LCCI – London Tomorrow: London Businesses

METHODOLOGY NOTE

ComRes interviewed 514 London business decision makers online between 18th August and 7th September 2015. Data were weighted to be representative of all London businesses by company size and broad industry sector. 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 Q3 2015

1. How important, if at all, do you believe new businesses and entrepreneurs are to sustaining and stimulating economic growth in London? Please select one response only. 1
Base: All respondents

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important. Summary table 3
Base: All respondents

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important. The most important 5
Base: All respondents

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important. The second most important 10
Base: All respondents

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important. The third most important 15
Base: All respondents

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important. Top three most important 20
Base: All respondents

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest. Summary table 25
Base: All respondents

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest. The biggest barrier .. 27
Base: All respondents

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest. The second biggest barrier 31
Base: All respondents

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest. The third biggest barrier 35
Base: All respondents

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest. Top three biggest barriers 39
Base: All respondents

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each Summary table 43
Base: All respondents

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each Financing London's infrastructure needs 44
Base: All respondents

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each Creating an attractive foreign investment climate 46
Base: All respondents

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each Making London an easy environment to do business 48
Base: All respondents

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each Attracting a world-class workforce to London 50
Base: All respondents

5. Which of the following, if any, would you say are the most important reasons why businesses would want to be based in London? Please select up to three. 52
Base: All respondents

6. Which of the following, if any, would you say are the biggest challenges to someone wanting to start a new business in London? Please select up to three. 55
Base: All respondents

7. In your opinion, what are the biggest challenges for small businesses looking to grow and expand in London? Please select up to three. 59
Base: All respondents

8. How successful, if at all, do you believe London is at encouraging innovative businesses and entrepreneurs to set up in the capital? Please select one response only. 62
Base: All respondents

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact. Summary table 64
Base: All respondents

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact. Summary table - Net high impact (4-5 out of 5) 65
Base: All respondents

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact. Providing more shared communal workspaces 67
Base: All respondents

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact. Creating more sector specific incubator hubs (shared communal workspaces that also provide services to support businesses, such as financing) 70
Base: All respondents

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact. Boosting the visibility of potential funding and investment available 73
Base: All respondents

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact. Providing Government support schemes (e.g. grants or advice) 76
Base: All respondents

10. Which of the following sectors, if any, do you think London businesses are most competitive in, when compared to other major UK and global cities? Please select up to three. 79
Base: All respondents

QES Q3 2015

1. How important, if at all, do you believe new businesses and entrepreneurs are to sustaining and stimulating economic growth in London? Please select one response only.

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	276	244	32	19	257	6	44	56	35	31	66	19	19	38
	54%	53%	60%	46%	54%	32%	61%	52%	51%	54%	55%	60%	50%	55%
Fairly important	192	175	18	17	175	10	24	37	28	22	49	10	12	19
	37%	38%	33%	41%	37%	56%	34%	34%	41%	38%	40%	31%	31%	27%
Not very important	19	15	3	2	17	1	2	7	-	3	2	1	3	6
	4%	3%	6%	5%	3%	3%	3%	7%	-	5%	1%	4%	8%	8%
Not at all important	8	8	-	1	6	-	1	3	-	-	2	1	1	3
	1%	2%	-	4%	1%	-	2%	3%	-	-	1%	2%	2%	5%
Don't know	20	19	1	2	18	2	-	4	6	2	3	1	3	4
	4%	4%	1%	4%	4%	9%	-	3%	8%	3%	3%	2%	9%	5%
Nets														
Important	468	418	50	36	432	16	68	93	63	53	116	28	31	57
	91%	91%	93%	87%	91%	88%	95%	87%	92%	92%	95%	92%	82%	82%
Not important	26	23	3	4	23	1	3	11	-	3	3	2	4	9
	5%	5%	6%	9%	5%	3%	5%	10%	-	5%	3%	6%	10%	13%

ComRes
Online fieldwork 18th August - 7th September 2015

QES Q3 2015

1. How important, if at all, do you believe new businesses and entrepreneurs are to sustaining and stimulating economic growth in London? Please select one response only.

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	276	142	134	32	239	5	47	229	87	189	57	207	12
	54%	58%	50%	52%	54%	43%	60%	53%	48%	57%	57%	53%	48%
Fairly important	192	89	104	21	166	5	23	169	77	115	33	152	7
	37%	36%	39%	35%	38%	42%	30%	39%	42%	35%	34%	39%	27%
Not very important	19	6	12	5	14	*	3	15	9	10	3	15	1
	4%	2%	5%	8%	3%	4%	4%	4%	5%	3%	3%	4%	3%
Not at all important	8	3	4	2	5	1	2	5	4	3	2	4	1
	1%	1%	2%	3%	1%	6%	3%	1%	2%	1%	2%	1%	6%
Don't know	20	7	11	2	17	1	2	18	6	14	4	12	4
	4%	3%	4%	3%	4%	5%	2%	4%	3%	4%	4%	3%	16%
Nets													
Important	468	231	237	53	405	10	70	398	164	304	90	359	19
	91%	94%	90%	87%	92%	85%	90%	91%	90%	92%	91%	92%	75%
Not important	26	9	17	6	19	1	6	20	13	13	5	19	2
	5%	4%	6%	10%	4%	10%	7%	5%	7%	4%	5%	5%	9%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

Summary table

Base: All respondents

	The most important	The second most important	The third most important	Top three most important
Unweighted Total	514	514	514	514
Weighted Total	514 100%	514 100%	514 100%	514 100%
Business-friendly tax and business regulations	98 19%	70 14%	56 11%	225 44%
Maintaining its place as an international financial centre	96 19%	62 12%	65 13%	223 43%
London transport infrastructure (including public transport and roads)	50 10%	88 17%	77 15%	215 42%
Affordable housing	92 18%	53 10%	52 10%	198 38%
Digital connectivity (i.e. broadband speed and mobile reception)	28 5%	46 9%	48 9%	122 24%
Membership of the European Union	44 9%	35 7%	33 6%	112 22%
A skilled domestic workforce	24 5%	31 6%	48 9%	102 20%
Openness to a skilled international workforce	15 3%	37 7%	27 5%	79 15%
Airport capacity	12 2%	25 5%	31 6%	68 13%

QES Q3 2015

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Summary table
Base: All respondents

	The most important	The second most important	The third most important	Top three most important
Unweighted Total	514	514	514	514
Weighted Total	514 100%	514 100%	514 100%	514 100%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	13 3%	21 4%	33 6%	67 13%
Openness to foreign investment	10 2%	20 4%	23 4%	54 10%
More devolved powers to collect and spend tax revenue raised in London	23 4%	16 3%	14 3%	53 10%
None of the above	8 2%	8 2%	8 2%	8 2%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The most important
Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business-friendly tax and business regulations	98	92	7	14	85	6	19	18	13	15	17	3	7	17
	19%	20%	13%	33%	18%	34%	26%	17%	20%	26%	14%	11%	17%	24%
Maintaining its place as an international financial centre	96	86	10	6	90	2	16	17	12	15	24	7	3	11
	19%	19%	18%	15%	19%	12%	22%	16%	18%	25%	20%	22%	8%	15%
Affordable housing	92	86	6	7	85	2	8	30	8	8	17	5	15	19
	18%	19%	12%	17%	18%	9%	11%	28%	12%	14%	14%	16%	39%	27%
London transport infrastructure (including public transport and roads)	50	46	4	-	50	-	10	8	7	6	12	3	3	5
	10%	10%	7%	-	11%	-	14%	8%	11%	10%	10%	10%	9%	7%
Membership of the European Union	44	36	8	-	44	-	-	10	10	5	11	4	5	4
	9%	8%	15%	-	9%	-	-	9%	15%	8%	9%	13%	12%	6%
Digital connectivity (i.e. broadband speed and mobile reception)	28	24	4	1	27	1	1	4	4	2	13	1	1	4
	5%	5%	7%	2%	6%	3%	2%	4%	6%	3%	10%	5%	3%	5%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The most important

Base: All respondents

	Total	Business size: 1-9	Business size: 10+	Industry: Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
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Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A skilled domestic workforce	24	22	2	2	21	2	2	5	4	-	8	2	1	2
	5%	5%	3%	5%	5%	9%	3%	5%	6%	-	7%	6%	2%	3%
More devolved powers to collect and spend tax revenue raised in London	23	21	2	4	19	2	7	2	2	1	8	1	-	-
	4%	5%	3%	9%	4%	12%	10%	2%	3%	1%	7%	2%	-	-
Openness to a skilled international workforce	15	9	6	1	14	1	1	1	1	3	6	1	2	-
	3%	2%	10%	2%	3%	3%	1%	1%	2%	5%	5%	4%	4%	-
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	13	11	2	5	8	1	5	1	-	2	2	3	1	*
	3%	2%	4%	12%	2%	3%	7%	1%	-	3%	1%	10%	2%	1%
Airport capacity	12	10	2	2	11	2	*	5	*	2	2	*	1	2
	2%	2%	4%	4%	2%	9%	1%	5%	1%	3%	2%	1%	2%	2%
Openness to foreign investment	10	10	1	-	10	-	2	2	3	-	3	*	1	2
	2%	2%	1%	-	2%	-	3%	2%	4%	-	3%	1%	2%	2%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The most important
Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	8	7	1	1	8	1	-	5	2	*	-	-	1	5
	2%	1%	3%	2%	2%	3%	-	5%	3%	1%	-	-	2%	7%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The most important

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business-friendly tax and business regulations	98	43	55	9	88	1	10	89	36	63	19	75	4
	19%	18%	21%	15%	20%	6%	12%	20%	20%	19%	20%	19%	17%
Maintaining its place as an international financial centre	96	48	48	11	84	2	14	82	36	60	17	74	5
	19%	20%	18%	17%	19%	16%	18%	19%	20%	18%	17%	19%	20%
Affordable housing	92	47	45	10	82	*	15	77	30	62	22	65	5
	18%	19%	17%	16%	19%	4%	20%	18%	16%	19%	22%	17%	22%
London transport infrastructure (including public transport and roads)	50	26	23	3	43	4	5	45	18	33	7	41	2
	10%	11%	9%	5%	10%	33%	7%	10%	10%	10%	7%	11%	8%
Membership of the European Union	44	29	15	8	35	1	11	33	21	23	9	34	1
	9%	12%	6%	13%	8%	12%	14%	8%	12%	7%	9%	9%	4%
Digital connectivity (i.e. broadband speed and mobile reception)	28	12	16	6	22	-	6	22	8	20	6	21	1
	5%	5%	6%	10%	5%	-	7%	5%	4%	6%	6%	5%	3%
A skilled domestic workforce	24	7	16	2	21	1	1	22	10	14	5	19	-
	5%	3%	6%	3%	5%	6%	2%	5%	5%	4%	5%	5%	-
More devolved powers to collect and spend tax revenue raised in London	23	7	16	3	20	-	4	18	5	18	3	18	2
	4%	3%	6%	5%	5%	-	5%	4%	3%	5%	3%	5%	6%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The most important
Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
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Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Openness to a skilled international workforce	15	10	5	3	13	-	3	12	6	9	2	12	1
	3%	4%	2%	4%	3%	-	4%	3%	3%	3%	2%	3%	5%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	13	5	8	*	13	-	1	12	7	7	3	9	1
	3%	2%	3%	1%	3%	-	1%	3%	4%	2%	3%	2%	3%
Airport capacity	12	5	7	1	11	1	2	10	4	8	3	8	1
	2%	2%	3%	1%	2%	6%	3%	2%	2%	2%	3%	2%	5%
Openness to foreign investment	10	4	6	2	6	2	3	8	*	10	2	9	-
	2%	2%	2%	3%	1%	16%	4%	2%	*	3%	2%	2%	-
None of the above	8	2	4	4	4	-	2	6	3	6	1	6	2
	2%	1%	2%	7%	1%	-	3%	1%	1%	2%	1%	1%	8%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The second most important

