



## LCCI – QES Q4 2018

Methodology: ComRes interviewed 507 London business decision makers online between the 26<sup>th</sup> October and 21<sup>st</sup> November 2018. Data were weighted to be representative of all London businesses by company size and broad industry sector. ComRes is a member of the British Polling Council and abides by its rules.

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## QES Q4 2018

Total employed. .... Base: All respondents	1
S1. Which of the following responsibilities do you hold in your organisation? ..... Base: All respondents	5
S2. Please choose the region you currently work in. .... Base: All respondents	8
D1. How many people does your company employ? ..... Base: All respondents	10
D2. Which of the following best describes your company sector? ..... Base: All respondents	16
D3. Which London borough is your business based in? ..... Base: All respondents	24
Q1_SUM. Excluding seasonality, how have the last three months compared to the previous three months in terms of: SUMMARY TABLE ..... Base: All respondents	32
Q1_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of: Domestic sales ..... Base: All respondents	33
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	35
Q1_5. Excluding seasonality, how have the last three months compared to the previous three months in terms of: Employment ..... Base: All respondents	37
Q1_6. Excluding seasonality, how have the last three months compared to the previous three months in terms of: Cashflow ..... Base: All respondents	39
Q2_SUM. Excluding seasonality, how have the last three months compared to the previous three months in terms of: SUMMARY TABLE ..... Base: All respondents	41
Q2_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of: Export sales ..... Base: All respondents	42
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	44
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	46
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	47
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	49
Q3. How do you expect your workforce size to change over the next three months? ..... Base: All respondents	51
Q4. Have you tried to recruit in the past three months? ..... Base: All respondents	53
Q5. Were the jobs... ..... Base: All who have tried to recruit in past three months	55
Q6. Did you meet any difficulties in recruiting? ..... Base: All who have tried to recruit in past three months	57
Q7. In which category did you have difficulties? ..... Base: All who had difficulties in recruiting	59

## QES Q4 2018

Q8_SUM. How have your investment plans changed over the past three months? SUMMARY TABLE .....	61
Base: All respondents	
Q8_1. How have your investment plans changed over the past three months? Plant and equipment .....	62
Base: All respondents	
Q8_2. How have your investment plans changed over the past three months? Training .....	64
Base: All respondents	
Q9_SUM. Over the next twelve months what do you think will happen to your... SUMMARY TABLE .....	66
Base: All respondents	
Q9_1. Over the next twelve months what do you think will happen to your... Turnover .....	67
Base: All respondents	
Q9_2. Over the next twelve months what do you think will happen to your... Profitability .....	69
Base: All respondents	
Q10. Are you operating at... ..	71
Base: All respondents	
Q11. Over the next three months do you expect the price of your goods/ services to: .....	73
Base: All respondents	
Q12. Is your business under any pressure to raise prices from any of the following? .....	75
Base: All respondents	
Q13_SUM. Please indicate the extent to which the following have varied in the past 3 months. SUMMARY TABLE .....	77
Base: All respondents	
Q13_1. Please indicate the extent to which the following have varied in the past 3 months. Pressure from employees to increase wages .....	78
Base: All respondents	
Q13_2. Please indicate the extent to which the following have varied in the past 3 months. Cost of borrowing .....	81
Base: All respondents	
Q13_3. Please indicate the extent to which the following have varied in the past 3 months. Cost of my business's energy .....	84
Base: All respondents	
Q13_4. Please indicate the extent to which the following have varied in the past 3 months. Cost of fuel .....	86
Base: All respondents	
Q13_5. Please indicate the extent to which the following have varied in the past 3 months. Cost of raw materials (sourced domestically) .....	89
Base: All respondents	
Q13_6. Please indicate the extent to which the following have varied in the past 3 months. Cost of raw materials (sourced internationally) .....	92
Base: All respondents	
Q14. Which of the following are more of a concern to your business than they were three months ago? .....	95
Base: All respondents	
Q15_SUM. What do you expect to happen to the following economic indicators over the next twelve months? SUMMARY TABLE .....	97
Base: All respondents	
Q15_1. What do you expect to happen to the following economic indicators over the next twelve months? UK economic growth .....	98
Base: All respondents	
Q15_5. What do you expect to happen to the following economic indicators over the next twelve months? Economic prospects for London .....	100
Base: All respondents	
Q15_6. What do you expect to happen to the following economic indicators over the next twelve months? Economic prospects for your company .....	102
Base: All respondents	
Q16. Over the last three months, which of the following methods, if any, have you used to acquire new skills for your business? .....	104
Base: All respondents	

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1-9	258	258	-	12	45	60	36	24	55	10	16	27	231
	51%	57%	-	64%	64%	58%	53%	42%	46%	33%	41%	65%	50%
		b			ghij	ij							
10-19	28	-	28	4	3	6	-	4	5	4	1	6	22
	6%	-	53%	24%	5%	6%	-	7%	4%	12%	4%	14%	5%
		a								fh		l	
20-49	14	-	14	2	2	2	4	1	2	1	1	2	12
	3%	-	27%	9%	3%	2%	6%	1%	2%	3%	2%	6%	3%
		a											
50-99	5	-	5	-	1	1	2	-	2	-	-	1	4
	1%	-	10%	-	1%	1%	2%	-	2%	-	-	2%	1%
		a											
100-199	2	-	2	*	*	*	1	*	*	*	-	*	1
	*	-	3%	1%	*	*	1%	*	*	1%	-	1%	*
		a											
200-249	1	-	1	*	*	*	*	*	*	-	-	*	1
	*	-	2%	3%	*	*	*	*	*	-	-	1%	*
		a											
250-499	2	-	2	-	*	*	1	-	-	-	-	*	2
	*	-	3%	-	*	*	2%	-	-	-	-	1%	*
		a											
500+	1	-	1	-	-	*	-	*	*	-	-	-	1
	*	-	1%	-	-	*	-	*	*	-	-	-	*
		a											

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

**QES Q4 2018****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	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sole trader	197	197	-	-	19	35	24	28	56	15	20	5	192
	39%	43%	-	-	27%	33%	35%	48%	47%	50%	53%	11%	41%
		b				d		d	d	de		k	
Total number of employees	4351	1361	2990	300	536	869	1052	469	798	190	138	572	3779
Mean score	8.6	3.0	56.7	16.4	7.6	8.3	15.6	8.1	6.6	6.4	3.6	13.7	8.1
		a											
Standard deviation	39.51	2.05	112.24	39.77	25.94	43.26	54.83	51.27	36.42	15.56	5.68	40.13	39.47
Standard error	1.75	.11	9.81	10.63	3.06	4.64	8.46	6.62	3.41	2.27	.67	6.27	1.83

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1-9	258	142	116	28	198	32	36	221	100	157	76	164	17
	51%	53%	48%	59%	47%	86%	58%	50%	50%	51%	56%	47%	74%
					cd								
10-19	28	18	10	3	23	2	9	19	14	14	6	20	2
	6%	7%	4%	6%	5%	6%	14%	4%	7%	5%	4%	6%	7%
							g						
20-49	14	7	8	5	9	1	5	9	7	8	5	10	-
	3%	2%	3%	10%	2%	2%	9%	2%	3%	2%	3%	3%	-
				d			g						
50-99	5	5	*	4	1	*	5	*	4	1	2	3	*
	1%	2%	*	8%	*	1%	7%	*	2%	*	1%	1%	1%
				d			g						
100-199	2	2	-	1	1	*	1	1	1	*	1	1	*
	*	1%	-	1%	*	1%	2%	*	1%	*	*	*	1%
							g						
200-249	1	1	*	1	*	*	1	*	1	1	1	*	*
	*	*	*	1%	*	*	2%	*	*	*	*	*	1%
							g						
250-499	2	1	1	1	1	-	1	*	2	-	1	*	-
	*	*	*	2%	*	-	2%	*	1%	-	1%	*	-
				d			g						
500+	1	1	-	1	*	-	1	-	1	*	1	-	-
	*	*	-	1%	*	-	1%	-	*	*	1%	-	-
							g						
Sole trader	197	93	104	6	190	1	3	193	70	127	43	150	4
	39%	35%	43%	12%	45%	3%	5%	44%	35%	41%	32%	43%	17%
			a		ce		f				j		
Total number of employees	4351	2871	1480	1569	2459	323	2264	2087	2632	1719	2040	2134	177
Mean score	8.6	10.7	6.2	33.4	5.8	8.8	36.1	4.7	13.2	5.6	15.1	6.1	7.6
				d			g		i		k		

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Standard deviation	39.51	48.84	25.14	98.93	26.23	21.61	101.43	15.11	54.82	24.74	69.45	18.99	22.15
Standard error	1.75	2.88	1.69	12.00	1.31	3.55	10.04	.75	3.66	1.47	5.89	1.02	4.72

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

**QES Q4 2018****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
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Control of or having a say in budgeting or financial decisions	451 89%	410 90%	41 78%	17 94%	61 86%	88 84%	62 92%	51 88%	112 93%	28 92%	33 86%	37 88%	414 89%
Control of or having a say in operational decisions	441 87%	397 87%	43 82%	16 88%	60 85%	83 80%	59 87%	50 86%	113 94%	27 90%	33 86%	33 79%	408 88%
Recruitment (hiring new staff on a permanent or temporary basis)	247 49%	218 48%	29 55%	8 44%	34 48%	43 41%	39 58%	30 52%	57 48%	19 64%	16 43%	21 50%	226 49%
Directly managing one or more employees	235 46%	199 44%	37 69%	8 44%	38 54%	47 45%	39 58%	26 45%	53 44%	13 45%	12 31%	19 47%	216 46%
IT systems	290 57%	268 59%	22 41%	6 32%	35 50%	46 44%	52 77%	32 55%	84 70%	18 59%	17 44%	19 45%	271 58%
Procurement / supply chain management	269 53%	247 54%	22 42%	10 52%	35 50%	59 56%	41 61%	27 47%	63 53%	16 53%	18 47%	22 53%	247 53%

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



**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

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

**QES Q4 2018****S1. Which of the following responsibilities do you hold in your organisation?**

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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Control of or having a say in budgeting or financial decisions	451	243	208	45	374	32	54	397	172	278	121	309	21
	89%	91%	87%	95%	88%	88%	86%	89%	87%	90%	90%	89%	89%
Control of or having a say in operational decisions	441	230	210	36	372	32	49	392	166	275	118	304	19
	87%	86%	88%	77%	88%	87%	78%	88%	83%	89%	87%	87%	81%
Recruitment (hiring new staff on a permanent or temporary basis)	247	134	113	35	194	18	42	205	108	139	69	172	6
	49%	50%	47%	74%	46%	48%	66%	46%	54%	45%	51%	49%	25%
Directly managing one or more employees	235	128	107	32	180	23	43	193	104	132	72	153	10
	46%	48%	45%	68%	43%	63%	68%	43%	52%	43%	54%	44%	43%
IT systems	290	159	131	25	246	18	25	265	103	187	77	203	10
	57%	59%	55%	53%	58%	49%	39%	60%	52%	61%	57%	58%	44%
Procurement / supply chain management	269	141	129	28	225	17	29	240	98	171	80	181	8
	53%	52%	54%	60%	53%	46%	47%	54%	49%	56%	59%	52%	36%
None of the above	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

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

**QES Q4 2018****S2. Please choose the region you currently work 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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London	507	454	53	18	70	105	67	58	120	30	38	42	465
	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 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
London	507	268	239	47	423	37	63	444	199	308	135	349	23
	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 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0 sole trader	197	197	-	-	19	35	24	28	56	15	20	5	192
	39%	43%	-	-	27%	33%	35%	48%	47%	50%	53%	11%	41%
		b				d		d	d	de		k	
1-9	258	258	-	12	45	60	36	24	55	10	16	27	231
	51%	57%	-	64%	64%	58%	53%	42%	46%	33%	41%	65%	50%
		b			ghij	ij							
10-19	28	-	28	4	3	6	-	4	5	4	1	6	22
	6%	-	53%	24%	5%	6%	-	7%	4%	12%	4%	14%	5%
			a						fh		l		
20-49	14	-	14	2	2	2	4	1	2	1	1	2	12
	3%	-	27%	9%	3%	2%	6%	1%	2%	3%	2%	6%	3%
			a										
50-99	5	-	5	-	1	1	2	-	2	-	-	1	4
	1%	-	10%	-	1%	1%	2%	-	2%	-	-	2%	1%
			a										
100-199	2	-	2	*	*	*	1	*	*	*	-	*	1
	*	-	3%	1%	*	*	1%	*	*	1%	-	1%	*
			a										
200-249	1	-	1	*	*	*	*	*	*	-	-	*	1
	*	-	2%	3%	*	*	*	*	*	-	-	1%	*
			a										
250-499	2	-	2	-	*	*	1	-	-	-	-	*	2
	*	-	3%	-	*	*	2%	-	-	-	-	1%	*
			a										

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
500+	1	-	1	-	-	*	-	*	*	-	-	-	1
	*	-	1%	-	-	*	-	*	*	-	-	-	*
			a										
<b>NETS</b>													
Net: More than 9	53	-	53	7	6	10	8	6	9	5	2	10	43
	10%	-	100%	36%	9%	9%	12%	10%	8%	17%	6%	24%	9%
			a									l	
<b>BCC NETS</b>													
Net: 0-19	482	454	28	16	67	102	60	56	116	29	37	38	445
	95%	100%	53%	88%	96%	97%	88%	98%	96%	96%	98%	90%	96%
			b								f		
Net: 20-199	21	-	21	2	3	3	6	1	4	1	1	3	18
	4%	-	40%	10%	4%	3%	10%	2%	3%	4%	2%	8%	4%
			a										
Net: 200-499	3	-	3	*	*	*	1	*	*	-	-	1	2
	1%	-	6%	3%	1%	*	2%	*	*	-	-	2%	*
			a										
Net: 500+	1	-	1	-	-	*	-	*	*	-	-	-	1
	*	-	1%	-	-	*	-	*	*	-	-	-	*
			a										
<b>ONS NETS</b>													
Net: 0-9	454	454	-	12	64	95	60	52	111	25	36	32	422
	90%	100%	-	64%	91%	91%	88%	90%	92%	83%	94%	76%	91%
			b										k

