

## LCCI, Quarterly Economic Survey – Q4 2019

*Methodology: Savanta ComRes interviewed 508 London business leaders online between 30<sup>th</sup> October and 26<sup>th</sup> November 2019. Data were weighted to be representative of all London business leaders by size and broad industry sector. Savanta ComRes is a member of the British Polling Council and abides by its rules. Full tables at [www.comresglobal.com](http://www.comresglobal.com)*

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## QES Q4 2019

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Base: All respondents	

# **QES Q4 2019**

## **Total employed.**

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1-9	240	240	-	9	49	50	33	30	49	6	15	34	207
	47%	52%	-	50%	64%	51%	48%	46%	41%	21%	42%	55%	46%
		b			ghij	i	i	i	i		i		
10-19	25	-	25	2	3	7	3	3	4	1	1	5	21
	5%	-	53%	14%	4%	7%	5%	5%	3%	5%	4%	8%	5%
			a										
20-49	13	-	13	2	2	3	-	1	3	2	*	3	9
	3%	-	27%	11%	3%	3%	-	2%	3%	6%	1%	6%	2%
			a										
50-99	5	-	5	1	*	2	1	*	1	*	-	1	4
	1%	-	10%	3%	1%	2%	1%	*	1%	1%	-	2%	1%
			a										
100-199	2	-	2	*	*	*	*	*	*	*	*	1	1
	*	-	3%	3%	*	*	*	*	*	*	*	1%	*
			a										
200-249	1	-	1	-	*	*	*	-	*	*	-	*	1
	*	-	3%	-	*	*	*	-	*	*	-	1%	*
			a										
250-499	1	-	1	-	*	*	*	*	*	*	-	*	1
	*	-	1%	-	*	*	*	*	*	1%	-	*	*
			a										
500+	1	-	1	*	*	*	*	-	*	*	-	*	1
	*	-	3%	*	*	*	1%	-	*	1%	-	*	*
			a										
Sole trader	220	220	-	3	21	35	31	31	62	19	18	17	203
	43%	48%	-	18%	28%	36%	45%	46%	52%	65%	53%	28%	45%
		b						d	de	deg	de		k
Total number of employees	12623	1397	11227	270	812	5133	1710	355	3753	474	117	812	11812
Mean score	24.8	3.0	236.1	15.9	10.7	52.9	24.7	5.4	31.4	16.6	3.4	13.4	26.4
Standard deviation	863.62	2.20	2841.1	42.68	85.29	1762.44	403.91	15.24	757.17	94.87	8.54	90.77	919.95

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

**QES Q4 2019****Total employed.**

Base: All respondents

Significance Level: 95%

Unweighted Total

Weighted Total

Standard error

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

	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
			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
Total	0-9	10+										
	a	b	*c	d	e	f	g	h	i	j	k	l
508	326	182	13	65	130	40	65	90	57	48	55	453
508	460	48	17	76	97	69	66	119	29	35	61	447
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
38.32	.12	210.60	11.84	10.58	154.58	63.86	1.89	79.81	12.57	1.23	12.24	43.22

## QES Q4 2019

### Total employed.

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: 95%		a	b	c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1-9	240	124	116	36	183	21	52	189	101	140	67	164	9
	47%	46%	49%	53%	45%	64% d	54%	46%	47%	48%	49%	47%	39%
10-19	25	15	10	9	14	2	15	11	17	8	7	17	1
	5%	6%	4%	13% d	4%	6%	15% g	3%	8% i	3%	5%	5%	3%
20-49	13	9	4	5	7	1	10	3	10	3	5	7	*
	3%	3%	2%	8% d	2%	2%	10% g	1%	5% i	1%	4%	2%	1%
50-99	5	3	2	3	2	*	3	1	3	1	2	3	-
	1%	1%	1%	4% d	*	1%	3% g	*	2%	*	1%	1%	-
100-199	2	1	1	*	1	*	1	*	1	*	*	1	*
	*	*	*	*	*	1%	1%	*	1%	*	*	*	1%
200-249	1	*	1	*	1	*	1	*	1	*	*	1	-
	*	*	*	1%	*	*	1%	*	*	*	*	*	-
250-499	1	*	*	*	*	*	1	*	*	*	*	*	*
	*	*	*	*	*	*	1%	*	*	*	*	*	*
500+	1	1	*	1	1	*	1	*	1	1	1	1	*
	*	*	*	1%	*	*	1%	*	*	*	1%	*	*
Sole trader	220	115	105	14	198	8	13	207	81	139	53	154	13
	43%	43%	44%	21%	49% ce	25%	14%	50% f	38%	47% h	39%	44%	55%
Total number of employees	12623	8843	3781	7602	3242	1779	10811	1812	9630	2993	4331	7591	702
Mean score	24.8	32.8	15.8	111.6	8.0	53.5	112.2	4.4	44.7	10.2	31.8	21.8	29.6
Standard deviation	863.62	1112.37	440.87	2264.40	160.04	844.78	1988.45	21.67	1300.26	229.55	685.31	943.95	486.23
Standard error	38.32	69.80	27.66	219.94	8.41	133.57	149.46	1.19	82.57	14.24	55.22	51.81	103.67

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

## QES Q4 2019

### S1. Which of the following responsibilities do you hold in your organisation?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Control of or having a say in budgeting or financial decisions	406	374	32	13	59	72	59	52	100	23	28	47	359
	80%	81%	67%	74%	78%	74%	86%	79%	84%	80%	80%	78%	80%
		b											
Control of or having a say in operational decisions	435	398	37	9	67	74	66	61	103	23	32	47	388
	86%	86%	78%	51%	89%	76%	96%	92%	86%	80%	92%	77%	87%
		b			e		ei	e			e		
Recruitment (hiring new staff on a permanent or temporary basis)	226	202	24	5	46	33	33	32	52	10	15	36	191
	45%	44%	50%	29%	61%	34%	47%	48%	44%	34%	43%	59%	43%
					ehi							l	
Directly managing one or more employees	216	188	29	4	47	34	35	34	43	6	12	33	183
	43%	41%	60%	24%	62%	35%	51%	52%	36%	22%	34%	55%	41%
		a			ehij		i	ei				l	
IT systems	265	246	19	4	41	35	48	38	72	11	16	29	236
	52%	53%	40%	21%	54%	36%	70%	58%	60%	40%	45%	47%	53%
		b			e		ej	e	ei				
Procurement / supply chain management	230	214	17	*	43	40	37	26	56	12	16	28	202
	45%	46%	35%	3%	57%	41%	53%	39%	47%	40%	47%	46%	45%
		b			eg								
None of the above	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

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

## QES Q4 2019

### S1. Which of the following responsibilities do you hold in your organisation?

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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Control of or having a say in budgeting or financial decisions	406	217	189	52	328	26	71	335	164	242	111	276	20
	80%	80%	79%	77%	81%	78%	73%	81% f	76%	83%	81%	79%	82%
Control of or having a say in operational decisions	435	232	203	49	358	29	73	363	177	258	111	304	20
	86%	86%	85%	72%	88% c	86%	75%	88% f	82%	88% h	81%	87%	84%
Recruitment (hiring new staff on a permanent or temporary basis)	226	116	111	35	173	18	53	173	93	133	59	158	9
	45%	43%	46%	51%	43%	54%	55% g	42%	43%	46%	43%	45%	38%
Directly managing one or more employees	216	111	105	35	163	19	58	158	89	127	58	151	7
	43%	41%	44%	51% d	40% d	57% d	60% g	39%	41%	43%	43%	43%	31%
IT systems	265	142	123	27	218	20	38	227	102	163	66	189	11
	52%	53%	52%	39%	54% c	60% c	39%	55% f	47%	56%	48%	54%	44%
Procurement / supply chain management	230	122	108	25	189	16	41	189	92	139	67	157	7
	45%	45%	45%	37%	47%	47%	42%	46%	43%	47%	49%	45%	30%
None of the above	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

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



## QES Q4 2019

### S2.Please choose the region you currently work in.

Base: All respondents

Significance Level: 95%

Unweighted Total

Weighted Total

London

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

	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
			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
Total	0-9	10+	*c	d	e	f	g	h	i	j	k	l
508	326	182	13	65	130	40	65	90	57	48	55	453
508	460	48	17	76	97	69	66	119	29	35	61	447
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
508	460	48	17	76	97	69	66	119	29	35	61	447
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

## QES Q4 2019

### S2. Please choose the region you currently work in.

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

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

## QES Q4 2019

### D1. How many people does your company employ?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0 sole trader	220	220	-	3	21	35	31	31	62	19	18	17	203
	43%	48%	-	18%	28%	36%	45%	46%	52%	65%	53%	28%	45%
		b				d		de		deg	de		k
1-9	240	240	-	9	49	50	33	30	49	6	15	34	207
	47%	52%	-	50%	64%	51%	48%	46%	41%	21%	42%	55%	46%
		b			ghij	i	i	i	i		i		
10-19	25	-	25	2	3	7	3	3	4	1	1	5	21
	5%	-	53%	14%	4%	7%	5%	5%	3%	5%	4%	8%	5%
			a										
20-49	13	-	13	2	2	3	-	1	3	2	*	3	9
	3%	-	27%	11%	3%	3%	-	2%	3%	6%	1%	6%	2%
			a										
50-99	5	-	5	1	*	2	1	*	1	*	-	1	4
	1%	-	10%	3%	1%	2%	1%	*	1%	1%	-	2%	1%
			a										
100-199	2	-	2	*	*	*	*	*	*	*	*	1	1
	*	-	3%	3%	*	*	*	*	*	*	*	1%	*
			a										
200-249	1	-	1	-	*	*	*	-	*	*	-	*	1
	*	-	3%	-	*	*	*	-	*	*	-	1%	*
			a										
250-499	1	-	1	-	*	*	*	*	*	*	-	*	1
	*	-	1%	-	*	*	*	*	*	1%	-	*	*
			a										
500+	1	-	1	*	*	*	*	-	*	*	-	*	1
	*	-	3%	*	*	*	1%	-	*	1%	-	*	*
			a										

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

## QES Q4 2019

### D1. How many people does your company employ?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: More than 9	48	-	48	5	6	12	5	5	9	4	2	10	37
	9%	-	100%	32%	8%	13%	7%	7%	7%	13%	5%	17%	8%
			a									l	
<b>BCC NETS</b>													
Net: 0-19	486	460	25	14	73	92	68	64	115	26	35	55	430
	96%	100%	53%	83%	96%	94%	98%	97%	96%	91%	99%	91%	96%
			b										
Net: 20-199	19	-	19	3	2	5	1	2	4	2	*	5	14
	4%	-	40%	17%	3%	5%	1%	3%	4%	7%	1%	8%	3%
			a										
Net: 200-499	2	-	2	-	*	1	*	*	*	*	-	*	2
	*	-	4%	-	*	1%	1%	*	*	1%	-	1%	*
			a										
Net: 500+	1	-	1	*	*	*	*	-	*	*	-	*	1
	*	-	3%	*	*	*	1%	-	*	1%	-	*	*
			a										
<b>ONS NETS</b>													
Net: 0-9	460	460	-	12	70	85	64	61	111	25	33	51	410
	91%	100%	-	68%	92%	87%	93%	93%	93%	87%	95%	83%	92%
			b										k
Net: 10-19	25	-	25	2	3	7	3	3	4	1	1	5	21
	5%	-	53%	14%	4%	7%	5%	5%	3%	5%	4%	8%	5%
			a										
Net: 20-49	13	-	13	2	2	3	-	1	3	2	*	3	9
	3%	-	27%	11%	3%	3%	-	2%	3%	6%	1%	6%	2%
			a										

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

**QES Q4 2019****D1. How many people does your company employ?**

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
Significance Level: 95%	Total	a	b	c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: 50-99	5	-	5	1	*	2	1	*	1	*	-	1	4
	1%	-	10% a	3%	1%	2%	1%	*	1%	1%	-	2%	1%
Net: 100-249	3	-	3	*	*	1	*	*	*	*	*	1	2
	1%	-	6% a	3%	1%	1%	1%	*	*	1%	*	1%	*
Net: 250+	2	-	2	*	*	*	*	*	*	*	-	*	2
	*	-	4% a	*	*	*	1%	*	*	1%	-	*	*

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

## QES Q4 2019

### D1. How many people does your company employ?

Base: All respondents

	LOCATION			EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0 sole trader	220	115	105	14	198	8	13	207	81	139	53	154	13
	43%	43%	44%	21%	49%	25%	14%	50%	38%	47%	39%	44%	55%
					ce			f		h			
1-9	240	124	116	36	183	21	52	189	101	140	67	164	9
	47%	46%	49%	53%	45%	64%	54%	46%	47%	48%	49%	47%	39%
					d								
10-19	25	15	10	9	14	2	15	11	17	8	7	17	1
	5%	6%	4%	13%	4%	6%	15%	3%	8%	3%	5%	5%	3%
				d			g		i				
20-49	13	9	4	5	7	1	10	3	10	3	5	7	*
	3%	3%	2%	8%	2%	2%	10%	1%	5%	1%	4%	2%	1%
				d			g		i				
50-99	5	3	2	3	2	*	3	1	3	1	2	3	-
	1%	1%	1%	4%	*	1%	3%	*	2%	*	1%	1%	-
				d			g						
100-199	2	1	1	*	1	*	1	*	1	*	*	1	*
	*	*	*	*	*	1%	1%	*	1%	*	*	*	1%
200-249	1	*	1	*	1	*	1	*	1	*	*	1	-
	*	*	*	1%	*	*	1%	*	*	*	*	*	-
250-499	1	*	*	*	*	*	1	*	*	*	*	*	*
	*	*	*	*	*	*	1%	*	*	*	*	*	*
500+	1	1	*	1	1	*	1	*	1	1	1	1	*
	*	*	*	1%	*	*	1%	*	*	*	1%	*	*
<b>NETS</b>													
Net: More than 9	48	30	18	18	26	4	31	16	33	14	16	30	1
	9%	11%	7%	26%	6%	11%	33%	4%	15%	5%	12%	9%	6%
				de			g		i				
<b>BCC NETS</b>													
Net: 0-19	486	255	231	59	395	32	80	406	199	287	127	335	23
	96%	95%	97%	86%	97%	96%	83%	99%	92%	98%	94%	96%	97%
					c			f		h			
Net: 20-199	19	13	6	8	10	1	14	5	14	5	7	11	*
	4%	5%	3%	11%	2%	3%	14%	1%	7%	2%	5%	3%	2%
				d			g		i				

