

# LCCI – QES Q3 2014

## **METHODOLOGY NOTE**

ComRes interviewed 516 London business decision makers between 26<sup>th</sup> August and 22<sup>nd</sup> September 2014. 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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## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Summary table

Base: All respondents

	Total	In the last year	More than a year ago but no more than three years ago	More than three years ago	Never	Net
						Ever
Education and training for existing staff members	516 100%	83 16%	28 5%	76 15%	329 64%	187 36%
Research and product development (R&D)	516 100%	36 7%	28 5%	34 7%	418 81%	98 19%
Business advice and consultancy	516 100%	35 7%	43 8%	58 11%	381 74%	135 26%
Business incubation (facilities hosted by an HEI to support start-up and early-stage companies)	516 100%	9 2%	10 2%	32 6%	466 90%	50 10%
Technology and knowledge transfer (commercialisation of an HEI-generated innovation, e.g. through licensing a new software, material or process)	516 100%	13 3%	10 2%	39 8%	454 88%	62 12%
Knowledge Transfer Partnerships (a programme run by the Technology Strategy Board helping companies to employ academic institution associates to work on specific projects)	516 100%	10 2%	21 4%	19 4%	467 90%	49 10%

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1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

**Summary table**

Base: All respondents

	Total	In the last year	More than a year ago but no more than three years ago	More than three years ago	Never	Net
						Ever
Supplying products or services to HEIs	516 100%	27 5%	17 3%	34 7%	438 85%	78 15%
Student placements	516 100%	30 6%	24 5%	47 9%	415 80%	101 20%

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## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Education and training for existing staff members

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	83	62	21	21	62	5	18	12	3	15	9	9	11
	16%	13%	37%	33%	14%	26%	29%	11%	14%	8%	23%	29%	27%
More than a year ago but no more than three years ago	28	19	10	5	24	*	5	3	2	10	6	1	1
	5%	4%	17%	7%	5%	2%	8%	3%	9%	5%	14%	2%	3%
More than three years ago	76	70	6	12	64	2	9	17	4	30	4	5	4
	15%	15%	10%	18%	14%	13%	15%	15%	15%	16%	10%	18%	10%
Never	329	309	20	27	302	11	29	79	16	133	21	15	25
	64%	67%	36%	42%	67%	60%	47%	71%	62%	71%	52%	51%	61%
<b>Net</b>													
Ever	187	151	36	37	150	8	32	32	10	55	19	15	16
	36%	33%	64%	58%	33%	40%	53%	29%	38%	29%	48%	49%	39%

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## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Education and training for existing staff members

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	83	31	52	24	57	2	31	52	29	54	25	56	2	82	25	29
	16%	13%	19%	27%	15%	5%	25%	13%	19%	15%	22%	15%	8%	16%	22%	37%
More than a year ago but no more than three years ago	28	11	17	5	23	1	10	18	10	18	4	22	3	28	8	3
	5%	5%	6%	5%	6%	3%	9%	5%	7%	5%	3%	6%	13%	5%	7%	4%
More than three years ago	76	31	45	19	55	2	22	54	24	51	22	49	6	70	17	8
	15%	13%	17%	22%	14%	6%	18%	14%	16%	14%	19%	13%	25%	14%	15%	10%
Never	329	167	157	40	259	30	57	272	89	240	62	255	12	325	63	39
	64%	70%	58%	46%	66%	87%	48%	69%	58%	66%	55%	67%	54%	64%	56%	50%
<b>Net</b>																
Ever	187	73	114	47	135	5	63	124	64	123	50	126	10	180	49	40
	36%	30%	42%	54%	34%	13%	52%	31%	42%	34%	45%	33%	46%	36%	44%	50%



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## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Research and product development (R&amp;D)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	36	30	6	10	26	5	6	7	1	14	3	1	2
	7%	7%	12%	16%	6%	25%	9%	6%	3%	7%	7%	2%	4%
More than a year ago but no more than three years ago	28	19	9	5	23	2	4	4	2	11	2	1	2
	5%	4%	16%	9%	5%	13%	6%	4%	7%	6%	6%	2%	5%
More than three years ago	34	27	7	6	27	*	6	1	2	18	3	*	2
	7%	6%	12%	10%	6%	2%	10%	1%	7%	10%	8%	1%	5%
Never	418	384	34	42	376	12	45	99	21	145	32	29	35
	81%	83%	61%	66%	83%	61%	74%	89%	83%	77%	79%	95%	86%
<b>Net</b>													
Ever	98	76	22	22	76	7	16	12	4	42	9	1	6
	19%	17%	39%	34%	17%	39%	26%	11%	17%	23%	21%	5%	14%

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## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Research and product development (R&amp;D)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	36	15	22	5	27	4	16	20	9	27	15	22	-	36	15	12
	7%	6%	8%	6%	7%	13%	14%	5%	6%	7%	13%	6%	-	7%	13%	15%
More than a year ago but no more than three years ago	28	10	18	8	20	*	14	14	14	14	5	23	-	27	11	5
	5%	4%	7%	9%	5%	1%	12%	3%	9%	4%	4%	6%	-	5%	10%	7%
More than three years ago	34	17	16	13	20	1	7	26	8	25	13	19	2	30	17	3
	7%	7%	6%	15%	5%	3%	6%	7%	6%	7%	11%	5%	10%	6%	15%	4%
Never	418	198	215	61	327	29	82	336	122	296	81	317	20	411	70	58
	81%	83%	79%	70%	83%	84%	68%	85%	79%	82%	72%	83%	90%	81%	62%	74%
<b>Net</b>																
Ever	98	42	56	26	67	6	38	60	32	67	32	64	2	93	42	21
	19%	17%	21%	30%	17%	16%	32%	15%	21%	18%	28%	17%	10%	19%	38%	26%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

**Business advice and consultancy**

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	35	27	8	7	28	1	9	7	2	6	5	2	4
	7%	6%	14%	11%	6%	3%	15%	6%	7%	3%	12%	6%	10%
More than a year ago but no more than three years ago	43	34	9	5	37	3	3	8	2	19	3	1	4
	8%	7%	15%	9%	8%	13%	5%	7%	9%	10%	7%	2%	10%
More than three years ago	58	51	8	7	51	2	6	6	3	32	2	4	3
	11%	11%	13%	11%	11%	11%	9%	5%	11%	17%	5%	15%	8%
Never	381	349	32	45	336	14	44	91	18	131	31	23	29
	74%	76%	57%	70%	74%	72%	71%	81%	73%	70%	76%	77%	72%
<b>Net</b>													
Ever	135	111	24	19	116	5	18	21	7	56	10	7	11
	26%	24%	43%	30%	26%	28%	29%	19%	27%	30%	24%	23%	28%

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## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Business advice and consultancy

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	35	18	16	12	23	*	13	21	11	23	13	21	1	29	16	13
	7%	8%	6%	14%	6%	1%	11%	5%	7%	6%	12%	5%	2%	6%	14%	16%
More than a year ago but no more than three years ago	43	23	20	11	23	9	15	27	15	28	9	33	*	42	19	13
	8%	9%	7%	12%	6%	25%	13%	7%	10%	8%	8%	9%	1%	8%	17%	16%
More than three years ago	58	23	36	13	44	1	12	46	16	42	16	42	1	58	20	7
	11%	9%	13%	15%	11%	3%	10%	12%	10%	12%	14%	11%	4%	12%	18%	9%
Never	381	176	199	52	304	25	79	302	111	269	74	286	20	375	58	46
	74%	73%	74%	60%	77%	72%	66%	76%	73%	74%	66%	75%	93%	74%	52%	59%
<b>Net</b>																
Ever	135	64	72	35	90	10	41	94	42	94	38	95	2	130	54	32
	26%	27%	26%	40%	23%	28%	34%	24%	27%	26%	34%	25%	7%	26%	48%	41%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Business incubation (facilities hosted by an HEI to support start-up and early-stage companies)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	9	6	3	*	9	-	*	3	1	4	*	*	*
	2%	1%	4%	*	2%	-	*	3%	2%	2%	1%	*	1%
More than a year ago but no more than three years ago	10	6	4	1	8	1	1	2	2	1	2	*	1
	2%	1%	7%	2%	2%	3%	1%	2%	7%	1%	4%	1%	2%
More than three years ago	32	23	9	5	27	2	3	3	2	19	2	1	*
	6%	5%	16%	8%	6%	12%	4%	2%	6%	10%	5%	4%	1%
Never	466	425	41	57	408	16	58	103	21	163	36	29	39
	90%	92%	72%	90%	90%	85%	94%	92%	84%	87%	90%	95%	96%
<b>Net</b>													
Ever	50	35	16	7	44	3	4	8	4	24	4	1	1
	10%	8%	28%	10%	10%	15%	6%	8%	16%	13%	10%	5%	4%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Business incubation (facilities hosted by an HEI to support start-up and early-stage companies)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	9	7	2	7	2	-	8	1	7	2	7	2	*	8	4	2
	2%	3%	1%	8%	*	-	6%	*	4%	1%	6%	*	1%	2%	4%	3%
More than a year ago but no more than three years ago	10	7	3	4	5	-	6	4	6	4	3	6	-	9	6	3
	2%	3%	1%	5%	1%	-	5%	1%	4%	1%	3%	2%	-	2%	5%	4%
More than three years ago	32	12	19	9	18	5	10	22	14	18	16	15	1	32	12	8
	6%	5%	7%	10%	5%	14%	9%	5%	9%	5%	14%	4%	3%	6%	10%	10%
Never	466	213	247	67	369	30	96	369	127	339	86	358	21	456	90	66
	90%	89%	91%	77%	94%	86%	80%	93%	83%	93%	77%	94%	96%	90%	81%	84%
<b>Net</b>																
Ever	50	26	24	20	25	5	24	27	26	24	26	23	1	49	22	13
	10%	11%	9%	23%	6%	14%	20%	7%	17%	7%	23%	6%	4%	10%	19%	16%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Technology and knowledge transfer (commercialisation of an HEI-generated innovation, e.g. through licensing a new software, material or process)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	13	8	5	4	9	2	2	2	1	*	3	*	1
	3%	2%	9%	7%	2%	13%	3%	2%	3%	*	9%	2%	3%
More than a year ago but no more than three years ago	10	4	6	2	8	*	2	1	2	2	2	1	*
	2%	1%	11%	3%	2%	2%	2%	1%	8%	1%	5%	3%	1%
More than three years ago	39	33	6	12	27	3	10	5	2	18	1	*	1
	8%	7%	11%	19%	6%	13%	16%	5%	6%	10%	2%	*	3%
Never	454	415	39	46	409	14	48	103	21	168	34	29	38
	88%	90%	69%	71%	90%	72%	78%	92%	83%	89%	85%	95%	93%
<b>Net</b>													
Ever	62	44	17	19	43	5	14	9	4	20	6	1	3
	12%	10%	31%	29%	10%	28%	22%	8%	17%	11%	15%	5%	7%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Technology and knowledge transfer (commercialisation of an HEI-generated innovation, e.g. through licensing a new software, material or process)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	13	7	6	5	8	*	7	6	9	4	5	8	1	13	6	4
	3%	3%	2%	5%	2%	1%	6%	1%	6%	1%	4%	2%	2%	3%	5%	5%
More than a year ago but no more than three years ago	10	5	4	5	4	*	7	3	7	3	4	5	1	9	7	4
	2%	2%	2%	6%	1%	*	6%	1%	4%	1%	4%	1%	4%	2%	6%	5%
More than three years ago	39	13	26	9	31	-	9	30	14	25	15	23	1	39	9	2
	8%	5%	10%	10%	8%	-	8%	8%	9%	7%	14%	6%	3%	8%	8%	3%
Never	454	214	235	69	351	34	97	357	123	331	89	345	20	443	90	69
	88%	89%	87%	79%	89%	99%	81%	90%	81%	91%	79%	91%	91%	88%	81%	88%
<b>Net</b>																
Ever	62	26	36	18	43	*	23	39	30	32	24	36	2	61	22	10
	12%	11%	13%	21%	11%	1%	19%	10%	19%	9%	21%	9%	9%	12%	19%	12%



## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

**Knowledge Transfer Partnerships (a programme run by the Technology Strategy Board helping companies to employ academic institution associates to work on specific projects)**

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	10	6	4	1	9	*	1	1	1	5	3	*	-
	2%	1%	7%	1%	2%	*	1%	*	2%	2%	6%	2%	-
More than a year ago but no more than three years ago	21	14	7	6	15	3	4	4	2	8	1	1	*
	4%	3%	12%	10%	3%	14%	6%	3%	7%	4%	2%	2%	*
More than three years ago	19	15	4	5	14	*	5	2	1	10	1	*	*
	4%	3%	8%	7%	3%	1%	7%	2%	4%	6%	2%	*	*
Never	467	425	41	52	414	16	52	105	22	165	36	29	41
	90%	92%	73%	82%	92%	85%	85%	94%	88%	88%	90%	96%	100%
<b>Net</b>													
Ever	49	35	15	12	38	3	9	6	3	23	4	1	*
	10%	8%	27%	18%	8%	15%	15%	6%	12%	12%	10%	4%	*

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

**Knowledge Transfer Partnerships (a programme run by the Technology Strategy Board helping companies to employ academic institution associates to work on specific projects)**

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	10	8	2	7	3	-	7	3	7	3	6	4	-	10	4	3
	2%	3%	1%	8%	1%	-	6%	1%	5%	1%	5%	1%	-	2%	3%	4%
More than a year ago but no more than three years ago	21	10	11	11	10	-	12	9	13	8	5	16	*	20	8	4
	4%	4%	4%	12%	3%	-	10%	2%	8%	2%	4%	4%	1%	4%	7%	5%
More than three years ago	19	6	13	4	14	1	4	15	8	11	15	3	1	19	8	2
	4%	2%	5%	4%	3%	4%	3%	4%	5%	3%	13%	1%	4%	4%	7%	2%
Never	467	215	246	66	367	33	98	368	125	341	88	358	21	456	92	70
	90%	90%	91%	76%	93%	96%	82%	93%	82%	94%	78%	94%	95%	90%	82%	89%
<b>Net</b>																
Ever	49	24	25	21	27	1	22	28	28	22	25	23	1	49	20	8
	10%	10%	9%	24%	7%	4%	18%	7%	18%	6%	22%	6%	5%	10%	18%	11%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Supplying products or services to HEIs

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	27	22	5	8	19	2	6	3	1	4	3	5	2
	5%	5%	9%	12%	4%	12%	9%	2%	6%	2%	8%	18%	6%
More than a year ago but no more than three years ago	17	9	8	4	14	*	3	3	2	6	2	*	*
	3%	2%	15%	6%	3%	2%	6%	2%	9%	3%	6%	1%	*
More than three years ago	34	29	5	3	31	2	2	2	2	23	1	2	*
	7%	6%	9%	4%	7%	13%	3%	1%	6%	12%	3%	6%	1%
Never	438	400	38	50	388	14	51	105	20	155	33	22	38
	85%	87%	68%	78%	86%	74%	82%	94%	79%	83%	83%	75%	93%
<b>Net</b>													
Ever	78	60	18	14	64	5	11	7	5	33	7	8	3
	15%	13%	32%	22%	14%	26%	18%	6%	21%	17%	17%	25%	7%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Supplying products or services to HEIs

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	27	12	10	4	23	*	5	22	9	17	5	18	4	27	8	3
	5%	5%	4%	4%	6%	*	4%	5%	6%	5%	4%	5%	20%	5%	7%	4%
More than a year ago but no more than three years ago	17	8	9	6	11	*	9	8	14	3	9	8	*	16	7	5
	3%	3%	3%	7%	3%	*	7%	2%	9%	1%	8%	2%	1%	3%	6%	6%
More than three years ago	34	11	23	3	25	6	3	31	5	28	11	22	1	34	14	7
	7%	5%	8%	4%	6%	16%	3%	8%	4%	8%	10%	6%	3%	7%	12%	9%
Never	438	208	229	73	336	29	103	335	124	314	88	334	17	428	83	63
	85%	87%	85%	84%	85%	83%	86%	85%	81%	86%	78%	88%	76%	85%	74%	81%
<b>Net</b>																
Ever	78	31	42	14	58	6	17	61	29	49	25	48	5	76	29	15
	15%	13%	15%	16%	15%	17%	14%	15%	19%	14%	22%	12%	24%	15%	26%	19%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Student placements

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	30	15	15	8	22	2	6	3	3	9	3	2	2
	6%	3%	26%	12%	5%	11%	10%	3%	11%	5%	6%	8%	6%
More than a year ago but no more than three years ago	24	18	6	5	20	3	2	5	1	4	2	5	2
	5%	4%	11%	7%	4%	15%	3%	5%	5%	2%	4%	17%	5%
More than three years ago	47	37	10	6	41	3	5	10	2	19	4	1	2
	9%	8%	18%	9%	9%	14%	8%	9%	10%	10%	11%	5%	5%
Never	415	390	25	46	369	11	49	93	19	156	32	21	34
	80%	85%	45%	72%	82%	60%	79%	83%	75%	83%	79%	71%	84%
<b>Net</b>													
Ever	101	70	31	18	83	8	13	18	6	32	9	9	6
	20%	15%	55%	28%	18%	40%	21%	17%	25%	17%	21%	29%	16%

## QES Q3 2014

## 1. How recently, if at all, has your business used each of the following services provided by a higher education institution (HEI), e.g. a university?