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: 10-19	28	-	28	4	3	6	-	4	5	4	1	6	22
	6%	-	53%	24%	5%	6%	-	7%	4%	12%	4%	14%	5%
		a							fh			l	
Net: 20-49	14	-	14	2	2	2	4	1	2	1	1	2	12
	3%	-	27%	9%	3%	2%	6%	1%	2%	3%	2%	6%	3%
		a											
Net: 50-99	5	-	5	-	1	1	2	-	2	-	-	1	4
	1%	-	10%	-	1%	1%	2%	-	2%	-	-	2%	1%
		a											
Net: 100-249	3	-	3	1	*	*	1	*	*	*	-	1	2
	1%	-	6%	4%	*	*	1%	1%	*	1%	-	2%	*
		a											
Net: 250+	3	-	3	-	*	1	1	*	*	-	-	*	2
	*	-	5%	-	*	*	2%	*	*	-	-	1%	*
		a											

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0 sole trader	197	93	104	6	190	1	3	193	70	127	43	150	4
	39%	35%	43%	12%	45%	3%	5%	44%	35%	41%	32%	43%	17%
		a		ce			f				j		
1-9	258	142	116	28	198	32	36	221	100	157	76	164	17
	51%	53%	48%	59%	47%	86%	58%	50%	50%	51%	56%	47%	74%
				cd									
10-19	28	18	10	3	23	2	9	19	14	14	6	20	2
	6%	7%	4%	6%	5%	6%	14%	4%	7%	5%	4%	6%	7%
				g									
20-49	14	7	8	5	9	1	5	9	7	8	5	10	-
	3%	2%	3%	10%	2%	2%	9%	2%	3%	2%	3%	3%	-
				d			g						-
50-99	5	5	*	4	1	*	5	*	4	1	2	3	*
	1%	2%	*	8%	*	1%	7%	*	2%	*	1%	1%	1%
				d			g						
100-199	2	2	-	1	1	*	1	1	1	*	1	1	*
	*	1%	-	1%	*	1%	2%	*	1%	*	*	*	1%
				g			g						
200-249	1	1	*	1	*	*	1	*	1	1	1	*	*
	*	*	*	1%	*	*	2%	*	*	*	*	*	1%
				g			g						
250-499	2	1	1	1	1	-	1	*	2	-	1	*	-
	*	*	*	2%	*	-	2%	*	1%	-	1%	*	-
				d			g						
500+	1	1	-	1	*	-	1	-	1	*	1	-	-
	*	*	-	1%	*	-	1%	-	*	*	1%	-	-
				g			g						

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



**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: More than 9	53	33	20	13	35	4	23	30	29	24	16	35	2
	10%	12%	8%	29%	8%	11%	37%	7%	14%	8%	12%	10%	9%
				de			g		i				
<b>BCC NETS</b>													
Net: 0-19	482	253	230	36	411	35	48	434	184	298	125	334	23
	95%	94%	96%	77%	97%	96%	77%	98%	92%	97%	93%	96%	98%
				c	c		f		h				
Net: 20-199	21	13	8	9	11	1	11	10	12	9	7	14	*
	4%	5%	3%	18%	3%	4%	18%	2%	6%	3%	5%	4%	2%
				de			g						
Net: 200-499	3	2	1	2	1	*	2	1	2	1	2	1	*
	1%	1%	1%	4%	*	*	4%	*	1%	*	1%	*	1%
				d			g						
Net: 500+	1	1	-	1	*	-	1	-	1	*	1	-	-
	*	*	-	1%	*	-	1%	-	*	*	1%	-	-
							g						
<b>ONS NETS</b>													
Net: 0-9	454	235	219	34	388	33	40	415	170	284	119	314	21
	90%	88%	92%	71%	92%	89%	63%	93%	86%	92%	88%	90%	91%
				c	c		f		h				
Net: 10-19	28	18	10	3	23	2	9	19	14	14	6	20	2
	6%	7%	4%	6%	5%	6%	14%	4%	7%	5%	4%	6%	7%
							g						
Net: 20-49	14	7	8	5	9	1	5	9	7	8	5	10	-
	3%	2%	3%	10%	2%	2%	9%	2%	3%	2%	3%	3%	-
				d			g						

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: 50-99	5	5	*	4	1	*	5	*	4	1	2	3	*
	1%	2%	*	8%	*	1%	7%	*	2%	*	1%	1%	1%
				d			g						
Net: 100-249	3	3	*	1	1	*	2	1	2	1	1	1	*
	1%	1%	*	2%	*	1%	3%	*	1%	*	1%	*	1%
							g						
Net: 250+	3	2	1	2	1	-	2	*	2	*	2	*	-
	*	1%	*	3%	*	-	3%	*	1%	*	2%	*	-
				d			g						

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

**QES Q4 2018****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	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing	3	-	3	3	-	-	-	-	-	-	-	3	-
	1%	-	6%	16%	-	-	-	-	-	-	-	7%	-
			a									l	
Production	15	12	4	15	-	-	-	-	-	-	-	15	-
	3%	3%	7%	84%	-	-	-	-	-	-	-	37%	-
			a									l	
Construction	23	20	3	-	23	-	-	-	-	-	-	23	-
	5%	4%	6%	-	33%	-	-	-	-	-	-	56%	-
					efghij							l	
Motor trades	8	6	2	-	-	8	-	-	-	-	-	-	8
	2%	1%	3%	-	-	7%	-	-	-	-	-	-	2%
						dghj							
Wholesale	27	26	2	-	-	27	-	-	-	-	-	-	27
	5%	6%	3%	-	-	26%	-	-	-	-	-	-	6%
						dfghij							
Retail	40	36	3	-	-	40	-	-	-	-	-	-	40
	8%	8%	6%	-	-	38%	-	-	-	-	-	-	9%
						dfghij							
Transport & storage (inc. postal)	8	8	1	-	-	8	-	-	-	-	-	-	8
	2%	2%	2%	-	-	8%	-	-	-	-	-	-	2%
						dghij							
Accommodation & food services	22	20	2	-	-	22	-	-	-	-	-	-	22
	4%	4%	4%	-	-	21%	-	-	-	-	-	-	5%
						dfghij							

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

**QES Q4 2018****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	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Information & communication	67	60	8	-	-	-	67	-	-	-	-	-	67
	13%	13%	15%	-	-	-	100%	-	-	-	-	-	14%
							deghij						k
Finance & insurance	20	17	3	-	-	-	-	20	-	-	-	-	20
	4%	4%	6%	-	-	-	-	35%	-	-	-	-	4%
								defhij					
Property	47	44	3	-	47	-	-	-	-	-	-	-	47
	9%	10%	6%	-	67%	-	-	-	-	-	-	-	10%
					efghij								k
Professional, scientific & technical	120	111	9	-	-	-	-	-	120	-	-	-	120
	24%	24%	17%	-	-	-	-	-	100%	-	-	-	26%
									defgij				k
Business administration and support services	37	35	2	-	-	-	-	37	-	-	-	-	37
	7%	8%	5%	-	-	-	-	65%	-	-	-	-	8%
								defhij					
Public administration and defence	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
Education	14	13	1	-	-	-	-	-	-	14	-	-	14
	3%	3%	2%	-	-	-	-	-	-	47%	-	-	3%
										defghj			
Health	16	12	4	-	-	-	-	-	-	16	-	-	16
	3%	3%	7%	-	-	-	-	-	-	53%	-	-	3%
			a							defghj			

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

**QES Q4 2018****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
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Arts, entertainment, recreation and other services	38 8%	36 8%	2 5%	- -	- -	- -	- -	- -	- -	- -	38 100%	- -	38 8%
Other services	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
<b>NETS</b>													
Net: Manufacturing	42 8%	32 7%	10 19%	18 100%	23 33%	- -	- -	- -	- -	- -	- -	42 100%	- -
			a		efghij							l	
Net: Services	465 92%	422 93%	43 81%	- -	47 67%	105 100%	67 100%	58 100%	120 100%	30 100%	38 100%	- -	465 100%
		b			d	d	d	d	d	d	d		k
Net: Agriculture, forestry & fishing / production	18 4%	12 3%	7 13%	18 100%	- -	- -	- -	- -	- -	- -	- -	18 44%	- -
			a									l	
Net: Construction / property	70 14%	64 14%	6 12%	- -	70 100%	- -	- -	- -	- -	- -	- -	23 56%	47 10%
					efghij							l	

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

**QES Q4 2018****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	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: Motor trades / wholesale / retail / transport & storage / accommodation & food services	105	95	10	-	-	105	-	-	-	-	-	-	105
	21%	21%	18%	-	-	100%	-	-	-	-	-	-	23%
						dfghij							k
Net: Finance & insurance/ Business administration & support services	58	52	6	-	-	-	-	58	-	-	-	-	58
	11%	12%	11%	-	-	-	-	100%	-	-	-	-	12%
								defhij					k
Net: Public administration and defence / education / health	30	25	5	-	-	-	-	-	-	30	-	-	30
	6%	5%	10%	-	-	-	-	-	-	100%	-	-	6%
										defghj			

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

## QES Q4 2018

### 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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing	3 1%	3 1%	- -	- -	3 1%	- -	- -	3 1%	- -	3 1%	- -	3 1%	- -
Production	15 3%	6 2%	9 4%	3 6%	11 3%	1 3%	4 7%	11 3%	2 1%	14 4%	11 8%	3 1%	1 5%
Construction	23 5%	5 2%	18 8%	4 8%	20 5%	- -	7 12%	16 4%	11 6%	12 4%	9 6%	15 4%	* 1%
Motor trades	8 2%	2 1%	6 3%	- -	8 2%	- -	2 2%	6 1%	3 2%	5 1%	2 2%	6 2%	- -
Wholesale	27 5%	14 5%	13 5%	* 1%	22 5%	5 13%	3 5%	24 5%	9 5%	18 6%	11 8%	15 4%	2 7%
Retail	40 8%	26 10%	14 6%	4 8%	34 8%	2 4%	6 9%	34 8%	21 11%	19 6%	20 15%	19 6%	- -
Transport & storage (inc. postal)	8 2%	* *	8 3%	2 3%	7 2%	* *	2 3%	7 2%	1 *	8 3%	2 1%	5 2%	2 7%
Accommodation & food services	22 4%	18 7%	4 2%	2 4%	19 4%	2 4%	1 2%	21 5%	10 5%	12 4%	4 3%	16 5%	2 6%
Information & communication	67 13%	30 11%	37 16%	11 23%	52 12%	5 15%	12 18%	56 13%	34 17%	34 11%	17 13%	48 14%	2 10%

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Finance & insurance	20 4%	15 6%	5 2%	1 3%	17 4%	2 6%	1 2%	19 4%	8 4%	13 4%	1 1%	18 5%	1 5%
Property	47 9%	29 11%	18 8%	2 5%	38 9%	7 19%	7 11%	40 9%	24 12%	23 7%	10 7%	35 10%	2 10%
Professional, scientific & technical	120 24%	62 23%	58 24%	9 18%	105 25%	6 17%	5 8%	115 26%	35 17%	85 28%	25 19%	88 25%	7 29%
Business administration and support services	37 7%	20 7%	17 7%	4 8%	31 7%	2 6%	1 2%	36 8%	7 3%	31 10%	3 2%	32 9%	2 10%
Public administration and defence	-	-	-	-	-	-	-	-	-	-	-	-	-
Education	14 3%	9 3%	5 2%	1 3%	12 3%	1 2%	1 2%	13 3%	6 3%	8 3%	4 3%	9 3%	1 3%
Health	16 3%	7 3%	9 4%	1 2%	15 3%	* 1%	5 8%	11 2%	9 5%	7 2%	6 4%	9 3%	1 3%
Arts, entertainment, recreation and other services	38 8%	21 8%	17 7%	4 9%	31 7%	3 9%	6 10%	32 7%	20 10%	18 6%	10 7%	28 8%	1 2%
Other services	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

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



**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: Manufacturing	42	14	27	7	34	1	11	30	13	28	19	21	1
	8%	5%	11%	14%	8%	3%	18%	7%	7%	9%	14%	6%	6%
		a					g				k		
Net: Services	465	254	212	40	389	36	51	414	186	280	115	328	22
	92%	95%	89%	86%	92%	97%	82%	93%	93%	91%	86%	94%	94%
		b					f				j		
Net: Agriculture, forestry & fishing / production	18	9	9	3	14	1	4	14	2	16	11	6	1
	4%	3%	4%	6%	3%	3%	7%	3%	1%	5%	8%	2%	5%
									h		k		
Net: Construction / property	70	34	36	6	58	7	14	56	36	35	19	49	3
	14%	13%	15%	12%	14%	19%	23%	13%	18%	11%	14%	14%	11%
							g		i				
Net: Motor trades / wholesale / retail / transport & storage / accommodation & food services	105	60	45	8	89	8	13	92	44	61	39	61	5
	21%	22%	19%	16%	21%	21%	21%	21%	22%	20%	29%	18%	21%
											k		
Net: Finance & insurance/ Business administration & support services	58	35	23	5	48	5	2	56	14	44	4	50	3
	11%	13%	9%	11%	11%	13%	4%	12%	7%	14%	3%	14%	15%
							f		h		j		

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: Public administration and defence / education / health	30	16	14	2	27	1	6	24	15	15	10	18	2
	6%	6%	6%	5%	6%	3%	10%	5%	7%	5%	7%	5%	6%