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

## QES Q4 2019

### D1. How many people does your company employ?

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: 200-499	2	1	1	1	1	*	2	*	1	1	1	1	*
	*	*	*	1%	*	1%	2%	*	1%	*	*	*	*
							g						
Net: 500+	1	1	*	1	1	*	1	*	1	1	1	1	*
	*	*	*	1%	*	*	1%	*	*	*	1%	*	*
ONS NETS													
Net: 0-9	460	239	221	50	381	30	65	395	182	278	120	318	22
	91%	89%	93%	74%	94%	89%	67%	96%	85%	95%	88%	91%	94%
					c	c		f		h			
Net: 10-19	25	15	10	9	14	2	15	11	17	8	7	17	1
	5%	6%	4%	13%	4%	6%	15%	3%	8%	3%	5%	5%	3%
				d			g		i				
Net: 20-49	13	9	4	5	7	1	10	3	10	3	5	7	*
	3%	3%	2%	8%	2%	2%	10%	1%	5%	1%	4%	2%	1%
				d			g		i				
Net: 50-99	5	3	2	3	2	*	3	1	3	1	2	3	-
	1%	1%	1%	4%	*	1%	3%	*	2%	*	1%	1%	-
				d			g						
Net: 100-249	3	1	2	1	2	*	2	1	2	1	1	2	*
	1%	*	1%	1%	*	1%	2%	*	1%	*	*	1%	1%
							g						
Net: 250+	2	1	1	1	1	*	2	*	1	1	1	1	*
	*	1%	*	2%	*	1%	2%	*	1%	*	1%	*	1%
							g						

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

## QES Q4 2019

### D2. Which of the following best describes your company sector?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing	3	-	3	3	-	-	-	-	-	-	-	3	-
	1%	-	7%	20%	-	-	-	-	-	-	-	6%	-
			a									l	
Production	14	12	2	14	-	-	-	-	-	-	-	14	-
	3%	3%	4%	80%	-	-	-	-	-	-	-	22%	-
												l	
Construction	44	39	5	-	44	-	-	-	-	-	-	44	-
	9%	8%	10%	-	58%	-	-	-	-	-	-	72%	-
					efghij							l	
Motor trades	6	4	1	-	-	6	-	-	-	-	-	-	6
	1%	1%	3%	-	-	6%	-	-	-	-	-	-	1%
						dgh							
Wholesale	22	20	1	-	-	22	-	-	-	-	-	-	22
	4%	4%	3%	-	-	22%	-	-	-	-	-	-	5%
						dfghij							
Retail	50	43	7	-	-	50	-	-	-	-	-	-	50
	10%	9%	15%	-	-	51%	-	-	-	-	-	-	11%
						dfghij						k	
Transport & storage (inc. postal)	11	9	2	-	-	11	-	-	-	-	-	-	11
	2%	2%	4%	-	-	12%	-	-	-	-	-	-	3%
						dfghij							
Accommodation & food services	9	9	*	-	-	9	-	-	-	-	-	-	9
	2%	2%	1%	-	-	9%	-	-	-	-	-	-	2%
						dfghij							
Information & communication	69	64	5	-	-	-	69	-	-	-	-	-	69
	14%	14%	10%	-	-	-	100%	-	-	-	-	-	15%
							deg hij					k	

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



## QES Q4 2019

### D2. Which of the following best describes your company sector?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Finance & insurance	17	15	2	-	-	-	-	17	-	-	-	-	17
	3%	3%	4%	-	-	-	-	26%	-	-	-	-	4%
						defhij							
Property	32	31	1	-	32	-	-	-	-	-	-	-	32
	6%	7%	3%	-	42%	-	-	-	-	-	-	-	7%
					efghij								k
Professional, scientific & technical	119	111	9	-	-	-	-	-	119	-	-	-	119
	24%	24%	18%	-	-	-	-	-	100%	-	-	-	27%
									defgij				k
Business administration and support services	49	46	3	-	-	-	-	49	-	-	-	-	49
	10%	10%	6%	-	-	-	-	74%	-	-	-	-	11%
								defhij					k
Public administration and defence	1	1	-	-	-	-	-	-	-	1	-	-	1
	*	*	-	-	-	-	-	-	-	2%	-	-	*
Education	13	11	2	-	-	-	-	-	-	13	-	-	13
	3%	2%	5%	-	-	-	-	-	-	47%	-	-	3%
										defghj			
Health	15	13	2	-	-	-	-	-	-	15	-	-	15
	3%	3%	4%	-	-	-	-	-	-	51%	-	-	3%
										defghj			
Arts, entertainment, recreation and other services	35	33	2	-	-	-	-	-	-	-	35	-	35
	7%	7%	3%	-	-	-	-	-	-	-	100%	-	8%
											defghi		k
Other services	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

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

## QES Q4 2019

### D2. Which of the following best describes your company sector?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: Manufacturing	61	51	10	17	44	-	-	-	-	-	-	61	-
	12%	11%	22%	100%	58%	-	-	-	-	-	-	100%	-
			a		efghij							l	
Net: Services	447	410	37	-	32	97	69	66	119	29	35	-	447
	88%	89%	78%	-	42%	100%	100%	100%	100%	100%	100%	-	100%
			b			d	d	d	d	d	d		k
Net: Agriculture, forestry & fishing / production	17	12	5	17	-	-	-	-	-	-	-	17	-
	3%	3%	11%	100%	-	-	-	-	-	-	-	28%	-
			a									l	
Net: Construction / property	76	70	6	-	76	-	-	-	-	-	-	44	32
	15%	15%	13%	-	100%	-	-	-	-	-	-	72%	7%
					efghij							l	
Net: Motor trades / wholesale / retail / transport & storage / accommodation & food services	97	85	12	-	-	97	-	-	-	-	-	-	97
	19%	18%	26%	-	-	100%	-	-	-	-	-	-	22%
						dfghij							k
Net: Finance & insurance/ Business administration & support services	66	61	5	-	-	-	-	66	-	-	-	-	66
	13%	13%	10%	-	-	-	-	100%	-	-	-	-	15%
								defhij					k

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

## QES Q4 2019

### D2. Which of the following best describes your company sector?

Base: All respondents

Significance Level: 95%

Unweighted Total

Weighted Total

Net: Public administration and defence /  
education / health

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

	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
			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
Total	a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326 182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460 48	17	76	97	69	66	119	29	35	61	447
	100%	100% 100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: Public administration and defence / education / health	29	25 4	-	-	-	-	-	-	29	-	-	29
	6%	5% 8%	-	-	-	-	-	-	100%	-	-	6%
									defghj			

## QES Q4 2019

### D2. Which of the following best describes your company sector?

Base: All respondents

	LOCATION			EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing	3	3	-	1	2	-	3	-	3	-	-	3	-
	1%	1%	-	2%	1%	-	4%	-	2%	-	-	1%	-
							g		i				
Production	14	8	6	4	9	-	2	12	11	3	7	6	-
	3%	3%	2%	6%	2%	-	2%	3%	5%	1%	5%	2%	-
				d					i		k		
Construction	44	13	31	11	30	2	18	26	26	18	19	23	2
	9%	5%	13%	16%	7%	7%	19%	6%	12%	6%	14%	7%	7%
			a	d			g		i		k		
Motor trades	6	2	4	1	5	-	1	5	4	2	1	4	-
	1%	1%	2%	1%	1%	-	1%	1%	2%	1%	1%	1%	-
Wholesale	22	13	9	4	14	4	6	16	8	14	10	12	-
	4%	5%	4%	6%	3%	11%	6%	4%	4%	5%	7%	3%	-
						d							
Retail	50	30	20	10	38	2	15	34	26	24	19	29	2
	10%	11%	8%	15%	9%	5%	16%	8%	12%	8%	14%	8%	7%
							g						
Transport & storage (inc. postal)	11	4	8	1	8	2	5	7	6	5	5	6	1
	2%	1%	3%	2%	2%	6%	5%	2%	3%	2%	3%	2%	5%
							g						
Accommodation & food services	9	4	5	1	7	1	3	6	5	3	4	4	1
	2%	1%	2%	1%	2%	4%	3%	1%	3%	1%	3%	1%	4%
Information & communication	69	42	27	6	61	3	7	62	19	50	10	50	9
	14%	16%	11%	8%	15%	8%	8%	15%	9%	17%	7%	14%	38%
							f			h		j	
Finance & insurance	17	9	8	3	14	*	3	14	3	14	2	15	1
	3%	3%	4%	4%	3%	1%	3%	3%	1%	5%	1%	4%	3%
										h			
Property	32	22	10	4	25	4	4	29	17	15	8	23	2
	6%	8%	4%	5%	6%	12%	4%	7%	8%	5%	6%	6%	8%

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

## QES Q4 2019

### D2. Which of the following best describes your company sector?

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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Professional, scientific & technical	119	62	58	10	105	5	15	104	50	69	31	86	2
	24%	23%	24%	15%	26%	14%	16%	25%	23%	24%	23%	25%	7%
					c			f					
Business administration and support services	49	26	23	5	40	4	4	45	13	36	8	38	3
	10%	10%	10%	7%	10%	13%	4%	11%	6%	12%	6%	11%	12%
								f		h			
Public administration and defence	1	-	1	-	1	-	-	1	-	1	-	-	1
	*	-	*	-	*	-	-	*	-	*	-	-	3%
Education	13	7	7	2	11	1	2	11	6	8	2	11	*
	3%	2%	3%	2%	3%	4%	3%	3%	3%	3%	2%	3%	*
Health	15	7	7	4	9	2	4	10	7	7	5	9	-
	3%	3%	3%	5%	2%	6%	5%	2%	3%	3%	4%	3%	-
Arts, entertainment, recreation and other services	35	19	16	1	30	3	3	32	11	24	5	29	2
	7%	7%	7%	2%	7%	9%	3%	8%	5%	8%	3%	8%	7%
					c			f				j	
Other services	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>NETS</b>													
Net: Manufacturing	61	24	36	17	42	2	23	37	40	20	26	33	2
	12%	9%	15%	25%	10%	7%	24%	9%	19%	7%	19%	9%	7%
			a	de			g		i		k		
Net: Services	447	245	202	51	365	31	73	374	175	272	110	315	22
	88%	91%	85%	75%	90%	93%	76%	91%	81%	93%	81%	91%	93%
		b			c	c		f		h		j	
Net: Agriculture, forestry & fishing / production	17	11	6	6	11	-	5	12	14	3	7	10	-
	3%	4%	2%	8%	3%	-	5%	3%	7%	1%	5%	3%	-
				d					i				

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

## QES Q4 2019

### D2. Which of the following best describes your company sector?

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: Construction / property	76	35	41	15	55	6	22	54	43	33	26	46	4
	15%	13%	17%	22%	14%	18%	23%	13%	20%	11%	19%	13%	15%
				d			g		i				
Net: Motor trades / wholesale / retail / transport & storage / accommodation & food services	97	52	45	18	71	9	30	67	49	48	39	55	4
	19%	19%	19%	26%	17%	26%	31%	16%	23%	16%	28%	16%	15%
				d			g				k		
Net: Finance & insurance/ Business administration & support services	66	34	32	8	54	5	7	59	16	50	10	52	4
	13%	13%	13%	11%	13%	15%	7%	14%	7%	17%	7%	15%	15%
							f			h		j	
Net: Public administration and defence / education / health	29	14	15	5	20	3	7	22	13	16	8	20	1
	6%	5%	6%	8%	5%	10%	7%	5%	6%	5%	6%	6%	3%
Columns Tested: a-b-c-d-e-f-g-h-i-j-k-l													

# **QES Q4 2019**

## **D3. Which London borough is your business based in?**

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Barking and Dagenham	4	2	2	-	-	1	-	-	2	1	-	-	4
	1%	1%	3%	-	-	1%	-	-	2%	4%	-	-	1%
			a										
Barnet	26	24	3	3	4	7	-	6	3	2	1	6	20
	5%	5%	5%	16%	5%	7%	-	9%	3%	7%	4%	11%	4%
												l	
Bexley	7	5	2	-	2	2	-	*	2	-	1	*	6
	1%	1%	3%	-	3%	2%	-	1%	2%	-	2%	1%	1%
Brent	12	12	1	-	2	2	-	1	5	3	-	2	11
	2%	3%	2%	-	2%	2%	-	2%	4%	10%	-	3%	2%
										efj			
Bromley	11	10	1	-	4	6	-	*	*	1	1	4	8
	2%	2%	2%	-	5%	6%	-	*	*	2%	2%	6%	2%
						gh						l	
City of London	53	42	11	2	5	13	3	8	18	3	1	5	48
	10%	9%	24%	13%	6%	14%	5%	13%	15%	10%	3%	8%	11%
			a			j			j				
City of Westminster	27	23	4	1	10	4	*	3	4	3	1	1	26
	5%	5%	8%	5%	13%	5%	*	5%	4%	10%	3%	2%	6%
					efh								
Camden	35	32	3	-	2	8	10	4	9	1	2	-	35
	7%	7%	7%	-	3%	8%	14%	6%	7%	3%	5%	-	8%
							di					-	k
Croydon	11	10	1	-	2	1	3	5	-	1	-	2	10
	2%	2%	2%	-	2%	1%	4%	7%	-	5%	-	3%	2%
								eh		h			
Ealing	22	19	3	-	4	4	6	4	4	-	1	1	21
	4%	4%	6%	-	5%	4%	8%	6%	3%	-	3%	1%	5%
							i						

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

# QES Q4 2019

## D3. Which London borough is your business based in?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Enfield	7	7	*	-	*	2	-	1	3	-	-	*	7
	1%	1%	*	-	*	2%	-	2%	3%	-	-	*	1%
Greenwich	9	8	2	*	*	3	3	2	-	1	-	1	9
	2%	2%	4%	1%	1%	3%	4%	3%	-	3%	-	1%	2%
Hackney	10	9	1	*	-	2	3	1	-	2	2	*	10
	2%	2%	1%	*	-	2%	4%	2%	-	7% dh	5% h	*	2%
Hammersmith and Fulham	22	22	*	3	2	6	6	1	2	-	2	5	17
	4%	5% b	*	18%	3%	6%	9% i	2%	2%	-	5%	8%	4%
Haringey	16	14	1	3	1	4	-	3	2	2	1	3	12
	3%	3%	3%	18%	1%	4%	-	5%	2%	6%	3%	5%	3%
Harrow	21	21	1	-	5	5	3	2	2	1	3	3	18
	4%	4%	2%	-	6%	5%	4%	3%	2%	5%	8%	5%	4%
Havering	7	6	1	-	*	*	5	-	*	1	1	*	7
	1%	1%	3%	-	*	*	8% degh	-	*	2%	2%	1%	2%
Hillingdon	10	9	1	-	*	2	5	2	*	-	*	*	10
	2%	2%	1%	-	*	2%	8% dhi	3%	*	-	1%	*	2%
Hounslow	14	14	*	-	3	1	-	1	7	-	1	2	13
	3%	3%	1%	-	4%	1%	-	2%	6%	-	4%	3%	3%
Islington	13	13	*	-	2	-	-	*	6	1	4	-	13
	3%	3% b	*	-	3%	-	-	*	5% e	3% e	13% defg	-	3%
Kensington and Chelsea	8	8	1	*	*	2	*	4	*	-	1	*	8
	2%	2%	1%	2%	*	3%	*	7% dh	*	-	3%	1%	2%