## Student placements

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	30	20	10	10	19	2	17	13	12	18	6	24	-	30	11	9
	6%	8%	4%	11%	5%	4%	14%	3%	8%	5%	5%	6%	-	6%	10%	12%
More than a year ago but no more than three years ago	24	14	10	8	16	*	10	14	13	11	4	19	1	24	7	5
	5%	6%	4%	10%	4%	1%	9%	4%	8%	3%	3%	5%	6%	5%	6%	6%
More than three years ago	47	25	21	10	33	3	15	32	18	29	17	29	1	46	17	10
	9%	11%	8%	12%	8%	9%	12%	8%	12%	8%	15%	8%	5%	9%	16%	13%
Never	415	180	230	59	326	30	78	337	110	305	86	309	20	405	76	54
	80%	75%	85%	68%	83%	85%	65%	85%	72%	84%	77%	81%	88%	80%	68%	69%
<b>Net</b>																
Ever	101	60	41	28	68	5	42	59	43	58	26	72	3	100	36	24
	20%	25%	15%	32%	17%	15%	35%	15%	28%	16%	23%	19%	12%	20%	32%	31%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Summary table

Base: All who do not use each service

	Total	Cost	Not relevant	Not good enough quality	Not available in my business's area	Unaware that HEIs provided this	None of the above
Education and training for existing staff members	329 100%	28 9%	197 60%	4 1%	19 6%	51 16%	44 13%
Research and product development (R&D)	418 100%	23 5%	261 62%	5 1%	27 6%	54 13%	56 13%
Business advice and consultancy	381 100%	37 10%	223 59%	11 3%	20 5%	58 15%	50 13%
Business incubation	466 100%	23 5%	307 66%	9 2%	15 3%	70 15%	58 12%
Technology and knowledge transfer	454 100%	28 6%	276 61%	6 1%	25 6%	78 17%	61 13%
Knowledge Transfer Partnerships	467 100%	15 3%	295 63%	6 1%	18 4%	82 18%	70 15%
Supplying products or services to HEIs	438 100%	16 4%	274 62%	5 1%	23 5%	72 16%	63 14%
Student placements	415 100%	21 5%	291 70%	15 4%	19 5%	42 10%	51 12%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Education and training for existing staff members

Base: All who do not use education and training for existing staff members

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	252	178	74	16	236	11	27	44	30	52	50	10	28
Weighted Total	329	309	20	27	302	11	29	79	16	133	21	15	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	197	189	8	10	187	5	14	46	7	83	13	8	21
	60%	61%	38%	37%	62%	40%	48%	57%	47%	63%	60%	54%	87%
Unaware that HEIs provided this	51	44	7	8	43	3	8	9	4	24	2	-	1
	16%	14%	37%	30%	14%	22%	27%	12%	27%	18%	11%	-	4%
Cost	28	28	1	2	26	2	1	2	2	16	4	-	1
	9%	9%	4%	8%	9%	19%	3%	2%	14%	12%	18%	-	5%
Not available in my business's area	19	18	*	2	16	2	1	6	-	8	1	-	-
	6%	6%	2%	8%	5%	19%	3%	8%	-	6%	4%	-	-
Not good enough quality	4	4	*	-	4	-	-	-	-	4	*	-	-
	1%	1%	1%	-	1%	-	-	-	-	3%	1%	-	-
None of the above	44	40	4	5	39	*	7	16	2	10	1	7	1
	13%	13%	20%	17%	13%	1%	22%	20%	11%	7%	6%	46%	6%



## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Education and training for existing staff members

Base: All who do not use education and training for existing staff members

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	252	138	112	41	190	21	65	187	90	162	49	189	14	247	66	52
Weighted Total	329	167	157	40	259	30	57	272	89	240	62	255	12	325	63	39
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	197	86	106	11	169	16	23	173	46	150	39	148	10	194	29	24
	60%	52%	68%	29%	65%	52%	41%	64%	52%	63%	63%	58%	81%	60%	45%	62%
Unaware that HEIs provided this	51	32	19	15	30	6	24	28	17	34	8	42	1	51	19	11
	16%	19%	12%	38%	11%	21%	41%	10%	19%	14%	13%	17%	7%	16%	30%	29%
Cost	28	14	14	3	17	9	5	23	3	25	13	15	-	27	14	9
	9%	8%	9%	7%	6%	29%	9%	9%	3%	11%	21%	6%	-	8%	22%	22%
Not available in my business's area	19	12	7	5	9	5	15	4	12	7	8	10	-	19	7	5
	6%	7%	4%	12%	3%	16%	26%	1%	13%	3%	13%	4%	-	6%	10%	12%
Not good enough quality	4	4	-	*	4	-	*	4	-	4	-	4	-	4	*	-
	1%	3%	-	*	2%	-	*	2%	-	2%	-	2%	-	1%	*	-
None of the above	44	20	23	6	31	7	3	40	12	32	6	36	1	44	8	3
	13%	12%	15%	14%	12%	23%	6%	15%	13%	13%	10%	14%	11%	13%	12%	8%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Research and product development (R&amp;D)

Base: All who do not use research and product development (R&amp;D)

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	351	234	117	22	329	11	35	62	42	60	78	21	42
Weighted Total	418	384	34	42	376	12	45	99	21	145	32	29	35
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	261	243	18	19	241	5	24	48	13	103	25	19	25
	62%	63%	51%	46%	64%	44%	52%	49%	61%	71%	77%	66%	71%
Unaware that HEIs provided this	54	45	9	13	41	2	12	10	2	21	2	1	4
	13%	12%	27%	30%	11%	18%	26%	10%	11%	14%	7%	2%	11%
Not available in my business's area	27	26	1	4	22	-	6	10	1	4	1	1	2
	6%	7%	3%	11%	6%	-	13%	10%	7%	3%	4%	5%	6%
Cost	23	21	1	5	17	4	2	5	2	8	1	1	-
	5%	6%	4%	12%	5%	36%	4%	5%	10%	5%	4%	4%	-
Not good enough quality	5	4	*	-	5	-	-	-	*	4	*	-	-
	1%	1%	1%	-	1%	-	-	-	*	3%	1%	-	-
None of the above	56	51	5	*	56	*	3	26	3	9	2	8	4
	13%	13%	14%	1%	15%	1%	7%	26%	14%	6%	8%	27%	12%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Research and product development (R&amp;D)

Base: All who do not use research and product development (R&amp;D)

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	351	189	160	69	254	28	102	249	127	224	70	261	20	343	97	84
Weighted Total	418	198	215	61	327	29	82	336	122	296	81	317	20	411	70	58
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	261	114	143	29	219	12	41	220	63	198	51	197	13	258	38	36
	62%	58%	66%	48%	67%	42%	50%	65%	52%	67%	63%	62%	66%	63%	55%	62%
Unaware that HEIs provided this	54	36	18	17	31	6	23	31	21	33	12	42	*	53	14	13
	13%	18%	9%	28%	10%	19%	28%	9%	18%	11%	15%	13%	1%	13%	20%	23%
Not available in my business's area	27	10	16	5	17	4	6	20	8	19	10	11	5	27	2	1
	6%	5%	7%	9%	5%	13%	8%	6%	6%	6%	13%	3%	26%	6%	3%	2%
Cost	23	9	14	3	15	4	1	22	6	17	8	14	1	22	8	4
	5%	4%	7%	5%	5%	15%	1%	7%	5%	6%	10%	4%	3%	5%	12%	7%
Not good enough quality	5	5	-	*	4	-	*	4	*	4	*	5	-	5	*	*
	1%	2%	-	*	1%	-	*	1%	*	2%	*	1%	-	1%	1%	*
None of the above	56	30	25	6	42	7	11	45	24	32	4	50	1	54	11	7
	13%	15%	11%	11%	13%	24%	13%	13%	20%	11%	5%	16%	7%	13%	16%	12%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

**Business advice and consultancy**

Base: All who do not use business advice and consultancy

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	321	212	109	23	298	12	32	56	35	55	78	16	37
Weighted Total	381	349	32	45	336	14	44	91	18	131	31	23	29
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	223	210	14	19	204	5	20	57	10	81	19	14	18
	59%	60%	43%	43%	61%	35%	46%	62%	57%	61%	63%	59%	61%
Unaware that HEIs provided this	58	49	10	15	43	4	13	10	2	21	4	-	3
	15%	14%	30%	33%	13%	31%	31%	11%	12%	16%	14%	-	11%
Cost	37	35	3	2	35	2	2	8	1	17	2	2	3
	10%	10%	8%	5%	10%	18%	4%	9%	7%	13%	7%	7%	11%
Not available in my business's area	20	20	*	2	18	2	1	1	1	13	1	1	1
	5%	6%	1%	5%	5%	15%	2%	1%	7%	10%	2%	5%	3%
Not good enough quality	11	10	1	-	11	-	-	*	1	8	1	-	-
	3%	3%	3%	-	3%	-	-	*	4%	6%	5%	-	-
None of the above	50	45	5	6	44	*	8	15	3	8	3	8	4
	13%	13%	16%	14%	13%	1%	19%	17%	16%	6%	10%	34%	15%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Business advice and consultancy

Base: All who do not use business advice and consultancy

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	321	173	146	58	236	27	93	228	120	201	66	234	21	314	92	77
Weighted Total	381	176	199	52	304	25	79	302	111	269	74	286	20	375	58	46
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	223	91	128	24	182	17	43	180	62	162	47	171	6	221	32	30
	59%	52%	64%	47%	60%	68%	55%	60%	56%	60%	63%	60%	27%	59%	55%	66%
Unaware that HEIs provided this	58	35	24	15	37	6	25	33	21	37	13	44	1	58	15	12
	15%	20%	12%	28%	12%	26%	32%	11%	19%	14%	17%	16%	7%	16%	26%	26%
Cost	37	11	26	2	28	7	8	29	3	34	10	19	8	34	8	6
	10%	6%	13%	4%	9%	26%	10%	10%	3%	13%	14%	7%	41%	9%	14%	14%
Not available in my business's area	20	11	9	4	10	6	9	11	7	13	8	11	1	20	7	4
	5%	6%	5%	8%	3%	22%	12%	4%	6%	5%	11%	4%	3%	5%	11%	10%
Not good enough quality	11	6	5	1	6	4	5	5	*	11	4	6	1	11	5	5
	3%	3%	2%	2%	2%	18%	7%	2%	*	4%	6%	2%	4%	3%	8%	10%
None of the above	50	24	25	6	43	2	5	44	20	30	9	37	4	48	9	5
	13%	14%	13%	11%	14%	6%	7%	15%	18%	11%	12%	13%	19%	13%	15%	11%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

**Business incubation**

Base: All who do not use business incubation

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	412	254	158	31	381	15	45	68	48	68	94	23	51
Weighted Total	466	425	41	57	408	16	58	103	21	163	36	29	39
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	307	285	22	29	278	10	30	62	13	117	29	20	27
	66%	67%	54%	51%	68%	60%	52%	60%	60%	72%	80%	70%	68%
Unaware that HEIs provided this	70	59	11	20	50	4	18	16	4	21	3	1	4
	15%	14%	28%	35%	12%	26%	31%	15%	19%	13%	7%	2%	11%
Cost	23	22	1	7	16	2	5	5	*	8	2	1	-
	5%	5%	2%	11%	4%	13%	10%	4%	*	5%	5%	4%	-
Not available in my business's area	15	13	2	*	14	*	1	1	2	5	2	*	4
	3%	3%	5%	*	4%	*	1%	1%	10%	3%	5%	*	11%
Not good enough quality	9	8	1	-	9	-	-	-	*	8	*	-	-
	2%	2%	2%	-	2%	-	-	-	1%	5%	1%	-	-
None of the above	58	53	4	1	56	*	4	20	3	17	2	8	4
	12%	13%	11%	2%	14%	1%	7%	19%	14%	10%	5%	27%	10%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

**Business incubation**

Base: All who do not use business incubation

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	412	225	185	86	291	35	128	284	151	261	89	299	24	404	133	113
Weighted Total	466	213	247	67	369	30	96	369	127	339	86	358	21	456	90	66
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	307	120	183	35	249	23	53	255	75	232	59	235	13	300	62	45
	66%	56%	74%	52%	68%	78%	55%	69%	59%	68%	69%	66%	60%	66%	68%	69%
Unaware that HEIs provided this	70	45	25	18	46	7	30	41	18	52	22	48	*	69	16	17
	15%	21%	10%	27%	12%	22%	31%	11%	14%	15%	26%	13%	1%	15%	18%	26%
Cost	23	6	17	2	16	4	4	19	5	18	8	11	4	23	5	5
	5%	3%	7%	4%	4%	15%	5%	5%	4%	5%	10%	3%	17%	5%	6%	8%
Not available in my business's area	15	7	8	2	6	7	7	8	5	10	6	7	2	14	6	5
	3%	3%	3%	3%	2%	22%	7%	2%	4%	3%	7%	2%	8%	3%	7%	7%
Not good enough quality	9	5	4	*	8	*	1	8	*	9	*	9	-	9	*	*
	2%	2%	2%	1%	2%	*	1%	2%	*	3%	*	2%	-	2%	1%	*
None of the above	58	33	23	9	47	1	15	43	24	33	4	50	3	56	14	6
	12%	16%	9%	14%	13%	4%	16%	12%	19%	10%	5%	14%	14%	12%	15%	10%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Technology and knowledge transfer

Base: All who do not use technology and knowledge transfer

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	387	247	140	27	360	13	41	66	43	69	87	22	46
Weighted Total	454	415	39	46	409	14	48	103	21	168	34	29	38
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	276	256	21	27	249	7	29	53	13	109	22	20	24
	61%	62%	53%	59%	61%	53%	61%	51%	60%	65%	65%	70%	62%
Unaware that HEIs provided this	78	69	10	15	63	4	12	14	3	34	4	2	5
	17%	16%	25%	33%	15%	31%	26%	13%	15%	20%	12%	6%	13%
Cost	28	26	2	3	25	2	3	5	1	12	2	1	2
	6%	6%	5%	7%	6%	15%	6%	5%	7%	7%	5%	4%	6%
Not available in my business's area	25	24	1	*	25	*	1	7	-	12	2	*	3
	6%	6%	3%	*	6%	*	2%	6%	-	7%	7%	1%	8%
Not good enough quality	6	4	2	*	5	-	*	-	*	5	*	-	-
	1%	1%	4%	1%	1%	-	1%	-	*	3%	*	-	-
None of the above	61	58	4	*	61	*	3	26	4	12	4	8	4
	13%	14%	9%	*	15%	1%	7%	25%	18%	7%	12%	27%	11%



## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Technology and knowledge transfer

Base: All who do not use technology and knowledge transfer

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	387	206	179	77	276	34	113	274	138	249	81	283	23	378	121	102
Weighted Total	454	214	235	69	351	34	97	357	123	331	89	345	20	443	90	69
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	276	112	160	29	230	17	53	223	69	207	58	202	16	273	46	45
	61%	52%	68%	42%	65%	51%	55%	62%	56%	63%	65%	58%	82%	62%	50%	66%
Unaware that HEIs provided this	78	48	30	25	43	10	32	46	15	64	22	56	*	73	31	17
	17%	23%	13%	37%	12%	29%	33%	13%	12%	19%	25%	16%	1%	16%	34%	25%
Cost	28	10	18	3	18	7	4	24	6	22	10	17	1	28	11	5
	6%	5%	8%	4%	5%	20%	5%	7%	5%	7%	11%	5%	5%	6%	12%	8%
Not available in my business's area	25	13	13	6	15	5	9	16	8	17	9	16	*	25	5	9
	6%	6%	5%	8%	4%	14%	10%	5%	6%	5%	10%	5%	*	6%	5%	13%
Not good enough quality	6	6	*	*	5	1	1	5	*	5	*	5	1	6	1	*
	1%	3%	*	1%	1%	2%	1%	1%	*	2%	*	1%	5%	1%	1%	1%
None of the above	61	31	29	6	49	7	11	51	26	36	5	55	1	59	9	8
	13%	14%	12%	8%	14%	20%	11%	14%	21%	11%	5%	16%	7%	13%	10%	11%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Knowledge Transfer Partnerships

Base: All who do not use Knowledge Transfer Partnerships

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	413	258	155	30	383	15	45	67	49	68	91	23	55
Weighted Total	467	425	41	52	414	16	52	105	22	165	36	29	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	295	275	20	24	271	9	27	62	14	113	23	19	28
	63%	65%	48%	46%	65%	58%	51%	59%	63%	68%	64%	66%	68%
Unaware that HEIs provided this	82	71	11	22	60	7	16	15	4	29	5	2	4
	18%	17%	27%	42%	14%	41%	31%	14%	16%	18%	15%	6%	11%
Not available in my business's area	18	16	2	2	15	2	1	1	1	5	3	-	4
	4%	4%	5%	4%	4%	13%	2%	1%	6%	3%	8%	-	10%
Cost	15	13	2	7	8	2	6	1	*	4	1	*	*
	3%	3%	4%	14%	2%	13%	12%	1%	*	3%	3%	1%	*
Not good enough quality	6	4	2	-	6	-	*	-	*	6	*	-	*
	1%	1%	5%	-	1%	-	*	-	*	3%	1%	-	*
None of the above	70	65	5	1	69	*	3	27	4	20	4	8	4
	15%	15%	12%	2%	17%	1%	6%	25%	17%	12%	10%	27%	11%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Knowledge Transfer Partnerships

Base: All who do not use Knowledge Transfer Partnerships

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	413	223	188	83	297	33	126	287	146	267	93	297	23	404	130	109
Weighted Total	467	215	246	66	367	33	98	368	125	341	88	358	21	456	92	70
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	295	121	170	38	239	18	52	242	72	223	56	222	17	287	58	44
	63%	56%	69%	58%	65%	54%	53%	66%	57%	65%	63%	62%	80%	63%	63%	63%
Unaware that HEIs provided this	82	44	37	17	55	10	33	49	22	60	27	54	*	81	22	21
	18%	21%	15%	26%	15%	29%	34%	13%	17%	18%	31%	15%	1%	18%	24%	30%
Not available in my business's area	18	8	9	3	8	7	7	10	6	12	6	10	1	17	9	6
	4%	4%	4%	4%	2%	20%	7%	3%	4%	3%	7%	3%	5%	4%	10%	8%
Cost	15	3	12	2	8	4	4	11	1	14	7	8	-	15	6	5
	3%	1%	5%	4%	2%	13%	4%	3%	1%	4%	8%	2%	-	3%	6%	7%
Not good enough quality	6	6	*	*	6	*	2	4	2	5	*	6	-	6	1	*
	1%	3%	*	1%	2%	*	2%	1%	1%	1%	*	2%	-	1%	1%	*
None of the above	70	35	34	5	58	7	12	58	25	45	4	63	3	68	15	7
	15%	16%	14%	8%	16%	21%	12%	16%	20%	13%	5%	17%	14%	15%	16%	10%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Supplying products or services to HEIs

Base: All who do not use supplying products or services to HEIs

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	379	240	139	28	351	14	42	69	42	67	79	17	49
Weighted Total	438	400	38	50	388	14	51	105	20	155	33	22	38
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	274	255	19	22	251	7	25	54	11	112	24	14	27
	62%	64%	49%	45%	65%	52%	49%	51%	57%	72%	72%	62%	70%
Unaware that HEIs provided this	72	61	11	20	52	5	17	16	4	24	2	1	3
	16%	15%	28%	40%	13%	32%	34%	15%	20%	16%	7%	3%	8%
Not available in my business's area	23	20	2	*	22	*	1	7	1	5	4	*	4
	5%	5%	6%	*	6%	*	2%	6%	7%	3%	12%	1%	11%
Cost	16	15	1	7	9	2	5	2	1	4	1	-	-
	4%	4%	3%	13%	2%	15%	11%	2%	4%	3%	3%	-	-
Not good enough quality	5	4	1	-	5	-	-	*	*	5	*	-	-
	1%	1%	3%	-	1%	-	-	*	*	3%	*	-	-
None of the above	63	58	5	1	62	*	3	26	3	16	2	8	4
	14%	15%	12%	2%	16%	1%	7%	25%	15%	11%	6%	34%	11%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Supplying products or services to HEIs

Base: All who do not use supplying products or services to HEIs

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	379	203	175	78	269	32	115	264	143	236	84	272	23	371	113	98
Weighted Total	438	208	229	73	336	29	103	335	124	314	88	334	17	428	83	63
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	274	118	156	40	217	17	57	217	66	208	56	206	12	268	56	41
	62%	57%	68%	55%	64%	58%	56%	65%	53%	66%	64%	62%	71%	63%	68%	65%
Unaware that HEIs provided this	72	43	29	18	48	6	31	41	23	49	22	50	*	71	16	17
	16%	21%	13%	25%	14%	20%	30%	12%	19%	15%	25%	15%	1%	17%	20%	27%
Not available in my business's area	23	8	15	3	13	7	7	15	6	17	7	15	1	22	8	6
	5%	4%	6%	4%	4%	23%	7%	5%	5%	5%	7%	4%	6%	5%	9%	10%
Cost	16	2	14	2	9	5	4	12	2	14	9	7	-	15	6	5
	4%	1%	6%	3%	3%	16%	4%	3%	1%	5%	10%	2%	-	3%	7%	8%
Not good enough quality	5	5	*	*	4	1	*	5	*	5	*	4	1	5	1	*
	1%	2%	*	1%	1%	3%	*	1%	*	2%	*	1%	4%	1%	1%	1%
None of the above	63	33	29	9	46	7	15	48	28	34	8	52	3	61	9	6
	14%	16%	13%	13%	14%	24%	14%	14%	23%	11%	9%	16%	18%	14%	11%	10%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Student placements

