	6%	6%	-	-	-	6%	6%	-	-	-	6%
20-49	14	-	2	-	-	2	-	12	-	-	12
	3%	-	67%	-	-	2%	-	64%	-	-	3%
50-99	5	-	1	-	-	1	-	4	-	-	4
	1%	-	33%	-	-	1%	-	21%	-	-	1%
100-199	3	-	-	-	-	-	-	3	-	-	3
	1%	-	-	-	-	-	-	15%	-	-	1%
200-249	*	-	-	-	-	-	-	-	*	-	*
	*	-	-	-	-	-	-	-	39%	-	*
250-499	*	-	-	-	-	-	-	-	*	-	*
	*	-	-	-	-	-	-	-	61%	-	*
500+	2	-	-	-	*	*	-	-	-	2	2
	*	-	-	-	100%	*	-	-	-	100%	*
Net: 10+	54	5	3	-	*	9	24	19	1	2	45
	11%	6%	100%	-	100%	9%	6%	100%	100%	100%	11%
BCC nets											
1-19	481	88	-	-	-	88	394	-	-	-	394
	95%	100%	-	-	-	96%	100%	-	-	-	95%
20-199	22	-	3	-	-	3	-	19	-	-	19
	4%	-	100%	-	-	3%	-	100%	-	-	5%
200-499	1	-	-	-	-	-	-	-	1	-	1
	*	-	-	-	-	-	-	-	100%	-	*
500+	2	-	-	-	*	*	-	-	-	2	2
	*	-	-	-	100%	*	-	-	-	100%	*

QES Q2 2014

D1 How many people does your company employ?

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%
ONS nets											
0-9	452	82	-	-	-	82	370	-	-	-	370
	89%	94%	-	-	-	91%	94%	-	-	-	89%
10-19	29	5	-	-	-	5	24	-	-	-	24
	6%	6%	-	-	-	6%	6%	-	-	-	6%
20-49	14	-	2	-	-	2	-	12	-	-	12
	3%	-	67%	-	-	2%	-	64%	-	-	3%
50-99	5	-	1	-	-	1	-	4	-	-	4
	1%	-	33%	-	-	1%	-	21%	-	-	1%
100-249	3	-	-	-	-	-	-	3	*	-	3
	1%	-	-	-	-	-	-	15%	39%	-	1%
250+	3	-	-	-	*	*	-	-	*	2	2
	1%	-	-	-	100%	*	-	-	61%	100%	1%

QES Q2 2014

D2 Which of the following best describes your company sector?

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%
Communication, technical and creative	77	70	7	-	77	52	25	11	63	3	10	67	24	53	12	64	1
	15%	16%	12%	-	19%	19%	11%	14%	16%	10%	13%	16%	13%	16%	13%	16%	7%
Legal and business services	55	51	4	-	55	31	24	9	40	6	8	47	19	37	7	47	1
	11%	11%	8%	-	13%	11%	11%	12%	10%	19%	10%	11%	11%	11%	7%	12%	7%
Professions	44	39	4	-	44	19	25	5	37	2	8	36	14	30	4	38	1
	9%	9%	8%	-	11%	7%	11%	6%	9%	6%	10%	8%	8%	9%	5%	10%	7%
Finance, insurance and financial services	43	32	11	-	43	32	11	7	32	4	9	34	10	33	7	35	1
	8%	7%	20%	-	10%	11%	5%	8%	8%	14%	11%	8%	6%	10%	7%	9%	7%
Property and construction	41	37	4	41	-	18	24	11	28	2	5	36	18	24	14	26	1
	8%	8%	8%	46%	-	6%	11%	14%	7%	8%	7%	8%	10%	7%	15%	7%	7%
Retail and wholesale	35	31	4	-	35	14	21	4	31	*	6	29	13	23	11	22	2
	7%	7%	8%	-	9%	5%	10%	5%	8%	1%	8%	7%	7%	7%	11%	6%	15%
Hospitality, leisure and tourism	30	26	4	-	30	20	10	7	21	2	7	23	11	19	6	19	5
	6%	6%	8%	-	7%	7%	5%	9%	5%	8%	9%	5%	6%	6%	7%	5%	30%
Education and scientific	26	21	5	-	26	10	16	3	21	3	4	22	11	16	5	19	2
	5%	5%	9%	-	6%	4%	7%	3%	5%	9%	5%	5%	6%	5%	5%	5%	10%
Manufacturing	18	17	1	18	-	7	11	7	11	-	2	16	4	14	4	14	-
	4%	4%	2%	20%	-	3%	5%	9%	3%	-	3%	4%	2%	4%	5%	3%	-
Public administration and health	12	12	*	-	12	6	6	1	11	*	*	12	5	8	1	11	-
	2%	3%	1%	-	3%	2%	3%	2%	3%	1%	*	3%	3%	2%	1%	3%	-
Transport and logistics	9	7	2	-	9	3	6	2	7	*	3	6	1	8	2	7	*
	2%	2%	3%	-	2%	1%	3%	2%	2%	1%	3%	1%	*	2%	2%	2%	1%
Mining and utilities	4	4	1	4	-	4	1	1	4	-	1	4	3	1	4	1	-
	1%	1%	1%	5%	-	1%	*	1%	1%	-	1%	1%	2%	*	4%	*	-
Defence and security	2	2	-	2	-	1	1	-	2	-	-	2	-	2	1	1	-
	*	1%	-	3%	-	*	1%	-	1%	-	-	1%	-	1%	1%	*	-

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	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
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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Other industry	25	23	2	25	-	13	12	6	18	2	5	20	14	11	7	18	-
	5%	5%	4%	27%	-	4%	6%	7%	4%	5%	6%	5%	8%	3%	7%	5%	-
Other services	83	79	4	-	83	52	31	7	71	5	11	71	32	50	11	71	1
	16%	17%	7%	-	20%	19%	14%	9%	18%	18%	14%	17%	18%	15%	11%	18%	7%
Nets																	
Manufacturing	91	82	9	91	-	42	49	24	63	4	13	78	38	53	31	59	1
	18%	18%	16%	100%	-	15%	22%	30%	16%	13%	16%	18%	22%	16%	31%	15%	7%
Services	415	370	45	-	415	240	175	55	334	26	67	348	138	277	67	333	15
	82%	82%	84%	-	100%	85%	78%	70%	84%	87%	84%	82%	78%	84%	69%	85%	93%

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	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%
Communication, technical and creative	77	37	29	45	25	53	22	33	29
	15%	14%	19%	16%	14%	14%	22%	12%	19%
Legal and business services	55	38	10	40	10	45	10	34	12
	11%	14%	6%	14%	6%	12%	10%	12%	8%
Professions	44	25	10	26	15	38	5	28	10
	9%	9%	7%	9%	8%	10%	5%	10%	7%
Finance, insurance and financial services	43	24	12	27	15	35	6	22	16
	8%	9%	8%	9%	8%	9%	7%	8%	10%
Property and construction	41	24	13	24	15	36	3	26	8
	8%	9%	9%	8%	8%	9%	3%	9%	5%
Retail and wholesale	35	17	11	19	12	32	3	21	12
	7%	6%	7%	7%	6%	8%	3%	7%	8%
Hospitality, leisure and tourism	30	13	11	16	15	23	7	16	12
	6%	5%	7%	5%	8%	6%	8%	6%	8%
Education and scientific	26	16	7	12	14	18	8	13	9
	5%	6%	5%	4%	8%	5%	8%	5%	6%
Manufacturing	18	10	6	13	4	13	2	10	4
	4%	4%	4%	4%	2%	3%	2%	4%	3%
Public administration and health	12	10	2	9	4	9	4	9	2
	2%	4%	1%	3%	2%	2%	4%	3%	2%
Transport and logistics	9	8	-	2	5	6	3	6	1
	2%	3%	-	1%	3%	2%	3%	2%	1%
Mining and utilities	4	2	1	3	1	4	1	4	-
	1%	1%	1%	1%	1%	1%	1%	1%	-
Defence and security	2	1	1	2	-	2	-	2	-
	*	*	1%	1%	-	1%	-	1%	-

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	Airport to be extended		Closing London Underground ticket offices		Raising threshold for a legal strike		High Speed Two		
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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%
Other industry	25	15	6	10	14	15	4	16	7
	5%	6%	4%	3%	7%	4%	4%	6%	5%
Other services	83	33	31	41	38	55	20	38	29
	16%	12%	21%	14%	20%	14%	21%	14%	19%
Nets									
Manufacturing	91	53	28	53	33	70	10	59	19
	18%	19%	19%	18%	18%	18%	10%	21%	13%
Services	415	220	122	237	152	313	89	219	132
	82%	81%	81%	82%	82%	82%	90%	79%	87%

QES Q2 2014

D2 Which of the following best describes your company sector?

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%
Communication, technical and creative	77	-	-	-	-	-	75	2	-	-	77
	15%	-	-	-	-	-	19%	9%	-	-	19%
Legal and business services	55	-	-	-	-	-	53	2	*	-	55
	11%	-	-	-	-	-	14%	9%	39%	-	13%
Professions	44	-	-	-	-	-	42	1	*	-	44
	9%	-	-	-	-	-	11%	8%	61%	-	11%
Finance, insurance and financial services	43	-	-	-	-	-	38	4	-	*	43
	8%	-	-	-	-	-	10%	23%	-	20%	10%
Property and construction	41	40	2	-	-	41	-	-	-	-	-
	8%	45%	62%	-	-	46%	-	-	-	-	-
Retail and wholesale	35	-	-	-	-	-	34	2	-	-	35
	7%	-	-	-	-	-	9%	9%	-	-	9%
Hospitality, leisure and tourism	30	-	-	-	-	-	28	2	-	*	30
	6%	-	-	-	-	-	7%	11%	-	20%	7%
Education and scientific	26	-	-	-	-	-	23	3	-	1	26
	5%	-	-	-	-	-	6%	15%	-	40%	6%
Manufacturing	18	17	*	-	*	18	-	-	-	-	-
	4%	20%	13%	-	100%	20%	-	-	-	-	-
Public administration and health	12	-	-	-	-	-	12	-	-	*	12
	2%	-	-	-	-	-	3%	-	-	20%	3%
Transport and logistics	9	-	-	-	-	-	7	2	-	-	9
	2%	-	-	-	-	-	2%	9%	-	-	2%
Mining and utilities	4	4	-	-	-	4	-	-	-	-	-
	1%	5%	-	-	-	5%	-	-	-	-	-
Defence and security	2	2	-	-	-	2	-	-	-	-	-
	*	3%	-	-	-	3%	-	-	-	-	-
Other industry	25	24	1	-	-	25	-	-	-	-	-
	5%	28%	24%	-	-	27%	-	-	-	-	-

QES Q2 2014

D2 Which of the following best describes your company sector?

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%
Other services	83	-	-	-	-	-	81	1	-	-	83
	16%	-	-	-	-	-	21%	7%	-	-	20%
Nets											
Manufacturing	91	88	3	-	*	91	-	-	-	-	-
	18%	100%	100%	-	100%	100%	-	-	-	-	-
Services	415	-	-	-	-	-	394	19	1	2	415
	82%	-	-	-	-	-	100%	100%	100%	100%	100%

QES Q2 2014

D3 Which London borough is your business based in?

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%
Barking and Dagenham	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Barnet	36	32	4	10	26	-	36	3	32	1	3	33	14	22	6	30	-
	7%	7%	7%	11%	6%	-	16%	3%	8%	4%	3%	8%	8%	7%	6%	8%	-
Bexley	1	-	1	-	1	-	1	1	-	-	-	1	-	1	-	1	-
	*	-	1%	-	*	-	*	1%	-	-	-	*	-	*	-	*	-
Brent	10	8	2	5	5	-	10	3	7	-	1	9	2	8	-	10	-
	2%	2%	3%	5%	1%	-	4%	3%	2%	-	1%	2%	1%	2%	-	3%	-
Bromley	10	10	1	2	8	-	10	1	10	-	1	10	5	5	1	9	-
	2%	2%	1%	2%	2%	-	4%	1%	2%	-	1%	2%	3%	1%	1%	2%	-
Camden	28	24	5	5	24	28	-	6	21	1	8	21	9	19	3	24	1
	6%	5%	9%	5%	6%	10%	-	8%	5%	5%	10%	5%	5%	6%	3%	6%	7%
City of London	23	16	8	2	21	23	-	5	16	3	7	16	12	11	2	21	-
	5%	3%	14%	2%	5%	8%	-	6%	4%	9%	9%	4%	7%	3%	2%	5%	-
City of Westminster	42	35	8	7	35	42	-	11	28	3	15	27	15	27	8	34	*
	8%	8%	14%	7%	9%	15%	-	15%	7%	10%	19%	6%	9%	8%	8%	9%	2%
Croydon	17	16	1	-	17	-	17	1	11	4	3	14	5	12	4	12	-
	3%	3%	2%	-	4%	-	7%	2%	3%	14%	4%	3%	3%	4%	4%	3%	-
Ealing	11	10	2	2	9	-	11	*	9	2	2	9	4	7	3	8	-
	2%	2%	3%	3%	2%	-	5%	*	2%	6%	3%	2%	2%	2%	3%	2%	-
Enfield	15	14	1	4	11	-	15	2	12	1	-	15	4	11	1	12	1
	3%	3%	1%	4%	3%	-	7%	2%	3%	4%	-	3%	2%	3%	1%	3%	7%
Greenwich	7	6	1	2	4	-	7	-	5	1	-	7	1	5	1	5	-
	1%	1%	1%	3%	1%	-	3%	-	1%	4%	-	2%	1%	2%	1%	1%	-
Hackney	14	13	1	2	12	14	-	2	11	2	2	12	2	12	4	11	-
	3%	3%	2%	3%	3%	5%	-	2%	3%	5%	2%	3%	1%	4%	4%	3%	-

QES Q2 2014

D3 Which London borough is your business based in?