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



# **QES Q4 2019**

## **D3. Which London borough is your business based in?**

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Kingston upon Thames	8	7	*	-	-	*	*	1	3	2	1	-	8
	1%	2%	1%	-	-	*	*	2%	3%	7% de	2%	-	2%
Lambeth	15	15	-	-	-	4	6	1	2	1	1	-	15
	3%	3%	-	-	-	4%	9%	2%	2%	3%	3%	-	3%
Lewisham	11	10	*	-	2	3	3	1	-	-	2	2	9
	2%	2%	*	-	3%	3%	4%	2%	-	-	5% h	3%	2%
Merton	16	15	1	-	4	*	-	-	10	-	1	4	12
	3%	3%	2%	-	5% e	*	-	-	9% egi	-	4%	6%	3%
Newham	8	7	1	-	4	1	1	1	-	1	-	-	8
	2%	2%	2%	-	5% h	1%	2%	2%	-	3%	-	-	2%
Redbridge	12	12	-	-	5	2	3	2	-	1	-	3	9
	2%	3% b	-	-	6% h	2%	4%	3%	-	2%	-	5%	2%
Richmond upon Thames	13	13	1	-	*	2	-	2	7	-	1	*	13
	3%	3%	1%	-	*	2%	-	3%	6%	-	4%	*	3%
Southwark	20	18	2	-	4	4	6	-	5	1	-	4	16
	4%	4%	3%	-	6%	4%	9% gj	-	4%	3%	-	7%	4%
Sutton	15	15	*	-	6	4	*	1	2	1	1	6	9
	3%	3% b	*	-	8% h	4%	*	2%	1%	5%	2%	11% l	2%
Tower Hamlets	11	8	3	1	*	-	3	*	5	*	1	2	9
	2%	2%	6% a	7%	*	-	4% e	1%	4% e	1%	3%	3%	2%

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

## QES Q4 2019

### D3. Which London borough is your business based in?

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Waltham Forest	12	12	-	3	-	1	-	-	5	-	3	3	9
	2%	3%	-	16%	-	1%	-	-	4%	-	8%	5%	2%
		b									degi		
Wandsworth	21	18	3	1	4	1	1	3	9	-	2	3	18
	4%	4%	6%	3%	5%	1%	2%	5%	7%	-	5%	4%	4%
									ei				
Outside London	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>NETS</b>													
Net: Inner London	269	239	30	11	35	52	42	34	62	14	19	24	245
	53%	52%	63%	66%	46%	54%	61%	52%	52%	49%	54%	40%	55%
			a										k
Net: Outer London	239	221	18	6	41	45	27	32	58	15	16	36	202
	47%	48%	37%	34%	54%	46%	39%	48%	48%	51%	46%	60%	45%
		b										l	

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

## QES Q4 2019

### D3. Which London borough is your business based in?

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Barking and Dagenham	4	-	4	-	4	*	1	3	1	3	2	2	-
	1%	-	2% a	-	1%	*	1%	1%	*	1%	1%	1%	-
Barnet	26	-	26	2	22	3	3	24	12	15	9	17	1
	5%	-	11% a	2%	5%	10% c	3%	6%	5%	5%	6%	5%	3%
Bexley	7	-	7	2	5	-	6	1	5	1	3	4	*
	1%	-	3% a	3%	1%	-	6% g	* g	2%	* g	2%	1%	2%
Brent	12	-	12	1	11	-	1	12	9	4	7	6	-
	2%	-	5% a	1%	3%	-	1%	3%	4%	1%	5% k	2%	-
Bromley	11	-	11	*	10	1	1	11	6	5	2	8	1
	2%	-	5% a	1%	2%	3%	1%	3%	3%	2%	1%	2%	5%
City of London	53	53	-	24	27	3	27	26	29	24	18	29	6
	10%	20% b	-	35% de	7%	8%	28% g	6%	13%	8%	13%	8%	24%
City of Westminster	27	27	-	1	19	7	5	22	12	14	5	20	2
	5%	10% b	-	1%	5%	22% cd	6%	5%	6%	5%	4%	6%	9%
Camden	35	35	-	3	29	3	3	32	12	23	8	27	-
	7%	13% b	-	4%	7%	9%	3%	8% f	6%	8%	6%	8%	-
Croydon	11	-	11	2	9	*	2	9	5	6	3	8	1
	2%	-	5% a	3%	2%	*	2%	2%	3%	2%	2%	2%	3%
Ealing	22	-	22	2	20	*	5	16	7	15	4	18	*
	4%	-	9% a	3%	5%	*	6%	4%	3%	5%	3%	5%	1%
Enfield	7	-	7	2	4	-	3	3	1	5	4	2	-
	1%	-	3% a	3%	1%	-	3% g	1%	1%	2%	3% k	1%	-
Greenwich	9	-	9	1	4	4	2	7	3	7	4	5	1
	2%	-	4% a	2%	1%	11% cd	2%	2%	1%	2%	3%	1%	4%

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

## QES Q4 2019

### D3. Which London borough is your business based in?

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hackney	10	10	-	-	9	1	2	8	2	7	*	9	1
	2%	4%	-	-	2%	3%	2%	2%	1%	3%	*	3%	4%
		b											
Hammersmith and Fulham	22	22	-	2	19	1	2	20	6	16	12	10	*
	4%	8%	-	3%	5%	4%	2%	5%	3%	5%	9%	3%	*
		b									k		
Haringey	16	16	-	2	12	2	*	15	6	10	4	11	-
	3%	6%	-	2%	3%	5%	*	4% f	3%	3%	3%	3%	-
		b											
Harrow	21	-	21	2	19	-	4	18	8	13	9	13	-
	4%	-	9% a	4%	5%	-	4%	4%	4%	4%	6%	4%	-
Havering	7	-	7	1	7	-	1	6	6	1	1	6	-
	1%	-	3% a	1%	2%	-	1%	2%	3% i	*	1%	2%	-
Hillingdon	10	-	10	*	10	*	*	10	4	6	4	6	-
	2%	-	4% a	*	2%	*	*	2%	2%	2%	3%	2%	-
Hounslow	14	-	14	3	11	*	3	12	6	8	4	10	*
	3%	-	6% a	4%	3%	*	3%	3%	3%	3%	3%	3%	*
Islington	13	13	-	*	13	-	1	12	11	3	1	12	-
	3%	5%	-	*	3%	-	1%	3%	5% i	1%	1%	4%	-
		b											
Kensington and Chelsea	8	8	-	-	7	1	2	7	1	8	*	7	1
	2%	3%	-	-	2%	4% c	2%	2%	*	3% h	*	2%	6%
		b											
Kingston upon Thames	8	-	8	1	7	-	1	7	1	6	3	5	-
	1%	-	3% a	1%	2%	-	1%	2%	1%	2%	2%	1%	-
Lambeth	15	15	-	-	14	1	1	14	-	15	1	11	3
	3%	5%	-	-	3%	4% c	1%	3%	-	5% h	1%	3%	12%
		b											
Lewisham	11	11	-	*	10	-	*	10	1	9	1	6	3
	2%	4%	-	*	3%	-	*	3% f	1%	3% h	1%	2%	12%
		b											

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

## QES Q4 2019

### D3. Which London borough is your business based in?

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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Merton	16	-	16	2	13	2	2	13	8	8	4	10	2
	3%	-	7% a	2%	3%	5%	2%	3%	4%	3%	3%	3%	7%
Newham	8	8	-	1	7	-	1	7	5	3	3	5	-
	2%	3% b	-	2%	2%	-	1%	2%	3%	1%	2%	2%	-
Redbridge	12	-	12	1	11	-	3	10	7	5	3	10	-
	2%	-	5% a	1%	3%	-	3%	2%	3%	2%	2%	3%	-
Richmond upon Thames	13	-	13	2	11	-	3	10	3	10	4	9	-
	3%	-	6% a	3%	3%	-	3%	3%	1%	3%	3%	3%	-
Southwark	20	20	-	*	19	*	*	20	10	10	4	16	-
	4%	7% b	-	1%	5% c	1%	*	5% f	5%	3%	3%	5%	-
Sutton	15	-	15	1	14	-	6	10	9	6	5	10	*
	3%	-	6% a	1%	4%	-	6% g	2%	4%	2%	4%	3%	*
Tower Hamlets	11	11	-	*	10	1	1	9	4	7	*	10	-
	2%	4% b	-	*	2%	2%	1%	2%	2%	2%	*	3% j	-
Waltham Forest	12	-	12	6	4	1	2	9	4	8	3	7	2
	2%	-	5% a	9% d	1%	4%	3%	2%	2%	3%	2%	2%	7%
Wandsworth	21	21	-	4	14	2	2	19	10	11	3	18	-
	4%	8% b	-	6%	4%	6%	2%	5%	5%	4%	2%	5%	-
Outside London	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>NETS</b>													
Net: Inner London	269	269	-	37	210	22	48	221	110	159	61	192	16
	53%	100% b	-	54%	52%	66%	50%	54%	51%	55%	45%	55% j	68%

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

**QES Q4 2019****D3. Which London borough is your business based in?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: Outer London	239	-	239	31	196	11	48	191	106	133	75	156	8
	47%	-	100%	46%	48%	34%	50%	46%	49%	45%	55%	45%	32%
			a								k		

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

**QES Q4 2019**

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

**SUMMARY TABLE**

Base: All respondents

	Total	Up	Same	Down	Mean
Cashflow	508	95	288	124	-.1
	100%	19%	57%	25%	
Domestic sales	508	90	296	122	-.1
	100%	18%	58%	24%	
Business domestic orders	508	83	311	114	-.1
	100%	16%	61%	22%	
Employment	508	38	408	61	*
	100%	8%	80%	12%	

**QES Q4 2019****Q1\_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Domestic sales**

Base: All respondents

		BUSINESS SIZE			INDUSTRY							MANUFACTURING/SERVICES		
					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
Total		0-9	10+											
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j		k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	90	77	13	4	11	28	4	8	19	4	13	14	76
		18%	17%	28%	24%	14%	29%	5%	11%	16%	14%	37%	24%	17%
			a			dfghi					dfghi			
Same	(0)	296	269	26	12	46	47	47	42	69	15	17	40	255
		58%	58%	55%	69%	60%	49%	69%	64%	58%	52%	49%	66%	57%
							e	e						
Down	(-1)	122	114	8	1	20	21	18	16	31	10	5	6	116
		24%	25%	17%	7%	26%	22%	26%	25%	26%	34%	14%	10%	26%
			b							j				k
Mean score		-.1	-.1	.1	.2	-.1	.1	-.2	-.1	-.1	-.2	.2	.1	-.1
				a			fgi					dfghi	l	
Standard deviation		.64	.64	.67	.55	.63	.71	.52	.59	.64	.67	.68	.57	.65
Standard error		.03	.04	.05	.15	.08	.06	.08	.07	.07	.09	.10	.08	.03

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



**QES Q4 2019****Q1\_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Domestic sales**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	90	48	42	26	62	2	29	62	46	45	40	50	-
		18%	18%	18%	38%	15%	7%	30%	15%	21%	15%	29%	14%	-
					de			g				k		
Same	(0)	296	149	147	34	255	7	46	250	144	152	63	229	4
		58%	55%	61%	49%	63%	22%	48%	61%	67%	52%	46%	66%	17%
					e	ce		f		i		j		
Down	(-1)	122	72	50	8	90	24	22	100	26	96	33	69	20
		24%	27%	21%	12%	22%	71%	22%	24%	12%	33%	24%	20%	83%
					c	cd				h				
Mean score		-.1	-.1	*	.3	-.1	-.6	.1	-.1	.1	-.2	.1	-.1	-.8
					de	e		g		i				
Standard deviation		.64	.66	.62	.67	.61	.62	.72	.62	.57	.67	.73	.58	.39
Standard error		.03	.04	.04	.06	.03	.10	.05	.03	.04	.04	.06	.03	.08

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

**QES Q4 2019****Q1\_2. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Business domestic orders**

Base: All respondents

		BUSINESS SIZE			INDUSTRY								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
Significance Level: 95%		Total	0-9	10+	*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	83	69	13	-	11	25	7	11	18	4	7	7	76
		16%	15%	28%	-	14%	26%	10%	17%	15%	16%	20%	11%	17%
				a			f							
Same	(0)	311	284	28	13	48	52	45	41	74	15	23	44	267
		61%	62%	58%	75%	63%	53%	66%	63%	62%	51%	67%	72%	60%
Down	(-1)	114	108	7	4	17	21	17	14	27	9	5	10	104
		22%	23%	14%	25%	22%	21%	25%	21%	23%	33%	14%	17%	23%
				b							j			
Mean score		-.1	-.1	.1	-.2	-.1	*	-.2	*	-.1	-.2	.1	-.1	-.1
				a			i							
Standard deviation		.62	.61	.64	.45	.60	.69	.57	.62	.61	.69	.58	.53	.63
Standard error		.03	.03	.05	.12	.07	.06	.09	.08	.06	.09	.08	.07	.03

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

**QES Q4 2019****Q1\_2. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Business domestic orders**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	83	40	43	26	55	2	31	52	42	40	33	49	1
		16%	15%	18%	38% de	13%	7%	32% g	13%	20%	14%	24% k	14%	3%
Same	(0)	311	161	150	36	269	6	44	267	144	167	71	235	6
		61%	60%	63%	53% e	66% ce	19%	46%	65% f	67% i	57%	52%	67% j	25%
Down	(-1)	114	68	46	6	83	25	21	93	29	85	33	64	17
		22%	25%	19%	9%	20% c	74% cd	22%	23%	13% h	29%	24%	19%	72%
Mean score		-.1	-.1	*	.3 de	-.1 e	-.7	.1 g	-.1	.1 i	-.2	*	*	-.7
Standard deviation		.62	.63	.61	.63	.58	.61	.73	.59	.57	.64	.70	.57	.53
Standard error		.03	.04	.04	.06	.03	.10	.05	.03	.04	.04	.06	.03	.11

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

**QES Q4 2019****Q1\_5. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Employment**

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
Significance Level: 95%		a	b		*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	38	27	11	4	5	9	2	3	8	5	3	8	30
		8%	6%	24%	21%	6%	9%	3%	5%	7%	17%	8%	13%	7%
			a								fg			
Same	(0)	408	378	30	13	58	75	56	55	101	21	30	48	360
		80%	82%	64%	79%	76%	77%	81%	84%	84%	73%	85%	79%	81%
			b											
Down	(-1)	61	55	6	-	14	13	11	8	10	3	2	5	57
		12%	12%	12%	-	18%	13%	17%	12%	9%	10%	7%	8%	13%
Mean score		*	-.1	.1	.2	-.1	*	-.1	-.1	*	.1	*	.1	-.1
			a								f			
Standard deviation		.44	.42	.60	.42	.48	.48	.42	.40	.40	.52	.39	.46	.44
Standard error		.02	.02	.04	.12	.06	.04	.07	.05	.04	.07	.06	.06	.02