Base: All who do not use student placements

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	319	232	87	21	298	10	35	57	35	59	71	12	40
Weighted Total	415	390	25	46	369	11	49	93	19	156	32	21	34
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	291	281	10	24	267	5	29	59	13	120	24	17	25
	70%	72%	39%	51%	72%	43%	59%	63%	71%	77%	74%	80%	72%
Unaware that HEIs provided this	42	37	4	13	29	4	9	10	2	14	*	-	2
	10%	10%	17%	29%	8%	37%	18%	11%	9%	9%	1%	-	6%
Cost	21	18	3	3	18	2	3	1	-	10	2	1	1
	5%	4%	12%	7%	5%	19%	5%	2%	-	7%	7%	5%	3%
Not available in my business's area	19	17	2	1	18	*	2	6	1	5	2	-	3
	5%	4%	9%	2%	5%	1%	4%	7%	4%	3%	7%	-	8%
Not good enough quality	15	13	2	1	15	-	1	*	*	13	1	-	*
	4%	3%	8%	2%	4%	-	2%	*	*	8%	3%	-	*
None of the above	51	47	4	4	47	*	7	17	4	14	2	4	4
	12%	12%	15%	10%	13%	*	13%	18%	20%	9%	7%	20%	11%

## QES Q3 2014

## 2. Which of the following reasons, if any, explain why your business has not used each of the following HEI services?

## Student placements

Base: All who do not use student placements

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	319	163	154	52	242	25	72	247	110	209	67	231	21	311	79	63
Weighted Total	415	180	230	59	326	30	78	337	110	305	86	309	20	405	76	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not relevant	291	111	176	33	242	16	44	247	63	228	58	216	17	283	51	32
	70%	62%	76%	55%	74%	55%	56%	73%	58%	75%	67%	70%	87%	70%	67%	59%
Unaware that HEIs provided this	42	17	25	15	23	4	24	18	16	26	12	30	*	42	12	12
	10%	10%	11%	25%	7%	15%	30%	5%	14%	9%	14%	10%	1%	10%	15%	22%
Cost	21	10	10	2	14	4	5	15	3	18	11	9	-	21	5	6
	5%	6%	4%	4%	4%	15%	7%	5%	3%	6%	13%	3%	-	5%	7%	12%
Not available in my business's area	19	12	7	1	12	6	11	8	11	8	6	12	1	19	7	5
	5%	7%	3%	3%	4%	20%	15%	2%	10%	3%	7%	4%	6%	5%	9%	9%
Not good enough quality	15	10	6	1	10	4	5	10	2	13	6	10	-	15	5	5
	4%	5%	2%	2%	3%	14%	7%	3%	2%	4%	7%	3%	-	4%	6%	9%
None of the above	51	26	24	7	33	11	5	46	15	36	13	37	1	49	14	11
	12%	15%	10%	11%	10%	37%	7%	14%	14%	12%	15%	12%	6%	12%	18%	21%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Summary table

Base: All who use each service

	Total	Yes, I would recommend it	No, I would not recommend it	Don't know
Education and training for existing staff members	187 100%	107 57%	15 8%	65 35%
Research and product development (R&D)	98 100%	46 47%	9 9%	43 44%
Business advice and consultancy	135 100%	71 52%	11 8%	53 39%
Business incubation	50 100%	20 39%	5 9%	26 51%
Technology and knowledge transfer	62 100%	26 42%	8 14%	28 45%
Knowledge Transfer Partnerships	49 100%	23 46%	3 7%	24 48%
Supplying products or services to HEIs	78 100%	38 49%	6 8%	34 43%
Student placements	101 100%	70 69%	8 8%	23 23%



## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Education and training for existing staff members

Base: All who use education and training for existing staff members

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	264	99	165	30	234	9	30	47	34	34	60	21	29
Weighted Total	187	151	36	37	150	8	32	32	10	55	19	15	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	107	86	21	19	88	3	18	19	7	25	13	12	9
	57%	57%	57%	51%	59%	37%	57%	60%	75%	46%	65%	81%	54%
No, I would not recommend it	15	11	5	3	12	2	1	2	1	5	1	-	3
	8%	7%	12%	9%	8%	32%	3%	5%	11%	9%	3%	-	20%
Don't know	65	54	11	15	50	2	13	11	1	24	6	3	4
	35%	36%	31%	40%	34%	31%	40%	34%	14%	44%	32%	19%	26%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Education and training for existing staff members

Base: All who use education and training for existing staff members

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	264	152	112	94	153	17	133	131	123	141	84	168	12	259	146	117
Weighted Total	187	73	114	47	135	5	63	124	64	123	50	126	10	180	49	40
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	107	44	63	27	77	3	35	72	32	75	32	71	3	102	34	28
	57%	60%	55%	57%	57%	62%	56%	58%	50%	61%	64%	57%	30%	57%	70%	70%
No, I would not recommend it	15	7	8	5	9	1	5	10	5	10	1	13	1	13	5	5
	8%	10%	7%	10%	7%	24%	8%	8%	8%	8%	2%	10%	10%	7%	10%	12%
Don't know	65	22	43	15	49	1	22	43	27	39	17	42	6	65	10	7
	35%	30%	38%	32%	36%	14%	36%	34%	42%	31%	34%	33%	60%	36%	20%	18%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Research and product development (R&D)

Base: All who use research and product development (R&D)

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	165	43	122	24	141	9	22	29	22	26	32	10	15
Weighted Total	98	76	22	22	76	7	16	12	4	42	9	1	6
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	46	33	13	11	35	3	8	4	2	20	7	*	1
	47%	43%	59%	49%	46%	39%	50%	35%	48%	47%	82%	20%	24%
No, I would not recommend it	9	6	3	1	8	-	1	1	1	4	-	1	*
	9%	8%	12%	3%	11%	-	4%	12%	33%	10%	-	51%	5%
Don't know	43	37	6	11	33	5	7	6	1	18	2	*	4
	44%	49%	29%	49%	43%	61%	46%	53%	19%	43%	18%	29%	71%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Research and product development (R&D)

Base: All who use research and product development (R&D)

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EAA
Unweighted Total	165	101	64	66	89	10	96	69	86	79	63	96	6	163	115	85
Weighted Total	98	42	56	26	67	6	38	60	32	67	32	64	2	93	42	21
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	46	24	23	21	25	1	20	26	15	31	14	32	*	42	21	8
	47%	56%	40%	80%	37%	12%	52%	44%	48%	46%	42%	50%	9%	45%	51%	40%
No, I would not recommend it	9	1	7	3	2	4	7	1	3	5	6	3	*	8	8	7
	9%	3%	13%	10%	3%	74%	19%	2%	11%	8%	18%	4%	14%	9%	18%	32%
Don't know	43	17	26	2	40	1	11	32	13	31	12	29	2	43	13	6
	44%	41%	47%	9%	60%	15%	29%	54%	41%	46%	39%	46%	78%	46%	31%	27%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Business advice and consultancy

Base: All who use business advice and consultancy

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	195	65	130	23	172	8	25	35	29	31	32	15	20
Weighted Total	135	111	24	19	116	5	18	21	7	56	10	7	11
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	71	56	15	9	62	3	8	7	4	34	5	6	4
	52%	51%	61%	47%	53%	49%	42%	35%	54%	61%	53%	87%	38%
No, I would not recommend it	11	8	4	2	10	*	1	5	2	*	2	1	*
	8%	7%	15%	8%	8%	5%	8%	23%	23%	*	23%	10%	3%
Don't know	53	47	6	9	44	2	9	9	2	22	2	*	7
	39%	43%	24%	45%	38%	45%	50%	43%	23%	39%	25%	3%	60%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

**Business advice and consultancy**

Base: All who use business advice and consultancy

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	195	117	78	77	107	11	105	90	93	102	67	123	5	192	120	92
Weighted Total	135	64	72	35	90	10	41	94	42	94	38	95	2	130	54	32
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	71	28	43	24	45	1	22	49	17	54	14	55	1	67	30	14
	52%	44%	60%	69%	50%	11%	53%	52%	42%	57%	38%	58%	76%	52%	55%	42%
No, I would not recommend it	11	9	2	4	7	*	9	3	5	6	6	5	*	11	9	7
	8%	14%	3%	13%	8%	1%	21%	3%	13%	6%	17%	5%	18%	8%	16%	22%
Don't know	53	26	27	6	38	9	11	42	19	34	17	36	*	52	16	12
	39%	42%	37%	18%	42%	88%	26%	45%	46%	36%	45%	37%	6%	40%	29%	36%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

**Business incubation**

Base: All who use business incubation

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	104	23	81	15	89	5	12	23	16	18	16	8	6
Weighted Total	50	35	16	7	44	3	4	8	4	24	4	1	1
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	20	12	8	3	17	*	3	3	2	9	1	1	*
	39%	33%	53%	45%	39%	15%	68%	36%	50%	38%	27%	76%	15%
No, I would not recommend it	5	2	3	1	4	*	*	2	1	1	1	-	*
	9%	5%	18%	9%	9%	10%	9%	22%	16%	4%	14%	-	5%
Don't know	26	21	4	3	23	2	1	3	1	14	2	*	1
	51%	61%	29%	46%	52%	75%	23%	41%	34%	58%	60%	24%	80%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

**Business incubation**

Base: All who use business incubation

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	104	65	39	49	52	3	70	34	62	42	44	58	2	102	79	56
Weighted Total	50	26	24	20	25	5	24	27	26	24	26	23	1	49	22	13
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	20	13	7	12	8	*	13	7	12	8	13	6	*	20	8	6
	39%	49%	30%	57%	33%	2%	55%	25%	44%	35%	51%	27%	30%	41%	39%	48%
No, I would not recommend it	5	2	3	2	2	1	2	3	3	2	1	3	1	4	3	1
	9%	8%	10%	12%	6%	14%	9%	10%	12%	7%	5%	12%	70%	8%	14%	7%
Don't know	26	11	15	7	15	4	8	17	12	14	12	14	-	25	10	6
	51%	43%	60%	32%	61%	84%	36%	65%	45%	58%	44%	61%	-	51%	47%	45%



## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Technology and knowledge transfer

Base: All who use technology and knowledge transfer

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	129	30	99	19	110	7	16	25	21	17	23	9	11
Weighted Total	62	44	17	19	43	5	14	9	4	20	6	1	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	26	18	8	9	16	3	7	4	3	5	4	*	*
	42%	40%	45%	51%	38%	54%	52%	42%	62%	26%	59%	23%	18%
No, I would not recommend it	8	5	3	1	8	*	*	3	*	4	*	1	-
	14%	12%	17%	3%	18%	6%	2%	36%	2%	20%	1%	46%	-
Don't know	28	21	7	8	19	2	6	2	2	11	2	*	2
	45%	47%	38%	46%	44%	40%	46%	22%	36%	54%	40%	31%	82%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Technology and knowledge transfer

Base: All who use technology and knowledge transfer

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	129	84	45	58	67	4	85	44	75	54	52	74	3	128	91	67
Weighted Total	62	26	36	18	43	*	23	39	30	32	24	36	2	61	22	10
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	26	12	14	9	16	*	11	15	10	15	10	16	-	26	9	6
	42%	45%	39%	50%	38%	63%	47%	39%	34%	48%	42%	44%	-	42%	43%	64%
No, I would not recommend it	8	5	4	2	6	*	3	6	7	2	1	7	-	8	3	2
	14%	18%	10%	11%	15%	23%	11%	15%	23%	5%	6%	20%	-	13%	15%	22%
Don't know	28	9	18	7	20	*	10	18	13	15	12	13	2	28	9	1
	45%	36%	51%	39%	47%	14%	43%	46%	43%	47%	52%	37%	100%	45%	41%	14%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Knowledge Transfer Partnerships

Base: All who use Knowledge Transfer Partnerships

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	103	19	84	16	87	5	12	24	15	18	19	8	2
Weighted Total	49	35	15	12	38	3	9	6	3	23	4	1	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	23	13	10	4	19	*	3	4	1	10	3	1	*
	46%	36%	67%	30%	50%	12%	37%	61%	29%	45%	75%	63%	100%
No, I would not recommend it	3	2	1	1	3	*	*	1	1	*	-	*	-
	7%	6%	9%	5%	8%	4%	5%	18%	44%	1%	-	11%	-
Don't know	24	20	4	8	16	2	5	1	1	12	1	*	-
	48%	58%	24%	65%	42%	84%	58%	21%	27%	54%	25%	27%	-

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Knowledge Transfer Partnerships

Base: All who use Knowledge Transfer Partnerships

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	103	67	36	52	46	5	72	31	67	36	40	60	3	102	82	60
Weighted Total	49	24	25	21	27	1	22	28	28	22	25	23	1	49	20	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	23	14	8	13	9	1	13	10	13	10	13	9	1	23	9	6
	46%	60%	32%	60%	34%	58%	59%	35%	46%	45%	52%	38%	59%	46%	47%	70%
No, I would not recommend it	3	2	2	2	1	*	2	1	3	1	1	2	*	3	3	2
	7%	7%	7%	10%	4%	14%	11%	4%	10%	3%	5%	7%	41%	6%	14%	20%
Don't know	24	8	15	6	17	*	7	17	12	11	11	13	-	24	8	1
	48%	34%	61%	30%	62%	27%	30%	61%	44%	52%	43%	55%	-	48%	39%	10%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Supplying products or services to HEIs

Base: All who use supplying products or services to HEIs

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	137	37	100	18	119	6	15	22	22	19	31	14	8
Weighted Total	78	60	18	14	64	5	11	7	5	33	7	8	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	38	29	9	4	34	2	3	4	2	14	5	6	2
	49%	49%	48%	28%	53%	44%	24%	54%	41%	43%	76%	73%	84%
No, I would not recommend it	6	3	3	2	5	*	1	1	2	*	1	*	*
	8%	5%	17%	11%	7%	8%	11%	14%	43%	1%	11%	2%	8%
Don't know	34	28	6	9	25	2	7	2	1	18	1	2	*
	43%	46%	35%	61%	40%	48%	65%	33%	17%	56%	12%	25%	8%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Supplying products or services to HEIs

Base: All who use supplying products or services to HEIs

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	137	87	49	57	74	6	83	54	70	67	49	85	3	135	99	71
Weighted Total	78	31	42	14	58	6	17	61	29	49	25	48	5	76	29	15
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	38	12	26	8	28	1	9	29	8	30	11	26	*	38	18	7
	49%	39%	61%	60%	49%	19%	50%	48%	29%	60%	46%	55%	6%	49%	61%	45%
No, I would not recommend it	6	3	3	3	2	1	3	3	4	2	1	4	1	6	4	2
	8%	10%	7%	23%	4%	11%	20%	4%	15%	4%	5%	9%	12%	7%	13%	15%
Don't know	34	16	14	2	27	4	5	29	16	18	12	17	4	33	8	6
	43%	51%	32%	18%	47%	70%	30%	47%	57%	36%	49%	36%	82%	43%	26%	40%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Student placements

Base: All who use student placements

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	197	45	152	25	172	10	22	34	29	27	39	19	17
Weighted Total	101	70	31	18	83	8	13	18	6	32	9	9	6
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	70	51	19	12	57	5	9	12	5	24	6	7	3
	69%	72%	62%	69%	69%	67%	68%	63%	72%	74%	71%	77%	50%
No, I would not recommend it	8	3	5	2	6	*	1	1	2	1	1	1	1
	8%	5%	15%	9%	8%	5%	9%	7%	26%	3%	10%	9%	15%
Don't know	23	16	7	4	19	2	3	6	*	7	2	1	2
	23%	23%	23%	22%	23%	28%	22%	31%	2%	23%	18%	14%	34%

## QES Q3 2014

3. For each of the following services provided by an HEI that you have used, please indicate whether you would recommend your most recent experience to others.

### Student placements

Base: All who use student placements

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	197	127	70	83	101	13	126	71	103	94	66	126	5	195	133	106
Weighted Total	101	60	41	28	68	5	42	59	43	58	26	72	3	100	36	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I would recommend it	70	41	28	19	48	3	29	41	20	49	21	48	1	70	28	19
	69%	69%	68%	68%	70%	62%	69%	69%	47%	86%	79%	67%	32%	70%	80%	80%
No, I would not recommend it	8	5	3	4	3	1	4	4	6	2	3	5	1	7	3	2
	8%	8%	8%	14%	5%	17%	11%	6%	13%	4%	10%	6%	34%	7%	8%	9%
Don't know	23	14	10	5	17	1	8	15	17	6	3	19	1	23	4	3
	23%	23%	23%	19%	25%	21%	20%	25%	40%	10%	12%	27%	34%	23%	13%	10%



## QES Q3 2014

## 4. How, if at all, do you think HEIs can improve the way that they work with London businesses?

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
By marketing their services better	168	140	29	27	141	9	22	26	8	69	19	6	9
	33%	30%	51%	42%	31%	49%	36%	23%	33%	37%	48%	20%	21%
By reducing the cost of their services	131	119	12	22	110	7	20	22	6	52	9	7	8
	25%	26%	22%	34%	24%	37%	33%	20%	22%	28%	22%	24%	20%
By providing a one-stop shop as a source of information on London-wide services provided by HEIs	124	108	16	27	97	9	22	13	6	52	9	8	4
	24%	24%	28%	42%	22%	46%	35%	12%	23%	28%	23%	27%	11%
By improving their interaction with businesses on curriculum development and employability	100	80	20	18	82	5	15	14	6	40	10	4	5
	19%	17%	36%	28%	18%	24%	25%	13%	25%	21%	25%	14%	13%
By improving the quality of services provided	87	74	13	13	75	4	13	8	4	34	11	6	6
	17%	16%	24%	20%	16%	23%	21%	8%	17%	18%	27%	19%	16%
By providing new services for businesses that are not currently offered	*	-	*	-	*	-	-	-	*	-	-	-	*
	*	-	*	-	*	-	-	-	1%	-	-	-	*
Other, please specify	1	1	1	*	1	*	-	-	-	-	1	-	-
	*	*	1%	*	*	2%	-	-	-	-	2%	-	-
Don't know	166	156	10	9	157	4	10	52	9	47	11	12	21
	32%	34%	17%	14%	35%	23%	17%	46%	34%	25%	27%	40%	51%

## QES Q3 2014

## 4. How, if at all, do you think HEIs can improve the way that they work with London businesses?

Base: All respondents

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
I do not think that there is anything HEIs can do to improve the way that they work with London businesses	53	49	4	5	48	*	6	18	1	21	2	-	5
	10%	11%	6%	8%	11%	*	9%	16%	3%	11%	5%	-	12%

## QES Q3 2014

## 4. How, if at all, do you think HEIs can improve the way that they work with London businesses?

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
By marketing their services better	168	81	87	41	123	4	41	128	34	134	36	130	3	161	45	32
	33%	34%	32%	47%	31%	13%	34%	32%	22%	37%	32%	34%	14%	32%	40%	40%
By reducing the cost of their services	131	47	84	21	101	9	35	96	43	88	42	86	4	128	35	24
	25%	20%	31%	25%	26%	26%	29%	24%	28%	24%	37%	22%	17%	25%	31%	30%
By providing a one-stop shop as a source of information on London-wide services provided by HEIs	124	49	75	31	86	7	35	89	36	88	34	87	3	124	36	21
	24%	20%	28%	35%	22%	21%	29%	22%	24%	24%	30%	23%	13%	25%	33%	27%
By improving their interaction with businesses on curriculum development and employability	100	42	58	29	65	5	38	62	29	70	27	70	2	92	40	26
	19%	17%	21%	34%	16%	16%	32%	16%	19%	19%	24%	18%	10%	18%	35%	33%
By improving the quality of services provided	87	42	45	19	62	6	26	62	23	64	22	61	5	85	31	23
	17%	18%	17%	22%	16%	17%	21%	16%	15%	18%	19%	16%	21%	17%	28%	29%
By providing new services for businesses that are not currently offered	*	*	*	*	-	*	*	-	*	*	-	*	-	*	*	*
	*	*	*	*	-	*	*	-	*	*	-	*	-	*	*	*
Other, please specify	1	*	1	*	1	*	*	1	-	1	-	1	-	1	1	-
	*	*	*	1%	*	*	*	*	-	*	-	*	-	*	*	-
Don't know	166	74	92	16	133	17	24	142	48	118	36	121	9	164	21	21
	32%	31%	34%	18%	34%	50%	20%	36%	31%	33%	32%	32%	42%	33%	18%	27%
I do not think that there is anything HEIs can do to improve the way that they work with London businesses	53	24	24	1	47	5	7	46	13	40	7	41	5	53	7	2
	10%	10%	9%	1%	12%	16%	6%	12%	8%	11%	6%	11%	24%	10%	6%	3%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Summary table

