

LCCI – QES Q2 2015

METHODOLOGY NOTE

ComRes interviewed 510 London business decision makers online between 7th and 20th May 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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QES Q2 2015

1. In the last 12 months, to what extent, if at all, have your business operations in London been negatively affected by slow internet connection speeds? Please rate on a scale from 1-5 where 1 = not affected at all and 5 = affected a great deal. Base: All respondents	1
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3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each. Mobile-friendly company website Base: All whose business does not currently have Mobile-friendly company website	12
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3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each. Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails) Base: All whose business does not currently have Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)	27
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4. What proportion of your business sales, if any, are made through an online payment system (including PayPal, WorldPay and online tools for credit / debit card payments, but excluding manually typed emails)? Base: All who make sales online	33
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QES Q2 2015

1. In the last 12 months, to what extent, if at all, have your business operations in London been negatively affected by slow internet connection speeds? Please rate on a scale from 1-5 where 1 = not affected at all and 5 = affected a great deal.

Base: All respondents

	Business size			Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale		
Total	a	b	a	b	c	d	e	f	g	h	i	j	k		
	A	B	A	B	C	D	E	F	G	H	I	J	K		
Significance Level: 90%															
Significance Level: 95%															
Unweighted Total	510	378	132	33	477	16	64	81	59	71	88	52	79	51	
Weighted Total	510	454	56	63	447	19	70	109	66	56	119	30	40	66	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Not affected at all	(1.0)	148	137	11	23	125	7	21	30	18	16	40	9	8	16
		29%	30%	20%	36%	28%	39%	30%	28%	27%	28%	33%	29%	19%	25%
		B	j	j	j					J					
	(2.0)	66	61	5	6	60	2	10	7	8	10	19	5	5	4
		13%	13%	9%	9%	13%	9%	14%	7%	11%	18%	16%	16%	13%	5%
		e			e					EK	ek	ek			
	(3.0)	94	81	13	9	85	2	12	27	11	10	16	7	9	16
		18%	18%	24%	14%	19%	10%	17%	25%	17%	17%	13%	25%	23%	25%
		h			h			h				h		h	
	(4.0)	116	102	14	11	105	2	16	33	14	11	26	6	9	23
		23%	22%	26%	18%	24%	10%	22%	30%	20%	19%	22%	21%	23%	35%
		abc	bc	gh	abc	bc	gh	abc	bc	gh	abc	bc	gh	abc	bc
Affected a great deal	(5.0)	66	57	9	13	53	6	9	8	15	6	12	3	7	6
		13%	13%	16%	21%	12%	32%	13%	7%	22%	11%	10%	9%	18%	9%
		E	BdEGHIK		E					BEghik				E	
Don't know		20	17	3	1	18	-	3	4	1	3	6	-	2	1
		4%	4%	6%	2%	4%	-	4%	4%	2%	5%	5%	-	5%	1%
		i	i		i					i	i			i	

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

1. In the last 12 months, to what extent, if at all, have your business operations in London been negatively affected by slow internet connection speeds? Please rate on a scale from 1-5 where 1 = not affected at all and 5 = affected a great deal.

Base: All respondents

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	510	378	132	33	477	16	64	81	59	71	88	52	79	51
Weighted Total	510	454	56	63	447	19	70	109	66	56	119	30	40	66
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Nets														
Not affected	214	197	16	29	185	9	31	37	25	26	59	13	13	20
	42%	43%	29%	45%	41%	48%	44%	34%	38%	46%	49%	45%	31%	30%
		B			j					jk	EJK			
Affected	182	159	23	24	158	8	25	40	28	17	38	9	16	29
	36%	35%	41%	38%	35%	42%	35%	37%	43%	31%	32%	30%	41%	44%
Mean Score	2.77	2.73	3.08	2.77	2.77	2.86	2.73	2.82	3.00	2.66	2.58	2.64	3.09	2.98
			A										bgHi	

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

1. In the last 12 months, to what extent, if at all, have your business operations in London been negatively affected by slow internet connection speeds? Please rate on a scale from 1-5 where 1 = not affected at all and 5 = affected a great deal.

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 try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c	
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C	
Unweighted Total	510	286	223	95	395	20	127	383	231	279	92	397	21	
Weighted Total	510	282	227	75	420	15	101	409	226	284	90	400	20	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Not affected at all	(1.0)	148	74	74	11	134	3	15	132	58	90	39	105	3
		29%	26%	32%	15%	32%	20%	15%	32%	26%	32%	43%	26%	17%
					A			A			BC			
	(2.0)	66	32	34	8	57	1	14	52	27	39	6	56	3
		13%	11%	15%	10%	13%	10%	14%	13%	12%	14%	7%	14%	16%
												a		
	(3.0)	94	55	38	19	70	5	17	77	45	49	11	78	5
		18%	20%	17%	25%	17%	36%	17%	19%	20%	17%	12%	20%	26%
					b		B					a		a
	(4.0)	116	68	48	16	98	2	28	88	47	69	17	96	4
		23%	24%	21%	22%	23%	14%	28%	22%	21%	24%	18%	24%	21%
Affected a great deal	(5.0)	66	38	28	19	44	3	22	44	37	29	11	54	2
		13%	13%	12%	26%	10%	21%	21%	11%	16%	10%	12%	13%	8%
					B			B		B				
Don't know		20	15	5	2	18	-	5	15	12	8	7	11	2
		4%	5%	2%	2%	4%	-	5%	4%	5%	3%	7%	3%	12%
												B		B
Nets														
Not affected		214	106	107	19	191	4	29	184	85	129	45	162	7
		42%	38%	47%	25%	45%	29%	29%	45%	38%	45%	51%	40%	33%
				A		A		A			a	b		
Affected		182	106	77	35	142	5	50	133	84	98	27	149	6
		36%	38%	34%	47%	34%	35%	49%	32%	37%	35%	30%	37%	29%
					B			B						
Mean Score		2.77	2.86	2.66	3.34	2.65	3.07	3.28	2.65	2.90	2.67	2.44	2.84	2.86
					B			B		b		A		

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

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2. Which of the following online facilities, if any, does your business currently have? Please select all that apply.

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
	a	b		a	b	c	d	e	f	g	h	i	j	k
	A	B		A	B	C	D	E	F	G	H	I	J	K
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	510	378	132	33	477	16	64	81	59	71	88	52	79	51
Weighted Total	510	454	56	63	447	19	70	109	66	56	119	30	40	66
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Company website	318	267	51	40	278	14	38	65	49	35	68	18	29	42
	62%	59%	92%	63%	62%	74%	54%	60%	74%	63%	58%	61%	73%	63%
			A						bDeH				bDeH	
Company LinkedIn page	149	131	19	14	135	7	11	26	29	17	42	8	9	11
	29%	29%	34%	23%	30%	39%	15%	24%	44%	31%	35%	27%	22%	17%
					Dk	Dk			ABDEiJK	Dk	DjK			
Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)	138	121	18	19	120	7	17	41	18	9	24	10	12	32
	27%	27%	32%	29%	27%	39%	24%	37%	27%	16%	20%	34%	30%	48%
					g	G		bdGH				Gh	g	aBDFGHJ
Company Facebook profile	138	110	28	21	117	9	15	39	21	7	18	9	20	28
	27%	24%	50%	33%	26%	49%	21%	36%	31%	13%	15%	29%	50%	43%
			A	GH	GH	BDGH		bdGH	GH			GH	BDeFGHI	BDGH
Company Twitter profile	132	108	24	20	111	9	13	28	22	9	27	6	17	16
	26%	24%	43%	32%	25%	47%	18%	26%	33%	17%	23%	21%	42%	24%
			A	g		BDeGHIk			dG				BDEGHIK	

