



## LCCI – QES Q2 2019

Methodology: ComRes interviewed 503 London business decision makers online between the 10<sup>th</sup> May and 11<sup>th</sup> June 2019. 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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## LCCI - Topical Q2 2019

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Base: All respondents excl. not applicable	

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### Q1a. What, if any, are the greatest barriers to improving your business's internet presence?

Base: All respondents

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cost of setting it up	110	94	17	4	25	23	15	11	19	3	11	17	94
	22%	21%	32%	25%	35%	22%	22%	19%	16%	10%	30%	34%	21%
			a		ghi						hi	l	
Lack of staff with the right skills	103	88	15	8	22	28	10	11	13	7	5	24	79
	20%	19%	29%	42%	31%	27%	15%	19%	11%	22%	12%	48%	17%
			a		fhj	hj						l	
A lack of awareness or understanding of how to improve my business's internet presence	95	83	12	7	8	21	11	13	25	5	5	11	84
	19%	18%	23%	36%	12%	20%	17%	22%	21%	18%	14%	22%	19%
The fast-changing pace of technology	90	78	12	*	13	20	20	11	15	4	6	7	83
	18%	17%	23%	2%	19%	19%	30%	20%	12%	14%	15%	13%	18%
							hj						
Concern over online crime	59	46	13	1	8	8	12	8	17	4	1	6	53
	12%	10%	25%	3%	12%	8%	17%	14%	14%	13%	4%	12%	12%
			a				j	j	j				
Poor broadband speed or connectivity	50	42	8	2	3	16	9	4	9	2	5	3	47
	10%	9%	15%	10%	4%	16%	13%	7%	8%	6%	14%	5%	10%
			a			d							
A lack of adequate business space with high-speed internet capabilities	30	26	4	-	5	12	4	2	6	*	1	3	27
	6%	6%	7%	-	7%	12%	5%	4%	5%	1%	2%	6%	6%
						ij							
Other	17	17	*	-	-	2	9	1	2	-	2	-	17
	3%	4%	*	-	-	2%	14%	3%	2%	-	6%	-	4%
		b					deghi						

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

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### Q1a. What, if any, are the greatest barriers to improving your business's internet presence?

Base: All respondents

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not applicable, my company does not have an online presence because it is not relevant to my business	102	99	3	4	25	13	9	10	32	6	3	6	96
	20%	22%	6%	22%	36%	13%	14%	18%	27%	19%	8%	12%	21%
		b			efgj				ej				
Not applicable, my business's current online presence is satisfactory	122	110	12	*	8	23	17	21	32	10	12	7	115
	24%	24%	23%	1%	12%	22%	26%	36%	26%	34%	30%	15%	25%
							de	d	d	d			

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

## LCCI - Topical Q2 2019

### Q1a. What, if any, are the greatest barriers to improving your business's internet presence?

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cost of setting it up	110	52	59	19	76	15	28	82	44	66	44	60	7
	22%	20%	23%	30%	19%	46%	31%	20%	22%	22%	30%	18%	28%
			d	d	d	g				k			
Lack of staff with the right skills	103	41	62	22	68	13	37	66	37	65	44	52	7
	20%	16%	25%	35%	17%	38%	41%	16%	19%	21%	30%	16%	30%
		a	d	d	d	g				k			
A lack of awareness or understanding of how to improve my business's internet presence	95	50	46	15	75	5	18	77	38	57	32	54	9
	19%	20%	18%	23%	18%	17%	20%	19%	19%	19%	22%	16%	36%
The fast-changing pace of technology	90	55	35	14	63	13	27	63	40	50	32	48	10
	18%	22%	14%	22%	15%	39%	30%	15%	20%	16%	22%	14%	39%
		b			cd	g				k			
Concern over online crime	59	33	26	10	41	8	15	44	25	34	26	27	6
	12%	13%	10%	16%	10%	24%	17%	11%	13%	11%	18%	8%	23%
				d	d	d				k			
Poor broadband speed or connectivity	50	19	31	10	33	7	17	33	19	31	17	26	7
	10%	8%	12%	16%	8%	21%	19%	8%	10%	10%	12%	8%	28%
			d	d	d	g							
A lack of adequate business space with high-speed internet capabilities	30	12	18	9	14	7	13	17	16	15	15	12	3
	6%	5%	7%	14%	3%	21%	14%	4%	8%	5%	10%	4%	13%
			d	d	d	g					k		
Other	17	6	10	-	15	2	2	15	8	9	1	14	2
	3%	2%	4%	-	4%	6%	2%	4%	4%	3%	*	4%	10%
				c							j		

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



## LCCI - Topical Q2 2019

### Q1a. What, if any, are the greatest barriers to improving your business's internet presence?

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503 100%	253 100%	250 100%	63 100%	407 100%	33 100%	89 100%	414 100%	198 100%	305 100%	146 100%	332 100%	25 100%
Not applicable, my company does not have an online presence because it is not relevant to my business	102 20%	48 19%	54 22%	1 2%	93 23%	8 23%	3 4%	99 24%	32 16%	70 23%	19 13%	77 23%	6 24%
Not applicable, my business's current online presence is satisfactory	122 24%	62 25%	59 24%	12 19%	106 26%	4 11%	13 15%	108 26%	44 22%	77 25%	28 19%	93 28%	1 5%

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

## LCCI - Topical Q2 2019

### Q1b. What, if any, are the greatest barriers to improving your business's internet presence?

Base: All respondents excl. not applicable

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	309	171	138	13	36	74	37	40	39	25	45	37	272
Weighted Total	279	242	37	14	37	68	41	27	56	14	23	36	243
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cost of setting it up	110	94	17	4	25	23	15	11	19	3	11	17	94
	40%	39%	45%	32%	67%	34%	36%	41%	33%	21%	48%	46%	39%
					efgh								
Lack of staff with the right skills	103	88	15	8	22	28	10	11	13	7	5	24	79
	37%	36%	41%	54%	59%	41%	24%	42%	24%	46%	20%	66%	33%
					fhj	j		j				l	
A lack of awareness or understanding of how to improve my business's internet presence	95	83	12	7	8	21	11	13	25	5	5	11	84
	34%	34%	33%	47%	23%	31%	27%	48%	45%	37%	23%	30%	35%
								dj	j				
The fast-changing pace of technology	90	78	12	*	13	20	20	11	15	4	6	7	83
	32%	32%	33%	3%	36%	30%	50%	43%	26%	30%	25%	18%	34%
							ehj					k	
Concern over online crime	59	46	13	1	8	8	12	8	17	4	1	6	53
	21%	19%	36%	4%	23%	12%	28%	30%	31%	26%	6%	16%	22%
			a		j		ej	ej	ej				
Poor broadband speed or connectivity	50	42	8	2	3	16	9	4	9	2	5	3	47
	18%	17%	22%	13%	7%	24%	21%	16%	17%	12%	23%	7%	19%
					d								
A lack of adequate business space with high-speed internet capabilities	30	26	4	-	5	12	4	2	6	*	1	3	27
	11%	11%	11%	-	13%	18%	9%	8%	11%	2%	3%	8%	11%
						j							

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

## LCCI - Topical Q2 2019

### Q1b. What, if any, are the greatest barriers to improving your business's internet presence?

Base: All respondents excl. not applicable

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	*i	j	k	l	
Significance Level: 95%													
Unweighted Total	309	171	138	13	36	74	37	40	39	25	45	37	272
Weighted Total	279	242	37	14	37	68	41	27	56	14	23	36	243
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Other	17	17	*	-	-	2	9	1	2	-	2	-	17
	6%	7%	*	-	-	2%	22%	5%	4%	-	10%	-	7%
		b					degh						

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

## LCCI - Topical Q2 2019

### Q1b. What, if any, are the greatest barriers to improving your business's internet presence?

Base: All respondents excl. not applicable

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	*e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	309	178	131	80	202	27	126	183	162	147	117	178	14
Weighted Total	279	143	136	51	207	22	73	206	122	157	100	162	18
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cost of setting it up	110	52	59	19	76	15	28	82	44	66	44	60	7
	40%	36%	43%	37%	37%	71%	39%	40%	36%	42%	44%	37%	39%
Lack of staff with the right skills	103	41	62	22	68	13	37	66	37	65	44	52	7
	37%	28%	46%	43%	33%	58%	51%	32%	31%	41%	44%	32%	42%
			a				g			h	k		
A lack of awareness or understanding of how to improve my business's internet presence	95	50	46	15	75	5	18	77	38	57	32	54	9
	34%	35%	34%	29%	36%	25%	25%	37%	31%	36%	32%	34%	51%
							f						
The fast-changing pace of technology	90	55	35	14	63	13	27	63	40	50	32	48	10
	32%	39%	26%	28%	30%	60%	37%	30%	33%	32%	32%	30%	55%
		b											
Concern over online crime	59	33	26	10	41	8	15	44	25	34	26	27	6
	21%	23%	19%	21%	20%	36%	21%	21%	21%	21%	26%	17%	33%
Poor broadband speed or connectivity	50	19	31	10	33	7	17	33	19	31	17	26	7
	18%	14%	23%	20%	16%	32%	23%	16%	16%	20%	17%	16%	39%
			a										
A lack of adequate business space with high-speed internet capabilities	30	12	18	9	14	7	13	17	16	15	15	12	3
	11%	8%	13%	18%	7%	32%	17%	8%	13%	9%	15%	7%	19%
			d				g				k		
Other	17	6	10	-	15	2	2	15	8	9	1	14	2
	6%	4%	8%	-	7%	9%	3%	7%	6%	6%	1%	8%	14%
					c						j		

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

## LCCI - Topical Q2 2019

**Q2a. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	33	30	4	4	1	13	2	5	5	3	1	4	29
	7%	7%	7%	20%	1%	13%	3%	8%	4%	11%	3%	9%	6%
						dhj				d			
Less than once a day but at least once a week	48	40	8	2	5	6	9	7	9	6	4	3	45
	10%	9%	15%	12%	8%	6%	13%	12%	8%	20%	9%	7%	10%
			a						e				
Less than once a week but at least once a month	76	65	11	4	17	11	8	9	17	4	7	13	63
	15%	14%	21%	23%	24%	10%	13%	15%	14%	14%	18%	26%	14%
				e								l	
Less than once a month but at least once every six months	102	93	9	4	21	26	14	6	23	3	6	14	88
	20%	21%	16%	24%	30%	25%	21%	11%	19%	9%	15%	29%	19%
					gij	gi							
Less than once every six months, but in the last 12 months	108	97	11	4	12	21	17	17	24	4	9	8	101
	21%	21%	22%	21%	17%	20%	25%	31%	20%	14%	23%	15%	22%
								i					
Never in the last twelve months	119	113	6	-	13	23	15	11	39	8	11	7	112
	24%	25%	11%	-	18%	22%	22%	19%	33%	26%	30%	14%	25%
		b											
Don't know	16	12	4	*	1	5	2	2	3	2	1	*	16
	3%	3%	8%	1%	2%	5%	3%	4%	3%	8%	2%	*	4%
			a										

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

## LCCI - Topical Q2 2019

**Q2a. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: At least once every six months	260 52%	229 51%	31 59%	14 79%	44 63% hj	56 53%	33 49%	27 46%	53 45%	16 53%	17 45%	35 71% l	225 50%
Net: At least once a month	158 31%	135 30%	22 43% a	10 54%	23 33%	30 29%	19 29%	21 36%	31 26%	13 45% h	11 30%	21 42%	137 30%
Net: At least once a week	82 16%	70 16%	11 22%	6 32%	6 9%	19 19%	11 16%	12 21%	14 12%	9 31% dhj	5 12%	8 16%	74 16%

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

## LCCI - Topical Q2 2019

**Q2a. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	33 7%	14 6%	19 8%	15 23% de	19 5%	* *	16 18% g	17 4%	15 8%	18 6%	18 12% k	14 4%	2 6%
Less than once a day but at least once a week	48 10%	27 10%	22 9%	10 17% d	30 7%	7 22% d	15 17% g	33 8%	17 8%	31 10%	11 7%	33 10%	4 17%
Less than once a week but at least once a month	76 15%	34 14%	42 17%	9 15%	63 16%	3 10%	15 17%	61 15%	31 16%	45 15%	27 18%	47 14%	2 9%
Less than once a month but at least once every six months	102 20%	53 21%	49 20%	7 12%	90 22% c	5 15%	17 19%	85 21%	38 19%	64 21%	35 24%	63 19%	4 17%
Less than once every six months, but in the last 12 months	108 21%	70 27% b	39 15%	11 18%	89 22%	8 23%	16 18%	92 22%	42 21%	66 22%	29 20%	76 23%	3 13%
Never in the last twelve months	119 24%	44 18%	74 30% a	9 15%	103 25% c	7 21%	7 8%	112 27% f	48 24%	71 23%	25 17%	86 26% j	8 30%
Don't know	16 3%	12 5%	5 2%	1 1%	13 3%	3 8% c	3 4%	13 3%	8 4%	9 3%	1 1%	13 4%	2 8%
<b>NETS</b>													
Net: At least once every six months	260 52%	127 50%	132 53%	42 66% de	202 50%	16 47%	63 70% g	197 48%	101 51%	159 52%	90 62% k	157 47%	12 49%
Net: At least once a month	158 31%	75 30%	83 33%	35 55% de	112 28%	11 32%	46 52% g	112 27%	63 32%	95 31%	55 38% k	94 28%	8 33%

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

## LCCI - Topical Q2 2019

**Q2a. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents

Significance Level: 95%

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	*l	
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a week	82	40	41	25	49	7	31	50	32	49	29	47	6
	16%	16%	16%	40%	12%	23%	35%	12%	16%	16%	20%	14%	23%
				d			g						

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



## LCCI - Topical Q2 2019

### Q2b. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	481	304	177	17	57	105	52	65	72	43	70	48	433
Weighted Total	487	438	48	18	69	99	65	55	116	27	37	49	438
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	33	30	4	4	1	13	2	5	5	3	1	4	29
	7%	7%	7%	20%	1%	13%	3%	9%	4%	12%	3%	9%	7%
						dhj				d			
Less than once a day but at least once a week	48	40	8	2	5	6	9	7	9	6	4	3	45
	10%	9%	16%	12%	8%	6%	13%	13%	8%	21%	9%	7%	10%
			a							eh			
Less than once a week but at least once a month	76	65	11	4	17	11	8	9	17	4	7	13	63
	16%	15%	23%	23%	24%	11%	13%	16%	14%	15%	18%	26%	14%
			a		e							l	
Less than once a month but at least once every six months	102	93	9	4	21	26	14	6	23	3	6	14	88
	21%	21%	18%	25%	31%	26%	21%	11%	19%	9%	15%	29%	20%
					gij	gi							
Less than once every six months, but in the last 12 months	108	97	11	4	12	21	17	17	24	4	9	8	101
	22%	22%	24%	21%	18%	21%	26%	32%	21%	15%	24%	15%	23%
								i					
Never in the last twelve months	119	113	6	-	13	23	15	11	39	8	11	7	112
	24%	26%	12%	-	18%	23%	23%	20%	33%	28%	30%	14%	26%
		b											
<b>NETS</b>													
Net: At least once every six months	260	229	31	14	44	56	33	27	53	16	17	35	225
	53%	52%	64%	79%	64%	56%	51%	48%	46%	58%	46%	71%	51%
			a		hj							l	

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

## LCCI - Topical Q2 2019

**Q2b. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents excl. don't know

	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
Total	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	481	304	177	17	57	105	52	65	72	43	70	48	433
Weighted Total	487	438	48	18	69	99	65	55	116	27	37	49	438
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	158	135	22	10	23	30	19	21	31	13	11	21	137
	32%	31%	46%	55%	33%	30%	30%	37%	26%	48%	31%	42%	31%
			a							eh			
Net: At least once a week	82	70	11	6	6	19	11	12	14	9	5	8	74
	17%	16%	24%	32%	9%	19%	17%	22%	12%	33%	13%	16%	17%
			a							dhj			

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

## LCCI - Topical Q2 2019

### Q2b. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	*l	
Significance Level: 95%													
Unweighted Total	481	266	215	98	346	37	150	331	225	256	157	304	20
Weighted Total	487	241	245	62	394	30	86	400	190	296	145	319	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	33 7%	14 6%	19 8%	15 24% de	19 5%	* *	16 19% g	17 4%	15 8%	18 6%	18 13% k	14 4%	2 7%
Less than once a day but at least once a week	48 10%	27 11%	22 9%	10 17% d	30 8%	7 24% d	15 17% g	33 8%	17 9%	31 11%	11 7%	33 10%	4 19%
Less than once a week but at least once a month	76 16%	34 14%	42 17%	9 15%	63 16%	3 11%	15 17%	61 15%	31 16%	45 15%	27 19%	47 15%	2 10%
Less than once a month but at least once every six months	102 21%	53 22%	49 20%	7 12%	90 23% c	5 16%	17 20%	85 21% f	38 20%	64 22%	35 24%	63 20%	4 18%
Less than once every six months, but in the last 12 months	108 22%	70 29% b	39 16%	11 18%	89 23% c	8 25%	16 18%	92 23% f	42 22%	66 22%	29 20%	76 24%	3 14%
Never in the last twelve months	119 24%	44 18%	74 30% a	9 15%	103 26% c	7 23%	7 8%	112 28% f	48 25%	71 24%	25 18%	86 27% j	8 33%
<b>NETS</b>													
Net: At least once every six months	260 53%	127 53%	132 54%	42 67% d	202 51%	16 52%	63 73% g	197 49%	101 53%	159 54%	90 63% k	157 49%	12 54%
Net: At least once a month	158 32%	75 31%	83 34%	35 56% de	112 29%	11 35%	46 54% g	112 28%	63 33%	95 32%	55 38%	94 29%	8 36%

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

## LCCI - Topical Q2 2019

**Q2b. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents excl. don't know

Significance Level: 95%

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	*l	
Unweighted Total	481	266	215	98	346	37	150	331	225	256	157	304	20
Weighted Total	487	241	245	62	394	30	86	400	190	296	145	319	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a week	82	40	41	25	49	7	31	50	32	49	29	47	6
	17%	17%	17%	41%	12%	25%	36%	13%	17%	17%	20%	15%	25%
				d	d		g						

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

## LCCI - Topical Q2 2019

### Q2c. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?

Base: All respondents excl. don't know and never

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	381	224	157	17	47	86	43	54	51	33	50	42	339
Weighted Total	368	325	42	18	56	76	50	44	77	20	26	42	326
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	33	30	4	4	1	13	2	5	5	3	1	4	29
	9%	9%	8%	20%	1%	17%	4%	11%	6%	16%	5%	10%	9%
						dfj				d			
Less than once a day but at least once a week	48	40	8	2	5	6	9	7	9	6	4	3	45
	13%	12%	19%	12%	10%	8%	17%	16%	12%	29%	14%	8%	14%
										de			
Less than once a week but at least once a month	76	65	11	4	17	11	8	9	17	4	7	13	63
	21%	20%	26%	23%	30%	14%	17%	19%	22%	21%	26%	31%	19%
					e								
Less than once a month but at least once every six months	102	93	9	4	21	26	14	6	23	3	6	14	88
	28%	29%	20%	25%	38%	34%	27%	14%	29%	13%	22%	33%	27%
					gi	gi							
Less than once every six months, but in the last 12 months	108	97	11	4	12	21	17	17	24	4	9	8	101
	29%	30%	27%	21%	22%	27%	34%	40%	31%	20%	34%	18%	31%
<b>NETS</b>													
Net: At least once every six months	260	229	31	14	44	56	33	27	53	16	17	35	225
	71%	70%	73%	79%	78%	73%	66%	60%	69%	80%	66%	82%	69%
Net: At least once a month	158	135	22	10	23	30	19	21	31	13	11	21	137
	43%	42%	53%	55%	41%	39%	39%	47%	40%	67%	44%	49%	42%
			a							defhj			

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

## LCCI - Topical Q2 2019

**Q2c. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents excl. don't know and never

Significance Level: 95%

	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
Total	a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total	381	224	157	17	47	86	43	54	51	33	50	42	339
Weighted Total	368	325	42	18	56	76	50	44	77	20	26	42	326
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a week	82	70	11	6	6	19	11	12	14	9	5	8	74
	22%	22%	27%	32%	11%	25%	22%	27%	18%	46%	18%	18%	23%
								d		defhj			

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

## LCCI - Topical Q2 2019

**Q2c. Thinking about the last year, how often, if at all, would you say that your business experienced digital connectivity issues, such as problems connecting to the internet or a router?**

Base: All respondents excl. don't know and never

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	381	223	158	86	263	32	138	243	181	200	133	234	14
Weighted Total	368	197	171	53	291	23	79	289	142	225	119	233	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	33 9%	14 7%	19 11%	15 28% de	19 6%	* *	16 21%	17 6%	15 11%	18 8%	18 15% k	14 6%	2 10%
Less than once a day but at least once a week	48 13%	27 13%	22 13%	10 20% d	30 10%	7 32% d	15 19% g	33 12%	17 12%	31 14%	11 9%	33 14%	4 28%
Less than once a week but at least once a month	76 21%	34 17%	42 24%	9 18%	63 22%	3 14%	15 19%	61 21%	31 22%	45 20%	27 22%	47 20%	2 15%
Less than once a month but at least once every six months	102 28%	53 27%	49 29%	7 14%	90 31% c	5 21%	17 21%	85 29%	38 26%	64 29%	35 29%	63 27%	4 27%
Less than once every six months, but in the last 12 months	108 29%	70 35% b	39 23%	11 21%	89 31%	8 33%	16 20%	92 32% f	42 29%	66 29%	29 24%	76 33%	3 21%
<b>NETS</b>													
Net: At least once every six months	260 71%	127 65%	132 77% a	42 79%	202 69%	16 67%	63 80% g	197 68%	101 71%	159 71%	90 76%	157 67%	12 79%
Net: At least once a month	158 43%	75 38%	83 49% a	35 65% d	112 39%	11 46%	46 58% g	112 39%	63 44%	95 42%	55 47%	94 40%	8 53%
Net: At least once a week	82 22%	40 21%	41 24%	25 48% d	49 17%	7 32% d	31 40% g	50 17%	32 23%	49 22%	29 24%	47 20%	6 37%

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

## LCCI - Topical Q2 2019

**Q3a\_SUM. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### SUMMARY TABLE

Base: All respondents

	Total	Very important	Fairly important	Not very important	Not important at all	Don't know	NETS		Mean
							Important	Not important	
Minimising customs procedures on trade with the EU (e.g. proof of origin of goods)	503 100%	232 46%	137 27%	50 10%	31 6%	53 11%	369 73%	81 16%	3.3
Minimising import/export licensing requirements on trade with the EU (i.e. procedures other than those required for customs)	503 100%	214 43%	125 25%	53 11%	34 7%	76 15%	340 68%	87 17%	3.2
Minimising restrictions to the free movement of workers between the UK and the EU	503 100%	198 39%	130 26%	65 13%	57 11%	53 11%	328 65%	122 24%	3.0
UK control over the extent to which UK businesses will have to comply with EU product standards (e.g. labelling or certification)	503 100%	170 34%	158 31%	66 13%	51 10%	58 12%	328 65%	117 23%	3.0
Minimising restrictions on the quantity of goods/services that can be traded with the EU	503 100%	195 39%	130 26%	69 14%	52 10%	58 11%	325 65%	120 24%	3.1
UK control over the extent to which UK businesses will have to comply with EU employment law (e.g. the working time directive)	503 100%	135 27%	151 30%	89 18%	60 12%	67 13%	286 57%	150 30%	2.8
Allowing the UK government to set restrictions on trade with the EU to protect UK business	503 100%	113 22%	134 27%	95 19%	77 15%	85 17%	247 49%	172 34%	2.7



## LCCI - Topical Q2 2019

**Q3a\_SUM. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### SUMMARY TABLE

Base: All respondents

	Total	Very important	Fairly important	Not very important	Not important at all	Don't know	NETS		Mean
							Important	Not important	
Limiting the free movement of capital between the UK and the EU	503 100%	123 24%	103 21%	90 18%	106 21%	81 16%	226 45%	196 39%	2.6
Restricting UK public procurement to UK business, even if this means UK business cannot bid for EU public procurement	503 100%	69 14%	145 29%	97 19%	91 18%	101 20%	214 43%	188 37%	2.5

## LCCI - Topical Q2 2019

Q3a\_1. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?

### Minimising customs procedures on trade with the EU (e.g. proof of origin of goods)

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 232	213	19	9	26	49	29	23	64	12	20	18	214
	46%	47%	36%	50%	37%	47%	43%	40%	54%	41%	54%	36%	47%
Fairly important	(3) 137	118	19	5	24	31	21	14	31	6	4	19	118
	27%	26%	36%	28%	35%	30%	32%	25%	26%	19%	10%	38%	26%
Not very important	(2) 50	42	8	2	7	8	2	13	8	5	4	8	42
	10%	9%	16%	10%	11%	8%	4%	22%	7%	18%	12%	17%	9%
Not important at all	(1) 31	28	3	-	8	5	4	2	9	2	1	2	29
	6%	6%	6%	-	11%	5%	5%	3%	8%	6%	3%	4%	6%
Don't know	53	50	3	2	4	11	11	5	7	5	8	2	51
	11%	11%	7%	12%	6%	11%	16%	9%	6%	17%	21%	5%	11%
<b>NETS</b>													
Net: Important	369	332	37	14	50	80	50	38	96	18	24	37	333
	73%	74%	72%	78%	72%	77%	74%	65%	80%	60%	64%	75%	73%
Net: Not important	81	69	11	2	15	13	6	15	17	7	6	10	70
	16%	15%	22%	10%	22%	13%	9%	26%	14%	24%	15%	21%	15%
Mean score	3.3	3.3	3.1	3.5	3.0	3.3	3.3	3.1	3.3	3.1	3.5	3.1	3.3
Standard deviation	.91	.91	.90	.71	1.00	.86	.85	.91	.92	1.00	.90	.85	.92
Standard error	.04	.06	.07	.18	.13	.09	.12	.12	.11	.16	.12	.12	.05

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

## LCCI - Topical Q2 2019

Q3a\_1. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?