Base: All respondents

						Net
	Total	In the last year	More than a year ago but no more than three years ago	More than three years ago	Never	Ever
Education and training for existing staff members	516 100%	41 8%	21 4%	46 9%	408 79%	108 21%
Apprenticeship training	516 100%	12 2%	16 3%	30 6%	459 89%	57 11%
Business advice and consultancy	516 100%	22 4%	20 4%	35 7%	438 85%	78 15%
Business incubation (facilities hosted by a college to support start-up and early-stage companies)	516 100%	4 1%	10 2%	19 4%	483 94%	33 6%
Provision of work experience students	516 100%	31 6%	20 4%	36 7%	429 83%	87 17%
Facilitating recruitment, e.g. via career workshops or fairs	516 100%	6 1%	19 4%	24 5%	467 90%	49 10%
Supplying products or services to FE colleges	516 100%	14 3%	9 2%	19 4%	474 92%	42 8%
Student placements	516 100%	31 6%	20 4%	29 6%	436 84%	80 16%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Education and training for existing staff members

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	41	29	12	7	35	1	6	20	1	3	4	2	3
	8%	6%	22%	11%	8%	4%	10%	18%	4%	2%	11%	8%	9%
More than a year ago but no more than three years ago	21	14	7	4	17	*	4	7	2	5	2	*	*
	4%	3%	12%	6%	4%	2%	7%	6%	6%	3%	5%	1%	*
More than three years ago	46	40	6	2	44	2	*	10	3	19	2	5	5
	9%	9%	11%	3%	10%	11%	*	9%	12%	10%	5%	17%	12%
Never	408	376	31	51	356	16	51	75	20	160	32	22	32
	79%	82%	56%	80%	79%	83%	82%	67%	77%	85%	80%	73%	79%
<b>Net</b>													
Ever	108	83	25	13	96	3	11	36	6	28	8	8	9
	21%	18%	44%	20%	21%	17%	18%	33%	23%	15%	20%	27%	21%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Education and training for existing staff members

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	41	16	25	9	31	1	20	22	16	26	6	34	1	40	13	10
	8%	7%	9%	10%	8%	3%	16%	5%	10%	7%	6%	9%	6%	8%	11%	13%
More than a year ago but no more than three years ago	21	12	9	7	13	*	18	3	10	11	8	12	1	20	12	8
	4%	5%	3%	9%	3%	*	15%	1%	7%	3%	8%	3%	4%	4%	11%	10%
More than three years ago	46	19	28	9	35	2	16	30	20	26	13	32	2	45	6	7
	9%	8%	10%	11%	9%	6%	13%	8%	13%	7%	11%	8%	8%	9%	6%	8%
Never	408	193	209	61	314	32	67	341	107	300	85	305	18	399	81	54
	79%	81%	77%	71%	80%	91%	56%	86%	70%	83%	76%	80%	81%	79%	73%	69%
<b>Net</b>																
Ever	108	47	62	26	80	3	53	55	46	63	28	77	4	105	31	25
	21%	19%	23%	29%	20%	9%	44%	14%	30%	17%	24%	20%	19%	21%	27%	31%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Apprenticeship training

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	12	6	7	7	5	1	7	2	1	*	1	1	*
	2%	1%	12%	11%	1%	3%	11%	2%	3%	*	2%	4%	*
More than a year ago but no more than three years ago	16	11	5	2	14	*	2	10	1	*	1	1	*
	3%	2%	9%	3%	3%	*	3%	9%	5%	*	2%	3%	*
More than three years ago	30	25	4	9	21	5	5	2	1	13	1	1	2
	6%	6%	8%	14%	5%	24%	7%	2%	3%	7%	3%	3%	5%
Never	459	418	40	46	413	14	48	97	22	173	38	27	39
	89%	91%	72%	72%	91%	72%	79%	87%	88%	92%	94%	90%	95%
<b>Net</b>													
Ever	57	42	16	18	39	5	13	14	3	14	3	3	2
	11%	9%	28%	28%	9%	28%	21%	13%	12%	8%	6%	10%	5%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Apprenticeship training

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	12	4	8	4	8	-	6	6	6	6	3	9	-	12	6	4
	2%	2%	3%	5%	2%	-	5%	1%	4%	2%	3%	2%	-	2%	5%	5%
More than a year ago but no more than three years ago	16	9	7	7	8	-	13	3	7	9	8	7	*	15	13	9
	3%	4%	2%	8%	2%	-	11%	1%	4%	2%	7%	2%	1%	3%	11%	12%
More than three years ago	30	15	15	3	21	5	2	27	8	21	15	14	1	30	13	6
	6%	6%	5%	4%	5%	14%	2%	7%	6%	6%	13%	4%	3%	6%	12%	8%
Never	459	212	241	72	356	30	99	360	132	326	86	351	21	448	80	59
	89%	88%	89%	83%	90%	86%	82%	91%	86%	90%	77%	92%	96%	89%	72%	75%
<b>Net</b>																
Ever	57	28	30	15	38	5	21	36	21	37	26	30	1	57	31	20
	11%	12%	11%	17%	10%	14%	18%	9%	14%	10%	23%	8%	4%	11%	28%	25%



## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Business advice and consultancy

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	22	16	6	7	16	*	8	3	1	5	2	2	2
	4%	4%	11%	11%	3%	1%	14%	3%	2%	3%	4%	5%	5%
More than a year ago but no more than three years ago	20	13	7	5	15	3	2	3	2	6	1	1	3
	4%	3%	13%	7%	3%	13%	3%	2%	8%	3%	2%	3%	7%
More than three years ago	35	31	4	7	28	2	5	5	1	17	3	*	2
	7%	7%	7%	11%	6%	11%	9%	4%	5%	9%	7%	1%	5%
Never	438	399	39	45	393	14	46	101	21	160	35	27	34
	85%	87%	69%	71%	87%	75%	74%	91%	85%	85%	87%	92%	83%
<b>Net</b>													
Ever	78	60	17	19	59	5	16	10	4	28	5	3	7
	15%	13%	31%	29%	13%	25%	26%	9%	15%	15%	13%	8%	17%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Business advice and consultancy

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	22	13	10	5	18	*	11	11	8	14	6	16	-	22	7	5
	4%	5%	4%	5%	4%	1%	9%	3%	5%	4%	5%	4%	-	4%	6%	6%
More than a year ago but no more than three years ago	20	9	11	8	12	-	8	12	10	11	6	14	1	19	7	6
	4%	4%	4%	9%	3%	-	7%	3%	6%	3%	5%	4%	2%	4%	6%	7%
More than three years ago	35	13	22	7	27	1	7	28	10	25	11	24	*	35	12	3
	7%	5%	8%	8%	7%	2%	6%	7%	7%	7%	10%	6%	1%	7%	11%	4%
Never	438	205	228	67	338	34	94	345	125	313	90	327	21	428	86	65
	85%	86%	84%	77%	86%	97%	78%	87%	82%	86%	80%	86%	96%	85%	77%	83%
<b>Net</b>																
Ever	78	34	43	20	57	1	26	51	28	50	22	54	1	76	26	13
	15%	14%	16%	23%	14%	3%	22%	13%	18%	14%	20%	14%	4%	15%	23%	17%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Business incubation (facilities hosted by a college to support start-up and early-stage companies)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	4	2	3	1	3	*	1	1	1	*	*	*	-
	1%	*	4%	1%	1%	*	1%	1%	5%	*	1%	1%	-
More than a year ago but no more than three years ago	10	4	5	2	7	*	2	4	1	2	*	*	*
	2%	1%	10%	4%	2%	2%	3%	3%	6%	1%	*	*	*
More than three years ago	19	15	3	7	12	2	5	1	1	8	1	1	*
	4%	3%	6%	11%	3%	13%	8%	1%	2%	4%	3%	3%	*
Never	483	438	45	54	429	16	54	106	22	177	39	29	41
	94%	95%	80%	84%	95%	86%	88%	95%	87%	94%	96%	96%	100%
<b>Net</b>													
Ever	33	21	11	10	23	3	8	6	3	10	2	1	*
	6%	5%	20%	16%	5%	14%	12%	5%	13%	6%	4%	4%	*

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Business incubation (facilities hosted by a college to support start-up and early-stage companies)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	4	2	2	2	2	-	3	2	2	2	2	2	*	4	3	2
	1%	1%	1%	2%	1%	-	2%	*	1%	1%	2%	1%	1%	1%	3%	3%
More than a year ago but no more than three years ago	10	7	2	6	4	-	8	1	9	*	4	6	-	9	6	2
	2%	3%	1%	7%	1%	-	7%	*	6%	*	4%	1%	-	2%	5%	3%
More than three years ago	19	6	13	3	16	*	2	17	7	12	11	8	*	19	8	3
	4%	2%	5%	3%	4%	1%	2%	4%	4%	3%	9%	2%	*	4%	8%	3%
Never	483	224	253	76	372	34	107	376	135	348	96	365	22	472	95	71
	94%	94%	93%	88%	94%	99%	89%	95%	89%	96%	85%	96%	98%	94%	85%	91%
<b>Net</b>																
Ever	33	15	18	11	22	*	13	20	18	15	17	16	*	32	17	7
	6%	6%	7%	12%	6%	1%	11%	5%	11%	4%	15%	4%	2%	6%	15%	9%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Provision of work experience students

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	31	19	12	2	28	*	3	9	4	9	1	3	2
	6%	4%	21%	4%	6%	2%	4%	8%	15%	5%	4%	9%	5%
More than a year ago but no more than three years ago	20	14	6	3	17	3	1	6	1	4	2	2	1
	4%	3%	11%	5%	4%	13%	2%	6%	4%	2%	6%	5%	2%
More than three years ago	36	31	6	2	34	-	2	8	1	19	1	4	1
	7%	7%	10%	3%	8%	-	4%	7%	6%	10%	3%	12%	3%
Never	429	396	33	56	373	16	56	88	19	156	35	22	37
	83%	86%	58%	88%	82%	85%	91%	79%	76%	83%	87%	74%	90%
<b>Net</b>													
Ever	87	63	24	8	79	3	6	24	6	32	5	8	4
	17%	14%	42%	12%	18%	15%	9%	21%	24%	17%	13%	26%	10%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Provision of work experience students

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	31	24	6	10	19	2	22	9	20	11	9	21	*	31	9	9
	6%	10%	2%	11%	5%	6%	18%	2%	13%	3%	8%	6%	1%	6%	8%	11%
More than a year ago but no more than three years ago	20	6	14	8	12	-	10	10	13	7	7	13	-	19	10	7
	4%	2%	5%	10%	3%	-	8%	3%	8%	2%	6%	3%	-	4%	9%	10%
More than three years ago	36	22	15	11	21	4	17	19	14	23	11	25	*	35	16	9
	7%	9%	5%	13%	5%	12%	15%	5%	9%	6%	10%	7%	*	7%	14%	12%
Never	429	188	236	57	343	28	70	358	106	322	85	322	22	420	77	53
	83%	78%	87%	66%	87%	81%	59%	90%	70%	89%	76%	84%	98%	83%	69%	67%
<b>Net</b>																
Ever	87	52	35	30	51	6	49	38	47	40	27	59	*	85	35	26
	17%	22%	13%	34%	13%	19%	41%	10%	30%	11%	24%	16%	2%	17%	31%	33%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Facilitating recruitment, e.g. via career workshops or fairs

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	6	2	4	*	5	-	*	*	1	1	2	*	2
	1%	*	7%	1%	1%	-	1%	*	3%	*	4%	1%	4%
More than a year ago but no more than three years ago	19	12	7	3	16	*	2	4	2	5	2	1	2
	4%	3%	12%	4%	4%	2%	4%	4%	8%	3%	5%	2%	5%
More than three years ago	24	20	5	7	17	2	5	5	*	10	1	1	-
	5%	4%	8%	11%	4%	11%	8%	5%	1%	5%	2%	3%	-
Never	467	426	41	54	413	17	54	101	22	172	36	28	37
	90%	93%	73%	84%	91%	87%	87%	91%	87%	92%	89%	93%	91%
<b>Net</b>													
Ever	49	34	15	10	39	2	8	10	3	15	4	2	4
	10%	7%	27%	16%	9%	13%	13%	9%	13%	8%	11%	7%	9%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Facilitating recruitment, e.g. via career workshops or fairs

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	6	3	3	2	4	*	3	3	3	3	2	4	*	5	3	3
	1%	1%	1%	2%	1%	1%	2%	1%	2%	1%	2%	1%	*	1%	3%	4%
More than a year ago but no more than three years ago	19	15	4	9	9	*	8	10	16	3	6	13	*	18	10	4
	4%	6%	2%	11%	2%	*	7%	3%	10%	1%	5%	3%	1%	4%	9%	5%
More than three years ago	24	5	20	2	23	*	4	20	7	18	10	14	*	24	8	3
	5%	2%	7%	2%	6%	*	4%	5%	4%	5%	9%	4%	*	5%	7%	4%
Never	467	217	245	74	359	34	105	362	128	339	95	350	22	457	91	68
	90%	91%	90%	85%	91%	98%	87%	92%	84%	93%	84%	92%	98%	91%	81%	86%
<b>Net</b>																
Ever	49	23	26	13	36	1	15	34	25	24	18	31	*	47	21	11
	10%	9%	10%	15%	9%	2%	13%	8%	16%	7%	16%	8%	2%	9%	19%	14%



## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Supplying products or services to FE colleges

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	14	6	7	7	7	-	7	2	1	1	1	1	1
	3%	1%	13%	10%	2%	-	11%	2%	2%	1%	2%	5%	3%
More than a year ago but no more than three years ago	9	4	5	1	8	*	1	2	2	2	2	*	*
	2%	1%	8%	2%	2%	2%	1%	2%	7%	1%	4%	*	*
More than three years ago	19	17	3	9	11	4	5	1	1	5	2	*	1
	4%	4%	5%	14%	2%	22%	7%	1%	4%	3%	5%	1%	2%
Never	474	433	42	48	426	15	50	107	22	179	36	28	38
	92%	94%	74%	75%	94%	76%	81%	95%	88%	95%	89%	94%	94%
<b>Net</b>													
Ever	42	27	15	16	26	5	12	5	3	9	4	2	2
	8%	6%	26%	25%	6%	24%	19%	5%	12%	5%	11%	6%	6%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Supplying products or services to FE colleges

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	14	4	5	6	7	*	7	6	7	7	4	5	4	14	7	4
	3%	2%	2%	7%	2%	*	6%	2%	5%	2%	3%	1%	20%	3%	6%	5%
More than a year ago but no more than three years ago	9	6	2	4	5	-	6	3	7	2	3	5	-	8	4	2
	2%	3%	1%	5%	1%	-	5%	1%	5%	*	3%	1%	-	2%	4%	3%
More than three years ago	19	4	15	2	16	1	2	17	4	16	10	9	1	19	8	2
	4%	2%	6%	3%	4%	2%	2%	4%	2%	4%	9%	2%	3%	4%	7%	2%
Never	474	225	249	74	366	34	104	370	135	339	95	362	17	464	93	70
	92%	94%	92%	86%	93%	98%	87%	93%	88%	93%	85%	95%	77%	92%	83%	89%
<b>Net</b>																
Ever	42	15	23	13	28	1	16	26	18	24	17	20	5	41	19	9
	8%	6%	8%	14%	7%	2%	13%	7%	12%	7%	15%	5%	23%	8%	17%	11%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Student placements

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	31	20	11	4	27	2	3	13	2	7	2	2	1
	6%	4%	20%	7%	6%	11%	5%	12%	7%	4%	6%	6%	2%
More than a year ago but no more than three years ago	20	15	5	1	19	*	1	3	2	8	2	1	2
	4%	3%	9%	2%	4%	2%	2%	3%	7%	4%	5%	5%	5%
More than three years ago	29	23	7	3	27	*	4	7	1	15	1	*	1
	6%	5%	12%	4%	6%	1%	6%	6%	4%	8%	3%	1%	2%
Never	436	403	33	56	380	17	54	89	21	158	35	27	37
	84%	88%	59%	87%	84%	87%	88%	79%	82%	84%	86%	89%	90%
<b>Net</b>													
Ever	80	57	23	8	72	3	7	23	5	30	5	3	4
	16%	12%	41%	13%	16%	13%	12%	21%	18%	16%	14%	11%	10%

## QES Q3 2014

## 5. How recently, if at all, has your business used each of the following services provided by a further education (FE) college, e.g. a sixth form or technical college?

## Student placements

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
In the last year	31	20	11	9	22	*	23	8	19	12	7	24	-	31	12	10
	6%	8%	4%	11%	5%	1%	19%	2%	12%	3%	6%	6%	-	6%	11%	13%
More than a year ago but no more than three years ago	20	11	9	6	13	*	6	14	17	3	9	11	-	19	6	3
	4%	5%	3%	7%	3%	1%	5%	4%	11%	1%	8%	3%	-	4%	5%	3%
More than three years ago	29	15	14	7	16	6	14	15	5	25	11	16	2	29	14	7
	6%	6%	5%	8%	4%	17%	12%	4%	3%	7%	10%	4%	9%	6%	12%	8%
Never	436	193	238	64	343	29	77	359	113	323	86	330	20	425	80	59
	84%	80%	88%	74%	87%	82%	64%	91%	74%	89%	76%	87%	91%	84%	72%	76%
<b>Net</b>																
Ever	80	47	34	23	51	6	43	37	40	40	27	51	2	79	31	19
	16%	20%	12%	26%	13%	18%	36%	9%	26%	11%	24%	13%	9%	16%	28%	24%

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## Summary table

Base: All respondents

	UK citizens	EU / EEA citizens, excluding the UK	Citizens from outside the UK / EU / EEA
Unweighted Total	516	516	516
Weighted Total	516	516	516
	100%	100%	100%
0%	11 2%	404 78%	438 85%
1-9%	- -	8 2%	6 1%
10-19%	1 *	33 6%	29 6%
20-29%	13 2%	15 3%	13 2%
30-39%	5 1%	11 2%	8 1%
40-49%	3 1%	8 1%	5 1%
50-59%	39 8%	17 3%	15 3%
60-69%	9 2%	5 1%	- -
70-79%	12 2%	2 *	- -
80-89%	30 6%	6 1%	* *
90-99%	23 4%	1 *	- -
100%	370 72%	8 2%	3 1%

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## Summary table

Base: All respondents

	UK citizens	EU / EEA citizens, excluding the UK	Citizens from outside the UK / EU / EEA
Unweighted Total	516	516	516
Weighted Total	516	516	516
	100%	100%	100%
<b>Nets</b>			
0-49%	33 6%	478 93%	498 97%
50% or more	483 94%	38 7%	18 3%
Any	505 98%	112 22%	78 15%
Median	100	0	0
Mean Score	88.14	7.80	4.06