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

**QES Q4 2018****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
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Barking and Dagenham	1	-	1	-	-	1	-	-	-	*	-	-	1
	*	-	2%	-	-	1%	-	-	-	1%	-	-	*
			a										
Barnet	35	34	1	2	5	11	4	3	5	4	2	5	31
	7%	7%	2%	13%	7%	10%	5%	6%	4%	13%	4%	11%	7%
			b										
Bexley	5	4	1	-	-	3	-	1	1	-	-	-	5
	1%	1%	2%	-	-	2%	-	2%	1%	-	-	-	1%
Brent	18	16	3	3	6	1	5	1	*	2	1	7	12
	4%	3%	5%	17%	8%	1%	7%	2%	*	6%	1%	16%	2%
					eh		eh			eh		l	
Bromley	12	11	*	-	4	3	2	2	-	*	-	2	9
	2%	2%	1%	-	5%	3%	4%	4%	-	1%	-	6%	2%
					h		h	h					
City of London	23	15	8	*	3	3	4	3	8	*	1	3	21
	5%	3%	15%	1%	4%	3%	6%	5%	7%	1%	4%	6%	4%
			a										
City of Westminster	42	35	7	2	8	11	1	6	10	-	4	2	40
	8%	8%	13%	10%	12%	11%	1%	11%	8%	-	10%	5%	9%
					fi	i		i	i		i		
Camden	26	21	4	-	4	5	3	4	4	2	3	*	25
	5%	5%	8%	-	6%	4%	5%	8%	4%	6%	9%	1%	5%
Croydon	4	3	1	-	1	-	1	-	-	-	2	-	4
	1%	1%	1%	-	2%	-	1%	-	-	-	4%	-	1%
											h		

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Ealing	19 4%	18 4%	1 2%	* 1%	5 7% h	2 1%	5 7% h	2 4%	1 1%	1 3%	3 7% h	* 1%	18 4%
Enfield	14 3%	11 3%	2 4%	* 1%	-	3 3%	8 12% deghj	-	2 1%	1 3%	-	* 1%	13 3%
Greenwich	8 2%	7 2%	1 2%	-	1 2%	* *	2 4%	2 4%	1 1%	-	1 3%	-	8 2%
Hackney	18 4%	16 4%	2 3%	5 26%	1 1%	5 5%	3 4%	-	1 1%	2 5%	2 4%	5 11% l	13 3%
Hammersmith and Fulham	19 4%	18 4%	* 1%	-	1 2%	* *	2 4%	5 8% ej	8 6% ej	2 8% ej	-	-	19 4%
Haringey	18 4%	17 4%	1 2%	-	3 4%	5 4%	2 4%	3 6%	3 3%	1 3%	1 3%	-	18 4%
Harrow	24 5%	20 4%	3 6%	3 19%	4 5%	5 5%	3 5%	-	6 5%	1 3%	2 4%	5 11% l	19 4%
Havering	8 2%	6 1%	1 3%	-	5 7% gh	2 2%	-	-	-	-	* 1%	4 10% l	4 1%
Hillingdon	9 2%	9 2%	* 1%	-	-	2 1%	2 4%	1 2%	4 3%	-	* 1%	-	9 2%

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hounslow	14 3%	13 3%	1 2%	- -	- -	1 1%	- -	1 2%	11 9%	2 5%	- -	- -	14 3%
Islington	18 3%	16 4%	1 3%	- -	2 3%	5 5%	2 4%	1 2%	5 4%	1 3%	1 3%	- -	18 4%
Kensington and Chelsea	15 3%	14 3%	2 3%	- -	2 2%	4 4%	- -	6 10%	1 1%	1 3%	2 4%	- -	15 3%
Kingston upon Thames	12 2%	12 3%	1 2%	- -	* 1%	- -	* 1%	- -	10 8%	1 3%	1 1%	* 1%	12 3%
Lambeth	17 3%	16 4%	* 1%	- -	4 5%	5 4%	2 4%	- -	3 3%	2 5%	2 4%	1 3%	15 3%
Lewisham	13 3%	12 3%	1 2%	- -	* 1%	5 5%	2 4%	1 2%	3 2%	* 1%	1 3%	- -	13 3%
Merton	10 2%	10 2%	* *	- -	- -	5 4%	- -	2 4%	1 1%	- -	2 4%	- -	10 2%
Newham	6 1%	5 1%	* 1%	- -	- -	3 3%	- -	* *	- -	2 8%	- -	- -	6 1%
Redbridge	8 2%	8 2%	- -	- -	1 2%	2 1%	2 4%	- -	3 2%	- -	- -	1 3%	6 1%
Richmond upon Thames	20 4%	20 4%	* 1%	- -	- -	5 5%	- -	2 4%	10 8%	2 5%	1 3%	- -	20 4%

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Southwark	22 4%	18 4%	4 7%	2 12%	1 2%	4 4%	7 11% dh	1 2%	3 2%	1 4%	2 6%	3 8%	19 4%
Sutton	9 2%	9 2%	- -	- -	1 2%	2 1%	2 4% h	1 2%	- -	2 5% h	2 4% h	1 3%	8 2%
Tower Hamlets	11 2%	10 2%	1 2%	- -	- -	2 1%	* 1%	1 2%	5 4%	2 5%	1 3%	- -	11 2%
Waltham Forest	10 2%	9 2%	1 2%	- -	3 4%	2 1%	- -	2 3%	3 2%	- -	2 4%	2 4%	9 2%
Wandsworth	22 4%	21 5%	1 2%	- -	5 7%	3 3%	- -	3 5%	9 8%	1 3%	1 3%	- -	22 5%
Outside London	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
<b>NETS</b>													
Net: Inner London	268 53%	235 52%	33 63% a	9 49%	34 49%	60 57%	30 45%	35 61%	62 52%	16 53%	21 56%	14 35%	254 55% k
Net: Outer London	239 47%	219 48% b	20 37%	9 51%	36 51%	45 43%	37 55%	23 39%	58 48%	14 47%	17 44%	27 65% l	212 45%

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Barking and Dagenham	1	-	1	-	1	-	-	1	1	-	-	1	-
	*	-	*	-	*	-	-	*	*	-	-	*	-
Barnet	35	-	35	2	30	3	1	34	14	21	12	20	3
	7%	-	15%	4%	7%	8%	1%	8%	7%	7%	9%	6%	13%
			a					f					
Bexley	5	-	5	1	4	-	1	4	3	2	1	4	-
	1%	-	2%	3%	1%	-	1%	1%	1%	1%	1%	1%	-
			a										
Brent	18	-	18	3	13	3	1	17	4	15	11	5	2
	4%	-	8%	6%	3%	8%	2%	4%	2%	5%	8%	1%	10%
			a								k		
Bromley	12	-	12	-	12	-	*	11	5	7	1	11	-
	2%	-	5%	-	3%	-	1%	3%	3%	2%	1%	3%	-
			a										
City of London	23	23	-	11	8	4	6	17	13	11	8	12	4
	5%	9%	-	23%	2%	11%	10%	4%	6%	3%	6%	3%	17%
		b		d		d	g						
City of Westminster	42	42	-	1	36	5	6	36	15	27	9	31	2
	8%	16%	-	1%	9%	13%	9%	8%	7%	9%	6%	9%	10%
		b		c		c							
Camden	26	26	-	2	22	2	3	23	9	16	6	18	2
	5%	10%	-	4%	5%	5%	4%	5%	5%	5%	4%	5%	6%
		b											
Croydon	4	-	4	-	4	-	-	4	1	3	1	3	-
	1%	-	1%	-	1%	-	-	1%	*	1%	*	1%	-
			a										
Ealing	19	-	19	*	17	1	*	18	9	10	2	15	1
	4%	-	8%	*	4%	3%	*	4%	5%	3%	2%	4%	3%
			a										

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Enfield	14 3%	- -	14 6% a	2 4%	11 3%	* 1%	3 5%	11 2%	5 3%	9 3%	5 3%	9 3%	- -
Greenwich	8 2%	- -	8 3% a	1 2%	7 2%	- -	- -	8 2%	3 2%	5 2%	1 1%	7 2%	- -
Hackney	18 4%	18 7% b	- -	4 9% d	14 3%	- -	8 13% g	10 2%	6 3%	11 4%	7 5%	11 3%	- -
Hammersmith and Fulham	19 4%	19 7% b	- -	1 2%	16 4%	1 3%	1 2%	17 4%	6 3%	12 4%	2 2%	15 4%	1 5%
Haringey	18 4%	18 7% b	- -	- -	18 4%	- -	* 1%	18 4%	7 3%	11 4%	7 5%	11 3%	- -
Harrow	24 5%	- -	24 10% a	3 7%	19 4%	2 4%	7 11% g	17 4%	10 5%	14 4%	11 8% k	11 3%	2 7%
Havering	8 2%	- -	8 3% a	2 3%	5 1%	1 3%	* 1%	7 2%	1 1%	6 2%	2 1%	6 2%	- -
Hillingdon	9 2%	- -	9 4% a	- -	9 2%	- -	- -	9 2%	* *	9 3% h	2 1%	8 2%	- -
Hounslow	14 3%	- -	14 6% a	1 3%	12 3%	* 1%	- -	14 3%	7 4%	7 2%	1 1%	11 3%	1 5%
Islington	18 3%	18 7% b	- -	1 1%	17 4%	- -	1 1%	17 4%	13 6% i	5 2%	5 4%	13 4%	- -

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



**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Kensington and Chelsea	15 3%	15 6% b	- -	* 1%	14 3%	1 4%	2 4%	13 3%	1 1%	14 5% h	7 5%	8 2%	* 1%
Kingston upon Thames	12 2%	- -	12 5% a	2 4%	10 2%	1 2%	3 5%	9 2%	3 1%	9 3%	4 3%	8 2%	- -
Lambeth	17 3%	17 6% b	- -	- -	13 3%	4 11% cd	1 1%	16 4%	11 5% i	6 2%	2 1%	14 4%	1 3%
Lewisham	13 3%	13 5% b	- -	- -	12 3%	1 3%	3 5%	9 2%	5 2%	8 3%	- -	13 4% j	- -
Merton	10 2%	- -	10 4% a	- -	9 2%	2 4%	- -	10 2%	2 1%	8 2%	2 1%	9 2%	- -
Newham	6 1%	6 2% b	- -	- -	5 1%	1 2%	* *	5 1%	2 1%	3 1%	2 1%	4 1%	* 1%
Redbridge	8 2%	- -	8 3% a	1 3%	6 2%	- -	1 2%	6 1%	2 1%	5 2%	4 3%	4 1%	- -
Richmond upon Thames	20 4%	- -	20 8% a	- -	18 4%	2 7% c	* 1%	20 4%	6 3%	15 5%	3 2%	15 4%	2 10%
Southwark	22 4%	22 8% b	- -	3 6%	18 4%	1 2%	6 10% g	16 3%	9 5%	13 4%	10 8% k	10 3%	1 5%
Sutton	9 2%	- -	9 4% a	2 4%	8 2%	- -	2 4%	7 2%	5 2%	5 2%	1 *	9 3%	- -

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Tower Hamlets	11	11	-	1	9	-	2	9	4	7	1	10	-
	2%	4%	-	3%	2%	-	3%	2%	2%	2%	1%	3%	-
		b											
Waltham Forest	10	-	10	3	7	1	2	8	7	4	3	7	1
	2%	-	4%	6%	2%	2%	3%	2%	3%	1%	2%	2%	2%
			a	d									
Wandsworth	22	22	-	1	20	1	1	21	10	12	4	19	-
	4%	8%	-	1%	5%	3%	1%	5%	5%	4%	3%	5%	-
		b											
Outside London	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>NETS</b>													
Net: Inner London	268	268	-	24	223	21	41	228	111	157	69	188	11
	53%	100%	-	52%	53%	57%	65%	51%	56%	51%	51%	54%	49%
		b					g						
Net: Outer London	239	-	239	23	200	16	22	217	88	151	66	161	12
	47%	-	100%	48%	47%	43%	35%	49%	44%	49%	49%	46%	51%
			a				f						

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

**QES Q4 2018**

**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	507	85	284	138	-1
	100%	17%	56%	27%	
Domestic sales	507	84	306	116	-1
	100%	17%	60%	23%	
Business domestic orders	507	74	335	97	*
	100%	15%	66%	19%	
Employment	507	30	422	54	*
	100%	6%	83%	11%	

**QES Q4 2018**

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

**Domestic sales**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	84	70	14	-	10	27	14	6	17	5	5	78
	17%	15%	27%	-	14%	26%	21%	10%	14%	15%	14%	14%	17%
			a			gh							
Same	(0)	306	275	31	15	46	52	43	34	68	21	26	279
	60%	61%	59%	81%	65%	50%	64%	59%	57%	71%	70%	65%	60%
						e			e	e	e		
Down	(-1)	116	109	8	3	15	25	10	18	35	4	6	108
	23%	24%	14%	19%	21%	24%	15%	31%	29%	14%	16%	21%	23%
		b						i	i				
Mean score	-.1	-.1	.1	-.2	-.1	*	.1	-.2	-.1	*	*	-.1	-.1
			a			g	g						
Standard deviation	.63	.62	.64	.40	.59	.71	.60	.61	.64	.55	.56	.59	.63
Standard error	.03	.03	.06	.11	.07	.08	.09	.08	.06	.08	.07	.09	.03

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

**QES Q4 2018**

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

**Domestic sales**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	*l	
Significance Level: 95%														
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22	
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1)	84	43	41	25	55	4	21	64	41	43	26	58	*
		17%	16%	17%	54%	13%	10%	33%	14%	20%	14%	19%	17%	1%
					de			g						
Same	(0)	306	172	134	17	278	12	31	275	131	176	71	231	4
		60%	64%	56%	36%	66%	32%	50%	62%	66%	57%	53%	66%	19%
						ce		f		i		j		
Down	(-1)	116	52	64	5	90	21	11	105	27	89	38	59	19
		23%	20%	27%	10%	21%	58%	18%	24%	14%	29%	28%	17%	80%
						c	cd				h	k		
Mean score	-.1	*	-.1	.4	-.1	-.5	.2	-.1	.1	-.1	-.1	*	-.8	
				de	e		g		i					
Standard deviation	.63	.60	.66	.68	.58	.67	.70	.61	.58	.64	.68	.58	.44	
Standard error	.03	.04	.04	.08	.03	.11	.07	.03	.04	.04	.06	.03	.09	

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

**QES Q4 2018**

**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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1) 74	61	13	3	6	21	13	6	16	3	5	8	66
	15%	13%	25%	18%	8%	20%	20%	11%	13%	10%	14%	20%	14%
		a				d							
Same	(0) 335	300	35	13	55	63	49	35	72	22	26	28	307
	66%	66%	67%	69%	77%	60%	73%	60%	60%	75%	68%	67%	66%
					egh								
Down	(-1) 97	94	4	2	10	20	5	17	32	5	7	5	92
	19%	21%	7%	13%	14%	20%	7%	29%	27%	15%	18%	12%	20%
		b						df	df				
Mean score	*	-.1	.2	.1	-.1	*	.1	-.2	-.1	*	*	.1	-.1
			a				gh						
Standard deviation	.58	.58	.55	.57	.47	.63	.51	.61	.62	.51	.57	.57	.58
Standard error	.03	.03	.05	.15	.06	.07	.08	.08	.06	.07	.07	.09	.03