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
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Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London transport infrastructure (including public transport and roads)	88	79	9	12	76	6	11	11	16	11	20	7	8	7
	17%	17%	17%	30%	16%	32%	15%	10%	24%	18%	16%	22%	20%	11%
Business-friendly tax and business regulations	70	64	6	7	63	2	13	15	8	10	15	3	3	10
	14%	14%	11%	17%	13%	9%	19%	14%	12%	17%	13%	10%	9%	15%
Maintaining its place as an international financial centre	62	55	8	7	56	5	11	12	2	5	18	4	5	7
	12%	12%	14%	16%	12%	27%	15%	12%	3%	8%	15%	13%	13%	11%
Affordable housing	53	47	6	-	53	-	1	13	7	6	15	7	4	7
	10%	10%	12%	-	11%	-	2%	12%	11%	10%	13%	22%	10%	11%
Digital connectivity (i.e. broadband speed and mobile reception)	46	43	3	-	46	-	6	5	18	4	9	2	3	5
	9%	9%	6%	-	10%	-	8%	5%	26%	7%	7%	7%	7%	7%
Openness to a skilled international workforce	37	33	3	1	36	1	1	8	3	8	12	3	1	5
	7%	7%	6%	2%	8%	3%	2%	8%	4%	14%	10%	11%	2%	7%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The second most important
Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Membership of the European Union	35	32	3	1	34	-	3	7	6	4	11	1	3	5
	7%	7%	5%	4%	7%	-	5%	7%	8%	7%	9%	2%	9%	8%
A skilled domestic workforce	31	28	3	6	25	2	4	3	4	3	9	1	5	2
	6%	6%	6%	15%	5%	9%	6%	3%	5%	5%	7%	4%	14%	2%
Airport capacity	25	22	3	*	25	-	4	12	2	2	2	1	3	4
	5%	5%	6%	1%	5%	-	5%	11%	3%	3%	2%	5%	7%	5%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	21	19	2	3	18	2	7	5	-	3	2	1	-	5
	4%	4%	3%	8%	4%	9%	10%	5%	-	5%	2%	5%	-	8%
Openness to foreign investment	20	16	4	1	19	1	1	6	1	3	6	-	2	5
	4%	3%	8%	3%	4%	7%	2%	6%	2%	5%	5%	-	5%	7%
More devolved powers to collect and spend tax revenue raised in London	16	15	1	2	14	-	8	4	-	-	4	-	1	2
	3%	3%	3%	5%	3%	-	11%	3%	-	-	3%	-	3%	3%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The second most important

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	8	7	1	1	8	1	-	5	2	*	-	-	1	5
	2%	1%	3%	2%	2%	3%	-	5%	3%	1%	-	-	2%	7%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The second most important

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London transport infrastructure (including public transport and roads)	88	41	48	8	79	2	15	73	34	55	16	66	6
	17%	16%	18%	13%	18%	19%	20%	17%	18%	17%	16%	17%	25%
Business-friendly tax and business regulations	70	39	31	10	59	2	12	58	24	46	17	53	1
	14%	16%	12%	16%	13%	13%	16%	13%	13%	14%	17%	13%	2%
Maintaining its place as an international financial centre	62	23	39	8	52	2	8	54	12	50	9	50	3
	12%	9%	15%	13%	12%	19%	11%	12%	7%	15%	9%	13%	11%
Affordable housing	53	29	25	9	43	1	9	45	21	32	10	42	2
	10%	12%	9%	15%	10%	6%	11%	10%	11%	10%	10%	11%	8%
Digital connectivity (i.e. broadband speed and mobile reception)	46	24	22	6	38	2	5	41	22	24	15	31	-
	9%	10%	8%	10%	9%	19%	7%	9%	12%	7%	15%	8%	-
Openness to a skilled international workforce	37	25	12	4	32	-	8	29	13	23	5	30	1
	7%	10%	5%	7%	7%	-	10%	7%	7%	7%	5%	8%	6%
Membership of the European Union	35	14	21	3	32	-	5	30	10	25	5	30	1
	7%	6%	8%	5%	7%	-	7%	7%	5%	8%	5%	8%	3%
A skilled domestic workforce	31	15	15	2	28	1	3	28	11	20	7	20	4
	6%	6%	6%	3%	6%	11%	4%	6%	6%	6%	7%	5%	16%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The second most important

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Airport capacity	25	11	14	3	22	1	3	22	12	13	3	21	1
	5%	4%	5%	5%	5%	5%	4%	5%	7%	4%	3%	5%	2%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	21	8	13	1	19	1	2	19	11	10	6	14	*
	4%	3%	5%	2%	4%	7%	2%	4%	6%	3%	6%	4%	1%
Openness to foreign investment	20	9	11	1	19	-	4	17	4	16	3	14	4
	4%	4%	4%	2%	4%	-	5%	4%	2%	5%	3%	3%	16%
More devolved powers to collect and spend tax revenue raised in London	16	7	9	1	15	-	1	15	6	10	3	13	-
	3%	3%	3%	2%	3%	-	2%	3%	3%	3%	3%	3%	-
None of the above	8	2	4	4	4	-	2	6	3	6	1	6	2
	2%	1%	2%	7%	1%	-	3%	1%	1%	2%	1%	1%	8%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The third most important

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London transport infrastructure (including public transport and roads)	77	70	7	9	68	2	12	19	12	7	11	5	9	7
	15%	15%	13%	21%	14%	13%	17%	18%	18%	12%	9%	17%	22%	10%
Maintaining its place as an international financial centre	65	60	5	5	60	4	9	8	8	10	19	3	5	8
	13%	13%	10%	13%	13%	22%	12%	8%	11%	17%	16%	8%	12%	12%
Business-friendly tax and business regulations	56	51	5	5	51	2	7	8	6	7	19	5	1	5
	11%	11%	9%	13%	11%	12%	10%	8%	8%	12%	16%	17%	3%	7%
Affordable housing	52	46	6	4	48	2	6	12	6	5	15	5	2	5
	10%	10%	10%	9%	10%	12%	8%	11%	9%	8%	13%	16%	4%	7%
Digital connectivity (i.e. broadband speed and mobile reception)	48	45	3	3	45	2	10	11	6	5	9	3	3	6
	9%	10%	6%	8%	10%	9%	14%	10%	9%	8%	8%	8%	8%	8%
A skilled domestic workforce	48	43	5	7	41	2	8	6	4	8	13	1	5	5
	9%	9%	9%	17%	9%	12%	11%	6%	6%	14%	10%	4%	14%	7%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The third most important

Base: All respondents

	Total	Business size: 1-9	Business size: 10+	Industry: Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Membership of the European Union	33	28	5	-	33	-	3	5	6	3	7	3	6	5
	6%	6%	9%	-	7%	-	5%	5%	9%	5%	6%	11%	14%	7%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	33	30	2	2	30	-	4	10	3	5	10	*	1	6
	6%	7%	4%	6%	6%	-	5%	9%	4%	9%	8%	1%	2%	9%
Airport capacity	31	27	4	1	30	1	5	7	5	2	10	1	1	5
	6%	6%	7%	3%	6%	3%	7%	6%	7%	3%	8%	5%	2%	8%
Openness to a skilled international workforce	27	23	4	-	27	-	1	9	5	2	5	2	2	7
	5%	5%	7%	-	6%	-	2%	8%	7%	4%	4%	7%	6%	10%
Openness to foreign investment	23	18	5	2	21	1	5	3	6	3	4	1	2	2
	4%	4%	9%	5%	4%	3%	7%	2%	8%	6%	3%	2%	4%	2%
More devolved powers to collect and spend tax revenue raised in London	14	13	1	2	12	2	1	5	*	1	*	1	3	5
	3%	3%	2%	4%	3%	9%	2%	5%	1%	1%	*	4%	8%	7%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The third most important

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	8	7	1	1	8	1	-	5	2	*	-	-	1	5
	2%	1%	3%	2%	2%	3%	-	5%	3%	1%	-	-	2%	7%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

The third most important
Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London transport infrastructure (including public transport and roads)	77	37	40	7	68	1	12	65	31	46	12	62	3
	15%	15%	15%	12%	15%	11%	15%	15%	17%	14%	12%	16%	10%
Maintaining its place as an international financial centre	65	35	30	6	57	2	7	58	21	44	16	47	2
	13%	14%	11%	9%	13%	19%	9%	13%	11%	13%	16%	12%	10%
Business-friendly tax and business regulations	56	30	26	6	49	*	6	50	18	38	7	48	*
	11%	12%	10%	11%	11%	3%	7%	12%	10%	11%	7%	12%	1%
Affordable housing	52	25	27	4	46	3	6	46	20	32	13	34	4
	10%	10%	10%	6%	10%	22%	7%	11%	11%	10%	14%	9%	18%
Digital connectivity (i.e. broadband speed and mobile reception)	48	20	28	3	45	-	8	40	14	34	9	39	1
	9%	8%	11%	6%	10%	-	10%	9%	8%	10%	9%	10%	2%
A skilled domestic workforce	48	21	27	5	41	2	10	38	19	29	8	38	2
	9%	8%	10%	9%	9%	13%	13%	9%	10%	9%	8%	10%	7%
Membership of the European Union	33	16	17	7	26	-	4	29	11	22	7	23	2
	6%	7%	6%	11%	6%	-	5%	7%	6%	7%	7%	6%	10%

QES Q3 2015

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The third most important

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	33	18	15	2	29	2	5	28	11	22	2	29	2
	6%	7%	5%	3%	7%	13%	6%	6%	6%	7%	2%	7%	8%
Airport capacity	31	9	22	4	26	1	5	26	13	18	4	25	2
	6%	3%	8%	7%	6%	12%	6%	6%	7%	6%	4%	6%	8%
Openness to a skilled international workforce	27	17	10	5	22	-	6	21	11	16	9	16	2
	5%	7%	4%	8%	5%	-	8%	5%	6%	5%	9%	4%	8%
Openness to foreign investment	23	14	9	6	17	-	6	17	6	17	4	18	-
	4%	5%	3%	10%	4%	-	7%	4%	3%	5%	4%	5%	-
More devolved powers to collect and spend tax revenue raised in London	14	4	10	2	11	1	2	12	7	7	7	5	2
	3%	2%	4%	3%	3%	6%	2%	3%	4%	2%	7%	1%	9%
None of the above	8	2	4	4	4	-	2	6	3	6	1	6	2
	2%	1%	2%	7%	1%	-	3%	1%	1%	2%	1%	1%	8%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

Top three most important

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business-friendly tax and business regulations	225	207	18	26	199	10	39	42	27	32	51	11	11	31
	44%	45%	32%	63%	42%	56%	55%	39%	40%	55%	42%	37%	29%	45%
Maintaining its place as an international financial centre	223	201	23	18	205	11	35	37	22	30	61	13	13	26
	43%	44%	42%	44%	43%	61%	50%	35%	32%	51%	50%	43%	33%	37%
London transport infrastructure (including public transport and roads)	215	196	20	21	195	8	33	38	36	24	42	15	20	19
	42%	42%	37%	50%	41%	44%	46%	35%	52%	41%	35%	48%	51%	27%
Affordable housing	198	179	18	11	187	4	15	54	22	19	47	16	20	31
	38%	39%	34%	26%	40%	22%	21%	51%	32%	32%	39%	53%	53%	45%
Digital connectivity (i.e. broadband speed and mobile reception)	122	111	10	4	118	2	17	20	28	11	30	6	7	14
	24%	24%	19%	9%	25%	12%	24%	18%	41%	19%	25%	21%	18%	21%
Membership of the European Union	112	96	16	1	111	-	7	22	22	12	28	8	14	14
	22%	21%	30%	4%	23%	-	9%	21%	32%	20%	23%	26%	35%	21%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

Top three most important
Base: All respondents

	Total	Business size: 1-9	Business size: 10+	Industry: Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A skilled domestic workforce	102	92	10	15	87	6	14	15	12	11	30	4	11	8
	20%	20%	19%	37%	18%	31%	19%	14%	18%	19%	25%	13%	29%	12%
Openness to a skilled international workforce	79	66	13	1	78	1	4	18	9	13	22	7	5	12
	15%	14%	24%	3%	16%	7%	5%	17%	14%	22%	18%	22%	12%	17%
Airport capacity	68	59	9	3	65	2	9	23	7	5	15	3	4	11
	13%	13%	17%	8%	14%	12%	13%	22%	10%	8%	12%	11%	10%	15%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	67	61	6	10	56	2	16	16	3	10	13	5	1	12
	13%	13%	11%	25%	12%	12%	22%	15%	4%	18%	11%	16%	3%	18%
Openness to foreign investment	54	44	10	3	50	2	8	11	10	6	12	1	4	8
	10%	9%	18%	8%	11%	10%	11%	10%	14%	10%	10%	4%	11%	12%
More devolved powers to collect and spend tax revenue raised in London	53	48	4	7	45	4	16	10	2	2	12	2	4	7
	10%	11%	8%	18%	10%	22%	23%	9%	3%	3%	10%	6%	11%	10%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