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%
Hammersmith and Fulham	27	25	2	3	24	27	-	4	23	-	2	26	6	21	5	20	2
	5%	6%	4%	3%	6%	10%	-	5%	6%	-	2%	6%	3%	7%	5%	5%	15%
Haringey	10	10	-	4	6	10	-	1	7	1	1	8	1	8	4	6	-
	2%	2%	-	4%	1%	3%	-	2%	2%	4%	1%	2%	1%	3%	4%	2%	-
Harrow	15	13	2	2	14	-	15	-	15	-	-	15	6	9	-	15	-
	3%	3%	4%	2%	3%	-	7%	-	4%	-	-	4%	3%	3%	-	4%	-
Havering	5	5	1	1	4	-	5	-	5	-	1	5	3	2	4	2	-
	1%	1%	1%	1%	1%	-	2%	-	1%	-	1%	1%	2%	1%	4%	*	-
Hillingdon	8	7	*	1	6	-	8	2	6	-	2	6	2	6	-	8	-
	1%	2%	1%	1%	2%	-	3%	2%	2%	-	2%	1%	1%	2%	-	2%	-
Hounslow	16	14	2	5	11	-	16	1	15	*	2	14	6	11	3	13	*
	3%	3%	4%	6%	3%	-	7%	1%	4%	1%	3%	3%	3%	3%	3%	3%	1%
Islington	17	16	2	*	17	17	-	-	16	1	1	16	8	10	2	14	1
	3%	3%	3%	*	4%	6%	-	-	4%	4%	2%	4%	4%	3%	2%	4%	7%
Kensington and Chelsea	29	26	2	8	20	29	-	6	22	1	4	24	10	19	8	19	1
	6%	6%	4%	9%	5%	10%	-	7%	5%	4%	5%	6%	6%	6%	8%	5%	7%
Kingston upon Thames	14	12	2	3	11	-	14	4	8	1	4	10	5	8	3	10	-
	3%	3%	3%	3%	3%	-	6%	5%	2%	4%	5%	2%	3%	3%	4%	3%	-
Lambeth	21	19	1	2	18	21	-	4	15	2	3	18	5	15	7	14	-
	4%	4%	3%	3%	4%	7%	-	5%	4%	6%	3%	4%	3%	5%	7%	3%	-
Lewisham	10	10	1	1	10	10	-	2	8	-	3	7	4	6	1	9	-
	2%	2%	1%	1%	2%	4%	-	3%	2%	-	4%	2%	2%	2%	1%	2%	-
Merton	14	13	1	1	13	-	14	3	11	-	3	11	8	7	6	8	-
	3%	3%	2%	1%	3%	-	6%	4%	3%	-	4%	3%	4%	2%	6%	2%	-
Newham	2	2	-	-	2	2	-	-	2	-	-	2	-	2	-	2	-
	*	1%	-	-	1%	1%	-	-	1%	-	-	1%	-	1%	-	1%	-

QES Q2 2014

D3 Which London borough is your business based in?

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%
Redbridge	7	7	*	2	6	-	7	*	7	-	2	6	5	3	4	3	1
	1%	2%	1%	2%	1%	-	3%	*	2%	-	2%	1%	3%	1%	4%	1%	7%
Richmond upon Thames	27	25	2	6	20	-	27	5	21	-	4	23	9	18	4	21	1
	5%	6%	3%	7%	5%	-	12%	7%	5%	-	5%	5%	5%	5%	4%	5%	7%
Southwark	21	19	2	5	16	21	-	3	18	-	3	18	9	12	4	15	2
	4%	4%	4%	6%	4%	7%	-	4%	5%	-	3%	4%	5%	4%	4%	4%	15%
Sutton	6	6	-	-	6	-	6	-	6	-	-	6	1	5	-	5	1
	1%	1%	-	-	1%	-	3%	-	2%	-	-	1%	1%	1%	-	1%	7%
Tower Hamlets	16	14	2	-	16	16	-	5	6	5	4	12	3	13	4	12	-
	3%	3%	3%	-	4%	6%	-	6%	1%	18%	6%	3%	2%	4%	4%	3%	-
Waltham Forest	6	6	*	2	4	-	6	2	5	-	*	6	3	4	2	4	1
	1%	1%	1%	3%	1%	-	3%	2%	1%	-	*	1%	2%	1%	2%	1%	7%
Wandsworth	21	20	1	2	19	21	-	2	19	-	2	19	10	11	6	14	1
	4%	4%	1%	3%	4%	7%	-	3%	5%	-	2%	5%	6%	3%	6%	4%	7%
Outside London	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																	
Inner London	282	248	33	42	240	282	-	52	211	19	54	227	94	188	56	216	10
	56%	55%	62%	46%	58%	100%	-	65%	53%	64%	68%	53%	53%	57%	58%	55%	62%
Outer London	224	204	20	49	175	-	224	27	186	11	26	199	82	142	41	177	6
	44%	45%	38%	54%	42%	-	100%	35%	47%	36%	32%	47%	47%	43%	42%	45%	38%

QES Q2 2014

D3 Which London borough is your business based in?

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%
Barking and Dagenham	-	-	-	-	-	-	-	-	-
Barnet	36 7%	21 8%	4 3%	19 7%	11 6%	30 8%	4 4%	18 6%	9 6%
Bexley	1 *	- -	1 *	- -	1 *	1 *	- -	1 *	- -
Brent	10 2%	9 3%	1 1%	2 1%	7 4%	6 2%	2 2%	6 2%	- -
Bromley	10 2%	1 *	7 5%	5 2%	4 2%	7 2%	2 2%	3 1%	4 2%
Camden	28 6%	18 7%	6 4%	17 6%	11 6%	22 6%	5 5%	10 4%	11 7%
City of London	23 5%	16 6%	5 3%	12 4%	10 5%	17 4%	6 6%	12 4%	11 7%
City of Westminster	42 8%	27 10%	14 9%	28 10%	13 7%	33 9%	8 9%	27 10%	9 6%
Croydon	17 3%	2 1%	11 7%	8 3%	4 2%	14 4%	2 2%	8 3%	4 2%
Ealing	11 2%	6 2%	4 2%	9 3%	2 1%	11 3%	* *	7 2%	3 2%
Enfield	15 3%	7 2%	2 2%	9 3%	6 3%	8 2%	6 6%	8 3%	5 4%
Greenwich	7 1%	1 *	3 2%	3 1%	4 2%	3 1%	2 2%	3 1%	4 2%
Hackney	14 3%	12 5%	1 *	6 2%	9 5%	8 2%	5 5%	9 3%	3 2%

QES Q2 2014

D3 Which London borough is your business based in?

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%
Hammersmith and Fulham	27	11	14	14	12	21	5	12	8
	5%	4%	9%	5%	6%	6%	5%	4%	5%
Haringey	10	6	1	6	4	7	2	4	5
	2%	2%	1%	2%	2%	2%	2%	1%	3%
Harrow	15	12	-	10	4	12	4	8	6
	3%	4%	-	3%	2%	3%	4%	3%	4%
Havering	5	2	2	5	-	5	-	4	2
	1%	1%	1%	2%	-	1%	-	1%	1%
Hillingdon	8	5	1	6	1	4	4	6	-
	1%	2%	1%	2%	1%	1%	4%	2%	-
Hounslow	16	10	5	5	9	12	4	11	3
	3%	4%	3%	2%	5%	3%	4%	4%	2%
Islington	17	12	2	11	6	12	4	7	6
	3%	4%	1%	4%	3%	3%	4%	3%	4%
Kensington and Chelsea	29	21	4	16	12	24	2	11	12
	6%	8%	2%	6%	6%	6%	2%	4%	8%
Kingston upon Thames	14	5	6	9	5	11	2	8	5
	3%	2%	4%	3%	3%	3%	2%	3%	4%
Lambeth	21	12	9	9	10	14	6	12	8
	4%	4%	6%	3%	5%	4%	6%	4%	6%
Lewisham	10	1	7	7	2	7	2	6	4
	2%	*	5%	2%	1%	2%	2%	2%	3%
Merton	14	7	3	11	4	11	3	11	1
	3%	2%	2%	4%	2%	3%	3%	4%	1%
Newham	2	-	2	1	1	1	1	2	-
	*	-	2%	*	1%	*	1%	1%	-

QES Q2 2014

D3 Which London borough is your business based in?

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%
Redbridge	7	6	-	5	2	6	1	5	1
	1%	2%	-	2%	1%	2%	1%	2%	1%
Richmond upon Thames	27	15	5	15	7	24	2	19	4
	5%	6%	4%	5%	4%	6%	2%	7%	3%
Southwark	21	11	9	11	9	14	6	13	6
	4%	4%	6%	4%	5%	4%	6%	5%	4%
Sutton	6	-	4	2	-	5	1	1	4
	1%	-	2%	1%	-	1%	1%	*	2%
Tower Hamlets	16	6	5	11	5	11	3	7	7
	3%	2%	3%	4%	3%	3%	3%	3%	5%
Waltham Forest	6	*	5	5	1	5	-	4	1
	1%	*	3%	2%	1%	1%	-	1%	1%
Wandsworth	21	11	8	12	9	17	3	15	5
	4%	4%	6%	4%	5%	4%	3%	5%	3%
Outside London	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-
Nets									
Inner London	282	163	87	161	113	209	57	149	95
	56%	60%	58%	55%	61%	55%	58%	53%	63%
Outer London	224	109	63	129	72	174	41	130	56
	44%	40%	42%	45%	39%	45%	42%	47%	37%

QES Q2 2014

D3 Which London borough is your business based in?

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%
Barking and Dagenham	-	-	-	-	-	-	-	-	-	-	-
Barnet	36	10	1	-	-	10	24	2	-	*	26
	7%	11%	27%	-	-	11%	6%	8%	-	20%	6%
Bexley	1	-	-	-	-	-	1	-	-	-	1
	*	-	-	-	-	-	*	-	-	-	*
Brent	10	5	-	-	-	5	4	1	-	-	5
	2%	5%	-	-	-	5%	1%	5%	-	-	1%
Bromley	10	2	-	-	-	2	8	-	-	-	8
	2%	2%	-	-	-	2%	2%	-	-	-	2%
Camden	28	4	1	-	-	5	23	1	-	-	24
	6%	5%	27%	-	-	5%	6%	3%	-	-	6%
City of London	23	2	-	-	-	2	15	5	*	*	21
	5%	3%	-	-	-	2%	4%	25%	61%	20%	5%
City of Westminster	42	7	*	-	-	7	30	5	-	*	35
	8%	7%	11%	-	-	7%	8%	25%	-	20%	9%
Croydon	17	-	-	-	-	-	17	-	-	-	17
	3%	-	-	-	-	-	4%	-	-	-	4%
Ealing	11	2	-	-	-	2	8	1	-	-	9
	2%	3%	-	-	-	3%	2%	3%	-	-	2%
Enfield	15	4	-	-	-	4	11	-	-	-	11
	3%	4%	-	-	-	4%	3%	-	-	-	3%
Greenwich	7	2	-	-	-	2	4	-	-	-	4
	1%	3%	-	-	-	3%	1%	-	-	-	1%
Hackney	14	2	-	-	-	2	11	*	-	*	12
	3%	3%	-	-	-	3%	3%	2%	-	20%	3%
Hammersmith and Fulham	27	3	-	-	-	3	24	-	-	-	24
	5%	3%	-	-	-	3%	6%	-	-	-	6%

QES Q2 2014

D3 Which London borough is your business based in?

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%
Haringey	10	4	-	-	-	4	6	-	-	-	6
	2%	4%	-	-	-	4%	2%	-	-	-	1%
Harrow	15	2	-	-	-	2	14	-	-	-	14
	3%	2%	-	-	-	2%	3%	-	-	-	3%
Havering	5	1	-	-	-	1	4	-	-	-	4
	1%	1%	-	-	-	1%	1%	-	-	-	1%
Hillingdon	8	1	-	-	-	1	6	*	-	-	6
	1%	1%	-	-	-	1%	2%	2%	-	-	2%
Hounslow	16	5	-	-	-	5	11	1	-	-	11
	3%	6%	-	-	-	6%	3%	3%	-	-	3%
Islington	17	-	*	-	-	*	16	1	-	-	17
	3%	-	13%	-	-	*	4%	4%	-	-	4%
Kensington and Chelsea	29	8	-	-	-	8	19	1	*	-	20
	6%	10%	-	-	-	9%	5%	5%	39%	-	5%
Kingston upon Thames	14	3	-	-	-	3	11	-	-	-	11
	3%	3%	-	-	-	3%	3%	-	-	-	3%
Lambeth	21	2	-	-	-	2	18	*	-	-	18
	4%	3%	-	-	-	3%	5%	2%	-	-	4%
Lewisham	10	1	-	-	-	1	10	-	-	-	10
	2%	1%	-	-	-	1%	2%	-	-	-	2%
Merton	14	1	-	-	-	1	13	-	-	-	13
	3%	1%	-	-	-	1%	3%	-	-	-	3%
Newham	2	-	-	-	-	-	2	-	-	-	2
	*	-	-	-	-	-	1%	-	-	-	1%
Redbridge	7	1	*	-	-	2	6	-	-	-	6
	1%	1%	11%	-	-	2%	2%	-	-	-	1%
Richmond upon Thames	27	6	-	-	*	6	20	1	-	-	20
	5%	7%	-	-	100%	7%	5%	3%	-	-	5%

QES Q2 2014

D3 Which London borough is your business based in?

