

LCCI – QES Q1 2015

METHODOLOGY NOTE

ComRes interviewed 503 London business decision makers online between 29th January and 16th February 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 commission a voting intention poll or a public opinion survey please contact Katharine Peacock: katharine.peacock@comres.co.uk

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

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Base: All respondents

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D1 How many people does your company employ?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1-9	448	448	-	51	397	18	55	96	62	49	109	24	35	59
	89%	100%	-	81%	90%	93%	80%	89%	95%	88%	93%	83%	89%	91%
10-19	29	-	29	9	20	1	9	6	1	3	4	3	2	3
	6%	-	52%	14%	5%	5%	13%	5%	1%	6%	3%	9%	6%	4%
20-49	15	-	15	3	12	*	5	2	*	1	3	2	1	*
	3%	-	28%	5%	3%	2%	7%	2%	*	3%	3%	8%	3%	1%
50-99	6	-	6	-	6	-	*	2	*	1	*	-	1	2
	1%	-	10%	-	1%	-	1%	2%	1%	2%	*	-	3%	3%
100-199	2	-	2	-	2	-	-	*	2	-	-	-	-	-
	*	-	4%	-	*	-	-	*	2%	-	-	-	-	-
200-249	1	-	1	-	1	-	-	*	*	*	-	-	-	*
	*	-	2%	-	*	-	-	*	1%	1%	-	-	-	1%
250-499	*	-	*	-	*	-	-	-	-	*	*	-	-	-
	*	-	1%	-	*	-	-	-	-	*	*	-	-	-
500+	2	-	2	-	2	-	-	1	-	1	1	-	-	*
	*	-	4%	-	*	-	-	1%	-	1%	1%	-	-	1%
Net: 10+	55	-	55	12	43	1	14	12	4	7	8	5	5	6
	11%	-	100%	19%	10%	7%	20%	11%	5%	12%	7%	17%	11%	9%
BCC nets														
1-19	477	448	29	60	417	19	64	102	63	52	113	27	37	62
	95%	100%	52%	95%	95%	98%	93%	95%	96%	94%	96%	92%	94%	95%

QES Q1 2015

D1 How many people does your company employ?

Base: All respondents

	Business size			Industry										
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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
20-199	23	-	23	3	19	*	5	4	2	2	3	2	2	3
	4%	-	41%	5%	4%	2%	7%	4%	4%	4%	3%	8%	6%	4%
200-499	1	-	1	-	1	-	-	*	*	*	*	-	-	*
	*	-	3%	-	*	-	-	*	1%	1%	*	-	-	1%
500+	2	-	2	-	2	-	-	1	-	1	1	-	-	*
	*	-	4%	-	*	-	-	1%	-	1%	1%	-	-	1%
ONS nets														
0-9	448	448	-	51	397	18	55	96	62	49	109	24	35	59
	89%	100%	-	81%	90%	93%	80%	89%	95%	88%	93%	83%	89%	91%
10-19	29	-	29	9	20	1	9	6	1	3	4	3	2	3
	6%	-	52%	14%	5%	5%	13%	5%	1%	6%	3%	9%	6%	4%
20-49	15	-	15	3	12	*	5	2	*	1	3	2	1	*
	3%	-	28%	5%	3%	2%	7%	2%	*	3%	3%	8%	3%	1%
50-99	6	-	6	-	6	-	*	2	*	1	*	-	1	2
	1%	-	10%	-	1%	-	1%	2%	1%	2%	*	-	3%	3%
100-249	3	-	3	-	3	-	-	1	2	*	-	-	-	*
	1%	-	6%	-	1%	-	-	1%	3%	1%	-	-	-	1%
250+	3	-	3	-	3	-	-	1	-	1	1	-	-	*
	*	-	5%	-	1%	-	-	1%	-	1%	1%	-	-	1%

QES Q1 2015

D1 How many people does your company employ?

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1-9	448	202	244	45	384	20	45	403	151	298	96	330	22
	89%	85%	92%	69%	93%	75%	66%	93%	87%	90%	82%	91%	91%
10-19	29	19	10	11	14	3	11	18	10	19	14	13	1
	6%	8%	4%	18%	3%	13%	16%	4%	6%	6%	12%	4%	5%
20-49	15	8	7	4	10	2	7	8	5	10	3	12	*
	3%	3%	3%	6%	2%	6%	10%	2%	3%	3%	2%	3%	1%
50-99	6	3	2	2	2	1	2	3	4	1	3	3	*
	1%	1%	1%	3%	1%	4%	3%	1%	2%	*	2%	1%	1%
100-199	2	2	*	1	1	-	2	*	2	-	1	1	-
	*	1%	*	2%	*	-	2%	*	1%	-	1%	*	-
200-249	1	1	*	*	*	*	*	1	-	1	-	1	*
	*	*	*	1%	*	1%	1%	*	-	*	-	*	1%
250-499	*	*	-	-	*	-	*	*	*	*	-	*	-
	*	*	-	-	*	-	*	*	*	*	-	*	-
500+	2	2	*	1	1	*	1	1	1	1	1	2	-
	*	1%	*	2%	*	1%	2%	*	1%	*	1%	*	-
Net: 10+	55	35	20	20	28	7	23	32	23	32	21	32	2
	11%	15%	8%	31%	7%	25%	34%	7%	13%	10%	18%	9%	9%
BCC nets													
1-19	477	221	254	56	397	23	56	421	161	316	110	343	23
	95%	93%	96%	87%	96%	88%	82%	97%	93%	96%	94%	95%	96%
20-199	23	13	10	7	13	3	10	12	11	11	6	16	1
	4%	5%	4%	11%	3%	10%	15%	3%	7%	3%	5%	4%	2%
200-499	1	1	*	*	1	*	1	1	*	1	-	1	*
	*	*	*	1%	*	1%	1%	*	*	*	-	*	1%
500+	2	2	*	1	1	*	1	1	1	1	1	2	-
	*	1%	*	2%	*	1%	2%	*	1%	*	1%	*	-

QES Q1 2015

D1 How many people does your company employ?

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
ONS nets													
0-9	448	202	244	45	384	20	45	403	151	298	96	330	22
	89%	85%	92%	69%	93%	75%	66%	93%	87%	90%	82%	91%	91%
10-19	29	19	10	11	14	3	11	18	10	19	14	13	1
	6%	8%	4%	18%	3%	13%	16%	4%	6%	6%	12%	4%	5%
20-49	15	8	7	4	10	2	7	8	5	10	3	12	*
	3%	3%	3%	6%	2%	6%	10%	2%	3%	3%	2%	3%	1%
50-99	6	3	2	2	2	1	2	3	4	1	3	3	*
	1%	1%	1%	3%	1%	4%	3%	1%	2%	*	2%	1%	1%
100-249	3	2	1	2	1	*	2	1	2	1	1	2	*
	1%	1%	*	2%	*	1%	3%	*	1%	*	1%	1%	1%
250+	3	2	*	1	1	*	2	1	1	1	1	2	-
	*	1%	*	2%	*	1%	2%	*	1%	*	1%	1%	-

QES Q1 2015

D2 Which of the following best describes your company sector?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing	1	1	-	1	-	1	-	-	-	-	-	-	-	-
	*	*	-	2%	-	5%	-	-	-	-	-	-	-	-
Production	19	17	1	19	-	19	-	-	-	-	-	-	-	-
	4%	4%	2%	29%	-	95%	-	-	-	-	-	-	-	-
Construction	44	33	11	44	-	-	44	-	-	-	-	-	-	-
	9%	7%	20%	69%	-	-	63%	-	-	-	-	-	-	-
Motor trades	8	8	-	-	8	-	-	8	-	-	-	-	-	-
	1%	2%	-	-	2%	-	-	7%	-	-	-	-	-	-
Wholesale	25	21	3	-	25	-	-	25	-	-	-	-	-	25
	5%	5%	6%	-	6%	-	-	23%	-	-	-	-	-	38%
Retail	41	38	3	-	41	-	-	41	-	-	-	-	-	41
	8%	8%	5%	-	9%	-	-	38%	-	-	-	-	-	62%
Transport & storage (inc. postal)	10	9	1	-	10	-	-	10	-	-	-	-	-	-
	2%	2%	2%	-	2%	-	-	9%	-	-	-	-	-	-
Accommodation & food services	25	20	4	-	25	-	-	25	-	-	-	-	-	-
	5%	5%	8%	-	6%	-	-	23%	-	-	-	-	-	-
Information & communication	65	62	4	-	65	-	-	-	65	-	-	-	-	-
	13%	14%	6%	-	15%	-	-	-	100%	-	-	-	-	-
Finance & insurance	16	13	3	-	16	-	-	-	-	16	-	-	-	-
	3%	3%	5%	-	4%	-	-	-	-	29%	-	-	-	-

QES Q1 2015

D2 Which of the following best describes your company sector?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Property	26	22	3	-	26	-	26	-	-	-	-	-	-	-
	5%	5%	6%	-	6%	-	37%	-	-	-	-	-	-	-
Professional, scientific & technical	117	109	8	-	117	-	-	-	-	-	117	-	-	-
	23%	24%	15%	-	27%	-	-	-	-	-	100%	-	-	-
Business administration and support services	39	36	4	-	39	-	-	-	-	39	-	-	-	-
	8%	8%	7%	-	9%	-	-	-	-	71%	-	-	-	-
Public administration and defence	*	*	-	-	*	-	-	-	-	-	-	*	-	-
	*	*	-	-	*	-	-	-	-	-	-	*	-	-
Education	8	8	*	-	8	-	-	-	-	-	-	8	-	-
	2%	2%	1%	-	2%	-	-	-	-	-	-	27%	-	-
Health	21	17	5	-	21	-	-	-	-	-	-	21	-	-
	4%	4%	8%	-	5%	-	-	-	-	-	-	72%	-	-
Arts, entertainment, recreation and other services	40	35	5	-	40	-	-	-	-	-	-	-	40	-
	8%	8%	8%	-	9%	-	-	-	-	-	-	-	100%	-
Nets														
Manufacturing	63	51	12	63	-	20	44	-	-	-	-	-	-	-
	13%	11%	22%	100%	-	100%	63%	-	-	-	-	-	-	-
Services	440	397	43	-	440	-	26	108	65	55	117	29	40	65
	87%	89%	78%	-	100%	-	37%	100%	100%	100%	100%	100%	100%	100%

QES Q1 2015

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	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	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing / Production	20	18	1	20	-	20	-	-	-	-	-	-	-	-
	4%	4%	2%	31%	-	100%	-	-	-	-	-	-	-	-
Construction / Property	69	55	14	44	26	-	69	-	-	-	-	-	-	-
	14%	12%	26%	69%	6%	-	100%	-	-	-	-	-	-	-
Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	108	96	12	-	108	-	-	108	-	-	-	-	-	65
	21%	21%	21%	-	24%	-	-	100%	-	-	-	-	-	100%
Information & communication	65	62	4	-	65	-	-	-	65	-	-	-	-	-
	13%	14%	6%	-	15%	-	-	-	100%	-	-	-	-	-
Finance & insurance / Business administration and support services	55	49	7	-	55	-	-	-	-	55	-	-	-	-
	11%	11%	12%	-	13%	-	-	-	-	100%	-	-	-	-
Professional, scientific & technical	117	109	8	-	117	-	-	-	-	-	117	-	-	-
	23%	24%	15%	-	27%	-	-	-	-	-	100%	-	-	-
Public administration and defence / Education / Health	29	24	5	-	29	-	-	-	-	-	-	29	-	-
	6%	5%	9%	-	7%	-	-	-	-	-	-	100%	-	-
Arts, entertainment, recreation and other services	40	35	5	-	40	-	-	-	-	-	-	-	40	-
	8%	8%	8%	-	9%	-	-	-	-	-	-	-	100%	-
Retail / wholesale	65	59	6	-	65	-	-	65	-	-	-	-	-	65
	13%	13%	11%	-	15%	-	-	61%	-	-	-	-	-	100%

QES Q1 2015

D2 Which of the following best describes your company sector?