### Minimising customs procedures on trade with the EU (e.g. proof of origin of goods)

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 232 46%	118 47%	114 46%	25 39%	190 47%	17 53%	37 41%	196 47%	75 38%	157 52% h	64 44%	156 47%	12 47%
Fairly important	(3) 137 27%	72 28%	65 26%	21 34%	106 26%	10 30%	37 41% g	101 24%	53 27%	84 28%	49 34% k	79 24%	9 35%
Not very important	(2) 50 10%	27 10%	23 9%	10 16% d	34 8%	5 16%	12 13%	38 9%	28 14% i	22 7%	18 12%	27 8%	5 18%
Not important at all	(1) 31 6%	13 5%	18 7%	4 7%	26 6%	- -	2 2%	29 7% f	16 8%	14 5%	4 3%	27 8% j	- -
Don't know	53 11%	24 9%	29 12%	3 4%	50 12% ce	* 1%	3 3%	51 12% f	27 13%	27 9%	10 7%	43 13% j	- -
<b>NETS</b>													
Net: Important	369 73%	190 75%	179 72%	46 73%	296 73%	27 83%	73 82% g	296 72%	128 64%	242 79% h	114 78%	235 71%	21 82%
Net: Not important	81 16%	39 15%	41 17%	15 23% d	61 15%	5 16%	14 15%	67 16%	44 22% i	37 12%	22 15%	54 16%	5 18%
Mean score	3.3	3.3	3.2	3.1	3.3	3.4	3.2	3.3	3.1	3.4 h	3.3	3.3	3.3
Standard deviation	.91	.88	.94	.93	.92	.76	.77	.94	.99	.84	.81	.97	.77
Standard error	.04	.06	.07	.09	.05	.12	.06	.05	.07	.05	.07	.06	.16

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

## LCCI - Topical Q2 2019

**Q3a\_2. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising import/export licensing requirements on trade with the EU (i.e. procedures other than those required for customs)

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important (4)	214	198	17	8	24	42	33	21	54	11	20	14	200
	43%	44%	32%	42%	35%	41%	50%	37%	45%	38%	54%	29%	44%
		b								d		k	
Fairly important (3)	125	106	19	4	26	32	13	13	30	5	3	19	107
	25%	24%	37%	21%	37%	31%	19%	23%	25%	16%	7%	38%	24%
		a			fij	j		j	j			l	
Not very important (2)	53	45	9	3	6	5	4	13	12	5	5	8	45
	11%	10%	16%	15%	9%	4%	6%	22%	10%	18%	13%	17%	10%
		a						def		e	e		
Not important at all (1)	34	32	3	2	6	5	6	3	9	3	1	4	31
	7%	7%	5%	10%	8%	5%	9%	5%	8%	10%	3%	7%	7%
Don't know	76	71	5	2	8	20	11	7	14	5	8	4	72
	15%	16%	9%	12%	11%	19%	16%	12%	12%	18%	22%	8%	16%
		b											
<b>NETS</b>													
Net: Important	340	304	36	11	50	74	46	34	84	16	23	33	307
	68%	67%	69%	63%	72%	72%	68%	60%	71%	54%	61%	67%	68%
						i							
Net: Not important	87	76	11	5	12	9	10	16	21	8	6	12	75
	17%	17%	21%	25%	17%	9%	15%	28%	18%	28%	16%	24%	17%
								e		e			
Mean score	3.2	3.2	3.1	3.1	3.1	3.3	3.3	3.0	3.2	3.0	3.4	3.0	3.2
											gi		
Standard deviation	.95	.96	.88	1.08	.92	.83	1.01	.97	.96	1.10	.93	.92	.95
Standard error	.05	.06	.07	.27	.12	.08	.15	.13	.12	.18	.12	.14	.05

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

## LCCI - Topical Q2 2019

**Q3a\_2. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising import/export licensing requirements on trade with the EU (i.e. procedures other than those required for customs)

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 214 43%	120 47%	94 38%	25 39%	175 43%	15 45%	37 42%	177 43%	70 35%	145 48%	67 46%	138 41%	10 40%
		b								h			
Fairly important	(3) 125 25%	64 25%	61 24%	21 34%	91 22%	13 41%	29 33%	96 23%	49 25%	77 25%	41 28%	74 22%	10 40%
				d		d	g						
Not very important	(2) 53 11%	19 8%	34 13%	10 15%	39 10%	4 13%	11 12%	42 10%	20 10%	33 11%	15 11%	35 11%	3 11%
			a										
Not important at all	(1) 34 7%	19 7%	16 6%	4 6%	31 8%	- -	5 5%	30 7%	20 10%	15 5%	7 5%	27 8%	- -
									i				
Don't know	76 15%	30 12%	45 18%	4 6%	72 18%	* 1%	8 9%	68 16%	40 20%	36 12%	15 10%	58 18%	2 8%
				ce			f		i			j	
<b>NETS</b>													
Net: Important	340 68%	185 73%	155 62%	46 73%	265 65%	28 86%	67 74%	273 66%	118 60%	222 73%	108 74%	212 64%	20 80%
		b				d				h	k		
Net: Not important	87 17%	38 15%	49 20%	14 21%	70 17%	4 13%	15 17%	72 17%	40 20%	47 16%	23 15%	62 19%	3 11%
Mean score	3.2	3.3	3.1	3.1	3.2	3.3	3.2	3.2	3.1	3.3	3.3	3.2	3.3
Standard deviation	.95	.94	.96	.91	.98	.71	.88	.97	1.03	.89	.88	1.00	.70
Standard error	.05	.06	.07	.09	.06	.11	.07	.06	.07	.06	.07	.06	.15

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

## LCCI - Topical Q2 2019

**Q3a\_3. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising restrictions on the quantity of goods/services that can be traded with the EU

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
		a	b	*c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4)	195	180	15	9	18	41	29	23	50	9	17	180
		39%	40%	29%	49%	26%	39%	43%	40%	42%	30%	44%	40%
			b								d		
Fairly important	(3)	130	109	20	3	25	33	15	15	30	3	5	113
		26%	24%	39%	16%	36%	32%	22%	26%	25%	10%	14%	25%
			a				ij		i	i			
Not very important	(2)	69	59	9	2	13	14	8	7	12	8	6	58
		14%	13%	17%	13%	18%	13%	12%	13%	10%	25%	15%	13%
										h			
Not important at all	(1)	52	47	4	2	10	4	6	6	16	6	3	48
		10%	11%	8%	10%	14%	4%	9%	11%	13%	19%	8%	11%
						e			e	e	e		
Don't know		58	54	3	2	4	13	9	6	12	5	7	56
		11%	12%	6%	12%	6%	12%	14%	10%	10%	17%	19%	12%
			b								d		
<b>NETS</b>													
Net: Important		325	289	36	12	43	74	44	38	80	12	22	293
		65%	64%	68%	65%	62%	71%	65%	66%	67%	39%	58%	64%
						i	i	i	i	i		i	
Net: Not important		120	107	13	4	22	17	14	14	27	13	8	106
		24%	24%	26%	23%	32%	17%	21%	24%	23%	44%	22%	23%
						e				efghj			
Mean score		3.1	3.1	2.9	3.2	2.8	3.2	3.2	3.0	3.1	2.6	3.2	3.1
							di	i		i		di	
Standard deviation		1.03	1.04	.93	1.09	1.02	.85	1.02	1.05	1.08	1.21	1.06	1.04
Standard error		.05	.06	.07	.27	.13	.08	.15	.13	.13	.19	.14	.05

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

## LCCI - Topical Q2 2019

**Q3a\_3. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising restrictions on the quantity of goods/services that can be traded with the EU

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 195 39%	107 42%	89 35%	21 33%	158 39%	17 51%	28 31%	167 41%	59 30%	136 45%	64 44%	117 35%	14 55%
Fairly important	(3) 130 26%	66 26%	64 26%	22 34%	95 23%	13 40%	31 35%	99 24%	56 28%	73 24%	42 29%	81 24%	6 26%
Not very important	(2) 69 14%	32 13%	36 15%	9 14%	57 14%	2 7%	19 22%	49 12%	29 15%	39 13%	16 11%	50 15%	3 11%
Not important at all	(1) 52 10%	24 10%	27 11%	9 14%	43 11%	- -	8 9%	43 10%	23 12%	29 9%	13 9%	39 12%	- -
Don't know	58 11%	24 10%	34 13%	3 5%	54 13%	* 1%	3 3%	55 13%	30 15%	28 9%	11 7%	45 14%	2 8%
<b>NETS</b>													
Net: Important	325 65%	172 68%	153 61%	42 67%	252 62%	30 91%	59 66%	266 64%	116 58%	209 69%	106 73%	198 60%	20 80%
Net: Not important	120 24%	57 22%	64 25%	18 28%	100 25%	2 7%	28 31%	93 22%	53 26%	68 22%	29 20%	89 27%	3 11%
Mean score	3.1	3.1	3.0	2.9	3.0	3.4	2.9	3.1	2.9	3.1	3.2	3.0	3.5
Standard deviation	1.03	1.01	1.04	1.04	1.05	.64	.97	1.04	1.04	1.01	.98	1.06	.72
Standard error	.05	.06	.07	.11	.06	.10	.08	.06	.07	.06	.08	.06	.16

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

## LCCI - Topical Q2 2019

**Q3a\_4. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**UK control over the extent to which UK businesses will have to comply with EU product standards (e.g. labelling or certification)**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 170 34%	152 34%	18 35%	7 40%	26 37%	35 34%	20 31%	16 29%	45 38%	9 31%	11 28%	17 35%	153 34%
Fairly important	(3) 158 31%	139 31%	19 36%	6 35%	25 36%	37 36%	27 41%	15 27%	33 28%	6 19%	7 19%	19 39%	139 31%
Not very important	(2) 66 13%	57 13%	9 17%	* 2%	7 10%	8 8%	10 15%	14 24% de	16 14%	4 13%	7 18% e	5 10%	61 13%
Not important at all	(1) 51 10%	48 11% b	3 6%	2 10%	6 9%	9 9%	4 5%	6 11%	14 12%	6 20% f	5 12%	5 11%	46 10%
Don't know	58 12%	55 12% b	3 6%	2 13%	6 9%	14 14%	5 8%	6 10%	11 9%	5 17%	8 22% dfh	2 5%	56 12%
<b>NETS</b>													
Net: Important	328 65%	290 64%	37 71%	14 75%	51 73%	72 69%	48 72%	32 55%	78 66%	15 50%	18 48%	36 74%	291 64%
Net: Not important	117 23%	105 23%	12 23%	2 12%	13 18%	18 17%	14 20%	20 35% de	30 25%	10 33% e	12 31% e	10 21%	107 24%
Mean score	3.0	3.0	3.1	3.2	3.1	3.1	3.1	2.8	3.0	2.7	2.8	3.0	3.0
Standard deviation	1.00	1.01	.89	.98	.94	.95	.86	1.03	1.04	1.21	1.11	.98	1.00
Standard error	.05	.06	.07	.25	.13	.10	.12	.13	.13	.19	.15	.14	.05

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



## LCCI - Topical Q2 2019

**Q3a\_4. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**UK control over the extent to which UK businesses will have to comply with EU product standards (e.g. labelling or certification)**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	*l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 170 34%	82 32%	88 35%	19 29%	137 34%	15 45%	34 38%	136 33%	53 27%	117 38% h	58 40% k	100 30%	12 49%
Fairly important	(3) 158 31%	78 31%	80 32%	29 45% d	114 28%	15 44% d	32 36%	126 30%	55 28%	103 34%	52 36%	98 30%	8 30%
Not very important	(2) 66 13%	38 15%	28 11%	6 10%	60 15% e	* 2%	12 13%	54 13%	31 16%	35 12%	17 11%	48 15%	1 4%
Not important at all	(1) 51 10%	29 11%	22 9%	7 11%	42 10%	3 8%	6 7%	45 11%	26 13%	26 8%	11 7%	39 12%	2 8%
Don't know	58 12%	26 10%	32 13%	3 5%	54 13% ce	1 2%	6 6%	52 13% f	34 17% i	24 8%	9 6%	47 14% j	2 8%
<b>NETS</b>													
Net: Important	328 65%	160 63%	168 67%	47 75% d	251 62%	29 89% d	66 74% g	262 63%	108 54%	220 72% h	109 75% k	198 60%	20 79%
Net: Not important	117 23%	67 27%	50 20%	13 20%	101 25% e	3 9%	18 20%	100 24%	57 29% i	61 20%	27 19%	87 26%	3 12%
Mean score	3.0	2.9	3.1	3.0	3.0	3.3	3.1	3.0	2.8	3.1 h	3.1 k	2.9	3.3
Standard deviation	1.00	1.02	.97	.93	1.02	.87	.91	1.02	1.05	.95	.92	1.03	.94
Standard error	.05	.06	.07	.09	.06	.14	.07	.06	.07	.06	.08	.06	.21

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

## LCCI - Topical Q2 2019

**Q3a\_5. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**UK control over the extent to which UK businesses will have to comply with EU employment law (e.g. the working time directive)**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important (4)	135	119	16	4	24	21	20	10	41	5	10	14	121
	27%	26%	31%	21%	34% egi	20%	30%	18%	34% egi	16%	27%	29%	27%
Fairly important (3)	151	128	23	5	17	45	18	22	32	7	5	14	136
	30%	28%	44% a	25%	24%	43% dhij	28%	38% j	27%	22%	14%	29%	30%
Not very important (2)	89	83	7	2	18	13	15	11	14	6	9	11	79
	18%	18%	13%	12%	26% eh	12%	23%	20%	12%	21%	25% eh	22%	17%
Not important at all (1)	60	57	4	5	7	8	7	7	17	6	3	8	53
	12%	13%	7%	29%	9%	8%	11%	12%	15%	21% e	9%	16%	12%
Don't know	67	64	3	2	4	17	5	8	15	6	10	2	65
	13%	14% b	6%	12%	6%	17% d	8%	13%	12%	20% d	26% dfh	5%	14%
<b>NETS</b>													
Net: Important	286	247	39	8	41	66	39	32	73	11	16	28	257
	57%	55%	74% a	46%	58% i	63% ij	58%	55%	61% ij	38%	41%	58%	57%
Net: Not important	150	139	10	8	25	21	23	18	31	12	12	18	132
	30%	31% b	20%	41%	36% e	20%	34%	31%	26%	42% e	33% e	37%	29%
Mean score	2.8	2.8	3.0 a	2.4	2.9 i	2.9 i	2.8	2.7	2.9 i	2.4	2.8	2.7	2.8
Standard deviation	1.02	1.04	.89	1.22	1.02	.87	1.02	.95	1.09	1.10	1.08	1.07	1.02
Standard error	.05	.06	.07	.31	.14	.09	.14	.12	.13	.18	.15	.16	.05

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

## LCCI - Topical Q2 2019

**Q3a\_5. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**UK control over the extent to which UK businesses will have to comply with EU employment law (e.g. the working time directive)**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	*l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 135 27%	67 27%	68 27%	18 28%	109 27%	9 27%	30 34%	105 25%	44 22%	91 30% h	43 30%	83 25%	9 37%
Fairly important	(3) 151 30%	77 30%	74 30%	30 48% d	107 26%	14 41% d	36 40% g	115 28%	57 29%	94 31%	49 34%	93 28%	8 32%
Not very important	(2) 89 18%	42 17%	47 19%	6 9%	78 19% c	6 17%	12 13%	78 19%	32 16%	58 19%	25 17%	60 18%	4 17%
Not important at all	(1) 60 12%	35 14%	26 10%	7 11%	51 12%	3 9%	7 8%	53 13%	27 14%	33 11%	13 9%	46 14%	2 6%
Don't know	67 13%	32 13%	35 14%	3 5%	62 15% c	2 6%	5 6%	62 15% f	38 19% i	29 10%	15 10%	50 15%	2 8%
<b>NETS</b>													
Net: Important	286 57%	144 57%	142 57%	48 76% d	216 53%	22 68%	66 74% g	220 53%	101 51%	185 61% h	93 64% k	176 53%	17 69%
Net: Not important	150 30%	77 30%	73 29%	12 20%	129 32% c	9 26%	19 21%	131 32% f	59 30%	91 30%	38 26%	106 32%	6 23%
Mean score	2.8	2.8	2.9	3.0	2.8	2.9	3.1 g	2.8	2.7	2.9	2.9	2.8	3.1
Standard deviation	1.02	1.04	1.00	.92	1.04	.94	.92	1.04	1.04	1.00	.96	1.05	.94
Standard error	.05	.07	.07	.09	.06	.15	.07	.06	.07	.06	.08	.06	.20

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

## LCCI - Topical Q2 2019

**Q3a\_6. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Allowing the UK government to set restrictions on trade with the EU to protect UK business

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
		a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454	
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	(4)	113	96	17	4	22	26	16	10	21	5	9	19	94
		22%	21%	33%	22%	32%	25%	23%	17%	17%	17%	23%	38%	21%
			a			gh							l	
Fairly important	(3)	134	117	17	3	16	24	23	13	42	5	9	8	126
		27%	26%	32%	15%	23%	23%	34%	22%	35%	18%	23%	16%	28%
									i					
Not very important	(2)	95	83	12	6	14	23	7	15	16	9	6	13	82
		19%	18%	22%	32%	20%	22%	10%	26%	14%	29%	16%	27%	18%
									f		fh			
Not important at all	(1)	77	74	3	2	10	13	9	14	21	3	5	4	73
		15%	16%	6%	10%	14%	13%	14%	24%	18%	11%	12%	7%	16%
			b											
Don't know		85	81	4	4	8	17	13	6	19	8	9	6	79
		17%	18%	7%	22%	12%	17%	19%	11%	16%	26%	25%	12%	17%
			b							g	g			
<b>NETS</b>														
Net: Important		247	213	34	7	38	51	38	23	62	10	18	26	220
		49%	47%	65%	37%	55%	49%	57%	39%	52%	35%	46%	54%	49%
				a		i		i						
Net: Not important		172	157	15	8	24	36	16	29	37	12	11	17	155
		34%	35%	28%	41%	34%	35%	24%	50%	31%	39%	29%	34%	34%
									efhj					
Mean score		2.7	2.6	3.0	2.6	2.8	2.7	2.8	2.4	2.6	2.6	2.8	3.0	2.6
			a			g	g	g				g		
Standard deviation		1.06	1.07	.93	1.06	1.10	1.06	1.04	1.08	1.04	1.02	1.08	1.05	1.06
Standard error		.05	.07	.07	.27	.15	.11	.15	.14	.13	.17	.15	.16	.05

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

## LCCI - Topical Q2 2019

**Q3a\_6. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Allowing the UK government to set restrictions on trade with the EU to protect UK business

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 113 22%	60 24%	53 21%	25 40% d	80 20%	8 24%	30 34%	83 20% g	51 25%	63 21%	36 25%	70 21%	6 25%
Fairly important	(3) 134 27%	60 24%	73 29%	20 32%	101 25%	13 39%	29 33%	104 25% g	54 27%	79 26%	46 32%	81 25%	6 24%
Not very important	(2) 95 19%	50 20%	44 18%	8 12%	83 20%	5 15%	12 13%	83 20% h	25 13%	70 23% h	21 14%	66 20%	8 34%
Not important at all	(1) 77 15%	42 16%	35 14%	7 12%	65 16%	4 12%	9 10%	68 16% f	25 13%	51 17%	16 11%	58 18%	2 8%
Don't know	85 17%	41 16%	43 17%	3 5%	78 19% c	4 11%	10 11%	75 18% f	43 22% i	42 14%	26 18%	57 17%	2 8%
<b>NETS</b>													
Net: Important	247 49%	120 47%	127 51%	45 72% d	181 44%	21 62% d	59 66% g	187 45% g	105 53%	142 47%	83 57% k	152 46%	12 50%
Net: Not important	172 34%	92 36%	79 32%	15 23% c	148 36% c	9 27%	21 23%	151 37% f	51 26%	121 40% h	37 25%	124 37% j	11 42%
Mean score	2.7	2.6	2.7	3.0 d	2.6	2.8	3.0 g	2.6	2.8 i	2.6	2.9 k	2.6	2.7
Standard deviation	1.06	1.09	1.03	1.02	1.06	.99	.99	1.07	1.06	1.06	1.01	1.09	.99
Standard error	.05	.07	.08	.10	.06	.16	.08	.06	.07	.07	.09	.07	.22

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

## LCCI - Topical Q2 2019

**Q3a\_7. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising restrictions to the free movement of workers between the UK and the EU

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
		a	b	*c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4)	198	180	18	9	21	45	24	24	47	10	18	182
		39%	40%	34%	50%	30%	43%	36%	42%	40%	33%	46%	40%
											d		
Fairly important	(3)	130	111	19	5	26	31	23	11	21	8	6	113
		26%	25%	37%	25%	37%	29%	35%	19%	18%	27%	16%	25%
				a		ghj	j	ghj					
Not very important	(2)	65	56	9	2	12	8	6	11	16	5	5	56
		13%	13%	17%	12%	17%	7%	10%	20%	14%	16%	13%	12%
						e							
Not important at all	(1)	57	52	4	*	8	7	8	8	22	3	2	53
		11%	12%	8%	1%	11%	6%	12%	14%	18%	10%	5%	12%
									ej				
Don't know		53	51	2	2	4	14	5	3	13	4	7	51
		11%	11%	4%	12%	6%	14%	8%	5%	11%	14%	19%	11%
			b									dg	
<b>NETS</b>													
Net: Important		328	291	37	14	46	76	47	35	69	18	24	295
		65%	65%	71%	75%	66%	73%	71%	61%	58%	60%	62%	65%
							h						
Net: Not important		122	109	13	2	19	14	14	19	38	8	7	109
		24%	24%	25%	13%	28%	14%	21%	34%	32%	26%	18%	24%
						e		ej	e				
Mean score		3.0	3.0	3.0	3.4	2.9	3.3	3.0	2.9	2.9	3.0	3.3	3.1
							dgh					dh	
Standard deviation		1.04	1.06	.95	.77	.99	.90	1.01	1.12	1.19	1.03	.98	1.05
Standard error		.05	.06	.07	.19	.13	.09	.14	.14	.14	.16	.13	.05

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

## LCCI - Topical Q2 2019

Q3a\_7. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?