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

2. Which of the following online facilities, if any, does your business currently have? Please select all that apply.

Base: All respondents

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	510	378	132	33	477	16	64	81	59	71	88	52	79	51
Weighted Total	510	454	56	63	447	19	70	109	66	56	119	30	40	66
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mobile-friendly company website	112	92	20	11	101	7	9	25	19	14	21	6	11	17
	22%	20%	36%	18%	23%	37%	13%	23%	28%	24%	18%	20%	28%	25%
			A		d	Dh		D		d			D	d
Company mobile app	23	17	6	1	21	-	2	7	5	3	5	*	2	5
	4%	4%	11%	2%	5%	-	3%	6%	7%	5%	4%	1%	4%	7%
			A											
None of the above	120	119	1	13	107	5	18	22	6	18	40	7	6	9
	24%	26%	2%	21%	24%	26%	25%	20%	9%	32%	33%	23%	15%	14%
		B		f	Fj	f	F	f		eFJK	beFJK	F		
Don't know	5	5	-	-	5	-	1	2	1	-	-	1	-	-
	1%	1%	-	-	1%	-	1%	2%	2%	-	-	3%	-	-
												hj		
Net: Any social media	242	206	36	27	215	10	23	55	41	21	55	15	24	33
	47%	45%	65%	42%	48%	51%	32%	50%	61%	37%	46%	49%	60%	49%
			A		Dg		Dg	abDGh		d	d	d	aBDGh	d
Base: All who have a company website	318	267	51	40	278	14	38	65	49	35	68	18	29	42
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mobile-friendly company website	112	92	20	11	101	7	9	25	19	14	21	6	11	17
	35%	34%	39%	28%	36%	50%	24%	38%	38%	38%	31%	32%	39%	40%
					d									

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

2. Which of the following online facilities, if any, does your business currently have? Please select all that apply.

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	510	286	223	95	395	20	127	383	231	279	92	397	21
Weighted Total	510	282	227	75	420	15	101	409	226	284	90	400	20
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Company website	318	178	140	67	237	15	88	230	137	181	55	255	8
	62%	63%	62%	90%	56%	96%	87%	56%	61%	64%	61%	64%	39%
				B		B	B				c	C	
Company LinkedIn page	149	87	63	28	115	7	30	119	65	85	23	122	5
	29%	31%	28%	38%	27%	45%	30%	29%	29%	30%	25%	30%	25%
				B		b							
Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)	138	72	66	29	105	4	32	107	63	76	26	103	9
	27%	26%	29%	39%	25%	26%	32%	26%	28%	27%	29%	26%	45%
				B		b							b
Company Facebook profile	138	76	61	33	99	6	40	98	53	85	31	102	4
	27%	27%	27%	44%	24%	37%	39%	24%	23%	30%	35%	26%	19%
				B			B			a	b		
Company Twitter profile	132	86	45	35	89	7	41	91	57	74	32	97	2
	26%	31%	20%	47%	21%	49%	40%	22%	25%	26%	35%	24%	12%
		B		B		B	B				BC		
Mobile-friendly company website	112	58	54	29	81	3	30	82	46	65	20	87	5
	22%	20%	24%	38%	19%	18%	30%	20%	21%	23%	23%	22%	24%
				Bc			B						
Company mobile app	23	12	11	11	11	*	11	12	14	9	4	18	1
	4%	4%	5%	15%	3%	3%	11%	3%	6%	3%	4%	5%	3%
				B			B						
None of the above	120	67	54	3	117	1	3	117	54	66	19	95	6
	24%	24%	24%	4%	28%	4%	3%	29%	24%	23%	21%	24%	30%
					AC			A					

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

2. Which of the following online facilities, if any, does your business currently have? Please select all that apply.

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	510	286	223	95	395	20	127	383	231	279	92	397	21
Weighted Total	510	282	227	75	420	15	101	409	226	284	90	400	20
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Don't know	5	5	1	-	5	-	2	3	5	-	2	3	-
	1%	2%	*	-	1%	-	2%	1%	2%	-	3%	1%	-
									B				
Net: Any social media	242	135	107	48	184	10	58	184	102	140	45	190	8
	47%	48%	47%	65%	44%	67%	58%	45%	45%	49%	50%	47%	38%
				B		B	B						
Base: All who have a company website	318	178	140	67	237	15	88	230	137	181	55	255	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mobile-friendly company website	112	58	54	29	81	3	30	82	46	65	20	87	5
	35%	32%	39%	43%	34%	18%	34%	36%	34%	36%	37%	34%	63%
				C									b

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Summary table

Base: All whose business does not currently use the following online facilities

	Company website	Mobile-friendly company website	Company Twitter profile	Company Facebook profile	Company LinkedIn page	Company mobile app	Online payment system for sales	Any social media
Unweighted Total	161	379	364	343	356	482	363	450
Weighted Total	192	398	378	372	361	487	372	459
	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	84	211	245	260	194	300	243	310
	44%	53%	65%	70%	54%	62%	65%	67%
Lack of staff with the right skills	27	44	34	30	42	49	22	50
	14%	11%	9%	8%	12%	10%	6%	11%
Lack of awareness or understanding	11	30	26	17	42	26	20	52
	6%	8%	7%	4%	12%	5%	5%	11%
Concern over online crime	4	13	8	7	8	10	16	15
	2%	3%	2%	2%	2%	2%	4%	3%
The fast changing pace of technology	5	22	12	7	7	17	6	19
	3%	6%	3%	2%	2%	4%	2%	4%
Cost of setting up	53	61	9	6	10	59	39	14
	28%	15%	2%	2%	3%	12%	10%	3%
Poor broadband speed or connectivity	9	7	5	2	4	2	2	6
	5%	2%	1%	1%	1%	*	*	1%
None of these	27	48	55	55	67	58	47	61
	14%	12%	15%	15%	19%	12%	13%	13%

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company website

Base: All whose business does not currently have Company website

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	161	152	9	8	153	3	28	26	13	21	32	18	20	15
Weighted Total	192	188	4	23	169	5	32	44	17	21	50	12	11	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	84	83	*	6	78	2	14	10	11	12	28	4	4	4
	44%	44%	9%	25%	46%	33%	43%	22%	65%	57%	55%	31%	40%	15%
		B			EK		k		aEiK	EK	EK			
Cost of setting up	53	53	-	12	41	3	10	13	1	4	15	3	3	9
	28%	28%	-	50%	25%	67%	30%	29%	8%	19%	30%	27%	30%	37%
		b		F		bFg								f
Lack of staff with the right skills	27	26	*	7	19	3	4	9	-	3	4	1	3	7
	14%	14%	7%	32%	11%	67%	13%	20%	-	14%	7%	9%	25%	27%
				bFh		BDeFGHI		f					bfh	bfh
Lack of awareness or understanding	11	10	1	-	11	-	-	7	*	1	2	-	1	3
	6%	5%	20%	-	6%	-	-	15%	2%	5%	3%	-	10%	12%
		a						Di					d	d
Poor broadband speed or connectivity	9	9	-	-	9	-	-	6	-	-	2	1	1	2
	5%	5%	-	-	5%	-	-	14%	-	-	3%	9%	5%	9%
								Dg						
The fast changing pace of technology	5	4	1	3	2	2	1	2	-	-	-	-	-	2
	3%	2%	33%	13%	1%	33%	5%	5%	-	-	-	-	-	9%
		A		BgH		BdFGHIJ								Bh