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing	1	-	1	-	1	-	1	-	-	1	-	1	-
	*	-	*	-	*	-	1%	-	-	*	-	*	-
Production	19	5	14	*	18	-	*	18	3	15	5	9	4
	4%	2%	5%	1%	4%	-	1%	4%	2%	5%	4%	3%	18%
Construction	44	12	32	14	23	6	10	34	8	36	28	15	-
	9%	5%	12%	22%	6%	23%	14%	8%	4%	11%	24%	4%	-
Motor trades	8	-	8	-	8	-	-	8	4	4	-	4	4
	1%	-	3%	-	2%	-	-	2%	2%	1%	-	1%	16%
Wholesale	25	7	18	2	19	4	6	18	4	20	8	17	-
	5%	3%	7%	3%	5%	14%	9%	4%	3%	6%	7%	5%	-
Retail	41	15	25	5	32	4	8	33	17	24	14	26	*
	8%	6%	10%	8%	8%	15%	11%	8%	10%	7%	12%	7%	1%
Transport & storage (inc. postal)	10	3	7	*	8	2	4	6	2	8	*	10	-
	2%	1%	3%	*	2%	6%	5%	1%	1%	2%	*	3%	-
Accommodation & food services	25	15	10	3	21	1	4	21	10	15	12	12	-
	5%	6%	4%	5%	5%	3%	6%	5%	6%	4%	11%	3%	-
Information & communication	65	34	31	9	54	2	7	58	22	43	11	51	3
	13%	14%	12%	14%	13%	8%	10%	13%	13%	13%	10%	14%	14%
Finance & insurance	16	8	8	3	12	1	2	14	5	11	2	13	1
	3%	3%	3%	5%	3%	2%	3%	3%	3%	3%	2%	4%	4%
Property	26	16	9	2	21	2	3	23	14	12	4	21	*
	5%	7%	4%	3%	5%	8%	4%	5%	8%	4%	3%	6%	1%
Professional, scientific & technical	117	63	53	10	103	4	9	108	40	77	14	96	6
	23%	27%	20%	16%	25%	15%	14%	25%	23%	23%	12%	27%	26%
Business administration and support services	39	20	19	5	33	1	3	36	16	23	6	31	2
	8%	9%	7%	8%	8%	3%	4%	8%	9%	7%	5%	9%	10%

QES Q1 2015

D2 Which of the following best describes your company sector?

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Public administration and defence	*	*	*	-	*	-	-	*	*	-	-	*	-
	*	*	*	-	*	-	-	*	*	-	-	*	-
Education	8	4	4	2	6	-	1	7	4	4	2	6	-
	2%	2%	1%	3%	2%	-	2%	2%	2%	1%	2%	2%	-
Health	21	7	14	5	16	-	5	16	8	13	3	18	-
	4%	3%	5%	7%	4%	-	8%	4%	5%	4%	3%	5%	-
Arts, entertainment, recreation and other services	40	26	13	4	35	1	5	35	16	24	7	30	3
	8%	11%	5%	6%	9%	3%	7%	8%	9%	7%	6%	8%	11%
Nets													
Manufacturing	63	17	47	15	43	6	11	52	11	53	33	26	4
	13%	7%	18%	23%	10%	23%	16%	12%	6%	16%	28%	7%	18%
Services	440	220	218	50	369	20	57	382	163	277	84	336	20
	87%	93%	82%	77%	90%	77%	84%	88%	94%	84%	72%	93%	82%
Agriculture, forestry & fishing / Production	20	5	15	*	19	-	1	18	3	16	5	10	4
	4%	2%	6%	1%	5%	-	2%	4%	2%	5%	4%	3%	18%
Construction / Property	69	28	41	16	45	8	13	57	21	48	32	37	*
	14%	12%	15%	25%	11%	31%	18%	13%	12%	15%	28%	10%	1%
Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	108	40	67	10	87	10	22	86	37	70	34	69	4
	21%	17%	25%	16%	21%	38%	31%	20%	22%	21%	29%	19%	17%
Information & communication	65	34	31	9	54	2	7	58	22	43	11	51	3
	13%	14%	12%	14%	13%	8%	10%	13%	13%	13%	10%	14%	14%
Finance & insurance / Business administration and support services	55	28	27	8	46	1	5	50	21	34	8	44	3
	11%	12%	10%	13%	11%	5%	7%	12%	12%	10%	7%	12%	13%

QES Q1 2015

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Base: All respondents

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Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Professional, scientific & technical	117	63	53	10	103	4	9	108	40	77	14	96	6
	23%	27%	20%	16%	25%	15%	14%	25%	23%	23%	12%	27%	26%
Public administration and defence / Education / Health	29	12	17	6	23	-	6	23	12	18	5	24	-
	6%	5%	7%	10%	6%	-	9%	5%	7%	5%	4%	7%	-
Arts, entertainment, recreation and other services	40	26	13	4	35	1	5	35	16	24	7	30	3
	8%	11%	5%	6%	9%	3%	7%	8%	9%	7%	6%	8%	11%
Retail / wholesale	65	22	43	7	51	8	14	51	21	44	22	43	*
	13%	9%	16%	10%	12%	29%	20%	12%	12%	13%	19%	12%	1%

QES Q1 2015

D3 Which London borough is your business based in?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Barking and Dagenham	2	2	*	-	2	-	-	1	-	1	-	*	-	1
	*	*	1%	-	1%	-	-	1%	-	1%	-	1%	-	2%
Barnet	51	48	4	12	39	8	7	10	2	5	11	7	2	3
	10%	11%	7%	19%	9%	41%	10%	9%	3%	8%	10%	24%	5%	5%
Bexley	3	3	*	-	3	-	-	*	2	-	1	-	-	-
	1%	1%	1%	-	1%	-	-	*	3%	-	1%	-	-	-
Brent	8	5	3	-	8	-	-	2	*	2	2	1	1	2
	2%	1%	5%	-	2%	-	-	2%	1%	3%	1%	2%	2%	2%
Bromley	17	17	1	-	17	-	1	5	5	1	3	*	1	4
	3%	4%	2%	-	4%	-	1%	5%	8%	2%	3%	2%	2%	6%
Camden	26	24	2	2	24	2	4	*	5	5	5	*	4	*
	5%	5%	3%	3%	5%	11%	6%	*	8%	8%	4%	2%	11%	1%
City of London	22	12	10	4	18	-	5	2	-	4	10	1	1	2
	4%	3%	19%	6%	4%	-	7%	2%	-	7%	8%	2%	2%	3%
City of Westminster	31	23	8	2	29	*	7	5	2	6	5	1	5	2
	6%	5%	15%	4%	7%	2%	10%	5%	4%	10%	5%	2%	13%	3%
Croydon	14	14	-	-	14	-	2	1	5	1	4	-	1	1
	3%	3%	-	-	3%	-	3%	1%	8%	2%	4%	-	1%	2%
Ealing	15	13	2	2	14	-	2	1	4	2	4	2	1	1
	3%	3%	4%	2%	3%	-	2%	1%	6%	3%	4%	7%	1%	2%

QES Q1 2015

D3 Which London borough is your business based in?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Enfield	14	11	3	6	8	*	6	4	-	*	*	2	1	3
	3%	3%	5%	10%	2%	2%	8%	4%	-	1%	*	7%	3%	4%
Greenwich	9	8	1	-	9	-	1	-	2	2	3	-	1	-
	2%	2%	1%	-	2%	-	1%	-	3%	4%	3%	-	1%	-
Hackney	10	9	1	-	10	-	-	1	3	-	1	3	1	1
	2%	2%	2%	-	2%	-	-	1%	5%	-	1%	10%	3%	1%
Hammersmith and Fulham	19	16	3	2	17	-	2	5	4	1	3	-	3	4
	4%	3%	6%	3%	4%	-	3%	5%	6%	2%	2%	-	8%	6%
Haringey	10	9	1	-	10	-	1	2	2	1	2	*	2	2
	2%	2%	2%	-	2%	-	1%	1%	3%	2%	1%	2%	5%	2%
Harrow	19	17	1	2	16	2	1	6	-	2	6	*	2	6
	4%	4%	2%	3%	4%	11%	1%	6%	-	3%	5%	2%	4%	9%
Havering	17	17	*	4	12	4	1	6	3	1	1	-	*	2
	3%	4%	*	7%	3%	22%	1%	5%	5%	1%	1%	-	1%	4%
Hillingdon	11	11	-	-	11	-	-	6	2	2	1	-	1	4
	2%	3%	-	-	3%	-	-	5%	3%	3%	1%	-	3%	6%
Hounslow	13	12	1	4	9	-	4	1	2	1	3	1	1	1
	3%	3%	1%	6%	2%	-	6%	1%	3%	2%	3%	2%	2%	2%
Islington	11	9	2	-	11	-	1	3	-	1	5	*	2	1
	2%	2%	4%	-	3%	-	1%	3%	-	1%	4%	*	6%	2%

QES Q1 2015

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Base: All respondents

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Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Kensington and Chelsea	29	27	2	-	29	-	2	6	3	3	10	2	1	1
	6%	6%	3%	-	6%	-	3%	6%	5%	6%	9%	8%	3%	2%
Kingston upon Thames	8	8	-	4	3	-	4	-	-	-	1	2	-	-
	2%	2%	-	6%	1%	-	6%	-	-	-	1%	7%	-	-
Lambeth	13	12	1	-	13	-	-	8	2	-	3	-	1	4
	3%	3%	2%	-	3%	-	-	7%	3%	-	2%	-	1%	7%
Lewisham	14	14	*	4	10	-	4	-	4	1	4	*	1	-
	3%	3%	1%	6%	2%	-	6%	-	6%	1%	4%	2%	3%	-
Merton	7	6	1	-	7	-	-	1	-	3	1	1	*	1
	1%	1%	1%	-	2%	-	-	1%	-	6%	1%	2%	1%	2%
Newham	5	4	1	-	5	-	-	1	-	1	2	*	1	1
	1%	1%	1%	-	1%	-	-	1%	-	1%	1%	1%	1%	2%
Redbridge	8	7	1	-	8	-	-	3	2	1	1	-	1	2
	2%	2%	1%	-	2%	-	-	3%	3%	1%	1%	-	1%	3%
Richmond upon Thames	27	25	2	8	19	-	9	10	2	1	4	1	1	8
	5%	6%	3%	13%	4%	-	13%	9%	3%	1%	4%	2%	2%	12%
Southwark	14	12	2	-	14	-	1	1	2	1	4	3	2	1
	3%	3%	4%	-	3%	-	1%	1%	3%	2%	4%	9%	5%	2%
Sutton	9	9	*	-	9	-	-	4	2	2	1	-	1	-
	2%	2%	1%	-	2%	-	-	4%	3%	3%	1%	-	3%	-

QES Q1 2015

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Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Tower Hamlets	14	14	1	-	14	-	1	3	2	3	4	1	*	-
	3%	3%	1%	-	3%	-	1%	3%	3%	6%	4%	2%	1%	-
Waltham Forest	11	11	1	4	7	-	4	4	-	1	1	*	1	4
	2%	2%	1%	6%	2%	-	6%	3%	-	2%	1%	2%	2%	6%
Wandsworth	20	20	*	2	18	2	-	3	5	3	6	-	2	3
	4%	4%	*	3%	4%	11%	-	2%	8%	5%	5%	-	4%	4%
Outside London	1	1	-	-	1	-	-	-	-	-	1	-	-	-
	*	*	-	-	*	-	-	-	-	-	1%	-	-	-
Nets														
Inner London	237	202	35	17	220	5	28	40	34	28	63	12	26	22
	47%	45%	63%	26%	50%	24%	41%	38%	52%	51%	54%	40%	66%	34%
Outer London	265	244	20	47	218	15	41	67	31	27	53	17	13	43
	53%	55%	37%	74%	50%	76%	59%	62%	48%	49%	45%	60%	34%	66%