### Minimising restrictions to the free movement of workers between the UK and the EU

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	*l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 198	115	83	23	160	15	35	163	70	128	71	115	12
	39%	45%	33%	36%	39%	46%	39%	39%	35%	42%	48%	35%	47%
		b		k									
Fairly important	(3) 130	58	72	26	98	6	33	98	52	78	42	82	6
	26%	23%	29%	41%	24%	19%	36%	24%	26%	26%	29%	25%	23%
				de			g						
Not very important	(2) 65	28	37	7	50	8	15	50	24	41	17	45	3
	13%	11%	15%	12%	12%	25%	17%	12%	12%	13%	11%	14%	13%
						cd							
Not important at all	(1) 57	26	31	5	49	3	4	53	23	34	9	46	2
	11%	10%	12%	8%	12%	8%	5%	13%	12%	11%	6%	14%	8%
							f	j				j	
Don't know	53	27	26	2	50	*	3	50	29	24	7	44	2
	11%	10%	11%	4%	12%	1%	3%	12%	15%	8%	5%	13%	8%
					ce			f	i			j	
<b>NETS</b>													
Net: Important	328	173	155	48	258	22	67	261	122	206	113	198	18
	65%	68%	62%	77%	63%	66%	75%	63%	61%	68%	77%	59%	70%
				d			g				k		
Net: Not important	122	54	68	12	99	11	19	103	48	75	26	91	5
	24%	21%	27%	19%	24%	33%	22%	25%	24%	25%	18%	27%	21%
												j	
Mean score	3.0	3.2	2.9	3.1	3.0	3.0	3.1	3.0	3.0	3.1	3.3	2.9	3.2
		b									k		
Standard deviation	1.04	1.03	1.04	.91	1.07	1.04	.87	1.08	1.05	1.04	.91	1.09	1.02
Standard error	.05	.06	.07	.09	.06	.17	.07	.06	.07	.07	.07	.06	.22

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

## LCCI - Topical Q2 2019

**Q3a\_8. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**Restricting UK public procurement to UK business, even if this means UK business cannot bid for EU public procurement**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4)	69	57	12	2	9	24	5	5	13	2	8	60
		14%	13%	22%	12%	13%	23%	7%	9%	11%	8%	22%	13%
			a			fg					fg		
Fairly important	(3)	145	125	19	6	26	26	24	9	37	8	9	122
		29%	28%	37%	33%	37%	25%	36%	16%	31%	26%	25%	27%
			a			g		g		g		l	
Not very important	(2)	97	86	11	4	19	16	6	15	26	6	6	87
		19%	19%	20%	23%	27%	15%	8%	26%	22%	19%	15%	19%
						f		f		f			
Not important at all	(1)	91	86	5	2	10	17	17	13	22	6	4	88
		18%	19%	10%	10%	15%	17%	26%	22%	18%	21%	12%	19%
			b				j					k	
Don't know		101	96	5	4	6	21	15	15	22	8	10	97
		20%	21%	10%	22%	9%	20%	22%	27%	19%	27%	27%	21%
			b					d		d		d	k
<b>NETS</b>													
Net: Important		214	183	31	8	35	50	29	15	50	10	17	182
		43%	41%	60%	46%	49%	48%	44%	25%	42%	34%	46%	40%
			a			g	g	g		g		l	
Net: Not important		188	172	16	6	29	33	23	28	47	12	10	175
		37%	38%	30%	32%	42%	32%	34%	48%	40%	39%	27%	39%
								ej					
Mean score		2.5	2.4	2.8	2.6	2.5	2.7	2.3	2.2	2.4	2.3	2.8	2.4
			a				g					l	
Standard deviation		1.02	1.03	.95	.93	.93	1.11	1.05	1.01	.98	1.02	1.06	1.04
Standard error		.05	.07	.07	.24	.12	.12	.16	.14	.12	.17	.15	.05

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



## LCCI - Topical Q2 2019

**Q3a\_8. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**Restricting UK public procurement to UK business, even if this means UK business cannot bid for EU public procurement**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 69 14%	29 12%	40 16%	16 25% d	45 11%	9 27% d	20 22% g	49 12%	29 14%	40 13%	25 17%	38 11%	6 25%
Fairly important	(3) 145 29%	75 30%	70 28%	28 44% d	107 26%	10 30%	37 41% g	108 26%	57 29%	87 29%	44 30%	97 29%	4 15%
Not very important	(2) 97 19%	51 20%	45 18%	8 13%	83 20%	5 17%	11 13%	85 21% f	39 20%	58 19%	31 21%	56 17%	9 37%
Not important at all	(1) 91 18%	56 22% b	36 14%	8 13%	80 20%	3 9%	9 10%	82 20% f	30 15%	61 20%	20 14%	69 21%	2 9%
Don't know	101 20%	42 17%	59 24% a	4 6%	92 23% c	6 17% c	12 14%	89 22% f	43 22%	58 19%	26 18%	71 21%	4 15%
<b>NETS</b>													
Net: Important	214 43%	104 41%	109 44%	43 68% d	152 37%	19 57% d	57 64% g	157 38%	86 43%	128 42%	69 47%	135 41%	10 40%
Net: Not important	188 37%	107 42% b	81 32%	16 26%	163 40% c	9 26%	20 23%	167 40% f	69 35%	119 39%	51 35%	126 38%	11 46%
Mean score	2.5	2.4	2.6 a	2.8 d	2.4	2.9 d	2.9 g	2.4	2.5	2.4	2.6 k	2.4	2.6
Standard deviation	1.02	1.02	1.02 a	.97 d	1.01	1.00 d	.93 g	1.02	1.01	1.04	1.00 k	1.03	1.03
Standard error	.05	.07	.08	.10	.06	.17	.08	.06	.07	.07	.09	.06	.24

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

## LCCI - Topical Q2 2019

**Q3a\_9. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Limiting the free movement of capital between the UK and the EU

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important (4)	123	107	16	2	17	35	19	14	21	4	11	8	114
	24%	24%	30%	12%	25%	34%	28%	24%	17%	12%	29%	17%	25%
						hi					i		
Fairly important (3)	103	89	14	4	15	23	12	8	29	9	4	11	92
	21%	20%	28%	21%	21%	22%	18%	15%	24%	30%	12%	23%	20%
			a							gj			
Not very important (2)	90	76	14	6	14	18	8	13	20	3	8	15	74
	18%	17%	26%	35%	20%	17%	13%	22%	16%	11%	21%	31%	16%
			a									l	
Not important at all (1)	106	102	4	4	11	13	15	18	35	7	4	5	101
	21%	23%	8%	20%	16%	12%	23%	31%	29%	23%	10%	11%	22%
		b						dej	ej				
Don't know	81	77	4	2	13	16	13	4	15	7	11	8	72
	16%	17%	8%	12%	18%	15%	19%	8%	13%	24%	29%	17%	16%
		b							g		egh		
<b>NETS</b>													
Net: Important	226	196	30	6	32	58	31	22	49	13	15	20	207
	45%	43%	58%	33%	46%	56%	46%	39%	41%	42%	40%	40%	45%
			a			gj							
Net: Not important	196	178	18	10	25	31	23	31	55	10	12	21	175
	39%	39%	34%	55%	36%	29%	35%	53%	46%	34%	31%	43%	39%
						efij		e					
Mean score	2.6	2.5	2.9	2.3	2.7	2.9	2.6	2.3	2.3	2.4	2.8	2.6	2.6
			a			ghi					gh		
Standard deviation	1.15	1.17	.98	1.00	1.11	1.09	1.23	1.21	1.14	1.10	1.13	.97	1.17
Standard error	.06	.07	.07	.25	.16	.11	.18	.15	.14	.18	.16	.15	.06

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

## LCCI - Topical Q2 2019

**Q3a\_9. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Limiting the free movement of capital between the UK and the EU

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	*l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 123 24%	60 24%	63 25%	19 30%	89 22%	14 44%	24 27%	99 24%	47 23%	76 25%	42 29%	74 22%	7 28%
Fairly important	(3) 103 21%	54 21%	50 20%	22 34%	75 18%	7 20%	26 29%	77 19%	39 20%	65 21%	38 26%	58 17%	7 29%
Not very important	(2) 90 18%	46 18%	44 18%	9 15%	76 19%	5 14%	16 17%	74 18%	32 16%	57 19%	19 13%	64 19%	7 27%
Not important at all	(1) 106 21%	60 24%	46 18%	8 13%	91 22%	7 20%	17 19%	90 22%	37 19%	69 23%	29 20%	76 23%	2 7%
Don't know	81 16%	34 13%	47 19%	5 8%	75 18%	* 1%	7 8%	73 18%	44 22%	37 12%	18 13%	60 18%	2 8%
<b>NETS</b>													
Net: Important	226 45%	113 45%	113 45%	41 64%	165 40%	21 64%	50 56%	176 43%	85 43%	141 46%	80 55%	132 40%	14 58%
Net: Not important	196 39%	106 42%	90 36%	17 27%	167 41%	11 34%	32 36%	164 40%	69 35%	127 42%	47 32%	140 42%	9 34%
Mean score	2.6	2.5	2.6	2.9	2.5	2.9	2.7	2.5	2.6	2.6	2.7	2.5	2.9
Standard deviation	1.15	1.16	1.15	1.03	1.16	1.20	1.10	1.17	1.15	1.16	1.14	1.16	.96
Standard error	.06	.07	.08	.11	.07	.19	.09	.07	.08	.08	.10	.07	.21

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

## LCCI - Topical Q2 2019

**Q3b\_SUM. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### SUMMARY TABLE

Base: All respondents excl. don't know

	Total	Very important	Fairly important	Not very important	Not important at all	NETS		Mean
						Important	Not important	
Minimising customs procedures on trade with the EU (e.g. proof of origin of goods)	450 100%	232 52%	137 30%	50 11%	31 7%	369 82%	81 18%	3.3
Minimising import/export licensing requirements on trade with the EU (i.e. procedures other than those required for customs)	427 100%	214 50%	125 29%	53 12%	34 8%	340 80%	87 20%	3.2
Minimising restrictions to the free movement of workers between the UK and the EU	450 100%	198 44%	130 29%	65 15%	57 13%	328 73%	122 27%	3.0
UK control over the extent to which UK businesses will have to comply with EU product standards (e.g. labelling or certification)	445 100%	170 38%	158 35%	66 15%	51 12%	328 74%	117 26%	3.0
Minimising restrictions on the quantity of goods/services that can be traded with the EU	445 100%	195 44%	130 29%	69 15%	52 12%	325 73%	120 27%	3.1
UK control over the extent to which UK businesses will have to comply with EU employment law (e.g. the working time directive)	436 100%	135 31%	151 35%	89 21%	60 14%	286 66%	150 34%	2.8
Allowing the UK government to set restrictions on trade with the EU to protect UK business	418 100%	113 27%	134 32%	95 23%	77 18%	247 59%	172 41%	2.7

**LCCI - Topical Q2 2019**

**Q3b\_SUM. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**SUMMARY TABLE**

Base: All respondents excl. don't know

	Total	Very important	Fairly important	Not very important	Not important at all	NETS		Mean
						Important	Not important	
Limiting the free movement of capital between the UK and the EU	422 100%	123 29%	103 25%	90 21%	106 25%	226 54%	196 46%	2.6
Restricting UK public procurement to UK business, even if this means UK business cannot bid for EU public procurement	402 100%	69 17%	145 36%	97 24%	91 23%	214 53%	188 47%	2.5

## LCCI - Topical Q2 2019

**Q3b\_1. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising customs procedures on trade with the EU (e.g. proof of origin of goods)

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	453	273	180	16	57	102	48	62	71	40	57	47	406
Weighted Total	450	401	49	16	66	93	56	52	112	25	30	47	403
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4)	232	213	19	9	26	49	29	23	64	12	20	214
		52%	53%	38%	57%	40%	52%	51%	44%	57%	49%	68%	53%
		b							d		dg		k
Fairly important	(3)	137	118	19	5	24	31	21	14	31	6	4	118
		30%	30%	38%	32%	37%	33%	38%	28%	28%	23%	13%	29%
		a			j	j	j	j	j				
Not very important	(2)	50	42	8	2	7	8	2	13	8	5	4	42
		11%	10%	17%	11%	11%	8%	4%	25%	7%	21%	15%	10%
		a						efh		efh			
Not important at all	(1)	31	28	3	-	8	5	4	2	9	2	1	29
		7%	7%	6%	-	12%	6%	7%	4%	8%	7%	4%	7%
<b>NETS</b>													
Net: Important		369	332	37	14	50	80	50	38	96	18	24	333
		82%	83%	77%	89%	77%	86%	89%	72%	85%	72%	81%	83%
							g	gi					
Net: Not important		81	69	11	2	15	13	6	15	7	6	10	70
		18%	17%	23%	11%	23%	14%	11%	28%	15%	28%	19%	17%
								ef		f			
Mean score		3.3	3.3	3.1	3.5	3.0	3.3	3.3	3.1	3.3	3.1	3.5	3.3
			b								dg		
Standard deviation		.91	.91	.90	.71	1.00	.86	.85	.91	.92	1.00	.90	.92
Standard error		.04	.06	.07	.18	.13	.09	.12	.12	.11	.16	.12	.05

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

## LCCI - Topical Q2 2019

**Q3b\_1. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising customs procedures on trade with the EU (e.g. proof of origin of goods)

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	453	253	200	97	317	39	152	301	207	246	148	283	22
Weighted Total	450	229	221	61	357	33	87	363	172	278	136	289	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 232 52%	118 51%	114 52%	25 41%	190 53% c	17 53%	37 42%	196 54% f	75 44%	157 57% h	64 47%	156 54%	12 47%
Fairly important	(3) 137 30%	72 31%	65 30%	21 35%	106 30% c	10 31%	37 42% g	101 28%	53 31%	84 30%	49 36%	79 27%	9 35%
Not very important	(2) 50 11%	27 12%	23 11%	10 17% d	34 10%	5 16%	12 13%	38 11%	28 16% i	22 8%	18 13%	27 10%	5 18%
Not important at all	(1) 31 7%	13 6%	18 8%	4 7%	26 7%	- -	2 2%	29 8% f	16 9%	14 5%	4 3%	27 9% j	- -
<b>NETS</b>													
Net: Important	369 82%	190 83%	179 81%	46 76%	296 83%	27 84%	73 84%	296 82%	128 74%	242 87% h	114 84%	235 81%	21 82%
Net: Not important	81 18%	39 17%	41 19%	15 24%	61 17%	5 16%	14 16%	67 18%	44 26% i	37 13%	22 16%	54 19%	5 18%
Mean score	3.3	3.3	3.2	3.1	3.3	3.4	3.2	3.3	3.1	3.4 h	3.3	3.3	3.3
Standard deviation	.91	.88	.94	.93	.92	.76	.77	.94	.99	.84	.81	.97	.77
Standard error	.04	.06	.07	.09	.05	.12	.06	.05	.07	.05	.07	.06	.16

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

## LCCI - Topical Q2 2019

**Q3b\_2. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising import/export licensing requirements on trade with the EU (i.e. procedures other than those required for customs)

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	437	260	177	16	55	96	48	60	67	39	56	46	391
Weighted Total	427	380	47	16	62	84	56	50	105	24	29	45	382
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important (4)	214	198	17	8	24	42	33	21	54	11	20	14	200
	50%	52%	36%	47%	39%	51%	60%	42%	51%	47%	69%	32%	52%
Fairly important (3)	125	106	19	4	26	32	13	13	30	5	3	19	107
	29%	28%	41%	24%	42%	38%	22%	26%	29%	19%	9%	41%	28%
Not very important (2)	53	45	9	3	6	5	4	13	12	5	5	8	45
	12%	12%	18%	17%	10%	5%	8%	25%	12%	22%	17%	19%	12%
Not important at all (1)	34	32	3	2	6	5	6	3	9	3	1	4	31
	8%	8%	6%	11%	9%	6%	11%	6%	8%	12%	4%	8%	8%
<b>NETS</b>													
Net: Important	340	304	36	11	50	74	46	34	84	16	23	33	307
	80%	80%	76%	72%	81%	89%	82%	69%	80%	66%	79%	73%	80%
Net: Not important	87	76	11	5	12	9	10	16	21	8	6	12	75
	20%	20%	24%	28%	19%	11%	18%	31%	20%	34%	21%	27%	20%
Mean score	3.2	3.2	3.1	3.1	3.1	3.3	3.3	3.0	3.2	3.0	3.4	3.0	3.2
Standard deviation	.95	.96	.88	1.08	.92	.83	1.01	.97	.96	1.10	.93	.92	.95
Standard error	.05	.06	.07	.27	.12	.08	.15	.13	.12	.18	.12	.14	.05

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



## LCCI - Topical Q2 2019

**Q3b\_2. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising import/export licensing requirements on trade with the EU (i.e. procedures other than those required for customs)

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	437	248	189	95	303	39	148	289	199	238	143	273	21
Weighted Total	427	223	204	60	335	33	82	345	158	269	130	274	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 214 50%	120 54%	94 46%	25 42%	175 52%	15 46%	37 46%	177 51%	70 44%	145 54% h	67 51%	138 50%	10 44%
Fairly important	(3) 125 29%	64 29%	61 30%	21 36%	91 27%	13 41%	29 36%	96 28%	49 31%	77 28%	41 32%	74 27%	10 44%
Not very important	(2) 53 12%	19 9%	34 16% a	10 16%	39 12%	4 13%	11 13%	42 12%	20 13%	33 12%	15 12%	35 13%	3 12%
Not important at all	(1) 34 8%	19 8%	16 8%	4 6%	31 9%	- -	5 6%	30 9%	20 12% i	15 5%	7 6%	27 10%	- -
<b>NETS</b>													
Net: Important	340 80%	185 83%	155 76%	46 77%	265 79%	28 87%	67 81%	273 79%	118 75%	222 82%	108 83%	212 77%	20 88%
Net: Not important	87 20%	38 17%	49 24%	14 23%	70 21%	4 13%	15 19%	72 21%	40 25%	47 18%	23 17%	62 23%	3 12%
Mean score	3.2	3.3	3.1	3.1	3.2	3.3	3.2	3.2	3.1	3.3 h	3.3	3.2	3.3
Standard deviation	.95	.94	.96	.91	.98	.71	.88	.97	1.03	.89	.88	1.00	.70
Standard error	.05	.06	.07	.09	.06	.11	.07	.06	.07	.06	.07	.06	.15

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

## LCCI - Topical Q2 2019

**Q3b\_3. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising restrictions on the quantity of goods/services that can be traded with the EU

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	453	271	182	16	57	101	49	64	68	40	58	47	406
Weighted Total	445	396	49	16	66	92	58	52	108	25	30	47	398
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4)	195	180	15	9	18	41	29	23	50	9	17	180
		44%	45%	31%	56%	28%	44%	50%	44%	47%	36%	55%	45%
		b				d	d		d	d			
Fairly important	(3)	130	109	20	3	25	33	15	15	30	3	5	113
		29%	28%	42%	18%	38%	37%	26%	29%	28%	11%	17%	36%
		a			ij	ij	ij	i	i	i			
Not very important	(2)	69	59	9	2	13	14	8	7	12	8	6	58
		15%	15%	19%	15%	19%	15%	14%	14%	11%	30%	18%	23%
										eh			
Not important at all	(1)	52	47	4	2	10	4	6	6	16	6	3	48
		12%	12%	9%	11%	15%	4%	10%	13%	15%	22%	10%	8%
					e			e	e	e			
<b>NETS</b>													
Net: Important		325	289	36	12	43	74	44	38	80	12	22	293
		73%	73%	73%	74%	66%	81%	76%	73%	75%	47%	72%	73%
							di	i	i	i		i	
Net: Not important		120	107	13	4	22	17	14	14	27	13	8	106
		27%	27%	27%	26%	34%	19%	24%	27%	25%	53%	28%	31%
					e					efghj			
Mean score		3.1	3.1	2.9	3.2	2.8	3.2	3.2	3.0	3.1	2.6	3.2	2.9
							di	i		i		di	
Standard deviation		1.03	1.04	.93	1.09	1.02	.85	1.02	1.05	1.08	1.21	1.06	.94
Standard error		.05	.06	.07	.27	.13	.08	.15	.13	.13	.19	.14	.05

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

## LCCI - Topical Q2 2019

**Q3b\_3. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising restrictions on the quantity of goods/services that can be traded with the EU

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	453	256	197	97	317	39	153	300	208	245	148	284	21	
Weighted Total	445	229	216	60	353	33	87	359	168	277	135	287	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	(4)	195	107	89	21	158	17	28	167	59	136	64	117	14
		44%	47%	41%	35%	45%	52%	32%	47%	35%	49%	48%	41%	60%
								f		h				
Fairly important	(3)	130	66	64	22	95	13	31	99	56	73	42	81	6
		29%	29%	30%	36%	27%	41%	36%	27%	33%	26%	31%	28%	28%
Not very important	(2)	69	32	36	9	57	2	19	49	29	39	16	50	3
		15%	14%	17%	15%	16%	7%	22%	14%	17%	14%	12%	17%	12%
								g						
Not important at all	(1)	52	24	27	9	43	-	8	43	23	29	13	39	-
		12%	11%	13%	14%	12%	-	10%	12%	14%	10%	9%	14%	-
					e	e								
<b>NETS</b>														
Net: Important	325	172	153	42	252	30	59	266	116	209	106	198	20	
	73%	75%	71%	71%	72%	93%	68%	74%	69%	76%	79%	69%	88%	
						cd					k			
Net: Not important	120	57	64	18	100	2	28	93	53	68	29	89	3	
	27%	25%	29%	29%	28%	7%	32%	26%	31%	24%	21%	31%	12%	
				e	e							j		
Mean score	3.1	3.1	3.0	2.9	3.0	3.4	2.9	3.1	2.9	3.1	3.2	3.0	3.5	
						cd				h				
Standard deviation	1.03	1.01	1.04	1.04	1.05	.64	.97	1.04	1.04	1.01	.98	1.06	.72	
Standard error	.05	.06	.07	.11	.06	.10	.08	.06	.07	.06	.08	.06	.16	

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

## LCCI - Topical Q2 2019

**Q3b\_4. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### UK control over the extent to which UK businesses will have to comply with EU product standards (e.g. labelling or certification)

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	450	270	180	15	56	99	51	64	69	40	56	46	404
Weighted Total	445	396	49	16	64	90	61	52	108	25	30	47	398
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important (4)	170 38%	152 38%	18 37%	7 46%	26 40%	35 39%	20 33%	16 32%	45 42%	9 37%	11 36%	17 37%	153 38%
Fairly important (3)	158 35%	139 35%	19 39%	6 40%	25 39%	37 41%	27 45%	15 30%	33 31%	6 23%	7 25%	19 41%	139 35%
Not very important (2)	66 15%	57 14%	9 18%	* 3%	7 11%	8 9%	10 16%	14 26%	16 15%	4 16%	7 23%	5 10%	61 15%
Not important at all (1)	51 12%	48 12%	3 6%	2 11%	6 9%	9 11%	4 6%	6 12%	14 13%	6 23%	5 16%	5 12%	46 12%
<b>NETS</b>		b				ij	ij	de		f			
Net: Important	328 74%	290 73%	37 76%	14 86%	51 80%	72 80%	48 78%	32 62%	78 72%	15 61%	18 61%	36 78%	291 73%
Net: Not important	117 26%	105 27%	12 24%	2 14%	13 20%	18 20%	14 22%	20 38%	30 28%	10 39%	12 39%	10 22%	107 27%
Mean score	3.0	3.0	3.1	3.2	3.1	3.1	3.1	2.8	3.0	2.7	2.8	3.0	3.0
Standard deviation	1.00	1.01	.89	.98	.94	.95	.86	1.03	1.04	1.21	1.11	.98	1.00
Standard error	.05	.06	.07	.25	.13	.10	.12	.13	.13	.19	.15	.14	.05

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

## LCCI - Topical Q2 2019

**Q3b\_4. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**UK control over the extent to which UK businesses will have to comply with EU product standards (e.g. labelling or certification)**

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	450	252	198	97	315	38	148	302	204	246	148	281	21	
Weighted Total	445	227	218	60	353	32	84	361	164	280	137	285	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	(4)	170	82	88	19	137	15	34	136	53	117	58	100	12
		38%	36%	40%	31%	39%	46%	41%	38%	32%	42%	42%	35%	54%
Fairly important	(3)	158	78	80	29	114	15	32	126	55	103	52	98	8
		35%	34%	37%	48%	32%	45%	38%	35%	33%	37%	38%	35%	33%
Not very important	(2)	66	38	28	6	60	*	12	54	31	35	17	48	1
		15%	17%	13%	10%	17%	*	14%	15%	19%	13%	12%	17%	4%
Not important at all	(1)	51	29	22	7	42	3	6	45	26	26	11	39	2
		12%	13%	10%	11%	12%	9%	7%	13%	16%	9%	8%	13%	9%
<b>NETS</b>														
Net: Important		328	160	168	47	251	29	66	262	108	220	109	198	20
		74%	70%	77%	79%	71%	91%	79%	72%	66%	78%	80%	70%	87%
Net: Not important		117	67	50	13	101	3	18	100	57	61	27	87	3
		26%	30%	23%	21%	29%	9%	21%	28%	34%	22%	20%	30%	13%
Mean score		3.0	2.9	3.1	3.0	3.0	3.3	3.1	3.0	2.8	3.1	3.1	2.9	3.3
Standard deviation		1.00	1.02	.97	.93	1.02	.87	.91	1.02	1.05	.95	.92	1.03	.94
Standard error		.05	.06	.07	.09	.06	.14	.07	.06	.07	.06	.08	.06	.21

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

## LCCI - Topical Q2 2019

**Q3b\_5. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**UK control over the extent to which UK businesses will have to comply with EU employment law (e.g. the working time directive)**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES		
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	443	262	181	16	57	97	51	61	68	39	54	47	396	
Weighted Total	436	386	49	16	66	87	61	50	105	24	28	47	389	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	(4)	135	119	16	4	24	21	20	10	41	5	10	14	121
		31%	31%	33%	24%	37%	24%	33%	20%	39%	20%	37%	30%	31%
Fairly important	(3)	151	128	23	5	17	45	18	22	32	7	5	14	136
		35%	33%	46%	29%	26%	52%	30%	44%	31%	27%	19%	31%	35%
			a			dfhij		dj						
Not very important	(2)	89	83	7	2	18	13	15	11	14	6	9	11	79
		21%	21%	13%	14%	28%	15%	25%	23%	13%	27%	33%	23%	20%
			b			h						eh		
Not important at all	(1)	60	57	4	5	7	8	7	7	17	6	3	8	53
		14%	15%	8%	33%	10%	9%	12%	13%	17%	26%	11%	16%	14%
			b							de				
<b>NETS</b>														
Net: Important		286	247	39	8	41	66	39	32	73	11	16	28	257
		66%	64%	79%	53%	62%	76%	63%	64%	70%	48%	56%	61%	66%
			a			ij		i						
Net: Not important		150	139	10	8	25	21	23	18	31	12	12	18	132
		34%	36%	21%	47%	38%	24%	37%	36%	30%	52%	44%	39%	34%
			b							eh	e			
Mean score		2.8	2.8	3.0	2.4	2.9	2.9	2.8	2.7	2.9	2.4	2.8	2.7	2.8
			a			i	i			i				
Standard deviation		1.02	1.04	.89	1.22	1.02	.87	1.02	.95	1.09	1.10	1.08	1.07	1.02
Standard error		.05	.06	.07	.31	.14	.09	.14	.12	.13	.18	.15	.16	.05

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

## LCCI - Topical Q2 2019

**Q3b\_5. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**UK control over the extent to which UK businesses will have to comply with EU employment law (e.g. the working time directive)**