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## UK citizens

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0%	11	11	-	-	11	-	-	2	1	4	1	-	4
	2%	2%	-	-	3%	-	-	2%	3%	2%	3%	-	9%
1-9%	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
10-19%	1	-	1	1	*	-	1	*	-	*	*	-	-
	*	-	2%	1%	*	-	1%	*	-	*	*	-	-
20-29%	13	11	1	*	12	*	*	7	*	4	1	*	*
	2%	2%	2%	*	3%	1%	*	6%	*	2%	2%	1%	*
30-39%	5	4	1	1	4	-	1	-	-	4	*	*	*
	1%	1%	2%	1%	1%	-	1%	-	-	2%	*	*	*
40-49%	3	2	1	1	2	-	1	1	1	-	-	-	-
	1%	*	2%	1%	*	-	1%	1%	4%	-	-	-	-
50-59%	39	35	4	2	37	1	3	5	3	21	4	*	2
	8%	8%	8%	3%	8%	5%	6%	4%	12%	11%	9%	*	5%
60-69%	9	7	3	2	7	2	1	3	1	*	1	1	*
	2%	1%	5%	3%	2%	11%	2%	2%	3%	*	3%	2%	*
70-79%	12	6	6	3	9	2	1	2	1	3	1	1	*
	2%	1%	10%	5%	2%	11%	2%	1%	4%	2%	4%	4%	1%
80-89%	30	22	8	1	29	*	2	8	1	11	1	5	2
	6%	5%	14%	2%	6%	*	3%	8%	6%	6%	3%	15%	4%

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## UK citizens

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
90-99%	23	13	10	6	17	*	7	2	2	3	1	5	3
	4%	3%	17%	10%	4%	1%	11%	2%	9%	2%	2%	16%	7%
100%	370	349	21	47	323	14	45	81	15	137	30	18	29
	72%	76%	37%	73%	71%	71%	73%	73%	61%	73%	75%	62%	72%
<b>Nets</b>													
0-49%	33	28	5	3	31	*	3	10	2	12	2	*	4
	6%	6%	9%	4%	7%	1%	4%	9%	7%	7%	5%	1%	10%
50% or more	483	431	51	61	421	19	59	101	24	175	38	30	37
	94%	94%	91%	96%	93%	99%	96%	91%	93%	93%	95%	99%	90%
Any	505	448	56	64	440	19	61	110	25	183	39	30	37
	98%	98%	100%	100%	97%	100%	100%	98%	97%	98%	97%	100%	91%
Median	100	100	90	100	100	100	100	100	100	100	100	100	100
Mean Score	88.14	88.99	81.18	92.05	87.59	90.55	91.58	87.41	85.47	87.12	88.70	93.33	85.82



## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## UK citizens

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0%	11	5	7	4	7	-	-	11	2	9	4	7	-	-	8	3
	2%	2%	3%	5%	2%	-	-	3%	1%	3%	4%	2%	-	-	8%	4%
1-9%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
10-19%	1	1	-	*	1	-	*	1	*	1	-	1	-	1	1	*
	*	*	-	*	*	-	*	*	*	*	-	*	-	*	1%	*
20-29%	13	5	8	1	8	4	1	12	1	12	10	3	*	13	13	6
	2%	2%	3%	1%	2%	12%	1%	3%	*	3%	9%	1%	*	3%	11%	8%
30-39%	5	5	*	4	1	-	1	4	*	4	*	4	*	5	5	1
	1%	2%	*	5%	*	-	1%	1%	*	1%	*	1%	1%	1%	4%	2%
40-49%	3	2	1	2	1	-	2	1	3	-	1	2	-	3	3	3
	1%	1%	*	2%	*	-	2%	*	2%	-	1%	1%	-	1%	3%	4%
50-59%	39	22	16	10	27	2	13	26	13	26	4	34	2	39	26	22
	8%	9%	6%	12%	7%	5%	11%	7%	8%	7%	3%	9%	7%	8%	23%	28%
60-69%	9	4	6	4	4	*	5	5	5	4	2	7	*	9	8	6
	2%	2%	2%	5%	1%	1%	4%	1%	3%	1%	2%	2%	*	2%	7%	8%
70-79%	12	7	4	4	7	*	5	7	3	9	2	10	-	12	8	8
	2%	3%	2%	5%	2%	*	4%	2%	2%	2%	2%	3%	-	2%	7%	10%
80-89%	30	19	11	8	12	10	22	7	13	17	12	17	*	30	22	21
	6%	8%	4%	9%	3%	28%	19%	2%	9%	5%	11%	5%	*	6%	20%	27%
90-99%	23	15	8	6	16	*	7	16	13	10	9	14	*	23	17	8
	4%	6%	3%	7%	4%	1%	6%	4%	8%	3%	8%	4%	2%	5%	15%	10%
100%	370	156	210	42	309	18	64	306	100	270	68	282	20	370	-	-
	72%	65%	77%	49%	78%	53%	53%	77%	65%	74%	60%	74%	89%	73%	-	-

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## UK citizens

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EAA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Nets</b>																
0-49%	33	17	16	11	18	4	4	29	7	27	15	18	*	22	30	13
	6%	7%	6%	13%	5%	12%	4%	7%	4%	7%	14%	5%	2%	4%	27%	17%
50% or more	483	222	255	76	376	31	116	367	146	336	97	364	22	483	82	65
	94%	93%	94%	87%	95%	88%	96%	93%	96%	93%	86%	95%	98%	96%	73%	83%
Any	505	235	264	83	387	35	120	385	151	354	108	374	22	505	103	75
	98%	98%	97%	95%	98%	100%	100%	97%	99%	97%	96%	98%	100%	100%	92%	96%
Median	100	100	100	95	100	100	100	100	100	100	100	100	100	100	50	60
Mean Score	88.14	86.31	89.70	78.47	90.83	81.87	85.68	88.89	88.63	87.94	82.82	89.31	95.03	90.14	56.57	60.99

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0%	404	377	27	48	356	14	47	83	19	152	34	20	34
	78%	82%	49%	75%	79%	71%	77%	74%	77%	81%	85%	68%	84%
1-9%	8	4	5	1	7	*	1	1	1	*	1	5	*
	2%	1%	8%	2%	2%	*	2%	1%	3%	*	1%	15%	*
10-19%	33	24	8	5	27	*	6	5	2	12	1	4	2
	6%	5%	15%	9%	6%	1%	9%	5%	9%	6%	2%	13%	5%
20-29%	15	9	6	2	12	2	1	6	1	1	2	1	1
	3%	2%	10%	4%	3%	12%	2%	5%	4%	1%	5%	3%	1%
30-39%	11	6	4	4	7	2	3	3	*	*	2	*	*
	2%	1%	8%	6%	1%	11%	4%	3%	1%	*	4%	*	1%
40-49%	8	7	1	*	7	*	*	2	*	4	*	-	1
	1%	1%	1%	*	2%	*	*	2%	*	2%	*	-	3%
50-59%	17	14	3	2	15	1	2	4	1	9	1	*	-
	3%	3%	5%	3%	3%	4%	3%	3%	3%	5%	3%	*	-
60-69%	5	4	1	1	4	-	1	-	-	4	-	-	-
	1%	1%	1%	1%	1%	-	1%	-	-	2%	-	-	-
70-79%	2	1	1	-	2	-	-	1	*	-	-	*	*
	*	*	1%	-	*	-	-	1%	*	-	-	1%	*
80-89%	6	6	*	-	6	-	-	6	-	*	-	-	-
	1%	1%	*	-	1%	-	-	5%	-	*	-	-	-

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
90-99%	1	-	1	1	-	-	1	-	-	-	-	-	-
	*	-	2%	1%	-	-	1%	-	-	-	-	-	-
100%	8	8	-	-	8	-	-	2	1	4	-	-	2
	2%	2%	-	-	2%	-	-	2%	3%	2%	-	-	5%
<b>Nets</b>													
0-49%	478	427	51	61	417	18	58	100	24	170	39	30	39
	93%	93%	91%	95%	92%	96%	95%	89%	94%	91%	97%	99%	95%
50% or more	38	33	5	3	35	1	3	12	1	17	1	*	2
	7%	7%	9%	5%	8%	4%	5%	11%	6%	9%	3%	1%	5%
Any	112	83	29	16	96	5	14	29	6	35	6	10	7
	22%	18%	51%	25%	21%	29%	23%	26%	23%	19%	15%	32%	16%
Median	0	0	1	0	0	0	0	0	0	0	0	0	0
Mean Score	7.80	7.18	12.90	7.22	7.88	9.08	6.27	10.96	6.84	7.94	4.30	3.50	7.45

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EEA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0%	404	176	223	47	338	19	76	328	115	290	76	309	20	401	-	34
	78%	74%	82%	54%	86%	55%	63%	83%	75%	80%	67%	81%	89%	79%	-	43%
1-9%	8	6	2	5	3	*	6	3	6	2	1	7	*	8	8	5
	2%	3%	1%	5%	1%	1%	5%	1%	4%	1%	1%	2%	1%	2%	7%	7%
10-19%	33	20	13	11	17	4	20	12	15	17	17	16	*	33	33	18
	6%	8%	5%	13%	4%	13%	17%	3%	10%	5%	15%	4%	1%	6%	29%	23%
20-29%	15	10	5	3	6	6	5	9	4	10	3	12	*	15	15	6
	3%	4%	2%	4%	1%	16%	4%	2%	3%	3%	3%	3%	*	3%	13%	8%
30-39%	11	5	5	6	4	*	5	6	5	5	1	9	*	11	11	6
	2%	2%	2%	7%	1%	1%	4%	1%	3%	2%	1%	2%	1%	2%	10%	8%
40-49%	8	5	2	*	2	5	1	6	2	6	5	2	1	8	8	7
	1%	2%	1%	*	1%	15%	1%	2%	1%	2%	4%	*	4%	2%	7%	9%
50-59%	17	8	8	5	11	*	5	11	4	13	1	15	1	17	17	*
	3%	4%	3%	6%	3%	*	4%	3%	2%	4%	1%	4%	2%	3%	15%	*
60-69%	5	4	*	4	1	-	1	4	-	5	*	4	*	5	5	1
	1%	2%	*	5%	*	-	1%	1%	-	1%	*	1%	1%	1%	4%	1%
70-79%	2	*	1	*	1	-	*	1	*	1	-	2	-	2	2	1
	*	*	1%	*	*	-	*	*	*	*	-	*	-	*	1%	1%
80-89%	6	*	6	*	6	-	*	6	-	6	6	*	-	6	6	*
	1%	*	2%	*	1%	-	*	1%	-	2%	5%	*	-	1%	5%	*
90-99%	1	1	-	-	1	-	-	1	-	1	-	1	-	1	1	-
	*	*	-	-	*	-	-	*	-	*	-	*	-	*	1%	-
100%	8	3	6	4	4	-	-	8	2	6	3	6	-	-	8	-
	2%	1%	2%	5%	1%	-	-	2%	1%	2%	2%	2%	-	-	8%	-

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EEA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Nets</b>																
0-49%	478	223	250	73	370	35	113	365	147	331	103	353	21	475	74	77
	93%	93%	92%	84%	94%	100%	94%	92%	96%	91%	92%	93%	96%	94%	66%	98%
50% or more	38	17	22	14	24	*	7	32	6	32	9	28	1	30	38	2
	7%	7%	8%	16%	6%	*	6%	8%	4%	9%	8%	7%	4%	6%	34%	2%
Any	112	63	48	40	56	16	44	68	38	73	37	73	2	103	112	44
	22%	26%	18%	46%	14%	45%	37%	17%	25%	20%	33%	19%	11%	21%	100%	57%
Median	0	0	0	0	0	0	0	0	0	0	0	0	0	0	30	8
Mean Score	7.80	8.01	7.63	16.34	5.65	10.84	7.86	7.79	6.25	8.46	11.20	7.01	4.15	6.30	35.97	12.32

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## Citizens from outside the UK / EU / EEA (e.g. America, China)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0%	438	404	33	61	377	19	56	99	18	155	33	23	34
	85%	88%	59%	95%	83%	99%	91%	89%	70%	83%	81%	78%	84%
1-9%	6	1	5	1	5	-	1	1	1	1	1	*	1
	1%	*	9%	2%	1%	-	2%	1%	5%	*	1%	1%	3%
10-19%	29	19	11	1	28	*	1	8	2	10	2	4	2
	6%	4%	19%	1%	6%	*	2%	7%	7%	5%	5%	14%	5%
20-29%	13	8	5	1	12	*	1	2	2	5	2	1	-
	2%	2%	9%	1%	3%	*	1%	2%	6%	3%	5%	3%	-
30-39%	8	7	1	-	8	-	*	1	1	4	*	1	-
	1%	2%	1%	-	2%	-	*	1%	3%	2%	*	4%	-
40-49%	5	4	1	-	5	-	-	*	*	4	*	*	*
	1%	1%	2%	-	1%	-	-	*	1%	2%	1%	*	*
50-59%	15	14	1	*	14	*	2	*	2	8	2	-	1
	3%	3%	1%	*	3%	1%	3%	*	8%	4%	4%	-	2%
60-69%	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
70-79%	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-
80-89%	*	-	*	-	*	-	-	-	-	-	*	-	-
	*	-	*	-	*	-	-	-	-	-	*	-	-

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## Citizens from outside the UK / EU / EEA (e.g. America, China)

Base: All respondents

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
90-99%	-	-	-	-	-	-	-	-	-	-	-	-	-
100%	3	3	-	-	3	-	-	-	-	-	1	-	2
	1%	1%	-	-	1%	-	-	-	-	-	3%	-	5%
<b>Nets</b>													
0-49%	498	443	56	64	434	19	60	111	23	180	38	30	38
	97%	96%	99%	100%	96%	99%	97%	100%	92%	96%	93%	100%	93%
50% or more	18	17	1	*	18	*	2	*	2	8	3	-	3
	3%	4%	1%	*	4%	1%	3%	*	8%	4%	7%	-	7%
Any	78	55	23	3	75	*	5	12	8	32	8	7	7
	15%	12%	41%	5%	17%	1%	9%	11%	30%	17%	19%	22%	16%
Median	0	0	0	0	0	0	0	0	0	0	0	0	0
Mean Score	4.06	3.83	5.92	.73	4.53	.37	2.15	1.62	7.70	4.94	6.99	3.16	6.73



## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## Citizens from outside the UK / EU / EEA (e.g. America, China)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EEA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0%	438	188	245	62	352	24	76	362	120	318	86	331	20	429	68	-
	85%	79%	90%	71%	89%	68%	63%	91%	78%	88%	77%	87%	92%	85%	60%	-
1-9%	6	5	1	4	2	*	5	1	4	2	2	4	*	6	4	6
	1%	2%	1%	5%	*	1%	4%	*	2%	1%	2%	1%	1%	1%	4%	8%
10-19%	29	19	9	11	12	6	22	7	9	21	12	16	1	29	23	29
	6%	8%	3%	13%	3%	16%	19%	2%	6%	6%	11%	4%	6%	6%	20%	37%
20-29%	13	6	6	3	8	1	8	5	8	4	1	11	*	13	6	13
	2%	3%	2%	3%	2%	4%	7%	1%	5%	1%	1%	3%	*	2%	5%	16%
30-39%	8	6	1	5	2	-	6	2	8	*	1	6	-	8	5	8
	1%	3%	*	6%	1%	-	5%	*	5%	*	1%	2%	-	2%	4%	10%
40-49%	5	5	*	*	1	4	1	4	1	4	5	*	-	5	5	5
	1%	2%	*	*	*	12%	1%	1%	1%	1%	4%	*	-	1%	4%	7%
50-59%	15	8	7	1	13	-	3	12	4	10	2	12	*	15	2	15
	3%	3%	3%	1%	3%	-	2%	3%	3%	3%	2%	3%	*	3%	2%	19%
60-69%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
70-79%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
80-89%	*	*	-	-	*	-	*	-	*	-	-	*	-	*	*	*
	*	*	-	-	*	-	*	-	*	-	-	*	-	*	*	*
90-99%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
100%	3	2	1	-	3	-	-	3	-	3	2	2	-	-	-	3
	1%	1%	*	-	1%	-	-	1%	-	1%	1%	*	-	-	-	4%

## QES Q3 2014

## 6. What proportion of your company's employees working in the UK, if any, do you estimate are...

## Citizens from outside the UK / EU / EEA (e.g. America, China)

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EEA
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Nets</b>																
0-49%	498	230	263	86	378	35	117	381	149	350	109	368	22	490	110	61
	97%	96%	97%	99%	96%	100%	98%	96%	97%	96%	96%	96%	100%	97%	98%	77%
50% or more	18	10	8	1	16	-	3	15	4	13	4	14	*	15	2	18
	3%	4%	3%	1%	4%	-	2%	4%	3%	4%	4%	4%	*	3%	2%	23%
Any	78	51	26	25	42	11	44	34	33	45	26	51	2	75	44	78
	15%	21%	10%	29%	11%	32%	37%	9%	22%	12%	23%	13%	8%	15%	40%	100%
Median	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20
Mean Score	4.06	5.68	2.67	5.19	3.52	7.29	6.47	3.33	5.12	3.61	5.98	3.68	.82	3.55	7.46	26.69

## QES Q3 2014

## 7. For which of the following reasons, if any, do you employ...

## Summary table

Base: All who employ non-UK citizens

	EU / EEA citizens, excluding the UK	Citizens from outside the UK / EU / EEA
Unweighted Total	212	169
Weighted Total	112	78
	100%	100%
A short supply of UK applicants with required skills	30	18
	27%	23%
A short supply of UK applicants with required experience	26	15
	23%	20%
They are more productive than UK citizens	18	22
	16%	28%
They have a better work ethic than UK citizens	22	24
	20%	31%
For their foreign language skills	33	20
	29%	25%
Wanting to develop markets outside the UK	11	19
	10%	25%
Their innovative ideas	17	17
	15%	22%
Their positive influence on other workers' productivity levels	12	14
	11%	18%
They are cheaper to employ	5	9
	4%	11%
None of the above	44	23
	39%	29%

## QES Q3 2014

## 7. For which of the following reasons, if any, do you employ... EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

Base: All who employ EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	212	44	168	25	187	11	22	43	32	34	35	16	19
Weighted Total	112	83	29	16	96	5	14	29	6	35	6	10	7
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
For their foreign language skills	33	23	9	5	28	2	3	8	1	10	2	5	2
	29%	28%	32%	29%	29%	44%	19%	28%	20%	28%	34%	50%	24%
A short supply of UK applicants with required skills	30	21	10	3	28	1	3	10	2	5	3	5	1
	27%	25%	34%	18%	29%	18%	20%	33%	40%	15%	44%	54%	22%
A short supply of UK applicants with required experience	26	15	11	4	22	1	4	7	2	5	3	1	1
	23%	18%	37%	26%	23%	17%	30%	25%	40%	15%	48%	12%	23%
They have a better work ethic than UK citizens	22	17	5	6	16	4	2	7	1	4	2	1	*
	20%	20%	19%	34%	17%	79%	15%	24%	17%	12%	25%	12%	7%
They are more productive than UK citizens	18	13	5	4	14	2	4	6	*	4	1	1	*
	16%	16%	19%	26%	15%	39%	27%	20%	5%	12%	13%	10%	7%
Their innovative ideas	17	12	5	3	14	2	1	4	2	5	2	1	*
	15%	15%	17%	21%	14%	39%	11%	14%	29%	13%	26%	8%	7%
Their positive influence on other workers' productivity levels	12	6	6	4	8	2	2	4	1	*	*	2	1
	11%	8%	21%	23%	9%	41%	11%	15%	19%	1%	4%	17%	10%
Wanting to develop markets outside the UK	11	6	5	4	7	2	2	3	1	2	1	*	*
	10%	7%	19%	23%	8%	40%	11%	10%	18%	5%	23%	2%	3%
They are cheaper to employ	5	3	2	*	4	*	1	1	1	*	1	1	*
	4%	3%	7%	2%	5%	3%	7%	5%	15%	*	9%	5%	1%

## QES Q3 2014

## 7. For which of the following reasons, if any, do you employ... EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

Base: All who employ EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	212	44	168	25	187	11	22	43	32	34	35	16	19
Weighted Total	112	83	29	16	96	5	14	29	6	35	6	10	7
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	44	37	7	5	38	*	7	7	1	18	2	4	4
	39%	44%	24%	34%	40%	2%	47%	26%	24%	52%	26%	42%	67%

## QES Q3 2014

## 7. For which of the following reasons, if any, do you employ... EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