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%
Southwark	21	5	*	-	-	5	15	1	-	-	16
	4%	5%	11%	-	-	6%	4%	3%	-	-	4%
Sutton	6	-	-	-	-	-	6	-	-	-	6
	1%	-	-	-	-	-	2%	-	-	-	1%
Tower Hamlets	16	-	-	-	-	-	15	1	-	-	16
	3%	-	-	-	-	-	4%	3%	-	-	4%
Waltham Forest	6	2	-	-	-	2	4	*	-	-	4
	1%	3%	-	-	-	3%	1%	2%	-	-	1%
Wandsworth	21	2	-	-	-	2	18	*	-	*	19
	4%	3%	-	-	-	3%	5%	2%	-	20%	4%
Outside London	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Nets											
Inner London	282	40	2	-	-	42	224	14	1	1	240
	56%	46%	62%	-	-	46%	57%	73%	100%	80%	58%
Outer London	224	47	1	-	*	49	170	5	-	*	175
	44%	54%	38%	-	100%	54%	43%	27%	-	20%	42%

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Summary table

Base: All respondents

	Total	Up	Same	Down	Mean score
Cashflow	506 100%	142 28%	243 48%	121 24%	.04
Domestic sales	506 100%	139 27%	292 58%	75 15%	.12
Business domestic orders	506 100%	110 22%	329 65%	67 13%	.08
Employment	506 100%	59 12%	405 80%	42 8%	.03
Export sales	506 100%	54 11%	402 79%	50 10%	.01
Business export orders	506 100%	47 9%	409 81%	50 10%	-.01

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Domestic sales

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%	
Up	(1.0)	139	117	22	34	104	83	56	40	96	3	40	98	62	77	34	101	4
		27%	26%	40%	38%	25%	29%	25%	50%	24%	9%	51%	23%	35%	23%	35%	26%	22%
Same	(0.0)	292	267	25	54	238	149	143	36	241	15	32	260	104	189	48	238	6
		58%	59%	46%	59%	57%	53%	64%	46%	61%	49%	40%	61%	59%	57%	49%	61%	38%
Down	(-1.0)	75	68	7	3	73	50	25	3	59	13	8	68	11	64	16	53	6
		15%	15%	14%	3%	17%	18%	11%	4%	15%	42%	10%	16%	6%	19%	16%	14%	39%
Mean Score		.12	.11	.27	.35	.08	.12	.14	.46	.09	-.33	.41	.07	.29	.04	.19	.12	-.17

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Domestic sales

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%	
Up	(1.0)	139	80	40	83	48	106	30	86	35
		27%	29%	26%	29%	26%	28%	31%	31%	23%
Same	(0.0)	292	161	83	164	109	224	51	160	87
		58%	59%	55%	57%	59%	59%	52%	57%	57%
Down	(-1.0)	75	31	28	43	28	53	17	32	29
		15%	11%	18%	15%	15%	14%	18%	12%	19%
Mean Score		.12	.18	.08	.14	.11	.14	.13	.19	.04

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Domestic sales

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Up	(1.0)	139	33	1	-	*	34	95	8	*	1	104
		27%	37%	51%	-	100%	38%	24%	42%	61%	40%	25%
Same	(0.0)	292	53	1	-	-	54	228	9	*	1	238
		58%	60%	38%	-	-	59%	58%	49%	39%	40%	57%
Down	(-1.0)	75	2	*	-	-	3	70	2	-	*	73
		15%	3%	11%	-	-	3%	18%	9%	-	20%	17%
Mean Score		.12	.34	.40	-	1.00	.35	.06	.32	.61	.20	.08

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business domestic orders

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%	
Up	(1.0)	110	91	19	22	87	62	48	34	72	3	33	77	47	63	29	80	1
		22%	20%	36%	25%	21%	22%	22%	44%	18%	10%	42%	18%	27%	19%	30%	20%	7%
Same	(0.0)	329	300	30	64	265	177	152	42	272	15	40	290	122	208	61	260	8
		65%	66%	55%	71%	64%	63%	68%	53%	69%	51%	50%	68%	69%	63%	62%	66%	52%
Down	(-1.0)	67	62	5	4	63	43	24	3	52	12	7	60	8	59	8	52	7
		13%	14%	9%	5%	15%	15%	11%	4%	13%	39%	9%	14%	5%	18%	8%	13%	41%
Mean Score		.08	.06	.27	.20	.06	.11	.40	.05	-.29	.33	.04	.22	.01	.21	.07	-.33	

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business domestic orders

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%	
Up	(1.0)	110	62	38	66	40	85	23	65	31
		22%	23%	25%	23%	21%	22%	23%	23%	20%
Same	(0.0)	329	180	88	184	122	252	60	181	97
		65%	66%	59%	63%	66%	66%	61%	65%	64%
Down	(-1.0)	67	30	24	40	24	46	16	32	23
		13%	11%	16%	14%	13%	12%	16%	11%	15%
Mean Score		.08	.12	.09	.09	.09	.10	.07	.12	.05

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business domestic orders

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Up	(1.0)	110	21	1	-	*	22	81	6	-	*	87
		22%	24%	27%	-	100%	25%	21%	34%	-	20%	21%
Same	(0.0)	329	62	2	-	-	64	252	11	1	1	265
		65%	71%	73%	-	-	71%	64%	57%	100%	60%	64%
Down	(-1.0)	67	4	-	-	-	4	61	2	-	*	63
		13%	5%	-	-	-	5%	15%	10%	-	20%	15%
Mean Score		.08	.20	.27	-	1.00	.20	.05	.24	-	-	.06

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Export sales

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%	
Up	(1.0)	54	45	9	8	46	35	20	18	37	-	16	38	24	30	18	33	4
		11%	10%	17%	9%	11%	12%	9%	23%	9%	-	20%	9%	14%	9%	18%	8%	22%
Same	(0.0)	402	360	41	80	322	212	190	57	324	21	57	345	144	258	72	325	4
		79%	80%	77%	88%	78%	75%	85%	72%	82%	68%	71%	81%	81%	78%	74%	83%	26%
Down	(-1.0)	50	47	3	3	47	35	15	4	36	10	7	43	9	41	7	34	8
		10%	10%	6%	3%	11%	12%	7%	5%	9%	32%	9%	10%	5%	12%	8%	9%	52%
Mean Score		.01	*	.11	.06	*	*	.02	.17	*	-.32	.11	-.01	.09	-.03	.10	*	-.30

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Export sales

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%	
Up	(1.0)	54	34	16	27	23	39	14	32	14
		11%	12%	11%	9%	12%	10%	14%	12%	9%
Same	(0.0)	402	211	117	236	141	315	69	226	117
		79%	77%	78%	81%	76%	82%	70%	81%	77%
Down	(-1.0)	50	28	16	27	21	30	16	20	20
		10%	10%	11%	9%	11%	8%	16%	7%	13%
Mean Score		.01	.02	*	*	.01	.02	-.01	.04	-.04

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Export sales

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%
Up	(1.0)	54	8	*	-	*	8	40	5	*	-	46
		11%	9%	13%	-	100%	9%	10%	28%	39%	-	11%
Same	(0.0)	402	77	2	-	-	80	308	13	*	1	322
		79%	88%	87%	-	-	88%	78%	66%	61%	60%	78%
Down	(-1.0)	50	3	-	-	-	3	45	1	-	1	47
		10%	3%	-	-	-	3%	11%	5%	-	40%	11%
Mean Score		.01	.05	.13	-	1.00	.06	-.01	.23	.39	-.40	*

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business export orders

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%	
Up	(1.0)	47	38	9	7	41	30	17	23	23	2	19	28	20	27	15	29	2
		9%	8%	17%	7%	10%	11%	8%	29%	6%	5%	24%	7%	11%	8%	16%	8%	15%
Same	(0.0)	409	369	40	78	331	219	191	54	336	19	56	353	146	263	76	326	8
		81%	82%	75%	86%	80%	78%	85%	68%	85%	65%	70%	83%	83%	80%	78%	83%	48%
Down	(-1.0)	50	45	4	6	44	33	16	2	38	9	5	45	11	39	7	37	6
		10%	10%	8%	7%	11%	12%	7%	3%	10%	30%	6%	10%	6%	12%	7%	9%	37%
Mean Score		-.01	-.02	.09	.01	-.01	.01	.26	-.04	-.25	.17	-.04	.05	-.04	.09	-.02	-.22	

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business export orders

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%	
Up	(1.0)	47	37	8	32	14	41	6	30	12
		9%	13%	6%	11%	8%	11%	6%	11%	8%
Same	(0.0)	409	211	123	233	149	311	79	226	118
		81%	77%	82%	80%	81%	81%	81%	81%	78%
Down	(-1.0)	50	25	18	26	21	32	13	23	21
		10%	9%	12%	9%	12%	8%	13%	8%	14%
Mean Score		-.01	.04	-.07	.02	-.04	.02	-.07	.02	-.06

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business export orders

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Up	(1.0)	47	6	*	-	*	7	36	5	*	-	41
		9%	7%	13%	-	100%	7%	9%	25%	39%	-	10%
Same	(0.0)	409	76	2	-	-	78	316	13	*	1	331
		81%	87%	87%	-	-	86%	80%	68%	61%	80%	80%
Down	(-1.0)	50	6	-	-	-	6	42	1	-	*	44
		10%	7%	-	-	-	7%	11%	7%	-	20%	11%
Mean Score		-.01	*	.13	-	1.00	.01	-.02	.18	.39	-.20	-.01

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Employment

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%	
Up	(1.0)	59	43	16	11	48	38	21	31	27	1	40	18	30	29	14	45	-
		12%	9%	29%	12%	12%	14%	9%	40%	7%	2%	51%	4%	17%	9%	14%	12%	-
Same	(0.0)	405	375	30	72	333	215	190	42	347	17	33	372	139	266	74	320	12
		80%	83%	56%	79%	80%	76%	85%	53%	87%	55%	42%	87%	79%	81%	75%	81%	74%
Down	(-1.0)	42	35	8	8	34	29	14	6	23	13	6	36	8	34	10	28	4
		8%	8%	14%	9%	8%	10%	6%	7%	6%	43%	8%	8%	4%	10%	11%	7%	26%
Mean Score		.03	.02	.15	.03	.03	.03	.03	.32	.01	-.41	.43	-.04	.12	-.02	.03	.04	-.26

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Employment

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%	
Up	(1.0)	59	31	21	37	22	44	11	38	13
		12%	11%	14%	13%	12%	12%	11%	14%	9%
Same	(0.0)	405	220	112	231	145	311	77	217	126
		80%	81%	75%	80%	79%	81%	79%	78%	83%
Down	(-1.0)	42	22	17	22	18	28	10	23	12
		8%	8%	11%	8%	10%	7%	11%	8%	8%
Mean Score		.03	.03	.03	.05	.02	.04	*	.05	.01

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Employment

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Up	(1.0)	59	10	*	-	-	11	41	6	*	*	48
		12%	12%	13%	-	-	12%	10%	33%	39%	20%	12%
Same	(0.0)	405	70	2	-	*	72	321	10	-	1	333
		80%	79%	76%	-	100%	79%	82%	54%	-	80%	80%
Down	(-1.0)	42	8	*	-	-	8	31	3	*	-	34
		8%	9%	11%	-	-	9%	8%	14%	61%	-	8%
Mean Score		.03	.03	.02	-	-	.03	.02	.19	-.21	.20	.03

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Cashflow

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%	
Up	(1.0)	142	123	19	31	111	84	59	44	94	4	36	106	64	79	35	106	1
		28%	27%	36%	35%	27%	30%	26%	56%	24%	14%	45%	25%	36%	24%	36%	27%	7%
Same	(0.0)	243	220	23	41	202	125	118	28	208	7	29	214	93	150	41	195	6
		48%	49%	43%	45%	49%	44%	52%	35%	52%	25%	36%	50%	53%	45%	43%	50%	37%
Down	(-1.0)	121	110	11	19	102	73	48	7	95	18	15	106	20	101	21	91	9
		24%	24%	21%	21%	25%	26%	21%	9%	24%	61%	18%	25%	11%	31%	22%	23%	56%
Mean Score		.04	.03	.15	.14	.02	.04	.05	.46	*	-.47	.27	*	.25	-.07	.14	.04	-.48

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Cashflow

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%	
Up	(1.0)	142	76	40	86	50	111	24	94	36
		28%	28%	27%	30%	27%	29%	25%	34%	24%
Same	(0.0)	243	139	70	133	90	180	53	130	75
		48%	51%	47%	46%	49%	47%	54%	47%	49%
Down	(-1.0)	121	58	40	71	44	93	21	55	41
		24%	21%	26%	25%	24%	24%	21%	20%	27%
Mean Score		.04	.07	*	.05	.03	.05	.03	.14	-.03

QES Q2 2014

Q1 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Cashflow

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Up	(1.0)	142	31	1	-	-	31	102	7	1	1	111
		28%	35%	24%	-	-	35%	26%	37%	100%	40%	27%
Same	(0.0)	243	38	2	-	*	41	193	8	-	*	202
		48%	44%	65%	-	100%	45%	49%	43%	-	20%	49%
Down	(-1.0)	121	18	*	-	-	19	98	4	-	1	102
		24%	21%	11%	-	-	21%	25%	20%	-	40%	25%
Mean Score		.04	.14	.13	-	-	.14	.01	.17	1.00	-	.02

QES Q2 2014

Q2 How do you expect your workforce size to change over the next three months?

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%	
Increase	(1.0)	79	58	20	24	55	52	27	79	-	-	39	40	35	44	22	56	1
		16%	13%	38%	26%	13%	18%	12%	100%	-	-	49%	9%	20%	13%	22%	14%	7%
Stay the same	(0.0)	397	369	28	63	334	211	186	-	397	-	34	363	135	262	66	319	12
		78%	82%	53%	69%	80%	75%	83%	-	100%	-	42%	85%	77%	79%	68%	81%	74%
Fall	(-1.0)	30	25	5	4	26	19	11	-	-	30	8	23	7	24	10	17	3
		6%	6%	9%	4%	6%	7%	5%	-	-	100%	9%	5%	4%	7%	10%	4%	19%
Mean Score		.10	.07	.29	.22	.07	.11	.07	1.00	-	-1.00	.39	.04	.16	.06	.12	.10	-.11

QES Q2 2014

Q2 How do you expect your workforce size to change over the next three months?

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%	
Increase	(1.0)	79	48	22	54	22	63	11	53	13
		16%	18%	15%	19%	12%	17%	11%	19%	9%
Stay the same	(0.0)	397	206	119	219	152	299	79	210	126
		78%	76%	79%	76%	82%	78%	81%	76%	83%
Fall	(-1.0)	30	18	8	17	12	21	8	14	12
		6%	6%	6%	6%	6%	5%	8%	5%	8%
Mean Score		.10	.11	.09	.13	.05	.11	.03	.14	.01

QES Q2 2014

Q2 How do you expect your workforce size to change over the next three months?

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Increase	(1.0)	79	22	2	-	-	24	48	7	*	*	55
		16%	25%	65%	-	-	26%	12%	35%	39%	20%	13%
Stay the same	(0.0)	397	62	1	-	*	63	322	11	*	1	334
		78%	71%	24%	-	100%	69%	82%	56%	61%	60%	80%
Fall	(-1.0)	30	4	*	-	-	4	24	2	-	*	26
		6%	4%	11%	-	-	4%	6%	9%	-	20%	6%
Mean Score		.10	.21	.53	-	-	.22	.06	.26	.39	-	.07

QES Q2 2014

Q3 Have you tried to recruit in the past three months?

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%
Yes	80	49	31	13	67	54	26	39	34	8	80	-	38	42	19	58	3
	16%	11%	58%	14%	16%	19%	11%	49%	8%	25%	100%	-	22%	13%	20%	15%	16%
No	426	403	23	78	348	227	199	40	363	23	-	426	138	288	78	334	14
	84%	89%	42%	86%	84%	81%	89%	51%	92%	75%	-	100%	78%	87%	80%	85%	84%

QES Q2 2014

Q3 Have you tried to recruit in the past three months?