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

## QES Q4 2018

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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1) 74	37	38	21	52	2	20	54	38	37	31	44	*
	15%	14%	16%	44%	12%	6%	32%	12%	19%	12%	23%	12%	1%
				de			g		i		k		
Same	(0) 335	188	147	24	297	14	35	300	142	193	76	252	7
	66%	70%	62%	52%	70%	39%	56%	68%	71%	63%	56%	72%	30%
		b			ce		f		i		j		
Down	(-1) 97	43	54	2	75	20	7	90	19	78	28	53	16
	19%	16%	23%	4%	18%	55%	12%	20%	10%	25%	21%	15%	69%
				c	cd		f		h				
Mean score	*	*	-.1	.4	-.1	-.5	.2	-.1	.1	-.1	*	*	-.7
				de	e		g		i				
Standard deviation	.58	.55	.62	.58	.55	.62	.64	.56	.53	.60	.66	.53	.50
Standard error	.03	.03	.04	.07	.03	.10	.06	.03	.04	.04	.06	.03	.11

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

**QES Q4 2018****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	
		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	507	376	131	14	72	87	42	60	114	47	71	41	466	
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1)	30	19	11	1	6	4	9	1	2	4	3	5	
	6%	4%	21%	6%	8%	4%	14%	2%	2%	13%	8%	12%	5%	
			a		h		egh			gh				
Same	(0)	422	386	36	14	55	92	50	51	105	22	33	29	
	83%	85%	69%	76%	79%	88%	74%	88%	87%	75%	87%	70%	84%	
		b		i								k		
Down	(-1)	54	49	5	3	9	9	8	6	13	4	2	7	
	11%	11%	10%	19%	13%	8%	12%	10%	11%	13%	6%	18%	10%	
Mean score	*	-.1	.1	-.1	*	*	*	-.1	-.1	*	*	-.1	*	
			a								h			
Standard deviation	.41	.38	.55	.49	.46	.35	.51	.34	.35	.51	.37	.55	.39	
Standard error	.02	.02	.05	.13	.05	.04	.08	.04	.03	.07	.04	.09	.02	

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



## QES Q4 2018

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

### Employment

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22	
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1)	30	20	10	17	10	3	17	14	21	9	11	18	1
		6%	7%	4%	37%	2%	9%	27%	3%	11%	3%	8%	5%	6%
					de	d	g		i					
Same	(0)	422	223	200	27	375	21	34	388	163	260	107	302	13
		83%	83%	84%	57%	89%	56%	55%	87%	82%	84%	80%	87%	55%
						ce	f							
Down	(-1)	54	25	29	3	38	13	12	43	15	40	16	29	9
		11%	9%	12%	6%	9%	36%	18%	10%	7%	13%	12%	8%	39%
						cd	g		h					
Mean score	*	*	-.1	.3	-.1	-.3	.1	-.1	*	-.1	*	*	*	-.3
				de	e		g		i					
Standard deviation	.41	.41	.40	.59	.33	.62	.67	.35	.43	.38	.45	.36	.60	
Standard error	.02	.02	.03	.07	.02	.10	.07	.02	.03	.02	.04	.02	.13	

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

**QES Q4 2018****Q1\_6. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Cashflow**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1) 85	70	15	3	9	27	8	6	19	6	8	7	78
	17%	15%	29%	15%	13%	25%	12%	10%	16%	20%	20%	17%	17%
		a	a			g							
Same	(0) 284	254	30	12	45	45	44	34	64	17	23	27	257
	56%	56%	57%	67%	64%	43%	65%	58%	53%	57%	60%	65%	55%
			e		e		e				e		
Down	(-1) 138	130	8	3	16	33	16	19	37	7	8	7	130
	27%	29%	15%	19%	23%	31%	23%	32%	31%	23%	20%	18%	28%
		b	b										
Mean score	-.1	-.1	.1	*	-.1	-.1	-.1	-.2	-.1	*	*	*	-.1
			a								g		
Standard deviation	.66	.65	.65	.59	.59	.76	.59	.61	.67	.67	.64	.60	.66
Standard error	.03	.03	.06	.16	.07	.08	.09	.08	.06	.10	.08	.09	.03

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

**QES Q4 2018**

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

**Cashflow**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1) 85	48	38	22	61	2	20	65	40	45	33	52	*
	17%	18%	16%	46%	14%	6%	32%	15%	20%	15%	24%	15%	1%
				de			g				k		
Same	(0) 284	155	129	18	257	9	29	255	118	167	56	223	5
	56%	58%	54%	37%	61%	26%	46%	57%	59%	54%	42%	64%	20%
					ce		f				j		
Down	(-1) 138	65	72	8	105	25	14	124	41	97	46	73	19
	27%	24%	30%	16%	25%	68%	22%	28%	21%	31%	34%	21%	79%
					cd					h	k		
Mean score	-.1	-.1	-.1	.3	-.1	-.6	.1	-.1	*	-.2	-.1	-.1	-.8
				de	e		g		i				
Standard deviation	.66	.65	.66	.74	.62	.61	.73	.64	.64	.66	.76	.60	.44
Standard error	.03	.04	.04	.09	.03	.10	.07	.03	.04	.04	.06	.03	.09

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

**QES Q4 2018**

**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
Export sales	507 100%	47 9%	113 22%	31 6%	315 62%	.1
Business export orders	507 100%	40 8%	122 24%	29 6%	316 62%	.1

**QES Q4 2018****Q2\_1. Excluding seasonality, how have the last three months compared to the previous three months in terms of:****Export sales**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
		a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466	
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1)	47	38	10	1	3	16	12	1	8	2	3	4	43
		9%	8%	18%	6%	5%	15%	18%	2%	7%	7%	9%	11%	9%
			a			dg	dgh							
Same	(0)	113	95	18	8	12	32	9	11	22	6	12	12	101
		22%	21%	34%	44%	18%	30%	14%	20%	19%	21%	31%	29%	22%
			a			f								
Down	(-1)	31	27	5	2	4	4	2	7	11	-	2	2	29
		6%	6%	9%	12%	5%	3%	4%	12%	9%	-	6%	5%	6%
								ei	i					
My business does not export outside the UK	315	294	21	7	51	54	43	38	79	22	21	23	292	
	62%	65%	39%	38%	72%	52%	64%	66%	66%	72%	55%	55%	63%	
		b			ej				e	e				
Mean score	.1	.1	.2	-.1	*	.2	.4	-.3	-.1	.2	.1	.1	.1	
						h								
Standard deviation	.64	.63	.66	.55	.62	.57	.68	.60	.68	.46	.58	.60	.64	
Standard error	.04	.05	.07	.16	.13	.08	.15	.13	.10	.12	.10	.13	.05	

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

## QES Q4 2018

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

### Export sales

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1) 47 9%	25 9%	23 9%	17 37% de	27 6%	3 9%	14 22% g	33 7%	27 14% i	20 7%	20 15% k	27 8%	1 3%
Same	(0) 113 22%	70 26% b	43 18%	12 26%	97 23%	4 10%	12 19%	102 23%	43 22%	70 23%	28 21%	81 23%	4 18%
Down	(-1) 31 6%	15 6%	16 7%	1 1%	19 4%	12 32% cd	4 7%	27 6%	5 2%	26 9% h	6 5%	15 4%	10 43%
My business does not export outside the UK	315 62%	158 59%	157 66%	17 35% ce	280 66%	18 48%	33 52%	282 64% f	123 62%	191 62%	81 60%	226 65%	8 36%
Mean score	.1	.1	.1	.5 d	.1	-.5	.3 g	*	.3 i	-.1	.3	.1	-.6
Standard deviation	.64	.60	.69	.55	.56	.79	.73	.61	.59	.63	.66	.58	.59
Standard error	.04	.05	.08	.08	.05	.18	.09	.05	.06	.06	.08	.05	.15

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

**QES Q4 2018****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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1)	40	7	*	2	11	13	2	8	2	2	2	38
		8%	14%	1%	3%	11%	19%	3%	7%	6%	6%	5%	8%
			a				dghj						
Same	(0)	122	20	9	15	35	8	11	25	6	13	14	108
		24%	37%	49%	21%	33%	12%	20%	21%	21%	33%	35%	23%
			a			f					f		
Down	(-1)	29	5	2	2	4	3	7	9	-	2	2	27
		6%	10%	12%	3%	3%	5%	12%	8%	-	4%	5%	6%
								ei					
My business does not export outside the UK	316	296	20	7	51	56	43	38	78	22	21	23	293
	62%	65%	39%	38%	72%	53%	64%	66%	64%	74%	56%	55%	63%
		b			ej				e				
Mean score	.1	.1	.1	-.2	*	.2	.4	-.3	*	.2	*	*	.1
Standard deviation	.60	.60	.63	.45	.50	.53	.72	.61	.64	.43	.50	.49	.61
Standard error	.04	.05	.07	.14	.10	.08	.16	.13	.09	.12	.09	.10	.04

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

## QES Q4 2018

**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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22	
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1)	40	23	17	15	22	3	13	26	26	14	16	22	1
		8%	9%	7%	32%	5%	9%	21%	6%	13%	5%	12%	6%	4%
					de			g		i		k		
Same	(0)	122	69	53	16	101	5	12	110	42	80	29	88	5
		24%	26%	22%	34%	24%	14%	20%	25%	21%	26%	22%	25%	23%
					e									
Down	(-1)	29	15	14	*	18	11	4	25	6	23	7	14	9
		6%	6%	6%	1%	4%	29%	6%	6%	3%	8%	5%	4%	37%
						cd					h			
My business does not export outside the UK	316	161	155	16	282	18	33	283	125	191	82	225	8	
	62%	60%	65%	34%	67%	48%	53%	64%	63%	62%	61%	65%	36%	
					ce			f						
Mean score	.1	.1	*	.5	*	-.4	.3	*	.3	-.1	.2	.1	-.5	
				d			g		i					
Standard deviation	.60	.60	.61	.52	.53	.78	.70	.57	.60	.56	.65	.54	.64	
Standard error	.04	.05	.07	.08	.04	.18	.09	.05	.06	.05	.08	.05	.16	

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



**QES Q4 2018****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
Export sales	192	47	113	31	-	.1
	100%	25%	59%	16%	-	
Business export orders	191	40	122	29	-	.1
	100%	21%	64%	15%	-	

**QES Q4 2018****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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	*d	e	*f	*g	h	*i	j	*k	l
Unweighted Total	217	134	83	11	24	47	20	23	46	14	32	22	195
Weighted Total	192	160	32	11	19	51	24	20	41	8	17	19	174
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1) 47 25%	38 24%	10 30%	1 9%	3 18%	16 31%	12 51%	1 7%	8 20%	2 25%	3 19%	4 24%	43 25%
Same	(0) 113 59%	95 60%	18 56%	8 72%	12 64%	32 62%	9 39%	11 58%	22 54%	6 75%	12 68%	12 65%	101 58%
Down	(-1) 31 16%	27 17%	5 14%	2 19%	4 18%	4 7%	2 10%	7 35%	11 26%	- e	2 13%	2 12%	29 17%
My business does not export outside the UK	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Mean score	.1	.1	.2	-.1	*	.2 h	.4	-.3	-.1	.2	.1	.1	.1
Standard deviation	.64	.63	.66	.55	.62	.57	.68	.60	.68	.46	.58	.60	.64
Standard error	.04	.05	.07	.16	.13	.08	.15	.13	.10	.12	.10	.13	.05

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

**QES Q4 2018****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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	*e	f	g	h	i	j	k	*l
Significance Level: 95%													
Unweighted Total	217	134	83	47	151	19	59	158	104	113	61	141	15
Weighted Total	192	110	82	30	143	19	30	162	76	117	54	123	15
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Up	(1) 47	25	23	17	27	3	14	33	27	20	20	27	1
	25%	23%	28%	57%	19%	17%	47%	21%	36%	17%	37%	22%	5%
				d			g		i		k		
Same	(0) 113	70	43	12	97	4	12	102	43	70	28	81	4
	59%	64%	53%	41%	68%	20%	39%	63%	57%	60%	51%	66%	29%
				c	c		f	f					
Down	(-1) 31	15	16	1	19	12	4	27	5	26	6	15	10
	16%	14%	20%	2%	13%	63%	15%	17%	7%	23%	12%	12%	67%
				c	c				h	h			
My business does not export outside the UK	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
Mean score	.1	.1	.1	.5	.1	-.5	.3	*	.3	-.1	.3	.1	-.6
				d	d		g		i				
Standard deviation	.64	.60	.69	.55	.56	.79	.73	.61	.59	.63	.66	.58	.59
Standard error	.04	.05	.08	.08	.05	.18	.09	.05	.06	.06	.08	.05	.15

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

**QES Q4 2018****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	
		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		216	84	11	24	46	20	23	47	14	31	22	194	
Weighted Total		191	32	11	19	49	24	20	43	8	17	19	172	
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1)	40	7	*	2	11	13	2	8	2	2	2	38	
		21%	23%	2%	11%	23%	53%	8%	19%	21%	13%	11%	22%	
Same	(0)	122	20	9	15	35	8	11	25	6	13	14	108	
		64%	61%	79%	76%	70%	34%	57%	60%	79%	77%	77%	62%	
Down	(-1)	29	5	2	2	4	3	7	9	-	2	2	27	
		15%	16%	19%	12%	7%	13%	35%	22%	-	10%	12%	16%	
									e					
My business does not export outside the UK		-	-	-	-	-	-	-	-	-	-	-	-	
		-	-	-	-	-	-	-	-	-	-	-	-	
Mean score		.1	.1	-.2	*	.2	.4	-.3	*	.2	*	*	.1	
Standard deviation		.60	.63	.45	.50	.53	.72	.61	.64	.43	.50	.49	.61	
Standard error		.04	.07	.14	.10	.08	.16	.13	.09	.12	.09	.10	.04	