Base: All who employ EU / EEA citizens, excluding the UK (e.g. Germany, Norway)

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EEA
Unweighted Total	212	138	73	89	103	20	131	81	104	108	68	135	9	206	212	129
Weighted Total	112	63	48	40	56	16	44	68	38	73	37	73	2	103	112	44
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
For their foreign language skills	33	18	14	10	18	4	6	27	12	20	4	28	1	27	33	7
	29%	29%	30%	26%	32%	26%	13%	39%	32%	28%	11%	38%	24%	26%	29%	17%
A short supply of UK applicants with required skills	30	20	11	9	16	5	18	12	16	15	16	14	1	29	30	17
	27%	31%	22%	23%	29%	33%	41%	18%	40%	20%	43%	19%	51%	28%	27%	38%
A short supply of UK applicants with required experience	26	15	11	10	11	5	19	6	12	13	16	9	1	25	26	17
	23%	24%	22%	25%	19%	32%	44%	9%	32%	18%	42%	12%	47%	24%	23%	37%
They have a better work ethic than UK citizens	22	6	16	5	11	5	10	12	8	14	8	14	*	21	22	12
	20%	9%	34%	14%	20%	34%	22%	18%	20%	20%	21%	19%	12%	20%	20%	26%
They are more productive than UK citizens	18	5	13	6	7	5	10	8	5	13	7	11	*	18	18	11
	16%	9%	27%	15%	12%	34%	22%	13%	14%	18%	20%	15%	12%	18%	16%	25%
Their innovative ideas	17	7	10	6	10	1	8	9	8	9	3	13	1	17	17	8
	15%	11%	21%	16%	17%	7%	17%	14%	20%	13%	10%	18%	24%	16%	15%	18%
Their positive influence on other workers' productivity levels	12	5	7	7	5	*	7	5	7	5	4	8	1	12	12	6
	11%	8%	14%	17%	10%	2%	17%	7%	18%	7%	10%	11%	24%	12%	11%	15%
Wanting to develop markets outside the UK	11	6	6	6	5	*	7	4	4	7	2	9	*	11	11	7
	10%	9%	12%	15%	9%	1%	15%	6%	12%	9%	5%	12%	14%	11%	10%	16%
They are cheaper to employ	5	3	2	1	4	*	1	3	2	3	2	2	*	4	5	2
	4%	4%	4%	2%	6%	1%	3%	5%	5%	4%	6%	3%	2%	4%	4%	4%
None of the above	44	27	16	18	20	6	16	27	13	31	17	26	1	43	44	18
	39%	43%	33%	45%	36%	35%	37%	40%	33%	42%	46%	36%	42%	41%	39%	41%

## QES Q3 2014

## 7. For which of the following reasons, if any, do you employ... Citizens from outside the UK / EU / EEA (e.g. America, China)

Base: All who employ citizens from outside the UK / EU / EEA

	Business size		Industry										
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	169	39	130	12	157	3	15	31	31	30	35	12	12
Weighted Total	78	55	23	3	75	*	5	12	8	32	8	7	7
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
They have a better work ethic than UK citizens	24	20	4	2	22	-	2	3	2	12	2	2	1
	31%	36%	18%	48%	30%	-	44%	20%	26%	36%	27%	31%	20%
They are more productive than UK citizens	22	19	3	1	21	*	1	3	2	12	3	1	1
	28%	35%	12%	28%	28%	48%	16%	21%	21%	36%	35%	19%	20%
For their foreign language skills	20	14	6	*	20	-	1	6	2	10	1	*	*
	25%	25%	26%	7%	26%	-	10%	47%	26%	31%	13%	4%	6%
Wanting to develop markets outside the UK	19	12	7	1	18	*	1	4	1	10	1	1	*
	25%	23%	30%	40%	24%	48%	24%	36%	19%	30%	19%	16%	3%
A short supply of UK applicants with required skills	18	12	6	1	17	-	1	*	2	10	2	1	1
	23%	22%	25%	36%	23%	-	21%	3%	29%	30%	29%	19%	21%
Their innovative ideas	17	13	5	1	17	*	1	8	3	*	2	1	2
	22%	23%	21%	17%	22%	48%	14%	66%	39%	1%	26%	16%	32%
A short supply of UK applicants with required experience	15	10	5	1	14	*	1	*	1	9	1	*	1
	20%	18%	24%	39%	19%	48%	21%	3%	19%	29%	18%	3%	21%
Their positive influence on other workers' productivity levels	14	10	4	1	13	-	1	4	*	4	2	1	1
	18%	18%	19%	37%	17%	-	22%	36%	5%	12%	25%	11%	20%
They are cheaper to employ	9	5	3	1	8	-	1	2	1	4	1	1	-
	11%	10%	15%	18%	11%	-	11%	15%	15%	12%	7%	13%	-

## QES Q3 2014

## 7. For which of the following reasons, if any, do you employ... Citizens from outside the UK / EU / EEA (e.g. America, China)

Base: All who employ citizens from outside the UK / EU / EEA

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	169	39	130	12	157	3	15	31	31	30	35	12	12
Weighted Total	78	55	23	3	75	*	5	12	8	32	8	7	7
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
None of the above	23	17	6	*	23	*	1	2	3	7	2	4	3
	29%	30%	26%	4%	30%	52%	24%	13%	42%	22%	31%	64%	47%



## QES Q3 2014

## 7. For which of the following reasons, if any, do you employ... Citizens from outside the UK / EU / EEA (e.g. America, China)

Base: All who employ citizens from outside the UK / EU / EEA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/ EEA citizens	UK/ EU/ EEA
Unweighted Total	169	121	47	73	83	13	111	58	85	84	60	102	7	165	129	169
Weighted Total	78	51	26	25	42	11	44	34	33	45	26	51	2	75	44	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
They have a better work ethic than UK citizens	24 31%	12 24%	11 44%	7 29%	12 28%	5 43%	16 36%	8 23%	9 27%	15 33%	9 33%	15 30%	*	22 30%	12 28%	24 31%
They are more productive than UK citizens	22 28%	11 21%	12 44%	6 26%	11 26%	5 44%	16 35%	7 19%	9 26%	13 30%	6 25%	15 31%	*	22 29%	11 25%	22 28%
For their foreign language skills	20 25%	18 35%	2 8%	8 31%	11 26%	1 12%	12 27%	8 23%	9 28%	11 24%	6 23%	14 27%	*	20 26%	15 34%	20 25%
Wanting to develop markets outside the UK	19 25%	8 17%	11 41%	8 31%	12 28%	-	9 20%	10 31%	6 17%	14 30%	2 7%	18 35%	*	19 25%	10 23%	19 25%
A short supply of UK applicants with required skills	18 23%	9 17%	9 35%	7 26%	7 18%	4 38%	17 37%	2 5%	10 29%	8 19%	10 38%	8 16%	*	18 24%	8 19%	18 23%
Their innovative ideas	17 22%	10 20%	7 27%	6 23%	11 26%	1 7%	11 25%	6 18%	5 16%	12 27%	8 29%	9 19%	*	15 20%	12 27%	17 22%
A short supply of UK applicants with required experience	15 20%	7 13%	9 33%	5 20%	6 14%	4 38%	14 33%	1 3%	9 26%	7 15%	9 33%	7 13%	*	15 21%	8 18%	15 20%
Their positive influence on other workers' productivity levels	14 18%	4 8%	10 37%	7 28%	7 16%	*	11 25%	3 9%	9 27%	5 11%	2 8%	12 24%	-	13 18%	7 16%	14 18%
They are cheaper to employ	9 11%	5 10%	4 13%	2 8%	7 16%	*	3 8%	5 16%	4 13%	5 10%	2 6%	7 14%	*	9 12%	4 10%	9 11%
None of the above	23 29%	18 36%	4 13%	6 23%	12 28%	6 50%	8 19%	15 43%	10 31%	13 28%	8 32%	14 27%	1	22 30%	13 30%	23 29%

## QES Q3 2014

## 8. Which of the following types of citizens from outside the UK / EU / EEA, if any, have you employed?

Base: All who employ citizens from outside the UK / EU / EEA

	Business size		Industry										
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	169	39	130	12	157	3	15	31	31	30	35	12	12
Weighted Total	78	55	23	3	75	*	5	12	8	32	8	7	7
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A worker who holds leave to remain in the UK	36	26	10	1	35	-	3	10	4	10	5	2	3
	46%	47%	43%	39%	46%	-	48%	79%	58%	31%	63%	27%	41%
A worker on a 'family of a settled person' visa	17	12	5	1	16	*	1	1	2	9	1	4	-
	21%	22%	20%	24%	21%	48%	12%	6%	20%	29%	7%	56%	-
A worker on a tier 2 (general) visa	9	4	5	*	9	-	*	*	1	6	1	1	-
	12%	8%	22%	4%	12%	-	7%	2%	10%	18%	19%	11%	-
A worker on a tier 5 (temporary worker) visa	9	5	4	1	7	*	2	2	*	4	*	1	*
	11%	9%	17%	44%	10%	29%	29%	12%	2%	13%	3%	12%	3%
A worker on a tier 2 (intra-company transfer) visa	8	5	3	*	7	*	*	4	1	1	1	1	-
	10%	9%	12%	11%	10%	48%	4%	31%	14%	2%	14%	11%	-
Other	7	7	*	-	7	-	-	*	*	4	1	1	1
	9%	12%	2%	-	9%	-	-	*	1%	13%	11%	16%	15%
Don't know	16	10	6	1	15	*	2	1	2	7	2	*	3
	21%	19%	26%	33%	20%	23%	34%	5%	22%	22%	21%	2%	44%

## QES Q3 2014

## 8. Which of the following types of citizens from outside the UK / EU / EEA, if any, have you employed?

Base: All who employ citizens from outside the UK / EU / EEA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EEA
Unweighted Total	169	121	47	73	83	13	111	58	85	84	60	102	7	165	129	169
Weighted Total	78	51	26	25	42	11	44	34	33	45	26	51	2	75	44	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A worker who holds leave to remain in the UK	36	22	14	10	21	5	21	15	10	25	16	20	*	35	22	36
	46%	42%	54%	38%	50%	46%	47%	44%	31%	56%	61%	39%	6%	46%	50%	46%
A worker on a 'family of a settled person' visa	17	16	1	11	5	1	12	5	10	7	1	15	*	17	13	17
	21%	31%	4%	42%	13%	7%	27%	14%	30%	15%	5%	30%	2%	22%	29%	21%
A worker on a tier 2 (general) visa	9	4	5	2	7	*	7	2	8	2	2	7	*	9	4	9
	12%	8%	19%	8%	16%	2%	17%	5%	23%	3%	8%	14%	6%	12%	9%	12%
A worker on a tier 5 (temporary worker) visa	9	2	7	3	2	4	8	*	3	5	6	2	*	9	9	9
	11%	4%	25%	11%	4%	37%	19%	1%	10%	12%	24%	4%	20%	11%	20%	11%
A worker on a tier 2 (intra-company transfer) visa	8	7	1	3	5	*	6	2	3	5	5	2	*	8	7	8
	10%	13%	4%	10%	12%	1%	14%	5%	8%	11%	21%	4%	6%	10%	16%	10%
Other	7	3	4	2	5	-	2	5	2	5	1	6	*	7	*	7
	9%	5%	16%	9%	12%	-	5%	14%	7%	11%	5%	12%	2%	9%	1%	9%
Don't know	16	13	2	2	8	6	4	12	5	11	7	8	1	15	8	16
	21%	25%	9%	10%	18%	54%	9%	35%	15%	25%	27%	15%	72%	19%	19%	21%

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

## Summary table

Base: All who have employed workers from outside the UK/EU/EEA

	Total	Lack of information available about the relevant employment procedures	Lack of clarity on procedures for different categories of workers	Uncertainty due to frequent changes to immigration law	Length of the application process	Costs of compliance with immigration law	The strict nature of the rules	Uncertainty about eligibility	The complexity of the tax system	I haven't encountered any problems	Don't know
A worker on a tier 2 (general) visa	9 100%	* 5%	1 7%	1 15%	5 52%	5 52%	5 59%	4 49%	* 5%	2 22%	1 7%
A worker on a tier 2 (intra-company transfer) visa	8 100%	1 12%	1 15%	1 10%	3 33%	2 24%	2 32%	1 20%	5 64%	* 6%	* 4%
A worker on a tier 5 (temporary worker) visa	9 100%	2 25%	6 69%	5 61%	* 2%	5 59%	1 10%	6 71%	5 62%	- -	1 7%
A worker who holds leave to remain in the UK	36 100%	2 6%	5 14%	10 28%	3 8%	8 24%	3 7%	6 18%	6 18%	18 51%	3 8%
A worker on a 'family of a settled person' visa	17 100%	* 1%	* 3%	* 2%	1 4%	1 4%	* 2%	1 4%	* 2%	14 84%	1 3%
Any worker	55 100%	4 8%	8 14%	12 21%	9 16%	15 27%	9 17%	12 22%	12 21%	29 53%	4 7%

## QES Q3 2014

**9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?**

**A worker on a tier 2 (general) visa**

Base: All who have employed a worker on a tier 2 (general) visa from outside the UK/EU/EAA

	Business size		Industry										
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	36	2	34	1	35	-	2	3	7	10	12	2	-
Weighted Total	9	4	5	*	9	-	*	*	1	6	1	1	-
	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	-
The strict nature of the rules	5	4	1	-	5	-	-	-	*	4	1	1	-
	59%	100%	24%	-	60%	-	-	-	38%	67%	48%	89%	-
Length of the application process	5	4	1	-	5	-	-	*	*	4	1	-	-
	52%	100%	11%	-	53%	-	-	28%	32%	67%	47%	-	-
Costs of compliance with immigration law	5	4	1	-	5	-	-	-	*	4	*	1	-
	52%	87%	21%	-	52%	-	-	-	25%	67%	8%	89%	-
Uncertainty about eligibility	4	4	1	-	4	-	-	-	-	4	*	1	-
	49%	87%	16%	-	50%	-	-	-	-	65%	11%	89%	-
Uncertainty due to frequent changes to immigration law	1	-	1	-	1	-	*	*	-	*	*	1	-
	15%	-	27%	-	15%	-	60%	28%	-	2%	26%	89%	-
Lack of clarity on procedures for different categories of workers	1	-	1	*	*	-	*	-	-	*	*	*	-
	7%	-	12%	100%	5%	-	100%	-	-	1%	8%	11%	-
Lack of information available about the relevant employment procedures	*	-	*	-	*	-	*	-	*	*	*	-	-
	5%	-	10%	-	5%	-	60%	-	7%	1%	11%	-	-
The complexity of the tax system	*	-	*	-	*	-	*	-	-	*	*	-	-
	5%	-	9%	-	5%	-	60%	-	-	3%	5%	-	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 2 (general) visa**

Base: All who have employed a worker on a tier 2 (general) visa from outside the UK/EU/EEA

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	36	2	34	1	35	-	2	3	7	10	12	2	-
Weighted Total	9	4	5	*	9	-	*	*	1	6	1	1	-
	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	-
I haven't encountered any problems	2	-	2	-	2	-	-	*	*	1	*	-	-
	22%	-	40%	-	22%	-	-	43%	30%	25%	17%	-	-
Don't know	1	-	1	-	1	-	-	-	*	*	*	-	-
	7%	-	14%	-	7%	-	-	-	25%	5%	15%	-	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 2 (general) visa**

Base: All who have employed a worker on a tier 2 (general) visa from outside the UK/EU/EAA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total	36	29	7	17	17	2	30	6	21	15	16	19	1	36	32	36
Weighted Total	9	4	5	2	7	*	7	2	8	2	2	7	*	9	4	9
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The strict nature of the rules	5	1	4	1	4	-	5	-	5	*	1	4	-	5	2	5
	59%	26%	87%	46%	65%	-	74%	-	69%	11%	47%	63%	-	59%	43%	59%
Length of the application process	5	1	4	*	4	-	5	*	5	*	*	4	-	5	1	5
	52%	25%	75%	17%	65%	-	64%	5%	60%	14%	22%	61%	-	52%	27%	52%
Costs of compliance with immigration law	5	*	4	1	4	-	5	-	5	*	1	4	-	5	1	5
	52%	10%	87%	46%	55%	-	65%	-	60%	9%	47%	54%	-	52%	26%	52%
Uncertainty about eligibility	4	*	4	1	4	-	4	-	4	*	1	4	-	4	1	4
	49%	4%	87%	32%	55%	-	61%	-	58%	5%	37%	53%	-	49%	19%	49%
Uncertainty due to frequent changes to immigration law	1	1	1	1	*	-	1	*	1	*	1	*	-	1	1	1
	15%	17%	12%	41%	7%	-	15%	14%	15%	11%	54%	4%	-	15%	34%	15%
Lack of clarity on procedures for different categories of workers	1	*	*	*	*	-	1	-	*	*	1	*	-	1	1	1
	7%	9%	4%	11%	5%	-	8%	-	4%	18%	27%	1%	-	7%	15%	7%
Lack of information available about the relevant employment procedures	*	*	-	*	*	-	*	-	*	*	*	*	-	*	*	*
	5%	12%	-	10%	4%	-	7%	-	5%	5%	22%	1%	-	5%	12%	5%
The complexity of the tax system	*	*	-	*	*	-	*	*	*	*	*	*	-	*	*	*
	5%	11%	-	11%	3%	-	5%	5%	4%	11%	17%	2%	-	5%	11%	5%
I haven't encountered any problems	2	2	*	*	2	*	1	1	1	1	*	2	-	2	1	2
	22%	43%	4%	9%	25%	50%	9%	71%	18%	37%	15%	24%	-	22%	13%	22%
Don't know	1	*	*	*	*	*	*	*	*	*	*	1	*	1	1	1
	7%	12%	4%	19%	3%	50%	6%	15%	3%	26%	2%	8%	100%	7%	17%	7%

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 2 (intra-company transfer) visa**

Base: All who have employed a worker on a tier 2 (intra-company transfer) visa from outside the UK/EU/EEA

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	29	3	26	3	26	1	2	3	6	6	9	2	-
Weighted Total	8	5	3	*	7	*	*	4	1	1	1	1	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-
The complexity of the tax system	5	5	*	-	5	-	-	4	1	-	1	-	-
	64%	100%	4%	-	67%	-	-	96%	61%	-	61%	-	-
Length of the application process	3	1	1	*	2	*	-	*	1	*	1	1	-
	33%	25%	48%	31%	34%	100%	-	1%	79%	24%	71%	89%	-
The strict nature of the rules	2	1	1	-	2	-	-	*	1	*	1	1	-
	32%	25%	45%	-	34%	-	-	3%	79%	13%	76%	89%	-
Costs of compliance with immigration law	2	1	1	-	2	-	-	-	1	*	1	-	-
	24%	25%	24%	-	26%	-	-	-	79%	47%	64%	-	-
Uncertainty about eligibility	1	1	1	*	1	*	-	-	*	-	1	1	-
	20%	11%	34%	31%	19%	100%	-	-	8%	-	64%	89%	-
Lack of clarity on procedures for different categories of workers	1	1	1	*	1	-	*	-	*	*	1	-	-
	15%	11%	20%	41%	13%	-	60%	-	8%	24%	68%	-	-
Lack of information available about the relevant employment procedures	1	1	*	-	1	-	-	-	*	-	1	*	-
	12%	11%	13%	-	12%	-	-	-	5%	-	72%	11%	-
Uncertainty due to frequent changes to immigration law	1	1	*	-	1	-	-	-	-	-	1	-	-
	10%	11%	7%	-	10%	-	-	-	-	-	69%	-	-



## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 2 (intra-company transfer) visa**

Base: All who have employed a worker on a tier 2 (intra-company transfer) visa from outside the UK/EU/EEA