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

**QES Q4 2019****Q1\_5. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Employment**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	38	15	23	18	18	2	24	14	25	13	16	21	2
		8%	6%	10%	27%	5%	6%	25%	3%	12%	4%	12%	6%	8%
					de			g		i		k		
Same	(0)	408	218	191	41	350	17	59	349	175	233	99	304	5
		80%	81%	80%	60%	86%	52%	61%	85%	81%	80%	73%	87%	21%
						ce		f					j	
Down	(-1)	61	36	25	9	38	14	13	48	15	46	21	23	17
		12%	13%	10%	13%	9%	42%	14%	12%	7%	16%	15%	7%	72%
							cd				h	k		
Mean score		*	-.1	*	.1	*	-.4	.1	-.1	*	-.1	*	*	-.6
					de	e		g		i				
Standard deviation		.44	.43	.45	.62	.37	.60	.62	.38	.43	.44	.52	.36	.63
Standard error		.02	.03	.03	.06	.02	.10	.05	.02	.03	.03	.04	.02	.13

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

**QES Q4 2019****Q1\_6. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Cashflow**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
				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	
Total		0-9	10+											
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	95	83	12	9	17	16	7	7	20	5	13	24	71
		19%	18%	26%	56%	22%	17%	10%	11%	17%	19%	37%	40%	16%
			a								efghi	l		
Same	(0)	288	263	25	6	44	57	36	43	73	14	15	31	257
		57%	57%	54%	37%	57%	59%	51%	65%	61%	50%	44%	51%	58%
								j						
Down	(-1)	124	115	10	1	16	23	26	16	27	9	7	5	119
		25%	25%	21%	7%	20%	24%	38%	24%	22%	31%	19%	9%	27%
							dj						k	
Mean score		-.1	-.1	*	.5	*	-.1	-.3	-.1	-.1	-.1	.2	.3	-.1
						f						efghi	l	
Standard deviation		.66	.65	.69	.65	.66	.64	.64	.58	.62	.71	.74	.63	.64
Standard error		.03	.04	.05	.18	.08	.06	.10	.07	.07	.09	.11	.08	.03

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

**QES Q4 2019****Q1\_6. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Cashflow**

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: 95%			a	b	c	d	e	f	g	h	i	j	k	*l
Unweighted Total		508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	95	48	47	29	64	2	30	65	47	48	40	55	-
		19%	18%	20%	43% de	16%	6%	31% g	16%	22%	16%	29% k	16%	-
Same	(0)	288	148	141	33	249	6	48	241	139	150	63	221	5
		57%	55%	59%	48% e	61% ce	19%	49%	58%	64% i	51%	46%	63% j	19%
Down	(-1)	124	74	51	6	94	25	19	106	30	95	33	72	19
		25%	27%	21%	9% c	23% cd	75%	19%	26%	14%	32% h	24%	21%	81%
Mean score		-.1	-.1	*	.3 de	-.1 e	-.7	.1 g	-.1	.1 i	-.2	*	*	-.8
Standard deviation		.66	.67	.64	.64	.62	.58	.70	.64	.59	.68	.73	.60	.40
Standard error		.03	.04	.04	.06	.03	.09	.05	.04	.04	.04	.06	.03	.09

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

**QES Q4 2019****Q2\_SUM. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****SUMMARY TABLE**

Base: All respondents

	Total	Up	Same	Down	My business does not export outside the UK	Mean
Business export orders	508	50	143	39	275	*
	100%	10%	28%	8%	54%	
Export sales	508	47	145	36	280	*
	100%	9%	29%	7%	55%	



**QES Q4 2019****Q2\_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Export sales**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
						Motor trades / wholesale / retail / transport & storage / accommodation & food services		Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services			
Total		0-9	10+	Agriculture, forestry & fishing / production	Construction / property		Information & communication					Manufacturing	Services	
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	47	40	8	-	3	14	4	6	17	1	3	3	44
		9%	9%	16%	-	4%	14%	5%	9%	14%	4%	8%	5%	10%
				a			di			di				
Same	(0)	145	121	24	16	21	36	14	15	25	7	11	29	116
		29%	26%	50%	92%	27%	37%	21%	23%	21%	25%	31%	48%	26%
				a			h						l	
Down	(-1)	36	31	6	1	3	10	3	3	13	2	2	1	35
		7%	7%	12%	7%	5%	10%	4%	4%	11%	6%	5%	2%	8%
				a										
My business does not export outside the UK		280	269	10	*	49	38	48	42	64	18	20	27	252
		55%	58%	22%	*	64%	39%	70%	64%	53%	64%	56%	45%	56%
			b			e		e	e	e	e	e		
Mean score		*	*	.1	-.1	*	.1	*	.1	.1	-.1	.1	*	*
Standard deviation		.60	.60	.61	.27	.49	.63	.58	.60	.74	.57	.55	.36	.64
Standard error		.04	.05	.05	.08	.09	.07	.13	.11	.10	.11	.12	.06	.04

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

## QES Q4 2019

**Q2\_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of:**

### Export sales

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	47	24	23	18	28	1	20	27	28	19	22	26	-
		9%	9%	10%	26% de	7%	4%	21% g	7%	13% i	6%	16% k	7%	-
Same	(0)	145	91	54	23	117	6	39	106	84	61	41	102	1
		29%	34% b	23%	33%	29%	17%	41% g	26%	39% i	21%	30%	29%	5%
Down	(-1)	36	19	18	5	27	4	13	23	13	24	13	20	3
		7%	7%	7%	8%	7%	12%	14% g	6%	6%	8%	10%	6%	13%
My business does not export outside the UK		280	136	144	23	235	22	24	256	91	189	60	200	19
		55%	50%	60% a	33%	58% c	66% c	25%	62% f	42%	65% h	44%	58% j	82%
Mean score		*	*	.1	.3 d	*	-.2	.1	*	.1 i	*	.1	*	-.7
Standard deviation		.60	.57	.66	.66	.57	.69	.68	.57	.56	.64	.67	.56	.50
Standard error		.04	.05	.06	.07	.04	.16	.06	.05	.04	.06	.07	.04	.18

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

**QES Q4 2019****Q2\_2. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Business export orders**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
						Motor trades / wholesale / retail / transport & storage / accommodation & food services		Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services			
Total		0-9	10+	Agriculture, forestry & fishing / production	Construction / property		Information & communication					Manufacturing	Services	
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	50	39	11	2	3	15	4	6	14	3	3	5	45
		10%	8%	23% a	13%	4%	15% d	5%	9%	12%	10%	9%	9%	10%
Same	(0)	143	124	19	14	22	30	14	16	30	5	12	26	117
		28%	27%	40% a	80%	28%	31%	20%	24%	25%	19%	35%	43% l	26%
Down	(-1)	39	32	7	1	2	14	3	4	12	2	2	1	38
		8%	7%	15% a	7%	2%	15% d	4%	6%	10%	7%	5%	2%	8%
My business does not export outside the UK		275	265	10	*	49	38	48	40	63	18	18	28	247
		54%	58% b	22%	*	65% e	39%	70% e	61% e	53% e	64% e	51%	46%	55%
Mean score		*	*	.1	.1	.1	*	*	.1	*	.1	.1	.1	*
Standard deviation		.62	.60	.71	.46	.44	.71	.58	.63	.68	.72	.54	.44	.64
Standard error		.04	.05	.06	.13	.08	.08	.13	.11	.09	.14	.10	.08	.04

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

**QES Q4 2019****Q2\_2. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Business export orders**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	50	26	24	21	28	2	23	27	33	17	22	28	1
		10%	10%	10%	30% de	7%	5%	24% g	6%	16% i	6%	16% k	8%	3%
Same	(0)	143	85	58	19	120	4	35	108	78	65	38	102	3
		28%	32%	24%	28%	29% e	13%	36% g	26%	36% i	22%	28%	29%	14%
Down	(-1)	39	24	16	4	29	6	13	27	14	26	16	21	2
		8%	9%	7%	6%	7%	19% cd	13% g	6%	6%	9%	12% k	6%	8%
My business does not export outside the UK		275	134	141	24	230	21	25	250	90	185	60	197	18
		54%	50%	59% a	36%	57% c	62% c	26%	61% f	42%	63% h	44%	57% j	75%
Mean score		*	*	.1	.4 d	*	-.4	.2 g	*	.2 i	-.1	.1	*	-.2
Standard deviation		.62	.61	.64	.65	.57	.73	.70	.58	.60	.63	.71	.57	.69
Standard error		.04	.05	.06	.07	.04	.16	.06	.05	.05	.06	.07	.04	.21

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

**QES Q4 2019****Q2\_SUM. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****SUMMARY TABLE**

Base: All those who have export sales / export orders

	Total	Up	Same	Down	My business does not export outside the UK	Mean
Business export orders	233	50	143	39	-	*
	100%	22%	62%	17%	-	
Export sales	228	47	145	36	-	*
	100%	21%	63%	16%	-	

**QES Q4 2019****Q2\_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Export sales**

Base: All those who have export sales

		BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
							Motor trades / wholesale / retail / transport & storage / accommodation & food services		Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services		
		Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property		Information & communication					Manufacturing	Services
Significance Level: 95%			a	b	*c	d	e	*f	g	h	*i	*j	k	l
Unweighted Total		284	137	147	12	30	88	21	30	53	27	23	34	250
Weighted Total		228	191	37	17	27	59	21	24	56	10	15	33	195
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	47	40	8	-	3	14	4	6	17	1	3	3	44
		21%	21%	21%	-	11%	23%	17%	25%	31%	11%	19%	9%	23%
										d				
Same	(0)	145	121	24	16	21	36	14	15	25	7	11	29	116
		63%	63%	64%	93%	76%	61%	68%	64%	46%	70%	71%	87%	59%
						h							l	
Down	(-1)	36	31	6	1	3	10	3	3	13	2	2	1	35
		16%	16%	15%	7%	13%	16%	14%	11%	23%	18%	10%	4%	18% k
My business does not export outside the UK		-	-	-	-	-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-	-	-	-	-
Mean score		*	*	.1	-.1	*	.1	*	.1	.1	-.1	.1	*	*
Standard deviation		.60	.60	.61	.27	.49	.63	.58	.60	.74	.57	.55	.36	.64
Standard error		.04	.05	.05	.08	.09	.07	.13	.11	.10	.11	.12	.06	.04

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

## QES Q4 2019

**Q2\_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of:**

### Export sales

Base: All those who have export sales

		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: 95%			a	b	c	d	*e	f	g	h	i	j	k	*l
Unweighted Total		284	154	130	86	179	19	146	138	172	112	103	173	8
Weighted Total		228	133	95	46	172	11	73	156	125	104	76	148	4
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	47	24	23	18	28	1	20	27	28	19	22	26	-
		21%	18%	24%	39%	16%	13%	28%	17%	23%	18%	28%	17%	-
					d			g				k		
Same	(0)	145	91	54	23	117	6	39	106	84	61	41	102	1
		63%	68%	57%	50%	68%	51%	54%	68%	67%	59%	54%	69%	26%
					c			f				j		
Down	(-1)	36	19	18	5	27	4	13	23	13	24	13	20	3
		16%	14%	18%	11%	16%	36%	18%	15%	10%	23% h	17%	13%	74%
My business does not export outside the UK		-	-	-	-	-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-	-	-	-	-
Mean score		*	*	.1	.3	*	-.2	.1	*	.1	*	.1	*	-.7
					d			i						
Standard deviation		.60	.57	.66	.66	.57	.69	.68	.57	.56	.64	.67	.56	.50
Standard error		.04	.05	.06	.07	.04	.16	.06	.05	.04	.06	.07	.04	.18

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

**QES Q4 2019****Q2\_2. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Business export orders**

Base: All those who have export orders

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
				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
Total		0-9	10+										
Significance Level: 95%		a	b	*c	*d	e	*f	g	h	*i	*j	k	l
Unweighted Total		289	141	148	12	29	88	21	32	54	27	33	256
Weighted Total		233	196	37	17	27	59	21	26	56	10	33	200
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	50	39	11	2	3	15	4	6	14	3	5	45
		22%	20%	30%	13%	12%	25%	18%	24%	25%	27%	16%	22%
Same	(0)	143	124	19	14	22	30	14	16	30	5	26	117
		62%	64%	51%	80%	81%	51%	68%	61%	54%	53%	79%	59%
			b									l	
Down	(-1)	39	32	7	1	2	14	3	4	12	2	1	38
		17%	16%	20%	7%	7%	24%	15%	15%	21%	20%	4%	19%
												k	
My business does not export outside the UK		-	-	-	-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-	-	-	-
Mean score		*	*	.1	.1	.1	*	*	.1	*	.1	.1	*
Standard deviation		.62	.60	.71	.46	.44	.71	.58	.63	.68	.72	.44	.64
Standard error		.04	.05	.06	.13	.08	.08	.13	.11	.09	.14	.08	.04

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



## QES Q4 2019

**Q2\_2. Excluding seasonality, how have the last three months compared to the previous three months in terms of:**

### Business export orders

Base: All those who have export orders

		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: 95%			a	b	c	d	*e	f	g	h	i	j	k	*l
Unweighted Total		289	156	133	84	184	21	144	145	171	118	101	177	11
Weighted Total		233	135	97	44	176	12	71	162	126	107	76	151	6
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	50	26	24	21	28	2	23	27	33	17	22	28	1
		22%	20%	24%	47%	16%	12%	33%	16%	27%	15%	28%	18%	11%
					d			g		i				
Same	(0)	143	85	58	19	120	4	35	108	78	65	38	102	3
		62%	63%	59%	44%	68%	36%	49%	67%	62%	61%	50%	67%	57%
					c			f				j		
Down	(-1)	39	24	16	4	29	6	13	27	14	26	16	21	2
		17%	17%	16%	9%	16%	52%	18%	16%	11%	24%	21%	14%	32%
										h				
My business does not export outside the UK		-	-	-	-	-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-	-	-	-	-
Mean score		*	*	.1	.4	*	-.4	.2	*	.2	-.1	.1	*	-.2
					d			g		i				
Standard deviation		.62	.61	.64	.65	.57	.73	.70	.58	.60	.63	.71	.57	.69
Standard error		.04	.05	.06	.07	.04	.16	.06	.05	.05	.06	.07	.04	.21