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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Barking and Dagenham	2	-	2	1	2	-	1	1	*	2	1	1	-
	*	-	1%	1%	*	-	2%	*	*	1%	1%	*	-
Barnet	51	-	51	3	47	1	4	48	16	35	11	33	7
	10%	-	19%	5%	11%	5%	6%	11%	9%	11%	9%	9%	29%
Bexley	3	-	3	-	3	-	*	3	*	3	1	2	-
	1%	-	1%	-	1%	-	1%	1%	*	1%	1%	1%	-
Brent	8	-	8	1	5	1	1	6	3	5	4	4	-
	2%	-	3%	1%	1%	6%	2%	1%	2%	1%	3%	1%	-
Bromley	17	-	17	*	14	3	4	13	5	12	5	13	-
	3%	-	7%	1%	3%	10%	6%	3%	3%	4%	4%	4%	-
Camden	26	26	-	2	22	1	3	23	9	17	4	21	1
	5%	11%	-	4%	5%	4%	4%	5%	5%	5%	3%	6%	3%
City of London	22	22	-	7	14	*	5	17	6	15	6	15	1
	4%	9%	-	11%	4%	2%	7%	4%	4%	5%	5%	4%	4%
City of Westminster	31	31	-	8	20	4	8	23	15	16	8	23	1
	6%	13%	-	12%	5%	16%	12%	5%	9%	5%	6%	6%	3%
Croydon	14	-	14	2	11	1	2	13	7	7	3	11	1
	3%	-	5%	3%	3%	6%	2%	3%	4%	2%	2%	3%	2%
Ealing	15	-	15	2	12	1	3	12	8	7	-	15	-
	3%	-	6%	3%	3%	5%	4%	3%	5%	2%	-	4%	-
Enfield	14	-	14	1	13	-	2	12	1	13	5	10	-
	3%	-	5%	2%	3%	-	3%	3%	1%	4%	4%	3%	-
Greenwich	9	-	9	3	6	-	-	9	3	6	-	8	1
	2%	-	3%	4%	1%	-	-	2%	1%	2%	-	2%	3%
Hackney	10	10	-	3	7	-	1	9	3	7	4	6	1
	2%	4%	-	4%	2%	-	2%	2%	2%	2%	3%	2%	2%

QES Q1 2015

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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hammersmith and Fulham	19	19	-	5	13	-	5	14	5	13	4	14	-
	4%	8%	-	8%	3%	-	7%	3%	3%	4%	3%	4%	-
Haringey	10	10	-	-	9	*	2	8	3	7	3	6	1
	2%	4%	-	-	2%	1%	3%	2%	2%	2%	3%	2%	4%
Harrow	19	-	19	-	17	1	-	19	4	15	7	12	*
	4%	-	7%	-	4%	4%	-	4%	2%	4%	6%	3%	1%
Havering	17	-	17	-	17	-	1	16	5	12	1	12	4
	3%	-	6%	-	4%	-	2%	4%	3%	4%	1%	3%	16%
Hillingdon	11	-	11	-	11	-	1	11	3	9	-	10	2
	2%	-	4%	-	3%	-	1%	2%	2%	3%	-	3%	8%
Hounslow	13	-	13	-	13	-	1	12	4	9	*	13	-
	3%	-	5%	-	3%	-	1%	3%	2%	3%	*	4%	-
Islington	11	11	-	1	11	-	1	11	5	6	1	11	-
	2%	5%	-	1%	3%	-	1%	2%	3%	2%	*	3%	-
Kensington and Chelsea	29	29	-	*	25	3	2	26	11	17	6	20	3
	6%	12%	-	1%	6%	11%	3%	6%	7%	5%	5%	5%	13%
Kingston upon Thames	8	-	8	-	3	4	1	6	3	4	4	3	-
	2%	-	3%	-	1%	16%	2%	1%	2%	1%	3%	1%	-
Lambeth	13	13	-	4	8	1	4	9	2	11	8	5	-
	3%	5%	-	6%	2%	5%	6%	2%	1%	3%	7%	1%	-
Lewisham	14	14	-	2	12	1	2	13	3	11	2	13	-
	3%	6%	-	3%	3%	3%	3%	3%	2%	3%	2%	3%	-
Merton	7	-	7	1	5	-	1	6	1	6	1	6	-
	1%	-	3%	2%	1%	-	1%	1%	1%	2%	1%	2%	-
Newham	5	5	-	1	4	-	*	4	1	4	1	3	1
	1%	2%	-	2%	1%	-	*	1%	*	1%	1%	1%	2%

QES Q1 2015

D3 Which London borough is your business based in?

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Redbridge	8	-	8	*	7	-	*	7	6	2	*	7	*
	2%	-	3%	1%	2%	-	1%	2%	3%	1%	*	2%	1%
Richmond upon Thames	27	-	27	5	22	*	8	19	9	18	9	18	-
	5%	-	10%	8%	5%	1%	11%	4%	5%	6%	8%	5%	-
Southwark	14	14	-	4	10	-	3	11	5	9	-	14	-
	3%	6%	-	5%	2%	-	5%	2%	3%	3%	-	4%	-
Sutton	9	-	9	2	7	-	*	9	5	5	1	8	-
	2%	-	4%	3%	2%	-	1%	2%	3%	1%	1%	2%	-
Tower Hamlets	14	14	-	1	12	1	*	14	6	8	4	9	1
	3%	6%	-	1%	3%	5%	1%	3%	4%	2%	3%	2%	6%
Waltham Forest	11	-	11	5	7	-	1	10	3	8	7	4	-
	2%	-	4%	7%	2%	-	2%	2%	2%	2%	6%	1%	-
Wandsworth	20	20	-	2	18	-	*	20	12	8	7	13	1
	4%	8%	-	3%	4%	-	*	5%	7%	3%	6%	3%	2%
Outside London	1	-	-	-	1	-	-	1	-	1	-	1	-
	*	-	-	-	*	-	-	*	-	*	-	*	-
Nets													
Inner London	237	237	-	39	186	12	37	200	87	150	56	172	9
	47%	100%	-	59%	45%	47%	53%	46%	50%	45%	48%	47%	39%
Outer London	265	-	265	26	224	14	32	233	86	179	61	189	15
	53%	-	100%	41%	54%	53%	47%	54%	50%	54%	52%	52%	61%

QES Q1 2015

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

Summary table

Base: All respondents

	Total	Up	Same	Down	Mean score
Cashflow	503 100%	105 21%	254 51%	144 29%	-.08
Domestic sales	503 100%	88 18%	300 60%	115 23%	-.05
Business domestic orders	503 100%	80 16%	322 64%	101 20%	-.04
Employment	503 100%	32 6%	418 83%	54 11%	-.04

QES Q1 2015

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

Domestic sales

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	88	68	21	6	82	*	8	25	14	11	15	7	7	15
		18%	15%	38%	10%	19%	2%	12%	23%	21%	21%	13%	25%	18%	23%
Same	(0.0)	300	274	26	41	258	9	49	59	36	36	71	17	22	34
		60%	61%	47%	66%	59%	48%	71%	54%	56%	66%	61%	58%	54%	52%
Down	(-1.0)	115	106	8	16	99	10	12	24	15	7	31	5	11	17
		23%	24%	15%	25%	22%	49%	17%	23%	23%	13%	26%	17%	27%	25%
Mean Score		-.05	-.09	.23	-.15	-.04	-.47	-.05	*	-.02	.07	-.13	.08	-.09	-.03

QES Q1 2015

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

Domestic sales

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	88	37	51	20	68	1	19	69	43	46	22	64	2
		18%	16%	19%	30%	16%	4%	28%	16%	25%	14%	19%	18%	8%
Same	(0.0)	300	143	157	32	261	7	34	266	112	188	64	227	8
		60%	61%	59%	49%	63%	27%	50%	61%	65%	57%	55%	63%	34%
Down	(-1.0)	115	56	57	13	84	18	15	99	19	96	30	70	14
		23%	24%	22%	20%	20%	68%	22%	23%	11%	29%	26%	19%	58%
Mean Score		-.05	-.08	-.02	.10	-.04	-.64	.06	-.07	.14	-.15	-.07	-.02	-.50

QES Q1 2015

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

Business domestic orders

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	80	70	10	9	71	*	12	21	13	8	14	6	6	14
		16%	16%	19%	14%	16%	2%	17%	19%	20%	14%	12%	20%	16%	22%
Same	(0.0)	322	285	37	42	280	13	47	65	40	40	74	19	25	35
		64%	64%	67%	66%	64%	64%	68%	60%	62%	72%	63%	65%	62%	53%
Down	(-1.0)	101	94	8	13	89	6	11	22	12	8	29	5	9	16
		20%	21%	14%	20%	20%	33%	15%	20%	18%	14%	25%	16%	21%	25%
Mean Score		-.04	-.05	.05	-.06	-.04	-.31	.02	-.01	.02	-.01	-.13	.04	-.05	-.03

QES Q1 2015

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

Business domestic orders

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	80	36	44	17	62	1	19	61	42	38	24	54	2
	16%	15%	17%	26%	15%	3%	28%	14%	24%	12%	21%	15%	6%	
Same	(0.0)	322	154	168	41	274	7	37	285	114	208	70	242	10
	64%	65%	64%	63%	67%	26%	54%	65%	66%	63%	59%	67%	41%	
Down	(-1.0)	101	47	52	7	76	18	12	89	18	84	23	65	13
	20%	20%	20%	11%	18%	70%	18%	21%	10%	25%	20%	18%	52%	
Mean Score		-.04	-.05	-.03	.15	-.03	-.67	.10	-.07	.14	-.14	.01	-.03	-.46

QES Q1 2015

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

Employment

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	32	22	10	2	30	-	4	9	4	4	5	2	4	9
		6%	5%	18%	3%	7%	-	5%	9%	6%	7%	4%	6%	10%	14%
Same	(0.0)	418	381	37	50	368	14	58	86	55	50	102	22	31	49
		83%	85%	68%	79%	84%	73%	84%	80%	84%	90%	87%	74%	78%	75%
Down	(-1.0)	54	46	8	11	42	5	7	12	6	2	10	6	5	7
		11%	10%	15%	18%	10%	27%	10%	11%	10%	4%	9%	20%	12%	11%
Mean Score		-.04	-.05	.03	-.15	-.03	-.27	-.05	-.03	-.03	.03	-.04	-.14	-.02	.03

QES Q1 2015

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

Employment

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1.0)	32	18	14	17	13	1	19	13	14	18	11	18	2
		6%	7%	5%	26%	3%	6%	28%	3%	8%	5%	10%	5%	8%
Same	(0.0)	418	189	227	38	368	11	40	378	154	264	88	312	18
		83%	80%	86%	59%	89%	43%	58%	87%	89%	80%	75%	86%	74%
Down	(-1.0)	54	30	24	10	30	13	10	44	6	48	18	32	4
		11%	13%	9%	15%	7%	51%	14%	10%	3%	15%	15%	9%	18%
Mean Score		-.04	-.05	-.04	.11	-.04	-.45	.14	-.07	.05	-.09	-.05	-.04	-.11

QES Q1 2015

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

Cashflow

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	105	87	18	14	91	3	15	26	19	10	16	7	9	17
		21%	19%	32%	23%	21%	13%	22%	25%	28%	19%	14%	23%	22%	26%
Same	(0.0)	254	224	31	32	222	8	38	42	31	33	68	14	21	25
		51%	50%	56%	51%	51%	42%	54%	39%	47%	61%	58%	48%	53%	38%
Down	(-1.0)	144	137	6	17	127	9	17	39	16	11	33	9	10	24
		29%	31%	12%	27%	29%	44%	24%	37%	24%	21%	28%	29%	25%	36%
Mean Score		-.08	-.11	.21	-.04	-.08	-.31	-.02	-.12	.04	-.02	-.14	-.06	-.04	-.10