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company website

Base: All whose business does not currently have Company website

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	161	152	9	8	153	3	28	26	13	21	32	18	20	15
Weighted Total	192	188	4	23	169	5	32	44	17	21	50	12	11	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Concern over online crime	4	4	-	-	4	-	-	1	-	-	2	1	-	-
	2%	2%	-	-	2%	-	-	3%	-	-	3%	9%	-	-
None of these	27	25	1	-	27	-	3	11	4	2	4	2	1	5
	14%	14%	31%	-	16%	-	10%	25%	24%	10%	7%	18%	5%	20%

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company website

Base: All whose business does not currently have Company website

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	161	83	78	8	152	1	12	149	73	88	24	126	11
Weighted Total	192	105	87	8	184	1	13	179	89	103	35	145	12
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	84	50	33	1	83	-	3	81	39	45	10	66	8
	44%	48%	38%	15%	45%	-	20%	45%	44%	44%	28%	46%	64%
				a			a				a		a
Cost of setting up	53	25	28	2	51	-	3	50	21	32	12	38	3
	28%	24%	32%	28%	28%	-	24%	28%	24%	31%	35%	26%	27%
Lack of staff with the right skills	27	15	12	4	23	-	3	24	10	17	3	22	2
	14%	14%	13%	50%	12%	-	24%	13%	11%	16%	8%	15%	18%
				B									
Lack of awareness or understanding	11	4	7	*	10	-	1	10	4	7	3	8	-
	6%	4%	8%	5%	6%	-	7%	6%	4%	7%	8%	6%	-
Poor broadband speed or connectivity	9	5	5	-	9	1	-	9	2	8	-	6	3
	5%	4%	5%	-	5%	100%	-	5%	2%	7%	-	4%	23%
													AB
The fast changing pace of technology	5	3	2	-	5	-	1	4	-	5	-	5	-
	3%	3%	3%	-	3%	-	11%	2%	-	5%	-	4%	-
							b			A			
Concern over online crime	4	1	3	-	4	-	-	4	-	4	-	4	-
	2%	1%	4%	-	2%	-	-	2%	-	4%	-	3%	-
										a			
None of these	27	16	11	2	24	-	3	23	18	8	8	18	1
	14%	15%	13%	30%	13%	-	26%	13%	21%	8%	22%	13%	4%
									B				

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Mobile-friendly company website

Base: All whose business does not currently have Mobile-friendly company website

	Business size			Industry										
	1-9	10+		Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Total	a	b		a	b	c	d	e	f	g	h	i	j	k
	A	B		A	B	C	D	E	F	G	H	I	J	K
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	379	296	83	25	354	11	52	58	39	51	70	42	56	35
Weighted Total	398	362	36	52	346	12	61	84	48	43	97	24	29	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	211	198	13	27	185	4	36	29	25	26	65	13	14	13
	53%	55%	37%	52%	53%	31%	59%	34%	52%	62%	67%	54%	48%	26%
		B		K	EK		cEK		eK	cEK	BCEJK	EK	K	
Cost of setting up	61	55	6	8	53	8	4	17	9	5	13	3	2	12
	15%	15%	17%	15%	15%	64%	7%	20%	19%	12%	13%	11%	8%	24%
						ABDEFGH								
						IJK			dj					DJ
Lack of staff with the right skills	44	39	5	8	36	4	4	9	6	6	7	3	4	6
	11%	11%	13%	15%	10%	30%	7%	11%	13%	15%	8%	12%	13%	12%
						BDeH								
Lack of awareness or understanding	30	26	4	6	24	*	7	8	1	4	5	2	2	5
	8%	7%	12%	11%	7%	2%	12%	10%	3%	8%	5%	7%	8%	9%
The fast changing pace of technology	22	18	5	9	14	2	7	8	-	3	1	1	1	7
	6%	5%	13%	17%	4%	14%	12%	10%	-	6%	1%	2%	5%	13%
			A	BFHlj		FH	BFHi	BFH		h				BFHi
Concern over online crime	13	10	2	-	13	-	1	3	-	1	4	2	1	-
	3%	3%	6%	-	4%	-	2%	4%	-	2%	4%	8%	4%	-
												fk		
Poor broadband speed or connectivity	7	6	1	-	7	-	-	4	1	-	*	1	1	-
	2%	2%	2%	-	2%	-	-	4%	1%	-	*	4%	4%	-

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K



QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Mobile-friendly company website

Base: All whose business does not currently have Mobile-friendly company website

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	379	296	83	25	354	11	52	58	39	51	70	42	56	35
Weighted Total	398	362	36	52	346	12	61	84	48	43	97	24	29	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of these	48	44	4	-	48	-	3	19	6	3	10	2	5	11
	12%	12%	11%	-	14%	-	5%	22%	12%	7%	10%	10%	17%	23%
				Ad				AcDGh	a		a		Ad	AcDGh

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Mobile-friendly company website

Base: All whose business does not currently have Mobile-friendly company website

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	379	215	163	59	305	15	83	296	172	207	64	300	15
Weighted Total	398	225	173	46	340	12	71	327	179	219	70	313	15
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	211	122	90	15	191	6	20	191	103	109	29	173	9
	53%	54%	52%	32%	56%	49%	29%	58%	57%	50%	42%	55%	62%
					A			A				a	
Cost of setting up	61	31	29	10	48	3	16	44	21	40	21	34	5
	15%	14%	17%	21%	14%	23%	23%	14%	12%	18%	31%	11%	35%
							B			a	B		B
Lack of staff with the right skills	44	22	21	12	30	2	12	32	19	25	4	37	2
	11%	10%	12%	25%	9%	14%	16%	10%	10%	11%	6%	12%	15%
				B			b						
Lack of awareness or understanding	30	15	15	2	27	1	8	22	5	25	2	28	-
	8%	7%	9%	4%	8%	10%	11%	7%	3%	11%	3%	9%	-
										A			
The fast changing pace of technology	22	16	6	6	16	1	11	11	11	11	5	16	1
	6%	7%	3%	12%	5%	5%	16%	3%	6%	5%	7%	5%	6%
				B			B						
Concern over online crime	13	4	9	2	9	1	2	11	3	10	1	10	2
	3%	2%	5%	4%	3%	9%	3%	3%	2%	4%	1%	3%	12%
			a										Ab
Poor broadband speed or connectivity	7	3	3	-	7	-	1	6	2	5	-	7	-
	2%	2%	2%	-	2%	-	1%	2%	1%	2%	-	2%	-
None of these	48	31	17	8	40	-	10	38	23	25	10	37	1
	12%	14%	10%	17%	12%	-	14%	12%	13%	11%	15%	12%	4%
				c									

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company Twitter profile

Base: All whose business does not currently have Company Twitter profile

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	364	286	78	20	344	9	55	57	38	57	65	38	45	37
Weighted Total	378	346	32	43	335	10	57	81	44	47	92	24	24	51
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	245	229	17	27	218	6	39	34	34	34	68	17	14	22
	65%	66%	53%	64%	65%	57%	68%	43%	77%	73%	74%	71%	59%	44%
		B			EK		EK		EjK	EK	EjK	EK		
Lack of staff with the right skills	34	30	4	6	28	1	7	6	4	4	9	*	3	6
	9%	9%	14%	14%	8%	6%	12%	8%	10%	10%	10%	1%	12%	11%
				i			i						i	i
Lack of awareness or understanding	26	23	3	2	25	2	2	11	*	3	4	1	2	8
	7%	7%	10%	4%	7%	17%	4%	14%	1%	7%	5%	6%	9%	15%
						F		dFh					f	dFh
The fast changing pace of technology	12	10	2	1	11	1	-	9	1	-	-	*	1	4
	3%	3%	6%	2%	3%	7%	-	11%	1%	-	-	2%	5%	8%
						dGH		BDfGHi					h	DGH
Cost of setting up	9	8	1	-	9	-	1	2	-	1	4	-	1	-
	2%	2%	2%	-	3%	-	1%	3%	-	2%	5%	-	2%	-
Concern over online crime	8	7	1	-	8	-	1	3	2	*	*	1	1	1
	2%	2%	3%	-	3%	-	2%	3%	4%	1%	*	6%	2%	3%
											h			
Poor broadband speed or connectivity	5	5	-	-	5	-	-	5	-	-	-	-	-	1
	1%	1%	-	-	1%	-	-	6%	-	-	-	-	-	3%
								Bdgh						