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%
Yes	80	44	21	52	23	60	14	49	15
	16%	16%	14%	18%	12%	16%	14%	18%	10%
No	426	228	129	238	162	323	85	230	136
	84%	84%	86%	82%	88%	84%	86%	82%	90%

QES Q2 2014

Q3 Have you tried to recruit in the past three months?

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%
Yes	80	10	2	-	*	13	53	13	*	1	67
	16%	12%	87%	-	100%	14%	13%	67%	39%	40%	16%
No	426	77	*	-	-	78	340	6	*	1	348
	84%	88%	13%	-	-	86%	87%	33%	61%	60%	84%

QES Q2 2014

Q4 Were the jobs...

Base: All who have tried to recruit in past three months

	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	117	41	76	21	96	79	38	58	47	12	117	-	59	58	30	84	3
Weighted Total	80	49	31	13	67	54	26	39	34	8	80	-	38	42	19	58	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Full-time	48	24	24	9	39	34	14	25	19	4	48	-	26	22	12	35	1
	60%	49%	77%	67%	58%	62%	55%	64%	55%	58%	60%	-	68%	52%	60%	60%	46%
Part-time	34	23	11	7	27	21	13	20	11	3	34	-	17	17	9	25	-
	43%	46%	37%	56%	40%	38%	53%	51%	33%	46%	43%	-	44%	42%	46%	43%	-
Temporary	25	17	9	3	22	17	8	8	16	2	25	-	10	16	3	21	1
	32%	34%	28%	25%	33%	32%	31%	19%	46%	29%	32%	-	25%	38%	16%	36%	54%
Permanent	15	6	9	3	13	9	6	7	6	2	15	-	6	9	4	11	-
	19%	12%	30%	20%	19%	17%	24%	17%	19%	27%	19%	-	16%	22%	21%	19%	-

QES Q2 2014

Q4 Were the jobs...

Base: All who have tried to recruit in past three months

	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	117	67	30	74	35	85	23	75	24
Weighted Total	80	44	21	52	23	60	14	49	15
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full-time	48	24	15	30	15	37	8	31	9
	60%	56%	71%	58%	66%	61%	57%	63%	55%
Part-time	34	17	13	21	11	26	5	20	9
	43%	39%	59%	40%	48%	44%	39%	40%	56%
Temporary	25	13	5	16	8	17	4	17	3
	32%	30%	25%	31%	33%	29%	29%	34%	21%
Permanent	15	7	5	10	5	11	2	8	5
	19%	17%	24%	19%	21%	18%	15%	16%	32%

QES Q2 2014

Q4 Were the jobs...

Base: All who have tried to recruit in past three months

	Manufacturing					Services					
	Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	117	13	7	-	1	21	55	38	1	2	96
Weighted Total	80	10	2	-	*	13	53	13	*	1	67
	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Full-time	48	6	2	-	*	9	28	10	*	1	39
	60%	61%	85%	-	100%	67%	52%	81%	100%	100%	58%
Part-time	34	6	1	-	*	7	23	3	-	*	27
	43%	61%	28%	-	100%	56%	44%	24%	-	50%	40%
Temporary	25	3	*	-	-	3	18	3	*	1	22
	32%	29%	15%	-	-	25%	34%	24%	100%	100%	33%
Permanent	15	2	*	-	-	3	9	3	*	*	13
	19%	22%	13%	-	-	20%	17%	23%	100%	50%	19%

QES Q2 2014

Q5 Did you meet any difficulties in recruiting?

Base: All who have tried to recruit in past three months

	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	117	41	76	21	96	79	38	58	47	12	117	-	59	58	30	84	3
Weighted Total	80	49	31	13	67	54	26	39	34	8	80	-	38	42	19	58	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Yes	39	25	14	8	31	23	15	18	17	3	39	-	18	21	14	23	1
	48%	51%	44%	59%	46%	43%	60%	48%	50%	45%	48%	-	47%	49%	74%	39%	54%
No	41	24	17	5	36	31	10	20	17	4	41	-	20	21	5	35	1
	52%	49%	56%	41%	54%	57%	40%	52%	50%	55%	52%	-	53%	51%	26%	61%	46%

QES Q2 2014

Q5 Did you meet any difficulties in recruiting?

Base: All who have tried to recruit in past three months

	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	117	67	30	74	35	85	23	75	24
Weighted Total	80	44	21	52	23	60	14	49	15
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	39	23	8	27	9	31	4	22	8
	48%	52%	39%	52%	40%	51%	33%	45%	54%
No	41	21	13	25	14	29	9	27	7
	52%	48%	61%	48%	60%	49%	67%	55%	46%

QES Q2 2014

Q5 Did you meet any difficulties in recruiting?

Base: All who have tried to recruit in past three months

	Manufacturing					Services					
	Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	117	13	7	-	1	21	55	38	1	2	96
Weighted Total	80	10	2	-	*	13	53	13	*	1	67
	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Yes	39	6	1	-	-	8	25	6	-	*	31
	48%	62%	56%	-	-	59%	46%	46%	-	50%	46%
No	41	4	1	-	*	5	29	7	*	*	36
	52%	38%	44%	-	100%	41%	54%	54%	100%	50%	54%

QES Q2 2014

Q6 In which category did you have difficulties?

Base: All who had difficulties in recruiting

	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	54	21	33	11	43	30	24	29	19	6	54	-	26	28	20	32	2
Weighted Total	39	25	14	8	31	23	15	18	17	3	39	-	18	21	14	23	1
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Professional/ managerial	19	11	8	4	15	11	7	11	5	3	19	-	8	11	10	9	-
	48%	43%	58%	50%	48%	49%	47%	57%	30%	86%	48%	-	44%	52%	68%	38%	-
Skilled manual/ technical	16	11	5	3	13	12	4	6	10	*	16	-	9	7	2	14	*
	41%	43%	38%	38%	42%	50%	27%	32%	57%	14%	41%	-	52%	32%	14%	59%	16%
Un/ semi-skilled	7	6	1	3	4	3	4	4	2	*	7	-	1	6	3	3	1
	18%	24%	8%	35%	14%	13%	26%	23%	14%	9%	18%	-	7%	28%	19%	14%	84%
Clerical	4	-	4	*	3	1	3	2	1	-	4	-	2	2	1	2	-
	9%	-	26%	4%	10%	4%	17%	12%	8%	-	9%	-	10%	8%	7%	11%	-

QES Q2 2014

Q6 In which category did you have difficulties?

Base: All who had difficulties in recruiting

	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	54	34	12	37	13	40	9	33	12
Weighted Total	39	23	8	27	9	31	4	22	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%
Professional/ managerial	19	14	3	12	5	14	2	10	4
	48%	60%	37%	44%	57%	45%	54%	47%	45%
Skilled manual/ technical	16	5	6	11	4	11	2	11	4
	41%	21%	77%	39%	49%	36%	46%	48%	44%
Un/ semi-skilled	7	4	2	7	*	6	1	4	*
	18%	19%	18%	25%	4%	18%	27%	19%	4%
Clerical	4	2	1	3	*	3	1	1	2
	9%	7%	13%	10%	3%	10%	12%	6%	24%

QES Q2 2014

Q6 In which category did you have difficulties?

Base: All who had difficulties in recruiting

	Manufacturing					Services					
	Total	1-19	20-199	200-499	500+	Total	1-19	20-199	200-499	500+	Total
Unweighted Total	54	7	4	-	-	11	25	17	-	1	43
Weighted Total	39	6	1	-	-	8	25	6	-	*	31
	100%	100%	100%	-	-	100%	100%	100%	-	100%	100%
Professional/ managerial	19	3	1	-	-	4	12	2	-	-	15
	48%	44%	77%	-	-	50%	50%	42%	-	-	48%
Skilled manual/ technical	16	3	-	-	-	3	9	3	-	*	13
	41%	46%	-	-	-	38%	38%	53%	-	100%	42%
Un/ semi-skilled	7	2	*	-	-	3	4	*	-	*	4
	18%	37%	23%	-	-	35%	15%	6%	-	100%	14%
Clerical	4	-	*	-	-	*	2	1	-	-	3
	9%	-	23%	-	-	4%	9%	18%	-	-	10%

QES Q2 2014

Q7 How have your investment plans changed over the past three months?

Summary table

Base: All respondents

	Total	Increased	Same	Decreased	Mean score
Training	506 100%	68 13%	394 78%	44 9%	.05
Plant and equipment	506 100%	59 12%	402 79%	45 9%	.03

QES Q2 2014

Q7 How have your investment plans changed over the past three months?

Plant and equipment

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%	
Increased	(1.0)	59	50	9	17	42	37	22	24	35	-	15	44	24	35	15	43	1
		12%	11%	17%	19%	10%	13%	10%	30%	9%	-	18%	10%	14%	10%	15%	11%	7%
Same	(0.0)	402	359	42	67	335	218	183	54	329	19	61	340	141	261	74	318	10
		79%	79%	79%	73%	81%	78%	82%	68%	83%	63%	77%	80%	80%	79%	75%	81%	63%
Decreased	(-1.0)	45	43	2	7	38	26	19	1	33	11	4	42	11	34	9	31	5
		9%	9%	4%	8%	9%	9%	8%	2%	8%	37%	5%	10%	6%	10%	9%	8%	30%
Mean Score		.03	.02	.12	.11	.01	.04	.01	.29	.01	-.37	.14	.01	.07	*	.06	.03	-.22

QES Q2 2014

Q7 How have your investment plans changed over the past three months?

Plant and equipment

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%	
Increased	(1.0)	59	33	18	41	17	48	7	30	17
		12%	12%	12%	14%	9%	13%	7%	11%	11%
Same	(0.0)	402	216	116	223	151	302	83	225	119
		79%	79%	77%	77%	82%	79%	85%	81%	79%
Decreased	(-1.0)	45	24	16	26	17	34	8	24	16
		9%	9%	10%	9%	9%	9%	8%	8%	10%
Mean Score		.03	.03	.02	.05	*	.04	-.01	.02	.01

QES Q2 2014

Q7 How have your investment plans changed over the past three months?

Plant and equipment

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Increased	(1.0)	59	17	*	-	17	39	3	-	*	42	
		12%	19%	13%	-	19%	10%	15%	-	20%	10%	
Same	(0.0)	402	64	2	-	* 67	317	16	1	1	335	
		79%	73%	87%	-	100% 73%	81%	81%	100%	80%	81%	
Decreased	(-1.0)	45	7	-	-	7	37	1	-	-	38	
		9%	8%	-	-	8%	10%	4%	-	-	9%	
Mean Score		.03	.11	.13	-	-	.11	*	.10	-	.20	.01

QES Q2 2014

Q7 How have your investment plans changed over the past three months?

Training

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%	
Increased	(1.0)	68	51	17	14	54	47	21	32	34	2	25	43	32	36	19	49	-
		13%	11%	31%	15%	13%	17%	10%	41%	9%	5%	32%	10%	18%	11%	20%	12%	-
Same	(0.0)	394	362	33	70	324	209	185	44	336	13	47	347	133	261	64	322	9
		78%	80%	61%	77%	78%	74%	83%	56%	85%	45%	59%	81%	75%	79%	65%	82%	53%
Decreased	(-1.0)	44	39	4	7	36	26	18	2	26	15	7	36	11	32	14	22	8
		9%	9%	8%	8%	9%	9%	8%	3%	7%	50%	9%	9%	6%	10%	15%	6%	47%
Mean Score		.05	.03	.23	.07	.04	.07	.02	.38	.02	-.45	.23	.01	.12	.01	.05	.07	-.47

QES Q2 2014

Q7 How have your investment plans changed over the past three months?

Training

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%	
Increased	(1.0)	68	48	12	43	24	57	8	45	16
		13%	18%	8%	15%	13%	15%	9%	16%	11%
Same	(0.0)	394	202	123	223	145	294	83	212	122
		78%	74%	82%	77%	78%	77%	85%	76%	81%
Decreased	(-1.0)	44	23	15	24	16	33	7	21	13
		9%	8%	10%	8%	9%	9%	7%	8%	9%
Mean Score		.05	.09	-.02	.07	.04	.06	.02	.09	.02

QES Q2 2014

Q7 How have your investment plans changed over the past three months?

Training

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Increased	(1.0)	68	13	1	-	-	14	48	5	1	*	54
		13%	15%	24%	-	-	15%	12%	28%	100%	20%	13%
Same	(0.0)	394	68	2	-	*	70	311	12	-	1	324
		78%	77%	65%	-	100%	77%	79%	65%	-	80%	78%
Decreased	(-1.0)	44	7	*	-	-	7	35	1	-	-	36
		9%	8%	11%	-	-	8%	9%	6%	-	-	9%
Mean Score		.05	.07	.13	-	-	.07	.03	.22	1.00	.20	.04

QES Q2 2014

Q8 Over the next twelve months what do you think will happen to your...

Summary table

Base: All respondents

	Total	Increase	Stay the same	Decrease	Mean score
Turnover	506 100%	238 47%	190 38%	77 15%	.32
Profitability	506 100%	213 42%	212 42%	82 16%	.26

QES Q2 2014

Q8 Over the next twelve months what do you think will happen to your...

Turnover

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%	
Increase	(1.0)	238	204	34	56	183	141	98	69	168	2	57	181	91	147	58	176	5
		47%	45%	64%	61%	44%	50%	44%	88%	42%	5%	72%	42%	52%	45%	59%	45%	30%
Stay the same	(0.0)	190	177	14	29	161	94	96	9	172	10	17	173	70	120	30	159	1
		38%	39%	26%	32%	39%	33%	43%	11%	43%	34%	22%	41%	40%	36%	31%	40%	7%
Decrease	(-1.0)	77	72	6	6	71	47	30	1	58	19	5	72	15	62	9	58	10
		15%	16%	11%	7%	17%	17%	14%	2%	15%	61%	7%	17%	8%	19%	9%	15%	63%
Mean Score		.32	.29	.53	.55	.27	.33	.30	.86	.28	-.56	.65	.26	.43	.26	.50	.30	-.33

QES Q2 2014

Q8 Over the next twelve months what do you think will happen to your...

Turnover

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%	
Increase	(1.0)	238	128	70	144	82	185	38	144	60
		47%	47%	47%	50%	44%	48%	39%	52%	40%
Stay the same	(0.0)	190	106	55	102	74	136	47	100	61
		38%	39%	37%	35%	40%	35%	47%	36%	41%
Decrease	(-1.0)	77	38	24	44	29	63	13	35	29
		15%	14%	16%	15%	16%	16%	14%	13%	19%
Mean Score		.32	.33	.30	.35	.29	.32	.25	.39	.20

QES Q2 2014

Q8 Over the next twelve months what do you think will happen to your...