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	
		a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	443	249	194	96	309	38	151	292	199	244	146	276	21	
Weighted Total	436	221	215	60	344	31	84	351	160	276	131	282	23	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	(4)	135	67	68	18	109	9	30	105	44	91	43	83	9
		31%	30%	32%	29%	32%	29%	36%	30%	27%	33%	33%	29%	40%
Fairly important	(3)	151	77	74	30	107	14	36	115	57	94	49	93	8
		35%	35%	34%	50%	31%	44%	42%	33%	36%	34%	38%	33%	35%
					d									
Not very important	(2)	89	42	47	6	78	6	12	78	32	58	25	60	4
		21%	19%	22%	10%	23%	18%	14%	22%	20%	21%	19%	21%	18%
					c				f					
Not important at all	(1)	60	35	26	7	51	3	7	53	27	33	13	46	2
		14%	16%	12%	11%	15%	10%	8%	15%	17%	12%	10%	16%	7%
								f						
<b>NETS</b>														
Net: Important		286	144	142	48	216	22	66	220	101	185	93	176	17
		66%	65%	66%	79%	63%	72%	78%	63%	63%	67%	71%	62%	75%
					d			g						
Net: Not important		150	77	73	12	129	9	19	131	59	91	38	106	6
		34%	35%	34%	21%	37%	28%	22%	37%	37%	33%	29%	38%	25%
					c			f						
Mean score		2.8	2.8	2.9	3.0	2.8	2.9	3.1	2.8	2.7	2.9	2.9	2.8	3.1
								g						
Standard deviation		1.02	1.04	1.00	.92	1.04	.94	.92	1.04	1.04	1.00	.96	1.05	.94
Standard error		.05	.07	.07	.09	.06	.15	.07	.06	.07	.06	.08	.06	.20

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

## LCCI - Topical Q2 2019

**Q3b\_6. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Allowing the UK government to set restrictions on trade with the EU to protect UK business

Base: All respondents excl. don't know

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
		a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	432	253	179	15	54	97	47	63	65	37	54	44	388	
Weighted Total	418	370	49	14	62	87	54	51	100	22	28	43	375	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	(4)	113	96	17	4	22	26	16	10	21	5	9	19	94
		27%	26%	35%	28%	36%	31%	29%	19%	21%	23%	31%	43%	25%
			a			g						l		
Fairly important	(3)	134	117	17	3	16	24	23	13	42	5	9	8	126
		32%	32%	34%	19%	25%	28%	42%	25%	42%	24%	30%	18%	34%
								g				k		
Not very important	(2)	95	83	12	6	14	23	7	15	16	9	6	13	82
		23%	22%	24%	41%	23%	26%	12%	29%	16%	39%	22%	30%	22%
								f			fh			
Not important at all	(1)	77	74	3	2	10	13	9	14	21	3	5	4	73
		18%	20%	6%	12%	16%	15%	17%	27%	21%	14%	17%	8%	19%
			b											
<b>NETS</b>														
Net: Important		247	213	34	7	38	51	38	23	62	10	18	26	220
		59%	58%	69%	47%	62%	58%	71%	44%	62%	47%	62%	61%	59%
				a				gi		g				
Net: Not important		172	157	15	8	24	36	16	29	37	12	11	17	155
		41%	42%	31%	53%	38%	42%	29%	56%	38%	53%	38%	39%	41%
			b					fh		f				
Mean score		2.7	2.6	3.0	2.6	2.8	2.7	2.8	2.4	2.6	2.6	2.8	3.0	2.6
				a		g	g	g			g			
Standard deviation		1.06	1.07	.93	1.06	1.10	1.06	1.04	1.08	1.04	1.02	1.08	1.05	1.06
Standard error		.05	.07	.07	.27	.15	.11	.15	.14	.13	.17	.15	.16	.05

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



## LCCI - Topical Q2 2019

**Q3b\_6. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Allowing the UK government to set restrictions on trade with the EU to protect UK business

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	432	242	190	97	299	36	146	286	199	233	136	275	21
Weighted Total	418	212	206	60	329	29	80	338	156	263	120	276	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 113 27%	60 28%	53 26%	25 42% d	80 24%	8 27%	30 37%	83 25% g	51 32%	63 24% i	36 30%	70 25%	6 27%
Fairly important	(3) 134 32%	60 28%	73 36%	20 34%	101 31%	13 44%	29 37%	104 31%	54 35%	79 30%	46 39%	81 30%	6 27%
Not very important	(2) 95 23%	50 24%	44 22%	8 12%	83 25% c	5 16%	12 15%	83 25% f	25 16%	70 26% h	21 17%	66 24%	8 37%
Not important at all	(1) 77 18%	42 20%	35 17%	7 12%	65 20%	4 13%	9 11%	68 20% f	25 16%	51 20%	16 14%	58 21%	2 9%
<b>NETS</b>													
Net: Important	247 59%	120 57%	127 62%	45 75% d	181 55%	21 70%	59 74% g	187 55%	105 67% i	142 54%	83 69% k	152 55%	12 54%
Net: Not important	172 41%	92 43%	79 38%	15 25%	148 45% c	9 30%	21 26%	151 45% f	51 33%	121 46% h	37 31%	124 45% j	11 46%
Mean score	2.7	2.6	2.7	3.0 d	2.6	2.8	3.0 g	2.6	2.8 i	2.6	2.9 k	2.6	2.7
Standard deviation	1.06	1.09	1.03	1.02 d	1.06	.99	.99 g	1.07	1.06 i	1.06	1.01 k	1.09	.99
Standard error	.05	.07	.08	.10 d	.06	.16	.08 g	.06	.07 i	.07	.09 k	.07	.22

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

## LCCI - Topical Q2 2019

**Q3b\_7. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising restrictions to the free movement of workers between the UK and the EU

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	458	274	184	16	57	100	51	66	69	41	58	47	411
Weighted Total	450	400	50	16	66	90	61	54	107	26	30	47	403
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4)	198	180	18	9	21	45	24	24	47	10	18	182
		44%	45%	35%	57%	31%	50%	39%	45%	44%	38%	58%	45%
Fairly important	(3)	130	111	19	5	26	31	23	11	21	8	6	113
		29%	28%	39%	29%	39%	34%	38%	20%	20%	31%	20%	36%
			a	ghj	gh	ghj	ghj						
Not very important	(2)	65	56	9	2	12	8	6	11	16	5	5	56
		15%	14%	18%	14%	18%	8%	10%	21%	15%	19%	16%	20%
						e							
Not important at all	(1)	57	52	4	*	8	7	8	8	22	3	2	53
		13%	13%	9%	1%	12%	7%	13%	15%	20%	11%	7%	9%
										ej			
<b>NETS</b>													
Net: Important	328	291	37	14	46	76	47	35	69	18	24	33	295
	73%	73%	74%	85%	70%	84%	77%	64%	65%	70%	77%	71%	73%
						dgh							
Net: Not important	122	109	13	2	19	14	14	19	38	8	7	14	109
	27%	27%	26%	15%	30%	16%	23%	36%	35%	30%	23%	29%	27%
					e			e	e				
Mean score	3.0	3.0	3.0	3.4	2.9	3.3	3.0	2.9	2.9	3.0	3.3	3.0	3.1
						dgh					dh		
Standard deviation	1.04	1.06	.95	.77	.99	.90	1.01	1.12	1.19	1.03	.98	.97	1.05
Standard error	.05	.06	.07	.19	.13	.09	.14	.14	.14	.16	.13	.14	.05

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

## LCCI - Topical Q2 2019

**Q3b\_7. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Minimising restrictions to the free movement of workers between the UK and the EU

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	*l
Significance Level: 95%													
Unweighted Total	458	256	202	98	321	39	154	304	210	248	152	285	21
Weighted Total	450	227	224	61	357	33	87	364	169	281	139	289	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 198	115	83	23	160	15	35	163	70	128	71	115	12
	44%	51%	37%	37%	45%	47%	40%	45%	41%	46%	51%	40%	52%
		b									k		
Fairly important	(3) 130	58	72	26	98	6	33	98	52	78	42	82	6
	29%	26%	32%	42%	27%	20%	38%	27%	31%	28%	30%	29%	25%
				de			g						
Not very important	(2) 65	28	37	7	50	8	15	50	24	41	17	45	3
	15%	12%	17%	12%	14%	25%	18%	14%	14%	15%	12%	16%	14%
Not important at all	(1) 57	26	31	5	49	3	4	53	23	34	9	46	2
	13%	12%	14%	8%	14%	8%	5%	14%	14%	12%	7%	16%	9%
							f					j	
<b>NETS</b>													
Net: Important	328	173	155	48	258	22	67	261	122	206	113	198	18
	73%	76%	69%	80%	72%	66%	78%	72%	72%	73%	81%	68%	77%
											k		
Net: Not important	122	54	68	12	99	11	19	103	48	75	26	91	5
	27%	24%	31%	20%	28%	34%	22%	28%	28%	27%	19%	32%	23%
												j	
Mean score	3.0	3.2	2.9	3.1	3.0	3.0	3.1	3.0	3.0	3.1	3.3	2.9	3.2
		b									k		
Standard deviation	1.04	1.03	1.04	.91	1.07	1.04	.87	1.08	1.05	1.04	.91	1.09	1.02
Standard error	.05	.06	.07	.09	.06	.17	.07	.06	.07	.07	.07	.06	.22

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

## LCCI - Topical Q2 2019

**Q3b\_8. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Restricting UK public procurement to UK business, even if this means UK business cannot bid for EU public procurement

Base: All respondents excl. don't know

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
		a	b	*c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	415	242	173	15	55	93	45	55	63	36	53	45	370
Weighted Total	402	355	47	14	64	83	52	42	97	22	27	45	357
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4)	69	57	12	2	9	24	5	5	13	2	8	60
		17%	16%	25%	16%	14%	29%	10%	13%	13%	11%	30%	17%
			a			dfghi					dfghi		
Fairly important	(3)	145	125	19	6	26	26	24	9	37	8	9	122
		36%	35%	42%	43%	40%	31%	47%	22%	38%	35%	34%	52%
						g		g				l	34%
Not very important	(2)	97	86	11	4	19	16	6	15	26	6	6	87
		24%	24%	22%	29%	30%	19%	11%	36%	27%	25%	21%	24%
						f			ef	f			
Not important at all	(1)	91	86	5	2	10	17	17	13	22	6	4	88
		23%	24%	11%	12%	16%	21%	33%	30%	22%	28%	16%	25%
			b				d					k	k
<b>NETS</b>													
Net: Important	214	183	31	8	35	50	29	15	50	10	17	32	182
	53%	51%	67%	59%	54%	60%	56%	34%	51%	46%	63%	71%	51%
			a		g	g	g				g	l	
Net: Not important	188	172	16	6	29	33	23	28	47	12	10	13	175
	47%	49%	33%	41%	46%	40%	44%	66%	49%	54%	37%	29%	49%
			b					defj					k
Mean score	2.5	2.4	2.8	2.6	2.5	2.7	2.3	2.2	2.4	2.3	2.8	2.8	2.4
			a			g					fgi	l	
Standard deviation	1.02	1.03	.95	.93	.93	1.11	1.05	1.01	.98	1.02	1.06	.84	1.04
Standard error	.05	.07	.07	.24	.12	.12	.16	.14	.12	.17	.15	.13	.05

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

## LCCI - Topical Q2 2019

**Q3b\_8. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

**Restricting UK public procurement to UK business, even if this means UK business cannot bid for EU public procurement**

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	415	238	177	95	286	34	143	272	196	219	135	261	19
Weighted Total	402	211	190	60	315	27	77	324	155	246	119	261	21
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 69 17%	29 14%	40 21%	16 26% d	45 14%	9 32% d	20 26% g	49 15%	29 18%	40 16%	25 21%	38 15%	6 29%
Fairly important	(3) 145 36%	75 36%	70 37%	28 47% d	107 34%	10 36%	37 48% g	108 33%	57 37%	87 35%	44 37%	97 37%	4 18%
Not very important	(2) 97 24%	51 24%	45 24%	8 14%	83 26%	5 20% c	11 15%	85 26% f	39 25%	58 23%	31 26%	56 22%	9 43%
Not important at all	(1) 91 23%	56 26%	36 19%	8 14%	80 25% c	3 11%	9 12%	82 25% f	30 20%	61 25%	20 16%	69 27% j	2 11%
<b>NETS</b>													
Net: Important	214 53%	104 49%	109 57%	43 73% d	152 48%	19 69% d	57 74% g	157 48%	86 55%	128 52%	69 58%	135 52%	10 46%
Net: Not important	188 47%	107 51%	81 43%	16 27%	163 52% ce	9 31%	20 26%	167 52% f	69 45%	119 48%	51 42%	126 48%	11 54%
Mean score	2.5	2.4	2.6 a	2.8 d	2.4	2.9 d	2.9 g	2.4	2.5	2.4	2.6 k	2.4	2.6
Standard deviation	1.02	1.02	1.02	.97	1.01	1.00	.93	1.02	1.01	1.04	1.00	1.03	1.03
Standard error	.05	.07	.08	.10	.06	.17	.08	.06	.07	.07	.09	.06	.24

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

## LCCI - Topical Q2 2019

**Q3b\_9. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Limiting the free movement of capital between the UK and the EU

Base: All respondents excl. don't know

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
		a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	433	254	179	16	50	99	47	65	67	37	52	42	391	
Weighted Total	422	374	48	16	57	88	54	53	104	23	27	41	382	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Very important	(4)	123	107	16	2	17	35	19	14	21	4	11	8	114
		29%	29%	33%	14%	30%	40%	34%	26%	20%	16%	41%	20%	30%
						hi					hi			
Fairly important	(3)	103	89	14	4	15	23	12	8	29	9	4	11	92
		25%	24%	30%	24%	26%	26%	22%	16%	27%	40%	16%	28%	24%
										gj				
Not very important	(2)	90	76	14	6	14	18	8	13	20	3	8	15	74
		21%	20%	28%	40%	25%	20%	16%	24%	19%	15%	29%	38%	19%
												l		
Not important at all	(1)	106	102	4	4	11	13	15	18	35	7	4	5	101
		25%	27%	9%	23%	19%	15%	28%	34%	34%	30%	14%	14%	26%
			b					ej	ej	e				
<b>NETS</b>														
Net: Important	226	196	30	6	32	58	31	22	49	13	15	20	207	
	54%	52%	63%	38%	56%	66%	57%	42%	47%	56%	57%	49%	54%	
			a			gh								
Net: Not important	196	178	18	10	25	31	23	31	55	10	12	21	175	
	46%	48%	37%	62%	44%	34%	43%	58%	53%	44%	43%	51%	46%	
			b					e	e					
Mean score	2.6	2.5	2.9	2.3	2.7	2.9	2.6	2.3	2.3	2.4	2.8	2.6	2.6	
			a			ghi					gh			
Standard deviation	1.15	1.17	.98	1.00	1.11	1.09	1.23	1.21	1.14	1.10	1.13	.97	1.17	
Standard error	.06	.07	.07	.25	.16	.11	.18	.15	.14	.18	.16	.15	.06	

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

## LCCI - Topical Q2 2019

**Q3b\_9. How important, if at all, do you believe each of the following would be to any trade agreement the UK makes with the EU once it has left the EU?**

### Limiting the free movement of capital between the UK and the EU

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	433	247	186	95	299	39	148	285	198	235	142	270	21
Weighted Total	422	219	203	58	332	33	82	340	155	267	127	272	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	(4) 123	60	63	19	89	14	24	99	47	76	42	74	7
	29%	27%	31%	33%	27%	44%	29%	29%	30%	29%	33%	27%	31%
						d							
Fairly important	(3) 103	54	50	22	75	7	26	77	39	65	38	58	7
	25%	24%	25%	37%	23%	21%	32%	23%	25%	24%	30%	21%	32%
				d			g				k		
Not very important	(2) 90	46	44	9	76	5	16	74	32	57	19	64	7
	21%	21%	22%	16%	23%	14%	19%	22%	21%	21%	15%	24%	30%
												j	
Not important at all	(1) 106	60	46	8	91	7	17	90	37	69	29	76	2
	25%	27%	23%	14%	28%	21%	20%	26%	24%	26%	22%	28%	7%
					c								
<b>NETS</b>													
Net: Important	226	113	113	41	165	21	50	176	85	141	80	132	14
	54%	52%	56%	70%	50%	65%	61%	52%	55%	53%	63%	48%	63%
				d							k		
Net: Not important	196	106	90	17	167	11	32	164	69	127	47	140	9
	46%	48%	44%	30%	50%	35%	39%	48%	45%	47%	37%	52%	37%
					c							j	
Mean score	2.6	2.5	2.6	2.9	2.5	2.9	2.7	2.5	2.6	2.6	2.7	2.5	2.9
				d		d					k		
Standard deviation	1.15	1.16	1.15	1.03	1.16	1.20	1.10	1.17	1.15	1.16	1.14	1.16	.96
Standard error	.06	.07	.08	.11	.07	.19	.09	.07	.08	.08	.10	.07	.21

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

## LCCI - Topical Q2 2019

**Q4a. The EU customs union is a single trading area without tariffs. The EU operates as a trade bloc, negotiating trade deals as one, with common tariffs and customs for countries outside the EU. As a member of the customs union, the UK is not allowed to negotiate trade deals with other countries independently of the EU. Thinking about the UK's customs and trading relationship with the EU after Brexit, which of the following statements comes closest to your view?**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK should seek to stay in the EU customs union, negotiating all new trade deals through the EU	214	194	19	10	15	40	34	28	51	16	21	13	201
	42%	43%	37%	53%	21%	38%	50%	49%	43%	54%	56%	26%	44%
				d	d	d	d	d	d	d	de	k	k
The UK should leave the EU customs union, allowing it to negotiate all new trade deals independent of the EU	159	146	13	6	29	36	20	8	48	5	7	21	138
	32%	32%	25%	31%	41%	34%	30%	15%	40%	18%	18%	43%	30%
				gij	gij	g	g	gij	gij				
The UK should seek a more limited customs agreement with the EU, and be able to negotiate some new trade deals independent of the EU	104	88	16	2	22	21	13	18	18	5	6	13	91
	21%	19%	30%	11%	32%	20%	19%	31%	15%	15%	15%	26%	20%
			a	hj	hj	hj	hj	hj	hj				
Don't know	27	23	4	1	4	8	*	3	3	4	4	3	24
	5%	5%	8%	5%	6%	7%	*	6%	2%	13%	12%	6%	5%
				f	f	f	f	f	fh	fh	fh	fh	fh

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



## LCCI - Topical Q2 2019

**Q4a. The EU customs union is a single trading area without tariffs. The EU operates as a trade bloc, negotiating trade deals as one, with common tariffs and customs for countries outside the EU. As a member of the customs union, the UK is not allowed to negotiate trade deals with other countries independently of the EU. Thinking about the UK's customs and trading relationship with the EU after Brexit, which of the following statements comes closest to your view?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	*l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK should seek to stay in the EU customs union, negotiating all new trade deals through the EU	214 42%	113 45%	100 40%	22 34%	178 44%	14 44%	30 34%	184 44%	86 44%	127 42%	54 37%	143 43%	16 63%
The UK should leave the EU customs union, allowing it to negotiate all new trade deals independent of the EU	159 32%	63 25%	96 39%	24 38%	120 30%	15 45%	27 30%	132 32%	65 33%	94 31%	45 31%	109 33%	5 19%
The UK should seek a more limited customs agreement with the EU, and be able to negotiate some new trade deals independent of the EU	104 21%	61 24%	43 17%	16 25%	85 21%	3 9%	29 32%	75 18%	29 15%	75 25%	35 24%	64 19%	4 17%
Don't know	27 5%	17 7%	11 4%	2 3%	24 6%	1 2%	4 4%	23 6%	18 9%	9 3%	11 7%	16 5%	* *

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

## LCCI - Topical Q2 2019

**Q4b. The EU customs union is a single trading area without tariffs. The EU operates as a trade bloc, negotiating trade deals as one, with common tariffs and customs for countries outside the EU. As a member of the customs union, the UK is not allowed to negotiate trade deals with other countries independently of the EU. Thinking about the UK's customs and trading relationship with the EU after Brexit, which of the following statements comes closest to your view?**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	471	293	178	16	57	105	53	65	73	40	62	46	425
Weighted Total	476	428	48	17	66	96	67	54	117	26	33	46	430
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK should seek to stay in the EU customs union, negotiating all new trade deals through the EU	214 45%	194 45%	19 40%	10 56%	15 22%	40 41%	34 51%	28 52%	51 44%	16 62%	21 63%	13 27%	201 47%
						d	d	d	d	de	deh		k
The UK should leave the EU customs union, allowing it to negotiate all new trade deals independent of the EU	159 33%	146 34%	13 27%	6 33%	29 44%	36 37%	20 30%	8 16%	48 41%	5 20%	7 20%	21 46%	138 32%
					gij	gi			gij				
The UK should seek a more limited customs agreement with the EU, and be able to negotiate some new trade deals independent of the EU	104 22%	88 21%	16 33%	2 11%	22 34%	21 22%	13 19%	18 33%	18 15%	5 18%	6 17%	13 27%	91 21%
			a		hj			hj					

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

## LCCI - Topical Q2 2019

**Q4b. The EU customs union is a single trading area without tariffs. The EU operates as a trade bloc, negotiating trade deals as one, with common tariffs and customs for countries outside the EU. As a member of the customs union, the UK is not allowed to negotiate trade deals with other countries independently of the EU. Thinking about the UK's customs and trading relationship with the EU after Brexit, which of the following statements comes closest to your view?**

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	471	263	208	97	337	37	150	321	215	256	148	302	21
Weighted Total	476	237	239	61	382	32	85	390	180	296	135	316	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
The UK should seek to stay in the EU customs union, negotiating all new trade deals through the EU	214 45%	113 48%	100 42%	22 36%	178 46%	14 45%	30 35%	184 47% f	86 48%	127 43%	54 40%	143 45%	16 63%
The UK should leave the EU customs union, allowing it to negotiate all new trade deals independent of the EU	159 33%	63 26%	96 40% a	24 39%	120 31%	15 46%	27 31%	132 34%	65 36%	94 32%	45 33%	109 34%	5 19%
The UK should seek a more limited customs agreement with the EU, and be able to negotiate some new trade deals independent of the EU	104 22%	61 26% b	43 18%	16 25% e	85 22%	3 10%	29 34% g	75 19%	29 16%	75 25% h	35 26%	64 20%	4 17%

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

## LCCI - Topical Q2 2019

**Q5a. Article 50 of the Lisbon Treaty sets out how an EU country voluntarily leaves the EU, and was invoked by the UK in March 2017. Revoking Article 50 would essentially mean 'cancelling' Brexit and the UK remaining in the EU. A no-deal Brexit, on the other hand, would involve the UK leaving the EU on a set date, with no agreements in place about a future relationship. Thinking on behalf of your business, if the UK faced a choice between revoking Article 50 and leaving the European Union without a deal, which would you prefer?**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%	a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Revoke Article 50	276	249	26	11	31	53	39	35	61	18	27	20	256
	55%	55%	50%	63%	44%	51%	58%	60%	51%	60%	72%	40%	56%
										deh		k	
Leave without a deal	188	166	22	6	35	41	22	19	49	9	7	27	161
	37%	37%	41%	34%	49%	39%	33%	33%	41%	32%	18%	55%	35%
					j	j		j	j			l	
Don't know	40	35	5	*	4	10	6	4	9	2	4	2	37
	8%	8%	9%	2%	6%	9%	9%	7%	8%	8%	10%	5%	8%

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

## LCCI - Topical Q2 2019

**Q5a. Article 50 of the Lisbon Treaty sets out how an EU country voluntarily leaves the EU, and was invoked by the UK in March 2017. Revoking Article 50 would essentially mean 'cancelling' Brexit and the UK remaining in the EU. A no-deal Brexit, on the other hand, would involve the UK leaving the EU on a set date, with no agreements in place about a future relationship. Thinking on behalf of your business, if the UK faced a choice between revoking Article 50 and leaving the European Union without a deal, which would you prefer?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Revoke Article 50	276	151	124	31	228	17	46	230	106	170	79	175	22
	55%	60%	50%	48%	56%	52%	51%	56%	53%	56%	54%	53%	86%
		b											
Leave without a deal	188	82	106	29	146	13	38	150	79	109	58	127	3
	37%	32%	42%	46%	36%	40%	43%	36%	40%	36%	40%	38%	13%
		a											
Don't know	40	20	20	3	33	3	5	34	13	26	9	30	*
	8%	8%	8%	5%	8%	9%	6%	8%	7%	9%	6%	9%	*

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

## LCCI - Topical Q2 2019

**Q5b. Article 50 of the Lisbon Treaty sets out how an EU country voluntarily leaves the EU, and was invoked by the UK in March 2017. Revoking Article 50 would essentially mean 'cancelling' Brexit and the UK remaining in the EU. A no-deal Brexit, on the other hand, would involve the UK leaving the EU on a set date, with no agreements in place about a future relationship. Thinking on behalf of your business, if the UK faced a choice between revoking Article 50 and leaving the European Union without a deal, which would you prefer?**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	459	288	171	17	55	100	48	63	70	42	64	46	413
Weighted Total	463	416	48	18	65	94	61	54	110	27	34	47	417
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Revoke Article 50	276	249	26	11	31	53	39	35	61	18	27	20	256
	59%	60%	55%	65%	47%	57%	64%	65%	56%	66%	80%	42%	61%
										deh		k	
Leave without a deal	188	166	22	6	35	41	22	19	49	9	7	27	161
	41%	40%	45%	35%	53%	43%	36%	35%	44%	34%	20%	58%	39%
					j	j			j			l	