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company Twitter profile

Base: All whose business does not currently have Company Twitter profile

	Business size			Industry										
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	364	286	78	20	344	9	55	57	38	57	65	38	45	37
Weighted Total	378	346	32	43	335	10	57	81	44	47	92	24	24	51
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of these	55	49	6	7	48	2	9	17	3	6	9	3	4	10
	15%	14%	19%	17%	14%	17%	16%	21%	8%	14%	10%	14%	18%	19%
								fh						

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company Twitter profile

Base: All whose business does not currently have Company Twitter profile

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	364	187	176	51	301	12	70	294	164	200	59	289	16
Weighted Total	378	196	182	39	331	8	60	318	168	210	58	302	18
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	245	130	115	24	218	4	32	214	107	138	25	205	15
	65%	67%	63%	60%	66%	49%	53%	67%	64%	66%	44%	68%	87%
								A				A	A
Lack of staff with the right skills	34	19	15	5	27	3	11	23	15	18	8	25	1
	9%	10%	8%	12%	8%	32%	18%	7%	9%	9%	14%	8%	6%
						aB		B					
Lack of awareness or understanding	26	8	19	2	25	-	3	23	6	21	4	23	-
	7%	4%	10%	4%	8%	-	5%	7%	3%	10%	6%	8%	-
			A							A			
The fast changing pace of technology	12	7	5	5	6	1	5	7	5	6	3	9	1
	3%	4%	3%	14%	2%	7%	8%	2%	3%	3%	4%	3%	3%
				B				B					
Cost of setting up	9	3	6	1	7	1	2	7	1	8	3	5	1
	2%	1%	3%	2%	2%	7%	3%	2%	*	4%	5%	2%	3%
										A			
Concern over online crime	8	2	6	1	7	-	*	8	4	5	4	4	1
	2%	1%	3%	3%	2%	-	1%	3%	2%	2%	6%	1%	4%
											B		
Poor broadband speed or connectivity	5	3	1	-	3	1	1	3	3	1	2	3	-
	1%	2%	1%	-	1%	19%	2%	1%	2%	1%	3%	1%	-
						AB							
None of these	55	28	27	5	51	-	9	46	30	25	13	42	1
	15%	14%	15%	12%	15%	-	16%	14%	18%	12%	22%	14%	3%
											c		

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company Facebook profile

Base: All whose business does not currently have Company Facebook profile

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	343	278	65	19	324	8	52	44	40	60	68	33	38	25
Weighted Total	372	345	28	43	330	10	56	70	46	49	101	21	20	38
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	260	241	19	29	231	6	40	34	33	36	80	17	14	19
	70%	70%	68%	68%	70%	58%	71%	49%	72%	74%	79%	83%	71%	49%
					EK		Ek		Ek	EK	EK	EK	Ek	
Lack of staff with the right skills	30	28	2	5	25	1	6	7	5	4	7	-	2	7
	8%	8%	6%	11%	8%	7%	10%	9%	10%	7%	7%	-	11%	17%
				i	i		i	i	i				i	bl
Lack of awareness or understanding	17	16	1	2	15	2	2	7	-	3	2	*	1	3
	4%	5%	4%	4%	5%	17%	3%	11%	-	6%	2%	*	3%	7%
						bdFHI		bFhi						f
Concern over online crime	7	6	1	-	7	-	1	3	-	1	-	1	1	1
	2%	2%	5%	-	2%	-	2%	4%	-	2%	-	5%	5%	4%
								h				h	h	
The fast changing pace of technology	7	6	1	-	7	-	-	2	2	1	2	-	1	2
	2%	2%	3%	-	2%	-	-	3%	4%	1%	2%	-	3%	6%
														d
Cost of setting up	6	5	*	-	6	-	1	-	-	1	4	*	-	-
	2%	1%	2%	-	2%	-	1%	-	-	2%	4%	*	-	-
Poor broadband speed or connectivity	2	1	1	-	2	-	-	2	-	-	-	-	-	1
	1%	*	2%	-	1%	-	-	3%	-	-	-	-	-	1%

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company Facebook profile

Base: All whose business does not currently have Company Facebook profile

	Business size			Industry										
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	343	278	65	19	324	8	52	44	40	60	68	33	38	25
Weighted Total	372	345	28	43	330	10	56	70	46	49	101	21	20	38
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of these	55	50	5	7	48	2	9	17	7	7	9	2	2	6
	15%	15%	19%	17%	15%	17%	16%	25%	14%	14%	9%	11%	11%	15%

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company Facebook profile

Base: All whose business does not currently have Company Facebook profile

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	343	190	152	48	282	13	67	276	162	181	53	275	15
Weighted Total	372	206	166	42	321	9	61	311	173	199	59	297	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	260	148	112	27	226	7	41	219	117	143	32	214	14
	70%	72%	67%	64%	70%	73%	66%	70%	67%	72%	54%	72%	86%
												A	A
Lack of staff with the right skills	30	18	12	5	23	2	10	21	17	13	8	22	1
	8%	9%	7%	13%	7%	21%	16%	7%	10%	7%	13%	7%	3%
						b	B						
Lack of awareness or understanding	17	6	10	1	15	-	2	15	4	12	3	13	-
	4%	3%	6%	3%	5%	-	3%	5%	2%	6%	6%	4%	-
Concern over online crime	7	3	4	*	6	1	1	6	2	5	1	4	1
	2%	1%	2%	1%	2%	6%	2%	2%	1%	3%	2%	1%	8%
													b
The fast changing pace of technology	7	3	4	1	5	1	4	3	2	5	-	6	1
	2%	1%	2%	3%	1%	6%	6%	1%	1%	2%	-	2%	4%
							B						
Cost of setting up	6	*	5	*	5	-	2	4	*	5	3	3	-
	2%	*	3%	1%	2%	-	3%	1%	*	3%	5%	1%	-
			A							a	B		
Poor broadband speed or connectivity	2	-	2	1	1	-	-	2	-	2	-	2	-
	1%	-	1%	1%	*	-	-	1%	-	1%	-	1%	-
None of these	55	31	24	7	48	-	9	47	35	20	14	40	1
	15%	15%	14%	16%	15%	-	14%	15%	20%	10%	24%	14%	3%
									B		Bc		

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company LinkedIn page

Base: All whose business does not currently have Company LinkedIn page

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	356	272	84	24	332	10	52	62	31	48	54	37	62	41
Weighted Total	361	324	37	49	312	11	60	83	37	39	77	22	31	55
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	194	175	19	22	172	7	30	31	27	24	45	11	19	24
	54%	54%	51%	45%	55%	60%	50%	38%	72%	63%	58%	50%	60%	43%
					E			AbdEiK	Ek	E		Ek		
Lack of staff with the right skills	42	37	5	6	36	1	6	13	4	6	10	-	3	13
	12%	12%	14%	13%	12%	5%	11%	16%	11%	15%	12%	-	9%	24%
				I	I		I	I	I	I	I		i	BdIJ
Lack of awareness or understanding	42	37	5	13	29	2	13	12	2	3	4	3	4	3
	12%	11%	14%	27%	9%	17%	22%	15%	5%	8%	5%	12%	12%	6%
				BFGHJK			BFGHK	h						
Cost of setting up	10	10	*	-	10	-	-	5	-	1	2	2	1	2
	3%	3%	1%	-	3%	-	-	6%	-	3%	2%	10%	2%	4%
								d				BDfhj		
Concern over online crime	8	7	1	-	8	-	1	2	-	*	3	*	1	1
	2%	2%	3%	-	3%	-	2%	2%	-	1%	4%	2%	2%	1%
The fast changing pace of technology	7	5	2	1	6	1	1	3	-	*	2	-	1	2
	2%	2%	4%	1%	2%	6%	1%	3%	-	1%	2%	-	2%	4%
Poor broadband speed or connectivity	4	3	1	-	4	-	*	3	*	*	-	-	-	1
	1%	1%	3%	-	1%	-	*	4%	1%	1%	-	-	-	3%