Turnover

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Increase	(1.0)	238	53	2	-	*	56	169	12	1	1	183
		47%	61%	76%	-	100%	61%	43%	62%	100%	60%	44%
Stay the same	(0.0)	190	29	1	-	-	29	156	5	-	1	161
		38%	33%	24%	-	-	32%	40%	25%	-	40%	39%
Decrease	(-1.0)	77	6	-	-	-	6	69	2	-	-	71
		15%	7%	-	-	-	7%	17%	13%	-	-	17%
Mean Score		.32	.54	.76	-	1.00	.55	.25	.49	1.00	.60	.27

QES Q2 2014

Q8 Over the next twelve months what do you think will happen to your...

Profitability

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%	
Increase	(1.0)	213	184	29	45	167	130	83	60	151	1	51	162	90	122	57	152	4
		42%	41%	54%	50%	40%	46%	37%	76%	38%	5%	64%	38%	51%	37%	58%	39%	22%
Stay the same	(0.0)	212	195	17	40	171	103	108	17	182	12	22	190	69	143	31	177	4
		42%	43%	32%	44%	41%	37%	48%	22%	46%	41%	27%	45%	39%	43%	32%	45%	25%
Decrease	(-1.0)	82	74	8	5	76	48	33	1	64	16	7	74	17	64	10	63	9
		16%	16%	14%	6%	18%	17%	15%	2%	16%	54%	9%	17%	10%	20%	10%	16%	53%
Mean Score		.26	.24	.40	.44	.22	.29	.22	.75	.22	-.50	.55	.21	.41	.18	.48	.23	-.31

QES Q2 2014

Q8 Over the next twelve months what do you think will happen to your...

Profitability

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%	
Increase	(1.0)	213	118	59	129	74	164	38	122	58
		42%	43%	39%	45%	40%	43%	39%	44%	38%
Stay the same	(0.0)	212	114	63	117	81	153	47	119	64
		42%	42%	42%	40%	44%	40%	47%	43%	42%
Decrease	(-1.0)	82	40	28	43	30	66	14	38	30
		16%	15%	19%	15%	16%	17%	14%	14%	20%
Mean Score		.26	.29	.21	.30	.24	.26	.24	.30	.18

QES Q2 2014

Q8 Over the next twelve months what do you think will happen to your...

Profitability

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Increase	(1.0)	213	43	2	-	*	45	156	11	*	1	167
		42%	49%	62%	-	100%	50%	40%	55%	39%	60%	40%
Stay the same	(0.0)	212	40	1	-	-	40	163	7	*	*	171
		42%	45%	27%	-	-	44%	42%	37%	61%	20%	41%
Decrease	(-1.0)	82	5	*	-	-	5	75	1	-	*	76
		16%	5%	11%	-	-	6%	19%	8%	-	20%	18%
Mean Score		.26	.44	.51	-	1.00	.44	.21	.47	.39	.40	.22

QES Q2 2014

Q9 Are you operating at...

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%
Full capacity	177	152	25	38	138	94	82	35	135	7	38	138	177	-	37	137	2
	35%	34%	47%	42%	33%	33%	37%	44%	34%	22%	48%	32%	100%	-	38%	35%	15%
Below full capacity	329	301	29	53	277	188	142	44	262	24	42	288	-	329	60	255	14
	65%	66%	53%	58%	67%	67%	63%	56%	66%	78%	52%	68%	-	100%	62%	65%	85%

QES Q2 2014

Q9 Are you operating at...

Base: All respondents

	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%
Full capacity	177	99	48	98	70	133	31	102	51
	35%	36%	32%	34%	38%	35%	31%	37%	33%
Below full capacity	329	173	102	192	115	250	68	176	101
	65%	64%	68%	66%	62%	65%	69%	63%	67%

QES Q2 2014

Q9 Are you operating at...

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%
Full capacity	177	37	1	-	*	38	128	10	1	*	138
	35%	42%	27%	-	100%	42%	32%	50%	100%	20%	33%
Below full capacity	329	51	2	-	-	53	266	10	-	1	277
	65%	58%	73%	-	-	58%	68%	50%	-	80%	67%

QES Q2 2014

Q10 Over the next three months do you expect the price of your goods/ services to:

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%
Rise	(1.0)	98	84	14	31	67	56	41	22	66	10	19	78	37	60	98	-
		19%	18%	26%	34%	16%	20%	18%	27%	17%	32%	24%	18%	21%	18%	100%	-
Stay the same	(0.0)	392	353	39	59	333	216	177	56	319	17	58	334	137	255	-	392
		78%	78%	73%	65%	80%	77%	79%	71%	80%	58%	72%	78%	78%	78%	-	100%
Fall	(-1.0)	16	16	1	1	15	10	6	1	12	3	3	14	2	14	-	-
		3%	3%	1%	1%	4%	4%	3%	2%	3%	10%	3%	3%	1%	4%	-	100%
Mean Score		.16	.15	.25	.32	.13	.16	.16	.26	.14	.22	.21	.15	.20	.14	1.00	-

QES Q2 2014

Q10 Over the next three months do you expect the price of your goods/ services to:

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%	
Rise	(1.0)	98	62	27	59	35	75	19	51	31
		19%	23%	18%	20%	19%	19%	19%	18%	21%
Stay the same	(0.0)	392	204	115	219	146	297	76	217	116
		78%	75%	77%	76%	79%	77%	77%	78%	77%
Fall	(-1.0)	16	6	8	11	4	12	4	10	4
		3%	2%	5%	4%	2%	3%	4%	4%	2%
Mean Score		.16	.20	.13	.17	.17	.16	.15	.15	.18

QES Q2 2014

Q10 Over the next three months do you expect the price of your goods/ services to:

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Rise	(1.0)	98	29	1	-	*	31	63	4	-	*	67
		19%	33%	40%	-	100%	34%	16%	21%	-	20%	16%
Stay the same	(0.0)	392	57	2	-	-	59	317	14	1	1	333
		78%	66%	60%	-	-	65%	80%	75%	100%	80%	80%
Fall	(-1.0)	16	1	-	-	-	1	14	1	-	-	15
		3%	1%	-	-	-	1%	4%	3%	-	-	4%
Mean Score		.16	.32	.40	-	1.00	.32	.12	.18	-	.20	.13

QES Q2 2014

Q11 Is your business under any pressure to raise prices from any of the following?

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%
Finance costs	81	66	16	19	62	47	34	16	56	9	17	64	34	48	26	51	4
	16%	15%	29%	21%	15%	17%	15%	20%	14%	30%	22%	15%	19%	14%	27%	13%	22%
Raw material prices	77	66	12	28	49	32	45	13	59	5	16	61	25	52	31	45	1
	15%	15%	22%	31%	12%	12%	20%	17%	15%	15%	21%	14%	14%	16%	32%	11%	9%
Pay settlements	42	33	9	6	36	22	20	11	27	4	13	29	16	26	9	31	2
	8%	7%	16%	7%	9%	8%	9%	14%	7%	12%	16%	7%	9%	8%	9%	8%	15%
Other overheads	210	192	18	33	177	117	93	37	161	12	32	178	74	136	39	163	8
	42%	42%	34%	36%	43%	42%	41%	47%	41%	39%	40%	42%	42%	41%	40%	41%	52%
Not Stated	188	172	16	29	159	106	81	21	156	10	21	167	63	124	25	158	5
	37%	38%	29%	31%	38%	38%	36%	26%	39%	35%	26%	39%	36%	38%	25%	40%	32%

QES Q2 2014

Q11 Is your business under any pressure to raise prices from any of the following?

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%
Finance costs	81	51	20	55	25	62	14	47	26
	16%	19%	13%	19%	14%	16%	14%	17%	17%
Raw material prices	77	41	25	42	30	57	17	43	27
	15%	15%	17%	14%	17%	15%	18%	15%	18%
Pay settlements	42	21	11	27	14	30	11	27	11
	8%	8%	7%	9%	7%	8%	11%	10%	7%
Other overheads	210	110	59	114	84	154	46	119	60
	42%	41%	39%	39%	45%	40%	47%	43%	40%
Not Stated	188	102	57	109	64	147	33	95	58
	37%	38%	38%	38%	35%	38%	33%	34%	38%

QES Q2 2014

Q11 Is your business under any pressure to raise prices from any of the following?

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%
Finance costs	81	18	1	-	-	19	57	5	1	-	62
	16%	21%	24%	-	-	21%	14%	24%	100%	-	15%
Raw material prices	77	27	1	-	*	28	45	4	1	-	49
	15%	31%	27%	-	100%	31%	11%	19%	100%	-	12%
Pay settlements	42	5	*	-	*	6	32	3	-	*	36
	8%	6%	13%	-	100%	7%	8%	17%	-	20%	9%
Other overheads	210	32	1	-	-	33	169	8	-	*	177
	42%	36%	38%	-	-	36%	43%	40%	-	20%	43%
Not Stated	188	28	1	-	-	29	154	4	-	1	159
	37%	32%	24%	-	-	31%	39%	22%	-	60%	38%

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Summary table

Base: All respondents

	Total					Nets		Mean score	
		Increased significantly	Increased slightly	Stayed the same	Decreased slightly	Decreased significantly	Increased		Decreased
Cost of my business's energy	506 100%	37 7%	200 40%	259 51%	8 1%	2 *	237 47%	10 2%	.52
Cost of fuel	506 100%	26 5%	172 34%	269 53%	38 7%	1 *	198 39%	39 8%	.36
Pressure from employees to increase wages	506 100%	20 4%	118 23%	353 70%	10 2%	4 1%	139 27%	15 3%	.28
Cost of raw materials (sourced domestically)	506 100%	15 3%	117 23%	365 72%	6 1%	3 1%	132 26%	9 2%	.27
Cost of raw materials (sourced internationally)	506 100%	16 3%	69 14%	409 81%	10 2%	2 *	85 17%	13 3%	.17
Cost of borrowing	506 100%	21 4%	52 10%	416 82%	11 2%	6 1%	73 14%	17 3%	.14

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Pressure from employees to increase wages

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%	
Increased significantly	(2.0)	20	14	6	3	17	12	8	8	11	2	6	14	9	12	5	13	1
		4%	3%	11%	3%	4%	4%	4%	10%	3%	6%	8%	3%	5%	3%	6%	3%	9%
Increased slightly	(1.0)	118	94	24	26	93	67	51	29	80	10	34	85	43	75	28	85	6
		23%	21%	45%	28%	22%	24%	23%	37%	20%	32%	42%	20%	24%	23%	29%	22%	37%
Stayed the same	(0.0)	353	331	22	61	292	194	158	40	297	16	35	318	121	232	60	285	8
		70%	73%	41%	67%	70%	69%	71%	51%	75%	54%	44%	75%	69%	70%	61%	73%	47%
Decreased slightly	(-1.0)	10	10	1	-	10	7	4	2	7	1	4	6	3	7	3	6	1
		2%	2%	2%	-	3%	2%	2%	3%	2%	4%	5%	1%	2%	2%	3%	2%	7%
Decreased significantly	(-2.0)	4	4	1	1	3	1	4	-	3	1	1	4	1	4	1	3	-
		1%	1%	1%	1%	1%	*	2%	-	1%	4%	1%	1%	*	1%	1%	-	
Nets																		
Increased		139	109	30	29	110	80	59	37	91	11	40	99	52	87	33	98	7
		27%	24%	56%	32%	27%	28%	26%	46%	23%	38%	50%	23%	29%	26%	34%	25%	46%
Decreased		15	13	1	1	13	7	7	2	10	2	5	10	4	11	4	9	1
		3%	3%	3%	1%	3%	3%	3%	3%	2%	8%	6%	2%	2%	3%	4%	2%	7%
Mean Score		.28	.23	.64	.32	.27	.30	.25	.53	.22	.32	.51	.23	.32	.26	.34	.25	.47

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Pressure from employees to increase wages

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%	
Increased significantly	(2.0)	20	11	9	12	9	13	6	16	2
	4%	4%	6%	4%	5%	3%	7%	6%	2%	
Increased slightly	(1.0)	118	68	35	82	27	100	15	69	36
	23%	25%	23%	28%	14%	26%	15%	25%	24%	
Stayed the same	(0.0)	353	186	104	188	145	259	75	185	111
	70%	68%	70%	65%	78%	68%	77%	67%	73%	
Decreased slightly	(-1.0)	10	6	2	6	3	9	2	4	2
	2%	2%	2%	2%	2%	2%	2%	1%	1%	
Decreased significantly	(-2.0)	4	2	-	3	1	3	-	4	-
	1%	1%	-	1%	1%	1%	-	1%	-	
Nets										
Increased	139	79	43	93	35	112	21	85	39	
	27%	29%	29%	32%	19%	29%	22%	31%	26%	
Decreased	15	8	2	9	4	12	2	8	2	
	3%	3%	2%	3%	2%	3%	2%	3%	1%	
Mean Score	.28	.29	.33	.32	.21	.29	.27	.32	.26	

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Pressure from employees to increase wages

Base: All respondents

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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%
Increased significantly	(2.0)	20	3	-	-	3	15	2	*	-	17
	4%	3%	-	-	-	3%	4%	11%	39%	-	4%
Increased slightly	(1.0)	118	24	1	-	* 26	85	8	-	*	93
	23%	27%	47%	-	100%	28%	22%	40%	-	20%	22%
Stayed the same	(0.0)	353	60	2	-	- 61	281	10	-	1	292
	70%	68%	53%	-	-	67%	71%	50%	-	80%	70%
Decreased slightly	(-1.0)	10	-	-	-	-	10	-	*	-	10
	2%	-	-	-	-	-	3%	-	61%	-	3%
Decreased significantly	(-2.0)	4	1	-	-	- 1	3	-	-	-	3
	1%	1%	-	-	-	1%	1%	-	-	-	1%
Nets											
Increased	139	27	1	-	*	29	100	10	*	*	110
	27%	31%	47%	-	100%	32%	25%	50%	39%	20%	27%
Decreased	15	1	-	-	-	1	13	-	*	-	13
	3%	1%	-	-	-	1%	3%	-	61%	-	3%
Mean Score	.28	.31	.47	-	1.00	.32	.25	.61	.18	.20	.27

