

# LCCI – QES Q2 2016

## METHODOLOGY NOTE

ComRes interviewed 508 London business decision makers online between 16<sup>th</sup> May and 6<sup>th</sup> June 2016. 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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## Topical Q2 2016

**Q10\_SUM.** From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?

### SUMMARY TABLE

Base: All respondents

|                                                                                                                  | Total       | Agree strongly | Tend to agree | Tend to disagree | Disagree strongly | Don't know | Net: Agree | Net: Disagree | Mean |
|------------------------------------------------------------------------------------------------------------------|-------------|----------------|---------------|------------------|-------------------|------------|------------|---------------|------|
| My business will be able to afford the charge                                                                    | 508<br>100% | 20<br>4%       | 84<br>16%     | 123<br>24%       | 95<br>19%         | 186<br>37% | 104<br>21% | 218<br>43%    | 2.1  |
| The charge will lead to skills gaps in my business                                                               | 508<br>100% | 27<br>5%       | 85<br>17%     | 146<br>29%       | 82<br>16%         | 168<br>33% | 112<br>22% | 228<br>45%    | 2.2  |
| In order to employ workers on Tier 2 visas, my business will need to cut costs elsewhere                         | 508<br>100% | 52<br>10%      | 115<br>23%    | 96<br>19%        | 54<br>11%         | 191<br>38% | 167<br>33% | 150<br>30%    | 2.5  |
| The charge will encourage my business to train or hire British/EEA employees instead of hiring non-EEA nationals | 508<br>100% | 49<br>10%      | 132<br>26%    | 92<br>18%        | 60<br>12%         | 175<br>34% | 181<br>36% | 152<br>30%    | 2.5  |

## Topical Q2 2016

**Q10\_1. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

### My business will be able to afford the charge

Base: All respondents

|                         | BUSINESS SIZE |                 |                | INDUSTRY                                     |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                | MANUFACTURING/SERVICES |  |
|-------------------------|---------------|-----------------|----------------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|----------------|------------------------|--|
|                         | Total         | 0-9             | 10+            | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing  | Services               |  |
|                         |               | a               | b              | *c                                           | d                       | e                                                                                       | f                           | g                                                         | h                                    | i                                                      | j                                                  | k              | l                      |  |
| Significance Level: 95% |               |                 |                |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                |                        |  |
| Unweighted Total        | 508           | 375             | 133            | 13                                           | 54                      | 90                                                                                      | 52                          | 78                                                        | 108                                  | 49                                                     | 64                                                 | 35             | 473                    |  |
| Weighted Total          | 508           | 455             | 53             | 18                                           | 71                      | 105                                                                                     | 68                          | 58                                                        | 120                                  | 30                                                     | 38                                                 | 44             | 464                    |  |
|                         | 100%          | 100%            | 100%           | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%           | 100%                   |  |
| Agree strongly (4)      | 20<br>4%      | 15<br>3%        | 6<br>11%<br>a  | 4<br>21%                                     | 1<br>1%                 | *<br>*                                                                                  | 1<br>2%                     | 3<br>5%                                                   | 8<br>7%                              | 2<br>5%                                                | 1<br>4%                                            | 5<br>11%<br>l  | 16<br>3%               |  |
| Tend to agree (3)       | 84<br>16%     | 64<br>14%       | 20<br>37%<br>a | 2<br>12%                                     | 18<br>25%               | 14<br>14%                                                                               | 9<br>13%                    | 10<br>17%                                                 | 22<br>18%                            | 4<br>14%                                               | 5<br>12%                                           | 7<br>15%       | 77<br>17%              |  |
| Tend to disagree (2)    | 123<br>24%    | 110<br>24%      | 13<br>24%      | 4<br>21%                                     | 14<br>20%               | 24<br>23%                                                                               | 16<br>23%                   | 16<br>28%                                                 | 32<br>27%                            | 9<br>29%                                               | 9<br>23%                                           | 6<br>14%       | 117<br>25%             |  |
| Disagree strongly (1)   | 95<br>19%     | 89<br>20%       | 6<br>11%<br>b  | 5<br>28%                                     | 18<br>26%               | 23<br>22%<br>f                                                                          | 2<br>3%                     | 10<br>17%<br>f                                            | 23<br>19%<br>f                       | 5<br>16%<br>f                                          | 9<br>25%<br>f                                      | 15<br>35%<br>l | 80<br>17%              |  |
| Don't know              | 186<br>37%    | 177<br>39%<br>b | 9<br>17%       | 3<br>18%                                     | 19<br>28%               | 43<br>41%                                                                               | 40<br>59%<br>deghij         | 20<br>34%                                                 | 36<br>30%                            | 11<br>36%                                              | 14<br>37%                                          | 11<br>25%      | 175<br>38%             |  |
| <b>NETS</b>             |               |                 |                |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                |                        |  |
| Net: Agree              | 104<br>21%    | 79<br>17%       | 25<br>48%<br>a | 6<br>33%                                     | 19<br>26%               | 15<br>14%                                                                               | 10<br>15%                   | 13<br>22%                                                 | 30<br>25%                            | 6<br>19%                                               | 6<br>16%                                           | 11<br>26%      | 93<br>20%              |  |
| Net: Disagree           | 218<br>43%    | 200<br>44%      | 18<br>35%      | 9<br>49%                                     | 32<br>46%<br>f          | 47<br>45%<br>f                                                                          | 18<br>26%                   | 26<br>44%<br>f                                            | 55<br>45%<br>f                       | 13<br>44%                                              | 18<br>47%<br>f                                     | 21<br>49%      | 197<br>42%             |  |
| Mean score              | 2.1           | 2.0             | 2.6<br>a       | 2.3                                          | 2.0                     | 1.9                                                                                     | 2.3                         | 2.1                                                       | 2.2<br>e                             | 2.1                                                    | 1.9                                                | 2.0            | 2.1                    |  |