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

## LCCI - Topical Q2 2019

**Q5b. Article 50 of the Lisbon Treaty sets out how an EU country voluntarily leaves the EU, and was invoked by the UK in March 2017. Revoking Article 50 would essentially mean 'cancelling' Brexit and the UK remaining in the EU. A no-deal Brexit, on the other hand, would involve the UK leaving the EU on a set date, with no agreements in place about a future relationship. Thinking on behalf of your business, if the UK faced a choice between revoking Article 50 and leaving the European Union without a deal, which would you prefer?**

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	459	257	202	94	332	33	146	313	214	245	147	291	21
Weighted Total	463	233	230	60	374	30	84	379	185	278	137	302	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Revoke Article 50	276	151	124	31	228	17	46	230	106	170	79	175	22
	59%	65%	54%	51%	61%	56%	54%	61%	57%	61%	58%	58%	87%
		b											
Leave without a deal	188	82	106	29	146	13	38	150	79	109	58	127	3
	41%	35%	46%	49%	39%	44%	46%	39%	43%	39%	42%	42%	13%
		a											

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

## LCCI - Topical Q2 2019

**Q6a\_SUM. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### SUMMARY TABLE

Base: All respondents

	Total	NETS									
		At least once a day	Less than once a day but at least once a week	Less than once a week but at least once a month	Less than once a month but at least once every six months	Less than once every six months, but in the last 12 months	Never in the last twelve months	Don't know	At least once every six months	At least once a month	At least once a week
A member of staff being late to work due to delays, cancellations or overcrowding on trains into London	503 100%	23 5%	37 7%	65 13%	48 9%	45 9%	251 50%	35 7%	172 34%	125 25%	60 12%
A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London	503 100%	12 2%	26 5%	36 7%	67 13%	30 6%	297 59%	35 7%	141 28%	74 15%	38 8%
Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London	503 100%	8 2%	26 5%	28 5%	39 8%	29 6%	341 68%	33 7%	100 20%	62 12%	34 7%
Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London	503 100%	5 1%	20 4%	42 8%	68 14%	52 10%	278 55%	38 8%	135 27%	67 13%	25 5%



## LCCI - Topical Q2 2019

**Q6a\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being late to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	23	19	4	4	2	11	4	1	1	*	1	6	17
	5%	4%	8%	20%	3%	10%	6%	1%	1%	1%	2%	12%	4%
						ghj						l	
Less than once a day but at least once a week	37	26	11	-	4	8	4	3	13	2	3	4	32
	7%	6%	20%	-	6%	7%	6%	5%	11%	6%	9%	9%	7%
			a										
Less than once a week but at least once a month	65	50	15	1	9	16	14	6	14	3	2	8	57
	13%	11%	28%	6%	14%	15%	21%	10%	12%	9%	7%	16%	13%
			a				j						
Less than once a month but at least once every six months	48	42	6	2	10	8	5	9	10	2	2	5	43
	9%	9%	11%	12%	14%	7%	8%	15%	8%	7%	5%	9%	9%
								j					
Less than once every six months, but in the last 12 months	45	41	4	4	10	10	2	5	4	3	6	7	38
	9%	9%	8%	20%	14%	10%	4%	9%	4%	11%	16%	15%	8%
					h						fh		
Never in the last twelve months	251	243	8	7	32	45	33	27	70	18	19	17	234
	50%	54%	14%	40%	45%	43%	49%	46%	59%	61%	51%	35%	51%
		b						e	e	e		k	
Don't know	35	30	5	*	2	8	4	8	7	2	4	2	33
	7%	7%	9%	2%	3%	7%	5%	13%	6%	6%	10%	4%	7%
								d					

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

## LCCI - Topical Q2 2019

**Q6a\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being late to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: At least once every six months	172	136	36	7	26	42	28	18	37	7	8	23	150
	34%	30%	69%	38%	37%	40%	42%	31%	31%	22%	22%	46%	33%
		a	a			ij	ij						
Net: At least once a month	125	95	30	5	16	34	22	9	27	5	7	18	107
	25%	21%	57%	26%	23%	32%	33%	16%	23%	16%	17%	37%	23%
		a	a			gij	gij					l	
Net: At least once a week	60	45	15	4	7	18	8	3	13	2	4	10	49
	12%	10%	29%	20%	10%	17%	12%	6%	11%	7%	11%	21%	11%
		a	a			g						l	

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

## LCCI - Topical Q2 2019

**Q6a\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### A member of staff being late to work due to delays, cancellations or overcrowding on trains into London

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	23 5%	11 4%	12 5%	11 18% de	11 3%	* 1%	16 18% g	7 2%	19 10% i	4 1%	10 7%	13 4%	- -
Less than once a day but at least once a week	37 7%	19 7%	18 7%	12 19% d	18 4%	7 22% d	20 23% g	16 4%	14 7%	23 8%	21 14% k	13 4%	3 12%
Less than once a week but at least once a month	65 13%	36 14%	29 12%	13 21% d	48 12%	4 12%	22 25% g	43 10%	32 16%	33 11%	25 17%	37 11%	3 11%
Less than once a month but at least once every six months	48 9%	26 10%	22 9%	3 5%	44 11%	* 1%	7 7%	41 10%	15 8%	32 11%	15 10%	31 9%	2 7%
Less than once every six months, but in the last 12 months	45 9%	27 11%	18 7%	8 13%	32 8%	4 13%	10 11%	35 8%	23 11%	22 7%	20 14% k	23 7%	2 8%
Never in the last twelve months	251 50%	119 47%	132 53%	14 21%	223 55% c	14 43% c	13 14%	238 58% f	80 40%	171 56% h	51 35%	185 56% j	16 62%
Don't know	35 7%	16 6%	18 7%	2 3%	30 7%	3 8%	1 1%	34 8% f	15 8%	19 6%	5 3%	30 9% j	- -
<b>NETS</b>													
Net: At least once every six months	172 34%	91 36%	81 32%	39 62% de	121 30%	12 36%	66 73% g	107 26%	80 41% i	92 30%	71 48% k	94 28%	7 30%

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

## LCCI - Topical Q2 2019

**Q6a\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being late to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	125	65	59	36	77	12	59	66	65	60	56	63	6
	25%	26%	24%	58%	19%	35%	66%	16%	33%	20%	38%	19%	22%
				de		d	g		i		k		
Net: At least once a week	60	30	30	23	29	7	37	23	33	27	31	26	3
	12%	12%	12%	36%	7%	23%	41%	6%	17%	9%	21%	8%	12%
				d		d	g		i		k		

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

## LCCI - Topical Q2 2019

**Q6a\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	12	9	3	2	2	3	4	1	1	-	-	4	9
	2%	2%	7%	10%	3%	3%	6%	1%	1%	-	-	8%	2%
		a				j						l	
Less than once a day but at least once a week	26	16	9	2	1	11	4	2	3	*	2	3	22
	5%	4%	17%	12%	1%	11%	7%	3%	3%	1%	5%	6%	5%
		a				dhi							
Less than once a week but at least once a month	36	24	13	1	3	7	6	7	11	1	1	2	34
	7%	5%	24%	4%	4%	7%	9%	13%	9%	2%	3%	4%	8%
		a						ij					
Less than once a month but at least once every six months	67	60	6	4	19	12	6	6	14	2	4	13	54
	13%	13%	12%	20%	27%	12%	10%	10%	12%	7%	10%	27%	12%
					efghij							l	
Less than once every six months, but in the last 12 months	30	26	5	2	4	5	4	2	7	2	3	2	28
	6%	6%	9%	10%	6%	5%	6%	4%	6%	8%	8%	4%	6%
Never in the last twelve months	297	287	11	6	39	60	39	31	75	23	25	22	275
	59%	64%	20%	33%	56%	57%	58%	55%	63%	78%	65%	45%	61%
		b							defg			k	
Don't know	35	29	5	2	2	6	4	8	7	1	4	3	31
	7%	7%	10%	12%	3%	6%	5%	14%	6%	4%	10%	7%	7%
						d							

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

## LCCI - Topical Q2 2019

**Q6a\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: At least once every six months	141	109	32	8	25	33	21	16	29	3	6	22	119
	28%	24%	60%	45%	35%	32%	31%	27%	25%	10%	17%	45%	26%
		a	a		ij	ij	i	i	i			l	
Net: At least once a month	74	49	25	5	6	21	15	10	15	1	3	9	65
	15%	11%	48%	26%	8%	20%	22%	17%	13%	3%	7%	18%	14%
		a	a			dij	dij	i					
Net: At least once a week	38	25	12	4	3	14	8	3	4	*	2	7	31
	8%	6%	24%	21%	4%	13%	13%	4%	3%	1%	5%	14%	7%
		a	a			hi	hi						

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

## LCCI - Topical Q2 2019

**Q6a\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	12 2%	7 3%	5 2%	11 17% de	1 *	* *	11 12% g	1 *	10 5% i	2 1%	10 7% k	3 1%	- -
Less than once a day but at least once a week	26 5%	12 5%	14 5%	12 19% d	10 3%	3 9% d	18 20% g	8 2%	18 9% i	8 3%	15 10% k	8 2%	2 9%
Less than once a week but at least once a month	36 7%	22 9%	14 6%	8 13% d	26 6%	2 6%	14 16% g	22 5%	19 10%	17 6%	14 10%	20 6%	1 6%
Less than once a month but at least once every six months	67 13%	35 14%	32 13%	6 9%	56 14%	5 16%	13 14%	54 13%	20 10%	46 15%	19 13%	44 13%	4 15%
Less than once every six months, but in the last 12 months	30 6%	20 8%	11 4%	3 4%	23 6%	4 13%	12 13% g	19 5%	10 5%	20 7%	10 7%	20 6%	- -
Never in the last twelve months	297 59%	141 56%	156 62%	20 32%	259 64% c	18 54% c	19 22%	278 67% f	104 52%	193 63% h	74 51%	205 62% j	18 71%
Don't know	35 7%	16 6%	18 7%	3 5%	31 8%	* 1%	3 3%	32 8%	17 8%	18 6%	3 2%	31 9% j	- -
<b>NETS</b>													
Net: At least once every six months	141 28%	76 30%	65 26%	37 58% de	93 23%	11 32%	56 62% g	85 21%	68 34% i	73 24%	58 40% k	76 23%	7 29%

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

## LCCI - Topical Q2 2019

**Q6a\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	74 15%	41 16%	33 13%	31 49% de	38 9%	5 16%	43 48% g	31 8%	47 24% i	27 9%	39 27% k	31 9%	4 14%
Net: At least once a week	38 8%	19 7%	19 8%	23 36% de	12 3%	3 10%	29 32% g	9 2%	28 14% i	10 3%	25 17% k	11 3%	2 9%

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



## LCCI - Topical Q2 2019

**Q6a\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	8	4	4	-	1	3	3	*	*	1	-	1	7
	2%	1%	7%	-	2%	3%	4%	*	*	3%	-	2%	2%
			a										
Less than once a day but at least once a week	26	20	6	4	2	6	3	2	5	2	2	6	20
	5%	4%	11%	21%	3%	6%	5%	3%	4%	5%	5%	13%	4%
			a									l	
Less than once a week but at least once a month	28	18	9	1	7	6	3	5	2	3	1	7	21
	5%	4%	18%	4%	10%	5%	5%	9%	2%	9%	4%	14%	5%
			a		h							l	
Less than once a month but at least once every six months	39	30	9	2	8	11	3	6	8	*	1	8	31
	8%	7%	17%	10%	11%	11%	4%	10%	7%	1%	2%	16%	7%
			a		ij	ij		ij				l	
Less than once every six months, but in the last 12 months	29	26	3	4	3	5	-	6	7	*	4	4	25
	6%	6%	7%	20%	4%	5%	-	11%	6%	1%	10%	8%	6%
								fi		fi	fi		
Never in the last twelve months	341	324	17	8	47	65	51	31	90	23	26	22	319
	68%	72%	33%	43%	67%	63%	76%	54%	75%	78%	69%	45%	70%
		b					g		g	g		k	
Don't know	33	29	4	*	2	8	4	8	7	1	4	1	32
	7%	6%	8%	2%	2%	8%	5%	14%	6%	3%	10%	3%	7%
								d					

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

## LCCI - Topical Q2 2019

**Q6a\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: At least once every six months	100	73	28	6	19	25	12	12	16	5	4	22	78
	20%	16%	53%	35%	27%	24%	18%	21%	13%	18%	11%	45%	17%
		a	a		hj	j						l	
Net: At least once a month	62	43	19	5	11	14	9	7	8	5	3	14	48
	12%	9%	36%	25%	15%	14%	14%	12%	6%	17%	9%	28%	10%
		a	a									l	
Net: At least once a week	34	24	10	4	4	9	6	2	5	2	2	7	27
	7%	5%	19%	21%	5%	8%	9%	3%	5%	8%	5%	15%	6%
		a	a									l	

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

## LCCI - Topical Q2 2019

**Q6a\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	8 2%	8 3%	* *	5 8%	3 1%	* *	6 7%	2 *	5 2%	3 1%	5 4%	3 1%	- -
		b	d	d			g			k			
Less than once a day but at least once a week	26 5%	10 4%	16 6%	16 25%	10 3%	* 1%	20 22%	6 1%	19 9%	7 2%	12 8%	14 4%	1 2%
			de	de			g	i					
Less than once a week but at least once a month	28 5%	14 6%	13 5%	6 9%	20 5%	2 6%	11 12%	17 4%	16 8%	12 4%	11 7%	15 5%	1 6%
							g	i					
Less than once a month but at least once every six months	39 8%	21 8%	17 7%	9 14%	26 6%	4 12%	13 15%	26 6%	16 8%	22 7%	11 7%	23 7%	5 21%
				d			g						
Less than once every six months, but in the last 12 months	29 6%	19 8%	10 4%	3 4%	25 6%	2 5%	8 9%	21 5%	8 4%	21 7%	7 5%	20 6%	2 7%
Never in the last twelve months	341 68%	164 65%	177 71%	23 36%	293 72%	25 75%	30 34%	310 75%	120 61%	221 72%	95 65%	229 69%	16 63%
				c	c	c	f	h					
Don't know	33 7%	17 7%	16 6%	2 3%	31 8%	* 1%	2 2%	32 8%	15 8%	18 6%	5 3%	28 9%	* 1%
							f					j	
<b>NETS</b>													
Net: At least once every six months	100 20%	53 21%	47 19%	35 56%	58 14%	6 19%	50 56%	50 12%	55 28%	45 15%	39 27%	54 16%	7 29%
				de			g	i			k		

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

## LCCI - Topical Q2 2019

**Q6a\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	62 12%	32 13%	30 12%	26 42% de	33 8%	2 7%	37 41% g	25 6%	39 20% i	23 7%	28 19% k	31 9%	2 8%
Net: At least once a week	34 7%	17 7%	17 7%	21 33% de	13 3%	* 1%	26 29% g	8 2%	23 12% i	11 4%	17 12% k	16 5%	1 2%

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

## LCCI - Topical Q2 2019

**Q6a\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	5	4	1	-	-	2	2	*	*	*	1	-	5
	1%	1%	2%	-	-	2%	3%	*	*	*	2%	-	1%
Less than once a day but at least once a week	20	12	8	4	2	5	1	3	4	1	1	6	14
	4%	3%	16%	25%	2%	5%	1%	4%	3%	4%	2%	11%	3%
			a									l	
Less than once a week but at least once a month	42	29	13	*	5	11	6	4	11	1	3	5	37
	8%	6%	25%	1%	8%	11%	10%	8%	9%	2%	9%	10%	8%
			a										
Less than once a month but at least once every six months	68	62	6	4	10	15	12	8	15	2	3	8	61
	14%	14%	12%	20%	14%	15%	18%	14%	13%	8%	7%	16%	13%
Less than once every six months, but in the last 12 months	52	46	6	4	12	4	8	9	8	3	5	11	41
	10%	10%	11%	20%	18%	4%	12%	15%	7%	10%	12%	23%	9%
				eh			e	e			e	l	
Never in the last twelve months	278	264	13	6	38	59	33	26	73	20	23	16	261
	55%	59%	25%	33%	54%	56%	50%	45%	61%	66%	62%	33%	58%
		b							g			k	
Don't know	38	34	4	*	3	8	4	8	9	3	3	3	35
	8%	7%	9%	2%	5%	7%	6%	14%	8%	11%	7%	7%	8%

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

## LCCI - Topical Q2 2019

**Q6a\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>NETS</b>													
Net: At least once every six months	135	107	29	8	17	34	21	15	29	4	7	18	117
	27%	24%	55%	45%	24%	33%	32%	26%	25%	13%	19%	37%	26%
		a				ij	i						
Net: At least once a month	67	45	23	5	7	19	9	7	14	2	5	11	57
	13%	10%	43%	26%	10%	18%	14%	13%	12%	6%	12%	22%	12%
		a				i							
Net: At least once a week	25	16	9	4	2	7	3	3	4	1	1	6	19
	5%	3%	18%	25%	2%	7%	4%	5%	3%	4%	3%	11%	4%
		a										l	

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

## LCCI - Topical Q2 2019

**Q6a\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	5 1%	2 1%	3 1%	5 8% d	* *	* *	4 5% g	1 *	4 2% i	1 *	2 1%	3 1%	- -
Less than once a day but at least once a week	20 4%	12 5%	8 3%	11 18% de	8 2%	1 2%	13 15% g	7 2%	14 7% i	6 2%	10 7% k	9 3%	2 6%
Less than once a week but at least once a month	42 8%	22 9%	20 8%	11 17% d	27 7%	5 14%	18 20% g	24 6%	22 11%	20 7%	21 14% k	20 6%	2 8%
Less than once a month but at least once every six months	68 14%	45 18% b	24 9%	10 16%	56 14%	2 6%	16 17%	53 13%	25 13%	43 14%	26 18% k	37 11%	6 22%
Less than once every six months, but in the last 12 months	52 10%	23 9%	29 12%	6 10%	39 9%	7 22% d	10 11%	42 10%	21 11%	30 10%	17 12%	31 9%	4 14%
Never in the last twelve months	278 55%	137 54%	140 56%	18 29%	246 60% ce	14 42%	26 29%	251 61% f	97 49%	181 59% h	65 44%	203 61% j	10 41%
Don't know	38 8%	12 5% a	26 10% a	2 4%	31 8%	5 14% c	2 2%	36 9% f	14 7%	24 8%	6 4%	30 9% j	2 8%
<b>NETS</b>													
Net: At least once every six months	135 27%	81 32% b	54 22%	37 58% de	91 22%	7 22%	51 57% g	84 20%	66 33% i	70 23%	58 40% k	68 20%	9 37%

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

## LCCI - Topical Q2 2019

**Q6a\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	67 13%	36 14%	31 12%	27 42% de	35 9%	5 16%	36 40% g	31 8%	41 20% i	27 9%	33 22% k	31 9%	4 14%
Net: At least once a week	25 5%	14 6%	11 4%	16 25% de	8 2%	1 2%	18 20% g	7 2%	18 9% i	7 2%	12 8% k	11 3%	2 6%

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



## LCCI - Topical Q2 2019

**Q6b\_SUM. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### SUMMARY TABLE

Base: All respondents excl. don't know

	Total	NETS								
		At least once a day	Less than once a day but at least once a week	Less than once a week but at least once a month	Less than once a month but at least once every six months	Less than once every six months, but in the last 12 months	Never in the last twelve months	At least once every six months	At least once a month	At least once a week
Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London	470 100%	8 2%	26 6%	28 6%	39 8%	29 6%	341 73%	100 21%	62 13%	34 7%
A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London	468 100%	12 3%	26 5%	36 8%	67 14%	30 6%	297 63%	141 30%	74 16%	38 8%
A member of staff being late to work due to delays, cancellations or overcrowding on trains into London	468 100%	23 5%	37 8%	65 14%	48 10%	45 10%	251 54%	172 37%	125 27%	60 13%
Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London	465 100%	5 1%	20 4%	42 9%	68 15%	52 11%	278 60%	135 29%	67 14%	25 5%

## LCCI - Topical Q2 2019

**Q6b\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being late to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	469	290	179	17	55	104	52	62	70	45	64	45	424
Weighted Total	468	421	48	18	68	96	63	50	112	28	34	47	421
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	23	19	4	4	2	11	4	1	1	*	1	6	17
	5%	4%	9%	21%	3%	11%	6%	1%	1%	1%	2%	12%	4%
		a			ghij							l	
Less than once a day but at least once a week	37	26	11	-	4	8	4	3	13	2	3	4	32
	8%	6%	22%	-	7%	8%	6%	6%	11%	6%	10%	9%	8%
		a											
Less than once a week but at least once a month	65	50	15	1	9	16	14	6	14	3	2	8	57
	14%	12%	31%	6%	14%	16%	23%	11%	12%	9%	7%	17%	14%
		a					j						
Less than once a month but at least once every six months	48	42	6	2	10	8	5	9	10	2	2	5	43
	10%	10%	13%	13%	15%	8%	9%	18%	9%	7%	5%	10%	10%
								j					
Less than once every six months, but in the last 12 months	45	41	4	4	10	10	2	5	4	3	6	7	38
	10%	10%	9%	20%	14%	11%	4%	11%	4%	12%	18%	15%	9%
					h						fh		
Never in the last twelve months	251	243	8	7	32	45	33	27	70	18	19	17	234
	54%	58%	16%	41%	47%	46%	52%	54%	63%	64%	57%	37%	55%
		b							e	e		k	
<b>NETS</b>													
Net: At least once every six months	172	136	36	7	26	42	28	18	37	7	8	23	150
	37%	32%	75%	39%	39%	43%	44%	36%	33%	24%	25%	48%	36%
			a			ij	ij						

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

## LCCI - Topical Q2 2019

**Q6b\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being late to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	469	290	179	17	55	104	52	62	70	45	64	45	424
Weighted Total	468	421	48	18	68	96	63	50	112	28	34	47	421
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	125	95	30	5	16	34	22	9	27	5	7	18	107
	27%	23%	63%	26%	24%	35%	35%	18%	24%	17%	19%	38%	25%
		a				gij	gi						
Net: At least once a week	60	45	15	4	7	18	8	3	13	2	4	10	49
	13%	11%	32%	21%	10%	19%	13%	7%	12%	7%	12%	22%	12%
		a				g							

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

## LCCI - Topical Q2 2019

**Q6b\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### A member of staff being late to work due to delays, cancellations or overcrowding on trains into London

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	469	262	207	97	335	37	155	314	221	248	154	293	22
Weighted Total	468	237	231	61	377	30	88	380	183	285	141	302	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	23 5%	11 5%	12 5%	11 19% de	11 3%	* 1%	16 19% g	7 2%	19 11% i	4 1%	10 7%	13 4%	- -
Less than once a day but at least once a week	37 8%	19 8%	18 8%	12 19% d	18 5%	7 23% d	20 23% g	16 4%	14 7%	23 8%	21 15% k	13 4%	3 12%
Less than once a week but at least once a month	65 14%	36 15%	29 13%	13 22% d	48 13%	4 13%	22 25% g	43 11%	32 18%	33 12%	25 18%	37 12%	3 11%
Less than once a month but at least once every six months	48 10%	26 11%	22 10%	3 5%	44 12%	* 1%	7 8%	41 11%	15 8%	32 11%	15 11%	31 10%	2 7%
Less than once every six months, but in the last 12 months	45 10%	27 11%	18 8%	8 13%	32 9%	4 14%	10 11%	35 9%	23 12%	22 8%	20 14% k	23 8%	2 8%
Never in the last twelve months	251 54%	119 50%	132 57%	14 22% c	223 59% c	14 46% c	13 14% f	238 63% j	80 44% h	171 60% h	51 36%	185 61% j	16 62%
<b>NETS</b>													
Net: At least once every six months	172 37%	91 38%	81 35%	39 64% de	121 32%	12 39%	66 74% g	107 28%	80 44% i	92 32%	71 50% k	94 31%	7 30%
Net: At least once a month	125 27%	65 28%	59 26%	36 60% de	77 20%	12 38% d	59 67% g	66 17%	65 35% i	60 21%	56 39% k	63 21%	6 22%

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

## LCCI - Topical Q2 2019

**Q6b\_1. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being late to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	469	262	207	97	335	37	155	314	221	248	154	293	22
Weighted Total	468	237	231	61	377	30	88	380	183	285	141	302	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a week	60	30	30	23	29	7	37	23	33	27	31	26	3
	13%	12%	13%	38%	8%	25%	42%	6%	18%	9%	22%	9%	12%
				d		d	g		i		k		

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

## LCCI - Topical Q2 2019

**Q6b\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	468	291	177	16	56	105	52	60	70	45	64	45	423
Weighted Total	468	421	47	16	68	98	63	49	112	28	34	46	423
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	12	9	3	2	2	3	4	1	1	-	-	4	9
	3%	2%	7%	11%	3%	3%	6%	2%	1%	-	-	8%	2%
		a				j						l	
Less than once a day but at least once a week	26	16	9	2	1	11	4	2	3	*	2	3	22
	5%	4%	19%	13%	1%	11%	7%	3%	3%	1%	5%	7%	5%
		a				dhi							
Less than once a week but at least once a month	36	24	13	1	3	7	6	7	11	1	1	2	34
	8%	6%	27%	5%	4%	7%	10%	15%	10%	2%	3%	4%	8%
		a						dij					
Less than once a month but at least once every six months	67	60	6	4	19	12	6	6	14	2	4	13	54
	14%	14%	14%	22%	28%	12%	10%	12%	13%	7%	11%	29%	13%
					efghij							l	
Less than once every six months, but in the last 12 months	30	26	5	2	4	5	4	2	7	2	3	2	28
	6%	6%	10%	11%	6%	6%	6%	5%	7%	8%	8%	4%	7%
Never in the last twelve months	297	287	11	6	39	60	39	31	75	23	25	22	275
	63%	68%	23%	37%	57%	61%	61%	64%	67%	81%	73%	48%	65%
		b							def			k	
<b>NETS</b>													
Net: At least once every six months	141	109	32	8	25	33	21	16	29	3	6	22	119
	30%	26%	67%	51%	36%	34%	33%	32%	26%	11%	19%	48%	28%
		a			ij	ij	i	i	i			l	