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company LinkedIn page

Base: All whose business does not currently have Company LinkedIn page

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	356	272	84	24	332	10	52	62	31	48	54	37	62	41
Weighted Total	361	324	37	49	312	11	60	83	37	39	77	22	31	55
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of these	67	61	6	7	60	2	9	21	4	6	14	6	5	10
	19%	19%	17%	15%	19%	14%	15%	25%	11%	16%	19%	28%	16%	19%
											f			

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company LinkedIn page

Base: All whose business does not currently have Company LinkedIn page

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	356	194	161	58	287	11	80	276	158	198	66	275	15
Weighted Total	361	195	165	47	306	8	70	290	161	199	67	278	15
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	194	111	83	28	163	3	31	162	87	107	30	155	9
	54%	57%	50%	60%	53%	31%	45%	56%	54%	54%	44%	56%	62%
				c				a				a	
Lack of staff with the right skills	42	24	19	7	32	4	13	29	18	24	11	28	4
	12%	12%	11%	15%	10%	44%	19%	10%	11%	12%	16%	10%	27%
						AB		B					B
Lack of awareness or understanding	42	23	19	3	39	1	11	31	12	30	6	35	1
	12%	12%	12%	6%	13%	8%	16%	11%	8%	15%	9%	13%	4%
										A			
Cost of setting up	10	3	8	-	10	-	2	8	2	9	4	6	-
	3%	1%	5%	-	3%	-	3%	3%	1%	4%	6%	2%	-
			a							a			
Concern over online crime	8	2	6	1	7	-	2	6	3	5	2	6	1
	2%	1%	4%	2%	2%	-	3%	2%	2%	2%	3%	2%	4%
The fast changing pace of technology	7	2	4	1	6	-	1	5	2	5	2	4	1
	2%	1%	3%	2%	2%	-	2%	2%	1%	2%	2%	2%	4%
Poor broadband speed or connectivity	4	2	2	1	2	1	2	2	2	2	1	3	-
	1%	1%	1%	2%	1%	17%	3%	1%	2%	1%	1%	1%	-
						AB		b					
None of these	67	34	33	8	60	-	10	57	37	30	14	52	1
	19%	17%	20%	16%	19%	-	14%	20%	23%	15%	21%	19%	4%
									B				

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company mobile app

Base: All whose business does not currently have Company mobile app

	Business size		Industry										
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Total	a	b	a	b	c	d	e	f	g	h	i	j	k
	A	B	A	B	C	D	E	F	G	H	I	J	K
Significance Level: 90%													
Significance Level: 95%													
Unweighted Total	482	365 117	32 450	16 62	74 55	67 83	50 75	46					
Weighted Total	487	438 49	62 425	19 68	102 62	54 114	29 39	62					
	100%	100% 100%	100% 100%	100% 100%	100% 100%	100% 100%	100% 100%	100%					
It is not relevant to my business	300	279 21	31 269	9 36	47 45	35 83	18 26	25					
	62%	64% 43%	50% 63%	49% 53%	46% 73%	65% 73%	62% 68%	40%					
		B	EK		AcDEK	EK	AbcDEK	eK	adEK				
Cost of setting up	59	52 8	12 47	7 11	17 7	4 6	5 3	11					
	12%	12% 15%	20% 11%	35% 16%	17% 11%	7% 5%	15% 8%	18%					
			gHj	BdFGHiJ	H	gH	h	gH					
Lack of staff with the right skills	49	41 8	7 41	* 9	16 3	5 12	2 2	10					
	10%	9% 16%	12% 10%	2% 13%	16% 5%	10% 10%	7% 4%	16%					
		a		j	fJ			fJ					
Lack of awareness or understanding	26	22 4	2 25	* 4	11 -	4 4	1 2	7					
	5%	5% 8%	3% 6%	2% 6%	10% -	4% 4%	4% 4%	11%					
			f	f	Fh	F		Fh					
The fast changing pace of technology	17	14 4	2 16	* 2	7 2	2 2	* 2	7					
	4%	3% 7%	3% 4%	2% 3%	7% 3%	4% 2%	1% 5%	11%					
		a						BdHI					
Concern over online crime	10	8 2	1 9	1 2	3 *	2 *	1 1	-					
	2%	2% 4%	1% 2%	4% 3%	3% 3%	1% 1%	2% 3%	-					

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company mobile app

Base: All whose business does not currently have Company mobile app

	Business size			Industry										
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	482	365 117	32 450	16 62	74	55	67	83	50	75	46			
Weighted Total	487	438 49	62 425	19 68	102	62	54	114	29	39	62			
	100%	100% 100%	100% 100%	100%	100%	100%	100%	100%	100%	100%	100%	100%		
Poor broadband speed or connectivity	2	1 1	- 2	- -	*	1	-	*	-	1	-			
	*	* 2%	- *	- -	*	1%	-	*	-	1%	-			
		A												
None of these	58	50 8	7 51	2 9	17	5	8	9	4	4	8			
	12%	11% 15%	12% 12%	9% 13%	17%	8%	14%	8%	14%	11%	14%			

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Company mobile app

Base: All whose business does not currently have Company mobile app

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	482	270	211	82	381	19	113	369	215	267	86	376	20
Weighted Total	487	270	217	64	409	15	90	397	212	275	86	382	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	300	165	134	33	258	10	45	255	126	174	41	244	15
	62%	61%	62%	51%	63%	67%	50%	64%	59%	63%	47%	64%	79%
					A			A				A	A
Cost of setting up	59	39	20	12	46	2	19	40	28	32	18	40	1
	12%	14%	9%	19%	11%	14%	21%	10%	13%	12%	21%	10%	7%
		b		b			B				B		
Lack of staff with the right skills	49	29	19	14	32	2	19	29	22	27	8	39	1
	10%	11%	9%	23%	8%	15%	21%	7%	10%	10%	9%	10%	7%
				B			B						
Lack of awareness or understanding	26	9	17	3	24	-	4	23	6	20	4	23	-
	5%	3%	8%	4%	6%	-	4%	6%	3%	7%	4%	6%	-
		A						A					
The fast changing pace of technology	17	7	10	3	14	1	4	14	7	10	3	13	1
	4%	3%	5%	5%	3%	4%	4%	3%	4%	4%	4%	4%	3%
Concern over online crime	10	4	6	2	8	-	1	9	5	5	3	6	1
	2%	1%	3%	3%	2%	-	2%	2%	2%	2%	4%	2%	3%
Poor broadband speed or connectivity	2	1	*	1	1	-	1	1	1	1	*	1	-
	*	1%	*	1%	*	-	1%	*	1%	*	*	*	-
None of these	58	30	28	8	49	1	9	48	33	24	15	42	1
	12%	11%	13%	12%	12%	8%	10%	12%	16%	9%	17%	11%	6%
									B		b		

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)