Top three most important

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	8	7	1	1	8	1	-	5	2	*	-	-	1	5
	2%	1%	3%	2%	2%	3%	-	5%	3%	1%	-	-	2%	7%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

Top three most important

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business-friendly tax and business regulations	225	112	112	26	196	3	27	197	78	147	44	175	5
	44%	46%	42%	42%	44%	23%	35%	45%	43%	44%	44%	45%	21%
Maintaining its place as an international financial centre	223	106	117	24	193	7	29	194	68	155	42	171	10
	43%	43%	44%	40%	44%	54%	37%	45%	37%	47%	42%	44%	42%
London transport infrastructure (including public transport and roads)	215	104	111	18	190	8	32	183	82	134	35	169	11
	42%	42%	42%	30%	43%	63%	41%	42%	45%	40%	35%	43%	43%
Affordable housing	198	100	97	22	171	4	30	168	71	127	45	141	12
	38%	41%	37%	37%	39%	32%	38%	38%	39%	38%	45%	36%	47%
Digital connectivity (i.e. broadband speed and mobile reception)	122	57	65	15	104	2	19	103	43	79	30	91	1
	24%	23%	25%	25%	24%	19%	24%	24%	24%	24%	30%	23%	6%
Membership of the European Union	112	59	53	18	93	1	20	93	42	71	21	87	4
	22%	24%	20%	29%	21%	12%	26%	21%	23%	21%	22%	22%	17%
A skilled domestic workforce	102	43	59	9	90	4	14	88	39	63	21	76	6
	20%	17%	22%	15%	20%	30%	18%	20%	22%	19%	21%	19%	23%
Openness to a skilled international workforce	79	52	27	11	68	-	18	61	30	49	15	59	5
	15%	21%	10%	19%	15%	-	23%	14%	17%	15%	16%	15%	18%

QES Q3 2015

2. Which factors, if any, do you believe are most important to London if it is to be competitive with other major UK and global cities? Please rank up to three, where 1 = the most important, 2 = the second most important and 3 = the third most important.

Top three most important

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Airport capacity	68	25	43	8	58	3	10	58	29	39	10	55	4
	13%	10%	16%	13%	13%	23%	13%	13%	16%	12%	10%	14%	15%
Security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	67	31	36	4	61	2	8	59	28	38	11	53	3
	13%	12%	14%	6%	14%	20%	10%	14%	16%	12%	11%	13%	12%
Openness to foreign investment	54	27	27	9	43	2	12	41	11	42	9	40	4
	10%	11%	10%	15%	10%	16%	16%	9%	6%	13%	9%	10%	16%
More devolved powers to collect and spend tax revenue raised in London	53	18	35	6	46	1	7	45	17	35	12	36	4
	10%	7%	13%	10%	10%	6%	10%	10%	10%	11%	13%	9%	15%
None of the above	8	2	4	4	4	-	2	6	3	6	1	6	2
	2%	1%	2%	7%	1%	-	3%	1%	1%	2%	1%	1%	8%

QES Q3 2015

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

Summary table
Base: All respondents

	The biggest barrier	The second biggest barrier	The third biggest barrier	Top three biggest barriers
Unweighted Total	514	514	514	514
Weighted Total	514 100%	514 100%	514 100%	514 100%
The price of commercial / office space	116 22%	73 14%	62 12%	251 49%
Insufficient availability of homes	91 18%	91 18%	66 13%	248 48%
London transport costs (including public transport and the cost of driving)	42 8%	73 14%	94 18%	209 41%
Lack of skilled workers	39 8%	52 10%	39 8%	130 25%
The UK tax regime	47 9%	52 10%	28 5%	126 25%
UK immigration policies	51 10%	26 5%	41 8%	118 23%
UK business regulations	31 6%	35 7%	34 7%	100 19%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	20 4%	32 6%	43 8%	96 19%

QES Q3 2015

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

Summary table

Base: All respondents

	The biggest barrier	The second biggest barrier	The third biggest barrier	Top three biggest barriers
Unweighted Total	514	514	514	514
Weighted Total	514	514	514	514
	100%	100%	100%	100%
Limited ability to retain and spend more tax revenues raised in London	36	23	35	94
	7%	5%	7%	18%
Lack of airport capacity	19	27	30	76
	4%	5%	6%	15%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	10	13	14	37
	2%	3%	3%	7%
None of the above	11	11	11	11
	2%	2%	2%	2%
Not Stated	-	7	16	-
	-	1%	3%	-

QES Q3 2015

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The biggest barrier

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The price of commercial / office space	116	102	14	9	107	7	8	26	18	17	25	7	7	13
	22%	22%	25%	22%	23%	40%	11%	24%	26%	29%	21%	22%	19%	18%
Insufficient availability of homes	91	86	5	2	89	-	6	28	11	7	25	5	10	21
	18%	19%	9%	5%	19%	-	9%	26%	16%	12%	20%	16%	26%	31%
UK immigration policies	51	44	7	4	48	-	8	15	3	5	14	4	3	10
	10%	10%	13%	9%	10%	-	11%	14%	4%	8%	11%	14%	8%	14%
The UK tax regime	47	44	3	3	44	1	13	8	7	5	10	1	2	6
	9%	10%	5%	7%	9%	7%	18%	8%	11%	8%	8%	2%	5%	9%
London transport costs (including public transport and the cost of driving)	42	38	4	2	40	2	4	6	10	7	7	3	4	5
	8%	8%	8%	5%	8%	9%	5%	5%	15%	12%	5%	11%	10%	8%
Lack of skilled workers	39	33	6	4	35	2	4	3	7	5	14	3	2	1
	8%	7%	12%	10%	7%	13%	5%	3%	11%	8%	11%	10%	4%	1%
Limited ability to retain and spend more tax revenues raised in London	36	33	3	4	32	-	16	7	2	3	5	3	1	3
	7%	7%	6%	11%	7%	-	22%	7%	3%	5%	4%	10%	2%	4%

QES Q3 2015

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The biggest barrier

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
UK business regulations	31	28	4	8	23	1	7	3	5	5	5	1	3	3
	6%	6%	7%	21%	5%	7%	10%	3%	7%	9%	4%	2%	9%	5%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	20	18	2	2	19	2	3	-	2	1	8	2	2	-
	4%	4%	4%	4%	4%	9%	4%	-	3%	2%	7%	7%	6%	-
Lack of airport capacity	19	15	4	1	18	1	1	7	-	2	7	*	1	4
	4%	3%	8%	2%	4%	3%	1%	6%	-	4%	6%	1%	2%	5%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	10	10	-	-	10	-	1	2	-	2	3	1	1	2
	2%	2%	-	-	2%	-	2%	2%	-	3%	3%	2%	3%	2%
None of the above	11	9	2	2	9	2	-	2	3	1	*	1	2	2
	2%	2%	4%	6%	2%	12%	-	2%	5%	1%	*	2%	5%	3%

QES Q3 2015

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The biggest barrier

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The price of commercial / office space	116	54	62	11	102	2	16	100	32	83	19	89	7
	22%	22%	23%	19%	23%	18%	21%	23%	18%	25%	19%	23%	29%
Insufficient availability of homes	91	51	41	9	82	-	12	79	39	52	20	70	1
	18%	21%	15%	15%	19%	-	15%	18%	21%	16%	20%	18%	4%
UK immigration policies	51	25	25	7	45	-	7	44	20	32	13	34	4
	10%	10%	9%	11%	10%	-	10%	10%	11%	10%	13%	9%	18%
The UK tax regime	47	19	28	7	40	-	6	41	18	29	10	34	3
	9%	8%	10%	12%	9%	-	8%	9%	10%	9%	10%	9%	13%
London transport costs (including public transport and the cost of driving)	42	23	19	6	35	2	5	37	14	28	11	29	2
	8%	9%	7%	10%	8%	13%	7%	8%	8%	8%	12%	7%	8%
Lack of skilled workers	39	21	18	4	32	3	5	34	17	22	7	32	*
	8%	9%	7%	7%	7%	23%	6%	8%	9%	7%	7%	8%	2%
Limited ability to retain and spend more tax revenues raised in London	36	16	20	2	32	2	5	31	14	22	5	31	-
	7%	6%	8%	4%	7%	13%	7%	7%	8%	7%	5%	8%	-
UK business regulations	31	11	20	5	26	*	6	25	9	23	3	27	1
	6%	5%	8%	9%	6%	3%	8%	6%	5%	7%	3%	7%	4%

QES Q3 2015

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The biggest barrier

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	20	9	11	3	18	-	3	17	5	15	4	17	-
	4%	4%	4%	5%	4%	-	4%	4%	3%	5%	4%	4%	-
Lack of airport capacity	19	7	12	3	15	1	6	13	7	12	6	11	3
	4%	3%	5%	5%	3%	6%	7%	3%	4%	4%	6%	3%	11%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	10	3	7	-	7	2	4	6	4	5	2	7	2
	2%	1%	3%	-	2%	18%	5%	1%	2%	2%	2%	2%	6%
None of the above	11	8	3	2	8	1	2	9	3	9	1	9	1
	2%	3%	1%	4%	2%	5%	3%	2%	1%	3%	1%	2%	5%

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The second biggest barrier

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Insufficient availability of homes	91	81	10	7	83	4	12	16	17	10	21	6	6	9
	18%	18%	18%	18%	18%	22%	17%	15%	24%	17%	17%	19%	14%	13%
The price of commercial / office space	73	65	8	5	68	1	18	13	6	9	12	7	8	7
	14%	14%	15%	13%	14%	3%	25%	12%	9%	15%	10%	22%	21%	11%
London transport costs (including public transport and the cost of driving)	73	66	7	7	66	4	8	19	4	9	17	6	6	11
	14%	14%	13%	18%	14%	22%	11%	18%	6%	15%	14%	19%	15%	16%
Lack of skilled workers	52	47	5	4	48	1	6	11	6	5	17	2	4	6
	10%	10%	9%	9%	10%	3%	9%	10%	8%	8%	14%	7%	10%	8%
The UK tax regime	52	46	6	10	41	4	8	7	7	5	14	3	4	6
	10%	10%	10%	25%	9%	22%	11%	7%	10%	9%	11%	8%	10%	9%
UK business regulations	35	30	5	2	33	2	8	5	5	6	4	2	2	4
	7%	6%	10%	5%	7%	9%	11%	5%	7%	11%	4%	6%	6%	5%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	32	28	4	1	31	1	-	6	6	5	11	-	2	4
	6%	6%	7%	3%	6%	7%	-	5%	9%	9%	9%	-	6%	5%

QES Q3 2015

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The second biggest barrier

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of airport capacity	27	24	3	-	27	-	6	12	3	2	2	1	1	7
	5%	5%	6%	-	6%	-	8%	11%	4%	3%	2%	5%	2%	10%
UK immigration policies	26	22	4	-	26	-	3	6	4	3	7	2	1	5
	5%	5%	7%	-	6%	-	5%	5%	6%	5%	6%	6%	3%	8%
Limited ability to retain and spend more tax revenues raised in London	23	23	-	-	23	-	1	5	6	1	8	1	2	3
	5%	5%	-	-	5%	-	2%	5%	8%	1%	6%	2%	6%	5%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	13	12	1	1	12	-	2	5	-	3	3	-	-	5
	3%	3%	2%	4%	2%	-	3%	5%	-	5%	3%	-	-	7%
None of the above	11	9	2	2	9	2	-	2	3	1	*	1	2	2
	2%	2%	4%	6%	2%	12%	-	2%	5%	1%	*	2%	5%	3%
Not Stated	7	7	-	-	7	-	-	-	1	-	5	1	-	-
	1%	1%	-	-	1%	-	-	-	2%	-	4%	2%	-	-