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

## Topical Q2 2016

**Q10\_1. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

### My business will be able to afford the charge

Base: All respondents

|                         | BUSINESS SIZE |      |      | INDUSTRY                                     |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    | MANUFACTURING/SERVICES |          |
|-------------------------|---------------|------|------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|------------------------|----------|
|                         | Total         | 0-9  | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
|                         | a             | b    | c    | d                                            | e                       | f                                                                                       | g                           | h                                                         | i                                    | j                                                      | k                                                  | l                      |          |
| Significance Level: 95% |               |      |      |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                        |          |
| Unweighted Total        | 508           | 375  | 133  | 13                                           | 54                      | 90                                                                                      | 52                          | 78                                                        | 108                                  | 49                                                     | 64                                                 | 35                     | 473      |
| Weighted Total          | 508           | 455  | 53   | 18                                           | 71                      | 105                                                                                     | 68                          | 58                                                        | 120                                  | 30                                                     | 38                                                 | 44                     | 464      |
|                         | 100%          | 100% | 100% | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%                   | 100%     |
| Standard deviation      | .90           | .87  | .88  | 1.23                                         | .89                     | .79                                                                                     | .70                         | .89                                                       | .95                                  | .90                                                    | .91                                                | 1.14                   | .87      |
| Standard error          | .05           | .06  | .08  | .37                                          | .14                     | .11                                                                                     | .14                         | .12                                                       | .11                                  | .16                                                    | .14                                                | .22                    | .05      |

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

## Topical Q2 2016

**Q10\_1. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

### My business will be able to afford the charge

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      |
|                         |            | a            | b            | c                                  | d             | e         | f                | g                      | h             | i              | j               | k             | l         |
| Significance Level: 95% |            |              |              |                                    |               |           |                  |                        |               |                |                 |               |           |
| Unweighted Total        | 508        | 284          | 224          | 85                                 | 400           | 23        | 128              | 380                    | 200           | 308            | 106             | 381           | 21        |
| Weighted Total          | 508        | 268          | 240          | 67                                 | 419           | 22        | 87               | 421                    | 187           | 321            | 107             | 381           | 20        |
|                         | 100%       | 100%         | 100%         | 100%                               | 100%          | 100%      | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100%      |
| Agree strongly (4)      | 20<br>4%   | 16<br>6%     | 4<br>2%      | 7<br>11%                           | 12<br>3%      | 1<br>4%   | 7<br>8%          | 13<br>3%               | 9<br>5%       | 11<br>3%       | 5<br>5%         | 14<br>4%      | 1<br>5%   |
| Tend to agree (3)       | 84<br>16%  | 53<br>20%    | 31<br>13%    | 17<br>26%                          | 64<br>15%     | 2<br>11%  | 22<br>26%        | 62<br>15%              | 39<br>21%     | 44<br>14%      | 16<br>15%       | 67<br>18%     | 1<br>4%   |
| Tend to disagree (2)    | 123<br>24% | 64<br>24%    | 60<br>25%    | 18<br>26%                          | 100<br>24%    | 6<br>27%  | 23<br>26%        | 100<br>24%             | 41<br>22%     | 83<br>26%      | 22<br>21%       | 93<br>24%     | 8<br>40%  |
| Disagree strongly (1)   | 95<br>19%  | 49<br>18%    | 46<br>19%    | 11<br>17%                          | 75<br>18%     | 8<br>38%  | 21<br>24%        | 74<br>18%              | 34<br>18%     | 61<br>19%      | 26<br>24%       | 63<br>17%     | 6<br>31%  |
| Don't know              | 186<br>37% | 86<br>32%    | 100<br>41%   | 13<br>20%                          | 168<br>40%    | 4<br>20%  | 13<br>15%        | 172<br>41%             | 64<br>34%     | 122<br>38%     | 37<br>35%       | 144<br>38%    | 4<br>20%  |
| <b>NETS</b>             |            |              |              |                                    |               |           |                  |                        |               |                |                 |               |           |
| Net: Agree              | 104<br>21% | 69<br>26%    | 35<br>15%    | 25<br>37%                          | 76<br>18%     | 3<br>15%  | 29<br>34%        | 75<br>18%              | 49<br>26%     | 55<br>17%      | 21<br>20%       | 81<br>21%     | 2<br>9%   |
| Net: Disagree           | 218<br>43% | 113<br>42%   | 105<br>44%   | 29<br>43%                          | 175<br>42%    | 14<br>65% | 44<br>51%        | 174<br>41%             | 74<br>40%     | 144<br>45%     | 48<br>45%       | 155<br>41%    | 14<br>71% |
| Mean score              | 2.1        | 2.2          | 2.0          | 2.4                                | 2.1           | 1.8       | 2.2              | 2.1                    | 2.2           | 2.0            | 2.0             | 2.1           | 1.8       |
| Standard deviation      | .90        | .94          | .82          | .97                                | .87           | .90       | .98              | .87                    | .93           | .87            | .96             | .88           | .83       |
| Standard error          | .05        | .07          | .07          | .12                                | .05           | .21       | .09              | .06                    | .08           | .06            | .12             | .05           | .20       |