Base: All whose business does not currently have Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	363	278	85	24	339	11	50	45	44	58	67	33	55	22
Weighted Total	372	334	38	45	327	12	53	68	48	47	95	20	28	35
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	243	222	21	25	218	7	32	37	30	35	73	11	17	19
	65%	67%	55%	56%	67%	63%	60%	55%	63%	74%	77%	58%	61%	55%
Cost of setting up	39	35	4	5	34	1	6	9	7	6	6	2	3	5
	10%	10%	10%	11%	10%	5%	11%	14%	14%	14%	6%	9%	10%	15%
Lack of staff with the right skills	22	19	3	3	18	2	1	6	3	1	5	1	2	3
	6%	6%	7%	8%	6%	17%	3%	9%	6%	2%	6%	5%	8%	8%
Lack of awareness or understanding	20	20	1	6	15	2	5	7	-	1	2	2	1	1
	5%	6%	2%	13%	4%	14%	10%	10%	-	3%	2%	12%	5%	4%
Concern over online crime	16	13	3	*	16	*	1	3	*	3	7	*	1	1
	4%	4%	8%	1%	5%	3%	2%	4%	1%	6%	7%	2%	4%	4%
The fast changing pace of technology	6	6	1	-	6	-	-	3	-	*	3	-	-	2
	2%	2%	2%	-	2%	-	-	4%	-	1%	4%	-	-	7%
Poor broadband speed or connectivity	2	1	1	-	2	-	-	-	1	1	-	-	-	-
	*	*	1%	-	*	-	-	-	1%	2%	-	-	-	-

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)

Base: All whose business does not currently have Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	363	278	85	24	339	11	50	45	44	58	67	33	55	22
Weighted Total	372	334	38	45	327	12	53	68	48	47	95	20	28	35
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of these	47	40	6	6	41	-	9	14	8	6	2	3	5	5
	13%	12%	17%	13%	13%	-	17%	20%	16%	13%	3%	13%	17%	15%
				h	H		H	H	H	H	H	H	H	H

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)

Base: All whose business does not currently have Online payment system for sales (including PayPal, WorldPay and online tools for credit/debit card payments, but excluding manually typed emails)

	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 try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
Significance Level: 90%	a	b	a	b	c	a	b	a	b	a	b	c	
Significance Level: 95%	A	B	A	B	C	A	B	A	B	A	B	C	
Unweighted Total	363	202	160	57	292	14	82	281	165	198	60	290	13
Weighted Total	372	210	161	45	315	11	69	303	163	208	64	296	11
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	243	145	99	29	210	4	36	207	102	141	37	197	9
	65%	69%	61%	63%	67%	40%	53%	68%	63%	68%	57%	67%	85%
					C			A					a
Cost of setting up	39	16	22	4	33	1	12	26	16	22	8	31	-
	10%	8%	14%	10%	10%	13%	18%	9%	10%	11%	12%	10%	-
			a				B						
Lack of staff with the right skills	22	13	8	6	14	2	6	16	10	12	4	17	-
	6%	6%	5%	13%	4%	18%	8%	5%	6%	6%	7%	6%	-
			B		B								
Lack of awareness or understanding	20	11	10	4	16	-	7	13	3	17	1	20	-
	5%	5%	6%	9%	5%	-	10%	4%	2%	8%	1%	7%	-
							B			A		a	
Concern over online crime	16	3	13	1	13	2	3	13	6	10	3	13	-
	4%	2%	8%	3%	4%	19%	4%	4%	4%	5%	5%	4%	-
			A		AB								
The fast changing pace of technology	6	2	5	*	6	-	1	6	2	4	-	6	-
	2%	1%	3%	1%	2%	-	1%	2%	1%	2%	-	2%	-
Poor broadband speed or connectivity	2	1	1	-	2	-	1	1	1	1	-	2	-
	*	*	1%	-	*	-	1%	*	*	*	-	1%	-
None of these	47	25	22	5	40	1	9	38	29	18	13	32	2
	13%	12%	14%	12%	13%	10%	12%	13%	18%	9%	20%	11%	15%
									B		B		

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Any social media

Base: All whose business does not currently have at least one form of company social media

	Business size		Industry										
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Total	a	b	a	b	c	d	e	f	g	h	i	j	k
	A	B	A	B	C	D	E	F	G	H	I	J	K
Significance Level: 90%													
Significance Level: 95%													
Unweighted Total	450	342 108	27 423	11 62	72 47	64 78	46 70	44 44					
Weighted Total	459	413 46	55 404	12 68	99 55	52 110	28 36	59 100%					
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	310	283 26	32 278	7 43	45 44	42 84	20 24	27 67%					
	67%	69% 58%	58% 69%	61% 63%	46% 81%	80% 77%	71% 66%	46% 81%					
		B	EK	Ek	AbDEjK	AbDEjK	adEK	EK	EK	EK	EK	EK	EK
Lack of awareness or understanding	52	45 7	15 37	4 14	17 2	4 4	3 4	8 4					
	11%	11% 15%	27% 9%	30% 21%	17% 3%	8% 4%	10% 12%	13% 13%					
		BFGHij	BFGHi	BFGH	BFH		fh	fh					
Lack of staff with the right skills	50	42 7	7 43	1 8	15 5	6 12	* 3	15 9%					
	11%	10% 16%	13% 11%	11% 11%	16% 8%	11% 10%	1% 9%	25% 25%					
		l	l	l	l	i	i	BdFgHIJ					
The fast changing pace of technology	19	16 3	1 19	1 1	9 2	3 * 2	4 2	4 7%					
	4%	4% 7%	1% 5%	6% 1%	10% 4%	3% 1%	5% 5%	7% 7%					
					bDgi		d						
Concern over online crime	15	12 2	- 15	- 2	3 2	4 2	1 1	2 2					
	3%	3% 5%	- 4%	- 3%	3% 3%	3% 2%	3% 6%	3% 3%					
Cost of setting up	14	13 1	- 14	- 1	5 -	4 2	1 1	2 2					
	3%	3% 2%	- 3%	- 1%	5% -	4% 8%	3% 3%	4% 4%					
						dF							

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Any social media

Base: All whose business does not currently have at least one form of company social media

	Business size			Industry										
	1-9	10+		Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, recreation and other services	Retail and wholesale
Total	a	b		a	b	c	d	e	f	g	h	i	j	k
	A	B		A	B	C	D	E	F	G	H	I	J	K
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	450	342	108	27	423	11	62	72	47	64	78	46	70	44
Weighted Total	459	413	46	55	404	12	68	99	55	52	110	28	36	59
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Poor broadband speed or connectivity	6	5	2	-	6	-	*	5	*	*	-	-	-	2
	1%	1%	4%	-	2%	-	*	5%	1%	1%	-	-	-	3%
			a					BdHJ						
None of these	61	54	6	7	53	2	9	20	4	4	11	6	5	10
	13%	13%	14%	13%	13%	14%	13%	21%	7%	8%	10%	22%	14%	17%
								bFGH				FGH		

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

3. Which of the following reasons, if any, explain why your business does not use each of the following online facilities? Please select up to three answers for each.