QES Q1 2015

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

Cashflow

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	105	47	58	20	82	3	21	84	48	57	27	76	2
		21%	20%	22%	30%	20%	11%	31%	19%	28%	17%	23%	21%	9%
Same	(0.0)	254	117	138	32	216	6	27	228	104	151	52	191	11
		51%	49%	52%	49%	53%	24%	39%	52%	60%	46%	44%	53%	46%
Down	(-1.0)	144	73	69	13	113	17	21	123	22	122	39	94	11
		29%	31%	26%	20%	27%	65%	30%	28%	12%	37%	33%	26%	45%
Mean Score		-.08	-.11	-.04	.10	-.07	-.55	.01	-.09	.15	-.20	-.10	-.05	-.37

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Summary table

Base: All respondents

	Total	Up	Same	Down	My business does not export outside the UK	Mean score
Business export orders	503 100%	36 7%	117 23%	29 6%	320 64%	.04
Export sales	503 100%	34 7%	119 24%	26 5%	324 64%	.04

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Export sales

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	34	26	8	-	34	-	1	13	5	4	6	2	4	10
		7%	6%	14%	-	8%	-	1%	12%	7%	8%	5%	8%	10%	15%
Same	(0.0)	119	100	19	23	95	10	18	25	18	9	23	7	9	17
		24%	22%	34%	37%	22%	49%	25%	24%	28%	16%	20%	23%	23%	27%
Down	(-1.0)	26	22	4	2	24	2	*	10	4	2	6	*	2	8
		5%	5%	8%	3%	5%	11%	*	9%	6%	3%	5%	1%	4%	12%
My business does not export outside the UK		324	300	24	38	286	8	51	60	39	41	82	20	25	31
		64%	67%	44%	60%	65%	40%	73%	55%	60%	73%	70%	68%	63%	47%
Mean Score		.04	.03	.12	-.09	.06	-.18	.01	.06	.03	.17	-.02	.20	.16	.06

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Export sales

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1.0)	34	16	18	11	22	1	16	19	19	15	7	27	*
		7%	7%	7%	17%	5%	5%	23%	4%	11%	4%	6%	8%	1%
Same	(0.0)	119	61	57	19	94	6	20	98	37	82	28	85	5
		24%	26%	22%	29%	23%	21%	30%	23%	21%	25%	24%	24%	19%
Down	(-1.0)	26	10	16	6	14	6	6	20	5	21	10	13	3
		5%	4%	6%	9%	3%	23%	9%	5%	3%	6%	9%	4%	11%
My business does not export outside the UK		324	149	174	29	282	14	26	298	112	212	72	236	16
		64%	63%	66%	44%	68%	52%	39%	69%	65%	64%	61%	65%	68%
Mean Score		.04	.07	.02	.14	.06	-.37	.22	-.01	.23	-.06	-.08	.11	-.32

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business export orders

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	36	31	6	-	36	-	*	11	10	2	7	2	3	8
		7%	7%	10%	-	8%	-	*	11%	15%	4%	6%	8%	8%	13%
Same	(0.0)	117	97	20	23	94	10	19	23	13	12	25	7	10	18
		23%	22%	37%	37%	21%	49%	27%	21%	20%	21%	21%	23%	25%	28%
Down	(-1.0)	29	24	5	4	25	4	*	9	5	2	5	*	3	7
		6%	5%	9%	7%	6%	22%	*	8%	8%	4%	4%	1%	7%	10%
My business does not export outside the UK		320	296	24	36	284	6	50	64	37	39	80	20	24	32
		64%	66%	44%	56%	65%	29%	72%	60%	57%	71%	69%	68%	60%	49%
Mean Score		.04	.04	.02	-.16	.07	-.31	-	.06	.15	.02	.06	.20	.03	.05

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business export orders

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1.0)	36	17	19	12	23	1	12	24	19	17	5	31	-
		7%	7%	7%	18%	6%	5%	18%	6%	11%	5%	4%	9%	-
Same	(0.0)	117	63	54	18	94	5	22	95	39	79	30	85	3
		23%	27%	20%	28%	23%	19%	33%	22%	22%	24%	25%	23%	12%
Down	(-1.0)	29	10	20	5	18	7	8	22	6	24	8	16	5
		6%	4%	7%	7%	4%	25%	11%	5%	3%	7%	7%	4%	20%
My business does not export outside the UK		320	147	172	30	276	14	26	294	110	210	74	230	16
		64%	62%	65%	46%	67%	52%	39%	68%	64%	64%	63%	63%	68%
Mean Score		.04	.08	*	.20	.04	-.42	.11	.02	.21	-.05	-.07	.11	-.61

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Summary table

Base: All who export

	Total	Up	Same	Down	My business does not export outside the UK	Mean score
Business export orders	183	36	117	29	-	.04
	100%	20%	64%	16%	-	
Export sales	179	34	119	26	-	.04
	100%	19%	66%	15%	-	

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Export sales

Base: All who export

	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	195	115	80	12	183	7	13	39	22	32	38	11	33	29	
Weighted Total	179	148	31	25	153	12	19	48	26	15	35	9	15	35	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	34	26	8	-	34	-	1	13	5	4	6	2	4	10
		19%	18%	26%	-	22%	-	3%	27%	17%	29%	16%	25%	27%	28%
Same	(0.0)	119	100	19	23	95	10	18	25	18	9	23	7	9	17
		66%	67%	60%	91%	62%	82%	95%	53%	69%	58%	66%	71%	62%	50%
Down	(-1.0)	26	22	4	2	24	2	*	10	4	2	6	*	2	8
		15%	15%	14%	9%	16%	18%	2%	20%	14%	13%	18%	4%	11%	22%
Mean Score		.04	.03	.12	-.09	.06	-.18	.01	.06	.03	.17	-.02	.20	.16	.06

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Export sales

Base: All who export

		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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		195	115	80	52	128	15	62	133	73	122	43	144	8
Weighted Total		179	88	91	36	130	13	42	137	61	118	45	126	8
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1.0)	34	16	18	11	22	1	16	19	19	15	7	27	*
		19%	19%	19%	31%	17%	10%	37%	14%	32%	13%	15%	22%	4%
Same	(0.0)	119	61	57	19	94	6	20	98	37	82	28	85	5
		66%	70%	63%	52%	72%	44%	48%	72%	60%	69%	63%	68%	60%
Down	(-1.0)	26	10	16	6	14	6	6	20	5	21	10	13	3
		15%	11%	18%	17%	11%	47%	15%	15%	8%	18%	23%	10%	36%
Mean Score		.04	.07	.02	.14	.06	-.37	.22	-.01	.23	-.06	-.08	.11	-.32

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business export orders

Base: All who export

	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	201	121	80	13	188	8	14	37	23	34	39	11	35	28	
Weighted Total	183	152	31	28	155	14	19	43	28	16	37	9	16	34	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1.0)	36	31	6	-	36	-	*	11	10	2	7	2	3	8
		20%	20%	18%	-	23%	-	2%	26%	34%	15%	20%	25%	20%	25%
Same	(0.0)	117	97	20	23	94	10	19	23	13	12	25	7	10	18
		64%	64%	66%	84%	61%	69%	97%	53%	47%	72%	67%	71%	63%	55%
Down	(-1.0)	29	24	5	4	25	4	*	9	5	2	5	*	3	7
		16%	16%	16%	16%	16%	31%	2%	21%	19%	13%	14%	4%	17%	20%
Mean Score		.04	.04	.02	-.16	.07	-.31	-	.06	.15	.02	.06	.20	.03	.05

QES Q1 2015

Q2 Excluding seasonality, how have the last three months compared to the previous three months in terms of:

Business export orders

Base: All who export

		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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		201	120	81	51	135	15	62	139	75	126	44	149	8
Weighted Total		183	90	93	35	135	13	42	141	63	120	43	132	8
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1.0)	36	17	19	12	23	1	12	24	19	17	5	31	-
		20%	19%	21%	34%	17%	10%	29%	17%	30%	14%	12%	24%	-
Same	(0.0)	117	63	54	18	94	5	22	95	39	79	30	85	3
		64%	70%	58%	53%	70%	38%	53%	67%	61%	66%	69%	64%	39%
Down	(-1.0)	29	10	20	5	18	7	8	22	6	24	8	16	5
		16%	11%	21%	13%	13%	52%	18%	15%	9%	20%	19%	12%	61%
Mean Score		.04	.08	*	.20	.04	-.42	.11	.02	.21	-.05	-.07	.11	-.61

QES Q1 2015

Q3 How do you expect your workforce size to change over the next three months?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1.0)	65	45	20	15	50	*	16	10	9	8	10	6	4	7
		13%	10%	36%	23%	11%	2%	23%	10%	14%	15%	9%	22%	9%	10%
Stay the same	(0.0)	412	384	28	43	369	19	45	87	54	46	103	23	35	51
		82%	86%	51%	67%	84%	98%	65%	81%	83%	82%	88%	78%	89%	78%
Fall	(-1.0)	26	20	7	6	20	-	8	10	2	1	4	-	1	8
		5%	4%	12%	10%	5%	-	12%	9%	3%	2%	3%	-	2%	12%
Mean Score		.08	.06	.24	.13	.07	.02	.12	*	.10	.13	.05	.22	.07	-.01

QES Q1 2015

Q3 How do you expect your workforce size to change over the next three months?

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1.0)	65	39	26	65	-	-	29	36	24	41	37	26	2
		13%	16%	10%	100%	-	-	42%	8%	14%	12%	32%	7%	8%
Stay the same	(0.0)	412	186	224	-	412	-	35	377	145	267	66	325	21
		82%	78%	85%	-	100%	-	51%	87%	84%	81%	56%	90%	88%
Fall	(-1.0)	26	12	14	-	-	26	5	21	4	23	14	11	1
		5%	5%	5%	-	-	100%	7%	5%	2%	7%	12%	3%	4%
Mean Score	.08	.11	.05	1.00	-	-1.00	.35	.03	.12	.05	.20	.04	.03	

QES Q1 2015

Q4 Have you tried to recruit in the past three months?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	68	45	23	11	57	1	13	22	7	5	9	6	5	14
	14%	10%	42%	17%	13%	8%	18%	20%	11%	9%	8%	22%	12%	21%
No	435	403	32	52	382	18	57	86	58	50	108	23	35	51
	86%	90%	58%	83%	87%	92%	82%	80%	89%	91%	92%	78%	88%	79%

QES Q1 2015

Q4 Have you tried to recruit in the past three months?

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	68	37	32	29	35	5	68	-	31	38	27	40	1
	14%	15%	12%	44%	8%	19%	100%	-	18%	11%	23%	11%	3%
No	435	200	233	36	377	21	-	435	142	292	90	321	23
	86%	85%	88%	56%	92%	81%	-	100%	82%	89%	77%	89%	97%

QES Q1 2015

Q5 Were the jobs...

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

	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	91	34	57	6	85	2	10	19	8	13	14	11	14	13
Weighted Total	68	45	23	11	57	1	13	22	7	5	9	6	5	14
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full-time	47	32	15	7	40	*	8	18	4	4	6	3	3	11
	69%	71%	65%	59%	70%	32%	62%	83%	64%	76%	68%	42%	67%	79%
Part-time	20	13	7	2	19	-	2	4	4	1	3	4	2	3
	29%	29%	30%	14%	32%	-	17%	19%	54%	21%	29%	64%	42%	21%
Permanent	19	14	5	*	19	*	-	5	5	2	2	4	1	4
	28%	32%	22%	4%	33%	32%	-	21%	78%	40%	24%	60%	16%	28%
Temporary	18	8	9	6	11	1	7	2	2	2	3	*	*	2
	26%	19%	40%	59%	20%	68%	53%	12%	30%	35%	32%	6%	5%	11%

QES Q1 2015

Q5 Were the jobs...