QES Q3 2015

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The second biggest barrier

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Insufficient availability of homes	91	46	45	9	78	3	11	80	30	60	21	67	3
	18%	19%	17%	15%	18%	24%	14%	18%	17%	18%	21%	17%	10%
The price of commercial / office space	73	37	36	7	66	*	10	63	29	44	12	57	4
	14%	15%	13%	11%	15%	3%	13%	14%	16%	13%	12%	15%	17%
London transport costs (including public transport and the cost of driving)	73	28	44	7	65	1	13	59	22	51	12	51	9
	14%	11%	16%	12%	15%	6%	17%	14%	12%	15%	12%	13%	37%
Lack of skilled workers	52	22	29	5	47	-	10	41	16	36	15	35	1
	10%	9%	11%	7%	11%	-	13%	9%	9%	11%	15%	9%	5%
The UK tax regime	52	25	27	9	42	*	7	45	19	32	12	38	2
	10%	10%	10%	15%	10%	3%	9%	10%	10%	10%	12%	10%	7%
UK business regulations	35	19	16	2	30	3	7	28	12	23	4	28	3
	7%	8%	6%	4%	7%	25%	10%	6%	6%	7%	4%	7%	13%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	32	17	15	9	23	1	5	27	13	19	4	27	1
	6%	7%	6%	14%	5%	6%	7%	6%	7%	6%	4%	7%	3%
Lack of airport capacity	27	12	15	4	23	-	6	20	13	14	3	24	-
	5%	5%	6%	6%	5%	-	8%	5%	7%	4%	3%	6%	-
UK immigration policies	26	14	13	3	21	2	3	23	13	13	8	17	1
	5%	5%	5%	6%	5%	14%	4%	5%	7%	4%	8%	4%	3%

QES Q3 2015

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The second biggest barrier

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Limited ability to retain and spend more tax revenues raised in London	23	10	14	1	22	-	2	22	4	20	4	19	-
	5%	4%	5%	2%	5%	-	2%	5%	2%	6%	4%	5%	-
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	13	7	6	1	10	2	*	13	7	6	1	12	-
	3%	3%	2%	2%	2%	13%	1%	3%	4%	2%	1%	3%	-
None of the above	11	8	3	2	8	1	2	9	3	9	1	9	1
	2%	3%	1%	4%	2%	5%	3%	2%	1%	3%	1%	2%	5%
Not Stated	7	4	3	1	6	-	-	7	2	5	1	6	-
	1%	1%	1%	1%	1%	-	-	2%	1%	1%	1%	2%	-

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The third biggest barrier

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London transport costs (including public transport and the cost of driving)	94	84	9	8	85	2	16	24	11	10	21	4	5	11
	18%	18%	17%	20%	18%	10%	22%	22%	17%	17%	17%	15%	13%	15%
Insufficient availability of homes	66	57	9	3	63	2	6	16	8	11	17	3	3	9
	13%	12%	17%	8%	13%	9%	8%	15%	12%	19%	14%	11%	9%	13%
The price of commercial / office space	62	56	7	4	58	2	4	18	8	8	10	5	8	16
	12%	12%	12%	10%	12%	9%	5%	17%	12%	14%	8%	16%	20%	23%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	43	42	2	2	42	2	4	5	11	2	16	2	2	3
	8%	9%	4%	4%	9%	9%	6%	5%	16%	3%	13%	6%	5%	5%
UK immigration policies	41	33	8	3	38	1	3	10	7	5	10	1	3	8
	8%	7%	14%	8%	8%	7%	5%	9%	11%	8%	8%	2%	9%	11%
Lack of skilled workers	39	33	6	5	34	-	11	5	6	3	8	2	4	2
	8%	7%	11%	12%	7%	-	15%	5%	9%	5%	7%	7%	10%	2%

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The third biggest barrier

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Limited ability to retain and spend more tax revenues raised in London	35	33	2	5	30	2	10	6	1	3	6	3	4	5
	7%	7%	4%	11%	6%	9%	14%	6%	2%	5%	5%	10%	11%	7%
UK business regulations	34	29	5	4	30	2	7	6	1	6	5	4	1	4
	7%	6%	9%	9%	6%	13%	10%	6%	2%	11%	4%	13%	3%	6%
Lack of airport capacity	30	29	1	-	30	-	3	4	3	3	14	1	2	-
	6%	6%	2%	-	6%	-	4%	3%	4%	5%	12%	5%	6%	-
The UK tax regime	28	25	3	4	24	2	6	4	1	4	6	3	3	4
	5%	5%	5%	9%	5%	12%	8%	3%	2%	7%	5%	8%	7%	5%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	14	14	*	2	13	2	-	5	1	1	5	1	*	5
	3%	3%	1%	4%	3%	9%	-	5%	2%	1%	4%	2%	1%	7%
None of the above	11	9	2	2	9	2	-	2	3	1	*	1	2	2
	2%	2%	4%	6%	2%	12%	-	2%	5%	1%	*	2%	5%	3%
Not Stated	16	15	*	-	16	-	1	2	4	2	5	1	1	2
	3%	3%	1%	-	3%	-	2%	2%	6%	4%	4%	2%	2%	2%

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The third biggest barrier

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London transport costs (including public transport and the cost of driving)	94	47	47	9	83	2	11	83	31	63	19	68	6
	18%	19%	18%	14%	19%	13%	14%	19%	17%	19%	19%	18%	24%
Insufficient availability of homes	66	32	34	7	58	1	11	55	20	46	7	55	5
	13%	13%	13%	12%	13%	8%	15%	13%	11%	14%	7%	14%	18%
The price of commercial / office space	62	31	31	9	54	-	11	51	25	37	12	48	3
	12%	13%	12%	14%	12%	-	14%	12%	14%	11%	12%	12%	11%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	43	21	22	8	36	-	7	37	14	30	13	31	-
	8%	9%	8%	13%	8%	-	9%	8%	8%	9%	13%	8%	-
UK immigration policies	41	15	26	7	30	4	8	33	19	21	4	35	1
	8%	6%	10%	11%	7%	32%	11%	7%	11%	6%	4%	9%	6%
Lack of skilled workers	39	23	16	5	34	1	9	30	16	24	10	27	2
	8%	9%	6%	8%	8%	5%	12%	7%	9%	7%	11%	7%	8%
Limited ability to retain and spend more tax revenues raised in London	35	15	20	6	27	2	3	32	11	24	7	27	1
	7%	6%	8%	10%	6%	16%	4%	7%	6%	7%	7%	7%	3%
UK business regulations	34	21	12	2	31	1	7	27	11	22	11	21	2
	7%	9%	5%	4%	7%	6%	9%	6%	6%	7%	11%	5%	6%

QES Q3 2015

3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

The third biggest barrier

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of airport capacity	30	12	18	*	28	1	*	30	14	16	3	27	-
	6%	5%	7%	1%	6%	12%	*	7%	8%	5%	3%	7%	-
The UK tax regime	28	12	16	2	26	-	5	23	7	20	5	21	2
	5%	5%	6%	3%	6%	-	6%	5%	4%	6%	5%	5%	7%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	14	3	11	2	12	*	2	12	6	8	5	8	1
	3%	1%	4%	3%	3%	3%	2%	3%	3%	2%	5%	2%	6%
None of the above	11	8	3	2	8	1	2	9	3	9	1	9	1
	2%	3%	1%	4%	2%	5%	3%	2%	1%	3%	1%	2%	5%
Not Stated	16	7	8	2	14	-	1	15	5	11	1	13	1
	3%	3%	3%	4%	3%	-	2%	3%	3%	3%	1%	3%	6%

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

Top three biggest barriers
Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The price of commercial / office space	251	223	28	18	233	10	30	57	33	34	47	18	23	36
	49%	48%	52%	44%	49%	52%	41%	53%	48%	59%	38%	59%	60%	52%
Insufficient availability of homes	248	224	24	12	236	6	24	60	35	28	62	14	19	39
	48%	49%	45%	30%	50%	31%	33%	56%	52%	48%	51%	46%	49%	57%
London transport costs (including public transport and the cost of driving)	209	188	20	18	191	8	27	49	26	25	45	14	15	27
	41%	41%	38%	43%	40%	41%	38%	46%	38%	44%	37%	45%	39%	39%
Lack of skilled workers	130	113	17	13	117	3	21	19	19	12	39	7	9	8
	25%	25%	31%	31%	25%	16%	29%	18%	28%	21%	32%	24%	24%	12%
The UK tax regime	126	116	11	17	110	8	26	20	16	14	29	6	9	17
	25%	25%	20%	41%	23%	41%	37%	18%	23%	24%	24%	19%	22%	24%
UK immigration policies	118	100	18	7	111	1	15	30	14	12	31	7	8	23
	23%	22%	34%	17%	24%	7%	21%	28%	21%	21%	25%	23%	20%	33%
UK business regulations	100	86	14	14	85	5	22	15	11	18	14	7	7	11
	19%	19%	26%	35%	18%	28%	31%	14%	17%	31%	12%	22%	19%	16%

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

Top three biggest barriers

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	96	88	8	5	91	5	7	11	19	8	35	4	7	7
	19%	19%	14%	11%	19%	25%	10%	10%	28%	14%	29%	13%	18%	10%
Limited ability to retain and spend more tax revenues raised in London	94	89	5	9	86	2	28	19	9	6	18	7	7	11
	18%	19%	9%	22%	18%	9%	39%	17%	13%	10%	15%	22%	19%	15%
Lack of airport capacity	76	67	9	1	75	1	10	22	5	7	24	3	4	11
	15%	15%	16%	2%	16%	3%	13%	21%	8%	12%	19%	11%	10%	15%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	37	36	1	3	34	2	3	12	1	5	11	1	2	11
	7%	8%	2%	8%	7%	9%	5%	11%	2%	9%	9%	5%	4%	16%
None of the above	11	9	2	2	9	2	-	2	3	1	*	1	2	2
	2%	2%	4%	6%	2%	12%	-	2%	5%	1%	*	2%	5%	3%

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

Top three biggest barriers
Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The price of commercial / office space	251	122	129	27	222	2	37	214	87	164	43	194	14
	49%	50%	49%	44%	50%	20%	48%	49%	48%	49%	43%	50%	57%
Insufficient availability of homes	248	129	119	26	219	4	34	214	89	159	47	192	8
	48%	52%	45%	42%	50%	32%	44%	49%	49%	48%	48%	49%	33%
London transport costs (including public transport and the cost of driving)	209	97	110	22	183	4	29	179	67	142	43	149	17
	41%	39%	41%	36%	41%	32%	38%	41%	37%	43%	43%	38%	69%
Lack of skilled workers	130	67	63	13	113	3	24	106	49	81	32	94	4
	25%	27%	24%	22%	26%	28%	31%	24%	27%	24%	33%	24%	15%
The UK tax regime	126	56	71	18	108	*	18	108	45	81	27	93	7
	25%	23%	27%	29%	25%	3%	23%	25%	25%	25%	27%	24%	27%
UK immigration policies	118	54	63	17	96	6	19	99	52	67	25	87	7
	23%	22%	24%	28%	22%	46%	24%	23%	28%	20%	25%	22%	26%
UK business regulations	100	51	48	10	86	4	20	80	32	68	18	76	6
	19%	21%	18%	16%	19%	35%	26%	18%	17%	21%	18%	20%	24%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	96	47	49	19	76	1	15	81	32	63	21	74	1
	19%	19%	18%	31%	17%	6%	19%	19%	18%	19%	21%	19%	3%

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3. Which of the following, if any, do you see as the main barriers to London being competitive with other major UK and global cities? Please rank up to three, where 1 = the biggest barrier, 2 = the second biggest and 3 = the third biggest.