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

## LCCI - Topical Q2 2019

**Q6b\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	468	291	177	16	56	105	52	60	70	45	64	45	423
Weighted Total	468	421	47	16	68	98	63	49	112	28	34	46	423
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	74	49	25	5	6	21	15	10	15	1	3	9	65
	16%	12%	54%	29%	8%	21%	23%	20%	14%	3%	8%	19%	15%
		a				dij	dij	i					
Net: At least once a week	38	25	12	4	3	14	8	3	4	*	2	7	31
	8%	6%	27%	24%	4%	14%	13%	5%	4%	1%	5%	15%	7%
		a				hi	hi						

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

## LCCI - Topical Q2 2019

**Q6b\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	468	262	206	94	335	39	151	317	221	247	154	292	22
Weighted Total	468	237	231	60	376	33	87	382	182	287	142	301	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	12 3%	7 3%	5 2%	11 18% de	1 *	* *	11 13% g	1 *	10 6% i	2 1%	10 7% k	3 1%	- -
Less than once a day but at least once a week	26 5%	12 5%	14 6%	12 20% d	10 3%	3 9% d	18 21% g	8 2%	18 10% i	8 3%	15 11% k	8 3%	2 9%
Less than once a week but at least once a month	36 8%	22 9%	14 6%	8 14% d	26 7%	2 6%	14 16% g	22 6%	19 10% g	17 6%	14 10% g	20 7%	1 6%
Less than once a month but at least once every six months	67 14%	35 15%	32 14%	6 9%	56 15%	5 16%	13 15% g	54 14%	20 11% g	46 16%	19 13% g	44 15%	4 15%
Less than once every six months, but in the last 12 months	30 6%	20 8%	11 5%	3 5% g	23 6%	4 13% g	12 13% g	19 5%	10 6% g	20 7%	10 7% g	20 7% g	- -
Never in the last twelve months	297 63%	141 60%	156 67%	20 34% c	259 69% c	18 55% c	19 22% f	278 73% f	104 57% h	193 68% h	74 52% j	205 68% j	18 71%
<b>NETS</b>													
Net: At least once every six months	141 30%	76 32%	65 28%	37 62% de	93 25%	11 33%	56 64% g	85 22%	68 37% i	73 26%	58 41% k	76 25%	7 29%
Net: At least once a month	74 16%	41 17%	33 14%	31 52% de	38 10%	5 16%	43 49% g	31 8%	47 26% i	27 9%	39 27% k	31 10%	4 14%

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



## LCCI - Topical Q2 2019

**Q6b\_2. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	468	262	206	94	335	39	151	317	221	247	154	292	22
Weighted Total	468	237	231	60	376	33	87	382	182	287	142	301	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a week	38	19	19	23	12	3	29	9	28	10	25	11	2
	8%	8%	8%	38%	3%	10%	33%	2%	16%	3%	17%	4%	9%
			de		d		g		i		k		

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

## LCCI - Topical Q2 2019

**Q6b\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	470	291	179	17	56	103	52	61	71	46	64	46	424
Weighted Total	470	422	48	18	68	96	63	49	112	29	34	48	422
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	8	4	4	-	1	3	3	*	*	1	-	1	7
	2%	1%	8%	-	2%	3%	4%	*	*	3%	-	2%	2%
			a										
Less than once a day but at least once a week	26	20	6	4	2	6	3	2	5	2	2	6	20
	6%	5%	12%	22%	4%	6%	5%	3%	5%	5%	6%	13%	5%
			a									l	
Less than once a week but at least once a month	28	18	9	1	7	6	3	5	2	3	1	7	21
	6%	4%	19%	4%	10%	6%	5%	10%	2%	9%	4%	14%	5%
			a					h				l	
Less than once a month but at least once every six months	39	30	9	2	8	11	3	6	8	*	1	8	31
	8%	7%	18%	11%	12%	12%	5%	11%	7%	1%	2%	17%	7%
			a		ij	ij		ij				l	
Less than once every six months, but in the last 12 months	29	26	3	4	3	5	-	6	7	*	4	4	25
	6%	6%	7%	20%	4%	5%	-	13%	6%	1%	12%	8%	6%
								fi		fi			
Never in the last twelve months	341	324	17	8	47	65	51	31	90	23	26	22	319
	73%	77%	36%	44%	69%	68%	81%	63%	80%	81%	76%	46%	76%
		b					g		g	g		k	
<b>NETS</b>													
Net: At least once every six months	100	73	28	6	19	25	12	12	16	5	4	22	78
	21%	17%	57%	36%	27%	27%	19%	25%	14%	18%	12%	46%	19%
			a		j	hj						l	

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

## LCCI - Topical Q2 2019

**Q6b\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	470	291	179	17	56	103	52	61	71	46	64	46	424
Weighted Total	470	422	48	18	68	96	63	49	112	29	34	48	422
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	62	43	19	5	11	14	9	7	8	5	3	14	48
	13%	10%	39%	26%	16%	15%	15%	13%	7%	18%	10%	29%	11%
		a										l	
Net: At least once a week	34	24	10	4	4	9	6	2	5	2	2	7	27
	7%	6%	20%	22%	6%	9%	10%	3%	5%	9%	6%	15%	6%
		a										l	

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

## LCCI - Topical Q2 2019

**Q6b\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	470	261	209	96	335	39	154	316	223	247	154	295	21
Weighted Total	470	236	234	61	376	33	88	382	183	286	141	304	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	8 2%	8 3%	* *	5 9%	3 1%	* *	6 7%	2 1%	5 3%	3 1%	5 4%	3 1%	- -
		b		d		g				k			
Less than once a day but at least once a week	26 6%	10 4%	16 7%	16 25%	10 3%	* 1%	20 23%	6 2%	19 10%	7 3%	12 8%	14 4%	1 2%
				de			g		i				
Less than once a week but at least once a month	28 6%	14 6%	13 6%	6 9%	20 5%	2 6%	11 12%	17 4%	16 9%	12 4%	11 8%	15 5%	1 6%
							g		i				
Less than once a month but at least once every six months	39 8%	21 9%	17 7%	9 15%	26 7%	4 12%	13 15%	26 7%	16 9%	22 8%	11 8%	23 7%	5 21%
				d			g						
Less than once every six months, but in the last 12 months	29 6%	19 8%	10 4%	3 5%	25 7%	2 5%	8 9%	21 6%	8 4%	21 7%	7 5%	20 7%	2 7%
Never in the last twelve months	341 73%	164 69%	177 76%	23 38%	293 78%	25 76%	30 35%	310 81%	120 65%	221 77%	95 68%	229 75%	16 64%
				c	c		f		h				
<b>NETS</b>													
Net: At least once every six months	100 21%	53 22%	47 20%	35 58%	58 16%	6 20%	50 57%	50 13%	55 30%	45 16%	39 28%	54 18%	7 29%
				de			g		i		k		
Net: At least once a month	62 13%	32 13%	30 13%	26 43%	33 9%	2 7%	37 42%	25 7%	39 21%	23 8%	28 20%	31 10%	2 8%
				de			g		i		k		

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

## LCCI - Topical Q2 2019

**Q6b\_3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall l
Significance Level: 95%													
Unweighted Total	470	261	209	96	335	39	154	316	223	247	154	295	21
Weighted Total	470	236	234	61	376	33	88	382	183	286	141	304	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a week	34	17	17	21	13	*	26	8	23	11	17	16	1
	7%	7%	7%	34%	3%	1%	30%	2%	13%	4%	12%	5%	2%
				de			g		i		k		

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

## LCCI - Topical Q2 2019

**Q6b\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	467	289	178	17	56	104	51	61	70	42	66	45	422
Weighted Total	465	417	48	18	67	96	63	49	110	27	35	46	419
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	5	4	1	-	-	2	2	*	*	*	1	-	5
	1%	1%	2%	-	-	2%	3%	*	*	*	2%	-	1%
Less than once a day but at least once a week	20	12	8	4	2	5	1	3	4	1	1	6	14
	4%	3%	17%	25%	2%	5%	1%	5%	4%	4%	2%	12%	3%
			a									l	
Less than once a week but at least once a month	42	29	13	*	5	11	6	4	11	1	3	5	37
	9%	7%	28%	1%	8%	12%	10%	9%	10%	2%	10%	11%	9%
			a										
Less than once a month but at least once every six months	68	62	6	4	10	15	12	8	15	2	3	8	61
	15%	15%	13%	20%	15%	16%	19%	16%	14%	9%	8%	17%	14%
Less than once every six months, but in the last 12 months	52	46	6	4	12	4	8	9	8	3	5	11	41
	11%	11%	12%	20%	18%	4%	13%	17%	7%	11%	13%	24%	10%
			e		e		e				e	l	
Never in the last twelve months	278	264	13	6	38	59	33	26	73	20	23	16	261
	60%	63%	28%	34%	57%	61%	53%	52%	66%	74%	66%	36%	62%
		b							fg				k
<b>NETS</b>													
Net: At least once every six months	135	107	29	8	17	34	21	15	29	4	7	18	117
	29%	26%	60%	46%	25%	35%	34%	30%	27%	15%	21%	40%	28%
			a			ij	i						

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

## LCCI - Topical Q2 2019

**Q6b\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

**Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London**

Base: All respondents excl. don't know

	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	467	289	178	17	56	104	51	61	70	42	66	45	422
Weighted Total	465	417	48	18	67	96	63	49	110	27	35	46	419
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a month	67	45	23	5	7	19	9	7	14	2	5	11	57
	14%	11%	47%	26%	10%	19%	15%	15%	13%	6%	13%	23%	13%
		a											
Net: At least once a week	25	16	9	4	2	7	3	3	4	1	1	6	19
	5%	4%	20%	25%	2%	7%	4%	6%	4%	4%	3%	12%	5%
		a										l	

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

## LCCI - Topical Q2 2019

**Q6b\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	467	266	201	96	335	36	153	314	222	245	152	294	21
Weighted Total	465	241	224	61	376	28	88	377	184	281	140	302	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	5 1%	2 1%	3 1%	5 8% d	* *	* *	4 5% g	1 *	4 2% i	1 *	2 2%	3 1%	- -
Less than once a day but at least once a week	20 4%	12 5%	8 4%	11 19% de	8 2%	1 2%	13 15% g	7 2%	14 8% i	6 2%	10 7% k	9 3%	2 7%
Less than once a week but at least once a month	42 9%	22 9%	20 9%	11 18% d	27 7%	5 17%	18 21% g	24 6%	22 12% i	20 7%	21 15% k	20 7%	2 9%
Less than once a month but at least once every six months	68 15%	45 18% b	24 11%	10 16%	56 15%	2 7%	16 18%	53 14%	25 14% i	43 15% i	26 18%	37 12%	6 24%
Less than once every six months, but in the last 12 months	52 11%	23 9%	29 13%	6 10%	39 10%	7 25% cd	10 11%	42 11%	21 12% i	30 11% i	17 12%	31 10%	4 16%
Never in the last twelve months	278 60%	137 57%	140 63%	18 30%	246 65% c	14 49% c	26 30%	251 67% f	97 53% i	181 64% h	65 46%	203 67% j	10 44%
<b>NETS</b>													
Net: At least once every six months	135 29%	81 34% b	54 24%	37 60% de	91 24%	7 26%	51 59% g	84 22%	66 36% i	70 25% i	58 42% k	68 22%	9 40%
Net: At least once a month	67 14%	36 15%	31 14%	27 44% de	35 9%	5 19%	36 41% g	31 8%	41 22% i	27 9% i	33 23% k	31 10%	4 16%

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



## LCCI - Topical Q2 2019

**Q6b\_4. In the last twelve months, how often, if at all, has your business been affected by each of the following issues?**

### Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	467	266	201	96	335	36	153	314	222	245	152	294	21
Weighted Total	465	241	224	61	376	28	88	377	184	281	140	302	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Net: At least once a week	25	14	11	16	8	1	18	7	18	7	12	11	2
	5%	6%	5%	26%	2%	2%	20%	2%	10%	2%	9%	4%	7%
			de				g		i		k		

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

## LCCI - Topical Q2 2019

**Q7a. T-Levels will be the equivalent of three A-levels, and offer students a mixture of classroom learning and 'on-the-job' experience during an industry placement of at least 45 days.**

**Would your business be willing to do any of the following?**

Base: All respondents

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Offer an unpaid placement to a T-level student	95	80	15	*	13	21	12	9	25	9	7	8	87
	19%	18%	29%	1%	18%	20%	18%	15%	21%	29%	19%	17%	19%
		a											
Hire someone who has completed T-levels as an employee	93	75	18	2	7	23	21	9	21	6	5	8	85
	18%	17%	35%	10%	10%	22%	32%	15%	17%	22%	13%	16%	19%
		a					dgj						
Offer a paid placement to a T-level student	70	52	18	6	12	16	14	5	12	2	4	15	55
	14%	12%	34%	32%	17%	15%	21%	8%	10%	8%	9%	31%	12%
		a										l	
Offer unpaid placements or work to someone who has completed T-levels	69	58	11	*	9	17	7	7	17	4	7	5	63
	14%	13%	21%	2%	13%	16%	10%	12%	14%	14%	20%	11%	14%
		a											
None of the above	316	301	15	10	44	57	37	38	85	19	26	22	294
	63%	67%	29%	55%	63%	55%	56%	66%	71%	65%	68%	45%	65%
		b						e					k
<b>NETS</b>													
Net: Would offer placement or work	187	150	37	8	26	47	30	19	35	10	12	27	160
	37%	33%	71%	45%	37%	45%	44%	34%	29%	35%	32%	55%	35%
		a				h						l	

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

## LCCI - Topical Q2 2019

**Q7a. T-Levels will be the equivalent of three A-levels, and offer students a mixture of classroom learning and 'on-the-job' experience during an industry placement of at least 45 days.**

**Would your business be willing to do any of the following?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Offer an unpaid placement to a T-level student	95	46	49	27	58	10	32	63	47	48	39	50	6
	19%	18%	20%	42%	14%	31%	36%	15%	24%	16%	27%	15%	23%
				d	d		g		i		k		
Hire someone who has completed T-levels as an employee	93	54	39	24	61	8	30	62	48	44	32	51	10
	18%	21%	16%	37%	15%	26%	34%	15%	24%	15%	22%	15%	39%
				d			g		i				
Offer a paid placement to a T-level student	70	36	34	33	33	4	36	35	45	25	32	34	4
	14%	14%	14%	53%	8%	13%	40%	8%	23%	8%	22%	10%	17%
				de			g		i		k		
Offer unpaid placements or work to someone who has completed T-levels	69	34	35	20	39	10	20	49	31	38	28	34	6
	14%	13%	14%	31%	10%	29%	22%	12%	16%	12%	19%	10%	26%
				d		d	g				k		
None of the above	316	157	159	8	293	15	21	295	98	218	67	236	12
	63%	62%	64%	12%	72%	46%	24%	71%	49%	72%	46%	71%	50%
				ce	c		f		h		j		
<b>NETS</b>													
Net: Would offer placement or work	187	97	90	56	114	18	68	119	101	86	78	96	13
	37%	38%	36%	88%	28%	54%	76%	29%	51%	28%	54%	29%	50%
				de		d	g		i		k		

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

## LCCI - Topical Q2 2019

**Q7b. T-Levels will be the equivalent of three A-levels, and offer students a mixture of classroom learning and 'on-the-job' experience during an industry placement of at least 45 days.**

**Would your business be willing to do any of the following?**

Base: All respondents excl. none of the above

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	*h	*i	*j	k	l	
Significance Level: 95%													
Unweighted Total	246	103	143	8	31	67	32	31	29	22	26	31	215
Weighted Total	187	150	37	8	26	47	30	19	35	10	12	27	160
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Offer an unpaid placement to a T-level student	95	80	15	*	13	21	12	9	25	9	7	8	87
	51%	53%	41%	1%	49%	45%	41%	46%	71%	83%	58%	31%	54%
												k	k
Hire someone who has completed T-levels as an employee	93	75	18	2	7	23	21	9	21	6	5	8	85
	50%	50%	49%	22%	26%	48%	71%	44%	59%	63%	42%	30%	53%
						d	deg					k	k
Offer a paid placement to a T-level student	70	52	18	6	12	16	14	5	12	2	4	15	55
	38%	35%	48%	71%	46%	34%	47%	25%	34%	24%	29%	57%	34%
				a								l	
Offer unpaid placements or work to someone who has completed T-levels	69	58	11	*	9	17	7	7	17	4	7	5	63
	37%	38%	29%	5%	34%	36%	23%	37%	49%	41%	61%	20%	39%
												k	k
<b>NETS</b>													
Net: Would offer placement or work	187	150	37	8	26	47	30	19	35	10	12	27	160
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

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

## LCCI - Topical Q2 2019

**Q7b. T-Levels will be the equivalent of three A-levels, and offer students a mixture of classroom learning and 'on-the-job' experience during an industry placement of at least 45 days.**

**Would your business be willing to do any of the following?**

Base: All respondents excl. none of the above

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London a	Outer London b	Increase c	Stay the same d	Fall *e	Tried to recruit f	Did not try to recruit g	Full capacity h	Below capacity i	Rise j	Stay the same k	Fall *l
Significance Level: 95%													
Unweighted Total	246	144	102	85	138	23	129	117	149	97	101	131	14
Weighted Total	187	97	90	56	114	18	68	119	101	86	78	96	13
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Offer an unpaid placement to a T-level student	95	46	49	27	58	10	32	63	47	48	39	50	6
	51%	47%	55%	48%	51%	56%	48%	53%	47%	55%	50%	52%	47%
Hire someone who has completed T-levels as an employee	93	54	39	24	61	8	30	62	48	44	32	51	10
	50%	55%	43%	42%	54%	47%	45%	52%	48%	51%	41%	53%	79%
Offer a paid placement to a T-level student	70	36	34	33	33	4	36	35	45	25	32	34	4
	38%	37%	38%	60%	29%	23%	52%	29%	45%	29%	41%	36%	35%
				d			g		i				
Offer unpaid placements or work to someone who has completed T-levels	69	34	35	20	39	10	20	49	31	38	28	34	6
	37%	35%	38%	35%	35%	54%	29%	41%	31%	44%	36%	35%	51%
							f			h			
<b>NETS</b>													
Net: Would offer placement or work	187	97	90	56	114	18	68	119	101	86	78	96	13
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

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

## LCCI - Topical Q2 2019

**Q8a. Which of the following, if any, would make you more likely to offer a job/placement to a T-level student or graduate?**

Base: All respondents

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Financial assistance	159	135	23	5	21	37	32	18	25	10	12	17	141
	32%	30%	44%	26%	30%	35%	47%	31%	21%	33%	33%	35%	31%
		a				h	h						
If the student or graduate had been trained in an area where my business has skills shortages	143	118	24	7	21	32	26	13	24	10	9	18	124
	28%	26%	46%	41%	29%	31%	40%	23%	20%	32%	24%	38%	27%
		a				h	h						
More information about T-levels	124	103	21	*	19	33	26	10	19	8	8	13	110
	25%	23%	40%	1%	27%	32%	39%	17%	16%	28%	21%	27%	24%
		a				gh	ghj						
Other	13	13	-	-	2	5	2	-	2	-	3	2	11
	3%	3%	-	-	3%	4%	3%	-	2%	-	8%	4%	3%
		b									g		
None of the above	227	218	9	6	25	35	26	30	72	15	17	9	217
	45%	48%	17%	34%	35%	34%	38%	52%	61%	51%	46%	19%	48%
		b					e	def	e		k		

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

## LCCI - Topical Q2 2019

**Q8a. Which of the following, if any, would make you more likely to offer a job/placement to a T-level student or graduate?**

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Financial assistance	159	79	79	36	114	9	46	112	66	92	60	92	7
	32%	31%	32%	56%	28%	28%	52%	27%	33%	30%	41%	28%	27%
				de			g				k		
If the student or graduate had been trained in an area where my business has skills shortages	143	73	70	36	93	13	42	101	72	71	52	83	8
	28%	29%	28%	57%	23%	40%	47%	24%	36%	23%	36%	25%	33%
				d		d	g		i		k		
More information about T-levels	124	59	64	28	77	18	32	91	55	68	45	71	7
	25%	23%	26%	44%	19%	55%	36%	22%	28%	22%	31%	21%	30%
				d		d	g				k		
Other	13	7	6	-	10	3	2	11	3	10	5	6	2
	3%	3%	2%	-	2%	10%	2%	3%	2%	3%	3%	2%	8%
						cd							
None of the above	227	121	106	4	212	11	12	215	78	149	48	171	9
	45%	48%	42%	6%	52%	32%	13%	52%	39%	49%	33%	51%	34%
				ce		c		f		h		j	

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

## LCCI - Topical Q2 2019

**Q8b. Which of the following, if any, would make you more likely to offer a job/placement to a T-level student or graduate?**

Base: All respondents excl. none of the above

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	326	163	163	13	42	86	39	40	38	27	41	40	286
Weighted Total	276	233	43	12	45	69	41	27	47	15	20	40	237
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Financial assistance	159	135	23	5	21	37	32	18	25	10	12	17	141
	57%	58%	53%	39%	46%	53%	77%	65%	53%	68%	60%	43%	60%
							deh					k	
If the student or graduate had been trained in an area where my business has skills shortages	143	118	24	7	21	32	26	13	24	10	9	18	124
	52%	51%	56%	62%	46%	46%	64%	49%	52%	66%	45%	46%	53%
More information about T-levels	124	103	21	*	19	33	26	10	19	8	8	13	110
	45%	44%	48%	2%	42%	48%	63%	37%	40%	58%	38%	33%	47%
							ghj						
Other	13	13	-	-	2	5	2	-	2	-	3	2	11
	5%	6%	-	-	4%	7%	4%	-	4%	-	14%	5%	5%
		b								g			

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



## LCCI - Topical Q2 2019

**Q8b. Which of the following, if any, would make you more likely to offer a job/placement to a T-level student or graduate?**

Base: All respondents excl. none of the above

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	326	186	140	93	203	30	142	184	170	156	122	188	16
Weighted Total	276	132	144	59	195	22	78	199	121	156	98	162	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Financial assistance	159	79	79	36	114	9	46	112	66	92	60	92	7
	57%	60%	55%	60%	58%	41%	59%	57%	55%	59%	61%	57%	41%
If the student or graduate had been trained in an area where my business has skills shortages	143	73	70	36	93	13	42	101	72	71	52	83	8
	52%	55%	48%	61%	48%	59%	54%	51%	60%	45%	53%	51%	50%
				d					i				
More information about T-levels	124	59	64	28	77	18	32	91	55	68	45	71	7
	45%	45%	45%	47%	40%	81%	41%	46%	46%	44%	46%	44%	45%
				cd									
Other	13	7	6	-	10	3	2	11	3	10	5	6	2
	5%	6%	4%	-	5%	15%	2%	6%	3%	6%	5%	4%	13%
				c	cd								

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

## LCCI - Topical Q2 2019

**Q9a\_SUM.** The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over  $\text{\pounds}30,000$ . To what extent do you agree or disagree with the following statements about the proposed  $\text{\pounds}30,000$  salary threshold for EU and non-EU migrants working in the UK?