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	29	3	26	3	26	1	2	3	6	6	9	2	-
Weighted Total	8	5	3	*	7	*	*	4	1	1	1	1	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-
I haven't encountered any problems	*	-	*	*	*	-	*	-	*	*	-	-	-
	6%	-	16%	28%	5%	-	40%	-	9%	39%	-	-	-
Don't know	*	-	*	-	*	-	-	-	-	*	*	-	-
	4%	-	11%	-	4%	-	-	-	-	14%	21%	-	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 2 (intra-company transfer) visa**

Base: All who have employed a worker on a tier 2 (intra-company transfer) visa from outside the UK/EU/EEA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EEA
Unweighted Total	29	24	5	18	10	1	24	5	19	10	15	13	1	29	28	29
Weighted Total	8	7	1	3	5	*	6	2	3	5	5	2	*	8	7	8
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The complexity of the tax system	5	5	-	1	4	-	4	1	1	4	4	1	-	5	4	5
	64%	74%	-	25%	85%	-	61%	77%	22%	87%	69%	57%	-	64%	61%	64%
Length of the application process	3	2	1	2	1	-	1	1	2	1	1	1	-	3	2	3
	33%	27%	78%	72%	15%	-	22%	77%	60%	20%	22%	62%	-	33%	27%	33%
The strict nature of the rules	2	2	1	2	1	-	1	1	2	1	1	1	-	2	2	2
	32%	28%	63%	67%	15%	-	19%	83%	59%	18%	19%	65%	-	32%	26%	32%
Costs of compliance with immigration law	2	2	-	1	1	-	1	1	1	1	1	1	-	2	1	2
	24%	28%	-	48%	13%	-	10%	83%	33%	20%	11%	57%	-	24%	17%	24%
Uncertainty about eligibility	1	1	1	1	*	-	1	1	1	*	1	1	-	1	1	1
	20%	12%	73%	56%	2%	-	16%	34%	48%	5%	13%	36%	-	20%	21%	20%
Lack of clarity on procedures for different categories of workers	1	1	*	1	*	-	1	1	1	1	*	1	-	1	1	1
	15%	15%	14%	41%	2%	-	10%	34%	22%	11%	8%	31%	-	15%	16%	15%
Lack of information available about the relevant employment procedures	1	1	*	1	*	-	*	1	1	*	*	1	-	1	1	1
	12%	12%	8%	29%	3%	-	6%	34%	28%	3%	5%	29%	-	12%	13%	12%
Uncertainty due to frequent changes to immigration law	1	1	-	1	*	-	*	1	1	*	*	1	-	1	1	1
	10%	11%	-	26%	2%	-	3%	34%	25%	2%	3%	26%	-	10%	10%	10%
I haven't encountered any problems	*	*	-	*	*	-	*	-	*	*	*	*	-	*	*	*
	6%	7%	-	4%	7%	-	8%	-	16%	1%	1%	19%	-	6%	7%	6%
Don't know	*	*	-	*	*	*	*	*	*	*	*	*	*	*	*	*
	4%	5%	-	2%	3%	100%	1%	17%	10%	1%	1%	8%	100%	4%	4%	4%

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 5 (temporary worker) visa**

Base: All who have employed a worker on a tier 5 (temporary worker) visa from outside the UK/EU/EEA

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	23	2	21	4	19	1	4	5	3	2	4	3	1
Weighted Total	9	5	4	1	7	*	2	2	*	4	*	1	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Uncertainty about eligibility	6	4	2	1	5	-	1	*	*	4	*	1	*
	71%	87%	53%	74%	71%	-	67%	6%	25%	98%	19%	82%	100%
Lack of clarity on procedures for different categories of workers	6	4	2	-	6	-	*	1	-	4	*	1	*
	69%	87%	47%	-	82%	-	14%	40%	-	98%	57%	90%	100%
The complexity of the tax system	5	4	1	*	5	-	1	-	*	4	*	1	-
	62%	87%	32%	21%	70%	-	33%	-	50%	98%	19%	82%	-
Uncertainty due to frequent changes to immigration law	5	4	1	-	5	-	*	*	-	4	*	1	-
	61%	87%	30%	-	73%	-	14%	11%	-	98%	43%	92%	-
Costs of compliance with immigration law	5	4	1	-	5	-	-	*	*	4	*	1	-
	59%	87%	24%	-	70%	-	-	5%	75%	98%	19%	90%	-
Lack of information available about the relevant employment procedures	2	-	2	1	1	*	1	-	-	*	*	1	*
	25%	-	55%	69%	16%	100%	72%	-	-	2%	43%	82%	100%
The strict nature of the rules	1	-	1	-	1	-	-	1	-	-	*	*	-
	10%	-	23%	-	12%	-	-	46%	-	-	62%	8%	-
Length of the application process	*	-	*	-	*	-	-	*	*	-	*	-	-
	2%	-	5%	-	3%	-	-	5%	50%	-	19%	-	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 5 (temporary worker) visa**

Base: All who have employed a worker on a tier 5 (temporary worker) visa from outside the UK/EU/EEA

	Business size			Industry									
	1-9	10+		Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	23	2	21	4	19	1	4	5	3	2	4	3	1
Weighted Total	9	5	4	1	7	*	2	2	*	4	*	1	*
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
I haven't encountered any problems	-	-	-	-	-	-	-	-	-	-	-	-	-
Don't know	1	1	-	-	1	-	-	1	-	-	-	-	-
	7%	13%	-	-	9%	-	-	42%	-	-	-	-	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a tier 5 (temporary worker) visa**

Base: All who have employed a worker on a tier 5 (temporary worker) visa from outside the UK/EU/EEA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EEA
Unweighted Total	23	12	11	10	11	2	19	4	18	5	11	10	2	23	23	23
Weighted Total	9	2	7	3	2	4	8	*	3	5	6	2	*	9	9	9
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Uncertainty about eligibility	6	1	5	2	-	4	6	-	2	4	5	1	-	6	6	6
	71%	61%	75%	74%	-	98%	73%	-	56%	81%	83%	48%	-	71%	71%	71%
Lack of clarity on procedures for different categories of workers	6	1	5	1	*	4	6	*	2	4	5	1	-	6	6	6
	69%	25%	83%	53%	21%	98%	70%	24%	52%	80%	83%	36%	-	69%	69%	69%
The complexity of the tax system	5	1	5	1	1	4	5	*	1	4	5	*	*	5	5	5
	62%	30%	73%	24%	35%	98%	63%	34%	28%	84%	80%	4%	88%	62%	62%	62%
Uncertainty due to frequent changes to immigration law	5	*	5	1	*	4	5	-	1	4	5	*	-	5	5	5
	61%	14%	76%	26%	22%	100%	63%	-	34%	78%	83%	6%	-	61%	61%	61%
Costs of compliance with immigration law	5	*	5	1	*	4	5	*	1	4	5	*	*	5	5	5
	59%	6%	75%	24%	11%	100%	58%	74%	26%	80%	78%	7%	12%	59%	59%	59%
Lack of information available about the relevant employment procedures	2	1	1	2	*	-	2	*	2	-	1	1	-	2	2	2
	25%	70%	10%	68%	16%	-	25%	26%	64%	-	18%	49%	-	25%	25%	25%
The strict nature of the rules	1	*	1	1	*	-	1	*	1	*	*	1	-	1	1	1
	10%	6%	11%	25%	11%	-	10%	24%	24%	1%	1%	41%	-	10%	10%	10%
Length of the application process	*	*	*	*	*	*	*	*	*	-	*	*	-	*	*	*
	2%	6%	1%	1%	5%	2%	1%	34%	6%	-	2%	4%	-	2%	2%	2%
I haven't encountered any problems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Don't know	1	-	1	-	1	-	1	-	-	1	1	-	-	1	1	1
	7%	-	10%	-	38%	-	8%	-	-	12%	10%	-	-	7%	7%	7%

## QES Q3 2014

**9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?**

**A worker who holds leave to remain in the UK**

Base: All who have employed a worker who holds leave to remain in the UK from outside the UK/EU/EEA

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	85	21	64	4	81	-	8	18	15	11	19	7	7
Weighted Total	36	26	10	1	35	-	3	10	4	10	5	2	3
	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
Uncertainty due to frequent changes to immigration law	10	8	2	1	9	-	1	4	*	4	1	*	-
	28%	32%	19%	74%	27%	-	38%	42%	2%	44%	16%	3%	-
Costs of compliance with immigration law	8	7	1	1	8	-	1	1	1	4	1	*	-
	24%	27%	14%	74%	22%	-	35%	12%	31%	43%	15%	3%	-
The complexity of the tax system	6	5	2	1	6	-	1	*	-	4	1	1	-
	18%	18%	17%	74%	16%	-	35%	1%	-	43%	11%	35%	-
Uncertainty about eligibility	6	5	1	*	6	-	*	*	-	4	1	1	-
	18%	20%	12%	8%	18%	-	4%	1%	-	45%	23%	37%	-
Lack of clarity on procedures for different categories of workers	5	5	*	-	5	-	-	-	-	4	1	*	-
	14%	18%	2%	-	14%	-	-	-	-	44%	11%	3%	-
Length of the application process	3	2	1	-	3	-	-	1	-	*	1	1	-
	8%	6%	11%	-	8%	-	-	12%	-	1%	16%	37%	-
The strict nature of the rules	3	2	1	-	3	-	-	1	-	*	1	1	-
	7%	6%	11%	-	8%	-	-	13%	-	1%	12%	42%	-
Lack of information available about the relevant employment procedures	2	2	*	-	2	-	-	*	1	-	1	*	-
	6%	7%	1%	-	6%	-	-	*	31%	-	12%	3%	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker who holds leave to remain in the UK**

Base: All who have employed a worker who holds leave to remain in the UK from outside the UK/EU/EEA

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	85	21	64	4	81	-	8	18	15	11	19	7	7
Weighted Total	36	26	10	1	35	-	3	10	4	10	5	2	3
	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%
I haven't encountered any problems	18	13	5	*	18	-	1	4	1	5	3	*	3
	51%	51%	51%	19%	52%	-	50%	45%	31%	51%	67%	22%	100%
Don't know	3	1	1	-	3	-	*	-	2	*	*	1	-
	8%	5%	14%	-	8%	-	8%	-	36%	1%	4%	37%	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker who holds leave to remain in the UK**

Base: All who have employed a worker who holds leave to remain in the UK from outside the UK/EU/EEA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EEA
Unweighted Total	85	59	26	39	39	7	58	27	43	42	39	45	1	84	67	85
Weighted Total	36	22	14	10	21	5	21	15	10	25	16	20	*	35	22	36
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Uncertainty due to frequent changes to immigration law	10	6	4	2	4	4	9	1	2	8	9	2	-	10	10	10
	28%	26%	32%	20%	19%	82%	45%	5%	19%	32%	53%	8%	-	29%	45%	28%
Costs of compliance with immigration law	8	3	5	2	2	4	6	2	4	4	5	3	-	8	8	8
	24%	14%	39%	24%	9%	82%	30%	15%	40%	17%	32%	17%	-	24%	35%	24%
The complexity of the tax system	6	2	5	2	*	4	6	1	2	4	5	2	-	6	6	6
	18%	7%	35%	23%	*	80%	28%	4%	20%	17%	30%	8%	-	18%	29%	18%
Uncertainty about eligibility	6	1	5	1	1	4	6	1	1	5	5	1	-	6	6	6
	18%	4%	39%	15%	4%	80%	27%	5%	14%	19%	32%	6%	-	18%	26%	18%
Lack of clarity on procedures for different categories of workers	5	1	4	1	-	4	4	1	1	4	4	1	-	5	5	5
	14%	3%	29%	8%	-	80%	20%	4%	5%	17%	27%	3%	-	14%	22%	14%
Length of the application process	3	1	2	1	1	*	1	2	3	*	1	2	-	3	3	3
	8%	4%	14%	15%	6%	2%	5%	11%	25%	1%	7%	8%	-	8%	12%	8%
The strict nature of the rules	3	1	2	1	1	-	1	2	2	*	1	2	-	3	3	3
	7%	3%	14%	15%	6%	-	5%	11%	22%	1%	5%	9%	-	8%	12%	7%
Lack of information available about the relevant employment procedures	2	2	-	1	1	-	1	1	2	*	1	1	-	2	1	2
	6%	9%	-	14%	3%	-	4%	8%	19%	*	4%	7%	-	6%	6%	6%
I haven't encountered any problems	18	12	6	4	13	1	7	11	3	15	5	13	-	17	8	18
	51%	56%	45%	44%	63%	15%	34%	76%	30%	60%	30%	69%	-	50%	37%	51%
Don't know	3	2	1	1	1	*	2	1	2	1	1	2	*	3	*	3
	8%	9%	5%	15%	5%	3%	8%	7%	17%	4%	5%	9%	100%	8%	2%	8%



## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a 'family of a settled person' visa**

Base: All who have employed a worker on a 'family of a settled person' visa from outside the UK/EU/EAA

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	40	4	36	5	35	1	4	8	10	7	6	4	-
Weighted Total	17	12	5	1	16	*	1	1	2	9	1	4	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-
Length of the application process	1	-	1	*	*	*	*	*	-	*	*	*	-
	4%	-	14%	43%	2%	100%	34%	24%	-	1%	7%	1%	-
Costs of compliance with immigration law	1	-	1	*	*	-	*	*	*	*	*	*	-
	4%	-	14%	39%	2%	-	45%	13%	3%	1%	7%	3%	-
Uncertainty about eligibility	1	-	1	-	1	-	-	*	-	-	*	*	-
	4%	-	13%	-	4%	-	-	59%	-	-	20%	1%	-
Lack of clarity on procedures for different categories of workers	*	-	*	*	*	*	-	-	*	*	*	*	-
	3%	-	9%	14%	2%	100%	-	-	6%	1%	20%	1%	-
Uncertainty due to frequent changes to immigration law	*	-	*	*	*	*	-	-	-	-	*	*	-
	2%	-	8%	14%	2%	100%	-	-	-	-	37%	1%	-
The complexity of the tax system	*	-	*	*	*	*	-	*	-	*	*	*	-
	2%	-	7%	14%	1%	100%	-	5%	-	1%	7%	2%	-
The strict nature of the rules	*	-	*	*	*	*	*	*	-	-	*	*	-
	2%	-	7%	18%	1%	-	21%	5%	-	-	7%	3%	-
Lack of information available about the relevant employment procedures	*	-	*	-	*	-	-	-	-	-	*	*	-
	1%	-	2%	-	1%	-	-	-	-	-	7%	1%	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a 'family of a settled person' visa**

Base: All who have employed a worker on a 'family of a settled person' visa from outside the UK/EU/EAA

	Business size		Industry										
	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	40	4	36	5	35	1	4	8	10	7	6	4	-
Weighted Total	17	12	5	1	16	*	1	1	2	9	1	4	-
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-
I haven't encountered any problems	14	12	2	-	14	-	-	*	1	9	*	4	-
	84%	100%	41%	-	88%	-	-	17%	68%	99%	7%	95%	-
Don't know	1	-	1	-	1	-	-	-	*	-	*	-	-
	3%	-	11%	-	3%	-	-	-	24%	-	30%	-	-

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**A worker on a 'family of a settled person' visa**

Base: All who have employed a worker on a 'family of a settled person' visa from outside the UK/EU/EEA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EEA
Unweighted Total	40	28	12	21	16	3	34	6	26	14	16	23	1	40	39	40
Weighted Total	17	16	1	11	5	1	12	5	10	7	1	15	*	17	13	17
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Length of the application process	1	*	*	1	*	-	1	-	*	*	*	*	-	1	1	1
	4%	2%	38%	5%	3%	-	6%	-	4%	4%	17%	3%	-	4%	5%	4%
Costs of compliance with immigration law	1	1	*	*	*	-	1	*	*	*	*	*	*	1	1	1
	4%	3%	15%	2%	8%	-	5%	2%	2%	6%	16%	3%	100%	4%	5%	4%
Uncertainty about eligibility	1	*	*	*	*	-	1	-	*	*	*	*	-	1	1	1
	4%	3%	14%	4%	4%	-	5%	-	5%	2%	13%	3%	-	4%	5%	4%
Lack of clarity on procedures for different categories of workers	*	*	*	*	*	-	*	-	*	*	*	*	-	*	*	*
	3%	2%	10%	2%	3%	-	4%	-	2%	3%	13%	2%	-	3%	3%	3%
Uncertainty due to frequent changes to immigration law	*	*	*	*	*	-	*	*	*	*	*	*	-	*	*	*
	2%	2%	10%	2%	3%	-	2%	4%	3%	1%	7%	2%	-	2%	3%	2%
The complexity of the tax system	*	*	*	*	*	-	*	-	*	*	*	*	-	*	*	*
	2%	1%	18%	2%	1%	-	3%	-	3%	1%	9%	1%	-	2%	3%	2%
The strict nature of the rules	*	*	*	*	*	-	*	*	*	*	*	*	-	*	*	*
	2%	1%	10%	2%	2%	-	2%	1%	2%	2%	17%	1%	-	2%	2%	2%
Lack of information available about the relevant employment procedures	*	*	-	*	-	-	*	-	*	*	*	-	-	*	*	*
	1%	1%	-	1%	-	-	1%	-	*	1%	7%	-	-	1%	1%	1%
I haven't encountered any problems	14	14	*	9	4	1	10	4	8	6	*	14	-	14	10	14
	84%	87%	28%	87%	75%	100%	81%	91%	81%	88%	22%	89%	-	84%	79%	84%
Don't know	1	*	*	*	*	-	*	*	1	-	*	*	-	1	1	1
	3%	3%	8%	3%	5%	-	3%	4%	5%	-	22%	2%	-	3%	4%	3%

## QES Q3 2014

**9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?**

**Any worker**

Base: All who have employed any worker from outside the UK/EU/EAA

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	127	26	101	9	118	2	12	26	25	20	26	9	7
Weighted Total	55	39	17	2	53	*	4	12	6	21	5	5	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Costs of compliance with immigration law	15	11	3	1	14	-	1	1	2	8	1	1	-
	27%	30%	19%	56%	25%	-	34%	11%	40%	40%	17%	14%	-
Uncertainty about eligibility	12	9	3	1	11	*	1	1	*	8	1	1	*
	22%	23%	20%	58%	21%	62%	32%	6%	2%	39%	24%	12%	7%
The complexity of the tax system	12	9	3	1	10	*	1	4	1	4	1	1	-
	21%	23%	17%	61%	20%	62%	40%	33%	13%	21%	13%	13%	-
Uncertainty due to frequent changes to immigration law	12	8	3	1	11	*	1	4	*	4	1	1	-
	21%	22%	19%	47%	20%	62%	34%	35%	1%	21%	20%	14%	-
The strict nature of the rules	9	7	3	*	9	-	*	2	1	4	1	1	-
	17%	17%	16%	6%	17%	-	4%	18%	17%	19%	25%	15%	-
Length of the application process	9	7	3	*	9	*	*	1	1	4	2	1	-
	16%	17%	15%	16%	16%	62%	7%	12%	17%	19%	29%	12%	-
Lack of clarity on procedures for different categories of workers	8	5	3	*	7	*	*	1	*	4	1	1	*
	14%	12%	17%	11%	14%	62%	10%	5%	3%	22%	15%	15%	7%
Lack of information available about the relevant employment procedures	4	2	3	1	3	*	1	*	1	*	1	1	*
	8%	5%	15%	45%	6%	38%	32%	*	24%	*	14%	14%	7%

## QES Q3 2014

9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?