Top three biggest barriers

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Limited ability to retain and spend more tax revenues raised in London	94	40	54	10	81	4	10	84	28	66	17	77	1
	18%	16%	20%	16%	18%	30%	13%	19%	15%	20%	17%	20%	3%
Lack of airport capacity	76	30	46	8	66	2	12	64	34	41	11	62	3
	15%	12%	17%	13%	15%	18%	16%	15%	19%	13%	11%	16%	11%
Insufficient security measures against threats (e.g. cyber attacks or threats to London's infrastructure)	37	14	23	3	30	4	6	31	17	20	8	27	3
	7%	6%	9%	5%	7%	34%	8%	7%	10%	6%	8%	7%	12%
None of the above	11	8	3	2	8	1	2	9	3	9	1	9	1
	2%	3%	1%	4%	2%	5%	3%	2%	1%	3%	1%	2%	5%

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4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Summary table

Base: All respondents

	Financing London's infrastructure needs	Creating an attractive foreign investment climate	Making London an easy environment to do business	Attracting a world-class workforce to London
Unweighted Total	514	514	514	514
Weighted Total	514 100%	514 100%	514 100%	514 100%
The UK Government	289 56%	377 73%	244 47%	258 50%
Regional Government (i.e. City Hall / The Greater London Authority)	338 66%	194 38%	354 69%	251 49%
Local borough councils	128 25%	61 12%	154 30%	80 16%
Businesses and the private sector	95 19%	131 26%	139 27%	226 44%
None of these	13 2%	25 5%	15 3%	27 5%

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4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Financing London's infrastructure needs

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Regional Government (i.e. City Hall / The Greater London Authority)	338	303	35	25	312	14	40	67	47	43	84	21	22	36
	66%	66%	64%	62%	66%	77%	56%	62%	68%	74%	69%	69%	57%	52%
The UK Government	289	260	29	25	264	17	36	44	35	32	79	19	26	28
	56%	57%	53%	62%	56%	90%	50%	42%	52%	55%	65%	62%	68%	40%
Local borough councils	128	115	14	9	119	5	21	20	19	17	25	10	13	11
	25%	25%	25%	23%	25%	25%	30%	18%	28%	29%	20%	31%	33%	16%
Businesses and the private sector	95	85	10	9	86	4	16	17	13	14	17	6	9	10
	19%	19%	19%	23%	18%	19%	22%	15%	20%	23%	14%	20%	24%	14%
None of these	13	11	1	1	12	-	1	3	5	-	2	-	2	3
	2%	2%	2%	2%	2%	-	1%	3%	7%	-	1%	-	6%	5%

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4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Financing London's infrastructure needs

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Regional Government (i.e. City Hall / The Greater London Authority)	338	164	173	32	296	10	46	292	108	229	61	261	16
	66%	67%	65%	53%	67%	80%	59%	67%	59%	69%	61%	67%	64%
The UK Government	289	145	144	39	244	6	40	249	113	175	58	217	14
	56%	59%	54%	64%	55%	47%	52%	57%	62%	53%	58%	55%	58%
Local borough councils	128	72	57	14	113	1	19	109	43	85	24	97	7
	25%	29%	21%	23%	26%	11%	25%	25%	24%	26%	25%	25%	29%
Businesses and the private sector	95	41	54	14	80	1	14	81	36	59	22	71	2
	19%	17%	20%	23%	18%	12%	18%	19%	20%	18%	23%	18%	6%
None of these	13	8	3	2	10	1	4	9	2	10	-	11	2
	2%	3%	1%	4%	2%	5%	5%	2%	1%	3%	-	3%	8%

QES Q3 2015

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Creating an attractive foreign investment climate

Base: All respondents

	Total	Business size: 1-9	Business size: 10+	Industry: Net: Manufacturing	Industry: Net: Services	Industry: Agriculture, forestry & fishing / Production	Industry: Construction / Property	Industry: Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Industry: Information & communication	Industry: Finance & insurance / Business administration and support services	Industry: Professional, scientific & technical	Industry: Public administration and defence / Education / Health	Industry: Arts, entertainment, recreation and other services	Industry: Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK Government	377	338	39	34	343	17	51	63	52	44	101	24	26	40
	73%	73%	73%	83%	73%	90%	71%	59%	76%	75%	83%	77%	66%	58%
Regional Government (i.e. City Hall / The Greater London Authority)	194	169	25	9	185	8	25	44	24	25	40	12	15	26
	38%	37%	46%	22%	39%	41%	35%	41%	36%	43%	33%	38%	40%	37%
Businesses and the private sector	131	116	15	8	123	4	20	23	20	16	26	11	12	13
	26%	25%	27%	20%	26%	22%	28%	21%	30%	27%	21%	36%	30%	19%
Local borough councils	61	53	8	5	55	4	8	11	8	5	13	3	8	7
	12%	11%	14%	13%	12%	22%	11%	10%	12%	9%	10%	11%	22%	11%
None of these	25	24	2	1	24	-	1	10	5	1	5	1	4	5
	5%	5%	3%	2%	5%	-	1%	9%	7%	1%	4%	4%	10%	7%

QES Q3 2015

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Creating an attractive foreign investment climate

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK Government	377	187	190	42	326	10	47	330	139	238	61	299	16
	73%	76%	72%	69%	74%	81%	61%	76%	76%	72%	62%	77%	65%
Regional Government (i.e. City Hall / The Greater London Authority)	194	97	97	29	161	3	40	154	75	119	43	145	5
	38%	39%	37%	49%	37%	24%	51%	35%	41%	36%	44%	37%	21%
Businesses and the private sector	131	63	68	26	101	4	21	110	48	83	33	95	3
	26%	26%	26%	43%	23%	35%	28%	25%	26%	25%	34%	24%	14%
Local borough councils	61	27	34	9	51	1	8	52	19	42	13	42	6
	12%	11%	13%	15%	11%	7%	11%	12%	10%	13%	13%	11%	25%
None of these	25	14	10	3	21	1	7	19	4	22	4	19	3
	5%	5%	4%	5%	5%	11%	8%	4%	2%	7%	4%	5%	11%

QES Q3 2015

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Making London an easy environment to do business

Base: All respondents

	Total	Business size: 1-9	Business size: 10+	Industry: Net: Manufacturing	Industry: Net: Services	Industry: Agriculture, forestry & fishing / Production	Industry: Construction / Property	Industry: Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Industry: Information & communication	Industry: Finance & insurance / Business administration and support services	Industry: Professional, scientific & technical	Industry: Public administration and defence / Education / Health	Industry: Arts, entertainment, recreation and other services	Industry: Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Regional Government (i.e. City Hall / The Greater London Authority)	354	319	35	27	328	14	45	67	49	46	86	22	24	42
	69%	69%	65%	65%	69%	77%	64%	63%	72%	80%	71%	71%	63%	61%
The UK Government	244	214	30	19	225	12	33	37	25	28	68	21	20	21
	47%	46%	56%	46%	48%	62%	46%	35%	37%	48%	56%	67%	53%	30%
Local borough councils	154	138	17	12	142	7	19	34	22	15	29	13	15	22
	30%	30%	31%	30%	30%	37%	26%	32%	32%	26%	24%	42%	40%	32%
Businesses and the private sector	139	126	12	12	127	6	22	29	18	15	28	10	11	17
	27%	27%	23%	29%	27%	31%	31%	27%	27%	26%	23%	31%	29%	24%
None of these	15	14	1	1	14	-	1	6	4	-	2	-	2	3
	3%	3%	2%	2%	3%	-	1%	6%	6%	-	1%	-	5%	5%

QES Q3 2015

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Making London an easy environment to do business
Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Regional Government (i.e. City Hall / The Greater London Authority)	354	170	185	38	307	10	46	309	130	225	66	273	15
	69%	69%	70%	63%	69%	80%	59%	71%	71%	68%	66%	70%	62%
The UK Government	244	126	117	33	204	6	33	211	86	157	46	188	9
	47%	51%	44%	55%	46%	52%	43%	48%	47%	47%	46%	48%	37%
Local borough councils	154	79	76	26	124	5	29	126	61	93	32	111	11
	30%	32%	29%	42%	28%	38%	37%	29%	33%	28%	33%	28%	44%
Businesses and the private sector	139	72	67	22	115	1	28	111	41	98	37	97	5
	27%	29%	25%	36%	26%	9%	36%	25%	22%	29%	37%	25%	19%
None of these	15	9	4	2	12	1	3	11	1	13	2	11	2
	3%	4%	1%	3%	3%	5%	4%	3%	1%	4%	2%	3%	8%

QES Q3 2015

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Attracting a world-class workforce to London

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK Government	258	228	30	16	242	7	31	41	38	32	69	20	21	27
	50%	49%	57%	39%	51%	37%	43%	38%	55%	55%	56%	66%	55%	39%
Regional Government (i.e. City Hall / The Greater London Authority)	251	222	29	18	233	14	33	46	34	31	57	16	20	30
	49%	48%	53%	43%	49%	77%	46%	43%	49%	54%	47%	53%	52%	43%
Businesses and the private sector	226	208	18	22	204	11	33	40	33	30	45	16	18	23
	44%	45%	33%	54%	43%	59%	46%	37%	48%	52%	37%	52%	46%	33%
Local borough councils	80	69	10	5	75	3	5	11	17	10	18	7	9	5
	16%	15%	19%	12%	16%	16%	7%	10%	24%	18%	15%	24%	22%	8%
None of these	27	25	2	1	26	-	2	6	7	2	5	1	3	3
	5%	5%	4%	2%	5%	-	3%	6%	10%	4%	4%	4%	8%	5%

QES Q3 2015

4. Who do you think should be responsible in each of the following areas to ensure London is competitive with other major UK and global cities? Please select all that apply for each

Attracting a world-class workforce to London

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK Government	258	133	126	34	217	7	33	225	96	162	41	205	12
	50%	54%	47%	55%	49%	60%	42%	52%	52%	49%	42%	53%	48%
Regional Government (i.e. City Hall / The Greater London Authority)	251	121	130	31	214	5	34	216	97	154	40	198	13
	49%	49%	49%	52%	49%	44%	44%	50%	53%	46%	40%	51%	52%
Businesses and the private sector	226	120	106	32	187	7	36	189	69	157	45	171	10
	44%	48%	40%	53%	42%	55%	46%	43%	38%	47%	45%	44%	38%
Local borough councils	80	39	41	15	64	*	14	66	29	50	16	58	6
	16%	16%	15%	25%	15%	3%	18%	15%	16%	15%	16%	15%	24%
None of these	27	14	11	3	23	1	7	20	7	19	5	19	3
	5%	6%	4%	5%	5%	11%	8%	5%	4%	6%	5%	5%	11%

QES Q3 2015

5. Which of the following, if any, would you say are the most important reasons why businesses would want to be based in London? Please select up to three.

Base: All respondents

	Total	Business size: 1-9	Business size: 10+	Industry: Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Reputation as a world-leading city	379	342	38	26	353	10	59	74	50	44	96	22	24	49
	74%	74%	70%	64%	75%	53%	83%	69%	73%	76%	79%	72%	63%	70%
Access to EU markets for labour, goods and services	192	169	22	16	176	10	26	33	30	24	44	9	14	20
	37%	37%	41%	39%	37%	52%	37%	31%	45%	42%	36%	30%	36%	29%
Quality of life	171	151	20	11	160	6	18	29	33	20	42	12	12	17
	33%	33%	38%	27%	34%	31%	25%	28%	48%	35%	34%	37%	31%	25%
Specialist business hubs (e.g. Tech City)	148	136	13	12	137	6	27	17	23	21	38	8	9	14
	29%	29%	24%	29%	29%	31%	38%	16%	33%	36%	31%	26%	24%	20%
Transport infrastructure	137	121	15	8	129	5	11	28	19	13	36	10	13	19
	27%	26%	29%	19%	27%	28%	16%	27%	28%	22%	30%	31%	34%	27%
Access to airports	116	102	13	15	100	6	20	22	8	9	36	7	8	12
	22%	22%	25%	38%	21%	32%	28%	21%	11%	15%	30%	22%	22%	18%
Digital connectivity infrastructure	69	62	7	6	63	1	12	11	9	8	14	8	5	6
	13%	13%	13%	16%	13%	7%	17%	11%	13%	14%	12%	25%	14%	9%
Other	15	15	-	1	13	-	1	3	1	1	5	1	2	3
	3%	3%	-	4%	3%	-	2%	3%	2%	1%	4%	2%	6%	5%
None of the above	8	7	1	-	8	-	*	5	-	2	-	*	1	3
	2%	2%	2%	-	2%	-	1%	5%	-	3%	-	1%	2%	5%

QES Q3 2015

5. Which of the following, if any, would you say are the most important reasons why businesses would want to be based in London? Please select up to three.

Base: All respondents

	Total	Business size		Industry										
		1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Don't know	12	12	*	2	11	2	-	*	4	1	2	1	3	*
	2%	3%	1%	4%	2%	9%	-	*	6%	1%	1%	2%	8%	1%

QES Q3 2015

5. Which of the following, if any, would you say are the most important reasons why businesses would want to be based in London? Please select up to three.