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

**QES Q4 2019****Q3. How do you expect your workforce size to change over the next three months?**

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	68	50	18	6	15	18	6	8	10	5	1	17	51
	13%	11%	38%	32%	19%	18%	8%	11%	9%	18%	4%	27%	11%
		a			hj	hj				j		l	
Stay the same	407	381	26	11	55	71	61	54	105	20	30	42	365
	80%	83%	55%	68%	73%	73%	88%	81%	88%	71%	87%	69%	82%
		b					i		dei		ei		k
Fall	33	30	4	-	6	9	3	5	5	3	3	2	31
	7%	6%	8%	-	8%	9%	4%	7%	4%	11%	9%	4%	7%

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

**QES Q4 2019****Q3. How do you expect your workforce size to change over the next three months?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	68	37	31	68	-	-	51	17	40	28	35	28	5
	13%	14%	13%	100% de	-	-	53% g	4%	19% i	10%	26% k	8%	20%
Stay the same	407	210	196	-	407	-	41	366	168	239	91	305	11
	80%	78%	82%	-	100% ce	-	42%	89% f	78%	82%	67%	88% j	47%
Fall	33	22	11	-	-	33	5	29	8	26	10	15	8
	7%	8%	5%	-	-	100% cd	5%	7%	4%	9% h	7%	4%	34%

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

**QES Q4 2019****Q4. Have you tried to recruit in the past three months?**

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
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	96	65	31	5	22	30	7	7	15	7	3	23	73
	19%	14%	66%	31%	29%	31%	11%	10%	13%	24%	9%	38%	16%
		a			ghj	ghj				gj		l	
No	412	395	16	12	54	67	62	59	104	22	32	37	374
	81%	86%	34%	69%	71%	69%	89%	90%	87%	76%	91%	62%	84%
		b					de	dei	de		dei		k

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

**QES Q4 2019****Q4. Have you tried to recruit in the past three months?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	96	48	48	51	41	5	96	-	68	28	41	48	7
	19%	18%	20%	75%	10%	14%	100%	-	32%	10%	30%	14%	29%
				de			g		i		k		
No	412	221	191	17	366	29	-	412	147	264	95	300	17
	81%	82%	80%	25%	90%	86%	-	100%	68%	90%	70%	86%	71%
				c	c		f		h		j		

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

**QES Q4 2019****Q5. Were the jobs...**

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

	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
Significance Level: 95%	Total	0-9	10+	*c	*d	e	*f	*g	*h	*i	*j	*k	l
Unweighted Total	177	50	127	7	26	57	15	14	25	26	7	29	148
Weighted Total	96	65	31	5	22	30	7	7	15	7	3	23	73
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full-time	73	46	27	4	13	21	7	5	15	6	1	17	57
	76%	71%	86%	77%	59%	71%	93%	81%	100%	92%	31%	71%	77%
		a											
Part-time	35	27	8	1	12	13	1	2	1	2	2	10	25
	36%	42%	25%	23%	56%	45%	10%	27%	6%	33%	69%	43%	34%
		b											
Temporary	15	12	3	-	9	2	*	1	*	2	2	9	7
	16%	19%	10%	-	39%	6%	1%	12%	1%	32%	56%	36%	9%
Permanent	14	10	4	-	5	4	*	2	*	2	-	5	9
	14%	16%	11%	-	24%	12%	2%	33%	1%	33%	-	22%	12%

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

## QES Q4 2019

### Q5. Were the jobs...

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

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	177	92	85	89	75	13	177	-	125	52	74	94	9
Weighted Total	96	48	48	51	41	5	96	-	68	28	41	48	7
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Full-time	73	41	32	39	32	3	73	-	55	18	30	38	6
	76%	85%	67%	75%	79%	56%	76%	-	81%	63%	73%	78%	84%
Part-time		b							i				
	35	9	26	17	16	2	35	-	21	14	16	18	1
	36%	19%	53%	33%	39%	49%	36%	-	30%	50%	38%	37%	17%
Temporary		a							h				
	15	4	12	8	6	1	15	-	9	6	10	5	*
	16%	8%	24%	16%	15%	16%	16%	-	13%	22%	25%	10%	5%
Permanent		a									k		
	14	5	9	4	10	1	14	-	9	5	6	7	1
	14%	11%	18%	7%	24%	15%	14%	-	13%	17%	15%	14%	10%
					c								

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

## QES Q4 2019

### Q6. Did you meet any difficulties in recruiting?

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

		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
Significance Level: 95%		a	b	*c	*d	e	*f	*g	*h	*i	*j	*k	l
Unweighted Total		177	50 127	7	26	57	15	14	25	26	7	29	148
Weighted Total		96	65 31	5	22	30	7	7	15	7	3	23	73
		100%	100% 100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes		57	37 20	2	13	21	2	6	9	3	1	15	42
		59%	57% 63%	41%	60%	70%	30%	86%	57%	44%	21%	63%	57%
No		40	28 12	3	9	9	5	1	7	4	2	9	31
		41%	43% 37%	59%	40%	30%	70%	14%	43%	56%	79%	37%	43%

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



## QES Q4 2019

### Q6. Did you meet any difficulties in recruiting?

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

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	177	92	85	89	75	13	177	-	125	52	74	94	9
Weighted Total	96	48	48	51	41	5	96	-	68	28	41	48	7
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Yes	57	31	26	32	21	3	57	-	43	14	25	28	4
	59%	64%	54%	63%	53%	70%	59%	-	63%	49%	61%	58%	51%
No	40	17	22	19	19	1	40	-	25	14	16	20	3
	41%	36%	46%	37%	47%	30%	41%	-	37%	51%	39%	42%	49%

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

## QES Q4 2019

### Q7. In which category did you have difficulties?

Base: All who had difficulties in recruiting

	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
Significance Level: 95%		*a	b	*c	*d	e	*f	*g	*h	*i	*j	*k	l
Unweighted Total	109	28	81	4	17	38	11	10	14	12	3	20	89
Weighted Total	57	37	20	2	13	21	2	6	9	3	1	15	42
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Skilled manual/ technical	35	26	9	*	10	15	1	2	6	2	-	10	25
	62%	71%	45%	7%	78%	71%	23%	34%	64%	51%	-	67%	60%
Professional/ managerial	26	14	12	2	5	8	2	2	3	2	*	7	19
	45%	38%	59%	100%	41%	40%	76%	41%	37%	70%	53%	48%	44%
Clerical	7	4	3	*	2	*	1	2	-	1	*	2	5
	12%	10%	17%	7%	12%	2%	65%	34%	-	36%	47%	12%	12%
Un/ semi-skilled	7	5	1	-	3	3	*	1	-	*	-	3	3
	12%	15%	6%	-	25%	12%	2%	9%	-	12%	-	22%	8%

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

**QES Q4 2019****Q7. In which category did you have difficulties?**

Base: All who had difficulties in recruiting

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	109	58	51	57	43	9	109	-	81	28	45	58	6
Weighted Total	57	31	26	32	21	3	57	-	43	14	25	28	4
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Skilled manual/ technical	35	16	19	21	12	3	35	-	27	8	18	14	3
	62%	51%	74%	64%	54%	83%	62%	-	62%	60%	72%	50%	79%
			a								k		
Professional/ managerial	26	16	10	13	11	1	26	-	20	5	9	15	2
	45%	52%	38%	42%	53%	35%	45%	-	48%	38%	34%	55%	48%
											j		
Clerical	7	4	3	4	3	*	7	-	5	2	3	4	*
	12%	12%	13%	13%	12%	12%	12%	-	12%	13%	10%	14%	12%
Un/ semi-skilled	7	2	5	3	3	*	7	-	3	4	4	3	-
	12%	6%	19%	9%	15%	14%	12%	-	7%	28%	17%	9%	-
			a										

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

**QES Q4 2019****Q8\_SUM. How have your investment plans changed over the past three months?****SUMMARY TABLE**

Base: All respondents

	Total	Increased	Same	Decreased	Mean
Training	508	73	382	53	*
	100%	14%	75%	10%	
Plant and equipment	508	55	406	47	*
	100%	11%	80%	9%	

**QES Q4 2019****Q8\_1. How have your investment plans changed over the past three months?****Plant and equipment**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
				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	
Total		0-9	10+											
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased	(1)	55	44	11	4	16	12	6	2	8	3	5	15	40
		11%	10%	24%	21%	21%	13%	9%	2%	7%	12%	13%	25%	9%
			a			gh	g				g	g	l	
Same	(0)	406	372	35	13	52	77	51	56	107	23	27	44	363
		80%	81%	73%	79%	68%	80%	74%	84%	90%	80%	77%	72%	81%
			b					d	df					
Decreased	(-1)	47	45	2	-	8	8	12	9	5	2	3	2	45
		9%	10%	3%	-	11%	8%	17%	13%	4%	8%	10%	3%	10%
			b				h	h						
Mean score		*	*	.2	.2	.1	*	-.1	-.1	*	*	*	.2	*
			a			g	g			g	g	l		
Standard deviation		.45	.44	.49	.42	.56	.45	.51	.39	.32	.45	.48	.49	.44
Standard error		.02	.02	.04	.12	.07	.04	.08	.05	.03	.06	.07	.07	.02

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

**QES Q4 2019****Q8\_1. How have your investment plans changed over the past three months?****Plant and equipment**

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: 95%			a	b	c	d	e	f	g	h	i	j	k	*l
Unweighted Total		508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased	(1)	55	24	31	27	28	*	27	28	35	21	24	29	2
		11%	9%	13%	40% de	7%	*	28% g	7%	16% i	7%	17% k	8%	10%
Same	(0)	406	215	192	38	351	17	65	342	172	234	99	299	9
		80%	80%	80%	55% ce	86% ce	53%	67% f	83% f	80% j	80%	72% j	86% j	38%
Decreased	(-1)	47	31	16	3	28	16	4	42	9	38	14	20	12
		9%	11%	7%	5% cd	7% cd	47% cd	5% f	10% f	4% h	13% h	10% h	6% h	52% h
Mean score		*	*	.1 a	.4 de	* e	-.5	.2 g	* i	.1 i	-.1	.1	* j	-.4
Standard deviation		.45	.45	.44	.57	.37	.51	.52	.41	.43	.44	.52	.38	.68
Standard error		.02	.03	.03	.06	.02	.08	.04	.02	.03	.03	.04	.02	.15

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

**QES Q4 2019****Q8\_2. How have your investment plans changed over the past three months?****Training**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
						Motor trades / wholesale / retail / transport & storage / accommodation & food services		Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services			
		Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property		Information & communication				Manufacturing	Services	
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased		(1)	73	54	18	9	17	14	8	17	6	1	23	50
			14%	12%	39%	51%	22%	14%	2%	12%	14%	23%	38%	11%
				a		fj	fj		j	fj	fj		l	
Same		(0)	382	356	26	8	46	72	56	49	98	20	33	348
			75%	77%	54%	49%	61%	75%	81%	74%	82%	69%	93%	78%
				b			d		d		degi		k	
Decreased		(-1)	53	50	3	-	13	11	9	5	2	2	4	50
			10%	11%	7%	-	17%	11%	12%	13%	4%	9%	6%	11%
						hj		h	h					
Mean score		*	*	.3	.5	*	*	-.1	*	.1	.1	*	.3	*
			a			f			f	f			l	
Standard deviation		.50	.48	.61	.52	.63	.51	.41	.51	.42	.55	.26	.59	.47
Standard error		.02	.03	.04	.14	.08	.04	.07	.06	.04	.07	.04	.08	.02

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

## QES Q4 2019

### Q8\_2. How have your investment plans changed over the past three months?

#### Training

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: 95%			a	b	c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased	(1)	73	35	38	35	34	3	36	37	46	27	35	37	-
		14%	13%	16%	52% de	8%	10%	37% g	9%	21% i	9%	26% k	11%	-
Same	(0)	382	200	182	28	340	14	51	331	154	228	84	288	10
		75%	74%	76%	41%	84% ce	42%	53% f	80%	71% j	78%	62% j	83%	42%
Decreased	(-1)	53	35	18	5	32	16	9	44	16	37	16	23	14
		10%	13%	8%	7%	8%	48% cd	9%	11%	7% h	13% h	12% k	7%	58%
Mean score		*	*	.1	.4 de	* e	-.4	.3 g	* i	.1 i	* i	.1 k	* i	-.6
Standard deviation		.50	.51	.48	.63	.40	.66	.63	.44	.52	.47	.60	.41	.50
Standard error		.02	.03	.03	.06	.02	.11	.05	.02	.03	.03	.05	.02	.11

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



**QES Q4 2019****Q9\_SUM. Over the next twelve months what do you think will happen to your...****SUMMARY TABLE**

Base: All respondents

	Total	Increase	Stay the same	Decrease	Mean
Turnover	508	168	223	117	.1
	100%	33%	44%	23%	
Profitability	508	167	229	113	.1
	100%	33%	45%	22%	

**QES Q4 2019****Q9\_1. Over the next twelve months what do you think will happen to your...****Turnover**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
				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	
Total		0-9	10+											
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	(1)	168	149	19	5	24	34	14	26	39	10	14	24	144
		33%	32%	40%	31%	32%	36%	21%	40% f	33%	35%	41% f	39%	32%
Stay the same	(0)	223	203	20	7	37	42	32	25	53	13	14	28	195
		44%	44%	43%	44%	48%	44%	46%	38%	44%	47%	40%	47%	44%
Decrease	(-1)	117	108	8	4	15	20	23	15	28	5	7	8	108
		23%	24%	17%	25%	20%	21%	33%	23%	23%	18%	19%	14%	24%
Mean score		.1	.1	.2	.1	.1	.1	-.1	.2	.1	.2	.2	.3	.1
				a			f				f			
Standard deviation		.74	.74	.73	.77	.71	.74	.73	.78	.74	.72	.75	.69	.75
Standard error		.03	.04	.05	.21	.09	.06	.12	.10	.08	.10	.11	.09	.04

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

**QES Q4 2019****Q9\_1. Over the next twelve months what do you think will happen to your...****Turnover**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	(1) 168	82	86	49	117	2	49	119	68	100	72	94	1
	33%	30%	36%	72% de	29% e	7%	51% g	29%	32%	34%	53% k	27%	5%
Stay the same	(0) 223	116	108	16	204	4	34	190	118	105	30	189	4
	44%	43%	45%	23%	50% ce	12%	35% f	46%	55% i	36%	22% j	54%	15%
Decrease	(-1) 117	72	45	4	86	27	14	103	29	87	33	64	19
	23%	27% b	19%	5%	21% c	81% cd	14% f	25%	14%	30% h	24%	19%	80%
Mean score	.1	*	.2 a	.7 de	.1 e	-.7	.4 g	*	.2 i	*	.3 k	.1	-.7
Standard deviation	.74	.76	.72	.58	.70	.59	.72	.73	.65	.80	.84	.67	.55
Standard error	.03	.05	.05	.06	.04	.09	.05	.04	.04	.05	.07	.04	.12