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

	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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	91	59	32	45	43	3	91	-	45	46	26	63	2
Weighted Total	68	37	32	29	35	5	68	-	31	38	27	40	1
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Full-time	47	27	20	21	21	5	47	-	26	21	20	27	1
	69%	74%	62%	72%	62%	100%	69%	-	84%	56%	72%	66%	100%
Part-time	20	6	14	8	11	1	20	-	6	14	6	14	-
	29%	17%	43%	29%	32%	14%	29%	-	20%	37%	21%	35%	-
Permanent	19	8	11	7	10	2	19	-	7	12	4	15	-
	28%	23%	35%	25%	29%	47%	28%	-	24%	33%	16%	37%	-
Temporary	18	11	7	7	10	1	18	-	5	13	7	11	*
	26%	29%	22%	26%	28%	14%	26%	-	15%	35%	25%	26%	47%

QES Q1 2015

Q6 Did you meet any difficulties in recruiting?

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

	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	91	34	57	6	85	2	10	19	8	13	14	11	14	13
Weighted Total	68	45	23	11	57	1	13	22	7	5	9	6	5	14
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	37	26	11	3	34	1	4	16	2	2	6	2	3	10
	54%	59%	46%	27%	59%	68%	36%	74%	34%	48%	59%	37%	57%	75%
No	31	19	13	8	23	*	8	6	5	3	4	4	2	3
	46%	41%	54%	73%	41%	32%	64%	26%	66%	52%	41%	63%	43%	25%

QES Q1 2015

Q6 Did you meet any difficulties in recruiting?

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

	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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	91	59	32	45	43	3	91	-	45	46	26	63	2
Weighted Total	68	37	32	29	35	5	68	-	31	38	27	40	1
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Yes	37	20	17	19	15	3	37	-	13	24	16	21	*
	54%	56%	52%	65%	43%	67%	54%	-	42%	64%	57%	52%	47%
No	31	16	15	10	20	2	31	-	18	14	12	19	*
	46%	44%	48%	35%	57%	33%	46%	-	58%	36%	43%	48%	53%

QES Q1 2015

Q7 In which category did you have difficulties?

Base: All who had difficulties in recruiting

	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	48	22	26	2	46	1	5	13	3	5	8	5	8	10
Weighted Total	37	26	11	3	34	1	4	16	2	2	6	2	3	10
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Skilled manual/ technical	19	12	6	2	17	-	3	7	2	-	5	1	*	6
	51%	47%	60%	66%	49%	-	72%	43%	87%	-	88%	59%	8%	60%
Professional/ managerial	12	7	4	-	12	-	*	7	*	1	1	1	1	2
	32%	28%	42%	-	35%	-	7%	45%	13%	56%	12%	21%	54%	15%
Clerical	9	6	4	2	7	-	4	3	*	*	1	*	1	1
	25%	21%	33%	66%	21%	-	93%	17%	13%	12%	11%	20%	19%	12%
Un/ semi-skilled	4	4	*	1	3	1	-	1	-	1	-	-	1	1
	10%	13%	2%	34%	8%	100%	-	9%	-	31%	-	-	19%	14%

QES Q1 2015

Q7 In which category did you have difficulties?

Base: All who had difficulties in recruiting

	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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	48	31	17	25	21	2	48	-	21	27	15	32	1
Weighted Total	37	20	17	19	15	3	37	-	13	24	16	21	*
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Skilled manual/ technical	19	11	8	11	5	3	19	-	10	9	8	11	-
	51%	53%	48%	58%	31%	100%	51%	-	76%	37%	51%	51%	-
Professional/ managerial	12	7	5	6	5	1	12	-	2	9	6	6	*
	32%	33%	30%	34%	32%	21%	32%	-	19%	39%	36%	28%	100%
Clerical	9	5	4	4	5	-	9	-	3	6	4	6	-
	25%	25%	24%	20%	36%	-	25%	-	22%	26%	23%	27%	-
Un/ semi-skilled	4	1	2	1	3	-	4	-	*	4	1	3	-
	10%	7%	13%	4%	20%	-	10%	-	1%	15%	8%	12%	-

QES Q1 2015

Q8 How have your investment plans changed over the past three months?

Summary table

Base: All respondents

	Total	Increased	Same	Decreased	Mean score
Plant and equipment	503 100%	56 11%	384 76%	63 13%	-.01
Training	503 100%	42 8%	411 82%	50 10%	-.02

QES Q1 2015

Q8 How have your investment plans changed over the past three months?

Plant and equipment

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased	(1.0)	56	40	16	13	43	3	13	9	8	6	7	5	5	7
		11%	9%	29%	20%	10%	15%	19%	9%	12%	12%	6%	16%	13%	10%
Same	(0.0)	384	351	34	44	340	10	51	72	52	45	99	24	31	46
		76%	78%	61%	69%	77%	49%	74%	67%	80%	82%	85%	81%	77%	70%
Decreased	(-1.0)	63	58	5	7	56	7	5	26	5	4	11	1	4	13
		13%	13%	10%	11%	13%	36%	7%	24%	8%	7%	9%	3%	10%	20%
Mean Score		-.01	-.04	.19	.09	-.03	-.20	.12	-.15	.04	.05	-.04	.13	.03	-.09

QES Q1 2015

Q8 How have your investment plans changed over the past three months?

Plant and equipment

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased	(1.0)	56	27	29	19	36	2	17	39	22	34	18	35	3
		11%	11%	11%	29%	9%	6%	25%	9%	13%	10%	15%	10%	12%
Same	(0.0)	384	181	203	39	333	12	41	343	143	242	81	289	14
		76%	76%	77%	60%	81%	48%	61%	79%	82%	73%	69%	80%	58%
Decreased	(-1.0)	63	29	32	7	44	12	10	53	8	55	18	37	7
		13%	12%	12%	11%	11%	46%	14%	12%	5%	17%	16%	10%	30%
Mean Score		-.01	-.01	-.01	.18	-.02	-.40	.11	-.03	.08	-.06	*	-.01	-.17

QES Q1 2015

Q8 How have your investment plans changed over the past three months?

Training

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased	(1.0)	42	29	12	9	33	1	8	5	5	5	12	4	2	3
		8%	7%	23%	14%	7%	8%	11%	5%	7%	9%	10%	14%	5%	5%
Same	(0.0)	411	373	38	50	361	14	57	79	58	45	99	25	35	50
		82%	83%	70%	79%	82%	70%	82%	73%	89%	81%	85%	85%	88%	77%
Decreased	(-1.0)	50	46	4	4	46	4	5	24	2	6	6	*	3	12
		10%	10%	8%	7%	10%	22%	7%	22%	3%	11%	5%	2%	7%	18%
Mean Score		-.02	-.04	.15	.07	-.03	-.15	.04	-.18	.04	-.02	.05	.12	-.01	-.13

QES Q1 2015

Q8 How have your investment plans changed over the past three months?

Training

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased	(1.0)	42	18	22	20	21	*	19	23	23	19	18	19	5
		8%	8%	8%	31%	5%	1%	27%	5%	13%	6%	15%	5%	20%
Same	(0.0)	411	194	218	39	359	14	40	371	146	265	81	316	14
		82%	82%	82%	59%	87%	53%	59%	85%	84%	80%	69%	87%	58%
Decreased	(-1.0)	50	25	25	6	32	12	10	40	4	46	18	26	5
		10%	11%	9%	9%	8%	46%	14%	9%	2%	14%	16%	7%	22%
Mean Score		-.02	-.03	-.01	.22	-.03	-.44	.13	-.04	.11	-.08	*	-.02	-.02

QES Q1 2015

Q9 Over the next twelve months what do you think will happen to your...

Summary table

Base: All respondents

	Total	Increase	Stay the same	Decrease	Mean score
Turnover	503 100%	195 39%	206 41%	102 20%	.19
Profitability	503 100%	189 38%	211 42%	103 20%	.17

QES Q1 2015

Q9 Over the next twelve months what do you think will happen to your...

Turnover

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1.0)	195	164	31	37	158	13	34	49	25	21	23	13	18	32
		39%	37%	57%	58%	36%	67%	49%	45%	39%	37%	19%	45%	45%	50%
Stay the same	(0.0)	206	188	18	16	190	4	23	40	25	25	63	9	16	18
		41%	42%	32%	25%	43%	22%	34%	37%	38%	45%	54%	32%	41%	28%
Decrease	(-1.0)	102	96	6	10	91	2	12	19	15	10	31	7	6	15
		20%	21%	11%	16%	21%	11%	17%	18%	24%	18%	27%	23%	14%	23%
Mean Score		.19	.15	.46	.42	.15	.56	.32	.28	.15	.20	-.07	.22	.31	.27

QES Q1 2015

Q9 Over the next twelve months what do you think will happen to your...

Turnover

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1.0)	195	80	116	50	142	3	40	156	77	119	67	122	6
		39%	34%	44%	78%	34%	12%	58%	36%	44%	36%	57%	34%	27%
Stay the same	(0.0)	206	106	100	12	189	5	19	187	84	122	29	174	3
		41%	45%	38%	18%	46%	20%	27%	43%	48%	37%	25%	48%	12%
Decrease	(-1.0)	102	51	49	2	82	18	10	92	13	89	21	66	15
		20%	22%	19%	4%	20%	67%	15%	21%	7%	27%	18%	18%	62%
Mean Score		.19	.12	.25	.74	.15	-.55	.43	.15	.37	.09	.40	.15	-.35

QES Q1 2015

Q9 Over the next twelve months what do you think will happen to your...

Profitability

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1.0)	189	162	27	31	158	9	34	44	27	20	27	11	17	28
		38%	36%	50%	48%	36%	45%	49%	41%	41%	36%	23%	38%	42%	43%
Stay the same	(0.0)	211	189	22	20	191	6	22	44	25	27	56	14	17	26
		42%	42%	40%	32%	43%	33%	31%	41%	38%	49%	48%	47%	44%	39%
Decrease	(-1.0)	103	97	6	13	90	4	14	19	14	8	34	4	6	12
		20%	22%	10%	20%	21%	22%	20%	18%	21%	15%	29%	14%	14%	18%
Mean Score		.17	.14	.40	.29	.15	.23	.29	.23	.20	.21	-.05	.24	.28	.25

QES Q1 2015

Q9 Over the next twelve months what do you think will happen to your...

Profitability

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1.0)	189	80	109	50	137	2	37	151	76	113	65	121	3
		38%	34%	41%	76%	33%	8%	55%	35%	44%	34%	56%	33%	11%
Stay the same	(0.0)	211	104	108	12	192	7	21	190	86	125	28	176	7
		42%	44%	41%	19%	47%	27%	30%	44%	50%	38%	24%	49%	31%
Decrease	(-1.0)	103	54	48	3	83	17	10	93	11	92	24	65	14
		20%	23%	18%	5%	20%	65%	15%	21%	6%	28%	20%	18%	58%
Mean Score		.17	.11	.23	.71	.13	-.57	.40	.14	.37	.07	.35	.16	-.47

QES Q1 2015

Q10 Are you operating at...

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full capacity	173	151	23	11	163	3	21	37	22	21	40	12	16	21
	34%	34%	41%	17%	37%	16%	31%	35%	34%	39%	35%	40%	40%	33%
Below full capacity	330	298	32	53	277	16	48	70	43	34	77	18	24	44
	66%	66%	59%	83%	63%	84%	69%	65%	66%	61%	65%	60%	60%	67%

QES Q1 2015

Q10 Are you operating at...