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Reputation as a world-leading city	379	179	200	46	323	10	49	330	138	241	73	295	11
	74%	73%	75%	76%	73%	86%	64%	76%	76%	73%	74%	76%	46%
Access to EU markets for labour, goods and services	192	103	88	25	164	2	26	165	62	129	33	146	13
	37%	42%	33%	41%	37%	18%	33%	38%	34%	39%	34%	37%	51%
Quality of life	171	101	70	21	146	4	30	142	57	114	31	132	9
	33%	41%	26%	35%	33%	32%	38%	32%	31%	34%	31%	34%	35%
Specialist business hubs (e.g. Tech City)	148	63	86	19	126	4	15	133	59	89	29	114	5
	29%	25%	32%	32%	29%	29%	20%	31%	32%	27%	29%	29%	20%
Transport infrastructure	137	54	83	12	123	1	15	122	51	86	26	101	10
	27%	22%	31%	21%	28%	12%	19%	28%	28%	26%	27%	26%	40%
Access to airports	116	41	75	8	104	4	15	100	38	78	25	82	8
	22%	16%	28%	12%	24%	31%	20%	23%	21%	24%	26%	21%	32%
Digital connectivity infrastructure	69	28	41	9	57	4	13	56	28	41	19	46	4
	13%	11%	16%	14%	13%	32%	17%	13%	15%	12%	19%	12%	16%
Other	15	9	6	1	14	-	2	12	6	9	1	14	-
	3%	4%	2%	1%	3%	-	3%	3%	3%	3%	1%	4%	-
None of the above	8	4	4	4	4	-	4	4	3	5	2	5	1
	2%	2%	2%	7%	1%	-	5%	1%	2%	2%	2%	1%	3%
Don't know	12	6	5	1	11	1	3	9	5	7	3	7	2
	2%	2%	2%	1%	3%	5%	4%	2%	3%	2%	3%	2%	8%

QES Q3 2015

6. Which of the following, if any, would you say are the biggest challenges to someone wanting to start a new business in London? Please select up to three.

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The price of commercial space / office space	317	282	35	20	297	9	45	62	43	36	76	20	24	42
	62%	61%	64%	49%	63%	50%	64%	58%	63%	62%	63%	65%	63%	61%
Housing costs	287	260	27	19	268	6	35	66	34	32	74	16	25	40
	56%	56%	51%	46%	57%	31%	49%	62%	50%	56%	60%	51%	65%	58%
London transport costs (including public transport and the cost of driving)	142	126	16	14	128	6	18	31	23	16	27	7	15	17
	28%	27%	29%	35%	27%	34%	26%	29%	33%	27%	22%	23%	38%	25%
Uncertainty over the UK's membership of the EU	133	118	15	9	123	4	20	29	20	16	25	7	11	17
	26%	26%	28%	22%	26%	22%	28%	27%	30%	27%	21%	24%	29%	25%
Government policies towards business (i.e. tax and business regulations)	119	108	12	17	102	8	24	22	17	14	18	11	5	20
	23%	23%	22%	42%	22%	43%	34%	20%	26%	24%	15%	37%	12%	28%
Lack of skilled workers	93	85	8	7	86	2	12	11	13	7	36	6	5	7
	18%	18%	15%	17%	18%	12%	17%	11%	18%	12%	29%	20%	14%	10%
Competition from other major UK and global cities	67	58	8	7	60	5	13	12	4	10	11	3	8	8
	13%	13%	15%	16%	13%	28%	18%	11%	5%	18%	9%	10%	22%	12%

QES Q3 2015

6. Which of the following, if any, would you say are the biggest challenges to someone wanting to start a new business in London? Please select up to three.

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Limited capacity on public transport (e.g. tube, bus and rail)	59	53	6	2	57	-	11	9	7	5	18	5	3	6
	12%	12%	11%	6%	12%	-	15%	9%	11%	9%	15%	17%	8%	9%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	50	46	4	5	46	2	6	7	7	6	18	1	4	3
	10%	10%	8%	11%	10%	9%	8%	6%	10%	10%	15%	4%	10%	5%
Other	4	4	-	-	4	-	-	2	-	1	-	1	-	2
	1%	1%	-	-	1%	-	-	2%	-	1%	-	5%	-	2%
None of the above	9	9	*	-	9	-	1	2	1	2	2	-	1	2
	2%	2%	1%	-	2%	-	2%	2%	2%	3%	1%	-	3%	2%
Don't know	15	14	1	2	12	2	-	4	3	2	3	1	1	2
	3%	3%	2%	6%	3%	12%	-	3%	4%	3%	3%	2%	2%	3%

QES Q3 2015

6. Which of the following, if any, would you say are the biggest challenges to someone wanting to start a new business in London? Please select up to three.

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The price of commercial space / office space	317	149	167	28	282	7	42	275	111	206	57	243	16
	62%	60%	63%	46%	64%	55%	54%	63%	61%	62%	58%	62%	66%
Housing costs	287	146	141	26	253	8	35	252	94	193	61	212	14
	56%	59%	53%	42%	57%	70%	45%	58%	51%	58%	62%	54%	57%
London transport costs (including public transport and the cost of driving)	142	63	80	16	122	4	22	120	57	86	34	100	8
	28%	25%	30%	26%	28%	35%	28%	28%	31%	26%	34%	26%	34%
Uncertainty over the UK's membership of the EU	133	78	54	18	113	1	22	111	52	80	23	106	3
	26%	32%	20%	30%	26%	12%	28%	25%	29%	24%	23%	27%	14%
Government policies towards business (i.e. tax and business regulations)	119	54	66	20	94	5	16	104	38	82	27	85	8
	23%	22%	25%	34%	21%	45%	20%	24%	21%	25%	27%	22%	32%
Lack of skilled workers	93	38	55	12	79	2	13	80	35	57	23	65	4
	18%	15%	21%	19%	18%	17%	17%	18%	19%	17%	24%	17%	15%
Competition from other major UK and global cities	67	31	35	5	60	2	10	57	26	41	10	52	4
	13%	13%	13%	9%	14%	15%	13%	13%	14%	12%	11%	13%	17%
Limited capacity on public transport (e.g. tube, bus and rail)	59	31	28	6	51	2	11	48	21	38	10	48	1
	12%	12%	11%	11%	11%	17%	14%	11%	12%	12%	10%	12%	4%

QES Q3 2015

6. Which of the following, if any, would you say are the biggest challenges to someone wanting to start a new business in London? Please select up to three.

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	50	24	26	7	42	*	7	43	15	36	10	39	2
	10%	10%	10%	12%	10%	4%	10%	10%	8%	11%	10%	10%	6%
Other	4	2	1	1	2	1	1	3	2	2	1	3	-
	1%	1%	1%	1%	1%	6%	1%	1%	1%	1%	1%	1%	-
None of the above	9	5	2	2	7	1	1	8	2	7	-	6	3
	2%	2%	1%	3%	2%	5%	2%	2%	1%	2%	-	2%	11%
Don't know	15	9	5	1	14	-	3	12	5	10	2	13	-
	3%	4%	2%	1%	3%	-	3%	3%	3%	3%	2%	3%	-

QES Q3 2015

7. In your opinion, what are the biggest challenges for small businesses looking to grow and expand in London? Please select up to three.

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Price of commercial space / office space	355	316	39	24	331	14	44	69	47	42	88	22	28	45
	69%	69%	73%	59%	70%	77%	62%	65%	68%	73%	73%	71%	74%	65%
Difficulty accessing funding and investment	247	222	25	15	232	7	41	44	34	33	52	16	21	28
	48%	48%	46%	37%	49%	37%	57%	42%	49%	57%	43%	51%	54%	41%
London transport costs (including public transport and the cost of driving)	193	173	20	19	174	8	24	42	23	20	49	12	15	25
	38%	38%	37%	46%	37%	41%	33%	40%	34%	35%	40%	37%	39%	37%
Lack of support from Government	177	160	17	18	159	7	34	38	19	16	39	10	14	30
	34%	35%	31%	44%	34%	37%	47%	36%	28%	27%	32%	33%	38%	43%
Lack of skilled workers	119	101	18	12	107	3	21	17	18	13	31	9	7	9
	23%	22%	34%	29%	23%	16%	29%	16%	27%	22%	25%	30%	18%	13%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	56	49	7	4	53	1	7	14	4	6	15	4	5	10
	11%	11%	14%	10%	11%	3%	9%	13%	7%	11%	12%	14%	13%	14%
Other	21	21	*	2	20	2	1	5	3	1	5	2	2	5
	4%	5%	1%	4%	4%	9%	2%	5%	4%	1%	4%	7%	6%	7%

QES Q3 2015

7. In your opinion, what are the biggest challenges for small businesses looking to grow and expand in London? Please select up to three.

Base: All respondents

	Total	Business size: 1-9	Business size: 10+	Industry: Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	14	14	-	-	14	-	1	5	1	2	3	-	2	3
	3%	3%	-	-	3%	-	2%	5%	2%	3%	3%	-	5%	5%
Don't know	14	14	*	2	12	2	-	4	3	2	3	1	1	4
	3%	3%	1%	4%	3%	9%	-	3%	4%	3%	3%	2%	2%	5%

QES Q3 2015

7. In your opinion, what are the biggest challenges for small businesses looking to grow and expand in London? Please select up to three.

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Price of commercial space / office space	355	176	179	33	313	9	47	308	121	234	64	274	17
	69%	71%	68%	55%	71%	75%	61%	71%	66%	71%	65%	70%	68%
Difficulty accessing funding and investment	247	110	137	27	213	7	33	214	86	161	56	182	9
	48%	44%	52%	45%	48%	60%	42%	49%	47%	49%	57%	47%	36%
London transport costs (including public transport and the cost of driving)	193	89	103	18	169	6	36	157	62	131	29	150	14
	38%	36%	39%	30%	38%	47%	47%	36%	34%	40%	30%	38%	56%
Lack of support from Government	177	79	96	22	148	7	28	148	63	114	37	126	13
	34%	32%	36%	36%	34%	58%	37%	34%	34%	34%	38%	32%	54%
Lack of skilled workers	119	69	51	15	101	3	21	98	43	77	30	87	2
	23%	28%	19%	25%	23%	27%	27%	23%	23%	23%	30%	22%	9%
Limited digital connectivity (i.e. slow broadband speed and mobile reception)	56	30	26	14	43	-	12	44	23	33	12	43	2
	11%	12%	10%	23%	10%	-	15%	10%	13%	10%	12%	11%	6%
Other	21	11	10	2	18	1	1	20	7	14	4	16	2
	4%	4%	4%	4%	4%	6%	1%	5%	4%	4%	4%	4%	7%
None of the above	14	7	7	3	10	1	2	12	4	10	2	10	2
	3%	3%	3%	5%	2%	5%	2%	3%	2%	3%	2%	3%	8%
Don't know	14	10	4	2	12	-	*	14	4	10	2	13	-
	3%	4%	1%	3%	3%	-	1%	3%	2%	3%	2%	3%	-

QES Q3 2015

8. How successful, if at all, do you believe London is at encouraging innovative businesses and entrepreneurs to set up in the capital? Please select one response only.

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very successful	47	41	6	5	43	1	8	13	6	3	12	3	1	8
	9%	9%	11%	11%	9%	7%	11%	12%	9%	6%	10%	8%	3%	12%
Fairly successful	301	269	32	19	282	7	45	58	41	35	79	17	19	39
	59%	59%	59%	47%	60%	38%	62%	54%	60%	60%	65%	55%	49%	57%
Not very successful	101	89	12	10	91	5	14	25	10	13	16	6	11	17
	20%	19%	23%	26%	19%	28%	20%	24%	15%	23%	13%	18%	29%	24%
Not at all successful	12	11	*	3	8	2	1	2	-	1	3	1	2	2
	2%	2%	1%	8%	2%	9%	2%	2%	-	1%	3%	5%	4%	2%
Don't know	53	49	3	3	49	3	3	8	11	6	11	4	6	4
	10%	11%	6%	8%	10%	18%	5%	8%	16%	10%	9%	13%	14%	5%
Nets														
Successful	348	311	38	24	324	8	52	71	47	38	91	20	20	47
	68%	68%	70%	59%	69%	44%	73%	67%	69%	66%	75%	64%	52%	68%
Not successful	113	100	13	14	99	7	16	27	10	14	19	7	13	18
	22%	22%	24%	33%	21%	37%	22%	25%	15%	24%	16%	23%	33%	27%

QES Q3 2015

8. How successful, if at all, do you believe London is at encouraging innovative businesses and entrepreneurs to set up in the capital? Please select one response only.