**Any worker**

Base: All who have employed any worker from outside the UK/EU/EEA

	Business size			Industry									
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services
Unweighted Total	127	26	101	9	118	2	12	26	25	20	26	9	7
Weighted Total	55	39	17	2	53	*	4	12	6	21	5	5	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
I haven't encountered any problems	29	21	8	*	29	-	1	4	2	12	3	4	3
	53%	54%	50%	11%	55%	-	36%	38%	26%	58%	65%	73%	100%
Don't know	4	2	2	-	4	-	*	1	2	*	*	1	-
	7%	5%	12%	-	7%	-	6%	6%	33%	1%	4%	12%	-

## QES Q3 2014

**9. When recruiting non-UK and non-EU / EEA nationals, which of the following problems, if any, have you encountered with the process for dealing with workers on each of the following types of visas?**

**Any worker**

Base: All who have employed any worker from outside the UK/EU/EEA

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EEA
Unweighted Total	127	89	38	56	63	8	93	34	69	58	51	73	3	126	104	127
Weighted Total	55	36	20	21	29	5	38	17	26	29	18	37	*	54	36	55
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Costs of compliance with immigration law	15	5	10	4	7	4	12	3	9	6	6	8	*	15	9	15
	27%	13%	50%	18%	23%	81%	30%	19%	35%	19%	36%	22%	9%	27%	27%	27%
Uncertainty about eligibility	12	3	10	3	5	4	12	1	7	5	6	7	-	12	8	12
	22%	8%	49%	16%	16%	79%	30%	4%	27%	18%	31%	18%	-	23%	23%	22%
The complexity of the tax system	12	7	5	3	5	4	10	1	3	9	9	3	*	12	11	12
	21%	19%	26%	12%	17%	79%	27%	8%	10%	31%	50%	7%	69%	22%	31%	21%
Uncertainty due to frequent changes to immigration law	12	6	5	3	5	4	11	1	3	8	10	2	-	12	11	12
	21%	18%	27%	13%	16%	81%	28%	5%	13%	28%	54%	5%	-	21%	32%	21%
The strict nature of the rules	9	3	6	3	7	-	7	3	8	1	1	8	-	9	5	9
	17%	8%	33%	13%	22%	-	18%	15%	30%	5%	8%	21%	-	17%	13%	17%
Length of the application process	9	3	6	2	7	*	7	2	8	1	2	7	-	9	4	9
	16%	8%	31%	12%	22%	2%	17%	14%	29%	5%	10%	20%	-	17%	13%	16%
Lack of clarity on procedures for different categories of workers	8	2	6	3	1	4	7	1	2	5	6	2	-	8	8	8
	14%	5%	29%	13%	2%	79%	18%	4%	9%	17%	33%	4%	-	14%	21%	14%
Lack of information available about the relevant employment procedures	4	4	1	3	1	-	3	1	4	*	2	2	-	4	4	4
	8%	10%	4%	16%	4%	-	8%	7%	16%	1%	12%	6%	-	8%	10%	8%
I haven't encountered any problems	29	23	6	13	15	1	17	13	13	17	5	24	-	28	18	29
	53%	65%	32%	64%	52%	16%	44%	74%	48%	57%	29%	65%	-	52%	50%	53%
Don't know	4	2	2	2	2	*	3	1	2	2	2	2	*	4	2	4
	7%	7%	8%	10%	6%	3%	8%	6%	7%	7%	9%	6%	22%	7%	5%	7%

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

## Summary table

Base: All respondents

							Nets		Mean score	
	Total	5 High negative impact	4	3	2	1 No Negative impact	Don't know	High negative impact		Low negative impact
Stricter rules for Student visas introduced in 2011 (e.g. restrictions on work placements and post-study work)	516 100%	30 6%	59 11%	93 18%	33 6%	119 23%	182 35%	89 17%	152 29%	2.54
Stricter eligibility requirements for Entrepreneur visas (e.g. requiring access to a high amount of investment funds)	516 100%	42 8%	75 15%	85 16%	23 4%	103 20%	188 36%	118 23%	126 24%	2.79
The complexity and cost of the application process for General Visitor (tourist) visas	516 100%	44 8%	63 12%	91 18%	24 5%	108 21%	186 36%	107 21%	132 26%	2.73
The complexity and cost of the application process for Business Visitor visas	516 100%	57 11%	54 10%	98 19%	22 4%	84 16%	200 39%	111 22%	107 21%	2.93

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**Stricter rules for Student visas introduced in 2011 (e.g. restrictions on work placements and post-study work)**

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57	
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
5 High negative impact	(5.0)	30	26	4	8	22	2	5	4	2	4	5	2	4
		6%	6%	7%	12%	5%	13%	9%	3%	9%	2%	13%	8%	10%
4	(4.0)	59	51	8	1	58	1	5	12	3	22	6	8	3
		11%	11%	14%	1%	13%	4%	7%	11%	10%	12%	14%	26%	8%
3	(3.0)	93	82	11	11	82	2	11	28	4	34	6	1	7
		18%	18%	19%	17%	18%	13%	17%	25%	14%	18%	14%	2%	18%
2	(2.0)	33	28	5	5	27	4	4	5	2	10	2	1	5
		6%	6%	10%	9%	6%	22%	6%	5%	7%	5%	5%	3%	12%
1 No Negative impact	(1.0)	119	107	13	27	93	7	22	21	5	42	11	2	9
		23%	23%	23%	42%	20%	35%	36%	19%	18%	23%	27%	8%	23%
Don't know		182	167	15	12	170	3	15	41	10	75	11	16	12
		35%	36%	27%	19%	38%	13%	24%	37%	41%	40%	27%	54%	29%
<b>Nets</b>														
High negative impact		89	77	12	9	80	3	10	16	5	27	11	10	7
		17%	17%	21%	13%	18%	16%	16%	14%	19%	14%	27%	34%	18%
Low negative impact		152	134	18	32	120	11	26	26	6	52	13	3	14
		29%	29%	32%	50%	27%	57%	42%	24%	25%	28%	32%	11%	35%
Mean Score		2.54	2.53	2.63	2.18	2.61	2.27	2.30	2.61	2.73	2.44	2.75	3.51	2.58



## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**Stricter rules for Student visas introduced in 2011 (e.g. restrictions on work placements and post-study work)**

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA	
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169	
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
5 High negative impact	(5.0)	30	12	17	6	24	*	11	19	13	17	6	23	1	29	7	12
		6%	5%	6%	6%	6%	*	9%	5%	8%	5%	5%	6%	4%	6%	6%	16%
4	(4.0)	59	29	30	14	43	2	12	47	14	46	11	44	4	55	21	5
		11%	12%	11%	16%	11%	7%	10%	12%	9%	13%	10%	12%	16%	11%	19%	6%
3	(3.0)	93	42	51	15	76	1	28	65	32	61	28	62	2	90	13	13
		18%	18%	19%	18%	19%	3%	23%	16%	21%	17%	25%	16%	11%	18%	12%	16%
2	(2.0)	33	20	13	3	29	1	11	22	13	20	8	25	1	33	9	5
		6%	8%	5%	4%	7%	3%	9%	6%	8%	6%	7%	6%	3%	7%	8%	6%
1 No Negative impact	(1.0)	119	64	55	16	86	17	27	92	30	90	31	85	2	117	24	17
		23%	27%	20%	19%	22%	49%	23%	23%	19%	25%	28%	22%	10%	23%	21%	21%
Don't know		182	71	106	33	136	13	31	151	52	130	28	142	12	181	38	27
		35%	30%	39%	38%	35%	37%	26%	38%	34%	36%	25%	37%	55%	36%	34%	34%
<b>Nets</b>																	
High negative impact		89	42	47	19	67	3	23	66	26	63	17	67	5	84	28	17
		17%	17%	17%	22%	17%	7%	19%	17%	17%	17%	15%	18%	21%	17%	25%	22%
Low negative impact		152	85	68	20	114	18	38	114	42	110	39	110	3	150	33	21
		29%	35%	25%	22%	29%	52%	32%	29%	28%	30%	35%	29%	14%	30%	30%	27%
Mean Score		2.54	2.44	2.65	2.80	2.58	1.50	2.65	2.51	2.67	2.49	2.44	2.56	3.03	2.52	2.70	2.83

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**Stricter eligibility requirements for Entrepreneur visas (e.g. requiring access to a high amount of investment funds)**

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57	
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
5 High negative impact	(5.0)	42	38	4	11	31	*	12	7	3	12	3	1	3
		8%	8%	7%	17%	7%	2%	20%	7%	11%	7%	8%	4%	7%
4	(4.0)	75	68	8	3	72	2	4	15	5	25	11	10	4
		15%	15%	14%	5%	16%	13%	6%	14%	19%	13%	27%	32%	9%
3	(3.0)	85	73	11	12	73	5	10	24	5	26	7	1	7
		16%	16%	20%	18%	16%	26%	16%	21%	21%	14%	16%	2%	18%
2	(2.0)	23	17	6	6	17	-	8	4	1	7	2	*	2
		4%	4%	10%	9%	4%	-	12%	3%	3%	4%	4%	1%	5%
1 No Negative impact	(1.0)	103	91	12	17	86	6	13	21	2	43	7	2	9
		20%	20%	21%	27%	19%	34%	21%	19%	7%	23%	17%	8%	22%
Don't know		188	172	16	15	173	5	15	40	10	74	12	16	16
		36%	37%	28%	23%	38%	26%	24%	36%	41%	39%	29%	54%	38%
<b>Nets</b>														
High negative impact		118	106	12	14	103	3	16	23	7	37	14	11	7
		23%	23%	21%	22%	23%	14%	26%	20%	29%	20%	35%	36%	16%
Low negative impact		126	108	18	23	103	6	21	25	2	50	8	3	11
		24%	24%	31%	36%	23%	34%	33%	22%	10%	27%	20%	9%	28%
Mean Score		2.79	2.81	2.66	2.70	2.81	2.30	2.90	2.79	3.40	2.62	3.08	3.50	2.56

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**Stricter eligibility requirements for Entrepreneur visas (e.g. requiring access to a high amount of investment funds)**

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA	
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169	
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
5 High negative impact	(5.0)	42	23	20	8	33	2	18	25	13	30	14	28	*	40	19	19
		8%	9%	7%	9%	8%	5%	15%	6%	8%	8%	13%	7%	1%	8%	17%	25%
4	(4.0)	75	32	43	15	58	2	11	64	18	57	13	58	4	71	22	9
		15%	13%	16%	18%	15%	5%	10%	16%	12%	16%	12%	15%	19%	14%	20%	12%
3	(3.0)	85	43	42	16	68	1	33	52	38	47	17	66	1	83	14	10
		16%	18%	15%	18%	17%	3%	28%	13%	25%	13%	15%	17%	7%	17%	13%	13%
2	(2.0)	23	14	9	7	15	1	10	13	15	7	13	9	1	23	3	2
		4%	6%	3%	8%	4%	3%	8%	3%	10%	2%	12%	2%	3%	5%	3%	3%
1 No Negative impact	(1.0)	103	55	48	12	74	17	22	81	22	81	26	75	2	101	20	15
		20%	23%	18%	14%	19%	49%	18%	20%	14%	22%	23%	20%	10%	20%	18%	20%
Don't know		188	73	109	29	146	12	26	161	47	140	29	146	13	186	34	23
		36%	30%	40%	33%	37%	35%	22%	41%	31%	39%	26%	38%	60%	37%	30%	29%
<b>Nets</b>																	
High negative impact		118	55	63	23	91	3	29	89	31	87	27	86	4	111	41	28
		23%	23%	23%	27%	23%	10%	24%	22%	20%	24%	24%	23%	20%	22%	37%	36%
Low negative impact		126	69	57	19	89	18	31	94	37	89	39	84	3	124	23	17
		24%	29%	21%	22%	23%	52%	26%	24%	24%	24%	35%	22%	13%	25%	20%	22%
Mean Score		2.79	2.72	2.86	3.01	2.84	1.67	2.93	2.73	2.86	2.76	2.72	2.81	2.94	2.77	3.24	3.27

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**The complexity and cost of the application process for General Visitor (tourist) visas**

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57	
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
5 High negative impact	(5.0)	44	38	5	11	33	5	7	4	2	17	5	2	1
		8%	8%	9%	17%	7%	24%	12%	4%	9%	9%	11%	7%	4%
4	(4.0)	63	57	6	4	59	*	6	16	3	15	8	11	4
		12%	12%	11%	7%	13%	*	10%	14%	13%	8%	19%	37%	10%
3	(3.0)	91	78	13	4	87	1	7	15	3	42	9	2	13
		18%	17%	23%	7%	19%	3%	11%	14%	13%	22%	22%	6%	32%
2	(2.0)	24	21	3	3	21	2	4	11	2	1	2	*	3
		5%	4%	6%	5%	5%	11%	6%	10%	7%	*	5%	*	8%
1 No Negative impact	(1.0)	108	96	12	20	88	5	18	24	4	43	6	2	7
		21%	21%	21%	31%	20%	24%	29%	22%	14%	23%	14%	8%	17%
Don't know		186	170	17	21	165	7	20	41	11	70	12	13	12
		36%	37%	30%	33%	37%	37%	33%	37%	44%	38%	29%	42%	29%
<b>Nets</b>														
High negative impact		107	95	11	15	91	5	14	20	6	32	12	13	6
		21%	21%	20%	24%	20%	25%	22%	18%	22%	17%	30%	44%	14%
Low negative impact		132	117	15	23	109	7	21	35	5	43	8	3	10
		26%	25%	27%	36%	24%	35%	34%	31%	21%	23%	19%	8%	25%
Mean Score		2.73	2.73	2.74	2.62	2.75	2.83	2.57	2.50	2.92	2.68	3.12	3.59	2.65

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**The complexity and cost of the application process for General Visitor (tourist) visas**

Base: All respondents

	Total	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA	
Unweighted Total	516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169	
Weighted Total	516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
5 High negative impact	(5.0)	44	13	31	5	35	4	14	30	15	29	13	31	-	43	11	16
		8%	5%	11%	6%	9%	12%	12%	8%	10%	8%	11%	8%	-	8%	10%	21%
4	(4.0)	63	38	25	19	41	2	19	44	17	46	16	43	4	59	29	14
		12%	16%	9%	22%	11%	7%	16%	11%	11%	13%	14%	11%	19%	12%	26%	18%
3	(3.0)	91	52	38	8	81	1	21	70	38	53	17	71	3	88	16	14
		18%	22%	14%	9%	21%	4%	17%	18%	25%	15%	15%	18%	15%	18%	15%	17%
2	(2.0)	24	8	16	5	19	*	8	16	5	19	11	13	*	24	10	2
		5%	3%	6%	6%	5%	1%	7%	4%	3%	5%	9%	3%	*	5%	9%	3%
1 No Negative impact	(1.0)	108	61	47	20	75	13	30	78	32	76	23	83	2	106	13	10
		21%	25%	17%	23%	19%	38%	25%	20%	21%	21%	20%	22%	10%	21%	12%	13%
Don't know		186	67	114	30	143	13	28	159	46	140	34	140	12	184	32	22
		36%	28%	42%	34%	36%	38%	23%	40%	30%	39%	30%	37%	56%	37%	29%	28%
<b>Nets</b>																	
High negative impact		107	52	55	24	76	7	33	74	32	75	28	74	4	102	40	30
		21%	22%	20%	28%	19%	19%	28%	19%	21%	21%	25%	19%	19%	20%	36%	38%
Low negative impact		132	69	63	25	93	14	38	94	38	94	33	96	2	130	23	13
		26%	29%	23%	29%	24%	40%	32%	24%	25%	26%	30%	25%	11%	26%	21%	16%
Mean Score		2.73	2.62	2.84	2.72	2.77	2.25	2.77	2.71	2.78	2.70	2.81	2.69	2.96	2.71	3.19	3.41

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**The complexity and cost of the application process for Business Visitor visas**

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Manufacturing	Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	
Unweighted Total	516	277	239	46	470	20	57	91	64	86	110	31	57	
Weighted Total	516	460	56	64	452	19	61	112	25	187	40	30	41	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
5 High negative impact	(5.0)	57	52	5	11	46	5	8	7	3	21	5	5	3
		11%	11%	10%	17%	10%	24%	13%	6%	11%	11%	13%	15%	8%
4	(4.0)	54	49	5	1	53	-	4	16	3	9	11	8	3
		10%	11%	10%	2%	12%	-	6%	14%	12%	5%	27%	27%	8%
3	(3.0)	98	85	14	16	83	5	14	21	5	36	7	2	9
		19%	18%	24%	25%	18%	28%	23%	19%	19%	19%	17%	7%	22%
2	(2.0)	22	18	4	6	16	*	8	2	1	9	*	*	1
		4%	4%	7%	10%	4%	1%	13%	2%	3%	5%	*	*	3%
1 No Negative impact	(1.0)	84	72	12	11	74	4	8	24	2	31	5	1	8
		16%	16%	22%	17%	16%	23%	14%	22%	9%	16%	13%	4%	20%
Don't know		200	184	16	19	181	5	19	41	12	81	12	14	16
		39%	40%	28%	30%	40%	25%	32%	37%	46%	43%	30%	45%	39%
<b>Nets</b>														
High negative impact		111	100	11	12	99	5	12	23	6	30	16	13	7
		22%	22%	19%	19%	22%	24%	19%	20%	23%	16%	40%	43%	16%
Low negative impact		107	91	16	17	90	4	16	26	3	40	5	1	9
		21%	20%	28%	26%	20%	23%	27%	24%	12%	21%	13%	5%	23%
Mean Score		2.93	2.96	2.70	2.90	2.93	3.02	2.88	2.71	3.24	2.82	3.38	3.90	2.70

## QES Q3 2014

10. To what extent, if at all, do you believe that each of the following issues with visa categories has had a negative impact on the London economy as a whole? Please rate on a scale from 5 to 1, where 5 = a high negative impact and 1 = no negative impact.

**The complexity and cost of the application process for Business Visitor visas**

Base: All respondents

		Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment			
		Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU/EEA citizens	UK/EU/EAA
Unweighted Total		516	290	224	135	343	38	198	318	213	303	133	357	26	506	212	169
Weighted Total		516	239	271	87	394	35	120	396	153	363	113	381	22	505	112	78
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
5 High negative impact	(5.0)	57	30	27	9	44	4	23	34	21	36	14	42	1	56	23	23
		11%	12%	10%	10%	11%	13%	19%	9%	14%	10%	12%	11%	4%	11%	21%	29%
4	(4.0)	54	26	28	14	38	2	10	44	11	43	15	38	1	49	17	6
		10%	11%	10%	16%	10%	5%	8%	11%	7%	12%	14%	10%	5%	10%	15%	8%
3	(3.0)	98	50	48	15	82	1	35	63	42	56	23	74	1	97	24	14
		19%	21%	18%	18%	21%	3%	29%	16%	28%	15%	21%	19%	4%	19%	22%	18%
2	(2.0)	22	13	10	7	10	5	8	14	12	10	14	7	1	22	7	6
		4%	5%	4%	8%	3%	14%	7%	4%	8%	3%	13%	2%	3%	4%	6%	7%
1 No Negative impact	(1.0)	84	48	37	11	65	9	15	69	20	64	10	69	5	82	10	6
		16%	20%	13%	13%	16%	25%	13%	17%	13%	18%	9%	18%	24%	16%	9%	7%
Don't know		200	73	121	31	155	14	28	172	46	154	35	151	13	197	30	24
		39%	31%	45%	35%	39%	40%	24%	43%	30%	42%	31%	40%	60%	39%	27%	31%
<b>Nets</b>																	
High negative impact		111	55	56	23	82	6	33	78	32	79	29	80	2	105	40	29
		22%	23%	21%	26%	21%	18%	27%	20%	21%	22%	26%	21%	9%	21%	36%	37%
Low negative impact		107	60	46	18	75	14	24	83	32	74	25	76	6	105	17	11
		21%	25%	17%	21%	19%	39%	20%	21%	21%	20%	22%	20%	27%	21%	15%	15%
Mean Score		2.93	2.86	3.00	3.04	2.94	2.45	3.18	2.83	3.01	2.89	3.11	2.90	2.07	2.92	3.45	3.63