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full capacity	173	87	86	24	145	4	31	142	173	-	45	123	6
	34%	37%	33%	37%	35%	14%	45%	33%	100%	-	38%	34%	23%
Below full capacity	330	150	179	41	267	23	38	292	-	330	72	239	19
	66%	63%	67%	63%	65%	86%	55%	67%	-	100%	62%	66%	77%

QES Q1 2015

Q11 Over the next three months do you expect the price of your goods/ services to:

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Rise	(1.0)	117	96	21	33	84	5	32	34	11	8	14	5	7	22
		23%	21%	39%	52%	19%	24%	47%	32%	17%	14%	12%	17%	18%	34%
Stay the same	(0.0)	362	330	32	26	336	10	37	69	51	44	96	24	30	43
		72%	74%	58%	41%	76%	53%	53%	64%	78%	80%	82%	83%	76%	66%
Fall	(-1.0)	24	22	2	4	20	4	*	4	3	3	6	-	3	*
		5%	5%	4%	7%	5%	22%	*	4%	5%	6%	5%	-	7%	1%
Mean Score		.18	.17	.35	.46	.15	.02	.46	.28	.12	.09	.07	.17	.11	.33

QES Q1 2015

Q11 Over the next three months do you expect the price of your goods/ services to:

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Rise	(1.0)	117	56	61	37	66	14	27	90	45	72	117	-	-
		23%	24%	23%	58%	16%	54%	40%	21%	26%	22%	100%	-	-
Stay the same	(0.0)	362	172	189	26	325	11	40	321	123	239	-	362	-
		72%	72%	71%	40%	79%	42%	59%	74%	71%	72%	-	100%	-
Fall	(-1.0)	24	9	15	2	21	1	1	23	6	19	-	-	24
		5%	4%	6%	3%	5%	4%	1%	5%	3%	6%	-	-	100%
Mean Score		.18	.20	.18	.55	.11	.50	.39	.15	.23	.16	1.00	-	-1.00

QES Q1 2015

Q12 Is your business under any pressure to raise prices from any of the following?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Raw material prices	102	87	14	31	71	13	20	36	6	2	11	11	3	33
	20%	19%	26%	49%	16%	66%	28%	33%	9%	4%	9%	38%	8%	50%
Finance costs	81	69	12	25	56	4	25	17	10	8	9	4	4	14
	16%	15%	22%	39%	13%	22%	36%	16%	15%	15%	7%	14%	10%	21%
Pay settlements	57	46	11	9	48	5	5	16	8	7	9	2	4	10
	11%	10%	20%	15%	11%	27%	8%	15%	12%	13%	8%	8%	10%	16%
Other overheads	176	155	21	27	149	5	29	35	26	16	45	11	9	24
	35%	35%	38%	43%	34%	27%	42%	33%	39%	29%	38%	37%	23%	37%
Not Stated	212	198	14	7	206	3	17	37	33	32	61	8	22	15
	42%	44%	26%	10%	47%	13%	25%	35%	50%	57%	52%	27%	55%	23%

QES Q1 2015

Q12 Is your business under any pressure to raise prices from any of the following?

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Raw material prices	102	25	76	17	75	10	31	71	30	71	41	56	5
	20%	11%	29%	26%	18%	38%	45%	16%	17%	22%	35%	15%	19%
Finance costs	81	33	48	25	44	12	19	62	25	56	38	37	6
	16%	14%	18%	39%	11%	47%	27%	14%	14%	17%	32%	10%	25%
Pay settlements	57	27	30	17	34	5	15	42	20	37	20	34	3
	11%	11%	11%	27%	8%	20%	22%	10%	11%	11%	17%	9%	13%
Other overheads	176	82	93	34	131	11	27	149	47	130	61	104	11
	35%	35%	35%	53%	32%	43%	40%	34%	27%	39%	52%	29%	45%
Not Stated	212	109	103	10	198	4	13	200	85	127	23	183	6
	42%	46%	39%	16%	48%	16%	18%	46%	49%	39%	20%	51%	24%

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Summary table

Base: All respondents

	Total					Nets		Mean score	
		Increased significantly	Increased slightly	Stayed the same	Decreased slightly	Decreased significantly	Increased		Decreased
Pressure from employees to increase wages	503 100%	31 6%	102 20%	362 72%	7 1%	1 *	133 26%	8 2%	.31
Cost of my business's energy	503 100%	23 5%	96 19%	317 63%	65 13%	2 *	119 24%	67 13%	.15
Cost of raw materials (sourced domestically)	503 100%	9 2%	95 19%	383 76%	15 3%	2 *	104 21%	16 3%	.19
Cost of raw materials (sourced internationally)	503 100%	16 3%	69 14%	397 79%	16 3%	4 1%	85 17%	21 4%	.15
Cost of borrowing	503 100%	12 2%	48 9%	430 85%	11 2%	2 *	59 12%	14 3%	.11
Cost of fuel	503 100%	11 2%	47 9%	214 42%	210 42%	22 4%	58 11%	232 46%	-.37

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Pressure from employees to increase wages

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased significantly	(2.0)	31	26	5	13	18	4	9	6	6	2	*	2	1	2
		6%	6%	9%	20%	4%	22%	13%	5%	10%	4%	*	8%	1%	2%
Increased slightly	(1.0)	102	80	22	24	78	2	28	22	11	7	19	8	7	9
		20%	18%	41%	37%	18%	9%	40%	20%	17%	13%	16%	27%	17%	13%
Stayed the same	(0.0)	362	335	27	25	337	11	31	78	48	45	98	19	32	54
		72%	75%	49%	39%	77%	58%	45%	72%	73%	81%	84%	65%	82%	82%
Decreased slightly	(-1.0)	7	6	1	2	4	2	1	2	-	1	*	-	-	-
		1%	1%	1%	3%	1%	11%	2%	1%	-	2%	*	-	-	-
Decreased significantly	(-2.0)	1	1	-	-	1	-	-	1	-	-	-	-	-	1
		*	*	-	-	*	-	-	1%	-	-	-	-	-	2%
Nets															
Increased		133	106	27	36	97	6	37	27	17	9	19	10	7	10
		26%	24%	50%	57%	22%	31%	53%	25%	27%	16%	16%	35%	18%	16%
Decreased		8	7	1	2	6	2	1	3	-	1	*	-	-	1
		2%	2%	1%	3%	1%	11%	2%	3%	-	2%	*	-	-	2%
Mean Score		.31	.27	.57	.74	.25	.42	.64	.27	.36	.18	.16	.44	.20	.14

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Pressure from employees to increase wages

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2.0)	31	13	18	11	14	6	9	22	7	24	14	13	4
		6%	5%	7%	17%	3%	21%	12%	5%	4%	7%	12%	4%	16%
Increased slightly	(1.0)	102	55	47	26	69	8	26	76	41	62	41	58	3
		20%	23%	18%	40%	17%	29%	39%	17%	23%	19%	35%	16%	14%
Stayed the same	(0.0)	362	166	195	27	324	12	32	331	125	237	61	285	16
		72%	70%	74%	41%	79%	44%	46%	76%	72%	72%	52%	79%	67%
Decreased slightly	(-1.0)	7	3	4	1	5	*	2	5	1	6	1	5	1
		1%	1%	1%	1%	1%	1%	3%	1%	*	2%	1%	1%	3%
Decreased significantly	(-2.0)	1	-	1	-	-	1	-	1	-	1	-	1	-
		*	-	*	-	-	5%	-	*	-	*	-	*	-
Nets														
Increased		133	68	65	37	83	13	35	98	47	86	56	70	7
		26%	29%	24%	57%	20%	50%	51%	23%	27%	26%	47%	19%	29%
Decreased		8	3	5	1	5	1	2	6	1	7	1	6	1
		2%	1%	2%	1%	1%	6%	3%	1%	*	2%	1%	2%	3%
Mean Score		.31	.33	.29	.73	.22	.61	.61	.26	.31	.31	.59	.21	.42

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of borrowing

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2.0)	12	10	2	-	12	-	5	2	*	1	3	-	5
		2%	2%	4%	-	3%	-	4%	4%	1%	1%	10%	-	7%
Increased slightly	(1.0)	48	38	10	8	40	-	11	18	2	5	7	3	1
		9%	8%	18%	13%	9%	-	16%	16%	4%	10%	6%	10%	3%
Stayed the same	(0.0)	430	391	39	55	375	20	56	82	60	47	109	20	37
		85%	87%	71%	87%	85%	100%	81%	76%	92%	85%	93%	68%	92%
Decreased slightly	(-1.0)	11	8	3	-	11	-	2	4	-	2	*	3	1
		2%	2%	6%	-	3%	-	3%	3%	-	4%	*	9%	2%
Decreased significantly	(-2.0)	2	2	1	-	2	-	-	-	-	1	-	1	1
		*	*	1%	-	1%	-	-	-	-	1%	-	2%	3%
Nets														
Increased		59	47	12	8	51	-	11	22	5	6	8	6	1
		12%	11%	22%	13%	12%	-	16%	21%	8%	10%	7%	21%	3%
Decreased		14	10	4	-	14	-	2	4	-	3	*	3	2
		3%	2%	7%	-	3%	-	3%	3%	-	5%	*	11%	5%
Mean Score		.11	.10	.19	.13	.11	-	.14	.22	.11	.04	.08	.18	-.04

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of borrowing

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased significantly	(2.0)	12	4	8	4	5	3	5	7	5	7	6	6	-
		2%	2%	3%	6%	1%	10%	7%	2%	3%	2%	5%	2%	-
Increased slightly	(1.0)	48	16	32	14	30	4	7	40	11	36	19	24	5
		9%	7%	12%	21%	7%	16%	10%	9%	7%	11%	16%	7%	19%
Stayed the same	(0.0)	430	209	219	45	366	18	55	375	153	277	90	322	18
		85%	88%	83%	69%	89%	70%	80%	86%	88%	84%	77%	89%	74%
Decreased slightly	(-1.0)	11	7	4	2	8	1	1	11	2	9	2	9	1
		2%	3%	2%	3%	2%	3%	1%	2%	1%	3%	1%	2%	4%
Decreased significantly	(-2.0)	2	1	1	-	2	-	1	2	2	1	1	1	1
		*	*	*	-	1%	-	1%	*	1%	*	*	*	2%
Nets														
Increased		59	20	40	18	35	7	12	47	16	43	25	30	5
		12%	8%	15%	27%	8%	27%	18%	11%	9%	13%	21%	8%	19%
Decreased		14	8	6	2	11	1	1	12	4	10	2	10	2
		3%	3%	2%	3%	3%	3%	2%	3%	2%	3%	2%	3%	6%
Mean Score		.11	.06	.15	.30	.07	.34	.23	.09	.09	.12	.24	.07	.10

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of my business's energy

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased significantly	(2.0)	23	19	4	19	-	4	5	1	3	3	5	2	5	
		5%	4%	7%	6%	4%	-	6%	4%	1%	6%	3%	18%	4%	7%
Increased slightly	(1.0)	96	84	12	15	81	7	14	16	17	13	16	7	7	8
		19%	19%	22%	24%	18%	36%	20%	15%	26%	23%	14%	23%	18%	12%
Stayed the same	(0.0)	317	285	32	42	275	10	42	73	35	33	86	12	25	51
		63%	64%	58%	66%	63%	52%	60%	68%	54%	61%	74%	41%	63%	77%
Decreased slightly	(-1.0)	65	57	8	3	62	3	9	14	10	6	12	5	6	2
		13%	13%	14%	4%	14%	13%	13%	13%	16%	10%	10%	17%	15%	4%
Decreased significantly	(-2.0)	2	2	-	-	2	-	-	2	-	-	*	-	-	
		*	*	-	-	*	-	-	3%	-	-	2%	-	-	
Nets															
Increased		119	104	16	19	100	7	18	21	18	16	19	12	9	12
		24%	23%	29%	30%	23%	36%	26%	19%	27%	29%	17%	40%	22%	19%
Decreased		67	59	8	3	64	3	9	14	12	6	12	5	6	2
		13%	13%	14%	4%	15%	13%	13%	13%	19%	10%	10%	19%	15%	4%
Mean Score		.15	.14	.22	.33	.12	.23	.19	.10	.08	.24	.09	.38	.11	.22