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very successful	47	28	19	6	40	2	12	36	22	25	9	37	2
	9%	11%	7%	10%	9%	13%	15%	8%	12%	8%	9%	9%	8%
Fairly successful	301	137	164	34	262	5	42	259	102	199	56	236	9
	59%	56%	62%	56%	59%	42%	54%	59%	56%	60%	57%	60%	34%
Not very successful	101	53	49	16	81	4	18	83	33	69	22	71	8
	20%	21%	18%	27%	18%	34%	24%	19%	18%	21%	23%	18%	31%
Not at all successful	12	5	7	-	11	1	2	10	6	6	3	6	2
	2%	2%	3%	-	2%	6%	2%	2%	3%	2%	3%	2%	8%
Don't know	53	24	27	4	48	1	4	49	20	33	8	40	5
	10%	10%	10%	7%	11%	5%	5%	11%	11%	10%	9%	10%	19%
Nets													
Successful	348	166	183	40	301	7	54	294	124	224	65	273	11
	68%	67%	69%	67%	68%	54%	69%	67%	68%	68%	66%	70%	43%
Not successful	113	57	56	16	92	5	20	93	38	74	25	78	10
	22%	23%	21%	27%	21%	40%	26%	21%	21%	22%	26%	20%	39%

QES Q3 2015

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London.
For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact.

Summary table
Base: All respondents

								Nets		
	Total	No impact 1	2	3	4	High impact 5	Don't know	Low impact (1 or 2)	High impact (4 or 5)	Mean score
Providing more shared communal workspaces	514	29	42	169	152	73	48	72	225	3.42
	100%	6%	8%	33%	30%	14%	9%	14%	44%	
Creating more sector specific incubator hubs (shared communal workspaces that also provide services to support businesses, such as financing)	514	15	50	159	164	76	51	65	240	3.51
	100%	3%	10%	31%	32%	15%	10%	13%	47%	
Boosting the visibility of potential funding and investment available	514	12	26	115	184	135	43	38	318	3.85
	100%	2%	5%	22%	36%	26%	8%	7%	62%	
Providing Government support schemes (e.g. grants or advice)	514	19	30	125	178	127	36	49	304	3.76
	100%	4%	6%	24%	35%	25%	7%	9%	59%	

QES Q3 2015

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact.

Summary table - Net high impact (4-5 out of 5)

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Boosting the visibility of potential funding and investment available	318	283	35	24	295	11	53	54	46	38	75	20	22	29
	62%	62%	65%	58%	62%	59%	74%	51%	67%	66%	61%	66%	56%	42%
Providing Government support schemes (e.g. grants or advice)	304	270	34	24	280	12	40	57	47	32	69	22	25	34
	59%	59%	64%	60%	59%	66%	56%	54%	68%	56%	57%	71%	65%	49%
Creating more sector specific incubator hubs (shared communal workspaces that also provide services to support businesses, such as financing)	240	211	28	16	224	10	31	43	32	30	56	19	18	22
	47%	46%	53%	39%	47%	56%	44%	41%	47%	51%	46%	61%	47%	32%
Providing more shared communal workspaces	225	202	23	15	210	10	35	43	29	24	46	17	20	24
	44%	44%	43%	37%	44%	52%	49%	41%	43%	42%	38%	55%	52%	34%
None likely to have a high impact	120	110	10	13	107	5	13	34	14	13	29	4	8	23
	23%	24%	19%	33%	23%	25%	18%	32%	21%	22%	24%	13%	21%	34%

QES Q3 2015

**9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London.
For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact.**

Summary table - Net high impact (4-5 out of 5)

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Boosting the visibility of potential funding and investment available	318	158	161	43	266	9	46	272	111	207	60	246	13
	62%	64%	61%	72%	60%	72%	60%	62%	61%	63%	60%	63%	52%
Providing Government support schemes (e.g. grants or advice)	304	142	162	41	256	7	47	257	102	203	56	233	15
	59%	58%	61%	67%	58%	61%	61%	59%	56%	61%	57%	60%	60%
Creating more sector specific incubator hubs (shared communal workspaces that also provide services to support businesses, such as financing)	240	111	129	33	199	7	39	201	87	152	52	181	7
	47%	45%	49%	55%	45%	61%	50%	46%	48%	46%	52%	46%	28%
Providing more shared communal workspaces	225	106	119	31	190	5	36	189	84	141	44	174	7
	44%	43%	45%	51%	43%	39%	46%	43%	46%	43%	44%	45%	29%
None likely to have a high impact	120	59	60	11	109	1	16	104	42	78	21	90	9
	23%	24%	23%	18%	25%	5%	21%	24%	23%	24%	21%	23%	38%

QES Q3 2015

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London. For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact.

Providing more shared communal workspaces

Base: All respondents

			Business size		Industry											
		Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total		514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total		514	460	54	41	473	18	71	107	68	58	122	31	39	69
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	29	26	3	3	26	-	5	10	5	1	6	1	2	8
		6%	6%	6%	8%	5%	-	7%	9%	7%	2%	5%	2%	5%	12%
	(2.0)	42	37	6	5	37	2	12	12	-	5	8	2	2	10
		8%	8%	10%	13%	8%	13%	16%	11%	-	8%	7%	6%	6%	15%
	(3.0)	169	149	20	13	156	3	19	27	22	24	53	9	12	20
		33%	32%	37%	32%	33%	16%	27%	25%	32%	42%	43%	30%	30%	29%
	(4.0)	152	137	15	9	143	6	24	25	22	18	31	12	14	15
		30%	30%	28%	22%	30%	31%	33%	24%	32%	31%	26%	40%	35%	22%
High impact	(5.0)	73	65	8	6	67	4	11	18	7	6	15	5	7	9
		14%	14%	15%	15%	14%	22%	16%	17%	11%	10%	12%	16%	17%	13%
Don't know		48	46	2	4	45	3	*	15	12	4	10	2	3	7
		9%	10%	5%	9%	9%	18%	1%	14%	17%	7%	8%	6%	7%	10%
Nets															
Low impact (1 or 2)		72	63	9	9	63	2	16	22	5	6	14	3	4	19
		14%	14%	16%	21%	13%	13%	23%	20%	7%	10%	11%	8%	10%	27%
High impact (4 or 5)		225	202	23	15	210	10	35	43	29	24	46	17	20	24
		44%	44%	43%	37%	44%	52%	49%	41%	43%	42%	38%	55%	52%	34%

QES Q3 2015

9. There are a number of initiatives that could make it more affordable for start-ups and small businesses to set up in London.
For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact.

Providing more shared communal workspaces
Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean Score	3.42	3.43	3.38	3.26	3.44	3.74	3.36	3.32	3.47	3.43	3.37	3.64	3.58	3.09

QES Q3 2015

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Providing more shared communal workspaces
Base: All respondents

			Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total		514	247	265	61	441	12	78	436	182	332	99	390	25
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	29	15	13	8	21	*	9	20	10	19	10	16	3
		6%	6%	5%	13%	5%	4%	12%	5%	5%	6%	10%	4%	11%
	(2.0)	42	19	23	5	36	2	3	39	22	21	7	33	2
		8%	8%	9%	8%	8%	15%	4%	9%	12%	6%	7%	9%	7%
	(3.0)	169	87	82	15	149	4	25	144	54	115	32	126	11
		33%	35%	31%	25%	34%	37%	32%	33%	30%	35%	32%	32%	45%
	(4.0)	152	70	82	22	126	3	22	130	59	93	26	121	6
		30%	28%	31%	37%	29%	29%	28%	30%	32%	28%	26%	31%	23%
High impact	(5.0)	73	36	37	8	63	1	14	59	25	48	18	53	1
		14%	15%	14%	13%	14%	10%	18%	14%	14%	14%	18%	14%	6%
Don't know		48	19	28	2	45	1	5	44	13	36	5	41	2
		9%	8%	11%	4%	10%	5%	6%	10%	7%	11%	6%	10%	8%
Nets														
Low impact (1 or 2)		72	35	36	13	57	2	12	59	32	40	18	49	5
		14%	14%	13%	21%	13%	19%	16%	14%	17%	12%	18%	13%	18%
High impact (4 or 5)		225	106	119	31	190	5	36	189	84	141	44	174	7
		44%	43%	45%	51%	43%	39%	46%	43%	46%	43%	44%	45%	29%
Mean Score		3.42	3.41	3.46	3.32	3.44	3.28	3.39	3.43	3.40	3.44	3.36	3.46	3.05

QES Q3 2015

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For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact.

Creating more sector specific incubator hubs (shared communal workspaces that also provide services to support businesses, such as financing)
Base: All respondents

			Business size		Industry										
		Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total		514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total		514	460	54	41	473	18	71	107	68	58	122	31	39	69
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	15	11	4	2	13	-	2	4	4	2	2	*	1	3
		3%	2%	7%	5%	3%	-	3%	3%	5%	3%	2%	1%	3%	5%
	(2.0)	50	46	4	8	42	2	13	17	5	2	7	1	4	13
		10%	10%	7%	19%	9%	10%	18%	16%	7%	3%	5%	2%	11%	19%
	(3.0)	159	144	15	11	148	3	22	28	18	21	49	7	11	24
		31%	31%	28%	26%	31%	16%	31%	26%	26%	35%	40%	24%	30%	35%
	(4.0)	164	141	23	10	154	6	16	30	27	23	38	12	12	16
		32%	31%	42%	25%	32%	34%	23%	28%	39%	40%	31%	39%	31%	23%
High impact	(5.0)	76	70	6	6	70	4	15	13	5	6	18	7	6	6
		15%	15%	11%	14%	15%	22%	22%	12%	7%	11%	15%	23%	17%	9%
Don't know		51	48	3	5	46	3	3	15	10	5	8	3	3	7
		10%	10%	5%	12%	10%	18%	4%	14%	15%	8%	7%	11%	9%	10%
Nets															
Low impact (1 or 2)		65	57	8	10	55	2	15	21	8	3	9	1	6	16
		13%	12%	14%	23%	12%	10%	21%	19%	12%	6%	7%	4%	14%	23%
High impact (4 or 5)		240	211	28	16	224	10	31	43	32	30	56	19	18	22
		47%	46%	53%	39%	47%	56%	44%	41%	47%	51%	46%	61%	47%	32%

QES Q3 2015

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Creating more sector specific incubator hubs (shared communal workspaces that also provide services to support businesses, such as financing)

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean Score	3.51	3.52	3.45	3.29	3.53	3.82	3.44	3.35	3.43	3.58	3.55	3.89	3.51	3.15

QES Q3 2015

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Creating more sector specific incubator hubs (shared communal workspaces that also provide services to support businesses, such as financing)
Base: All respondents

			Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total		514	247	265	61	441	12	78	436	182	332	99	390	25
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	15	10	4	5	10	-	7	8	5	10	5	7	3
		3%	4%	1%	8%	2%	-	9%	2%	3%	3%	5%	2%	11%
	(2.0)	50	23	27	6	43	1	7	43	25	24	12	35	3
		10%	9%	10%	10%	10%	5%	9%	10%	14%	7%	13%	9%	11%
	(3.0)	159	84	75	14	142	3	19	140	51	108	21	126	12
		31%	34%	28%	23%	32%	29%	25%	32%	28%	33%	21%	32%	48%
	(4.0)	164	74	89	23	134	6	29	135	59	104	33	125	6
		32%	30%	34%	38%	30%	51%	37%	31%	32%	31%	33%	32%	22%
High impact	(5.0)	76	36	40	10	65	1	10	66	28	48	19	56	1
		15%	15%	15%	17%	15%	10%	13%	15%	15%	14%	19%	14%	6%
Don't know		51	20	31	3	47	1	7	44	14	36	9	42	1
		10%	8%	12%	4%	11%	5%	8%	10%	8%	11%	9%	11%	2%
Nets														
Low impact (1 or 2)		65	32	31	11	53	1	13	51	30	35	18	42	5
		13%	13%	12%	18%	12%	5%	17%	12%	16%	10%	18%	11%	22%
High impact (4 or 5)		240	111	129	33	199	7	39	201	87	152	52	181	7
		47%	45%	49%	55%	45%	61%	50%	46%	48%	46%	52%	46%	28%
Mean Score		3.51	3.46	3.57	3.48	3.51	3.70	3.41	3.53	3.48	3.53	3.53	3.54	3.00

QES Q3 2015

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Boosting the visibility of potential funding and investment available
Base: All respondents