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of borrowing

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%	
Increased significantly	(2.0)	21	19	2	4	17	13	8	2	12	6	4	17	6	15	9	11	1
		4%	4%	3%	4%	4%	5%	3%	3%	20%	5%	4%	4%	4%	9%	3%	7%	
Increased slightly	(1.0)	52	43	9	13	39	28	25	11	39	2	14	38	19	33	11	40	1
		10%	9%	17%	15%	9%	10%	11%	14%	10%	8%	17%	9%	11%	10%	11%	10%	9%
Stayed the same	(0.0)	416	376	40	68	347	231	184	64	333	19	60	356	144	272	75	330	11
		82%	83%	74%	75%	84%	82%	82%	81%	84%	64%	74%	84%	81%	82%	77%	84%	69%
Decreased slightly	(-1.0)	11	10	1	5	6	4	7	1	8	2	1	10	5	6	2	8	1
		2%	2%	3%	5%	2%	2%	3%	1%	2%	5%	2%	2%	3%	2%	2%	2%	7%
Decreased significantly	(-2.0)	6	5	1	1	5	5	1	1	4	1	1	5	2	4	1	4	1
		1%	1%	3%	1%	1%	2%	1%	1%	1%	4%	1%	1%	1%	1%	1%	1%	7%
Nets																		
Increased		73	62	11	17	56	41	32	14	51	8	18	55	26	48	20	51	3
		14%	14%	21%	19%	14%	14%	14%	17%	13%	27%	23%	13%	15%	14%	20%	13%	16%
Decreased		17	14	3	6	11	9	8	2	13	3	2	15	7	10	3	12	2
		3%	3%	5%	6%	3%	3%	3%	2%	3%	9%	3%	3%	4%	3%	3%	3%	15%
Mean Score		.14	.14	.16	.15	.14	.14	.14	.18	.12	.34	.24	.12	.13	.14	.25	.12	.01

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of borrowing

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%	
Increased significantly	(2.0)	21	11	9	12	8	13	7	13	5
		4%	4%	6%	4%	4%	3%	7%	5%	4%
Increased slightly	(1.0)	52	29	11	25	25	35	13	33	17
		10%	10%	7%	9%	14%	9%	13%	12%	11%
Stayed the same	(0.0)	416	222	124	242	145	325	75	223	124
		82%	82%	83%	84%	79%	85%	76%	80%	82%
Decreased slightly	(-1.0)	11	8	3	7	4	7	2	6	2
		2%	3%	2%	3%	2%	2%	2%	2%	2%
Decreased significantly	(-2.0)	6	3	3	3	3	4	2	3	2
		1%	1%	2%	1%	2%	1%	2%	1%	2%
Nets										
Increased		73	39	20	37	33	48	20	46	22
		14%	14%	13%	13%	18%	12%	20%	16%	15%
Decreased		17	11	6	11	7	11	3	9	5
		3%	4%	4%	4%	4%	3%	3%	3%	3%
Mean Score		.14	.13	.13	.12	.17	.12	.22	.17	.14

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of borrowing

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Increased significantly	(2.0)	21	4	-	-	4	17	*	-	-	17	
		4%	4%	-	-	4%	4%	1%	-	-	4%	
Increased slightly	(1.0)	52	13	*	-	13	34	5	-	-	39	
		10%	15%	11%	-	15%	9%	25%	-	-	9%	
Stayed the same	(0.0)	416	65	3	-	* 68	332	14	1	2	347	
		82%	74%	89%	-	100% 75%	84%	71%	100%	100%	84%	
Decreased slightly	(-1.0)	11	5	-	-	5	6	*	-	-	6	
		2%	5%	-	-	5%	2%	2%	-	-	2%	
Decreased significantly	(-2.0)	6	1	-	-	1	5	*	-	-	5	
		1%	1%	-	-	1%	1%	2%	-	-	1%	
Nets												
Increased		73	17	*	-	-	17	51	5	-	-	56
		14%	19%	11%	-	-	19%	13%	26%	-	-	14%
Decreased		17	6	-	-	-	6	11	1	-	-	11
		3%	7%	-	-	-	6%	3%	4%	-	-	3%
Mean Score		.14	.15	.11	-	-	.15	.14	.21	-	-	.14

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of my business's energy

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%	
Increased significantly	(2.0)	37	33	3	6	30	16	20	5	26	5	4	33	9	28	5	28	4
		7%	7%	6%	7%	7%	6%	9%	6%	7%	17%	5%	8%	5%	9%	5%	7%	22%
Increased slightly	(1.0)	200	177	23	36	164	116	84	30	158	12	33	167	76	124	45	150	5
		40%	39%	44%	40%	39%	41%	38%	38%	40%	38%	42%	39%	43%	38%	46%	38%	31%
Stayed the same	(0.0)	259	234	25	45	215	144	115	42	207	10	41	218	90	169	44	209	6
		51%	52%	47%	49%	52%	51%	51%	53%	52%	35%	52%	51%	51%	51%	45%	53%	37%
Decreased slightly	(-1.0)	8	6	2	2	5	4	4	2	4	2	2	6	2	5	2	5	*
		1%	1%	3%	3%	1%	1%	2%	2%	1%	6%	2%	1%	1%	2%	2%	1%	2%
Decreased significantly	(-2.0)	2	2	-	1	1	1	1	-	1	1	-	2	-	2	1	-	1
		*	1%	-	1%	*	*	1%	-	*	4%	-	1%	-	1%	-	-	7%
Nets																		
Increased		237	210	27	43	194	132	105	35	185	17	37	200	84	153	51	178	9
		47%	46%	50%	47%	47%	47%	47%	45%	47%	55%	47%	47%	48%	46%	52%	45%	53%
Decreased		10	8	2	4	6	5	5	2	5	3	2	8	2	8	3	5	2
		2%	2%	3%	4%	2%	2%	2%	2%	1%	10%	2%	2%	1%	2%	3%	1%	10%
Mean Score		.52	.51	.53	.49	.52	.50	.53	.50	.52	.58	.49	.52	.51	.52	.53	.51	.58

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of my business's energy

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%
Increased significantly (2.0)	37 7%	19 7%	12 8%	20 7%	12 7%	24 6%	9 9%	25 9%	8 5%
Increased slightly (1.0)	200 40%	97 35%	65 43%	113 39%	82 44%	156 41%	40 41%	112 40%	63 42%
Stayed the same (0.0)	259 51%	151 55%	70 47%	150 52%	87 47%	194 51%	49 50%	134 48%	80 53%
Decreased slightly (-1.0)	8 1%	4 2%	2 1%	5 2%	3 1%	7 2%	* *	5 2%	1 *
Decreased significantly (-2.0)	2 *	1 *	1 1%	1 *	1 1%	2 1%	- -	2 1%	- -
Nets									
Increased	237 47%	116 43%	77 51%	133 46%	94 51%	179 47%	49 50%	137 49%	71 47%
Decreased	10 2%	6 2%	3 2%	6 2%	4 2%	10 3%	* *	7 2%	1 *
Mean Score	.52	.47	.56	.51	.55	.50	.58	.55	.51

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of my business's energy

Base: All respondents

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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%
Increased significantly	(2.0)	37	6	*	-	6	30	*	-	*	30
		7%	7%	11%	-	7%	8%	2%	-	20%	7%
Increased slightly	(1.0)	200	35	1	-	36	155	8	*	1	164
		40%	40%	35%	-	40%	39%	42%	39%	40%	39%
Stayed the same	(0.0)	259	43	2	-	* 45	205	9	-	1	215
		51%	49%	53%	-	100% 49%	52%	49%	-	40%	52%
Decreased slightly	(-1.0)	8	2	-	-	2	4	1	*	-	5
		1%	3%	-	-	3%	1%	7%	61%	-	1%
Decreased significantly	(-2.0)	2	1	-	-	1	1	-	-	-	1
		*	1%	-	-	1%	*	-	-	-	*
Nets											
Increased		237	41	1	-	- 43	184	9	*	1	194
		47%	47%	47%	-	47%	47%	45%	39%	60%	47%
Decreased		10	4	-	-	4	5	1	*	-	6
		2%	4%	-	-	4%	1%	7%	61%	-	2%
Mean Score		.52	.49	.58	-	-.49	.53	.41	-.21	.80	.52

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of fuel

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%	
Increased significantly	(2.0)	26	23	4	4	22	11	16	6	16	5	3	23	6	21	5	19	3
		5%	5%	7%	5%	5%	4%	7%	7%	4%	17%	4%	6%	3%	6%	5%	5%	16%
Increased slightly	(1.0)	172	156	15	37	134	87	84	23	139	9	26	145	58	114	38	129	5
		34%	35%	29%	41%	32%	31%	38%	30%	35%	30%	33%	34%	33%	35%	39%	33%	30%
Stayed the same	(0.0)	269	239	30	45	224	164	104	43	214	12	42	226	103	166	48	215	6
		53%	53%	56%	49%	54%	58%	46%	54%	54%	41%	53%	53%	58%	50%	49%	55%	37%
Decreased slightly	(-1.0)	38	33	5	5	33	18	20	7	28	3	8	30	10	28	7	30	2
		7%	7%	8%	6%	8%	6%	9%	9%	7%	9%	10%	7%	6%	8%	7%	8%	10%
Decreased significantly	(-2.0)	1	1	*	-	1	1	-	*	-	1	*	1	-	1	-	*	1
		*	*	*	-	*	1%	-	*	-	4%	*	*	-	*	-	*	7%
Nets																		
Increased		198	179	19	41	157	98	100	29	155	14	29	169	63	135	43	148	7
		39%	40%	35%	45%	38%	35%	44%	37%	39%	46%	37%	40%	36%	41%	44%	38%	46%
Decreased		39	35	5	5	34	19	20	7	28	4	8	31	10	29	7	30	3
		8%	8%	9%	6%	8%	7%	9%	9%	7%	13%	10%	7%	6%	9%	7%	8%	17%
Mean Score		.36	.37	.33	.44	.34	.31	.42	.34	.36	.46	.30	.37	.33	.38	.42	.35	.38

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of fuel

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%	
Increased significantly	(2.0)	26	13	9	18	6	20	4	17	8
		5%	5%	6%	6%	3%	5%	4%	6%	5%
Increased slightly	(1.0)	172	86	51	85	76	127	35	93	57
		34%	32%	34%	29%	41%	33%	36%	33%	38%
Stayed the same	(0.0)	269	154	73	157	93	202	54	143	75
		53%	56%	49%	54%	50%	53%	55%	52%	50%
Decreased slightly	(-1.0)	38	19	15	30	8	33	5	24	12
		7%	7%	10%	10%	4%	9%	5%	9%	8%
Decreased significantly	(-2.0)	1	*	1	*	1	1	-	1	-
		*	*	1%	*	1%	*	-	1%	-
Nets										
Increased	198	99	60	103	83	147	39	110	64	
	39%	36%	40%	36%	45%	38%	40%	39%	43%	
Decreased	39	19	16	30	9	34	5	25	12	
	8%	7%	11%	10%	5%	9%	5%	9%	8%	
Mean Score	.36	.34	.34	.31	.43	.34	.40	.36	.40	

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of fuel

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Increased significantly	(2.0)	26	4	-	-	4	21	1	-	*	22	
		5%	5%	-	-	5%	5%	3%	-	20%	5%	
Increased slightly	(1.0)	172	36	1	-	37	128	5	1	1	134	
		34%	41%	35%	-	41%	32%	29%	100%	40%	32%	
Stayed the same	(0.0)	269	43	2	-	45	213	11	-	1	224	
		53%	49%	65%	-	49%	54%	56%	-	40%	54%	
Decreased slightly	(-1.0)	38	5	-	-	5	31	2	-	-	33	
		7%	5%	-	-	6%	8%	11%	-	-	8%	
Decreased significantly	(-2.0)	1	-	-	-	-	1	*	-	-	1	
		*	-	-	-	-	*	1%	-	-	*	
Nets												
Increased		198	40	1	-	41	149	6	1	1	157	
		39%	46%	35%	-	45%	38%	32%	100%	60%	38%	
Decreased		39	5	-	-	5	32	2	-	-	34	
		8%	5%	-	-	6%	8%	12%	-	-	8%	
Mean Score		.36	.45	.35	-	-1.00	.44	.35	.22	1.00	.80	.34

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced domestically)

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%	
Increased significantly	(2.0)	15	13	2	4	11	7	8	2	10	3	1	14	4	11	8	7	-
		3%	3%	3%	4%	3%	3%	3%	2%	3%	10%	2%	3%	2%	3%	8%	2%	-
Increased slightly	(1.0)	117	103	14	34	83	61	56	26	85	6	24	93	44	73	31	83	3
		23%	23%	27%	37%	20%	22%	25%	33%	21%	20%	30%	22%	25%	22%	32%	21%	16%
Stayed the same	(0.0)	365	329	36	51	314	211	155	48	298	20	52	313	126	240	57	295	14
		72%	73%	67%	56%	76%	75%	69%	61%	75%	65%	66%	73%	71%	73%	59%	75%	84%
Decreased slightly	(-1.0)	6	5	1	2	4	2	4	3	3	*	2	4	2	4	1	5	-
		1%	1%	2%	3%	1%	1%	2%	4%	1%	1%	2%	1%	1%	1%	1%	1%	-
Decreased significantly	(-2.0)	3	2	*	-	3	*	2	-	1	1	-	3	1	1	-	3	-
		1%	1%	*	-	1%	*	1%	-	*	4%	-	1%	1%	*	-	1%	-
Nets																		
Increased		132	116	16	37	94	68	64	28	95	9	26	106	48	84	39	90	3
		26%	26%	30%	41%	23%	24%	28%	35%	24%	30%	32%	25%	27%	26%	40%	23%	16%
Decreased		9	7	2	2	6	3	6	3	4	1	2	7	3	6	1	8	-
		2%	2%	3%	3%	2%	1%	3%	4%	1%	5%	2%	2%	2%	2%	1%	2%	-
Mean Score		.27	.26	.30	.43	.23	.26	.28	.34	.25	.31	.31	.26	.27	.27	.47	.22	.16

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced domestically)

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%	
Increased significantly	(2.0)	15	7	5	6	7	11	3	11	4
	3%	3%	3%	2%	4%	3%	3%	4%	3%	
Increased slightly	(1.0)	117	62	39	68	44	86	25	76	30
	23%	23%	26%	23%	24%	23%	26%	27%	20%	
Stayed the same	(0.0)	365	197	105	209	132	279	69	187	113
	72%	72%	70%	72%	72%	73%	70%	67%	75%	
Decreased slightly	(-1.0)	6	4	1	6	-	6	-	4	2
	1%	1%	*	2%	-	2%	-	2%	1%	
Decreased significantly	(-2.0)	3	3	-	1	1	1	1	-	2
	1%	1%	-	*	1%	*	1%	-	2%	
Nets										
Increased	132	69	44	74	51	97	28	87	34	
	26%	25%	30%	25%	28%	25%	29%	31%	23%	
Decreased	9	6	1	7	1	7	1	4	4	
	2%	2%	*	3%	1%	2%	1%	2%	3%	
Mean Score	.27	.25	.33	.25	.30	.26	.29	.33	.21	