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

## Topical Q2 2016

**Q10\_2. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

### The charge will lead to skills gaps in my business

Base: All respondents

|                         | BUSINESS SIZE |                 |                | INDUSTRY                                     |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    | MANUFACTURING/SERVICES |            |
|-------------------------|---------------|-----------------|----------------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|------------------------|------------|
|                         | Total         | 0-9             | 10+            | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services   |
|                         |               | a               | b              | *c                                           | d                       | e                                                                                       | f                           | g                                                         | h                                    | i                                                      | j                                                  | k                      | l          |
| Significance Level: 95% |               |                 |                |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                        |            |
| Unweighted Total        | 508           | 375             | 133            | 13                                           | 54                      | 90                                                                                      | 52                          | 78                                                        | 108                                  | 49                                                     | 64                                                 | 35                     | 473        |
| Weighted Total          | 508           | 455             | 53             | 18                                           | 71                      | 105                                                                                     | 68                          | 58                                                        | 120                                  | 30                                                     | 38                                                 | 44                     | 464        |
|                         | 100%          | 100%            | 100%           | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%                   | 100%       |
| Agree strongly (4)      | 27<br>5%      | 20<br>4%        | 7<br>13%<br>a  | -                                            | 3<br>5%                 | 6<br>6%                                                                                 | 3<br>4%                     | 4<br>6%                                                   | 5<br>4%                              | 2<br>6%                                                | 4<br>11%                                           | 1<br>2%                | 26<br>6%   |
| Tend to agree (3)       | 85<br>17%     | 73<br>16%       | 13<br>24%<br>a | 5<br>28%                                     | 17<br>24%<br>g          | 18<br>18%                                                                               | 11<br>16%                   | 6<br>10%                                                  | 17<br>14%                            | 5<br>18%                                               | 5<br>14%                                           | 11<br>26%              | 74<br>16%  |
| Tend to disagree (2)    | 146<br>29%    | 129<br>28%      | 17<br>33%      | 8<br>42%                                     | 20<br>28%               | 29<br>28%                                                                               | 18<br>26%                   | 18<br>31%                                                 | 38<br>32%                            | 7<br>23%                                               | 8<br>22%                                           | 9<br>21%               | 137<br>29% |
| Disagree strongly (1)   | 82<br>16%     | 74<br>16%       | 8<br>14%       | 4<br>21%                                     | 12<br>16%               | 8<br>8%                                                                                 | 10<br>14%                   | 12<br>21%<br>e                                            | 23<br>19%<br>e                       | 5<br>16%                                               | 9<br>23%<br>e                                      | 12<br>27%              | 70<br>15%  |
| Don't know              | 168<br>33%    | 160<br>35%<br>b | 8<br>16%       | 2<br>9%                                      | 18<br>26%               | 43<br>41%                                                                               | 27<br>39%                   | 18<br>32%                                                 | 37<br>30%                            | 11<br>37%                                              | 12<br>31%                                          | 10<br>24%              | 158<br>34% |
| <b>NETS</b>             |               |                 |                |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                        |            |
| Net: Agree              | 112<br>22%    | 93<br>20%       | 19<br>37%<br>a | 5<br>28%                                     | 20<br>29%               | 25<br>23%                                                                               | 14<br>20%                   | 9<br>16%                                                  | 23<br>19%                            | 7<br>24%                                               | 9<br>25%                                           | 12<br>28%              | 100<br>22% |
| Net: Disagree           | 228<br>45%    | 203<br>45%      | 25<br>47%      | 12<br>63%                                    | 32<br>45%               | 37<br>35%                                                                               | 27<br>40%                   | 30<br>52%<br>e                                            | 61<br>51%<br>e                       | 12<br>39%                                              | 17<br>45%                                          | 21<br>48%              | 207<br>44% |
| Mean score              | 2.2           | 2.1             | 2.4<br>a       | 2.1                                          | 2.2                     | 2.4<br>gh                                                                               | 2.2                         | 2.0                                                       | 2.1                                  | 2.2                                                    | 2.2                                                | 2.0                    | 2.2        |