			Business size		Industry										
		Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total		514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total		514	460	54	41	473	18	71	107	68	58	122	31	39	69
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	12	10	2	2	10	1	1	3	2	1	2	2	2	*
		2%	2%	4%	5%	2%	3%	2%	2%	3%	1%	1%	6%	5%	1%
	(2.0)	26	24	2	1	24	-	1	10	*	2	8	2	2	10
		5%	5%	4%	4%	5%	-	2%	9%	1%	4%	6%	7%	4%	14%
	(3.0)	115	104	11	9	106	3	14	28	13	14	28	5	10	23
		22%	23%	20%	22%	22%	16%	19%	26%	19%	23%	23%	16%	26%	33%
	(4.0)	184	161	23	10	173	5	29	34	24	21	48	12	10	17
		36%	35%	42%	26%	37%	28%	40%	31%	36%	37%	39%	40%	27%	25%
High impact	(5.0)	135	122	12	13	121	6	24	21	21	17	27	8	11	12
		26%	27%	23%	33%	26%	31%	34%	19%	31%	29%	22%	27%	30%	18%
Don't know		43	39	3	4	38	4	2	12	7	3	10	1	3	7
		8%	8%	6%	11%	8%	22%	3%	11%	11%	5%	8%	5%	9%	10%
Nets															
Low impact (1 or 2)		38	34	4	4	35	1	3	13	2	3	9	4	3	10
		7%	7%	8%	9%	7%	3%	4%	12%	3%	5%	8%	13%	9%	15%
High impact (4 or 5)		318	283	35	24	295	11	53	54	46	38	75	20	22	29
		62%	62%	65%	58%	62%	59%	74%	51%	67%	66%	61%	66%	56%	42%

QES Q3 2015

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For each of the following, please indicate how much of a positive impact, if any, you think it would have on the affordability of setting up in London for start-ups and small businesses, where 1 = no impact and 5 = high impact.**

Boosting the visibility of potential funding and investment available

Base: All respondents

		Business size		Industry											
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean Score	3.85	3.86	3.81	3.86	3.85	4.06	4.04	3.63	4.03	3.94	3.81	3.77	3.79	3.50

QES Q3 2015

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Boosting the visibility of potential funding and investment available

Base: All respondents

			Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total		514	247	265	61	441	12	78	436	182	332	99	390	25
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	12	3	8	1	11	1	4	8	5	7	5	4	3
		2%	1%	3%	1%	2%	6%	5%	2%	3%	2%	5%	1%	14%
	(2.0)	26	15	11	2	24	-	1	25	11	15	6	19	-
		5%	6%	4%	3%	5%	-	2%	6%	6%	5%	6%	5%	-
	(3.0)	115	53	62	10	103	2	20	95	43	72	22	85	7
		22%	21%	23%	17%	23%	16%	25%	22%	24%	22%	22%	22%	30%
	(4.0)	184	90	93	24	156	3	28	156	63	120	30	144	9
		36%	37%	35%	40%	35%	28%	36%	36%	35%	36%	31%	37%	35%
High impact	(5.0)	135	67	68	19	110	5	18	116	48	87	30	101	4
		26%	27%	25%	31%	25%	44%	24%	27%	26%	26%	30%	26%	16%
Don't know		43	18	23	4	38	1	6	36	12	30	6	36	1
		8%	7%	9%	7%	9%	5%	8%	8%	7%	9%	6%	9%	5%
Nets														
Low impact (1 or 2)		38	18	19	3	34	1	5	33	16	22	11	23	3
		7%	7%	7%	5%	8%	6%	7%	8%	9%	7%	11%	6%	14%
High impact (4 or 5)		318	158	161	43	266	9	46	272	111	207	60	246	13
		62%	64%	61%	72%	60%	72%	60%	62%	61%	63%	60%	63%	52%
Mean Score		3.85	3.89	3.84	4.04	3.82	4.10	3.78	3.87	3.81	3.88	3.78	3.90	3.43

QES Q3 2015

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Providing Government support schemes (e.g. grants or advice)

Base: All respondents

			Business size		Industry										
		Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total		514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total		514	460	54	41	473	18	71	107	68	58	122	31	39	69
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	19	17	2	1	18	1	4	5	2	1	3	1	1	5
		4%	4%	3%	2%	4%	3%	6%	5%	3%	1%	3%	5%	3%	7%
	(2.0)	30	27	3	1	29	-	6	5	3	4	8	1	2	5
		6%	6%	5%	4%	6%	-	8%	5%	5%	7%	7%	5%	6%	8%
	(3.0)	125	112	13	11	114	2	22	27	9	18	35	5	7	21
		24%	24%	25%	27%	24%	12%	30%	25%	14%	31%	29%	16%	19%	31%
	(4.0)	178	156	22	13	164	9	22	28	32	20	42	14	11	15
		35%	34%	40%	33%	35%	47%	30%	26%	47%	35%	34%	47%	29%	21%
High impact	(5.0)	127	114	13	11	116	4	18	30	15	12	27	7	14	20
		25%	25%	23%	27%	24%	19%	25%	28%	22%	21%	22%	24%	36%	28%
Don't know		36	34	2	3	33	3	-	12	7	3	7	1	3	4
		7%	7%	4%	8%	7%	18%	-	11%	11%	5%	5%	4%	7%	5%
Nets															
Low impact (1 or 2)		49	45	4	2	47	1	10	11	5	5	11	3	3	10
		9%	10%	8%	5%	10%	3%	14%	10%	7%	8%	9%	10%	9%	15%
High impact (4 or 5)		304	270	34	24	280	12	40	57	47	32	69	22	25	34
		59%	59%	64%	60%	59%	66%	56%	54%	68%	56%	57%	71%	65%	49%

QES Q3 2015

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Providing Government support schemes (e.g. grants or advice)

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean Score	3.76	3.76	3.79	3.88	3.75	3.96	3.61	3.75	3.90	3.70	3.71	3.84	3.96	3.59

QES Q3 2015

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Providing Government support schemes (e.g. grants or advice)
Base: All respondents

			Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total		514	247	265	61	441	12	78	436	182	332	99	390	25
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	19	10	7	2	15	1	4	15	11	7	7	9	3
		4%	4%	3%	4%	3%	6%	5%	3%	6%	2%	7%	2%	11%
	(2.0)	30	18	12	3	27	*	2	28	12	19	8	22	-
		6%	7%	5%	6%	6%	3%	3%	6%	6%	6%	8%	6%	-
	(3.0)	125	59	66	10	111	3	17	108	45	79	24	95	6
		24%	24%	25%	17%	25%	25%	22%	25%	25%	24%	24%	24%	24%
	(4.0)	178	85	92	17	158	2	26	151	63	115	30	140	8
		35%	35%	35%	28%	36%	19%	34%	35%	34%	35%	30%	36%	33%
High impact	(5.0)	127	57	70	24	98	5	21	106	39	87	27	94	7
		25%	23%	26%	39%	22%	41%	27%	24%	21%	26%	27%	24%	26%
Don't know		36	17	18	4	32	1	8	28	12	24	4	31	1
		7%	7%	7%	6%	7%	5%	10%	6%	7%	7%	4%	8%	5%
Nets														
Low impact (1 or 2)		49	28	19	6	42	1	6	43	23	26	15	31	3
		9%	11%	7%	10%	9%	9%	7%	10%	13%	8%	15%	8%	11%
High impact (4 or 5)		304	142	162	41	256	7	47	257	102	203	56	233	15
		59%	58%	61%	67%	58%	61%	61%	59%	56%	61%	57%	60%	60%
Mean Score		3.76	3.70	3.83	3.99	3.72	3.92	3.84	3.75	3.63	3.84	3.64	3.80	3.67

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10. Which of the following sectors, if any, do you think London businesses are most competitive in, when compared to other major UK and global cities? Please select up to three.

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Finance	349	310	39	26	323	11	51	71	39	45	89	21	22	45
	68%	67%	73%	64%	68%	59%	71%	66%	57%	78%	73%	69%	57%	66%
Creative industries (e.g. music, film, fashion)	275	248	27	20	255	12	38	44	38	30	71	19	24	33
	53%	54%	50%	49%	54%	63%	53%	41%	55%	52%	58%	61%	63%	48%
Financial technology	182	162	20	13	169	7	19	33	30	26	49	11	6	23
	35%	35%	37%	32%	36%	40%	27%	31%	44%	44%	40%	36%	15%	34%
Retail	121	109	12	15	106	6	15	41	8	11	24	6	9	28
	24%	24%	23%	37%	22%	34%	21%	39%	12%	19%	20%	21%	23%	40%
Digital industries (e.g. app development)	101	93	8	*	101	-	13	12	21	9	25	7	14	10
	20%	20%	14%	1%	21%	-	18%	11%	31%	16%	21%	22%	35%	15%
E-commerce	92	82	9	14	77	7	17	17	14	13	16	4	4	14
	18%	18%	17%	35%	16%	36%	24%	16%	20%	22%	13%	13%	11%	21%
Marketing	81	71	9	8	72	5	14	16	12	7	16	5	7	7
	16%	15%	18%	20%	15%	25%	19%	15%	18%	12%	13%	16%	17%	10%
Product design (non-digital)	40	37	2	2	37	2	8	8	3	2	10	4	3	5
	8%	8%	4%	5%	8%	9%	11%	8%	5%	4%	8%	12%	7%	8%
Healthcare / pharmaceuticals	34	30	4	2	32	-	9	8	3	4	4	4	1	6
	7%	6%	8%	5%	7%	-	13%	8%	4%	7%	4%	14%	3%	9%

QES Q3 2015

10. Which of the following sectors, if any, do you think London businesses are most competitive in, when compared to other major UK and global cities? Please select up to three.

Base: All respondents

		Business size		Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	514	387	127	35	479	16	57	80	58	90	97	48	68	51
Weighted Total	514	460	54	41	473	18	71	107	68	58	122	31	39	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Environmental industries (e.g. renewables and recycling)	10	7	2	3	7	-	3	1	-	2	2	1	1	1
	2%	2%	5%	7%	1%	-	4%	1%	-	4%	1%	4%	2%	1%
None of the above	31	29	2	1	30	1	3	9	7	2	3	2	4	6
	6%	6%	4%	2%	6%	3%	4%	8%	10%	4%	3%	6%	11%	8%

QES Q3 2015

10. Which of the following sectors, if any, do you think London businesses are most competitive in, when compared to other major UK and global cities? Please select up to three.

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	514	265	247	81	418	15	111	403	196	318	103	382	29
Weighted Total	514	247	265	61	441	12	78	436	182	332	99	390	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Finance	349	173	176	33	309	7	43	306	123	226	62	272	15
	68%	70%	67%	54%	70%	58%	55%	70%	68%	68%	62%	70%	62%
Creative industries (e.g. music, film, fashion)	275	145	130	27	240	7	33	242	108	167	60	204	12
	53%	59%	49%	45%	55%	59%	43%	55%	59%	50%	60%	52%	46%
Financial technology	182	77	105	24	153	5	23	159	55	127	25	148	9
	35%	31%	40%	40%	35%	39%	30%	36%	30%	38%	25%	38%	36%
Retail	121	60	61	14	104	4	24	98	39	83	27	88	7
	24%	24%	23%	23%	23%	32%	31%	22%	21%	25%	27%	23%	27%
Digital industries (e.g. app development)	101	57	44	15	85	1	15	86	34	67	22	77	2
	20%	23%	16%	25%	19%	6%	19%	20%	19%	20%	22%	20%	7%
E-commerce	92	37	55	16	73	4	9	82	26	66	15	75	1
	18%	15%	21%	26%	16%	29%	12%	19%	14%	20%	16%	19%	5%
Marketing	81	40	40	9	69	3	13	68	27	54	19	60	2
	16%	16%	15%	14%	16%	21%	16%	16%	15%	16%	19%	15%	9%
Product design (non-digital)	40	18	22	3	35	1	7	32	16	24	5	33	2
	8%	7%	8%	5%	8%	6%	9%	7%	9%	7%	5%	8%	9%
Healthcare / pharmaceuticals	34	13	21	11	21	3	11	24	12	23	12	19	3
	7%	5%	8%	18%	5%	23%	14%	5%	6%	7%	12%	5%	12%
Environmental industries (e.g. renewables and recycling)	10	3	7	4	6	-	4	6	6	4	5	5	-
	2%	1%	3%	6%	1%	-	5%	1%	3%	1%	5%	1%	-
None of the above	31	16	13	2	28	1	5	26	13	18	6	22	3
	6%	7%	5%	3%	6%	5%	7%	6%	7%	6%	6%	6%	12%