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of my business's energy

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2.0)	23	5	18	3	17	3	5	18	5	18	6	16	1
		5%	2%	7%	5%	4%	12%	7%	4%	3%	5%	6%	4%	4%
Increased slightly	(1.0)	96	53	43	21	72	3	24	73	36	60	32	60	4
		19%	22%	16%	32%	18%	11%	34%	17%	21%	18%	27%	17%	16%
Stayed the same	(0.0)	317	139	176	37	261	20	34	283	114	203	68	236	13
		63%	59%	67%	56%	63%	75%	50%	65%	66%	62%	58%	65%	55%
Decreased slightly	(-1.0)	65	39	26	4	60	1	6	59	17	48	11	48	6
		13%	16%	10%	7%	15%	2%	8%	14%	10%	15%	9%	13%	25%
Decreased significantly	(-2.0)	2	*	2	-	2	-	-	2	*	2	-	2	-
		*	*	1%	-	1%	-	-	*	*	1%	-	1%	-
Nets														
Increased		119	58	61	24	89	6	29	91	42	77	39	76	5
		24%	25%	23%	37%	22%	23%	42%	21%	24%	23%	33%	21%	20%
Decreased		67	39	28	4	62	1	6	61	17	50	11	50	6
		13%	17%	10%	7%	15%	2%	8%	14%	10%	15%	9%	14%	25%
Mean Score		.15	.10	.19	.35	.10	.33	.41	.10	.17	.13	.29	.11	*

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of fuel

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2.0)	11	8	2	-	11	-	3	1	1	2	3	1	3
		2%	2%	4%	-	2%	-	3%	1%	2%	2%	9%	3%	5%
Increased slightly	(1.0)	47	37	10	12	35	-	13	9	8	5	7	2	9
		9%	8%	18%	19%	8%	-	19%	8%	12%	10%	6%	7%	14%
Stayed the same	(0.0)	214	191	23	17	197	7	20	36	31	28	61	19	23
		42%	43%	41%	26%	45%	36%	29%	34%	48%	51%	52%	48%	36%
Decreased slightly	(-1.0)	210	191	18	34	175	13	34	56	24	16	41	15	30
		42%	43%	34%	54%	40%	64%	49%	52%	37%	30%	35%	34%	45%
Decreased significantly	(-2.0)	22	20	2	-	22	-	3	2	4	6	3	3	-
		4%	5%	3%	-	5%	-	2%	3%	8%	5%	10%	7%	-
Nets														
Increased		58	45	12	12	46	-	13	12	8	7	9	5	12
		11%	10%	23%	19%	10%	-	19%	12%	13%	12%	8%	16%	19%
Decreased		232	212	20	34	197	13	36	59	26	21	47	18	30
		46%	47%	36%	54%	45%	64%	52%	55%	40%	37%	40%	45%	45%
Mean Score		-.37	-.40	-.12	-.35	-.37	-.64	-.35	-.42	-.28	-.31	-.35	-.30	-.21

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of fuel

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2.0)	11	3	8	3	5	3	4	7	3	8	6	5	-
		2%	1%	3%	4%	1%	11%	6%	2%	2%	2%	5%	1%	-
Increased slightly	(1.0)	47	23	24	13	34	*	13	34	19	27	23	22	1
		9%	10%	9%	19%	8%	2%	18%	8%	11%	8%	20%	6%	5%
Stayed the same	(0.0)	214	118	95	26	180	7	21	192	87	126	38	164	11
		42%	50%	36%	41%	44%	26%	31%	44%	50%	38%	33%	45%	46%
Decreased slightly	(-1.0)	210	85	124	22	172	16	27	182	56	154	47	154	9
		42%	36%	47%	34%	42%	59%	40%	42%	32%	47%	41%	43%	35%
Decreased significantly	(-2.0)	22	8	13	1	20	1	3	19	8	14	2	17	3
		4%	3%	5%	2%	5%	2%	4%	4%	5%	4%	2%	5%	13%
Nets														
Increased		58	26	32	15	39	3	17	41	22	35	29	27	1
		11%	11%	12%	23%	10%	13%	25%	9%	13%	11%	25%	7%	5%
Decreased		232	93	137	23	192	16	30	202	64	168	50	170	12
		46%	39%	52%	36%	47%	62%	44%	46%	37%	51%	42%	47%	48%
Mean Score		-0.37	-0.30	-0.42	-0.10	-0.41	-0.40	-0.17	-0.40	-0.27	-0.42	-0.14	-0.43	-0.56

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced domestically)

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased significantly	(2.0)	9	6	3	-	9	-	-	4	1	*	1	3	1	4
		2%	1%	6%	-	2%	-	-	4%	1%	1%	*	9%	3%	6%
Increased slightly	(1.0)	95	81	14	27	67	3	29	27	7	2	13	10	4	18
		19%	18%	25%	43%	15%	15%	41%	25%	10%	3%	12%	35%	11%	28%
Stayed the same	(0.0)	383	349	34	32	350	15	39	73	57	49	101	15	33	43
		76%	78%	61%	51%	80%	77%	56%	68%	88%	88%	86%	53%	83%	65%
Decreased slightly	(-1.0)	15	10	4	3	11	1	2	3	*	4	2	1	1	-
		3%	2%	8%	5%	3%	8%	3%	3%	1%	7%	2%	2%	2%	-
Decreased significantly	(-2.0)	2	2	-	-	2	-	-	-	-	1	-	*	1	-
		*	*	-	-	*	-	-	-	-	1%	-	2%	1%	-
Nets															
Increased		104	87	17	27	77	3	29	31	7	2	14	13	6	23
		21%	19%	31%	43%	17%	15%	41%	29%	11%	4%	12%	43%	14%	35%
Decreased		16	12	4	3	13	1	2	3	*	4	2	1	1	-
		3%	3%	8%	5%	3%	8%	3%	3%	1%	8%	2%	4%	3%	-
Mean Score		.19	.18	.28	.38	.16	.08	.38	.29	.12	-.05	.11	.47	.12	.41

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced domestically)

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2.0)	9	3	6	3	3	3	5	4	3	6	6	3	1
		2%	1%	2%	4%	1%	13%	8%	1%	2%	2%	5%	1%	4%
Increased slightly	(1.0)	95	33	61	20	65	10	21	74	33	61	49	41	5
		19%	14%	23%	30%	16%	39%	31%	17%	19%	19%	41%	11%	19%
Stayed the same	(0.0)	383	191	190	40	333	10	40	342	131	251	58	310	14
		76%	81%	72%	61%	81%	37%	59%	79%	76%	76%	50%	86%	60%
Decreased slightly	(-1.0)	15	8	7	3	9	3	2	13	4	11	4	7	4
		3%	3%	3%	4%	2%	11%	3%	3%	2%	3%	4%	2%	15%
Decreased significantly	(-2.0)	2	1	1	-	2	-	-	2	1	1	-	1	1
		*	*	*	-	*	-	-	*	1%	*	-	*	2%
Nets														
Increased		104	37	67	22	68	14	27	78	36	68	54	44	6
		21%	16%	25%	35%	16%	53%	39%	18%	21%	21%	46%	12%	23%
Decreased		16	9	8	3	11	3	2	14	5	11	4	8	4
		3%	4%	3%	4%	3%	11%	3%	3%	3%	3%	4%	2%	17%
Mean Score		.19	.13	.24	.35	.14	.55	.44	.15	.19	.19	.48	.10	.07

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced internationally)

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased significantly	(2.0)	16	12	3	-	16	-	-	9	1	1	2	2	1	9
		3%	3%	6%	-	4%	-	-	8%	1%	2%	2%	7%	2%	14%
Increased slightly	(1.0)	69	59	11	18	51	2	18	21	3	2	10	9	3	19
		14%	13%	19%	29%	12%	11%	27%	19%	5%	4%	9%	32%	7%	30%
Stayed the same	(0.0)	397	362	35	34	363	13	45	77	60	48	103	17	34	37
		79%	81%	64%	54%	83%	64%	65%	72%	92%	87%	88%	57%	86%	56%
Decreased slightly	(-1.0)	16	11	5	9	8	3	6	-	*	3	2	1	1	-
		3%	3%	9%	14%	2%	13%	9%	-	1%	6%	2%	2%	4%	-
Decreased significantly	(-2.0)	4	4	*	2	2	2	-	-	*	1	-	*	1	-
		1%	1%	1%	3%	*	11%	-	-	1%	1%	-	2%	1%	-
Nets															
Increased		85	71	14	18	67	2	18	30	4	3	13	11	4	29
		17%	16%	26%	29%	15%	11%	27%	28%	6%	5%	11%	39%	9%	44%
Decreased		21	15	5	11	10	5	6	-	1	4	2	1	2	-
		4%	3%	10%	17%	2%	24%	9%	-	1%	7%	2%	4%	5%	-
Mean Score		.15	.14	.21	.08	.16	-.24	.18	.36	.06	-.02	.11	.40	.05	.58

QES Q1 2015

Q13 Please indicate the extent to which the following have varied in the past 3 months.

Cost of raw materials (sourced internationally)

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total		503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total		503	237	265	65	412	26	68	435	173	330	117	362	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2.0)	16	5	11	4	7	5	6	10	4	12	10	5	1
		3%	2%	4%	7%	2%	18%	9%	2%	2%	3%	8%	1%	4%
Increased slightly	(1.0)	69	25	45	18	45	6	14	55	18	51	33	37	*
		14%	10%	17%	27%	11%	24%	21%	13%	10%	16%	28%	10%	1%
Stayed the same	(0.0)	397	199	197	40	345	12	44	353	143	254	65	314	18
		79%	84%	74%	62%	84%	46%	64%	81%	83%	77%	55%	87%	75%
Decreased slightly	(-1.0)	16	8	9	2	11	3	5	12	6	10	10	4	2
		3%	3%	3%	3%	3%	12%	7%	3%	4%	3%	9%	1%	9%
Decreased significantly	(-2.0)	4	1	3	*	4	-	-	4	1	3	-	2	3
		1%	*	1%	1%	1%	-	-	1%	1%	1%	-	*	11%
Nets														
Increased		85	29	56	22	52	11	20	65	22	63	42	42	1
		17%	12%	21%	34%	13%	42%	29%	15%	13%	19%	36%	12%	5%
Decreased		21	9	12	3	15	3	5	16	8	13	10	6	5
		4%	4%	5%	4%	4%	12%	7%	4%	4%	4%	9%	2%	20%
Mean Score		.15	.10	.19	.36	.10	.48	.31	.13	.10	.18	.36	.11	-.23

QES Q1 2015

Q14 Which of the following are more of a concern to your business than they were three months ago?