### SUMMARY TABLE

Base: All respondents

	Total	Agree strongly	Tend to agree	Tend to disagree	Disagree strongly	Don't know	NETS		
							Agree	Disagree	Mean
A $\text{\pounds}30,000$ salary threshold on migrants would reduce the supply of low-skilled labour for London businesses	503 100%	157 31%	186 37%	67 13%	47 9%	46 9%	343 68%	114 23%	3.0
There should not be any difference in the salary threshold for EU and non-EU migrants	503 100%	174 35%	162 32%	77 15%	35 7%	55 11%	336 67%	112 22%	3.1
A $\text{\pounds}30,000$ salary threshold on migrants would worsen skills shortages in the capital	503 100%	142 28%	144 29%	100 20%	60 12%	57 11%	286 57%	159 32%	2.8
A $\text{\pounds}30,000$ salary threshold would jeopardise the building and development of housing and infrastructure projects in London	503 100%	119 24%	132 26%	100 20%	62 12%	90 18%	251 50%	162 32%	2.7
A $\text{\pounds}30,000$ salary threshold on migrants would increase the skills level of the London workforce	503 100%	49 10%	138 27%	143 28%	94 19%	79 16%	187 37%	238 47%	2.3
London should have a lower salary threshold for migrants than the rest of the UK	503 100%	62 12%	49 10%	155 31%	160 32%	77 15%	111 22%	315 63%	2.0

## LCCI - Topical Q2 2019

**Q9a\_1. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would reduce the supply of low-skilled labour for London businesses

Base: All respondents

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454	
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	157 31%	143 32%	14 27%	8 42%	22 32%	31 30%	20 30%	20 36%	28 24%	12 41%	15 39%	14 30%	142 31%	
Tend to agree (3)	186 37%	165 37%	21 40%	3 16%	20 28%	38 37%	35 52% dgij	19 34%	51 43%	8 27%	12 32%	11 23%	175 38% k	
Tend to disagree (2)	67 13%	61 14%	6 11%	5 29%	16 23% fg	13 12%	6 9%	3 5%	15 13%	6 19%	4 11%	17 35% l	50 11%	
Disagree strongly (1)	47 9%	42 9%	5 9%	2 10%	8 11%	13 13% f	2 3%	8 14% f	11 9%	2 6%	2 5%	4 8%	43 9%	
Don't know	46 9%	40 9%	6 12%	* 2%	4 6%	9 9%	4 6%	7 12%	14 12%	2 8%	5 13%	2 5%	44 10%	
<b>NETS</b>														
Net: Agree	343 68%	307 68%	35 67%	11 59%	42 60%	69 66%	55 82% deh	40 70%	79 66%	20 68%	27 71%	26 52%	317 70% k	
Net: Disagree	114 23%	103 23%	11 21%	7 39%	24 34% fj	26 25%	8 12%	11 19%	26 22%	7 25%	6 16%	21 43% l	93 21%	
Mean score	3.0	3.0	3.0	2.9	2.9	2.9	3.2	3.0	2.9	3.1	3.2 d	2.8	3.0	
Standard deviation	.95	.95	.94	1.09	1.02	1.01	.72	1.06	.91	.97	.88	.99	.94	
Standard error	.04	.06	.07	.27	.14	.10	.10	.14	.11	.15	.11	.14	.05	

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

## LCCI - Topical Q2 2019

**Q9a\_1. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would reduce the supply of low-skilled labour for London businesses

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	157 31%	81 32%	76 30%	19 30%	128 31%	10 32%	33 37%	124 30%	55 28%	102 33%	57 39%	91 27%	9 34%
Tend to agree (3)	186 37%	82 32%	104 42% a	22 35%	153 38%	11 33%	28 31%	158 38%	66 33%	120 39%	43 29%	137 41% j	6 24%
Tend to disagree (2)	67 13%	41 16%	27 11%	15 23% d	49 12%	4 12%	20 23% g	47 11%	34 17%	34 11%	22 15%	39 12%	7 27%
Disagree strongly (1)	47 9%	27 11%	20 8%	4 6%	38 9%	5 15%	4 5%	43 10% f	20 10%	26 9%	12 8%	33 10%	2 7%
Don't know	46 9%	22 9%	24 10%	4 6%	40 10%	3 8%	4 4%	42 10% f	23 12%	23 7%	12 8%	32 10%	2 8%
<b>NETS</b>													
Net: Agree	343 68%	163 64%	180 72%	41 64%	281 69%	21 64%	61 68%	282 68%	121 61%	222 73% h	100 68%	228 69%	15 58%
Net: Disagree	114 23%	68 27% b	46 18%	19 29%	87 21%	9 27%	25 28%	90 22%	54 27% i	60 20%	34 24%	71 21%	9 34%
Mean score	3.0	2.9	3.0	2.9	3.0	2.9	3.0	3.0	2.9	3.1	3.1	3.0	2.9
Standard deviation	.95	1.00	.89	.92	.95	1.08	.91	.96	.98	.93	.98	.93	1.01
Standard error	.04	.06	.06	.09	.05	.18	.07	.05	.07	.06	.08	.05	.22

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

## LCCI - Topical Q2 2019

**Q9a\_2. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would worsen skills shortages in the capital

Base: All respondents

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	*c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454	
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	142	131	11	6	23	32	16	14	30	10	12	13	129	
	28%	29%	21%	31%	32%	31%	24%	25%	25%	33%	33%	26%	28%	
		b												
Tend to agree (3)	144	127	17	8	15	27	29	16	26	10	12	15	129	
	29%	28%	33%	46%	22%	26%	43%	28%	21%	35%	33%	31%	28%	
							deh							
Tend to disagree (2)	100	90	9	4	21	22	9	6	28	5	5	15	85	
	20%	20%	18%	20%	30%	21%	13%	11%	23%	17%	14%	30%	19%	
					fgj									
Disagree strongly (1)	60	52	8	*	9	11	7	9	20	2	1	4	56	
	12%	12%	15%	1%	12%	10%	11%	15%	17%	6%	4%	8%	12%	
								j	j					
Don't know	57	50	7	*	2	12	6	12	16	3	6	2	55	
	11%	11%	14%	2%	3%	12%	9%	21%	13%	9%	16%	5%	12%	
								d	d		d			
<b>NETS</b>														
Net: Agree	286	258	28	14	38	59	45	30	55	20	25	28	258	
	57%	57%	54%	77%	54%	57%	67%	53%	46%	68%	66%	57%	57%	
							h		h	h				
Net: Disagree	159	142	17	4	30	33	16	15	48	7	7	19	141	
	32%	32%	33%	20%	43%	31%	24%	26%	41%	23%	18%	38%	31%	
					ij	j			j					
Mean score	2.8	2.8	2.7	3.1	2.8	2.9	2.9	2.8	2.6	3.0	3.1	2.8	2.8	
									h	dh				
Standard deviation	1.02	1.02	1.03	.75	1.06	1.03	.94	1.10	1.10	.93	.86	.95	1.03	
Standard error	.05	.06	.08	.18	.14	.10	.13	.15	.14	.14	.11	.14	.05	

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

## LCCI - Topical Q2 2019

**Q9a\_2. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would worsen skills shortages in the capital

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 142	78	64	17	115	10	28	114	50	92	46	88	8
	28%	31%	25%	27%	28%	30%	31%	27%	25%	30%	32%	26%	31%
Tend to agree	(3) 144	62	83	21	117	7	28	117	56	88	48	94	3
	29%	24%	33%	33%	29%	21%	31%	28%	28%	29%	33%	28%	11%
			a										
Tend to disagree	(2) 100	54	46	12	80	8	18	82	49	51	25	69	6
	20%	21%	18%	19%	20%	24%	20%	20%	25%	17%	17%	21%	25%
									i				
Disagree strongly	(1) 60	31	29	11	43	6	10	49	21	39	17	38	5
	12%	12%	11%	18%	11%	18%	11%	12%	11%	13%	12%	11%	19%
Don't know	57	28	29	2	53	3	5	52	23	35	10	44	3
	11%	11%	12%	4%	13%	8%	6%	13%	11%	11%	7%	13%	14%
					c			f				j	
<b>NETS</b>													
Net: Agree	286	140	146	38	232	17	56	230	106	180	94	182	11
	57%	55%	59%	60%	57%	51%	62%	56%	53%	59%	64%	55%	42%
											k		
Net: Disagree	159	85	74	23	122	14	28	131	70	90	42	107	11
	32%	34%	30%	37%	30%	42%	32%	32%	35%	29%	29%	32%	44%
Mean score	2.8	2.8	2.8	2.7	2.9	2.7	2.9	2.8	2.8	2.9	2.9	2.8	2.6
Standard deviation	1.02	1.06	.99	1.07	1.01	1.14	1.02	1.03	.99	1.04	1.01	1.02	1.21
Standard error	.05	.07	.07	.11	.06	.19	.08	.06	.07	.07	.08	.06	.28

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

## LCCI - Topical Q2 2019

**Q9a\_3. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

**A Â£30,000 salary threshold would jeopardise the building and development of housing and infrastructure projects in London**

Base: All respondents

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454	
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	119 24%	109 24%	11 20%	6 30%	14 21%	17 16%	17 25%	13 23%	33 28%	9 31%	9 25%	10 21%	109 24%	
Tend to agree (3)	132 26%	114 25%	18 35% a	3 15%	27 38% hi	25 24%	23 34% i	14 24%	25 21%	5 16%	11 29%	17 34%	115 25%	
Tend to disagree (2)	100 20%	92 21%	8 15%	8 42%	9 13%	27 26% df	7 10%	11 20%	23 20%	10 34% dfj	5 14%	12 25%	88 19%	
Disagree strongly (1)	62 12%	56 12%	6 12%	- -	18 25% egij	9 9%	9 14%	5 8%	16 14%	2 7%	2 6%	6 12%	56 12%	
Don't know	90 18%	80 18%	9 18%	2 13%	2 3%	26 25% d	11 17% d	14 25% d	21 17% d	3 11%	10 26% d	4 9%	85 19%	
<b>NETS</b>														
Net: Agree	251 50%	222 49%	29 55%	8 45%	41 59% e	42 40%	40 59% e	27 47%	59 49%	14 47%	20 54%	27 55%	224 49%	
Net: Disagree	162 32%	148 33%	14 27%	8 42%	26 38% j	36 35% j	16 24%	16 28%	40 33% j	12 41% j	8 21%	18 36%	144 32%	
Mean score	2.7	2.7	2.8	2.9	2.6	2.6	2.9	2.8	2.8	2.8	3.0 de	2.7	2.8	
Standard deviation	1.03	1.04	.99	.93	1.10	.96	1.04	1.00	1.09	1.03	.95	.97	1.04	
Standard error	.05	.07	.08	.24	.14	.11	.15	.14	.14	.17	.13	.15	.05	

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

## LCCI - Topical Q2 2019

**Q9a\_3. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

**A Â£30,000 salary threshold would jeopardise the building and development of housing and infrastructure projects in London**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 119	70	50	17	92	10	29	90	43	77	38	77	5
	24%	27%	20%	27%	23%	31%	32%	22%	22%	25%	26%	23%	19%
							g						
Tend to agree	(3) 132	53	79	18	108	6	21	111	57	75	37	89	6
	26%	21%	31%	28%	27%	18%	24%	27%	29%	25%	25%	27%	24%
			a										
Tend to disagree	(2) 100	55	45	17	76	7	20	81	37	63	26	65	9
	20%	22%	18%	26%	19%	23%	22%	19%	19%	21%	18%	20%	35%
Disagree strongly	(1) 62	33	29	8	48	6	8	53	23	38	15	44	2
	12%	13%	11%	13%	12%	18%	9%	13%	12%	13%	10%	13%	9%
Don't know	90	42	48	4	82	3	11	79	38	52	29	57	3
	18%	17%	19%	6%	20%	11%	12%	19%	19%	17%	20%	17%	13%
					c								
<b>NETS</b>													
Net: Agree	251	123	128	35	200	16	50	201	100	151	75	165	11
	50%	49%	51%	55%	49%	49%	56%	49%	50%	50%	51%	50%	43%
Net: Disagree	162	88	74	25	124	13	28	134	61	101	41	110	11
	32%	35%	30%	39%	31%	41%	32%	32%	31%	33%	28%	33%	44%
Mean score	2.7	2.8	2.7	2.7	2.8	2.7	2.9	2.7	2.7	2.7	2.8	2.7	2.6
Standard deviation	1.03	1.08	.99	1.03	1.02	1.17	1.03	1.03	1.01	1.05	1.03	1.04	.96
Standard error	.05	.07	.07	.11	.06	.20	.09	.06	.07	.07	.09	.06	.22

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



## LCCI - Topical Q2 2019

**Q9a\_4. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over £30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A £30,000 salary threshold on migrants would increase the skills level of the London workforce

Base: All respondents

	BUSINESS SIZE			INDUSTRY										MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services		
	a	b	*c	d	e	f	g	h	i	j	k	l			
Significance Level: 95%															
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454		
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454		
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%		
Agree strongly (4)	49	41	8	2	15	14	5	1	7	2	2	8	41		
	10%	9%	15%	10%	22%	13%	8%	1%	6%	8%	5%	16%	9%		
		a			fghj	g									
Tend to agree (3)	138	123	15	5	24	22	16	16	41	7	7	14	124		
	27%	27%	29%	26%	35%	21%	24%	27%	35%	23%	18%	29%	27%		
					ej				ej						
Tend to disagree (2)	143	128	15	8	17	32	21	16	29	11	10	19	125		
	28%	28%	28%	42%	24%	30%	31%	29%	25%	37%	26%	38%	27%		
Disagree strongly (1)	94	88	6	4	5	20	17	13	20	6	10	4	90		
	19%	19%	12%	20%	8%	19%	25%	22%	17%	21%	25%	9%	20%		
		b			d	d	d	d	d	d	d				
Don't know	79	71	8	*	8	17	8	12	21	3	10	4	75		
	16%	16%	15%	2%	11%	16%	12%	20%	18%	11%	26%	9%	16%		
					d										
<b>NETS</b>															
Net: Agree	187	164	23	6	40	36	22	16	49	9	9	22	165		
	37%	36%	44%	35%	57%	35%	32%	29%	41%	31%	23%	45%	36%		
					efgj				j						
Net: Disagree	238	216	21	11	22	51	38	29	49	17	19	23	215		
	47%	48%	41%	62%	32%	49%	56%	51%	42%	58%	51%	46%	47%		
					d	d	d	d	d	d	d				
Mean score	2.3	2.3	2.6	2.3	2.8	2.3	2.2	2.1	2.4	2.2	2.0	2.6	2.3		
			a		efghij										
Standard deviation	.95	.94	.95	.92	.91	1.01	.95	.83	.89	.92	.94	.89	.95		
Standard error	.05	.06	.07	.22	.12	.10	.14	.11	.11	.14	.13	.13	.05		

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

## LCCI - Topical Q2 2019

**Q9a\_4. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would increase the skills level of the London workforce

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 49 10%	22 9%	26 10%	12 19% d	35 9%	2 6%	12 14%	36 9%	29 15% i	20 6%	21 14% k	27 8%	* 1%
Tend to agree	(3) 138 27%	71 28%	67 27%	16 26%	110 27%	11 34%	23 26%	115 28%	53 27%	85 28%	36 25%	92 28%	10 41%
Tend to disagree	(2) 143 28%	71 28%	72 29%	24 38% e	116 28% e	4 11%	28 31%	115 28%	48 24%	95 31%	43 30%	93 28%	7 27%
Disagree strongly	(1) 94 19%	52 21%	42 17%	6 10%	77 19% c	11 35% cd	16 18%	78 19%	37 19%	57 19%	28 19%	61 18%	6 23%
Don't know	79 16%	36 14%	43 17%	5 8%	69 17% c	5 14%	10 11%	69 17%	31 16%	48 16%	18 12%	59 18%	2 8%
<b>NETS</b>													
Net: Agree	187 37%	93 37%	93 37%	28 44%	145 36%	13 40%	36 40%	151 37%	82 41%	105 34%	57 39%	119 36%	10 42%
Net: Disagree	238 47%	123 49%	114 46%	30 47%	192 47%	15 46%	44 49%	193 47%	85 43%	152 50%	71 49%	154 46%	13 50%
Mean score	2.3	2.3	2.4	2.6 de	2.3	2.1	2.4	2.3	2.4	2.3	2.4	2.3	2.2
Standard deviation	.95	.95	.95	.94	.94	1.05	.98	.94	1.02	.89	1.01	.93	.86
Standard error	.05	.06	.07	.10	.05	.18	.08	.06	.07	.06	.09	.06	.19

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

## LCCI - Topical Q2 2019

**Q9a\_5. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

**There should not be any difference in the salary threshold for EU and non-EU migrants**

Base: All respondents

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	*c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454	
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	174 35%	159 35%	16 30%	9 50%	24 35%	37 36%	28 42%	18 31%	32 27%	11 36%	14 38%	20 40%	155 34%	
Tend to agree (3)	162 32%	143 32%	19 37%	3 17%	26 37%	28 27%	20 30%	21 36%	41 34%	13 42%	11 28%	14 29%	148 33%	
Tend to disagree (2)	77 15%	69 15%	8 15%	5 29%	7 10%	17 17%	10 16%	5 9%	24 20%	3 10%	4 11%	10 21%	67 15%	
Disagree strongly (1)	35 7%	31 7%	4 8%	* 1%	7 10%	9 8%	4 6%	4 7%	8 7%	1 4%	2 5%	3 6%	32 7%	
Don't know	55 11%	49 11%	5 10%	* 2%	6 9%	12 12%	4 5%	10 17%	14 12%	2 8%	7 18%	2 5%	52 12%	
<b>NETS</b>														
Net: Agree	336 67%	301 67%	35 67%	12 68%	50 72%	65 63%	49 73%	39 68%	73 61%	23 78%	25 66%	34 69%	303 67%	
Net: Disagree	112 22%	100 22%	12 23%	5 30%	14 20%	26 25%	15 22%	9 16%	32 27%	4 14%	6 16%	13 26%	99 22%	
Mean score	3.1	3.1	3.0	3.2	3.1	3.0	3.2	3.1	2.9	3.2	3.2	3.1	3.1	
Standard deviation	.93	.93	.94	.92	.96	1.00	.93	.90	.92	.81	.91	.95	.93	
Standard error	.04	.06	.07	.22	.13	.10	.13	.12	.11	.12	.12	.14	.05	

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

## LCCI - Topical Q2 2019

**Q9a\_5. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

**There should not be any difference in the salary threshold for EU and non-EU migrants**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 174	93	82	18	148	9	28	146	66	108	42	123	8
	35%	37%	33%	28%	36%	27%	32%	35%	33%	35%	29%	37%	34%
Tend to agree	(3) 162	78	84	27	126	10	30	132	62	101	55	101	7
	32%	31%	34%	42%	31%	29%	33%	32%	31%	33%	38%	30%	27%
				d									
Tend to disagree	(2) 77	37	40	14	55	8	19	58	25	52	24	47	6
	15%	15%	16%	22%	14%	23%	21%	14%	12%	17%	16%	14%	25%
				d									
Disagree strongly	(1) 35	22	13	3	28	4	3	32	19	16	14	19	2
	7%	9%	5%	5%	7%	11%	3%	8%	9%	5%	10%	6%	7%
Don't know	55	24	31	2	49	3	10	45	27	28	11	42	2
	11%	9%	12%	3%	12%	10%	11%	11%	14%	9%	7%	13%	7%
				c									
<b>NETS</b>													
Net: Agree	336	170	166	44	274	18	58	278	128	208	97	224	15
	67%	67%	66%	70%	67%	56%	65%	67%	64%	68%	67%	67%	60%
Net: Disagree	112	59	53	17	84	11	22	90	43	68	38	66	8
	22%	23%	21%	27%	21%	34%	24%	22%	22%	22%	26%	20%	32%
				d									
Mean score	3.1	3.1	3.1	3.0	3.1	2.8	3.0	3.1	3.0	3.1	2.9	3.1	2.9
Standard deviation	.93	.97	.89	.85	.94	1.02	.86	.95	.99	.90	.96	.91	.99
Standard error	.04	.06	.06	.09	.05	.17	.07	.05	.07	.06	.08	.05	.22

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

## LCCI - Topical Q2 2019

**Q9a\_6. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over £30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

**London should have a lower salary threshold for migrants than the rest of the UK**

Base: All respondents

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454	
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	62 12%	54 12%	8 15%	4 22%	10 14%	13 12%	11 16%	4 7%	12 10%	3 9%	6 16%	7 13%	56 12%	
Tend to agree (3)	49 10%	40 9%	9 17%	2 11%	6 8%	9 9%	11 16%	1 2%	14 12%	3 10%	2 6%	5 10%	44 10%	
			a				g		g					
Tend to disagree (2)	155 31%	142 31%	13 25%	6 34%	22 31%	32 31%	16 24%	21 36%	40 33%	9 30%	10 26%	16 32%	139 31%	
Disagree strongly (1)	160 32%	146 32%	14 27%	5 30%	30 43%	31 30%	24 35%	20 35%	29 24%	12 41%	9 24%	19 40%	141 31%	
					hj			d	d		d		k	
Don't know	77 15%	68 15%	9 17%	1 3%	2 3%	19 18%	6 9%	11 20%	25 21%	3 10%	10 27%	2 5%	75 16%	
<b>NETS</b>														
Net: Agree	111 22%	94 21%	17 32%	6 33%	16 23%	22 21%	22 32%	5 9%	26 22%	6 19%	9 23%	12 24%	99 22%	
			a		g	g	g		g		g			
Net: Disagree	315 63%	288 64%	27 52%	12 64%	52 74%	63 61%	39 59%	41 71%	69 58%	21 70%	19 51%	35 71%	280 62%	
		b			hj		j		j					
Mean score	2.0	2.0	2.2	2.3	1.9	2.0	2.1	1.8	2.1	1.9	2.2	2.0	2.0	
			a						g					
Standard deviation	1.04	1.03	1.10	1.16	1.07	1.04	1.13	.88	.97	1.00	1.14	1.05	1.04	
Standard error	.05	.06	.09	.29	.14	.11	.16	.12	.12	.16	.16	.16	.05	

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

## LCCI - Topical Q2 2019

**Q9a\_6. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

**London should have a lower salary threshold for migrants than the rest of the UK**

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 62	40	22	11	49	2	16	46	25	37	17	45	1
	12%	16%	9%	18%	12%	7%	18%	11%	13%	12%	11%	13%	2%
		b					g						
Tend to agree	(3) 49	21	27	8	36	4	10	38	26	23	20	25	4
	10%	8%	11%	13%	9%	13%	12%	9%	13%	7%	13%	8%	16%
									i		k		
Tend to disagree	(2) 155	73	82	15	134	5	24	131	62	93	48	100	7
	31%	29%	33%	24%	33%	16%	27%	32%	31%	30%	33%	30%	27%
					e								
Disagree strongly	(1) 160	81	79	23	120	18	27	134	55	106	43	107	10
	32%	32%	32%	36%	29%	55%	30%	32%	27%	35%	30%	32%	40%
						cd							
Don't know	77	38	39	6	68	3	12	65	30	47	18	55	4
	15%	15%	16%	10%	17%	10%	14%	16%	15%	15%	13%	17%	16%
<b>NETS</b>													
Net: Agree	111	61	50	20	85	6	26	84	52	59	36	70	5
	22%	24%	20%	31%	21%	20%	30%	20%	26%	19%	25%	21%	18%
				d			g						
Net: Disagree	315	154	161	38	254	23	51	264	116	199	91	207	17
	63%	61%	65%	59%	63%	71%	57%	64%	59%	65%	62%	62%	66%
Mean score	2.0	2.1	2.0	2.1	2.0	1.7	2.2	2.0	2.1	2.0	2.1	2.0	1.8
				e			g						
Standard deviation	1.04	1.10	.97	1.16	1.02	.99	1.13	1.01	1.04	1.03	1.01	1.06	.87
Standard error	.05	.07	.07	.12	.06	.17	.10	.06	.07	.07	.09	.06	.19

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

## LCCI - Topical Q2 2019

**Q9b\_SUM.** The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over **£30,000**. To what extent do you agree or disagree with the following statements about the proposed **£30,000** salary threshold for EU and non-EU migrants working in the UK?