Columns Tested: a, b - c, d, e, f, g, h, i, j - k, l

## Topical Q2 2016

**Q10\_2. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

### The charge will lead to skills gaps in my business

Base: All respondents

|                         | BUSINESS SIZE |      | INDUSTRY |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    | MANUFACTURING/SERVICES |          |
|-------------------------|---------------|------|----------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|------------------------|----------|
|                         | Total         | 0-9  | 10+      | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
|                         | a             | b    | c        | d                                            | e                       | f                                                                                       | g                           | h                                                         | i                                    | j                                                      | k                                                  | l                      |          |
| Significance Level: 95% |               |      |          |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                        |          |
| Unweighted Total        | 508           | 375  | 133      | 13                                           | 54                      | 90                                                                                      | 52                          | 78                                                        | 108                                  | 49                                                     | 64                                                 | 35                     | 473      |
| Weighted Total          | 508           | 455  | 53       | 18                                           | 71                      | 105                                                                                     | 68                          | 58                                                        | 120                                  | 30                                                     | 38                                                 | 44                     | 464      |
|                         | 100%          | 100% | 100%     | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%                   | 100%     |
| Standard deviation      | .88           | .87  | .95      | .75                                          | .88                     | .84                                                                                     | .87                         | .91                                                       | .86                                  | .97                                                    | 1.07                                               | .91                    | .88      |
| Standard error          | .05           | .06  | .09      | .22                                          | .14                     | .11                                                                                     | .15                         | .12                                                       | .10                                  | .17                                                    | .16                                                | .17                    | .05      |

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

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**Q10\_2. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

### The charge will lead to skills gaps in my business

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      |
|                         |                | a              | b              | c                                  | d               | e        | f                | g                      | h             | i              | j               | k             | l         |
| Significance Level: 95% |                |                |                |                                    |                 |          |                  |                        |               |                |                 |               |           |
| Unweighted Total        | 508            | 284            | 224            | 85                                 | 400             | 23       | 128              | 380                    | 200           | 308            | 106             | 381           | 21        |
| Weighted Total          | 508            | 268            | 240            | 67                                 | 419             | 22       | 87               | 421                    | 187           | 321            | 107             | 381           | 20        |
|                         | 100%           | 100%           | 100%           | 100%                               | 100%            | 100%     | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100%      |
| Agree strongly          | (4) 27<br>5%   | 18<br>7%       | 9<br>4%        | 10<br>15%<br>d                     | 12<br>3%        | 5<br>24% | 12<br>14%        | 15<br>4%               | 13<br>7%      | 14<br>5%       | 8<br>8%         | 18<br>5%      | 1<br>7%   |
| Tend to agree           | (3) 85<br>17%  | 55<br>21%      | 30<br>12%      | 20<br>30%<br>d                     | 62<br>15%       | 3<br>12% | 30<br>35%        | 55<br>13%              | 37<br>20%     | 49<br>15%      | 23<br>22%       | 58<br>15%     | 4<br>19%  |
| Tend to disagree        | (2) 146<br>29% | 78<br>29%      | 68<br>28%      | 21<br>31%<br>d                     | 120<br>29%      | 5<br>23% | 19<br>22%        | 127<br>30%             | 55<br>29%     | 91<br>28%      | 28<br>26%       | 111<br>29%    | 7<br>36%  |
| Disagree strongly       | (1) 82<br>16%  | 45<br>17%      | 37<br>15%      | 6<br>9%                            | 72<br>17%       | 4<br>16% | 12<br>14%        | 70<br>17%              | 27<br>15%     | 54<br>17%      | 17<br>16%       | 61<br>16%     | 3<br>15%  |
| Don't know              | 168<br>33%     | 72<br>27%      | 96<br>40%<br>a | 10<br>15%                          | 153<br>36%<br>c | 5<br>24% | 14<br>16%        | 154<br>37%<br>f        | 56<br>30%     | 112<br>35%     | 30<br>28%       | 133<br>35%    | 5<br>23%  |
| <b>NETS</b>             |                |                |                |                                    |                 |          |                  |                        |               |                |                 |               |           |
| Net: Agree              | 112<br>22%     | 73<br>27%<br>b | 39<br>16%      | 30<br>45%<br>d                     | 74<br>18%       | 8<br>37% | 42<br>48%<br>g   | 70<br>17%              | 49<br>26%     | 63<br>20%      | 32<br>29%<br>k  | 76<br>20%     | 5<br>26%  |
| Net: Disagree           | 228<br>45%     | 123<br>46%     | 104<br>44%     | 27<br>40%                          | 192<br>46%      | 9<br>40% | 31<br>35%        | 197<br>47%<br>f        | 82<br>44%     | 146<br>45%     | 45<br>42%       | 172<br>45%    | 10<br>51% |
| Mean score              | 2.2            | 2.2            | 2.1            | 2.6<br>d                           | 2.1             | 2.6      | 2.6<br>g         | 2.1                    | 2.3           | 2.1            | 2.3             | 2.1           | 2.2       |
| Standard deviation      | .88            | .91            | .85            | .90                                | .83             | 1.18     | .95              | .83                    | .90           | .87            | .94             | .87           | .89       |
| Standard error          | .05            | .06            | .07            | .11                                | .05             | .28      | .09              | .05                    | .07           | .06            | .11             | .05           | .22       |