Any social media

Base: All whose business does not currently have at least one form of company social media

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	450	246	203	74	359	17	100	350	201	249	79	352	19
Weighted Total	459	250	209	58	387	13	85	374	202	257	77	362	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
It is not relevant to my business	310	173	136	37	265	7	51	258	135	175	42	252	16
	67%	69%	65%	64%	68%	53%	60%	69%	67%	68%	54%	70%	82%
											A	A	
Lack of awareness or understanding	52	26	26	4	47	1	13	39	16	36	8	44	1
	11%	10%	12%	7%	12%	5%	15%	10%	8%	14%	10%	12%	3%
										a			
Lack of staff with the right skills	50	26	23	9	37	4	16	34	23	27	13	32	5
	11%	11%	11%	15%	9%	31%	19%	9%	11%	11%	18%	9%	24%
						B	B				B		B
The fast changing pace of technology	19	12	8	7	11	1	9	10	8	11	3	14	2
	4%	5%	4%	12%	3%	9%	11%	3%	4%	4%	5%	4%	9%
				B			B						
Concern over online crime	15	4	11	2	13	1	3	12	6	9	5	8	1
	3%	2%	5%	3%	3%	5%	3%	3%	3%	4%	7%	2%	6%
			A								B		
Cost of setting up	14	3	11	1	13	1	3	11	2	11	7	7	1
	3%	1%	5%	1%	3%	4%	3%	3%	1%	4%	9%	2%	3%
			A							A	B		
Poor broadband speed or connectivity	6	4	3	2	3	1	2	4	4	2	2	4	-
	1%	1%	1%	3%	1%	11%	2%	1%	2%	1%	3%	1%	-
						B							
None of these	61	32	29	7	53	-	10	51	33	28	14	46	1
	13%	13%	14%	13%	14%	-	12%	14%	16%	11%	18%	13%	3%

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

4. What proportion of your business sales, if any, are made through an online payment system (including PayPal, WorldPay and online tools for credit / debit card payments, but excluding manually typed emails)?

Base: All who make sales online

	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	
	a	b		a	b	c	d	e	f	g	h	i	j	k	
	A	B		A	B	C	D	E	F	G	H	I	J	K	
Unweighted Total	147	100	47	9	138	5	14	36	15	13	21	19	24	29	
Weighted Total	138	121	18	19	120	7	17	41	18	9	24	10	12	32	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
None	16	16	-	4	12	-	5	2	4	1	2	1	2	-	
	12%	14%	-	22%	10%	-	28%	6%	24%	10%	7%	7%	14%	-	
		B		K	k		bEK		eK	k			K		
1 - 25%	66	56	10	11	55	4	9	17	9	5	10	6	6	11	
	47%	46%	55%	60%	46%	55%	53%	41%	49%	49%	43%	60%	50%	35%	
												k			
26 - 50%	12	8	4	2	10	2	2	2	-	1	3	2	1	1	
	9%	7%	21%	9%	9%	23%	11%	4%	-	9%	11%	24%	9%	4%	
			A			f						BEfK			
51 - 75%	16	14	2	-	16	-	1	7	2	-	6	*	-	7	
	11%	11%	11%	-	13%	-	4%	18%	10%	-	24%	3%	-	22%	
					j			J			giJ			giJ	
76 - 100%	25	23	2	2	24	2	1	13	3	3	2	1	2	12	
	18%	19%	12%	9%	20%	23%	4%	31%	17%	31%	7%	6%	18%	39%	
								DHI		dhi				BDHI	
Don't know	3	3	*	-	3	-	-	*	-	-	2	-	1	*	
	2%	2%	2%	-	3%	-	-	1%	-	-	7%	-	9%	1%	

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

4. What proportion of your business sales, if any, are made through an online payment system (including PayPal, WorldPay and online tools for credit / debit card payments, but excluding manually typed emails)?

Base: All who make sales online

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	147	84	63	38	103	6	45	102	66	81	32	107	8
Weighted Total	138	72	66	29	105	4	32	107	63	76	26	103	9
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None	16	15	2	2	14	-	2	14	12	5	*	15	1
	12%	20%	3%	8%	13%	-	7%	13%	19%	6%	1%	15%	7%
		B							B		A		
1 - 25%	66	31	34	17	46	2	16	50	31	34	13	51	2
	47%	43%	52%	58%	44%	57%	50%	47%	50%	45%	49%	49%	27%
26 - 50%	12	6	6	1	10	1	6	6	5	7	5	7	*
	9%	9%	9%	4%	10%	14%	19%	6%	9%	9%	19%	7%	3%
							B				B		
51 - 75%	16	6	9	4	11	-	5	11	8	8	1	11	4
	11%	9%	14%	15%	11%	-	15%	10%	12%	11%	4%	11%	41%
													AB
76 - 100%	25	13	13	4	20	1	2	23	5	20	5	18	2
	18%	18%	19%	14%	19%	28%	8%	21%	8%	27%	19%	18%	22%
							A		A				
Don't know	3	1	2	*	3	-	*	3	1	2	2	1	-
	2%	1%	3%	1%	3%	-	1%	3%	2%	2%	8%	1%	-
											B		

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

5. Has your business's use of sales through an online payment system (including PayPal, WorldPay and online tools for credit / debit card payments, but excluding manually typed emails) had a positive or negative impact on the number of sales your business makes offline?

Base: All who make sales through online payment system

	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
	a	b		a	b	c	d	e	f	g	h	i	j	k
	A	B		A	B	C	D	E	F	G	H	I	J	K
Unweighted Total	130	84	46	8	122	5	12	34	12	12	19	17	19	28
Weighted Total	119	101	18	14	105	7	12	38	14	8	20	9	9	31
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very positive impact	13	10	2	-	13	-	-	*	3	2	4	1	3	-
	11%	10%	14%	-	12%	-	-	1%	21%	18%	20%	12%	30%	-
					Ek				EK	EK	EK	ek	aBDEK	
Fairly positive impact	44	38	6	7	37	2	6	16	7	*	7	2	2	12
	37%	37%	34%	45%	35%	32%	49%	43%	54%	4%	35%	17%	27%	39%
				G	G		Gi	Gi	GI		g		G	
No real impact either way	53	44	8	8	45	5	5	18	4	6	6	5	3	16
	44%	44%	48%	55%	43%	68%	41%	48%	26%	78%	29%	58%	38%	50%
										BdeFHJ		h		
Fairly negative impact	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Very negative impact	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Not applicable - my business does not make sales offline	6	5	1	-	6	-	1	4	-	-	-	1	1	4
	5%	5%	4%	-	6%	-	5%	9%	-	-	-	13%	6%	11%
Don't know	4	4	-	-	4	-	1	-	-	-	3	-	-	-
	3%	4%	-	-	4%	-	5%	-	-	-	17%	-	-	-
											BEijk			

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

5. Has your business's use of sales through an online payment system (including PayPal, WorldPay and online tools for credit / debit card payments, but excluding manually typed emails) had a positive or negative impact on the number of sales your business makes offline?

Base: All who make sales through online payment system

	Business size		Industry											
	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale	
Total	a	b	a	b	c	d	e	f	g	h	i	j	k	
	A	B	A	B	C	D	E	F	G	H	I	J	K	
Unweighted Total	130	84	46	8	122	5	12	34	12	12	19	17	19	28
Weighted Total	119	101	18	14	105	7	12	38	14	8	20	9	9	31
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Nets														
Positive impact	56	48	8	7	50	2	6	17	10	2	11	3	5	12
	47%	47%	48%	45%	47%	32%	49%	43%	74%	22%	55%	30%	56%	39%
					g				beGIK		g		g	
Negative impact	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

5. Has your business's use of sales through an online payment system (including PayPal, WorldPay and online tools for credit / debit card payments, but excluding manually typed emails) had a positive or negative impact on the number of sales your business makes offline?