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

**QES Q4 2018****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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	*e	f	g	h	i	j	k	*l	
Significance Level: 95%														
Unweighted Total	216	131	85	47	150	19	58	158	101	115	59	142	15	
Weighted Total	191	108	83	31	141	19	29	162	74	117	52	124	15	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Up	(1)	40	23	17	15	22	3	13	26	26	14	16	22	1
		21%	21%	20%	48%	15%	17%	45%	16%	35%	12%	31%	18%	7%
					d		g		i		k			
Same	(0)	122	69	53	16	101	5	12	110	42	80	29	88	5
		64%	64%	63%	51%	72%	27%	42%	68%	57%	68%	56%	71%	36%
					c		f						j	
Down	(-1)	29	15	14	*	18	11	4	25	6	23	7	14	9
		15%	14%	17%	1%	13%	56%	13%	16%	8%	20%	13%	11%	58%
					c		h							
My business does not export outside the UK	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mean score	.1	.1	*	.5	*	-.4	.3	*	.3	-.1	.2	.1	-.5	
				d			g		i					
Standard deviation	.60	.60	.61	.52	.53	.78	.70	.57	.60	.56	.65	.54	.64	
Standard error	.04	.05	.07	.08	.04	.18	.09	.05	.06	.05	.08	.05	.16	

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

**QES Q4 2018****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 a	10+ b	Agriculture, forestry & fishing / production c	Construction / property d	Motor trades / wholesale / retail / transport & storage / accommodation & food services e	Information & communication f	Finance & insurance / business administration and support g	Professional, scientific & technical h	Public administration and defence / education / health i	Arts, entertainment, recreation and other services j	Manufacturing k	Services l
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	47	34	13	3	6	8	11	5	9	2	4	7	40
	9%	7%	25%	17%	8%	7%	16%	9%	7%	7%	11%	16%	9%
		a											
Stay the same	423	388	35	14	58	89	52	48	105	27	31	34	389
	83%	85%	67%	78%	82%	85%	76%	83%	87%	89%	81%	82%	84%
		b											
Fall	37	33	4	1	7	8	5	5	6	1	3	1	36
	7%	7%	8%	6%	10%	7%	8%	8%	5%	4%	8%	3%	8%

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	47	24	23	47	-	-	24	23	25	22	24	22	1
	9%	9%	10%	100%	-	-	38%	5%	12%	7%	18%	6%	3%
				de			g		i		k		
Stay the same	423	223	200	-	423	-	34	389	166	257	104	310	10
	83%	83%	84%	-	100%	-	54%	88%	83%	84%	77%	89%	43%
					ce		f				j		
Fall	37	21	16	-	-	37	5	32	8	28	7	17	13
	7%	8%	7%	-	-	100%	8%	7%	4%	9%	5%	5%	54%
						cd			h				

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	63	40	23	4	14	13	12	2	5	6	6	11	51
	12%	9%	44%	22%	20%	12%	17%	4%	4%	20%	16%	27%	11%
		a		gh	h	gh			gh	gh	l		
No	444	415	30	14	56	92	56	56	115	24	32	30	414
	88%	91%	56%	78%	80%	88%	83%	96%	96%	80%	84%	73%	89%
		b						dfij	defij			k	

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



**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	63	41	22	24	34	5	63	-	38	24	27	34	1
	12%	15%	9%	51%	8%	14%	100%	-	19%	8%	20%	10%	6%
		b		de			g		i		k		
No	444	228	217	23	389	32	-	444	161	284	108	314	22
	88%	85%	91%	49%	92%	86%	-	100%	81%	92%	80%	90%	94%
		a			c	c	f		h		j		

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

**QES Q4 2018****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%	a	b	*c	*d	*e	*f	*g	*h	*i	*j	*k	l	
Unweighted Total	102	35	67	5	20	18	14	7	14	13	11	17	85
Weighted Total	63	40	23	4	14	13	12	2	5	6	6	11	51
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full-time	37	19	18	2	9	8	7	2	4	2	3	7	29
	58%	47%	78%	38%	64%	61%	57%	80%	83%	30%	55%	62%	57%
		a											
Part-time	32	24	9	4	9	6	6	-	1	4	3	8	25
	52%	60%	37%	89%	61%	46%	49%	-	21%	71%	45%	68%	48%
		b											
Permanent	16	10	6	-	6	2	3	*	3	1	1	2	14
	26%	26%	25%	-	39%	18%	26%	20%	55%	22%	9%	18%	28%
Temporary	11	8	3	-	2	4	1	-	*	1	2	1	10
	18%	21%	13%	-	17%	33%	7%	-	9%	19%	36%	10%	20%

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

**QES Q4 2018****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	102	73	29	44	50	8	102	-	69	33	41	58	3
Weighted Total	63	41	22	24	34	5	63	-	38	24	27	34	1
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Full-time	37	25	12	12	21	3	37	-	27	10	13	22	1
	58%	61%	53%	52%	62%	61%	58%	-	70%	40%	48%	65%	90%
								i					
Part-time	32	18	14	15	14	4	32	-	16	16	15	16	1
	52%	44%	65%	62%	41%	76%	52%	-	41%	68%	55%	47%	85%
				d					h				
Permanent	16	8	8	4	9	3	16	-	8	9	6	10	-
	26%	21%	35%	16%	27%	64%	26%	-	20%	36%	22%	30%	-
Temporary	11	6	5	4	7	-	11	-	6	5	5	6	-
	18%	16%	22%	17%	22%	-	18%	-	16%	22%	19%	18%	-

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

**QES Q4 2018****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	102	35	67	5	20	18	14	7	14	13	11	17	85
Weighted Total	63	40	23	4	14	13	12	2	5	6	6	11	51
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	36	23	13	2	9	10	4	1	4	4	3	6	30
	58%	59%	56%	38%	62%	79%	35%	57%	74%	60%	45%	54%	59%
No	26	16	10	3	5	3	7	1	1	2	3	5	21
	42%	41%	44%	62%	38%	21%	65%	43%	26%	40%	55%	46%	41%

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

**QES Q4 2018****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	102	73	29	44	50	8	102	-	69	33	41	58	3
Weighted Total	63	41	22	24	34	5	63	-	38	24	27	34	1
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Yes	36	21	15	11	20	5	36	-	22	14	16	19	1
	58%	53%	67%	48%	59%	100%	58%	-	57%	60%	60%	55%	85%
No	26	19	7	12	14	-	26	-	17	10	11	16	*
	42%	47%	33%	52%	41%	-	42%	-	43%	40%	40%	45%	15%

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

**QES Q4 2018****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	59	21	38	3	11	13	7	4	9	7	5	9	50
Weighted Total	36	23	13	2	9	10	4	1	4	4	3	6	30
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Skilled manual/ technical	18	13	5	-	5	6	3	1	2	1	1	4	14
	51%	56%	42%	-	53%	57%	81%	46%	62%	32%	20%	65%	48%
Professional/ managerial	13	5	9	2	1	1	4	1	2	1	2	3	11
	37%	21%	67%	100%	14%	14%	95%	89%	44%	25%	60%	42%	36%
Un/ semi-skilled	8	7	1	-	1	5	-	-	-	2	1	-	8
	23%	30%	10%	-	14%	49%	-	-	-	43%	20%	-	28%
Clerical	4	2	1	-	2	*	1	-	*	-	-	-	4
	10%	10%	10%	-	27%	4%	14%	-	10%	-	-	-	12%

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

**QES Q4 2018****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	59	39	20	22	29	8	59	-	36	23	25	32	2
Weighted Total	36	21	15	11	20	5	36	-	22	14	16	19	1
	100%	100%	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%
Skilled manual/ technical	18	10	8	6	11	1	18	-	13	5	7	11	-
	51%	47%	57%	56%	55%	24%	51%	-	59%	38%	46%	59%	-
Professional/ managerial	13	7	6	8	4	2	13	-	10	4	5	7	1
	37%	34%	41%	71%	19%	32%	37%	-	44%	27%	30%	39%	100%
Un/ semi-skilled	8	6	2	1	7	1	8	-	4	4	6	2	-
	23%	30%	13%	5%	33%	24%	23%	-	18%	31%	39%	11%	-
Clerical	4	2	2	*	1	2	4	-	1	3	1	3	*
	10%	10%	11%	3%	7%	39%	10%	-	3%	22%	5%	15%	12%

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

**QES Q4 2018****Q8\_SUM. How have your investment plans changed over the past three months?****SUMMARY TABLE**

Base: All respondents

	Total	Increased	Same	Decreased	Mean
Training	507	52	409	46	*
	100%	10%	81%	9%	
Plant and equipment	507	51	409	48	*
	100%	10%	81%	9%	



**QES Q4 2018****Q8\_1. How have your investment plans changed over the past three months?****Plant and equipment**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased	(1)	51	10	*	3	11	17	2	8	6	3	2	48
	10%	9%	19%	1%	5%	11%	25%	4%	7%	20%	7%	6%	10%
			a				degj			dghj			
Same	(0)	409	39	15	60	86	43	51	100	22	33	35	374
	81%	81%	73%	80%	85%	82%	64%	88%	83%	72%	87%	83%	80%
		b			f	f		fi	f		fi		
Decreased	(-1)	48	4	3	8	8	7	5	12	2	2	5	43
	9%	10%	8%	19%	11%	8%	11%	8%	10%	8%	6%	11%	9%
Mean score	*	*	.1	-.2	-.1	*	.1	*	*	.1	*	-.1	*
			a				dgh			dgh			
Standard deviation	.44	.43	.51	.42	.39	.43	.59	.34	.41	.52	.36	.41	.44
Standard error	.02	.02	.04	.11	.05	.05	.09	.04	.04	.08	.04	.06	.02

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

**QES Q4 2018****Q8\_1. How have your investment plans changed over the past three months?****Plant and equipment**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased	(1) 51	27	23	16	35	-	15	36	25	26	29	21	1
	10%	10%	10%	34%	8%	-	23%	8%	13%	8%	21%	6%	4%
				de			g				k		
Same	(0) 409	219	190	29	363	17	46	363	165	243	98	304	7
	81%	82%	79%	61%	86%	45%	74%	82%	83%	79%	72%	87%	30%
					ce							j	
Decreased	(-1) 48	22	26	2	25	20	2	46	9	39	8	24	15
	9%	8%	11%	5%	6%	55%	3%	10%	4%	13%	6%	7%	66%
					cd			f		h			
Mean score	*	*	*	.3	*	-.5	.2	*	.1	*	.1	*	-.6
				de	e		g		i		k		
Standard deviation	.44	.43	.45	.56	.38	.50	.48	.43	.40	.46	.50	.36	.58
Standard error	.02	.03	.03	.07	.02	.08	.05	.02	.03	.03	.04	.02	.12

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

**QES Q4 2018****Q8\_2. How have your investment plans changed over the past three months?****Training**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466	
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased	(1)	52	41	11	1	6	6	17	2	11	5	4	7	45
	10%	9%	21%	6%	8%	6%	25%	4%	9%	17%	10%	16%	10%	
			a				deghj			g				
Same	(0)	409	371	38	14	57	91	43	50	98	23	33	30	379
	81%	82%	72%	76%	80%	87%	64%	86%	81%	78%	87%	71%	81%	
		b		f		f		f	f	f	f			
Decreased	(-1)	46	43	4	3	8	8	7	6	11	2	1	5	41
	9%	9%	7%	19%	11%	7%	11%	10%	9%	5%	3%	12%	9%	
Mean score	*	*	.1	-.1	*	*	.1	-.1	*	.1	.1	*	*	
			a				g			g	g			
Standard deviation	.44	.43	.51	.49	.44	.37	.59	.37	.44	.46	.35	.54	.43	
Standard error	.02	.02	.04	.13	.05	.04	.09	.05	.04	.07	.04	.08	.02	

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

**QES Q4 2018****Q8\_2. How have your investment plans changed over the past three months?****Training**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased (1)	52	25	26	24	25	3	20	32	31	20	26	24	2
	10%	9%	11%	51%	6%	8%	32%	7%	16%	7%	20%	7%	7%
				de			g		i		k		
Same (0)	409	225	184	22	372	15	41	367	163	246	103	301	5
	81%	84%	77%	47%	88%	41%	66%	83%	82%	80%	76%	86%	20%
					ce		f				j		
Decreased (-1)	46	18	28	1	26	19	1	45	5	41	6	24	17
	9%	7%	12%	2%	6%	52%	2%	10%	2%	13%	4%	7%	73%
			a					f		h			
Mean score	*	*	*	.5	*	-.4	.3	*	.1	-.1	.2	*	-.7
				de	e		g		i		k		
Standard deviation	.44	.40	.48	.55	.35	.64	.51	.42	.41	.44	.46	.37	.61
Standard error	.02	.02	.03	.07	.02	.11	.05	.02	.03	.03	.04	.02	.13

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

**QES Q4 2018****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	507	162	210	135	.1
	100%	32%	41%	27%	
Profitability	507	137	223	147	*
	100%	27%	44%	29%	

**QES Q4 2018****Q9\_1. Over the next twelve months what do you think will happen to your...****Turnover**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase	(1) 162 32%	141 31%	21 40%	10 55%	17 25%	39 37%	19 28%	15 27%	36 30%	12 42%	13 34%	17 40%	146 31%
Stay the same	(0) 210 41%	185 41%	25 47%	5 26%	35 50%	40 38%	36 54%	20 35%	44 37%	12 41%	17 45%	16 39%	193 41%
Decrease	(-1) 135 27%	128 28%	7 13%	3 19%	18 26%	26 25%	12 18%	22 38%	40 33%	5 18%	8 21%	9 21%	127 27%
Mean score	.1	*	.3 a	.4	*	.1	.1	-.1	*	.2 gh	.1	.2	*
Standard deviation	.76	.77	.69	.80	.72	.78	.68	.80	.80	.74	.74	.76	.76
Standard error	.03	.04	.06	.21	.08	.08	.10	.10	.07	.11	.09	.12	.04