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced domestically)

Base: All respondents

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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%
Increased significantly	(2.0)	15	4	-	-	4	11	*	-	-	11
		3%	4%	-	-	4%	3%	1%	-	-	3%
Increased slightly	(1.0)	117	33	*	-	* 34	79	4	*	*	83
		23%	38%	13%	-	100% 37%	20%	20%	39%	20%	20%
Stayed the same	(0.0)	365	49	2	-	- 51	298	15	*	1	314
		72%	55%	87%	-	- 56%	76%	76%	61%	80%	76%
Decreased slightly	(-1.0)	6	2	-	-	- 2	3	*	-	-	4
		1%	3%	-	-	- 3%	1%	1%	-	-	1%
Decreased significantly	(-2.0)	3	-	-	-	- -	2	*	-	-	3
		1%	-	-	-	- -	1%	1%	-	-	1%
Nets											
Increased		132	37	*	-	* 37	90	4	*	*	94
		26%	42%	13%	-	100% 41%	23%	21%	39%	20%	23%
Decreased		9	2	-	-	- 2	6	*	-	-	6
		2%	3%	-	-	- 3%	1%	2%	-	-	2%
Mean Score		.27	.43	.13	-	1.00 .43	.24	.19	.39	.20	.23

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced internationally)

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%	
Increased significantly	(2.0)	16	13	3	4	12	6	9	3	9	4	3	12	3	12	8	7	1
		3%	3%	5%	4%	3%	2%	4%	3%	2%	12%	4%	3%	2%	4%	8%	2%	7%
Increased slightly	(1.0)	69	55	14	17	52	34	35	15	50	3	15	54	26	43	19	47	3
		14%	12%	26%	19%	12%	12%	16%	19%	13%	11%	19%	13%	15%	13%	19%	12%	16%
Stayed the same	(0.0)	409	372	36	68	341	236	173	57	331	21	59	349	143	266	69	329	11
		81%	82%	68%	75%	82%	84%	77%	72%	83%	68%	74%	82%	81%	81%	70%	84%	69%
Decreased slightly	(-1.0)	10	10	1	2	8	6	5	4	5	1	2	8	3	7	2	7	1
		2%	2%	1%	3%	2%	2%	2%	5%	1%	5%	2%	2%	2%	2%	2%	2%	7%
Decreased significantly	(-2.0)	2	2	-	-	2	-	2	-	1	1	-	2	1	1	-	2	-
		*	1%	-	-	1%	-	1%	-	*	4%	-	1%	1%	*	-	1%	-
Nets																		
Increased		85	68	17	21	64	40	44	18	60	7	18	66	29	55	26	54	4
		17%	15%	31%	23%	15%	14%	20%	23%	15%	23%	23%	16%	17%	17%	27%	14%	24%
Decreased		13	12	1	2	10	6	7	4	6	3	2	11	4	9	2	9	1
		3%	3%	1%	3%	2%	2%	3%	5%	2%	9%	2%	3%	2%	3%	2%	2%	7%
Mean Score		.17	.15	.34	.24	.15	.20	.21	.16	.22	.25	.15	.16	.18	.32	.13	.24	

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced internationally)

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%
Increased significantly (2.0)	16 3%	8 3%	5 3%	9 3%	4 2%	10 3%	5 5%	12 4%	3 2%
Increased slightly (1.0)	69 14%	41 15%	23 15%	30 10%	34 18%	50 13%	16 16%	44 16%	19 13%
Stayed the same (0.0)	409 81%	216 79%	118 79%	242 83%	144 78%	313 82%	75 77%	215 77%	123 82%
Decreased slightly (-1.0)	10 2%	5 2%	4 2%	8 3%	2 1%	9 2%	1 1%	7 3%	3 2%
Decreased significantly (-2.0)	2 *	2 1%	- -	1 *	1 1%	1 *	1 1%	- -	2 2%
Nets									
Increased	85 17%	49 18%	28 19%	39 13%	38 20%	60 16%	21 21%	56 20%	22 15%
Decreased	13 3%	7 3%	4 2%	9 3%	4 2%	10 3%	2 2%	7 3%	5 4%
Mean Score	.17	.17	.19	.13	.20	.15	.22	.22	.12

QES Q2 2014

Q12 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced internationally)

Base: All respondents

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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%
Increased significantly	(2.0)	16	4	-	-	4	12	*	*	-	12
	3%	4%	-	-	-	4%	3%	1%	39%	-	3%
Increased slightly	(1.0)	69	16	1	-	* 17	47	4	*	-	52
	14%	18%	27%	-	100%	19%	12%	23%	61%	-	12%
Stayed the same	(0.0)	409	66	2	-	- 68	325	14	-	2	341
	81%	75%	73%	-	-	75%	83%	74%	-	100%	82%
Decreased slightly	(-1.0)	10	2	-	-	- 2	8	*	-	-	8
	2%	3%	-	-	-	3%	2%	1%	-	-	2%
Decreased significantly	(-2.0)	2	-	-	-	-	2	-	-	-	2
	*	-	-	-	-	-	1%	-	-	-	1%
Nets											
Increased	85	20	1	-	*	21	59	5	1	-	64
	17%	22%	27%	-	100%	23%	15%	25%	100%	-	15%
Decreased	13	2	-	-	-	2	10	*	-	-	10
	3%	3%	-	-	-	3%	3%	1%	-	-	2%
Mean Score	.17	.24	.27	-	1.00	.24	.15	.25	1.39	-	.15

QES Q2 2014

Q13 Which of the following are more of a concern to your business than they were three months ago?

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%
Competition	206	183	23	36	170	110	96	28	163	14	32	174	67	139	46	155	4
	41%	40%	43%	39%	41%	39%	43%	36%	41%	46%	40%	41%	38%	42%	48%	40%	25%
Interest rates	147	131	15	39	107	77	70	27	110	10	26	121	58	88	30	111	6
	29%	29%	29%	43%	26%	27%	31%	34%	28%	33%	32%	28%	33%	27%	30%	28%	37%
Inflation	147	134	13	28	119	80	67	23	112	13	15	131	46	101	25	119	3
	29%	30%	24%	31%	29%	28%	30%	29%	28%	42%	19%	31%	26%	31%	26%	30%	16%
Corporate Taxation	98	87	10	19	78	59	38	24	67	6	19	79	40	58	21	71	6
	19%	19%	19%	21%	19%	21%	17%	31%	17%	21%	23%	18%	22%	18%	21%	18%	37%
Exchange rates	88	74	14	19	69	58	30	18	60	10	16	72	31	57	21	62	5
	17%	16%	26%	21%	17%	20%	14%	22%	15%	34%	20%	17%	17%	17%	21%	16%	30%
Business rates	85	73	12	18	67	44	40	22	57	6	20	65	31	53	19	65	1
	17%	16%	22%	20%	16%	16%	18%	27%	14%	21%	25%	15%	18%	16%	19%	16%	7%
Not Stated	77	73	4	12	65	41	36	11	65	1	14	63	27	49	13	61	2
	15%	16%	7%	13%	16%	14%	16%	14%	16%	4%	17%	15%	15%	15%	13%	16%	15%

QES Q2 2014

Q13 Which of the following are more of a concern to your business than they were three months ago?

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%
Competition	206	104	63	114	80	156	39	111	61
	41%	38%	42%	39%	43%	41%	39%	40%	40%
Interest rates	147	85	43	78	59	112	29	89	43
	29%	31%	29%	27%	32%	29%	30%	32%	28%
Inflation	147	76	50	82	58	109	30	78	48
	29%	28%	33%	28%	31%	29%	31%	28%	32%
Corporate Taxation	98	51	31	61	33	75	16	61	25
	19%	19%	21%	21%	18%	19%	17%	22%	17%
Exchange rates	88	49	27	51	33	68	15	59	22
	17%	18%	18%	18%	18%	18%	15%	21%	15%
Business rates	85	49	21	44	34	69	10	49	22
	17%	18%	14%	15%	19%	18%	10%	18%	14%
Not Stated	77	38	19	50	18	57	15	41	19
	15%	14%	13%	17%	10%	15%	15%	15%	12%

QES Q2 2014

Q13 Which of the following are more of a concern to your business than they were three months ago?

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%
Competition	206	34	1	-	-	36	160	9	*	*	170
	41%	39%	35%	-	-	39%	41%	48%	39%	20%	41%
Interest rates	147	38	1	-	-	39	103	4	-	1	107
	29%	43%	51%	-	-	43%	26%	19%	-	40%	26%
Inflation	147	27	*	-	*	28	115	3	-	*	119
	29%	31%	13%	-	100%	31%	29%	18%	-	20%	29%
Corporate Taxation	98	19	*	-	-	19	75	3	-	-	78
	19%	22%	11%	-	-	21%	19%	17%	-	-	19%
Exchange rates	88	17	1	-	*	19	64	4	1	-	69
	17%	20%	38%	-	100%	21%	16%	23%	100%	-	17%
Business rates	85	17	1	-	-	18	63	3	*	*	67
	17%	20%	27%	-	-	20%	16%	15%	39%	20%	16%
Not Stated	77	12	-	-	-	12	63	2	-	*	65
	15%	13%	-	-	-	13%	16%	9%	-	20%	16%

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Summary table

Base: All respondents

	Total	Improve	Stay the same	Worsen	Mean score
Economic growth	506 100%	290 57%	179 35%	37 7%	.50
Unemployment	506 100%	240 47%	204 40%	62 12%	.35
Inflation (Improve = Fall / Worsen = Rise)	506 100%	73 14%	211 42%	222 44%	-.30
Interest rates (Improve = Fall / Worsen = Rise)	506 100%	40 8%	160 32%	306 61%	-.53

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Economic growth

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%	
Improve	(1.0)	290	261	28	59	231	159	131	49	230	11	45	245	110	180	59	224	6
		57%	58%	53%	64%	56%	56%	58%	62%	58%	37%	56%	57%	62%	55%	61%	57%	39%
Stay the same	(0.0)	179	158	21	27	152	99	80	25	138	15	29	150	55	123	33	138	8
		35%	35%	40%	30%	37%	35%	36%	32%	35%	51%	36%	35%	31%	37%	34%	35%	52%
Worsen	(-1.0)	37	33	4	5	32	24	13	5	29	4	7	31	12	26	5	31	1
		7%	7%	8%	6%	8%	9%	6%	7%	7%	12%	8%	7%	7%	8%	5%	8%	9%
Mean Score		.50	.50	.45	.59	.48	.48	.52	.55	.51	.25	.48	.50	.56	.47	.55	.49	.31

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Economic growth

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%	
Improve	(1.0)	290	160	92	182	89	251	28	170	74
		57%	59%	61%	63%	48%	65%	29%	61%	49%
Stay the same	(0.0)	179	94	44	90	77	113	55	93	65
		35%	35%	29%	31%	42%	29%	56%	33%	43%
Worsen	(-1.0)	37	18	14	19	19	20	15	16	12
		7%	7%	9%	6%	10%	5%	15%	6%	8%
Mean Score		.50	.52	.52	.56	.38	.60	.13	.55	.41

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Economic growth

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Improve	(1.0)	290	57	1	-	*	59	220	10	1	1	231
		57%	65%	49%	-	100%	64%	56%	53%	100%	40%	56%
Stay the same	(0.0)	179	26	1	-	-	27	144	7	-	1	152
		35%	30%	40%	-	-	30%	37%	37%	-	40%	37%
Worsen	(-1.0)	37	5	*	-	-	5	30	2	-	*	32
		7%	5%	11%	-	-	6%	8%	9%	-	20%	8%
Mean Score		.50	.59	.38	-	1.00	.59	.48	.44	1.00	.20	.48

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Inflation (Improve = Fall / Worsen = Rise)

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%	
Improve	(1.0)	73	67	6	13	60	32	41	10	59	4	14	59	27	46	15	56	1
		14%	15%	11%	14%	14%	11%	18%	12%	15%	15%	18%	14%	15%	14%	16%	14%	7%
Stay the same	(0.0)	211	184	27	39	172	116	95	38	163	10	32	179	87	124	32	172	6
		42%	41%	51%	43%	41%	41%	42%	49%	41%	33%	40%	42%	49%	38%	33%	44%	39%
Worsen	(-1.0)	222	202	21	39	183	134	88	31	176	16	34	188	63	160	50	164	9
		44%	45%	38%	43%	44%	48%	39%	39%	44%	53%	43%	44%	35%	48%	51%	42%	53%
Mean Score		-.30	-.30	-.27	-.29	-.30	-.36	-.21	-.27	-.29	-.38	-.25	-.30	-.20	-.35	-.36	-.27	-.46

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Inflation (Improve = Fall / Worsen = Rise)

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%
Improve (1.0)	73 14%	38 14%	25 17%	44 15%	23 12%	57 15%	10 10%	41 15%	21 14%
Stay the same (0.0)	211 42%	118 43%	55 37%	126 44%	71 39%	163 42%	37 38%	119 43%	58 39%
Worsen (-1.0)	222 44%	117 43%	70 47%	120 41%	90 49%	163 43%	51 52%	118 43%	72 47%
Mean Score	-0.30	-0.29	-0.30	-0.26	-0.36	-0.28	-0.41	-0.28	-0.34

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Inflation (Improve = Fall / Worsen = Rise)

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Improve	(1.0)	73	12	1	-	-	13	57	3	-	-	60
		14%	14%	35%	-	-	14%	14%	15%	-	-	14%
Stay the same	(0.0)	211	38	1	-	-	39	161	9	1	1	172
		42%	44%	27%	-	-	43%	41%	49%	100%	80%	41%
Worsen	(-1.0)	222	38	1	-	*	39	176	7	-	*	183
		44%	43%	38%	-	100%	43%	45%	37%	-	20%	44%
Mean Score		-30	-29	-02	-	-1.00	-29	-30	-22	-	-20	-30

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Interest rates (Improve = Fall / Worsen = Rise)