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l



## Topical Q2 2016

**Q10\_3. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

**In order to employ workers on Tier 2 visas, my business will need to cut costs elsewhere**

Base: All respondents

|                         | BUSINESS SIZE |            |           | INDUSTRY                                     |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |               | MANUFACTURING/SERVICES |  |
|-------------------------|---------------|------------|-----------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|---------------|------------------------|--|
|                         | Total         | 0-9        | 10+       | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing | Services               |  |
|                         |               | a          | b         | *c                                           | d                       | e                                                                                       | f                           | g                                                         | h                                    | i                                                      | j                                                  | k             | l                      |  |
| Significance Level: 95% |               |            |           |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |               |                        |  |
| Unweighted Total        | 508           | 375        | 133       | 13                                           | 54                      | 90                                                                                      | 52                          | 78                                                        | 108                                  | 49                                                     | 64                                                 | 35            | 473                    |  |
| Weighted Total          | 508           | 455        | 53        | 18                                           | 71                      | 105                                                                                     | 68                          | 58                                                        | 120                                  | 30                                                     | 38                                                 | 44            | 464                    |  |
|                         | 100%          | 100%       | 100%      | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%          | 100%                   |  |
| Agree strongly (4)      | 52<br>10%     | 46<br>10%  | 7<br>13%  | 2<br>9%                                      | 8<br>11%                | 16<br>15%                                                                               | 5<br>7%                     | 5<br>9%                                                   | 10<br>8%                             | 4<br>12%                                               | 4<br>11%                                           | 5<br>10%      | 48<br>10%              |  |
| Tend to agree (3)       | 115<br>23%    | 101<br>22% | 13<br>25% | 5<br>28%                                     | 22<br>31%               | 23<br>22%                                                                               | 10<br>14%                   | 11<br>20%                                                 | 28<br>23%                            | 8<br>28%                                               | 7<br>19%                                           | 11<br>25%     | 104<br>22%             |  |
| Tend to disagree (2)    | 96<br>19%     | 77<br>17%  | 19<br>36% | 4<br>21%                                     | 13<br>18%               | 20<br>19%                                                                               | 12<br>18%                   | 12<br>21%                                                 | 24<br>20%                            | 2<br>8%                                                | 9<br>23%                                           | 7<br>16%      | 89<br>19%              |  |
| Disagree strongly (1)   | 54<br>11%     | 49<br>11%  | 5<br>9%   | 4<br>21%                                     | 3<br>5%                 | 3<br>3%                                                                                 | 7<br>10%                    | 9<br>16%                                                  | 18<br>15%                            | 3<br>10%                                               | 7<br>19%                                           | 6<br>13%      | 48<br>10%              |  |
| Don't know              | 191<br>38%    | 182<br>40% | 9<br>16%  | 4<br>21%                                     | 25<br>35%               | 43<br>41%                                                                               | 34<br>51%                   | 20<br>34%                                                 | 41<br>34%                            | 13<br>42%                                              | 11<br>29%                                          | 16<br>36%     | 175<br>38%             |  |
| <b>NETS</b>             |               |            |           |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |               |                        |  |
| Net: Agree              | 167<br>33%    | 147<br>32% | 20<br>38% | 7<br>37%                                     | 30<br>42%               | 39<br>37%                                                                               | 14<br>21%                   | 17<br>29%                                                 | 38<br>31%                            | 12<br>40%                                              | 11<br>30%                                          | 15<br>35%     | 152<br>33%             |  |
| Net: Disagree           | 150<br>30%    | 126<br>28% | 24<br>45% | 8<br>42%                                     | 16<br>22%               | 23<br>22%                                                                               | 19<br>28%                   | 21<br>37%                                                 | 42<br>35%                            | 5<br>18%                                               | 16<br>41%                                          | 12<br>28%     | 138<br>30%             |  |
| Mean score              | 2.5           | 2.5        | 2.5       | 2.3                                          | 2.8<br>ghj              | 2.8<br>ghj                                                                              | 2.4                         | 2.3                                                       | 2.4                                  | 2.7                                                    | 2.3                                                | 2.5           | 2.5                    |  |

Columns Tested: a, b - c, d, e, f, g, h, i, j - k, l

## Topical Q2 2016

**Q10\_3. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

**In order to employ workers on Tier 2 visas, my business will need to cut costs elsewhere**

Base: All respondents

|                         | BUSINESS SIZE |      | INDUSTRY                                     |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |               | MANUFACTURING/SERVICES |      |
|-------------------------|---------------|------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|---------------|------------------------|------|
|                         | 0-9           | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing | Services               |      |
| Significance Level: 95% | a             | b    | c                                            | d                       | e                                                                                       | f                           | g                                                         | h                                    | i                                                      | j                                                  | k             | l                      |      |
| Unweighted Total        | 508           | 375  | 133                                          | 13                      | 54                                                                                      | 90                          | 52                                                        | 78                                   | 108                                                    | 49                                                 | 64            | 35                     | 473  |
| Weighted Total          | 508           | 455  | 53                                           | 18                      | 71                                                                                      | 105                         | 68                                                        | 58                                   | 120                                                    | 30                                                 | 38            | 44                     | 464  |
| Standard deviation      | 100%          | 100% | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%          | 100%                   | 100% |
| Standard error          | .96           | .97  | .89                                          | 1.03                    | .83                                                                                     | .88                         | .98                                                       | 1.00                                 | .97                                                    | 1.01                                               | 1.03          | 1.00                   | .96  |
|                         | .05           | .06  | .08                                          | .33                     | .13                                                                                     | .12                         | .18                                                       | .14                                  | .11                                                    | .19                                                | .15           | .20                    | .05  |