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

**QES Q4 2019****Q9\_2. Over the next twelve months what do you think will happen to your...****Profitability**

Base: All respondents

		BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
							Motor trades / wholesale / retail / transport & storage / accommodation & food services		Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services		
Total		0-9	10+		Agriculture, forestry & fishing / production	Construction / property		Information & communication					Manufacturing	Services
		a	b		c	d	e	f	g	h	i	j	k	l
Significance Level: 95%														
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	(1)	167	148	19	5	23	34	14	25	39	12	15	24	143
		33%	32%	40%	31%	30%	35%	21%	37%	33%	41% f	44% f	39%	32%
Stay the same	(0)	229	206	22	10	36	42	35	26	55	11	12	31	197
		45%	45%	47%	62%	48%	44%	51%	40%	46%	39%	36%	52%	44%
Decrease	(-1)	113	106	6	1	17	20	20	15	26	6	7	6	107
		22%	23% b	13%	7%	22%	21%	29%	23%	22%	19%	21%	9%	24% k
Mean score		.1	.1	.3 a	.2	.1	.1	-.1	.1	.1	.2	.2	.3 l	.1
Standard deviation		.73	.74	.68	.59	.72	.74	.70	.77	.73	.76	.78	.63	.74
Standard error		.03	.04	.05	.16	.09	.06	.11	.10	.08	.10	.11	.09	.03

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

## QES Q4 2019

**Q9\_2. Over the next twelve months what do you think will happen to your...**

### Profitability

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	(1)	167	78	89	50	115	2	51	116	69	98	68	95	4
		33%	29%	37%	73% de	28% e	6%	53% g	28%	32%	33%	50% k	27%	15%
Stay the same	(0)	229	123	105	14	210	5	32	197	122	107	35	193	1
		45%	46%	44%	20%	52% ce	14%	33% f	48% f	56% i	37%	25% j	55% j	6%
Decrease	(-1)	113	68	45	5	81	27	13	99	25	88	33	60	19
		22%	25%	19%	7%	20% c	80% cd	14% f	24%	12%	30% h	25%	17%	79%
Mean score		.1	*	.2	.7	.1	-.7	.4	*	.2	*	.3	.1	-.6
				a	de	e		g		i		k		
Standard deviation		.73	.74	.73	.61	.69	.56	.72	.72	.63	.80	.83	.66	.75
Standard error		.03	.05	.05	.06	.04	.09	.05	.04	.04	.05	.07	.04	.16

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

**QES Q4 2019****Q10. Are you operating at...**

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full capacity	215	182	33	14	43	49	19	16	50	13	11	40	175
	42%	40%	70%	83%	57%	50%	28%	24%	42%	45%	32%	67%	39%
		a			fgj	fgj			g	g		l	
Below full capacity	293	278	14	3	33	48	50	50	69	16	24	20	272
	58%	60%	30%	17%	43%	50%	72%	76%	58%	55%	68%	33%	61%
		b					de	dehi		de			k

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

**QES Q4 2019****Q10. Are you operating at...**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full capacity	215	110	106	40	168	8	68	147	215	-	60	150	5
	42%	41%	44%	59%	41%	23%	71%	36%	100%	-	44%	43%	20%
				de	e		g		i				
Below full capacity	293	159	133	28	239	26	28	264	-	293	76	198	19
	58%	59%	56%	41%	59%	77%	29%	64%	-	100%	56%	57%	80%
					c	cd		f		h			

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

**QES Q4 2019****Q11. Over the next three months do you expect the price of your goods/ services to:**

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Rise	136	120	16	7	26	39	10	10	31	8	5	26	110
	27%	26%	34%	43%	35% fgj	40% fghj	14%	15%	26%	27%	13%	43% l	25%
Stay the same	348	318	30	10	46	55	50	52	86	20	29	33	315
	69%	69%	63%	57%	60%	56%	73%	79% de	72% e	70%	82% de	54%	70% k
Fall	24	22	1	-	4	4	9	4	2	1	2	2	22
	5%	5%	3%	-	5%	4%	13% ehi	6%	1%	2%	5%	3%	5%

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



**QES Q4 2019****Q11. Over the next three months do you expect the price of your goods/ services to:**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Rise	136	61	75	35	91	10	41	95	60	76	136	-	-
	27%	23%	31%	52%	22%	31%	43%	23%	28%	26%	100%	-	-
		a		de			g				k		
Stay the same	348	192	156	28	305	15	48	300	150	198	-	348	-
	69%	71%	65%	41%	75%	45%	50%	73%	70%	68%	-	100%	-
				ce			f				j		
Fall	24	16	8	5	11	8	7	17	5	19	-	-	24
	5%	6%	3%	7%	3%	24%	7%	4%	2%	6%	-	-	100%
				d		cd				h			

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

**QES Q4 2019****Q12. Is your business under any pressure to raise prices from any of the following?**

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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Finance costs	112	96	16	10	28	25	10	10	19	4	6	23	89
	22%	21%	34%	57%	37%	26%	14%	15%	16%	15%	17%	38%	20%
		a			fghij							l	
Raw material prices	105	88	17	8	25	40	5	5	11	6	5	31	74
	21%	19%	36%	46%	33%	41%	7%	7%	10%	22%	14%	50%	17%
		a			fghj	fghij				fgh		l	
Pay settlements	78	65	14	2	27	15	6	5	18	2	3	16	63
	15%	14%	29%	13%	35%	15%	9%	7%	15%	8%	9%	26%	14%
		a			efghij							l	
Other overheads	174	162	12	3	29	29	28	27	37	9	13	20	154
	34%	35%	25%	18%	38%	30%	41%	40%	31%	32%	39%	33%	34%
		b											
None of the above	165	158	7	4	9	13	34	29	50	10	15	9	156
	33%	34%	15%	22%	12%	14%	50%	43%	42%	35%	44%	15%	35%
		b					de	de	de	de	de		k

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

**QES Q4 2019****Q12. Is your business under any pressure to raise prices from any of the following?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Finance costs	112	54	58	21	77	14	36	76	63	49	43	65	4
	22%	20%	24%	31%	19%	42%	38%	18%	29%	17%	32%	19%	17%
				d		d	g		i		k		
Raw material prices	105	49	56	21	72	11	32	73	54	51	50	51	4
	21%	18%	23%	31%	18%	34%	33%	18%	25%	17%	37%	15%	18%
				d		d	g		i		k		
Pay settlements	78	36	43	19	50	10	30	49	43	35	24	45	10
	15%	13%	18%	28%	12%	29%	31%	12%	20%	12%	17%	13%	41%
				d		d	g		i				
Other overheads	174	102	72	17	145	12	24	151	63	111	66	97	12
	34%	38%	30%	25%	36%	37%	24%	37%	29%	38%	48%	28%	50%
				c			f		h		k		
None of the above	165	92	73	11	149	6	12	153	53	112	14	146	5
	33%	34%	31%	16%	37%	17%	13%	37%	24%	38%	10%	42%	21%
				ce			f		h		j		

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

**QES Q4 2019****Q13\_SUM. Please indicate the extent to which the following have varied in the past 3 months.****SUMMARY TABLE**

Base: All respondents

	Total	Increased significantly	Increased slightly	Stayed the same	Decreased slightly	Decreased significantly	Net: Increased	Net: Decreased	Mean
Cost of fuel	508	34	155	299	18	2	188	20	.4
	100%	7%	30%	59%	4%	*	37%	4%	
Cost of my business's energy	508	37	145	312	12	3	181	15	.4
	100%	7%	28%	61%	2%	1%	36%	3%	
Cost of raw materials (sourced domestically)	508	35	126	337	6	4	161	10	.4
	100%	7%	25%	66%	1%	1%	32%	2%	
Cost of raw materials (sourced internationally)	508	43	106	349	4	5	149	10	.3
	100%	8%	21%	69%	1%	1%	29%	2%	
Pressure from employees to increase wages	508	32	95	373	6	2	127	8	.3
	100%	6%	19%	74%	1%	*	25%	2%	
Cost of borrowing	508	25	68	394	15	5	94	20	.2
	100%	5%	13%	78%	3%	1%	18%	4%	

**QES Q4 2019****Q13\_1. Please indicate the extent to which the following have varied in the past 3 months.****Pressure from employees to increase wages**

Base: All respondents

		BUSINESS SIZE			INDUSTRY								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	
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453	
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447	
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased significantly		(2)	32	25	7	1	6	8	6	4	5	2	1	5	27
			6%	5%	14% a	3%	8%	8%	9%	5%	4%	6%	2%	8%	6%
Increased slightly		(1)	95	79	16	5	19	28	4	13	19	4	3	16	79
			19%	17%	35% a	30%	25% fj	29% fhij	6%	20%	16%	15%	7%	27%	18%
Stayed the same		(0)	373	351	22	11	51	55	59	49	95	22	31	40	334
			74%	76% b	47%	66%	67%	57%	85% de	75% e	79% e	77% e	88% de	65%	75%
Decreased slightly		(-1)	6	4	2	-	-	5	-	*	1	*	1	-	6
			1%	1%	4% a	-	-	5%	-	*	*	*	2%	-	1%
Decreased significantly		(-2)	2	2	-	-	-	1	-	-	-	1	-	-	2
			*	*	-	-	-	1%	-	-	-	2%	-	-	*
NETS															
Net: Increased		127	104	23	6	25	36	10	16	24	6	3	21	106	
		25%	23%	49% a	34%	33% fj	37% fhij	15%	25% j	20%	20%	10%	35%	24%	
Net: Decreased		8	6	2	-	-	6	-	*	1	1	1	-	8	
		2%	1%	4% a	-	-	6% h	-	*	*	2%	2%	-	2%	
Mean score		.3	.3	.6 a	.4	.4 j	.4 j	.2	.3 j	.2	.2	.1	.4	.3	
Standard deviation		.61	.59	.79	.57	.63	.75	.60	.57	.53	.66	.43	.64	.61	
Standard error		.03	.03	.06	.16	.08	.07	.10	.07	.06	.09	.06	.09	.03	

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

**QES Q4 2019****Q13\_1. Please indicate the extent to which the following have varied in the past 3 months.****Pressure from employees to increase wages**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	32	17	15	16	11	6	19	13	17	15	13	16	4
		6%	6%	6%	23% d	3%	17% d	20% g	3%	8%	5%	9% k	5%	16%
Increased slightly	(1)	95	48	47	25	62	8	33	62	48	47	32	50	12
		19%	18%	20%	36% d	15%	24% g	34% g	15%	22%	16%	24% k	14%	52%
Stayed the same	(0)	373	201	172	27	328	18	40	333	146	227	90	278	6
		74%	75%	72%	40%	81% ce	56%	41% f	81% f	68%	78% h	66%	80% j	24%
Decreased slightly	(-1)	6	3	3	*	4	1	4	2	4	2	2	3	1
		1%	1%	1%	1%	1%	3% g	4% g	* *	2%	1%	1%	1%	6%
Decreased significantly	(-2)	2	-	2	-	2	-	-	2	1	1	-	1	1
		*	-	1%	-	*	-	-	*	*	*	-	*	3%
NETS														
Net: Increased		127	65	62	41	73	14	52	75	65	62	45	66	16
		25%	24%	26%	60% de	18%	41% d	54% g	18%	30% i	21%	33% k	19%	67%
Net: Decreased		8	3	5	*	6	1	4	3	5	3	2	4	2
		2%	1%	2%	1%	2%	3% g	4% g	1%	2%	1%	1%	1%	9%
Mean score		.3	.3	.3	.8 d	.2	.5 d	.7 g	.2	.4	.3	.4 k	.2	.7
Standard deviation		.61	.60	.64	.79	.50	.82	.84	.50	.67	.57	.68	.55	.91
Standard error		.03	.04	.04	.08	.03	.13	.06	.03	.04	.04	.05	.03	.19

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

**QES Q4 2019****Q13\_2. Please indicate the extent to which the following have varied in the past 3 months.****Cost of borrowing**

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
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	25	20	5	1	6	8	*	4	5	1	1	5	20
		5%	4%	11%	5%	7%	8%	*	5%	4%	4%	2%	8%	5%
				a										
Increased slightly	(1)	68	56	12	3	11	21	9	9	10	3	3	10	59
		13%	12%	25%	18%	14%	22%	13%	13%	9%	10%	10%	16%	13%
				a			h							
Stayed the same	(0)	394	365	29	13	55	62	60	51	100	25	28	46	348
		78%	79%	61%	77%	72%	64%	87%	78%	84%	86%	81%	76%	78%
				b				e		e	e	e		
Decreased slightly	(-1)	15	14	1	-	4	5	*	2	2	*	2	-	15
		3%	3%	2%	-	5%	5%	*	4%	2%	*	5%	-	3%
Decreased significantly	(-2)	5	5	*	-	2	1	-	-	2	*	1	-	5
		1%	1%	*	-	2%	1%	-	-	2%	*	3%	-	1%
NETS														
Net: Increased		94	76	17	4	16	29	9	12	15	4	4	15	79
		18%	17%	37%	23%	21%	30%	13%	18%	13%	14%	12%	24%	18%
				a			fhij							
Net: Decreased		20	19	1	-	5	6	*	2	4	*	2	-	20
		4%	4%	3%	-	7%	6%	*	4%	3%	*	7%	-	5%
Mean score		.2	.2	.4	.3	.2	.3	.1	.2	.1	.2	.1	.3	.2
				a			j							
Standard deviation		.61	.59	.74	.58	.73	.74	.36	.59	.57	.50	.59	.62	.61
Standard error		.03	.03	.05	.16	.09	.06	.06	.07	.06	.07	.08	.08	.03

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

## QES Q4 2019

**Q13\_2. Please indicate the extent to which the following have varied in the past 3 months.**

### Cost of borrowing

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: 95%			a	b	c	d	e	f	g	h	i	j	k	*l
Unweighted Total		508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	25	16	9	17	6	3	21	5	19	6	16	10	*
		5%	6%	4%	25% de	1%	9% d	21% g	1%	9% i	2%	12% k	3%	*
Increased slightly	(1)	68	33	35	16	42	10	23	45	29	40	29	31	8
		13%	12%	15%	24% d	10% d	29% d	24% g	11%	13%	14%	22% k	9%	34%
Stayed the same	(0)	394	212	182	29	346	19	44	350	156	238	88	293	13
		78%	79%	76%	42% ce	85% ce	59%	46% f	85% f	72% h	81% h	65% j	84% j	53%
Decreased slightly	(-1)	15	7	8	4	9	1	7	8	7	8	3	11	1
		3%	2%	3%	6% d	2% d	3% d	7% g	2% g	3% g	3% g	2% g	3% g	6% g
Decreased significantly	(-2)	5	1	4	2	4	-	2	4	4	1	-	4	2
		1%	*	2%	3% d	1% d	- d	2% g	1% g	2% g	* g	- g	1% g	7% g
NETS														
Net: Increased		94	50	44	33	48	13	44	50	48	46	45	41	8
		18%	18%	18%	49% d	12% d	38% d	45% g	12% g	22% g	16% g	33% k	12% k	34% k
Net: Decreased		20	7	13	6	13	1	9	12	12	8	3	14	3
		4%	3%	5%	9% d	3% d	3% d	9% g	3% g	5% g	3% g	2% g	4% g	13% g
Mean score		.2	.2	.2	.6 d	.1	.4 d	.6 g	.1	.2	.1	.4 k	.1	.1
Standard deviation		.61	.60	.62	1.02	.46	.71	.97	.45	.74	.49	.72	.51	.84
Standard error		.03	.04	.04	.10	.02	.11	.07	.02	.05	.03	.06	.03	.18