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%	
Improve	(1.0)	40	36	4	9	31	19	21	7	32	1	9	31	15	25	14	25	1
		8%	8%	8%	10%	8%	7%	9%	9%	8%	5%	12%	7%	9%	7%	14%	6%	7%
Stay the same	(0.0)	160	142	18	24	136	92	68	24	125	11	19	140	74	86	24	131	4
		32%	31%	33%	26%	33%	33%	30%	31%	31%	36%	24%	33%	42%	26%	25%	33%	25%
Worsen	(-1.0)	306	275	32	58	248	171	135	48	240	18	51	255	87	219	59	236	11
		61%	61%	59%	64%	60%	61%	60%	61%	61%	59%	64%	60%	49%	66%	61%	60%	68%
Mean Score		-0.53	-0.53	-0.51	-0.54	-0.52	-0.54	-0.51	-0.52	-0.52	-0.55	-0.52	-0.53	-0.41	-0.59	-0.46	-0.54	-0.61

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Interest rates (Improve = Fall / Worsen = Rise)

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%	
Improve	(1.0)	40	20	14	18	21	31	7	20	15
		8%	7%	9%	6%	11%	8%	7%	7%	10%
Stay the same	(0.0)	160	97	41	95	54	119	30	85	49
		32%	35%	27%	33%	29%	31%	30%	31%	33%
Worsen	(-1.0)	306	156	95	176	110	234	61	173	87
		61%	57%	63%	61%	60%	61%	62%	62%	57%
Mean Score		-0.53	-0.50	-0.54	-0.54	-0.49	-0.53	-0.55	-0.55	-0.47

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Interest rates (Improve = Fall / Worsen = Rise)

Base: All respondents

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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%
Improve	(1.0)	40	9	-	-	9	30	2	-	-	31
		8%	10%	-	-	10%	8%	9%	-	-	8%
Stay the same	(0.0)	160	23	1	-	24	128	7	*	*	136
		32%	26%	49%	-	26%	33%	37%	39%	20%	33%
Worsen	(-1.0)	306	56	1	-	* 58	236	10	*	1	248
		61%	64%	51%	-	100% 64%	60%	54%	61%	80%	60%
Mean Score		-53	-54	-51	-	-1.00 -54	-52	-45	-61	-80	-52

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Unemployment

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%	
Improve	(1.0)	240	212	28	47	193	135	105	49	180	11	39	201	87	153	57	175	8
		47%	47%	51%	51%	47%	48%	47%	62%	45%	37%	49%	47%	49%	46%	59%	45%	47%
Stay the same	(0.0)	204	181	22	33	171	110	94	20	173	11	29	175	69	135	31	170	2
		40%	40%	42%	37%	41%	39%	42%	25%	44%	36%	36%	41%	39%	41%	32%	43%	15%
Worsen	(-1.0)	62	58	4	11	51	36	26	10	44	8	12	50	20	42	9	47	6
		12%	13%	7%	12%	12%	13%	12%	13%	11%	28%	15%	12%	12%	13%	10%	12%	38%
Mean Score		.35	.34	.45	.40	.34	.35	.35	.49	.34	.09	.34	.35	.38	.34	.49	.33	.08

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Unemployment

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%	
Improve	(1.0)	240	129	70	165	61	212	22	141	63
		47%	47%	47%	57%	33%	55%	22%	51%	42%
Stay the same	(0.0)	204	116	59	99	89	136	56	108	67
		40%	43%	39%	34%	48%	36%	57%	39%	44%
Worsen	(-1.0)	62	27	21	26	35	35	21	29	21
		12%	10%	14%	9%	19%	9%	21%	11%	14%
Mean Score		.35	.37	.32	.48	.14	.46	.01	.40	.28

QES Q2 2014

Q14 What do you expect to happen to the following UK economic indicators over the next twelve months?

Unemployment

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Improve	(1.0)	240	45	1	-	*	47	182	9	*	1	193
		47%	51%	51%	-	100%	51%	46%	50%	39%	60%	47%
Stay the same	(0.0)	204	33	1	-	-	33	162	8	*	*	171
		40%	37%	24%	-	-	37%	41%	43%	61%	20%	41%
Worsen	(-1.0)	62	10	1	-	-	11	49	1	-	*	51
		12%	11%	24%	-	-	12%	13%	8%	-	20%	12%
Mean Score		.35	.40	.27	-	1.00	.40	.34	.42	.39	.40	.34

QES Q2 2014

Q15 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

Summary table

Base: All respondents

	Total	Improve	Stay the same	Worsen	Mean score
London	506 100%	296 59%	177 35%	32 6%	.52
Company	506 100%	202 40%	263 52%	41 8%	.32

QES Q2 2014

Q15 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

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%	
Improve	(1.0)	296	266	30	51	246	177	119	58	229	10	55	241	103	194	56	232	8
		59%	59%	57%	56%	59%	63%	53%	73%	58%	33%	69%	57%	58%	59%	58%	59%	47%
Stay the same	(0.0)	177	156	21	36	141	83	94	18	145	14	22	155	61	116	35	136	6
		35%	35%	39%	40%	34%	29%	42%	23%	37%	48%	27%	36%	35%	35%	36%	35%	37%
Worsen	(-1.0)	32	30	2	4	28	21	11	3	23	6	3	30	12	20	6	23	3
		6%	7%	4%	4%	7%	8%	5%	4%	6%	19%	3%	7%	7%	6%	6%	6%	16%
Mean Score		.52	.52	.52	.52	.52	.55	.48	.69	.52	.15	.66	.50	.51	.53	.52	.53	.31

QES Q2 2014

Q15 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

London

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%	
Improve	(1.0)	296	152	96	190	88	244	40	169	86
		59%	56%	64%	65%	48%	64%	40%	61%	57%
Stay the same	(0.0)	177	101	43	87	78	122	45	92	54
		35%	37%	29%	30%	42%	32%	46%	33%	36%
Worsen	(-1.0)	32	19	10	13	18	18	14	16	11
		6%	7%	7%	4%	10%	5%	14%	6%	7%
Mean Score		.52	.49	.57	.61	.38	.59	.26	.55	.50

QES Q2 2014

Q15 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

London

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Improve	(1.0)	296	49	1	-	*	51	234	11	1	1	246
		59%	56%	49%	-	100%	56%	59%	56%	100%	40%	59%
Stay the same	(0.0)	177	35	1	-	-	36	133	7	-	1	141
		35%	40%	40%	-	-	40%	34%	38%	-	40%	34%
Worsen	(-1.0)	32	4	*	-	-	4	27	1	-	*	28
		6%	4%	11%	-	-	4%	7%	6%	-	20%	7%
Mean Score		.52	.52	.38	-	1.00	.52	.53	.50	1.00	.20	.52

QES Q2 2014

Q15 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

Company

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%	
Improve	(1.0)	202	178	25	40	162	124	78	57	146	-	51	152	76	126	44	153	5
		40%	39%	46%	44%	39%	44%	35%	72%	37%	-	64%	36%	43%	38%	45%	39%	30%
Stay the same	(0.0)	263	240	23	49	214	132	131	20	226	17	24	240	91	173	48	207	8
		52%	53%	43%	54%	51%	47%	58%	25%	57%	58%	29%	56%	51%	52%	49%	53%	52%
Worsen	(-1.0)	41	35	6	2	39	26	15	2	26	13	6	35	10	30	5	32	3
		8%	8%	11%	2%	9%	9%	7%	3%	7%	42%	7%	8%	6%	9%	5%	8%	19%
Mean Score		.32	.32	.35	.42	.30	.35	.28	.69	.30	-.42	.57	.27	.37	.29	.40	.31	.11

QES Q2 2014

Q15 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

Company

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%	
Improve	(1.0)	202	101	70	129	64	163	30	125	51
	40%	37%	47%	44%	34%	42%	31%	45%	34%	
Stay the same	(0.0)	263	150	66	140	104	192	56	134	87
	52%	55%	44%	48%	56%	50%	57%	48%	58%	
Worsen	(-1.0)	41	21	14	21	17	28	12	19	13
	8%	8%	10%	7%	9%	7%	12%	7%	9%	
Mean Score	.32	.30	.37	.37	.25	.35	.19	.38	.25	

QES Q2 2014

Q15 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

Company

Base: All respondents

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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%	
Improve	(1.0)	202	38	1	-	*	40	152	10	*	1	162
	40%	44%	38%	-	100%	44%	39%	51%	39%	40%	39%	
Stay the same	(0.0)	263	48	1	-	-	49	205	8	*	1	214
	52%	55%	51%	-	-	54%	52%	41%	61%	40%	51%	
Worsen	(-1.0)	41	1	*	-	-	2	37	2	-	*	39
	8%	1%	11%	-	-	2%	9%	8%	-	20%	9%	
Mean Score	.32	.43	.27	-	1.00	.42	.29	.43	.39	.20	.30	

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
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%
Heathrow	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%
Gatwick	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%
Don't know	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	
	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
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%
Heathrow	272	51	2	-	-	53	205	13	1	1	220
	54%	58%	65%	-	-	58%	52%	67%	100%	60%	53%
Gatwick	150	27	*	-	*	28	117	4	-	1	122
	30%	31%	11%	-	100%	31%	30%	23%	-	40%	29%
Don't know	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

	Total						Nets		Mean score
		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

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

	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%
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

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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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

	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%
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

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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

	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%
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	-1.14	-0.03	-0.16	-0.04	-0.17	-0.14	-0.21	0.02	-0.18

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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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		-1.14	-2.4	-2.0	-	-1.00	-2.4	-1.14	.17	1.00	-0.40	-1.12

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

	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%
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

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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	-0.21	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

	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%
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

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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

	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%	
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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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

	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%	
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

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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

	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%
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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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	136	21	36	121	90	67	26	119	12	29	128	54	104	29	124	5
	31%	30%	40%	40%	29%	32%	30%	33%	30%	40%	36%	30%	30%	31%	30%	32%	31%
Improved rail access into Gatwick	95	85	10	14	81	54	40	13	76	6	16	79	35	60	16	74	5
	19%	19%	19%	16%	19%	19%	18%	17%	19%	20%	20%	19%	20%	18%	17%	19%	30%
Extended runway operating hours at Heathrow (including early morning arrivals)	84	78	7	13	72	47	38	12	67	5	8	76	25	59	21	61	2
	17%	17%	13%	14%	17%	17%	17%	15%	17%	17%	10%	18%	14%	18%	22%	15%	15%
Improved terminal facilities at City Airport	57	50	7	10	47	35	21	10	42	4	13	44	20	37	11	45	1
	11%	11%	12%	11%	11%	13%	9%	13%	11%	14%	16%	10%	11%	11%	11%	11%	7%
Improved rail access into Stansted	41	37	4	8	33	25	16	9	30	2	7	34	19	23	4	35	2
	8%	8%	8%	9%	8%	9%	7%	12%	8%	5%	9%	8%	11%	7%	4%	9%	10%
None of the above	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 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

	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)	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
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)	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%
Extended runway operating hours at Heathrow (including early morning arrivals)	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%
Improved rail access into Gatwick	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%
Improved terminal facilities at City Airport	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%
Improved rail access into Stansted	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%
None of the above	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 51%	189 70%	45 30%	149 52%	95 51%	204 53%	46 47%	151 54%	71 47%
Extended runway operating hours at Heathrow (including early morning arrivals)	201 40%	162 59%	20 14%	130 45%	61 33%	163 43%	31 31%	124 45%	57 37%
Improved rail access into Gatwick	181 36%	67 25%	86 58%	97 34%	77 42%	135 35%	37 38%	102 37%	57 38%
Improved terminal facilities at City Airport	124 25%	57 21%	49 33%	68 23%	53 28%	88 23%	30 30%	69 25%	38 25%
Improved rail access into Stansted	100 20%	36 13%	42 28%	53 18%	44 24%	69 18%	23 23%	55 20%	30 20%
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/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
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	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%
Tend to support	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%
Tend to oppose	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%	-
Strongly oppose	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%
Don't know	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%
Nets																	
Support	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%
Oppose	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

	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%
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

	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%
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

	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

	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%
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

	Total	Manufacturing				Total	Services				Total
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+	
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
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 agree	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%
Tend to agree	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%
Tend to disagree	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%
Strongly disagree	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%
Don't know	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%	-
Nets																	
Agree	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%
Disagree	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

	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%
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
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 agree	253	41	1	-	-	42	200	10	-	1	211
	50%	47%	35%	-	-	46%	51%	52%	-	40%	51%
Tend to agree	131	27	1	-	*	28	97	4	-	1	102
	26%	31%	27%	-	100%	31%	25%	23%	-	40%	25%
Tend to disagree	50	5	*	-	-	6	42	2	1	-	44
	10%	6%	13%	-	-	6%	11%	9%	100%	-	11%
Strongly disagree	48	4	*	-	-	4	42	2	-	*	44
	10%	4%	13%	-	-	4%	11%	12%	-	20%	11%
Don't know	24	11	*	-	-	11	12	1	-	-	13
	5%	12%	11%	-	-	12%	3%	5%	-	-	3%
Nets											
Agree	383	68	2	-	*	70	297	14	-	1	313
	76%	78%	62%	-	100%	77%	76%	74%	-	80%	75%
Disagree	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

	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%
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
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	108	23	-	-	-	23	81	5	*	*	86
	21%	26%	-	-	-	25%	20%	25%	39%	20%	21%
Tend to support	170	35	1	-	-	37	124	8	-	*	133
	34%	40%	38%	-	-	40%	32%	44%	-	20%	32%
Tend to oppose	72	8	*	-	-	9	61	2	*	-	63
	14%	9%	13%	-	-	9%	15%	12%	61%	-	15%
Strongly oppose	79	10	*	-	*	10	66	2	-	*	69
	16%	11%	13%	-	100%	11%	17%	13%	-	20%	17%
Don't know	77	12	1	-	-	13	62	1	-	1	64
	15%	14%	35%	-	-	14%	16%	6%	-	40%	15%
Nets											
Support	278	58	1	-	-	59	205	13	*	1	219
	55%	66%	38%	-	-	65%	52%	69%	39%	40%	53%
Oppose	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

	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 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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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

	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 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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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

	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 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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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

	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	Nets		Mean score
								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

	Total	Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		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

	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%
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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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

	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%
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

	Total	Manufacturing				Total	Services				Total	
		1-19	20-199	200-499	500+		1-19	20-199	200-499	500+		
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

	Total	Business size		Industry		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		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

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Upgrades to the Piccadilly and Bakerloo lines to improve capacity

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%	
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%	*	-	-	-
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

	Total	Manufacturing				Total	Services					
		1-19	20-199	200-499	500+		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