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Competition	199	178	21	33	166	7	34	46	24	13	46	14	16	28
	40%	40%	38%	52%	38%	38%	49%	43%	36%	23%	39%	46%	39%	43%
Exchange rates	104	91	13	6	98	4	5	33	16	7	21	5	13	28
	21%	20%	24%	10%	22%	22%	8%	31%	24%	12%	18%	19%	32%	43%
Corporate Taxation	104	94	10	19	85	5	26	17	14	12	21	4	4	14
	21%	21%	18%	30%	19%	24%	38%	16%	21%	22%	18%	15%	11%	21%
Business rates	99	88	11	16	83	10	13	28	10	10	17	7	5	16
	20%	20%	20%	26%	19%	52%	19%	26%	15%	18%	14%	24%	12%	25%
Inflation	96	84	12	21	75	3	24	28	9	5	15	6	7	19
	19%	19%	22%	33%	17%	13%	34%	26%	14%	9%	13%	21%	18%	28%
Interest rates	88	77	11	9	79	5	12	24	16	13	12	2	4	15
	18%	17%	20%	14%	18%	24%	18%	22%	24%	23%	11%	8%	11%	23%
Not Stated	88	84	4	2	86	2	4	14	13	15	31	3	5	2
	17%	19%	7%	3%	19%	11%	5%	13%	20%	28%	26%	11%	13%	2%

QES Q1 2015

Q14 Which of the following are more of a concern to your business than they were three months ago?

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Competition	199	91	107	25	164	10	21	178	55	144	53	130	16
	40%	38%	40%	38%	40%	38%	31%	41%	32%	44%	45%	36%	68%
Exchange rates	104	53	51	18	80	6	20	84	30	74	32	69	3
	21%	22%	19%	28%	19%	23%	29%	19%	17%	22%	27%	19%	13%
Corporate Taxation	104	44	60	13	80	11	15	89	40	64	30	69	5
	21%	19%	22%	20%	19%	43%	22%	20%	23%	19%	26%	19%	20%
Business rates	99	54	45	24	71	5	21	78	29	71	30	63	7
	20%	23%	17%	36%	17%	21%	31%	18%	17%	21%	26%	17%	28%
Inflation	96	39	57	16	73	8	24	72	33	63	37	59	*
	19%	16%	22%	24%	18%	29%	35%	17%	19%	19%	31%	16%	1%
Interest rates	88	44	44	18	66	4	14	74	27	62	32	51	5
	18%	19%	17%	28%	16%	16%	20%	17%	15%	19%	27%	14%	22%
Not Stated	88	41	47	6	78	3	7	80	35	53	6	81	*
	17%	17%	18%	9%	19%	13%	11%	19%	20%	16%	5%	22%	1%

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Summary table

Base: All respondents

	Total	Improve	Stay the same	Worsen	Mean score
Unemployment	503 100%	222 44%	228 45%	53 10%	.34
Economic growth	503 100%	218 43%	214 43%	71 14%	.29
Inflation (Improve = Fall / Worsen = Rise)	503 100%	97 19%	321 64%	85 17%	.02
Interest rates (Improve = Fall / Worsen = Rise)	503 100%	32 6%	331 66%	140 28%	-.21

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Economic growth

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	218	189	29	23	195	3	32	51	29	25	51	12	15	30
		43%	42%	53%	37%	44%	18%	46%	47%	44%	46%	44%	42%	37%	46%
Stay the same	(0.0)	214	193	21	34	180	14	32	44	23	23	45	13	20	30
		43%	43%	39%	53%	41%	71%	46%	41%	36%	42%	38%	45%	51%	46%
Worsen	(-1.0)	71	67	4	6	65	2	6	13	13	7	21	4	5	5
		14%	15%	8%	10%	15%	11%	9%	12%	20%	12%	18%	13%	12%	8%
Mean Score		.29	.27	.45	.27	.30	.07	.37	.35	.23	.33	.26	.29	.25	.37

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Economic growth

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	218	106	112	41	168	8	23	194	78	140	57	158	3
		43%	45%	42%	64%	41%	32%	34%	45%	45%	42%	49%	44%	12%
Stay the same	(0.0)	214	91	121	19	189	6	30	184	82	132	43	156	16
		43%	39%	46%	29%	46%	24%	44%	42%	47%	40%	37%	43%	65%
Worsen	(-1.0)	71	40	31	5	55	12	15	56	13	58	17	49	5
		14%	17%	12%	7%	13%	44%	22%	13%	7%	18%	14%	13%	23%
Mean Score		.29	.28	.31	.56	.28	-.12	.13	.32	.38	.25	.34	.30	-.10

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Inflation (Improve = Fall / Worsen = Rise)

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	97	84	13	15	82	5	15	11	11	13	25	7	10	11
		19%	19%	23%	24%	19%	24%	22%	10%	17%	23%	21%	22%	26%	16%
Stay the same	(0.0)	321	292	29	41	280	15	42	81	42	32	74	16	21	42
		64%	65%	52%	64%	64%	76%	60%	75%	64%	57%	63%	56%	53%	65%
Worsen	(-1.0)	85	72	13	8	78	-	12	16	13	11	18	6	9	12
		17%	16%	25%	12%	18%	-	17%	15%	19%	20%	16%	22%	22%	19%
Mean Score		.02	.03	-.02	.12	.01	.24	.05	-.05	-.02	.03	.06	.01	.04	-.02

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Inflation (Improve = Fall / Worsen = Rise)

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	97	47	50	22	70	5	12	85	35	61	26	66	5
	19%	20%	19%	34%	17%	19%	17%	20%	20%	19%	22%	18%	19%	
Stay the same	(0.0)	321	150	170	37	273	12	39	282	109	212	65	238	18
	64%	63%	64%	57%	66%	45%	56%	65%	63%	64%	56%	66%	75%	
Worsen	(-1.0)	85	41	45	6	69	9	18	67	29	56	26	58	1
	17%	17%	17%	10%	17%	36%	26%	15%	17%	17%	22%	16%	6%	
Mean Score	.02	.03	.02	.24	*	-.17	-.09	.04	.04	.01	*	.02	.13	

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Interest rates (Improve = Fall / Worsen = Rise)

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	32	28	4	-	32	-	3	8	1	6	8	3	3	8
		6%	6%	7%	-	7%	-	5%	7%	2%	11%	7%	9%	8%	12%
Stay the same	(0.0)	331	294	37	55	276	17	55	59	42	32	82	18	26	34
		66%	66%	68%	86%	63%	87%	80%	54%	64%	58%	70%	60%	65%	52%
Worsen	(-1.0)	140	126	14	9	131	3	11	41	22	17	26	9	11	24
		28%	28%	25%	14%	30%	13%	16%	38%	34%	31%	22%	31%	27%	37%
Mean Score		-.21	-.22	-.18	-.14	-.23	-.13	-.11	-.31	-.32	-.20	-.15	-.22	-.19	-.25

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Interest rates (Improve = Fall / Worsen = Rise)

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	32	19	13	8	23	1	5	27	13	20	10	20	2
	6%	8%	5%	13%	5%	5%	8%	6%	7%	6%	8%	6%	8%	
Stay the same	(0.0)	331	154	177	41	273	17	42	289	116	215	69	245	17
	66%	65%	67%	63%	66%	64%	61%	67%	67%	65%	59%	68%	71%	
Worsen	(-1.0)	140	65	74	16	116	8	21	119	45	95	39	96	5
	28%	27%	28%	24%	28%	31%	31%	27%	26%	29%	33%	27%	22%	
Mean Score		-21	-19	-23	-12	-23	-27	-23	-21	-19	-23	-25	-21	-14

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Unemployment

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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	222	199	23	20	202	9	22	48	33	27	57	10	16	29
		44%	44%	42%	32%	46%	45%	32%	44%	50%	49%	49%	36%	40%	44%
Stay the same	(0.0)	228	201	28	35	194	11	39	55	22	22	50	13	18	34
		45%	45%	50%	55%	44%	55%	56%	51%	34%	39%	42%	43%	46%	52%
Worsen	(-1.0)	53	49	4	8	44	-	8	5	10	6	11	6	6	2
		10%	11%	7%	13%	10%	-	12%	5%	16%	11%	9%	21%	14%	4%
Mean Score		.34	.34	.35	.19	.36	.45	.21	.39	.34	.38	.40	.15	.26	.40

QES Q1 2015

Q15 What do you expect to happen to the following UK economic indicators over the next twelve months?

Unemployment

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	222	108	114	35	179	7	26	196	81	142	54	161	7
		44%	46%	43%	55%	44%	28%	39%	45%	47%	43%	46%	44%	31%
Stay the same	(0.0)	228	105	121	23	189	16	34	194	77	151	52	164	12
		45%	44%	46%	36%	46%	62%	50%	45%	45%	46%	44%	45%	49%
Worsen	(-1.0)	53	23	30	6	44	3	8	45	15	37	11	36	5
		10%	10%	11%	9%	11%	11%	11%	10%	9%	11%	10%	10%	20%
Mean Score		.34	.36	.32	.45	.33	.17	.27	.35	.38	.32	.36	.34	.10

QES Q1 2015

Q16 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

Summary table

Base: All respondents

	Total	Improve	Stay the same	Worsen	Mean score
London	503 100%	231 46%	234 47%	38 8%	.38
Company	503 100%	177 35%	268 53%	58 12%	.24

QES Q1 2015

Q16 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

London

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	231	203	28	32	199	11	36	52	35	29	35	18	16	30
		46%	45%	52%	51%	45%	54%	52%	48%	54%	52%	30%	62%	40%	47%
Stay the same	(0.0)	234	212	22	29	205	7	32	50	22	23	68	11	21	31
		47%	47%	41%	45%	47%	35%	47%	46%	34%	42%	58%	36%	52%	48%
Worsen	(-1.0)	38	34	4	2	36	2	1	6	8	3	13	*	3	3
		8%	7%	8%	3%	8%	11%	1%	5%	13%	6%	11%	2%	8%	5%
Mean Score		.38	.38	.44	.48	.37	.43	.51	.43	.41	.46	.19	.61	.31	.41

QES Q1 2015

Q16 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

London

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	231	108	124	42	181	9	40	192	86	145	65	157	9
		46%	45%	47%	64%	44%	33%	58%	44%	50%	44%	56%	43%	37%
Stay the same	(0.0)	234	109	123	21	202	11	23	211	80	154	44	181	9
		47%	46%	47%	33%	49%	43%	34%	48%	46%	47%	38%	50%	37%
Worsen	(-1.0)	38	20	18	2	30	6	5	32	8	30	7	24	6
		8%	9%	7%	3%	7%	24%	8%	7%	4%	9%	6%	7%	27%
Mean Score		.38	.37	.40	.62	.37	.09	.50	.37	.45	.35	.49	.37	.10

QES Q1 2015

Q16 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

Company

Base: All respondents

	Business size			Industry											
	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	503	371	132	26	477	12	49	76	46	93	105	38	84	52	
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	177	148	29	37	140	7	41	41	22	18	23	11	14	26
		35%	33%	52%	58%	32%	34%	59%	39%	34%	32%	19%	38%	34%	40%
Stay the same	(0.0)	268	246	22	22	245	9	25	57	33	31	75	15	21	35
		53%	55%	39%	35%	56%	44%	36%	53%	50%	57%	64%	53%	54%	53%
Worsen	(-1.0)	58	54	4	4	54	4	3	9	10	6	19	3	5	4
		12%	12%	8%	7%	12%	22%	4%	8%	15%	11%	17%	9%	12%	7%
Mean Score		.24	.21	.44	.51	.20	.12	.55	.31	.19	.22	.03	.30	.23	.34

QES Q1 2015

Q16 Over the next twelve months what do you expect to happen to the economic prospects for London and your company?

Company

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 recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1.0)	177	77	100	51	119	7	42	135	70	107	64	109	4
		35%	33%	38%	79%	29%	27%	61%	31%	41%	32%	55%	30%	15%
Stay the same	(0.0)	268	128	138	12	248	7	20	248	95	172	40	220	7
		53%	54%	52%	19%	60%	28%	29%	57%	55%	52%	34%	61%	29%
Worsen	(-1.0)	58	32	27	2	45	12	7	52	7	51	13	32	13
		12%	13%	10%	3%	11%	46%	10%	12%	4%	15%	11%	9%	55%
Mean Score		.24	.19	.28	.76	.18	-.19	.51	.19	.36	.17	.44	.21	-.40