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

## Topical Q2 2016

**Q10\_3. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

**In order to employ workers on Tier 2 visas, my business will need to cut costs elsewhere**

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: 95% |       | a            | b            | c                                  | d             | *e   | f                | g                      | h             | i              | j               | k             | *l   |
| Unweighted Total        | 508   | 284          | 224          | 85                                 | 400           | 23   | 128              | 380                    | 200           | 308            | 106             | 381           | 21   |
| Weighted Total          | 508   | 268          | 240          | 67                                 | 419           | 22   | 87               | 421                    | 187           | 321            | 107             | 381           | 20   |
|                         | 100%  | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% |
| Agree strongly (4)      | 52    | 27           | 25           | 8                                  | 37            | 7    | 19               | 33                     | 15            | 37             | 18              | 30            | 4    |
|                         | 10%   | 10%          | 11%          | 12%                                | 9%            | 30%  | 22%              | 8%                     | 8%            | 12%            | 17%             | 8%            | 20%  |
|                         |       |              |              |                                    |               |      | g                |                        |               |                | k               |               |      |
| Tend to agree (3)       | 115   | 60           | 55           | 23                                 | 85            | 7    | 24               | 90                     | 46            | 69             | 25              | 84            | 6    |
|                         | 23%   | 22%          | 23%          | 34%                                | 20%           | 30%  | 28%              | 21%                    | 24%           | 22%            | 23%             | 22%           | 30%  |
|                         |       |              |              | d                                  |               |      |                  |                        |               |                |                 |               |      |
| Tend to disagree (2)    | 96    | 64           | 32           | 18                                 | 73            | 4    | 22               | 74                     | 40            | 56             | 19              | 73            | 4    |
|                         | 19%   | 24%          | 13%          | 27%                                | 18%           | 20%  | 25%              | 18%                    | 22%           | 17%            | 18%             | 19%           | 19%  |
|                         |       | b            |              | d                                  |               |      |                  |                        |               |                |                 |               |      |
| Disagree strongly (1)   | 54    | 28           | 26           | 6                                  | 48            | -    | 5                | 49                     | 17            | 37             | 8               | 43            | 3    |
|                         | 11%   | 10%          | 11%          | 8%                                 | 12%           | -    | 6%               | 12%                    | 9%            | 11%            | 7%              | 11%           | 13%  |
| Don't know              | 191   | 89           | 102          | 12                                 | 175           | 4    | 17               | 174                    | 69            | 122            | 37              | 150           | 4    |
|                         | 38%   | 33%          | 42%          | 18%                                | 42%           | 19%  | 19%              | 41%                    | 37%           | 38%            | 34%             | 39%           | 18%  |
|                         |       | a            |              |                                    | c             |      |                  | f                      |               |                |                 |               |      |
| <b>NETS</b>             |       |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |
| Net: Agree              | 167   | 87           | 80           | 31                                 | 123           | 13   | 43               | 124                    | 60            | 107            | 43              | 114           | 10   |
|                         | 33%   | 32%          | 33%          | 47%                                | 29%           | 61%  | 50%              | 29%                    | 32%           | 33%            | 41%             | 30%           | 50%  |
|                         |       |              |              | d                                  |               |      | g                |                        |               |                | k               |               |      |
| Net: Disagree           | 150   | 92           | 58           | 24                                 | 122           | 4    | 27               | 123                    | 58            | 92             | 27              | 117           | 6    |
|                         | 30%   | 34%          | 24%          | 36%                                | 29%           | 20%  | 31%              | 29%                    | 31%           | 29%            | 25%             | 31%           | 32%  |
|                         |       | b            |              |                                    |               |      |                  |                        |               |                |                 |               |      |
| Mean score              | 2.5   | 2.5          | 2.6          | 2.6                                | 2.5           | 3.1  | 2.8              | 2.4                    | 2.5           | 2.5            | 2.8             | 2.4           | 2.7  |
|                         |       |              |              |                                    |               |      | g                |                        |               |                | k               |               |      |
| Standard deviation      | .96   | .93          | 1.00         | .87                                | .98           | .80  | .92              | .96                    | .90           | 1.00           | .97             | .94           | 1.05 |
| Standard error          | .05   | .07          | .08          | .10                                | .06           | .19  | .09              | .06                    | .08           | .07            | .11             | .06           | .25  |