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



**QES Q4 2019****Q13\_3. Please indicate the extent to which the following have varied in the past 3 months.****Cost of my business's energy**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								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
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	37	32	5	-	9	10	4	5	4	2	2	8	29
		7%	7%	10%	-	12% h	10%	6%	8%	3%	8%	6%	12%	6%
Increased slightly	(1)	145	126	19	5	21	34	16	19	32	9	9	15	130
		28%	27%	39% a	28%	28%	35%	23%	28%	27%	32%	27%	25%	29%
Stayed the same	(0)	312	289	23	12	44	49	49	37	84	15	21	38	273
		61%	63% b	48%	72%	58%	51%	71% e	56%	70% ei	53%	62%	63%	61%
Decreased slightly	(-1)	12	11	1	-	2	2	-	5	-	2	1	-	12
		2%	2%	2%	-	2%	2%	-	8% eh	-	7% h	3%	-	3%
Decreased significantly	(-2)	3	3	*	-	-	3	-	-	-	-	1	-	3
		1%	1%	1%	-	-	3%	-	-	-	-	3%	-	1%
NETS														
Net: Increased		181	158	24	5	30	43	20	24	36	11	12	23	159
		36%	34%	50% a	28%	40%	44% h	29%	36%	30%	40%	33%	37%	35%
Net: Decreased		15	14	1	-	2	4	-	5	-	2	2	-	15
		3%	3%	2%	-	2%	5% h	-	8% h	-	7% h	5% h	-	3%
Mean score		.4	.4	.6 a	.3	.5	.5	.3	.4	.3	.4	.3	.5	.4
Standard deviation		.69	.68	.74	.46	.74	.81	.59	.75	.54	.75	.75	.71	.68
Standard error		.03	.04	.05	.13	.09	.07	.09	.09	.06	.10	.11	.10	.03

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

**QES Q4 2019****Q13\_3. Please indicate the extent to which the following have varied in the past 3 months.****Cost of my business's energy**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	37	13	23	14	17	5	19	17	25	12	15	19	3
		7%	5%	10%	21%	4%	16%	20%	4%	12%	4%	11%	5%	14%
				a	d		d	g		i		k		
Increased slightly	(1)	145	82	63	21	116	8	30	115	59	85	54	85	6
		28%	30%	26%	32%	28%	23%	31%	28%	28%	29%	40%	24%	23%
												k		
Stayed the same	(0)	312	166	145	27	264	20	44	268	127	184	62	235	14
		61%	62%	61%	40%	65%	61%	45%	65%	59%	63%	46%	68%	60%
						c	c	f					j	
Decreased slightly	(-1)	12	5	6	3	8	*	2	10	1	10	4	7	1
		2%	2%	3%	5%	2%	*	2%	2%	1%	4%	3%	2%	3%
											h			
Decreased significantly	(-2)	3	2	1	2	2	-	2	2	3	1	2	2	-
		1%	1%	*	2%	*	-	2%	*	1%	*	1%	1%	-
NETS														
Net: Increased		181	95	86	36	132	13	49	132	84	97	69	104	9
		36%	35%	36%	53%	33%	39%	51%	32%	39%	33%	51%	30%	37%
					d			g				k		
Net: Decreased		15	8	7	5	10	*	4	11	4	11	5	9	1
		3%	3%	3%	7%	3%	*	4%	3%	2%	4%	4%	3%	3%
					d									
Mean score		.4	.4	.4	.6	.3	.6	.7	.3	.5	.3	.6	.3	.5
					d		d	g		i		k		
Standard deviation		.69	.65	.72	.95	.61	.77	.88	.62	.75	.63	.77	.63	.78
Standard error		.03	.04	.05	.09	.03	.12	.07	.03	.05	.04	.06	.03	.17

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

**QES Q4 2019****Q13\_4. Please indicate the extent to which the following have varied in the past 3 months.****Cost of fuel**

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
Significance Level: 95%		a	b		*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	34	28	5	-	10	8	6	5	2	2	2	8	26
		7%	6%	11%	-	13%	8%	9%	7%	2%	6%	4%	13%	6%
			a			h							l	
Increased slightly	(1)	155	140	14	6	28	38	12	19	33	6	12	27	128
		30%	31%	30%	36%	37%	39%	18%	29%	27%	22%	33%	44%	29%
						f	fi						l	
Stayed the same	(0)	299	273	26	11	32	47	48	41	83	19	19	22	277
		59%	59%	55%	64%	42%	48%	69%	62%	69%	66%	55%	37%	62%
								de	d	de	de		k	k
Decreased slightly	(-1)	18	17	1	-	6	4	3	1	2	2	1	4	14
		4%	4%	2%	-	7%	4%	4%	2%	2%	5%	2%	6%	3%
Decreased significantly	(-2)	2	2	1	-	-	1	-	-	-	*	2	-	2
		*	*	1%	-	-	1%	-	-	-	*	5%	-	1%
											h			
NETS														
Net: Increased		188	169	20	6	39	45	19	24	35	8	13	35	154
		37%	37%	41%	36%	51%	47%	27%	36%	29%	28%	37%	57%	34%
						fhi	fhi						l	
Net: Decreased		20	18	2	-	6	5	3	1	2	2	2	4	17
		4%	4%	4%	-	7%	5%	4%	2%	2%	6%	7%	6%	4%
Mean score		.4	.4	.5	.4	.6	.5	.3	.4	.3	.3	.3	.6	.4
						hi	h						l	
Standard deviation		.69	.68	.79	.49	.82	.73	.70	.65	.53	.67	.81	.79	.67
Standard error		.03	.04	.06	.14	.10	.06	.11	.08	.06	.09	.12	.11	.03

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

**QES Q4 2019****Q13\_4. Please indicate the extent to which the following have varied in the past 3 months.****Cost of fuel**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	34	17	17	16	12	6	18	15	17	16	14	15	5
		7%	6%	7%	23% d	3%	17% d	19% g	4%	8%	6%	10% k	4%	20%
Increased slightly	(1)	155	72	82	18	125	11	28	127	65	89	54	95	5
		30%	27%	34%	26%	31%	34%	29%	31%	30%	31%	40% k	27%	23%
Stayed the same	(0)	299	168	131	31	254	14	44	255	123	176	62	231	6
		59%	62%	55%	45%	63% ce	43%	46%	62% f	57%	60%	46%	66% j	26%
Decreased slightly	(-1)	18	10	8	3	13	2	5	13	8	10	4	6	7
		4%	4%	3%	5%	3%	6%	5%	3%	4%	3%	3%	2%	31%
Decreased significantly	(-2)	2	2	*	*	2	-	1	2	2	1	1	2	-
		*	1%	*	1%	1%	-	1%	*	1%	*	*	1%	-
NETS														
Net: Increased		188	89	99	34	137	17	46	142	82	106	69	109	10
		37%	33%	42%	50% d	34%	51% d	48% g	35%	38%	36%	50% k	31%	43%
Net: Decreased		20	12	8	4	15	2	6	14	10	11	5	8	7
		4%	5%	3%	5%	4%	6%	6%	4%	4%	4%	4%	2%	31%
Mean score		.4	.3	.5	.7 d	.3	.6 d	.6 g	.3	.4	.4	.6 k	.3	.3
Standard deviation		.69	.69	.68	.91	.61	.85	.88	.62	.72	.66	.74	.61	1.14
Standard error		.03	.04	.04	.09	.03	.13	.07	.03	.05	.04	.06	.03	.24

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

**QES Q4 2019****Q13\_5. Please indicate the extent to which the following have varied in the past 3 months.****Cost of raw materials (sourced domestically)**

Base: All respondents

		BUSINESS SIZE			INDUSTRY								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
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	35	27	8	4	11	9	2	3	4	2	1	13	22
		7%	6%	17% a	23%	14% hj	10%	2%	4%	3%	7%	2%	21% l	5%
Increased slightly	(1)	126	110	16	7	18	37	14	9	24	6	10	18	108
		25%	24%	33% a	43%	24%	38% fghi	21%	13%	20%	22%	29% g	30%	24%
Stayed the same	(0)	337	315	23	6	45	46	53	55	91	19	23	27	310
		66%	68% b	48%	34%	59%	47%	77% e	83% deij	76% de	67% e	66% e	45%	69% k
Decreased slightly	(-1)	6	5	1	-	1	3	-	-	-	1	1	1	5
		1%	1%	1%	-	1%	3%	-	-	-	3%	3%	1%	1%
Decreased significantly	(-2)	4	4	1	-	2	2	*	-	-	*	-	2	2
		1%	1%	1%	-	2%	2%	*	-	-	1%	-	3%	1%
NETS														
Net: Increased		161	137	24	11	29	46	16	11	28	8	11	31	130
		32%	30%	50% a	66%	38% g	47% fghi	23%	17%	24%	29%	31%	51% l	29%
Net: Decreased		10	8	1	-	2	5	*	-	-	1	1	2	7
		2%	2%	2%	-	3%	6% h	*	-	-	4%	3%	4%	2%
Mean score		.4	.3	.6 a	.9	.5 g	.5 gh	.3	.2	.3	.3	.3	.7 l	.3
Standard deviation		.66	.64	.82	.77	.82	.81	.49	.50	.52	.69	.57	.92	.61
Standard error		.03	.04	.06	.21	.10	.07	.08	.06	.05	.09	.08	.12	.03

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

## QES Q4 2019

**Q13\_5. Please indicate the extent to which the following have varied in the past 3 months.**

**Cost of raw materials (sourced domestically)**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	35	21	14	19	11	5	19	16	23	11	18	13	4
		7%	8%	6%	27%	3%	16%	20%	4%	11%	4%	13%	4%	18%
					d		d	g		i		k		
Increased slightly	(1)	126	60	66	23	94	9	33	93	56	70	57	64	5
		25%	22%	28%	34%	23%	26%	34%	23%	26%	24%	42%	18%	20%
					d			g				k		
Stayed the same	(0)	337	185	153	26	294	17	42	296	130	208	58	267	13
		66%	69%	64%	38%	72%	52%	43%	72%	60%	71%	42%	77%	55%
					ce			f		h		j		
Decreased slightly	(-1)	6	3	2	*	5	*	2	3	4	1	3	2	*
		1%	1%	1%	*	1%	1%	2%	1%	2%	*	2%	1%	*
Decreased significantly	(-2)	4	*	4	*	2	2	1	4	2	2	*	2	2
		1%	*	2%	*	1%	5%	1%	1%	1%	1%	*	1%	7%
						d								
NETS														
Net: Increased		161	81	80	42	105	14	52	109	79	82	75	77	9
		32%	30%	34%	61%	26%	42%	54%	27%	37%	28%	55%	22%	38%
					de		d	g		i		k		
Net: Decreased		10	4	6	*	7	2	3	7	7	3	4	4	2
		2%	1%	3%	1%	2%	6%	3%	2%	3%	1%	3%	1%	7%
						c								
Mean score		.4	.4	.4	.9	.3	.5	.7	.3	.4	.3	.7	.2	.4
					de		d	g		i		k		
Standard deviation		.66	.65	.68	.83	.55	.96	.83	.59	.76	.58	.74	.55	1.03
Standard error		.03	.04	.04	.08	.03	.15	.06	.03	.05	.04	.06	.03	.22

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

**QES Q4 2019****Q13\_6. Please indicate the extent to which the following have varied in the past 3 months.****Cost of raw materials (sourced internationally)**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								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
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	43	35	8	3	10	14	2	4	6	1	2	10	33
		8%	8%	17% a	18%	14%	15% fhi	2%	7%	5%	3%	5%	17% l	7%
Increased slightly	(1)	106	91	15	4	17	31	12	6	24	6	6	15	91
		21%	20%	33% a	23%	22%	32% g	17%	10%	20%	20%	18%	25%	20%
Stayed the same	(0)	349	326	23	10	45	49	56	54	89	22	25	32	317
		69%	71% b	49%	60%	59%	50%	80% de	82% de	74% de	76% e	72% e	52%	71% k
Decreased slightly	(-1)	4	4	1	-	-	1	*	1	-	*	2	-	4
		1%	1%	1%	-	-	1%	*	2%	-	1%	5% h	-	1%
Decreased significantly	(-2)	5	5	*	-	3	2	-	-	-	-	-	3	2
		1%	1%	*	-	4% h	2%	-	-	-	-	-	5% l	*
NETS														
Net: Increased		149	126	23	7	27	45	14	11	31	7	8	26	123
		29%	27%	49% a	40%	36% g	46% fghij	20%	17%	26%	23%	23%	42% l	28%
Net: Decreased		10	9	1	-	3	3	*	1	-	*	2	3	6
		2%	2%	2%	-	4% h	3%	*	2%	-	1%	5% h	5% l	1%
Mean score		.3	.3	.6 a	.6	.4	.6 fghij	.2	.2	.3	.3	.2	.5	.3
Standard deviation		.69	.67	.79	.80	.89	.83	.47	.59	.57	.54	.62	.96	.64
Standard error		.03	.04	.06	.22	.11	.07	.08	.07	.06	.07	.09	.13	.03

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

**QES Q4 2019****Q13\_6. Please indicate the extent to which the following have varied in the past 3 months.****Cost of raw materials (sourced internationally)**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	43	25	18	17	17	8	23	20	24	19	24	16	3
		8%	9%	7%	25% d	4%	25% d	23% g	5%	11%	6%	18% k	5%	12%
Increased slightly	(1)	106	56	50	20	78	8	33	73	49	57	40	61	5
		21%	21%	21%	30% d	19%	23%	34% g	18%	23%	20%	29% k	18%	23%
Stayed the same	(0)	349	185	164	29	305	15	39	311	137	212	70	265	14
		69%	69%	69%	42%	75% ce	46%	40%	75% f	64%	73% h	52%	76% j	58%
Decreased slightly	(-1)	4	2	2	*	4	*	1	4	3	1	*	4	*
		1%	1%	1%	*	1%	*	1%	1%	2%	*	*	1%	*
Decreased significantly	(-2)	5	*	5	2	2	2	2	4	2	3	2	2	2
		1%	*	2% a	3%	*	5% d	2%	1%	1%	1%	1%	1%	7%
NETS														
Net: Increased		149	82	68	37	96	16	55	94	73	76	64	77	8
		29%	30%	28%	55% d	24%	49% d	58% g	23%	34% i	26%	47% k	22%	35%
Net: Decreased		10	2	7	2	6	2	2	7	5	4	2	6	2
		2%	1%	3%	3%	2%	5%	2%	2%	2%	2%	1%	2%	7%
Mean score		.3	.4	.3	.7 d	.3	.6 d	.8 g	.2	.4	.3	.6 k	.2	.3
Standard deviation		.69	.67	.72	.93	.57	1.03	.88	.60	.75	.64	.82	.58	.96
Standard error		.03	.04	.04	.09	.03	.16	.07	.03	.05	.04	.07	.03	.20