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

**QES Q4 2018****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 a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increase (1)	162 32%	89 33%	73 31%	39 82% de	122 29% e	1 3%	30 48% g	132 30%	68 34%	94 31%	63 47% k	98 28%	1 4%
Stay the same (0)	210 41%	118 44%	92 39%	8 16% ce	197 47% ce	4 12%	24 38%	185 42%	96 48% i	113 37%	37 28%	169 49% j	3 12%
Decrease (-1)	135 27%	61 23%	74 31% a	1 1% cd	104 24% c	31 85%	8 13%	127 29% f	34 17%	101 33% h	34 25%	82 23%	20 84%
Mean score	.1	.1	*	.8 de	* e	-.8	.3 g	* g	.2 i	* i	.2 k	* k	-.8
Standard deviation	.76	.74	.79	.42	.73	.48	.71	.76	.70	.80	.83	.72	.51
Standard error	.03	.04	.05	.05	.04	.08	.07	.04	.05	.05	.07	.04	.11

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

**QES Q4 2018****Q9\_2. Over the next twelve months what do you think will happen to your...****Profitability**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466	
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1)	137	118	19	5	13	34	17	12	31	12	13	9	128
		27%	26%	36%	26%	19%	33%	25%	21%	26%	39%	34%	20%	28%
			a							d	d			
Stay the same	(0)	223	197	26	10	37	42	31	25	48	13	16	27	196
		44%	43%	50%	56%	53%	40%	46%	42%	40%	45%	42%	65%	42%
												l		
Decrease	(-1)	147	140	8	3	20	29	20	21	41	5	9	6	141
		29%	31%	14%	19%	28%	27%	29%	36%	34%	17%	24%	15%	30%
			b						i	i			k	k
Mean score	*	*	.2	.1	-.1	.1	*	-.1	-.1	.2	.1	.1	*	
			a							dgh				
Standard deviation	.75	.75	.68	.68	.69	.78	.74	.75	.77	.72	.76	.60	.76	
Standard error	.03	.04	.06	.18	.08	.08	.11	.10	.07	.11	.09	.09	.04	

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



**QES Q4 2018****Q9\_2. Over the next twelve months what do you think will happen to your...****Profitability**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22	
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increase	(1)	137	83	54	32	103	2	23	114	56	81	52	84	*
		27%	31%	22%	67%	24%	6%	37%	26%	28%	26%	39%	24%	1%
			b		de	e		g			k			
Stay the same	(0)	223	116	107	15	205	3	26	197	104	119	41	179	2
		44%	43%	45%	32%	48%	9%	41%	44%	52%	39%	31%	51%	9%
					e	ce			i		j			
Decrease	(-1)	147	69	78	1	115	31	14	134	39	108	41	85	21
		29%	26%	33%	1%	27%	86%	22%	30%	20%	35%	30%	24%	90%
					c	cd			h					
Mean score	*	.1	-.1	.7	*	-.8	.2	*	.1	-.1	.1	*	-.9	
		b		de	e		g		i					
Standard deviation	.75	.75	.74	.50	.72	.53	.76	.75	.69	.78	.83	.70	.35	
Standard error	.03	.04	.05	.06	.04	.09	.07	.04	.05	.05	.07	.04	.07	

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full capacity	199	170	29	2	36	44	34	14	35	15	20	13	186
	39%	37%	54%	10%	51%	42%	50%	24%	29%	49%	52%	32%	40%
		a			gh	g	gh		gh	gh	gh		
Below full capacity	308	284	24	16	35	61	34	44	85	15	18	28	280
	61%	63%	46%	90%	49%	58%	50%	76%	71%	51%	48%	68%	60%
		b						defij	dfij				

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Full capacity	199	111	88	25	166	8	38	161	199	-	55	142	2
	39%	41%	37%	53%	39%	23%	61%	36%	100%	-	41%	41%	11%
				de	e		g		i				
Below full capacity	308	157	151	22	257	28	24	284	-	308	80	207	21
	61%	59%	63%	47%	61%	77%	39%	64%	-	100%	59%	59%	89%
				c	cd		f		h				

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

**QES Q4 2018****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	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Rise	135	119	16	11	19	39	17	4	25	10	10	19	115
	27%	26%	30%	59%	26%	37%	25%	7%	21%	34%	26%	47%	25%
					g	gh	g		g	g	g	l	
Stay the same	349	314	35	6	49	61	48	50	88	18	28	21	328
	69%	69%	66%	35%	70%	58%	71%	87%	73%	61%	72%	50%	70%
								dehi	e			k	
Fall	23	21	2	1	3	5	2	3	7	2	1	1	22
	5%	5%	4%	6%	4%	5%	4%	6%	6%	5%	1%	3%	5%

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Rise	135	69	66	24	104	7	27	108	55	80	135	-	-
	27%	26%	27%	51%	24%	20%	43%	24%	28%	26%	100%	-	-
				de			g				k		
Stay the same	349	188	161	22	310	17	34	314	142	207	-	349	-
	69%	70%	68%	47%	73%	46%	55%	71%	71%	67%	-	100%	-
				ce			f				j		
Fall	23	11	12	1	10	13	1	22	2	21	-	-	23
	5%	4%	5%	2%	2%	34%	2%	5%	1%	7%	-	-	100%
				cd					h				

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Raw material prices	99	83	15	15	14	35	9	2	16	3	5	24	74
	19%	18%	29%	84%	19%	34%	13%	3%	14%	9%	13%	59%	16%
		a			g	dfghij	g		g		g	l	
Finance costs	96	85	11	1	17	33	15	7	13	5	5	4	92
	19%	19%	22%	4%	25%	32%	22%	13%	10%	18%	13%	10%	20%
					h	ghj							
Pay settlements	70	57	13	1	16	17	14	5	10	3	3	6	64
	14%	12%	25%	7%	22%	16%	21%	9%	9%	9%	8%	14%	14%
			a		hj		h						
Other overheads	170	155	14	2	17	39	21	18	45	12	16	8	162
	33%	34%	27%	13%	24%	37%	31%	31%	38%	40%	41%	18%	35%
										d		k	k
None of the above	193	181	13	2	22	20	29	32	61	14	14	9	185
	38%	40%	24%	12%	31%	19%	42%	56%	50%	46%	37%	22%	40%
		b					e	dej	de	e	e		k

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

**QES Q4 2018****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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Raw material prices	99	40	58	17	74	8	22	77	40	58	54	40	5
	19%	15%	24%	35%	17%	22%	35%	17%	20%	19%	40%	11%	21%
		a	d	g	k								
Finance costs	96	54	42	16	70	11	21	76	47	49	37	50	9
	19%	20%	18%	33%	17%	29%	33%	17%	24%	16%	28%	14%	39%
			d	g	k								
Pay settlements	70	38	32	10	49	11	15	54	36	34	24	38	7
	14%	14%	13%	21%	12%	30%	25%	12%	18%	11%	18%	11%	31%
			d	d	d	g	i	k					
Other overheads	170	94	75	21	134	14	26	143	61	109	58	103	9
	33%	35%	32%	45%	32%	39%	42%	32%	31%	35%	43%	30%	39%
			d	d	d	f	f	k					
None of the above	193	96	97	7	180	6	11	182	68	126	20	170	4
	38%	36%	41%	15%	43%	17%	18%	41%	34%	41%	15%	49%	15%
			ce	f	j								

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

**QES Q4 2018**

**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	507 100%	37 7%	199 39%	263 52%	5 1%	2 *	237 47%	7 1%	.5
Cost of my business's energy	507 100%	30 6%	165 33%	300 59%	11 2%	- -	195 39%	11 2%	.4
Cost of raw materials (sourced domestically)	507 100%	10 2%	130 26%	358 71%	7 1%	3 1%	139 27%	10 2%	.3
Cost of raw materials (sourced internationally)	507 100%	21 4%	98 19%	376 74%	8 2%	4 1%	119 24%	12 2%	.2
Pressure from employees to increase wages	507 100%	10 2%	90 18%	394 78%	11 2%	2 *	101 20%	13 2%	.2
Cost of borrowing	507 100%	13 3%	64 13%	419 83%	7 1%	3 1%	78 15%	10 2%	.2



**QES Q4 2018****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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
		a	b	*c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	10	4	-	1	4	2	1	*	1	1	*	10
		2%	1%	-	1%	4%	4%	2%	*	4%	2%	1%	2%
			a										
Increased slightly	(1)	90	17	2	14	23	15	7	18	5	7	7	83
		18%	32%	13%	19%	22%	22%	12%	15%	16%	18%	18%	18%
			a										
Stayed the same	(0)	394	29	16	51	76	50	50	97	24	30	33	361
		78%	55%	87%	72%	72%	75%	86%	81%	80%	78%	78%	78%
			b			e							
Decreased slightly	(-1)	11	3	-	5	3	*	-	2	-	1	1	10
		2%	5%	-	7%	3%	*	-	2%	-	1%	3%	2%
			a		g								
Decreased significantly	(-2)	2	*	-	-	-	-	-	2	-	-	-	2
		*	1%	-	-	-	-	-	1%	-	-	-	*
<b>NETS</b>													
Net: Increased		101	21	2	14	27	17	8	19	6	8	8	93
		20%	39%	13%	20%	25%	25%	14%	16%	20%	20%	19%	20%
			a										
Net: Decreased		13	3	-	5	3	*	-	4	-	1	1	11
		2%	6%	-	7%	3%	*	-	3%	-	1%	3%	2%
			a		g								

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

**QES Q4 2018**

**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 a	10+ b	Agriculture, forestry & fishing / production *c	Construction / property d	Motor trades / wholesale / retail / transport & storage / accommodation & food services e	Information & communication f	Finance & insurance / business administration and support g	Professional, scientific & technical h	Public administration and defence / education / health i	Arts, entertainment, recreation and other services j	Manufacturing k	Services l
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
Mean score	.2	.2	.4	.1	.1	.3	.3	.2	.1	.2	.2	.2	.2
Standard deviation	.51	.47	.74	.34	.54	.57	.53	.42	.48	.52	.50	.48	.51
Standard error	.02	.02	.06	.09	.06	.06	.08	.05	.05	.08	.06	.07	.02

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

**QES Q4 2018**

**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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2) 10 2%	7 3%	4 2%	2 4%	8 2%	- -	4 7%	6 1%	7 4%	3 1%	7 5%	4 1%	* 1%
Increased slightly	(1) 90 18%	47 18%	43 18%	22 48%	53 12%	15 41%	28 45%	62 14%	38 19%	52 17%	27 20%	55 16%	8 34%
Stayed the same	(0) 394 78%	207 77%	186 78%	22 46%	352 83%	20 53%	27 43%	367 83%	146 74%	247 80%	97 72%	283 81%	13 58%
Decreased slightly	(-1) 11 2%	6 2%	5 2%	1 2%	8 2%	2 5%	3 4%	8 2%	6 3%	5 2%	2 2%	7 2%	2 7%
Decreased significantly	(-2) 2 *	1 *	* *	- -	2 *	- -	- -	2 *	1 1%	* *	2 1%	- -	- -
<b>NETS</b>													
Net: Increased	101 20%	54 20%	47 20%	24 52%	61 14%	15 41%	33 53%	68 15%	45 23%	55 18%	33 25%	59 17%	8 35%
Net: Decreased	13 2%	7 3%	6 2%	1 2%	10 2%	2 5%	3 4%	10 2%	7 4%	5 2%	4 3%	7 2%	2 7%
Mean score	.2	.2	.2	.5 d	.1 d	.4 d	.6 g	.1 g	.2	.2	.3	.2	.3
Standard deviation	.51	.53	.49	.62	.47	.59	.70	.46	.59	.45	.64	.44	.62
Standard error	.02	.03	.03	.08	.02	.10	.07	.02	.04	.03	.05	.02	.13

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

**QES Q4 2018****Q13\_2. Please indicate the extent to which the following have varied in the past 3 months.****Cost of borrowing**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	13	3	2	3	5	-	-	2	2	1	2	11
	3%	2%	6%	9%	5%	5%	-	-	1%	5%	1%	5%	2%
			a										
Increased slightly	(1)	64	10	2	11	23	7	4	12	3	3	5	60
	13%	12%	19%	13%	16%	21%	10%	7%	10%	9%	8%	11%	13%
			a			ghj							
Stayed the same	(0)	419	37	14	52	75	61	54	105	26	33	33	386
	83%	84%	71%	78%	73%	72%	90%	93%	87%	86%	88%	80%	83%
		b					de	de	de		de		
Decreased slightly	(-1)	7	1	-	4	2	-	-	1	-	1	1	6
	1%	1%	2%	-	5%	2%	-	-	1%	-	1%	3%	1%
					h								
Decreased significantly	(-2)	3	1	-	1	*	-	-	1	-	*	-	3
	1%	1%	1%	-	2%	*	-	-	1%	-	1%	-	1%
<b>NETS</b>													
Net: Increased	78	64	13	4	14	27	7	4	14	4	4	7	71
	15%	14%	25%	22%	20%	26%	10%	7%	11%	14%	10%	17%	15%
			a		g	fghj							
Net: Decreased	10	8	2	-	5	2	-	-	2	-	1	1	9
	2%	2%	4%	-	7%	2%	-	-	2%	-	2%	3%	2%
					g								

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

**QES Q4 2018**

**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 a	10+ b	Agriculture, forestry & fishing / production *c	Construction / property d	Motor trades / wholesale / retail / transport & storage / accommodation & food services e	Information & communication f	Finance & insurance / business administration and support g	Professional, scientific & technical h	Public administration and defence / education / health i	Arts, entertainment, recreation and other services j	Manufacturing k	Services l
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
Mean score	.2	.1	.3	.3	.2	.3	.1	.1	.1	.2	.1	.2	.2
Standard deviation	.50	.47	.67	.64	.66	.60	.30	.26	.44	.51	.43	.57	.49
Standard error	.02	.02	.06	.17	.08	.06	.05	.03	.04	.07	.05	.09	.02