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

## Topical Q2 2016

**Q10\_4. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

**The charge will encourage my business to train or hire British/EEA employees instead of hiring non-EEA nationals**

Base: All respondents

|                         | BUSINESS SIZE |                 |                | INDUSTRY                                     |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    | MANUFACTURING/SERVICES |                |
|-------------------------|---------------|-----------------|----------------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|------------------------|----------------|
|                         | Total         | 0-9             | 10+            | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services       |
|                         |               | a               | b              | *c                                           | d                       | e                                                                                       | f                           | g                                                         | h                                    | i                                                      | j                                                  | k                      | l              |
| Significance Level: 95% |               |                 |                |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                        |                |
| Unweighted Total        | 508           | 375             | 133            | 13                                           | 54                      | 90                                                                                      | 52                          | 78                                                        | 108                                  | 49                                                     | 64                                                 | 35                     | 473            |
| Weighted Total          | 508           | 455             | 53             | 18                                           | 71                      | 105                                                                                     | 68                          | 58                                                        | 120                                  | 30                                                     | 38                                                 | 44                     | 464            |
|                         | 100%          | 100%            | 100%           | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%                   | 100%           |
| Agree strongly (4)      | 49<br>10%     | 41<br>9%        | 8<br>16%<br>a  | 2<br>9%                                      | 12<br>17%<br>gh         | 16<br>15%<br>gh                                                                         | 4<br>6%                     | 3<br>5%                                                   | 7<br>6%                              | 2<br>8%                                                | 3<br>9%                                            | 7<br>16%               | 42<br>9%       |
| Tend to agree (3)       | 132<br>26%    | 114<br>25%      | 18<br>33%<br>a | 9<br>49%                                     | 21<br>30%<br>gh         | 24<br>23%<br>gh                                                                         | 13<br>20%                   | 17<br>30%                                                 | 35<br>29%                            | 5<br>16%                                               | 7<br>17%                                           | 13<br>31%              | 119<br>26%     |
| Tend to disagree (2)    | 92<br>18%     | 82<br>18%       | 10<br>19%      | *<br>2%                                      | 11<br>15%               | 22<br>21%                                                                               | 11<br>16%                   | 10<br>18%                                                 | 21<br>18%                            | 7<br>25%                                               | 9<br>24%                                           | 2<br>6%                | 89<br>19%<br>k |
| Disagree strongly (1)   | 60<br>12%     | 54<br>12%       | 6<br>11%       | 3<br>18%                                     | 5<br>7%                 | 3<br>3%                                                                                 | 8<br>11%<br>e               | 10<br>18%<br>e                                            | 20<br>17%<br>e                       | 3<br>12%<br>e                                          | 7<br>19%<br>e                                      | 7<br>15%               | 54<br>12%      |
| Don't know              | 175<br>34%    | 164<br>36%<br>b | 11<br>21%      | 4<br>21%                                     | 22<br>32%               | 40<br>38%                                                                               | 32<br>47%<br>gh             | 17<br>30%                                                 | 36<br>30%                            | 12<br>40%                                              | 12<br>31%                                          | 14<br>33%              | 161<br>35%     |
| <b>NETS</b>             |               |                 |                |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                        |                |
| Net: Agree              | 181<br>36%    | 155<br>34%      | 26<br>49%<br>a | 11<br>58%                                    | 33<br>46%<br>fj         | 40<br>38%                                                                               | 18<br>26%                   | 20<br>35%                                                 | 42<br>35%                            | 7<br>24%                                               | 10<br>26%                                          | 20<br>47%              | 160<br>35%     |
| Net: Disagree           | 152<br>30%    | 136<br>30%      | 16<br>30%      | 4<br>21%                                     | 16<br>22%               | 25<br>24%                                                                               | 18<br>27%                   | 20<br>35%                                                 | 42<br>35%                            | 11<br>37%                                              | 16<br>42%<br>de                                    | 9<br>21%               | 143<br>31%     |
| Mean score              | 2.5           | 2.5             | 2.7            | 2.6                                          | 2.8<br>ghij             | 2.8<br>fghij                                                                            | 2.4                         | 2.3                                                       | 2.3                                  | 2.3                                                    | 2.2                                                | 2.7                    | 2.5            |

Columns Tested: a, b - c, d, e, f, g, h, i, j - k, l

## Topical Q2 2016

**Q10\_4. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

**The charge will encourage my business to train or hire British/EEA employees instead of hiring non-EEA nationals**

Base: All respondents

|                         | BUSINESS SIZE |      |      | INDUSTRY                                     |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    | MANUFACTURING/SERVICES |          |
|-------------------------|---------------|------|------|----------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------|--------------------------------------|--------------------------------------------------------|----------------------------------------------------|------------------------|----------|
|                         | Total         | 0-9  | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
|                         | a             | b    | c    | d                                            | e                       | f                                                                                       | g                           | h                                                         | i                                    | j                                                      | k                                                  | l                      |          |
| Significance Level: 95% |               |      |      |                                              |                         |                                                                                         |                             |                                                           |                                      |                                                        |                                                    |                        |          |
| Unweighted Total        | 508           | 375  | 133  | 13                                           | 54                      | 90                                                                                      | 52                          | 78                                                        | 108                                  | 49                                                     | 64                                                 | 35                     | 473      |
| Weighted Total          | 508           | 455  | 53   | 18                                           | 71                      | 105                                                                                     | 68                          | 58                                                        | 120                                  | 30                                                     | 38                                                 | 44                     | 464      |
|                         | 100%          | 100% | 100% | 100%                                         | 100%                    | 100%                                                                                    | 100%                        | 100%                                                      | 100%                                 | 100%                                                   | 100%                                               | 100%                   | 100%     |
| Standard deviation      | .95           | .95  | .96  | 1.00                                         | .92                     | .86                                                                                     | .96                         | .94                                                       | .94                                  | .96                                                    | 1.01                                               | 1.08                   | .94      |
| Standard error          | .05           | .06  | .09  | .32                                          | .15                     | .11                                                                                     | .18                         | .12                                                       | .11                                  | .17                                                    | .15                                                | .22                    | .05      |