Base: All who make sales through online payment system

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	130	70	60	36	88	6	43	87	57	73	29	94	7
Weighted Total	119	57	62	27	88	4	29	90	49	69	24	87	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very positive impact	13	8	5	3	9	1	3	9	6	6	3	8	2
	11%	13%	8%	11%	10%	14%	12%	10%	12%	9%	14%	9%	20%
Fairly positive impact	44	20	23	12	30	1	15	29	23	21	6	35	3
	37%	36%	38%	46%	34%	28%	51%	32%	47%	30%	23%	40%	42%
							B		B				
No real impact either way	53	23	30	10	41	2	11	42	20	33	13	38	1
	44%	40%	49%	38%	47%	43%	36%	47%	40%	48%	56%	44%	18%
											c		
Fairly negative impact	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
Very negative impact	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
Not applicable - my business does not make sales offline	6	4	2	1	4	1	*	6	1	5	1	4	-
	5%	7%	3%	5%	4%	15%	1%	6%	1%	8%	6%	5%	-
										a			
Don't know	4	2	2	-	4	-	-	4	-	4	-	2	2
	3%	4%	3%	-	5%	-	-	5%	-	6%	-	3%	20%
										a			AB
Nets													
Positive impact	56	28	28	15	39	2	18	38	29	27	9	42	5
	47%	49%	45%	57%	44%	42%	63%	42%	59%	39%	37%	48%	62%
							B		B				
Negative impact	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

6. Which of the following, if any, do you think would be the greatest benefits for your business of having a greater online presence? Please select up to three.

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
	a	b		a	b	c	d	e	f	g	h	i	j	k
	A	B		A	B	C	D	E	F	G	H	I	J	K
Significance Level: 90%														
Significance Level: 95%														
Unweighted Total	510	378	132	33	477	16	64	81	59	71	88	52	79	51
Weighted Total	510	454	56	63	447	19	70	109	66	56	119	30	40	66
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased visibility of products or services	223 44%	200 44%	23 41%	34 53%	189 42%	14 73%	29 42%	53 48%	23 35%	24 43%	44 37%	20 68%	16 39%	33 50%
				f		BDeFGHJ						BDEFGHJ k		
Better engagement with customers and prospective customers	193 38%	170 37%	23 41%	23 36%	170 38%	6 31%	24 35%	48 44%	21 31%	17 29%	48 41%	13 45%	16 39%	32 48%
								g				g		fG
Expanded geographical reach	130 26%	116 26%	14 25%	12 19%	118 27%	3 18%	10 15%	45 41%	18 28%	8 15%	31 26%	5 17%	9 22%	30 45%
					DG			ABcDGHJ	dg		dg			ABcDfGHI J
Lower marketing costs	71 14%	59 13%	12 21%	6 9%	65 15%	- -	8 12%	17 16%	8 12%	6 11%	16 13%	7 23%	8 20%	8 12%
			A					c				aCg	c	
Being open for business 24 hours a day	64 13%	51 11%	13 23%	14 22%	51 11%	2 12%	15 21%	19 17%	8 12%	3 6%	10 9%	2 6%	5 12%	14 21%
			A	bGhI			BGHI	GhI						BGHI
Lower overhead costs	54 11%	46 10%	9 15%	1 1%	54 12%	1 4%	3 5%	20 18%	9 13%	3 6%	9 8%	5 16%	4 10%	16 25%
					ad			ADGH	ad			ADg	a	ABcDGHJ

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

6. Which of the following, if any, do you think would be the greatest benefits for your business of having a greater online presence? Please select up to three.

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
	a	b		a	b	c	d	e	f	g	h	i	j	k
	A	B		A	B	C	D	E	F	G	H	I	J	K
Unweighted Total	510	378	132	33	477	16	64	81	59	71	88	52	79	51
Weighted Total	510	454	56	63	447	19	70	109	66	56	119	30	40	66
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Greater business flexibility	52	45	7	4	48	-	6	19	4	7	11	1	3	13
	10%	10%	13%	7%	11%	-	9%	17%	7%	12%	9%	4%	9%	19%
								bcl						bcl
None of the above	29	27	2	-	29	-	4	6	8	2	5	1	2	*
	6%	6%	3%	-	6%	-	6%	6%	13%	4%	4%	2%	4%	1%
					k				Abghljk					
Not applicable - my business's online presence is as good as it can be at the moment	44	36	9	7	37	2	6	1	10	7	10	1	6	1
	9%	8%	16%	12%	8%	13%	8%	1%	15%	12%	9%	5%	15%	1%
			A	EK	Ek	EK	Ek		bEiK	EK	Ek		bEiK	
Not applicable - I do not think having a greater online presence would benefit my business	74	72	3	2	73	2	7	15	6	12	28	1	5	10
	15%	16%	5%	3%	16%	9%	9%	13%	9%	22%	23%	3%	12%	14%
		B			Al			ai		Adfl	ADeFlj		i	al

Columns Tested: A,B - A,B,C,D,E,F,G,H,I,J,K

QES Q2 2015

6. Which of the following, if any, do you think would be the greatest benefits for your business of having a greater online presence? Please select up to three.

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 90%		a	b	a	b	c	a	b	a	b	a	b	c
Significance Level: 95%		A	B	A	B	C	A	B	A	B	A	B	C
Unweighted Total	510	286	223	95	395	20	127	383	231	279	92	397	21
Weighted Total	510	282	227	75	420	15	101	409	226	284	90	400	20
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased visibility of products or services	223	117	106	42	172	9	55	168	84	139	36	181	6
	44%	41%	46%	57%	41%	58%	55%	41%	37%	49%	40%	45%	29%
				B			B		A				
Better engagement with customers and prospective customers	193	104	89	35	147	11	48	145	83	110	47	143	3
	38%	37%	39%	47%	35%	72%	48%	35%	37%	39%	52%	36%	15%
				B		AB	B				BC	c	
Expanded geographical reach	130	70	60	32	92	6	40	90	49	82	28	98	5
	26%	25%	26%	43%	22%	40%	40%	22%	22%	29%	31%	25%	23%
				B		b	B		a				
Lower marketing costs	71	41	29	18	50	3	16	55	24	46	13	56	2
	14%	14%	13%	24%	12%	19%	16%	13%	11%	16%	15%	14%	8%
				B					a				
Being open for business 24 hours a day	64	33	31	18	44	2	16	48	31	33	7	54	3
	13%	12%	14%	25%	11%	10%	16%	12%	14%	12%	8%	14%	14%
				B									
Lower overhead costs	54	29	25	16	37	1	21	34	27	27	17	35	3
	11%	10%	11%	22%	9%	10%	20%	8%	12%	10%	19%	9%	16%
				B			B				B		
Greater business flexibility	52	32	20	17	35	-	14	38	29	23	10	39	3
	10%	11%	9%	22%	8%	-	14%	9%	13%	8%	11%	10%	15%
				BC					b				
None of the above	29	15	13	1	27	1	1	28	17	12	4	22	3
	6%	5%	6%	1%	6%	6%	1%	7%	7%	4%	4%	6%	13%
					A	a		A					
Not applicable - my business's online presence is as good as it can be at the moment	44	29	15	4	40	1	6	38	23	21	7	35	2
	9%	10%	7%	5%	9%	8%	6%	9%	10%	7%	8%	9%	11%

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C

QES Q2 2015

6. Which of the following, if any, do you think would be the greatest benefits for your business of having a greater online presence? Please select up to three.

Base: All respondents

	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 try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
	a	b	a	b	c	a	b	a	b	a	b	c	
	A	B	A	B	C	A	B	A	B	A	B	C	
Unweighted Total	510	286	223	95	395	20	127	383	231	279	92	397	21
Weighted Total	510	282	227	75	420	15	101	409	226	284	90	400	20
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not applicable - I do not think having a greater online presence would benefit my business	74	39	36	1	73	1	6	69	36	38	7	64	4
	15%	14%	16%	1%	17%	6%	6%	17%	16%	13%	7%	16%	18%
					A			A				A	

Columns Tested: A,B - A,B,C - A,B - A,B - A,B,C