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

**QES Q4 2018**

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

**Cost of borrowing**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly (2)	13 3%	7 2%	7 3%	1 3%	9 2%	3 9% d	2 2%	12 3%	4 2%	9 3%	5 4%	7 2%	1 6%
Increased slightly (1)	64 13%	37 14%	28 12%	9 19%	47 11%	8 22%	10 16%	54 12%	26 13%	38 12%	22 16% k	31 9%	11 49%
Stayed the same (0)	419 83%	220 82%	199 83%	34 73%	360 85% ce	25 69%	50 80%	369 83%	165 83%	255 83%	104 77%	305 87% j	10 45%
Decreased slightly (-1)	7 1%	3 1%	3 1%	2 4%	5 1%	- -	1 1%	6 1%	1 1%	6 2%	2 2%	4 1%	- -
Decreased significantly (-2)	3 1%	2 1%	2 1%	1 2%	2 1%	- -	- -	3 1%	3 1%	* *	2 1%	2 *	- -
<b>NETS</b>													
Net: Increased	78 15%	43 16%	35 14%	10 22%	56 13% d	11 31% d	12 19%	66 15%	30 15%	47 15%	27 20% k	38 11%	13 55%
Net: Decreased	10 2%	5 2%	5 2%	3 5%	7 2%	- -	1 1%	9 2%	4 2%	6 2%	4 3%	6 2%	- -
Mean score	.2	.2	.1	.2	.1	.4 d	.2	.1	.1	.2	.2	.1	.6
Standard deviation	.50	.50	.50	.61	.46	.66 d	.48	.50	.51	.49	.58	.43	.61
Standard error	.02	.03	.03	.07	.02	.11	.05	.02	.03	.03	.05	.02	.13

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

**QES Q4 2018****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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly (2)	30 6%	26 6%	5 9%	1 6%	6 8%	10 9%	3 4%	1 2%	4 3%	2 8%	3 9%	3 7%	27 6%
Increased slightly (1)	165 33%	147 32%	18 34%	4 20%	21 30%	32 31%	23 34%	20 34%	48 40%	9 30%	9 24%	9 21%	157 34%
Stayed the same (0)	300 59%	271 60%	29 55%	14 74%	39 55%	61 58%	42 62%	36 62%	68 57%	17 56%	24 64%	26 63%	274 59%
Decreased slightly (-1)	11 2%	10 2%	1 2%	- -	5 7% h	2 2%	- -	1 2%	- -	2 6% h	1 4% h	4 9% l	8 2%
Decreased significantly (-2)	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
<b>NETS</b>													
Net: Increased	195 39%	173 38%	22 43%	5 26%	27 38%	42 40%	26 38%	21 36%	52 43%	11 38%	12 32%	12 28%	184 39%
Net: Decreased	11 2%	10 2%	1 2%	- -	5 7% h	2 2%	- -	1 2%	- -	2 6% h	1 4% h	4 9% l	8 2%
Mean score	.4	.4	.5	.3	.4	.5	.4	.4	.5	.4	.4	.3	.4
Standard deviation	.64	.63	.69	.60	.74	.69	.58	.56	.56	.73	.71	.73	.63
Standard error	.03	.03	.06	.16	.09	.07	.09	.07	.05	.11	.08	.11	.03

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

**QES Q4 2018**

**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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly (2)	30 6%	15 6%	15 6%	9 18% d	18 4%	3 9%	9 14%	21 5%	12 6%	18 6%	12 9%	16 4%	3 11%
Increased slightly (1)	165 33%	84 31%	81 34%	17 36%	131 31%	18 48% d	22 35%	143 32%	60 30%	106 34%	53 39% k	99 28%	14 60%
Stayed the same (0)	300 59%	163 61%	137 57%	21 45%	263 62% ce	16 44%	31 49%	269 61% f	121 61%	179 58%	70 52%	224 64% j	7 29%
Decreased slightly (-1)	11 2%	6 2%	6 2%	* 1%	11 3%	- -	1 2%	10 2%	6 3%	5 2%	1 *	11 3%	- -
Decreased significantly (-2)	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
<b>NETS</b>													
Net: Increased	195 39%	99 37%	96 40%	25 54% d	149 35%	21 56% d	31 49% g	165 37%	71 36%	124 40%	65 48% k	114 33%	16 71%
Net: Decreased	11 2%	6 2%	6 2%	* 1%	11 3%	- -	1 2%	10 2%	6 3%	5 2%	1 *	11 3%	- -
Mean score	.4	.4	.4	.7 d	.4 d	.6 d	.6 g	.4 g	.4 h	.4 i	.6 k	.3 k	.8 l
Standard deviation	.64	.63	.65	.78 d	.61 d	.64 d	.74 g	.62 g	.65 h	.63 i	.66 k	.61 k	.62 l
Standard error	.03	.04	.04	.09 d	.03 d	.11 d	.07 g	.03 g	.04 h	.04 i	.06 k	.03 k	.13 l

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



**QES Q4 2018****Q13\_4. Please indicate the extent to which the following have varied in the past 3 months.****Cost of fuel**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	37	6	1	10	11	*	1	9	2	3	5	32
	7%	7%	12%	7%	14%	11%	1%	2%	7%	5%	9%	13%	7%
					fg	fg							
Increased slightly	(1)	199	22	5	26	45	30	19	51	14	8	13	186
	39%	39%	41%	29%	38%	43%	45%	33%	42%	47%	22%	32%	40%
					j	j	j		j	j			
Stayed the same	(0)	263	24	12	32	47	37	38	59	13	26	20	243
	52%	53%	46%	64%	45%	45%	54%	65%	49%	45%	68%	49%	52%
								dehi			dehi		
Decreased slightly	(-1)	5	1	-	3	2	-	*	*	*	1	3	3
	1%	1%	2%	-	4%	1%	-	*	*	1%	1%	6%	1%
												l	
Decreased significantly	(-2)	2	-	-	-	-	-	-	1	1	-	-	2
	*	*	-	-	-	-	-	-	1%	3%	-	-	*
<b>NETS</b>													
Net: Increased	237	209	28	7	36	56	31	20	60	15	12	19	218
	47%	46%	53%	36%	51%	54%	46%	35%	50%	52%	31%	45%	47%
					j	gj			j	j			
Net: Decreased	7	6	1	-	3	2	-	*	1	1	1	3	5
	1%	1%	2%	-	4%	1%	-	*	1%	4%	1%	6%	1%
												l	

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

**QES Q4 2018**

**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
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
Mean score	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	.5	.5	.6	.4	.6	.6	.5	.4	.6	.5	.4	.5	.5
Standard deviation	.67	.66	.71	.64	.77	.69	.51	.53	.68	.74	.67	.80	.65
Standard error	.03	.03	.06	.17	.09	.07	.08	.07	.06	.11	.08	.12	.03

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

**QES Q4 2018**

Q13\_4. Please indicate the extent to which the following have varied in the past 3 months.

**Cost of fuel**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly (2)	37 7%	14 5%	23 10% a	6 12%	30 7%	2 4%	8 12%	30 7%	13 6%	25 8%	17 13% k	17 5%	3 12%
Increased slightly (1)	199 39%	91 34%	108 45% a	18 39%	167 40%	14 37%	24 38%	176 40%	67 34%	132 43% h	64 48% k	125 36%	10 44%
Stayed the same (0)	263 52%	156 58%	107 45% b	23 48%	219 52%	21 58%	31 50%	232 52%	115 58% i	148 48%	51 38%	202 58% j	10 44%
Decreased slightly (-1)	5 1%	4 2%	1 *	* 1%	5 1%	- -	* 1%	5 1%	3 2%	2 1%	* *	5 1%	- -
Decreased significantly (-2)	2 *	2 1%	- -	- -	2 *	- -	- -	2 *	1 1%	1 *	2 2% k	- -	- -
<b>NETS</b>													
Net: Increased	237 47%	105 39%	131 55% a	24 51%	197 47%	15 42%	31 50%	206 46%	80 40%	157 51% h	82 61% k	142 41%	13 56%
Net: Decreased	7 1%	6 2%	1 *	* 1%	7 2%	- -	* 1%	7 2%	5 2%	3 1%	2 2%	5 1%	- -
Mean score	.5	.4	.6 a	.6	.5	.5	.6	.5	.4	.6 h	.7 k	.4	.7
Standard deviation	.67	.65	.66	.71	.67	.59	.71	.66	.67	.66	.75	.61	.69
Standard error	.03	.04	.04	.09	.03	.10	.07	.03	.04	.04	.06	.03	.15

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

**QES Q4 2018**

**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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2)	10	3	1	1	4	-	*	3	1	1	1	8
	2%	2%	5%	6%	1%	4%	-	*	2%	3%	1%	4%	2%
			a										
Increased slightly	(1)	130	15	7	21	46	13	9	19	8	7	18	111
	26%	25%	28%	41%	30%	44%	19%	15%	16%	25%	18%	44%	24%
					h	fg hij						l	
Stayed the same	(0)	358	33	10	47	53	55	48	94	21	31	22	336
	71%	71%	63%	54%	67%	51%	81%	82%	78%	70%	81%	52%	72%
					e	e	e	e	e	e	e	k	k
Decreased slightly	(-1)	7	1	-	2	2	-	-	3	1	-	*	6
	1%	1%	2%	-	2%	2%	-	-	2%	3%	-	1%	1%
Decreased significantly	(-2)	3	1	-	-	*	-	1	2	-	-	-	3
	1%	1%	2%	-	-	*	-	2%	1%	-	-	-	1%
<b>NETS</b>													
Net: Increased	139	121	18	8	22	50	13	9	22	8	7	20	120
	27%	27%	34%	46%	31%	47%	19%	16%	18%	28%	19%	47%	26%
					g	dfghj						l	
Net: Decreased	10	8	2	-	2	2	-	1	4	1	-	*	10
	2%	2%	3%	-	2%	2%	-	2%	4%	3%	-	1%	2%
Mean score	.3	.3	.3	.5	.3	.5	.2	.1	.2	.3	.2	.5	.2
						dfghj						l	
Standard deviation	.55	.53	.68	.62	.52	.62	.40	.48	.56	.56	.44	.59	.54

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

**QES Q4 2018**

**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
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
Standard error	.02	.03	.06	.17	.06	.07	.06	.06	.05	.08	.05	.09	.03

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

**QES Q4 2018**

**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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22	
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Increased significantly	(2)	10	5	5	1	7	2	1	8	5	4	4	4	2
		2%	2%	2%	3%	2%	4%	2%	2%	3%	1%	3%	1%	7%
Increased slightly	(1)	130	62	68	20	100	9	22	107	47	83	67	55	8
		26%	23%	28%	43%	24%	24%	36%	24%	23%	27%	50%	16%	34%
					d			g				k		
Stayed the same	(0)	358	197	161	21	311	26	38	320	144	213	60	285	13
		71%	73%	67%	44%	73%	71%	60%	72%	73%	69%	45%	82%	55%
						c			f				j	
Decreased slightly	(-1)	7	3	4	3	4	-	*	6	2	5	3	3	1
		1%	1%	2%	7%	1%	-	1%	1%	1%	2%	2%	1%	3%
					d									
Decreased significantly	(-2)	3	2	2	2	2	-	*	3	1	2	1	2	-
		1%	1%	1%	3%	*	-	1%	1%	1%	1%	1%	1%	-
					d									
<b>NETS</b>														
Net: Increased	139	67	72	21	107	11	24	115	52	87	71	59	10	
	27%	25%	30%	46%	25%	29%	38%	26%	26%	28%	52%	17%	42%	
				d			g				k			
Net: Decreased	10	5	5	5	5	-	1	9	3	7	4	5	1	
	2%	2%	2%	10%	1%	-	1%	2%	1%	2%	3%	2%	3%	
				d										
Mean score	.3	.2	.3	.4	.3	.3	.4	.3	.3	.3	.5	.2	.5	
							g				k			
Standard deviation	.55	.53	.57	.79	.51	.56	.59	.54	.55	.55	.63	.46	.69	
Standard error	.02	.03	.04	.10	.03	.09	.06	.03	.04	.03	.05	.02	.15	

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

**QES Q4 2018****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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly (2)	21 4%	15 3%	6 11% a	3 18%	2 3%	6 6%	1 2%	1 1%	7 6%	-	1 1%	5 13% l	15 3%
Increased slightly (1)	98 19%	85 19%	13 25%	9 47%	10 14%	40 38% dghij	14 21% g	4 6%	14 11%	5 17%	4 10%	14 33% l	84 18%
Stayed the same (0)	376 74%	346 76% b	30 56%	5 29%	57 81% e	57 54%	52 77% e	52 91% e	95 79% e	24 79% e	34 89% e	21 50%	355 76% k
Decreased slightly (-1)	8 2%	6 1%	2 5% a	1 6%	1 2%	2 2%	-	-	3 2%	1 4%	-	1 3%	7 2%
Decreased significantly (-2)	4 1%	2 1%	1 3% a	-	* 1%	* *	-	1 2%	2 2%	-	-	* 1%	4 1%
<b>NETS</b>													
Net: Increased	119 24%	100 22%	19 37% a	12 65%	12 17%	45 43% dfghij	16 23% g	4 7%	21 17%	5 17%	4 11%	19 46% l	100 21%
Net: Decreased	12 2%	8 2%	4 7% a	1 6%	2 2%	3 3%	-	1 2%	5 4%	1 4%	-	1 4%	11 2%

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

**QES Q4 2018**

**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	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
Mean score	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Standard deviation	.2	.2	.4	.8	.2	.5	.2	*	.2	.1	.1	.6	.2
Standard error		a				dghij	g				l		
	.59	.55	.86	.84	.53	.66	.47	.43	.64	.44	.38	.80	.56
	.03	.03	.07	.22	.06	.07	.07	.06	.06	.06	.04	.12	.03