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

## Topical Q2 2016

**Q10\_4. From April 2017, businesses will have to pay a charge of £1,000 per year (£364 for small businesses and charities) for each worker they employ on a Tier 2 (general) visa. Thinking about the possible impact of this charge on your business, to what extent, if at all, do you agree with each of the following statements?**

**The charge will encourage my business to train or hire British/EEA employees instead of hiring non-EEA nationals**

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 |
|                         |         | a            | b            | c                                  | d             | e    | f                | g                      | h             | i              | j               | k             | l    |
| Significance Level: 95% |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |
| Unweighted Total        | 508     | 284          | 224          | 85                                 | 400           | 23   | 128              | 380                    | 200           | 308            | 106             | 381           | 21   |
| Weighted Total          | 508     | 268          | 240          | 67                                 | 419           | 22   | 87               | 421                    | 187           | 321            | 107             | 381           | 20   |
|                         | 100%    | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% |
| Agree strongly          | (4) 49  | 22           | 27           | 8                                  | 37            | 4    | 16               | 33                     | 17            | 31             | 23              | 23            | 3    |
|                         | 10%     | 8%           | 11%          | 12%                                | 9%            | 17%  | 18%              | 8%                     | 9%            | 10%            | 21%             | 6%            | 15%  |
|                         |         |              |              |                                    |               |      | g                |                        |               |                | k               |               |      |
| Tend to agree           | (3) 132 | 70           | 62           | 24                                 | 105           | 4    | 22               | 109                    | 50            | 82             | 25              | 100           | 7    |
|                         | 26%     | 26%          | 26%          | 35%                                | 25%           | 16%  | 26%              | 26%                    | 27%           | 26%            | 23%             | 26%           | 35%  |
|                         |         |              |              | d                                  |               |      |                  |                        |               |                |                 |               |      |
| Tend to disagree        | (2) 92  | 55           | 37           | 9                                  | 79            | 4    | 19               | 73                     | 37            | 55             | 18              | 70            | 4    |
|                         | 18%     | 21%          | 15%          | 13%                                | 19%           | 20%  | 22%              | 17%                    | 20%           | 17%            | 16%             | 18%           | 21%  |
| Disagree strongly       | (1) 60  | 34           | 26           | 8                                  | 47            | 5    | 10               | 50                     | 19            | 41             | 12              | 47            | 1    |
|                         | 12%     | 13%          | 11%          | 12%                                | 11%           | 23%  | 12%              | 12%                    | 10%           | 13%            | 11%             | 12%           | 7%   |
| Don't know              | 175     | 87           | 88           | 18                                 | 152           | 5    | 19               | 156                    | 63            | 112            | 30              | 140           | 5    |
|                         | 34%     | 33%          | 37%          | 27%                                | 36%           | 24%  | 22%              | 37%                    | 34%           | 35%            | 28%             | 37%           | 23%  |
|                         |         |              |              |                                    |               |      |                  | f                      |               |                |                 |               |      |
| <b>NETS</b>             |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |
| Net: Agree              | 181     | 92           | 89           | 31                                 | 142           | 7    | 38               | 142                    | 67            | 113            | 47              | 123           | 10   |
|                         | 36%     | 34%          | 37%          | 47%                                | 34%           | 33%  | 44%              | 34%                    | 36%           | 35%            | 44%             | 32%           | 50%  |
|                         |         |              |              | d                                  |               |      | g                |                        |               |                | k               |               |      |
| Net: Disagree           | 152     | 89           | 63           | 17                                 | 125           | 9    | 29               | 123                    | 57            | 96             | 29              | 117           | 6    |
|                         | 30%     | 33%          | 26%          | 26%                                | 30%           | 43%  | 33%              | 29%                    | 30%           | 30%            | 27%             | 31%           | 27%  |
| Mean score              | 2.5     | 2.4          | 2.6          | 2.6                                | 2.5           | 2.4  | 2.7              | 2.5                    | 2.5           | 2.5            | 2.8             | 2.4           | 2.8  |
|                         |         |              |              |                                    |               |      |                  |                        |               |                | k               |               |      |
| Standard deviation      | .95     | .93          | .98          | .96                                | .94           | 1.17 | 1.01             | .94                    | .92           | .97            | 1.04            | .91           | .89  |
| Standard error          | .05     | .07          | .08          | .12                                | .06           | .27  | .10              | .06                    | .08           | .07            | .12             | .06           | .22  |

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l