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



**QES Q4 2019****Q14. Which of the following are more of a concern to your business than they were three months ago?**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Competition	184	169	15	1	28	43	25	24	39	9	16	20	164
	36%	37%	31%	4%	36%	44%	36%	36%	33%	30%	46%	33%	37%
Exchange rates	153	135	18	11	16	30	22	20	38	6	8	20	133
	30%	29%	38%	65%	21%	31%	32%	31%	32%	22%	24%	33%	30%
Inflation	143	131	11	1	26	27	29	18	24	10	7	18	125
	28%	28%	24%	8%	34%	28%	42%	28%	20%	34%	20%	29%	28%
Business rates	109	92	17	5	25	24	16	14	18	3	4	20	89
	21%	20%	36%	27%	32%	25%	24%	22%	15%	11%	12%	32%	20%
			a		hij	i						l	
Corporate Taxation	96	83	13	1	18	17	19	13	21	3	4	13	83
	19%	18%	27%	8%	23%	17%	27%	20%	18%	11%	10%	21%	19%
			a				ij						
Interest rates	96	86	10	7	18	19	12	13	22	3	3	19	77
	19%	19%	20%	44%	23%	19%	17%	19%	18%	11%	8%	31%	17%
					j							l	
None of the above	64	61	3	-	5	7	11	8	21	5	8	3	61
	13%	13%	7%	-	7%	7%	16%	12%	18%	16%	24%	5%	14%
		b						e		de			

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

**QES Q4 2019****Q14. Which of the following are more of a concern to your business than they were three months ago?**

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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Competition	184	93	91	15	155	14	31	153	63	121	57	117	10
	36%	35%	38%	22%	38%	43%	33%	37%	29%	42%	42%	34%	42%
					c	c				h			
Exchange rates	153	99	54	26	117	9	41	112	64	89	53	95	5
	30%	37%	23%	39%	29%	28%	42%	27%	29%	31%	39%	27%	23%
		b					g				k		
Inflation	143	78	64	22	114	7	31	111	68	74	47	83	13
	28%	29%	27%	32%	28%	21%	32%	27%	32%	25%	34%	24%	54%
											k		
Business rates	109	59	50	21	77	11	34	76	44	65	35	61	14
	21%	22%	21%	30%	19%	35%	35%	18%	20%	22%	25%	17%	58%
				d		d	g				k		
Corporate Taxation	96	58	38	15	70	10	28	68	40	56	31	51	13
	19%	22%	16%	22%	17%	31%	29%	17%	19%	19%	23%	15%	57%
						d	g				k		
Interest rates	96	47	49	19	68	9	29	66	44	52	32	57	6
	19%	18%	20%	28%	17%	26%	30%	16%	21%	18%	24%	16%	27%
				d			g						
None of the above	64	24	40	4	59	1	4	60	22	42	8	55	*
	13%	9%	17%	5%	15%	4%	4%	15%	10%	14%	6%	16%	1%
		a			c		f				j		

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

**QES Q4 2019****Q15\_SUM. What do you expect to happen to the following economic indicators over the next twelve months?****SUMMARY TABLE**

Base: All respondents

	Total	Improve	Stay the same	Worsen	Mean
Economic prospects for your company	508	120	244	144	*
	100%	24%	48%	28%	
Economic prospects for London	508	106	190	212	-.2
	100%	21%	37%	42%	
UK economic growth	508	106	161	242	-.3
	100%	21%	32%	48%	

**QES Q4 2019****Q15\_1. What do you expect to happen to the following economic indicators over the next twelve months?****UK economic growth**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
						Motor trades / wholesale / retail / transport & storage / accommodation & food services		Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services			
		Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property		Information & communication				Manufacturing	Services	
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1)	106	91	14	5	26	20	10	13	24	4	4	22	84
		21%	20%	30%	27%	35%	20%	14%	20%	20%	14%	13%	36%	19%
				a		efhij							l	
Stay the same	(0)	161	145	15	7	21	40	20	20	36	6	11	18	143
		32%	32%	32%	44%	28%	41%	28%	30%	30%	22%	31%	29%	32%
						i								
Worsen	(-1)	242	224	18	5	28	38	40	33	60	18	20	21	220
		48%	49%	38%	29%	37%	39%	58%	50%	50%	64%	56%	35%	49%
			b				de			de	de		k	
Mean score		-.3	-.3	-.1	*	*	-.2	-.4	-.3	-.3	-.5	-.4	*	-.3
				a		fhij	ij						l	
Standard deviation		.78	.78	.83	.77	.85	.75	.73	.79	.78	.74	.72	.85	.77
Standard error		.03	.04	.06	.21	.11	.07	.12	.10	.08	.10	.10	.11	.04

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

**QES Q4 2019****Q15\_1. What do you expect to happen to the following economic indicators over the next twelve months?****UK economic growth**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1)	106	53	52	23	82	-	28	77	58	47	38	68	-
		21%	20%	22%	34% de	20% e	-	29% g	19%	27% i	16%	28% k	19%	-
Stay the same	(0)	161	73	88	24	131	5	35	126	91	70	39	118	4
		32%	27% a	37% a	36% e	32% e	14%	36%	31%	42% i	24%	29%	34%	15%
Worsen	(-1)	242	143	99	20	193	28	34	208	66	175	59	162	20
		48%	53% b	41%	30%	47% c	86% cd	35% f	51%	31% h	60%	44%	47%	85%
Mean score		-.3	-.3	-.2	* de	-.3 e	-.9	-.1 g	-.3	* i	-.4	-.2	-.3	-.8
Standard deviation		.78	.79	.77	.81	.78	.36	.80	.77	.76	.76	.83	.77	.37
Standard error		.03	.05	.05	.08	.04	.06	.06	.04	.05	.05	.07	.04	.08

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

**QES Q4 2019****Q15\_5. What do you expect to happen to the following economic indicators over the next twelve months?****Economic prospects for London**

Base: All respondents

		BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
						Motor trades / wholesale / retail / transport & storage / accommodation & food services		Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services			
Total		0-9	10+	Agriculture, forestry & fishing / production	Construction / property		Information & communication					Manufacturing	Services	
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1)	106	94	12	4	25	16	13	12	21	7	8	21	86
		21%	20%	25%	23%	33%	16%	18%	18%	18%	26%	22%	34%	19%
					egh								l	
Stay the same	(0)	190	166	24	11	28	48	19	26	42	7	9	26	164
		37%	36%	50%	64%	37%	49%	28%	39%	35%	23%	27%	42%	37%
				a			fhij							
Worsen	(-1)	212	200	12	2	22	33	37	28	56	15	18	15	197
		42%	43%	25%	13%	29%	34%	54%	43%	47%	51%	51%	24%	44%
			b				de		d	de	de		k	
Mean score		-.2	-.2	*	.1	*	-.2	-.4	-.3	-.3	-.3	-.3	.1	-.2
				a		efghj							l	
Standard deviation		.76	.77	.72	.61	.80	.69	.78	.75	.75	.86	.82	.76	.76
Standard error		.03	.04	.05	.17	.10	.06	.12	.09	.08	.11	.12	.10	.04

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

## QES Q4 2019

**Q15\_5. What do you expect to happen to the following economic indicators over the next twelve months?**

### Economic prospects for London

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1)	106	56	51	23	83	-	30	76	57	49	41	65	1
		21%	21%	21%	34% de	20% e	-	31% g	19%	27% i	17%	30% k	19%	3%
Stay the same	(0)	190	87	103	26	154	10	34	156	95	94	43	144	2
		37%	32% a	43% a	39%	38%	29%	35%	38%	44% i	32%	32%	41% j	10%
Worsen	(-1)	212	127	85	19	170	24	32	179	63	149	52	139	21
		42%	47% b	36%	27%	42% c	71% cd	34%	44% f	29%	51% h	39%	40%	87%
Mean score		-.2	-.3	-.1	.1 de	-.2 e	-.7	* g	-.3	* i	-.3	-.1	-.2	-.8
Standard deviation		.76	.78	.74	.79	.76	.46	.81	.75	.75	.75	.83	.74	.45
Standard error		.03	.05	.05	.08	.04	.07	.06	.04	.05	.05	.07	.04	.10

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

**QES Q4 2019****Q15\_6. What do you expect to happen to the following economic indicators over the next twelve months?****Economic prospects for your company**

Base: All respondents

		BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES		
					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	
Total		0-9	10+												
Significance Level: 95%		a	b		c	d	e	f	g	h	i	j	k	l	
Unweighted Total		508	326	182	13	65	130	40	65	90	57	48	55	453	
Weighted Total		508	460	48	17	76	97	69	66	119	29	35	61	447	
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve		(1)	120	107	13	3	24	21	9	16	26	9	11	20	100
			24%	23%	28%	17%	32%	22%	12%	25%	22%	33%	33%	32%	22%
						f					f	f			
Stay the same		(0)	244	219	25	13	37	49	35	31	52	13	16	34	210
			48%	48%	53%	76%	49%	50%	50%	46%	43%	45%	44%	56%	47%
Worsen		(-1)	144	134	9	1	15	27	26	19	42	6	8	7	137
			28%	29%	20%	7%	19%	28%	37%	29%	35%	22%	23%	11%	31%
				b				d		d				k	
Mean score		*	-.1	.1	.1	.1	-.1	-.2	*	-.1	.1	.1	.2	-.1	
				a		fh				f	f	f	l		
Standard deviation		.72	.72	.69	.49	.71	.71	.66	.74	.75	.75	.75	.63	.72	
Standard error		.03	.04	.05	.14	.09	.06	.11	.09	.08	.10	.11	.09	.03	

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



**QES Q4 2019****Q15\_6. What do you expect to happen to the following economic indicators over the next twelve months?****Economic prospects for your company**

Base: All respondents

		LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total		508	269	239	68	407	33	96	412	215	293	136	348	24
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1)	120	60	60	33	87	*	34	86	59	61	44	75	2
		24%	22%	25%	48% de	21% e	1%	35% g	21%	27%	21%	32% k	21%	7%
Stay the same	(0)	244	123	121	27	211	7	46	198	113	131	59	183	2
		48%	46%	51%	39% e	52% ce	21%	48%	48%	53%	45%	44%	53%	7%
Worsen	(-1)	144	86	58	9	109	26	16	127	43	100	33	90	20
		28%	32% b	24%	13%	27% c	79% cd	17%	31% f	20%	34% h	24%	26%	86%
Mean score		*	-.1	*	.3 de	-.1 e	-.8	.2 g	-.1	.1 i	-.1	.1	*	-.8
Standard deviation		.72	.73	.70	.70	.69	.43	.70	.71	.69	.73	.75	.69	.57
Standard error		.03	.05	.04	.07	.04	.07	.05	.04	.04	.05	.06	.04	.12

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

# QES Q4 2019

## Q16. Over the last three months, which of the following methods, if any, have you used to acquire new skills for your 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
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Training existing staff	122	102	20	8	25	25	15	13	24	8	4	23	99
	24%	22%	42%	46%	33%	26%	22%	20%	20%	27%	11%	38%	22%
			a		j	j				j		l	
Employing new staff from the UK workforce	69	51	18	7	14	15	6	6	14	4	3	19	50
	14%	11%	39%	39%	19%	16%	8%	9%	12%	14%	10%	32%	11%
			a									l	
Employing new staff from the EU/EEA workforce, excluding the UK (e.g. Germany, Norway)	38	28	10	1	12	9	7	2	5	1	1	12	27
	8%	6%	22%	8%	16%	9%	10%	4%	4%	2%	3%	19%	6%
			a		ghij							l	
Employing apprentice(s)	29	22	7	1	10	7	1	2	5	2	1	11	18
	6%	5%	14%	4%	14%	8%	1%	3%	4%	6%	3%	18%	4%
			a		fgh							l	
Employing work experience students or interns	25	18	7	3	6	7	*	3	4	2	-	8	17
	5%	4%	14%	15%	7%	7%	*	5%	3%	7%	-	13%	4%
			a									l	
Employing new staff from outside the UK / EU / EEA (e.g. America, China)	23	15	8	2	8	6	2	*	5	1	*	9	13
	5%	3%	16%	12%	10%	6%	2%	*	4%	3%	1%	16%	3%
			a		g							l	
None of the above	312	304	8	3	37	52	45	47	84	17	27	18	293
	61%	66%	17%	18%	49%	54%	65%	71%	70%	59%	77%	30%	66%
		b						de	de		de		k

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

# QES Q4 2019

**Q16. Over the last three months, which of the following methods, if any, have you used to acquire new skills for your business?**

Base: All respondents

	LOCATION			EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Training existing staff	122	62	60	26	90	6	44	78	59	63	40	76	5
	24%	23%	25%	38%	22%	19%	46%	19%	27%	21%	30%	22%	22%
				de			g						
Employing new staff from the UK workforce	69	35	34	32	33	4	52	17	45	24	30	33	6
	14%	13%	14%	47%	8%	12%	54%	4%	21%	8%	22%	10%	25%
				de			g		i		k		
Employing new staff from the EU/EEA workforce, excluding the UK (e.g. Germany, Norway)	38	22	17	18	18	2	26	12	25	14	15	18	5
	8%	8%	7%	26%	4%	7%	27%	3%	11%	5%	11%	5%	22%
				de			g		i		k		
Employing apprentice(s)	29	12	17	7	17	4	18	11	21	8	13	14	2
	6%	4%	7%	11%	4%	13%	19%	3%	10%	3%	9%	4%	9%
				d		d	g		i		k		
Employing work experience students or interns	25	13	12	7	17	1	15	10	14	11	10	14	1
	5%	5%	5%	10%	4%	3%	15%	3%	7%	4%	8%	4%	5%
				d			g						
Employing new staff from outside the UK / EU / EEA (e.g. America, China)	23	13	10	8	14	1	16	7	16	7	9	13	1
	5%	5%	4%	11%	3%	4%	16%	2%	7%	2%	7%	4%	4%
				d			g		i				
None of the above	312	166	145	10	280	21	3	309	107	204	72	230	10
	61%	62%	61%	15%	69%	65%	3%	75%	50%	70%	53%	66%	43%
					c	c		f		h		j	

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