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



**QES Q4 2018**

**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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Increased significantly	(2) 21 4%	4 2%	17 7%	4 9%	13 3%	4 10%	6 9%	15 3%	10 5%	11 4%	15 11%	4 1%	2 8%
			a	d		d	g				k		
Increased slightly	(1) 98 19%	57 21%	41 17%	19 40%	70 17%	9 25%	18 29%	80 18%	37 19%	61 20%	48 35%	42 12%	9 37%
				d			g				k		
Stayed the same	(0) 376 74%	201 75%	175 73%	19 40%	333 79%	24 65%	37 60%	338 76%	147 74%	228 74%	68 51%	295 85%	12 51%
					c	c		f				j	
Decreased slightly	(-1) 8 2%	4 2%	4 2%	3 7%	5 1%	- -	* 1%	8 2%	3 1%	5 2%	3 2%	5 1%	1 3%
				d									
Decreased significantly	(-2) 4 1%	2 1%	2 1%	2 5%	2 *	- -	1 2%	3 1%	2 1%	2 1%	1 1%	2 1%	- -
				d									
<b>NETS</b>													
Net: Increased	119 24%	61 23%	58 24%	23 48%	84 20%	13 35%	24 38%	95 21%	47 24%	72 23%	62 46%	46 13%	11 45%
				d		d	g				k		
Net: Decreased	12 2%	6 2%	6 3%	5 11%	7 2%	- -	1 2%	11 2%	5 2%	7 2%	4 3%	7 2%	1 3%
				de									
Mean score	.2	.2	.3	.4 d	.2	.4 d	.4 g	.2	.3	.2	.5 k	.1	.5
Standard deviation	.59	.52	.65	.92 d	.53	.67 d	.74 g	.56	.61	.57	.76 k	.44	.71
Standard error	.03	.03	.04	.11 d	.03	.11 d	.07 g	.03	.04	.03	.06 k	.02	.15

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

**QES Q4 2018****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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Competition	178	158	20	3	24	29	32	18	37	16	17	9	168
	35%	35%	38%	17%	35%	27%	48%	32%	31%	55%	45%	23%	36%
					e	e			degh	e			
Inflation	141	126	15	7	26	28	18	15	33	4	10	12	129
	28%	28%	28%	37%	37%	26%	27%	27%	27%	14%	26%	28%	28%
					i								
Exchange rates	133	115	18	9	15	38	10	10	36	4	11	12	120
	26%	25%	33%	51%	21%	37%	15%	17%	30%	12%	29%	30%	26%
					dfgi				i		i		
Interest rates	104	93	11	1	26	25	13	6	22	7	5	8	96
	20%	20%	21%	4%	36%	23%	19%	11%	18%	23%	13%	18%	21%
					ghj								
Business rates	91	76	15	-	16	25	15	6	20	4	4	7	84
	18%	17%	28%	-	23%	24%	22%	11%	17%	14%	10%	18%	18%
			a		j	gj							
Corporate Taxation	78	68	10	-	10	17	20	5	21	2	3	4	73
	15%	15%	19%	-	14%	16%	29%	9%	17%	8%	8%	10%	16%
							gij						
None of the above	84	79	5	3	8	10	15	14	23	5	6	7	77
	17%	17%	9%	19%	11%	9%	23%	24%	20%	15%	16%	17%	16%
		b					e	de	e				

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

**QES Q4 2018****Q14. Which of the following are more of a concern to your business than they were three months ago?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not 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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Competition	178	88	90	15	146	16	23	155	67	110	55	110	12
	35%	33%	38%	33%	35%	44%	36%	35%	34%	36%	41%	32%	53%
Inflation	141	81	60	15	116	10	22	119	56	84	54	78	8
	28%	30%	25%	32%	27%	28%	35%	27%	28%	27%	40%	22%	36%
											k		
Exchange rates	133	77	56	13	104	16	22	110	41	92	47	76	10
	26%	29%	24%	29%	24%	43%	36%	25%	21%	30%	35%	22%	42%
						d	g			h	k		
Interest rates	104	51	53	10	81	12	16	88	45	59	29	63	11
	20%	19%	22%	22%	19%	34%	25%	20%	22%	19%	22%	18%	47%
						d							
Business rates	91	49	42	18	62	11	29	62	46	45	27	61	4
	18%	18%	17%	38%	15%	30%	47%	14%	23%	15%	20%	17%	16%
				d		d	g		i				
Corporate Taxation	78	45	32	11	61	6	15	62	26	51	30	43	5
	15%	17%	13%	24%	14%	16%	25%	14%	13%	17%	22%	12%	20%
				d			g				k		
None of the above	84	43	40	4	79	1	3	80	32	52	11	72	-
	17%	16%	17%	8%	19%	3%	5%	18%	16%	17%	9%	21%	-
				ce			f				j		

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

**QES Q4 2018****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	507	101	248	158	-1
	100%	20%	49%	31%	
Economic prospects for London	507	97	173	237	-3
	100%	19%	34%	47%	
UK economic growth	507	92	149	266	-3
	100%	18%	29%	52%	

**QES Q4 2018****Q15\_1. What do you expect to happen to the following economic indicators over the next twelve months?****UK economic growth**

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1) 92	81	11	1	15	20	13	10	25	4	3	9	82
	18%	18%	20%	4%	22%	19%	19%	18%	21%	12%	9%	22%	18%
					j				j				
Stay the same	(0) 149	127	22	4	26	35	20	22	24	6	12	13	136
	29%	28%	41%	22%	37%	34%	30%	38%	20%	20%	31%	32%	29%
			a		hi	h		hi					
Worsen	(-1) 266	246	20	13	29	49	34	25	71	20	23	19	247
	52%	54%	38%	73%	42%	47%	50%	44%	59%	68%	61%	46%	53%
		b							d	deg	d		
Mean score	-.3	-.4	-.2	-.7	-.2	-.3	-.3	-.3	-.4	-.6	-.5	-.2	-.4
			a		ij	ij		ij					
Standard deviation	.77	.77	.75	.56	.78	.77	.78	.75	.81	.71	.66	.80	.76
Standard error	.03	.04	.07	.15	.09	.08	.12	.10	.08	.10	.08	.12	.04

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

**QES Q4 2018****Q15\_1. What do you expect to happen to the following economic indicators over the next twelve months?****UK economic growth**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve (1)	92 18%	48 18%	44 18%	19 40% de	71 17% e	1 3%	11 18%	80 18%	35 17%	57 18%	33 24% k	58 17%	1 3%
Stay the same (0)	149 29%	66 25%	83 35% a	12 26% e	135 32% e	2 6%	24 38%	126 28%	78 39% i	71 23%	29 21%	119 34% j	1 5%
Worsen (-1)	266 52%	154 58% b	112 47%	16 33%	217 51% c	33 91% cd	28 44%	238 54%	86 43%	180 58% h	73 54%	172 49%	21 91%
Mean score	-.3	-.4	-.3	.1 de	-.3 e	-.9	-.3	-.4	-.3 i	-.4	-.3	-.3	-.9
Standard deviation	.77	.77	.76	.86	.75	.43	.75	.77	.74	.78	.84	.74	.43
Standard error	.03	.05	.05	.10	.04	.07	.07	.04	.05	.05	.07	.04	.09

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

**QES Q4 2018****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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1) 97	86	12	*	10	22	19	13	25	5	5	5	92
	19%	19%	22%	1%	14%	21%	28%	22%	20%	16%	12%	12%	20%
Stay the same	(0) 173	147	26	5	35	40	24	22	24	9	14	20	152
	34%	32%	48%	26%	50%	38%	36%	38%	20%	30%	38%	49%	33%
		a	a	hi	h	h	h	h	h	h	h	l	
Worsen	(-1) 237	221	16	13	25	43	25	23	72	16	19	16	221
	47%	49%	29%	73%	36%	41%	37%	39%	60%	54%	50%	39%	47%
		b	b	defg					defg				
Mean score	-.3	-.3	-.1	-.7	-.2	-.2	-.1	-.2	-.4	-.4	-.4	-.3	-.3
		a	a				hj						
Standard deviation	.76	.77	.72	.49	.68	.76	.80	.77	.81	.76	.70	.67	.77
Standard error	.03	.04	.06	.13	.08	.08	.12	.10	.08	.11	.08	.10	.04

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

**QES Q4 2018****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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve (1)	97 19%	57 21%	41 17%	18 39% de	78 18% e	1 3%	12 20%	85 19%	42 21%	56 18%	33 24%	64 18%	* 1%
Stay the same (0)	173 34%	71 27%	102 43% a	17 36% e	153 36% e	3 8%	25 40%	147 33%	83 42% i	90 29%	38 28%	130 37%	5 20%
Worsen (-1)	237 47%	140 52% b	97 40%	12 25%	193 45% c	33 89% cd	25 40%	212 48%	74 37%	163 53% h	64 47%	155 44%	18 79%
Mean score	-.3	-.3	-.2	.1 de	-.3 e	-.9	-.2	-.3	-.2 i	-.3	-.2	-.3	-.8
Standard deviation	.76	.80	.72	.79	.75	.45	.75	.77	.75	.77	.82	.75	.45
Standard error	.03	.05	.05	.10	.04	.07	.07	.04	.05	.05	.07	.04	.10

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



**QES Q4 2018****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

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Improve	(1) 101	84	17	8	8	24	18	7	25	6	5	12	89
	20%	19%	32%	44%	12%	23%	26%	12%	21%	21%	12%	29%	19%
			a				d						
Stay the same	(0) 248	220	27	6	41	52	32	35	44	18	20	23	225
	49%	48%	52%	33%	58%	49%	48%	61%	37%	59%	53%	56%	48%
					h		h		h	h	h		
Worsen	(-1) 158	150	9	4	21	29	18	16	51	6	13	7	152
	31%	33%	16%	23%	30%	28%	26%	27%	42%	20%	35%	16%	33%
		b							egi			k	k
Mean score	-.1	-.1	.2	.2	-.2	-.1	*	-.1	-.2	*	-.2	.1	-.1
			a									l	
Standard deviation	.71	.70	.68	.81	.62	.71	.73	.61	.77	.65	.66	.66	.71
Standard error	.03	.04	.06	.22	.07	.08	.11	.08	.07	.10	.08	.10	.03

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

**QES Q4 2018****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

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	507	287	220	68	402	37	102	405	224	283	139	346	22	
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Improve	(1)	101	60	41	26	74	1	20	81	46	55	47	53	2
		20%	22%	17%	56%	17%	3%	32%	18%	23%	18%	35%	15%	7%
					de	e		g				k		
Stay the same	(0)	248	120	128	19	223	5	27	221	109	139	51	195	1
		49%	45%	53%	41%	53%	14%	43%	50%	55%	45%	38%	56%	5%
					e	e				i			j	
Worsen	(-1)	158	88	70	1	127	30	16	143	44	114	37	101	20
		31%	33%	29%	3%	30%	82%	25%	32%	22%	37%	27%	29%	88%
						c	cd				h			
Mean score		-.1	-.1	-.1	.5	-.1	-.8	.1	-.1	*	-.2	.1	-.1	-.8
					de	e		g		i		k		
Standard deviation		.71	.74	.67	.56	.68	.49	.76	.70	.67	.72	.79	.65	.54
Standard error		.03	.04	.05	.07	.03	.08	.07	.03	.05	.04	.07	.03	.12

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

## QES Q4 2018

### 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
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Training existing staff	106	82	23	9	12	21	19	7	23	9	6	13	93
	21%	18%	44%	48%	17%	20%	29%	12%	19%	30%	16%	30%	20%
		a				g			g				
Employing new staff from the UK workforce	57	41	17	4	12	10	14	3	7	4	3	11	46
	11%	9%	31%	21%	17%	9%	21%	5%	5%	14%	9%	26%	10%
		a			gh		gh					l	
Employing new staff from the EU/EEA workforce, excluding the UK (e.g. Germany, Norway)	28	16	13	*	6	2	10	3	3	3	1	4	24
	6%	3%	24%	1%	9%	2%	14%	4%	2%	10%	4%	10%	5%
		a			h		ehj		eh				
Employing work experience students or interns	27	18	9	3	2	3	9	3	3	2	1	4	23
	5%	4%	17%	14%	3%	3%	14%	6%	3%	5%	4%	10%	5%
		a					deh						
Employing apprentice(s)	20	14	5	3	4	5	4	*	1	2	1	6	13
	4%	3%	10%	19%	6%	5%	5%	1%	1%	5%	2%	15%	3%
		a			h							l	
Employing new staff from outside the UK / EU / EEA (e.g. America, China)	15	10	5	1	5	1	3	1	1	1	1	5	10
	3%	2%	9%	6%	7%	1%	5%	2%	1%	4%	1%	12%	2%
		a			eh							l	

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

**QES Q4 2018****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	507	376	131	14	72	87	42	60	114	47	71	41	466
Weighted Total	507	454	53	18	70	105	67	58	120	30	38	42	465
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	349	335	13	5	48	77	35	45	95	17	28	18	330
	69%	74%	25%	26%	68%	73%	52%	77%	79%	55%	74%	44%	71%
		b				fi		fi	fi	fi	fi		k

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

## QES Q4 2018

**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	507	287	220	68	402	37	102	405	224	283	139	346	22
Weighted Total	507	268	239	47	423	37	63	444	199	308	135	349	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Training existing staff	106	59	47	17	83	6	27	79	52	54	29	76	1
	21%	22%	20%	35%	20%	17%	43%	18%	26%	17%	22%	22%	2%
				d			g		i				
Employing new staff from the UK workforce	57	37	20	26	26	5	40	17	32	25	27	28	2
	11%	14%	8%	55%	6%	13%	64%	4%	16%	8%	20%	8%	8%
		b		de			g		i		k		
Employing new staff from the EU/EEA workforce, excluding the UK (e.g. Germany, Norway)	28	20	9	10	16	3	19	10	18	11	12	16	1
	6%	7%	4%	22%	4%	7%	30%	2%	9%	3%	9%	5%	4%
				d			g		i				
Employing work experience students or interns	27	16	11	13	12	2	18	9	18	9	13	13	1
	5%	6%	5%	27%	3%	5%	29%	2%	9%	3%	9%	4%	6%
				de			g		i		k		
Employing apprentice(s)	20	10	10	5	12	2	12	7	10	10	11	7	1
	4%	4%	4%	12%	3%	5%	20%	2%	5%	3%	8%	2%	5%
				d			g				k		
Employing new staff from outside the UK / EU / EEA (e.g. America, China)	15	8	6	8	4	2	11	4	7	8	8	6	*
	3%	3%	3%	17%	1%	6%	17%	1%	3%	3%	6%	2%	2%
				d		d	g				k		
None of the above	349	175	174	10	314	25	8	341	115	233	81	249	19
	69%	65%	73%	21%	74%	68%	12%	77%	58%	76%	60%	71%	81%
				c	c	c	f		h		j		

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