### SUMMARY TABLE

Base: All respondents excl. don't know

	Total	Agree strongly	Tend to agree	Tend to disagree	Disagree strongly	NETS		Mean
						Agree	Disagree	
A £30,000 salary threshold on migrants would reduce the supply of low-skilled labour for London businesses	457 100%	157 34%	186 41%	67 15%	47 10%	343 75%	114 25%	3.0
There should not be any difference in the salary threshold for EU and non-EU migrants	448 100%	174 39%	162 36%	77 17%	35 8%	336 75%	112 25%	3.1
A £30,000 salary threshold on migrants would worsen skills shortages in the capital	446 100%	142 32%	144 32%	100 22%	60 13%	286 64%	159 36%	2.8
A £30,000 salary threshold would jeopardise the building and development of housing and infrastructure projects in London	413 100%	119 29%	132 32%	100 24%	62 15%	251 61%	162 39%	2.7
A £30,000 salary threshold on migrants would increase the skills level of the London workforce	424 100%	49 11%	138 33%	143 34%	94 22%	187 44%	238 56%	2.3
London should have a lower salary threshold for migrants than the rest of the UK	426 100%	62 15%	49 11%	155 36%	160 38%	111 26%	315 74%	2.0

## LCCI - Topical Q2 2019

**Q9b\_1. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A £30,000 salary threshold on migrants would reduce the supply of low-skilled labour for London businesses

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	456	284	172	17	57	100	50	61	66	43	62	47	409	
Weighted Total	457	411	46	18	66	95	63	51	105	27	33	47	410	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	157 34%	143 35%	14 31%	8 43%	22 34%	31 32%	20 32%	20 40%	28 27%	12 44%	15 45% h	14 31%	142 35%	
Tend to agree (3)	186 41%	165 40%	21 46%	3 17%	20 30%	38 40%	35 55% di	19 38%	51 48% di	8 29%	12 37%	11 24%	175 43% k	
Tend to disagree (2)	67 15%	61 15%	6 13%	5 30%	16 24% fg	13 13%	6 9%	3 5%	15 14%	6 20% g	4 13%	17 37% l	50 12%	
Disagree strongly (1)	47 10%	42 10%	5 10%	2 10%	8 11%	13 14% f	2 3%	8 16% f	11 10%	2 7%	2 5%	4 8%	43 10%	
<b>NETS</b>														
Net: Agree	343 75%	307 75%	35 77%	11 60%	42 64%	69 73%	55 88% de	40 79%	79 75%	20 73%	27 82% d	26 55%	317 77% k	
Net: Disagree	114 25%	103 25%	11 23%	7 40%	24 36% fj	26 27% f	8 12%	11 21%	26 25%	7 27%	6 18%	21 45% l	93 23%	
Mean score	3.0	3.0	3.0	2.9	2.9	2.9	3.2	3.0	2.9	3.1	3.2 d	2.8	3.0	
Standard deviation	.95	.95	.94	1.09	1.02	1.01	.72	1.06	.91	.97	.88	.99	.94	
Standard error	.04	.06	.07	.27	.14	.10	.10	.14	.11	.15	.11	.14	.05	

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



## LCCI - Topical Q2 2019

**Q9b\_1. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would reduce the supply of low-skilled labour for London businesses

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	456	255	201	95	325	36	149	307	212	244	147	289	20
Weighted Total	457	231	226	59	367	30	86	371	175	282	134	300	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 157 34%	81 35%	76 33%	19 32%	128 35%	10 34%	33 38%	124 33%	55 31%	102 36%	57 43%	91 30%	9 37%
Tend to agree	(3) 186 41%	82 35%	104 46%	22 37%	153 42%	11 36%	28 33%	158 42%	66 38%	120 43%	43 32%	137 46%	6 26%
Tend to disagree	(2) 67 15%	41 18%	27 12%	15 25%	49 13%	4 13%	20 24%	47 13%	34 19%	34 12%	22 16%	39 13%	7 29%
Disagree strongly	(1) 47 10%	27 12%	20 9%	4 7%	38 10%	5 16%	4 5%	43 11%	20 12%	26 9%	12 9%	33 11%	2 8%
<b>NETS</b>													
Net: Agree	343 75%	163 71%	180 80%	41 69%	281 76%	21 70%	61 71%	282 76%	121 69%	222 79%	100 74%	228 76%	15 63%
Net: Disagree	114 25%	68 29%	46 20%	19 31%	87 24%	9 30%	25 29%	90 24%	54 31%	60 21%	34 26%	71 24%	9 37%
Mean score	3.0	2.9	3.0	2.9	3.0	2.9	3.0	3.0	2.9	3.1	3.1	3.0	2.9
Standard deviation	.95	1.00	.89	.92	.95	1.08	.91	.96	.98	.93	.98	.93	1.01
Standard error	.04	.06	.06	.09	.05	.18	.07	.05	.07	.06	.08	.05	.22

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

## LCCI - Topical Q2 2019

**Q9b\_2. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would worsen skills shortages in the capital

Base: All respondents excl. don't know

	Total	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
		a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%														
Unweighted Total	443	276	167	17	57	98	50	54	66	41	60	47	396	
Weighted Total	446	400	45	18	67	92	61	45	103	27	32	47	399	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	142 32%	131 33%	11 24%	6 32%	23 33%	32 35%	16 26%	14 31%	30 29%	10 36%	12 39%	13 28%	129 32%	
Tend to agree (3)	144 32%	127 32%	17 38%	8 48%	15 22%	27 30%	29 48%	16 35%	26 25%	10 38%	12 39%	15 32%	129 32%	
Tend to disagree (2)	100 22%	90 23%	9 21%	4 20%	21 31%	22 24%	9 15%	6 14%	28 27%	5 18%	5 17%	15 32%	85 21%	
Disagree strongly (1)	60 13%	52 13%	8 17%	* 1%	9 13%	11 12%	7 12%	9 20%	20 20%	2 7%	1 4%	4 8%	56 14%	
								j	j					
<b>NETS</b>														
Net: Agree	286 64%	258 64%	28 62%	14 79%	38 56%	59 64%	45 73%	30 67%	55 53%	20 75%	25 78%	28 60%	258 65%	
Net: Disagree	159 36%	142 36%	17 38%	4 21%	30 44%	33 36%	16 27%	15 33%	48 47%	7 25%	7 22%	19 40%	141 35%	
Mean score	2.8	2.8	2.7	3.1	2.8	2.9	2.9	2.8	2.6	3.0	3.1	2.8	2.8	
Standard deviation	1.02	1.02	1.03	.75	1.06	1.03	.94	1.10	1.10	.93	.86	.95	1.03	
Standard error	.05	.06	.08	.18	.14	.10	.13	.15	.14	.14	.11	.14	.05	

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

## LCCI - Topical Q2 2019

**Q9b\_2. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A £30,000 salary threshold on migrants would worsen skills shortages in the capital

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	443	246	197	94	312	37	144	299	209	234	149	275	19
Weighted Total	446	225	221	61	354	30	84	361	176	270	135	288	22
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 142	78	64	17	115	10	28	114	50	92	46	88	8
	32%	35%	29%	28%	32%	32%	33%	31%	28%	34%	34%	31%	36%
Tend to agree	(3) 144	62	83	21	117	7	28	117	56	88	48	94	3
	32%	27%	38%	34%	33%	23%	33%	32%	32%	33%	35%	32%	13%
		a											
Tend to disagree	(2) 100	54	46	12	80	8	18	82	49	51	25	69	6
	22%	24%	21%	20%	23%	26%	21%	23%	28%	19%	18%	24%	29%
									i				
Disagree strongly	(1) 60	31	29	11	43	6	10	49	21	39	17	38	5
	13%	14%	13%	18%	12%	19%	12%	14%	12%	14%	12%	13%	22%
<b>NETS</b>													
Net: Agree	286	140	146	38	232	17	56	230	106	180	94	182	11
	64%	62%	66%	62%	65%	55%	66%	64%	60%	67%	69%	63%	49%
Net: Disagree	159	85	74	23	122	14	28	131	70	90	42	107	11
	36%	38%	34%	38%	35%	45%	34%	36%	40%	33%	31%	37%	51%
Mean score	2.8	2.8	2.8	2.7	2.9	2.7	2.9	2.8	2.8	2.9	2.9	2.8	2.6
Standard deviation	1.02	1.06	.99	1.07	1.01	1.14	1.02	1.03	.99	1.04	1.01	1.02	1.21
Standard error	.05	.07	.07	.11	.06	.19	.08	.06	.07	.07	.08	.06	.28

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

## LCCI - Topical Q2 2019

**Q9b\_3. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

**A Â£30,000 salary threshold would jeopardise the building and development of housing and infrastructure projects in London**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	411	254	157	15	58	83	47	54	63	38	53	45	366	
Weighted Total	413	370	43	16	68	78	56	43	99	26	28	45	369	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	119 29%	109 29%	11 25%	6 35%	14 21%	17 22%	17 31%	13 31%	33 34%	9 35%	9 34%	10 23%	109 30%	
Tend to agree (3)	132 32%	114 31%	18 43%	3 17%	27 39%	25 32%	23 41%	14 32%	25 26%	5 19%	11 39%	17 37%	115 31%	
Tend to disagree (2)	100 24%	92 25%	8 19%	8 48%	9 13%	27 34%	7 12%	11 26%	23 24%	10 39%	5 19%	12 27%	88 24%	
Disagree strongly (1)	62 15%	56 15%	6 14%	- -	18 26%	9 12%	9 16%	5 11%	16 17%	2 8%	2 8%	6 13%	56 15%	
<b>NETS</b>														
Net: Agree	251 61%	222 60%	29 67%	8 52%	41 61%	42 54%	40 71%	27 63%	59 60%	14 54%	20 72%	27 60%	224 61%	
Net: Disagree	162 39%	148 40%	14 33%	8 48%	26 39%	36 46%	16 29%	16 37%	40 40%	12 46%	8 28%	18 40%	144 39%	
Mean score	2.7	2.7	2.8	2.9	2.6	2.6	2.9	2.8	2.8	2.8	3.0	2.7	2.8	
Standard deviation	1.03	1.04	.99	.93	1.10	.96	1.04	1.00	1.09	1.03	.95	.97	1.04	
Standard error	.05	.07	.08	.24	.14	.11	.15	.14	.14	.17	.13	.15	.05	

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

## LCCI - Topical Q2 2019

**Q9b\_3. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

**A £30,000 salary threshold would jeopardise the building and development of housing and infrastructure projects in London**

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	411	231	180	90	288	33	131	280	195	216	129	263	19
Weighted Total	413	211	202	60	324	30	79	335	161	253	117	275	22
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 119	70	50	17	92	10	29	90	43	77	38	77	5
	29%	33%	25%	29%	28%	35%	37%	27%	27%	30%	33%	28%	21%
							g						
Tend to agree	(3) 132	53	79	18	108	6	21	111	57	75	37	89	6
	32%	25%	39%	30%	33%	20%	27%	33%	36%	30%	32%	32%	28%
			a										
Tend to disagree	(2) 100	55	45	17	76	7	20	81	37	63	26	65	9
	24%	26%	22%	28%	24%	25%	25%	24%	23%	25%	23%	24%	40%
Disagree strongly	(1) 62	33	29	8	48	6	8	53	23	38	15	44	2
	15%	16%	14%	13%	15%	20%	11%	16%	14%	15%	13%	16%	10%
<b>NETS</b>													
Net: Agree	251	123	128	35	200	16	50	201	100	151	75	165	11
	61%	58%	63%	59%	62%	54%	64%	60%	62%	60%	64%	60%	50%
Net: Disagree	162	88	74	25	124	13	28	134	61	101	41	110	11
	39%	42%	37%	41%	38%	46%	36%	40%	38%	40%	36%	40%	50%
Mean score	2.7	2.8	2.7	2.7	2.8	2.7	2.9	2.7	2.7	2.7	2.8	2.7	2.6
Standard deviation	1.03	1.08	.99	1.03	1.02	1.17	1.03	1.03	1.01	1.05	1.03	1.04	.96
Standard error	.05	.07	.07	.11	.06	.20	.09	.06	.07	.07	.09	.06	.22

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

## LCCI - Topical Q2 2019

**Q9b\_4. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would increase the skills level of the London workforce

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	424	260	164	17	54	93	47	56	62	41	54	45	379	
Weighted Total	424	380	44	18	62	87	59	46	98	26	28	45	379	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	49 11%	41 11%	8 18%	2 10%	15 25%	14 16%	5 9%	1 1%	7 8%	2 9%	2 7%	8 17%	41 11%	
			a		fg	h								
Tend to agree (3)	138 33%	123 32%	15 34%	5 26%	24 39%	22 25%	16 28%	16 34%	41 42%	7 26%	7 24%	14 32%	124 33%	
									ej					
Tend to disagree (2)	143 34%	128 34%	15 34%	8 43%	17 28%	32 36%	21 35%	16 36%	29 30%	11 41%	10 35%	19 41%	125 33%	
Disagree strongly (1)	94 22%	88 23%	6 14%	4 21%	5 9%	20 23%	17 29%	13 28%	20 20%	6 24%	10 34%	4 9%	90 24%	
		b			d	d	d	d	d	d	d		k	
<b>NETS</b>														
Net: Agree	187 44%	164 43%	23 52%	6 36%	40 64%	36 41%	22 36%	16 36%	49 50%	9 35%	9 31%	22 49%	165 43%	
					efgij				j					
Net: Disagree	238 56%	216 57%	21 48%	11 64%	22 36%	51 59%	38 64%	29 64%	49 50%	17 65%	19 69%	23 51%	215 57%	
						d	d	d		d	dh			
Mean score	2.3	2.3	2.6	2.3	2.8	2.3	2.2	2.1	2.4	2.2	2.0	2.6	2.3	
			a		efghij									
Standard deviation	.95	.94	.95	.92	.91	1.01	.95	.83	.89	.92	.94	.89	.95	
Standard error	.05	.06	.07	.22	.12	.10	.14	.11	.11	.14	.13	.13	.05	

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

## LCCI - Topical Q2 2019

**Q9b\_4. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

### A Â£30,000 salary threshold on migrants would increase the skills level of the London workforce

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	424	238	186	92	298	34	138	286	203	221	139	265	20
Weighted Total	424	217	207	58	338	28	80	345	167	257	128	273	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 49	22	26	12	35	2	12	36	29	20	21	27	*
	11%	10%	13%	20%	10%	7%	15%	11%	17%	8%	17%	10%	1%
				d					i				
Tend to agree	(3) 138	71	67	16	110	11	23	115	53	85	36	92	10
	33%	33%	32%	28%	33%	39%	29%	33%	32%	33%	28%	34%	44%
Tend to disagree	(2) 143	71	72	24	116	4	28	115	48	95	43	93	7
	34%	33%	35%	41%	34%	13%	35%	33%	29%	37%	34%	34%	29%
				e	e								
Disagree strongly	(1) 94	52	42	6	77	11	16	78	37	57	28	61	6
	22%	24%	20%	11%	23%	40%	20%	23%	22%	22%	22%	22%	25%
					c	cd							
<b>NETS</b>													
Net: Agree	187	93	93	28	145	13	36	151	82	105	57	119	10
	44%	43%	45%	48%	43%	46%	45%	44%	49%	41%	45%	44%	45%
Net: Disagree	238	123	114	30	192	15	44	193	85	152	71	154	13
	56%	57%	55%	52%	57%	54%	55%	56%	51%	59%	55%	56%	55%
Mean score	2.3	2.3	2.4	2.6	2.3	2.1	2.4	2.3	2.4	2.3	2.4	2.3	2.2
				de									
Standard deviation	.95	.95	.95	.94	.94	1.05	.98	.94	1.02	.89	1.01	.93	.86
Standard error	.05	.06	.07	.10	.05	.18	.08	.06	.07	.06	.09	.06	.19

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

## LCCI - Topical Q2 2019

**Q9b\_5. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

**There should not be any difference in the salary threshold for EU and non-EU migrants**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	449	276	173	17	56	97	52	59	67	43	58	47	402	
Weighted Total	448	401	47	18	64	92	63	48	105	27	31	47	402	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	174 39%	159 39%	16 33%	9 52%	24 38%	37 41%	28 45%	18 37%	32 30%	11 39%	14 46%	20 42%	155 38%	
Tend to agree (3)	162 36%	143 36%	19 41%	3 18%	26 40%	28 31%	20 32%	21 43%	41 39%	13 46%	11 34%	14 30%	148 37%	
Tend to disagree (2)	77 17%	69 17%	8 16%	5 30%	7 11%	17 19%	10 17%	5 11%	24 23%	3 11%	4 14%	10 22%	67 17%	
Disagree strongly (1)	35 8%	31 8%	4 9%	* 1%	7 11%	9 10%	4 6%	4 8%	8 8%	1 4%	2 6%	3 6%	32 8%	
<b>NETS</b>														
Net: Agree	336 75%	301 75%	35 75%	12 69%	50 78%	65 71%	49 77%	39 81%	73 69%	23 85%	25 80%	34 72%	303 75%	
Net: Disagree	112 25%	100 25%	12 25%	5 31%	14 22%	26 29%	15 23%	9 19%	32 31%	4 15%	6 20%	13 28%	99 25%	
Mean score	3.1	3.1	3.0	3.2	3.1	3.0	3.2	3.1	2.9	3.2	3.2	3.1	3.1	
Standard deviation	.93	.93	.94	.92	.96	1.00	.93	.90	.92	.81	.91	.95	.93	
Standard error	.04	.06	.07	.22	.13	.10	.13	.12	.11	.12	.12	.14	.05	

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



## LCCI - Topical Q2 2019

**Q9b\_5. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

**There should not be any difference in the salary threshold for EU and non-EU migrants**

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	449	253	196	95	319	35	144	305	210	239	147	281	21
Weighted Total	448	229	219	61	357	30	80	368	171	277	135	290	23
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 174	93	82	18	148	9	28	146	66	108	42	123	8
	39%	40%	37%	29%	41%	30%	35%	40%	39%	39%	31%	43%	36%
					c							j	
Tend to agree	(3) 162	78	84	27	126	10	30	132	62	101	55	101	7
	36%	34%	38%	43%	35%	32%	37%	36%	36%	36%	41%	35%	29%
Tend to disagree	(2) 77	37	40	14	55	8	19	58	25	52	24	47	6
	17%	16%	18%	23%	15%	26%	23%	16%	14%	19%	18%	16%	27%
Disagree strongly	(1) 35	22	13	3	28	4	3	32	19	16	14	19	2
	8%	9%	6%	5%	8%	12%	4%	9%	11%	6%	11%	6%	8%
<b>NETS</b>													
Net: Agree	336	170	166	44	274	18	58	278	128	208	97	224	15
	75%	74%	76%	72%	77%	62%	73%	75%	75%	75%	72%	77%	65%
Net: Disagree	112	59	53	17	84	11	22	90	43	68	38	66	8
	25%	26%	24%	28%	23%	38%	27%	25%	25%	25%	28%	23%	35%
Mean score	3.1	3.1	3.1	3.0	3.1	2.8	3.0	3.1	3.0	3.1	2.9	3.1	2.9
												j	
Standard deviation	.93	.97	.89	.85	.94	1.02	.86	.95	.99	.90	.96	.91	.99
Standard error	.04	.06	.06	.09	.05	.17	.07	.05	.07	.06	.08	.05	.22

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

## LCCI - Topical Q2 2019

**Q9b\_6. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed Â£30,000 salary threshold for EU and non-EU migrants working in the UK?**

**London should have a lower salary threshold for migrants than the rest of the UK**

Base: All respondents excl. don't know

	BUSINESS SIZE			INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services	
	a	b	c	d	e	f	g	h	i	j	k	l		
Significance Level: 95%														
Unweighted Total	423	262	161	16	58	90	50	56	61	40	52	46	377	
Weighted Total	426	382	44	18	68	85	61	46	94	27	28	47	379	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Agree strongly (4)	62 15%	54 14%	8 18%	4 23%	10 15%	13 15%	11 18%	4 9%	12 12%	3 10%	6 22%	7 14%	56 15%	
Tend to agree (3)	49 11%	40 10%	9 20%	2 11%	6 9%	9 11%	11 18%	1 3%	14 15%	3 11%	2 9%	5 11%	44 11%	
			a				g		g					
Tend to disagree (2)	155 36%	142 37%	13 30%	6 35%	22 32%	32 38%	16 26%	21 45%	40 42%	9 33%	10 36%	16 33%	139 37%	
							f							
Disagree strongly (1)	160 38%	146 38%	14 32%	5 31%	30 45%	31 36%	24 39%	20 44%	29 30%	12 46%	9 33%	19 42%	141 37%	
<b>NETS</b>														
Net: Agree	111 26%	94 25%	17 38%	6 34%	16 23%	22 26%	22 35%	5 11%	26 27%	6 21%	9 31%	12 25%	99 26%	
			a			g	g		g		g			
Net: Disagree	315 74%	288 75%	27 62%	12 66%	52 77%	63 74%	39 65%	41 89%	69 73%	21 79%	19 69%	35 75%	280 74%	
			b				efhj							
Mean score	2.0	2.0	2.2	2.3	1.9	2.0	2.1	1.8	2.1	1.9	2.2	2.0	2.0	
			a								g			
Standard deviation	1.04	1.03	1.10	1.16	1.07	1.04	1.13	.88	.97	1.00	1.14	1.05	1.04	
Standard error	.05	.06	.09	.29	.14	.11	.16	.12	.12	.16	.16	.16	.05	

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

## LCCI - Topical Q2 2019

**Q9b\_6. The UK government's Immigration White Paper proposes that, in order to live and work in the UK after Brexit, migrants must be earning over Â£30,000. To what extent do you agree or disagree with the following statements about the proposed £30,000 salary threshold for EU and non-EU migrants working in the UK?**

### London should have a lower salary threshold for migrants than the rest of the UK

Base: All respondents excl. don't know

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	423	234	189	89	301	33	132	291	202	221	136	267	20
Weighted Total	426	215	211	57	339	30	77	349	168	258	127	277	21
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 62 15%	40 19% b	22 11%	11 20%	49 14%	2 7%	16 21%	46 13% g	25 15%	37 14%	17 13%	45 16%	1 3%
Tend to agree	(3) 49 11%	21 10%	27 13%	8 14%	36 11%	4 14%	10 13%	38 11%	26 16% i	23 9%	20 15%	25 9%	4 19%
Tend to disagree	(2) 155 36%	73 34%	82 39%	15 26%	134 40% ce	5 18%	24 31%	131 37%	62 37%	93 36%	48 38%	100 36%	7 32%
Disagree strongly	(1) 160 38%	81 38%	79 38%	23 39%	120 35%	18 60% cd	27 34%	134 38%	55 32%	106 41%	43 34%	107 39%	10 47%
<b>NETS</b>													
Net: Agree	111 26%	61 28%	50 24%	20 34%	85 25%	6 22%	26 34% g	84 24%	52 31%	59 23%	36 29%	70 25%	5 21%
Net: Disagree	315 74%	154 72%	161 76%	38 66%	254 75%	23 78%	51 66%	264 76% f	116 69%	199 77%	91 71%	207 75%	17 79%
Mean score	2.0	2.1	2.0	2.1 e	2.0	1.7	2.2 g	2.0	2.1	2.0	2.1	2.0	1.8
Standard deviation	1.04	1.10	.97	1.16	1.02	.99	1.13	1.01	1.04	1.03	1.01	1.06	.87
Standard error	.05	.07	.07	.12	.06	.17	.10	.06	.07	.07	.09	.06	.19

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

## LCCI - Topical Q2 2019

### Q10a. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	101	15	4	15	19	22	14	29	3	10	13	103
	23%	22%	29%	23%	21%	19%	33%	25%	24%	9%	26%	27%	23%
							ei	i	i		i		
Banks showing interest only when business is going well	108	91	17	4	16	27	24	13	14	3	8	12	96
	22%	20%	33%	21%	23%	26%	35%	23%	12%	11%	21%	24%	21%
			a			hi	hi						
Banks having little interest in SME firms	107	94	12	8	10	23	18	12	26	5	5	13	94
	21%	21%	24%	46%	15%	22%	26%	21%	21%	15%	14%	27%	21%
Interest rates are too high	89	75	13	4	11	27	11	5	24	3	4	13	76
	18%	17%	26%	25%	16%	26%	16%	9%	20%	10%	11%	27%	17%
			a			gij							
The process is too complex	85	73	11	5	14	19	12	11	19	2	3	14	71
	17%	16%	22%	30%	21%	18%	17%	18%	16%	6%	9%	28%	16%
					i							l	
Other	6	6	*	-	2	2	2	*	-	-	1	-	6
	1%	1%	1%	-	3%	1%	3%	1%	-	-	2%	-	1%
My business faces no barriers in attracting investment from banks	18	13	5	*	9	4	-	-	2	1	1	4	14
	4%	3%	9%	1%	13%	4%	-	-	2%	3%	3%	8%	3%
			a		efghj								
Don't know	16	12	4	*	1	8	3	1	2	-	1	*	15
	3%	3%	7%	2%	1%	8%	4%	1%	2%	-	2%	1%	3%
			a		i								

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

## LCCI - Topical Q2 2019

**Q10a. Which of the following, if any, are barriers to attracting financial investment into your business from banks?**

Base: All respondents

	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES		
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	313	190	18	60	110	54	68	75	47	71	49	454
Weighted Total	503	451	52	18	70	104	67	57	119	30	38	49	454
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not applicable, my business has not sought to attract financial investment from banks	238	229	10	5	31	36	24	30	69	21	21	16	223
	47%	51%	19%	30%	44%	34%	37%	52%	58%	72%	56%	32%	49%
		b					e		ef	defg	ef		k

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

## LCCI - Topical Q2 2019

### Q10a. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	503	282	221	101	362	40	158	345	236	267	159	322	22
Weighted Total	503	253	250	63	407	33	89	414	198	305	146	332	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	68	48	16	89	12	25	92	34	82	41	73	3
	23%	27%	19%	25%	22%	35%	27%	22%	17%	27%	28%	22%	11%
		b							h				
Banks showing interest only when business is going well	108	54	54	18	73	17	27	82	44	64	52	52	5
	22%	21%	22%	28%	18%	52%	30%	20%	22%	21%	36%	16%	19%
			d		cd		g			k			
Banks having little interest in SME firms	107	59	48	18	77	12	25	81	32	75	43	59	5
	21%	23%	19%	29%	19%	35%	28%	20%	16%	25%	30%	18%	20%
			d		d		g		h	k			
Interest rates are too high	89	41	48	20	60	9	27	62	39	50	43	41	5
	18%	16%	19%	31%	15%	27%	30%	15%	20%	16%	30%	12%	19%
			d				g			k			
The process is too complex	85	37	48	19	59	8	32	53	40	45	29	50	6
	17%	15%	19%	29%	14%	23%	35%	13%	20%	15%	20%	15%	25%
			d				g						
Other	6	4	2	-	3	3	-	6	-	6	2	3	2
	1%	1%	1%	-	1%	10%	-	1%	-	2%	1%	1%	7%
					cd				h				
My business faces no barriers in attracting investment from banks	18	9	8	1	16	*	1	17	8	10	1	15	2
	4%	4%	3%	2%	4%	1%	1%	4%	4%	3%	1%	4%	9%
											j		
Don't know	16	6	9	1	14	1	4	12	7	9	3	12	*
	3%	2%	4%	2%	3%	2%	4%	3%	4%	3%	2%	4%	1%
Not applicable, my business has not sought to attract financial investment from banks	238	118	120	16	215	7	20	218	89	150	50	180	8
	47%	47%	48%	26%	53%	22%	22%	53%	45%	49%	34%	54%	34%
			ce				f			j			

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

## LCCI - Topical Q2 2019

### Q10b. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents excl. no barriers and not applicable

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	279	140	139	13	33	70	37	44	36	15	31	35	244
Weighted Total	247	209	38	13	30	64	42	27	48	7	15	30	217
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	101	15	4	15	19	22	14	29	3	10	13	103
	47%	48%	40%	33%	50%	30%	52%	52%	60%	36%	65%	44%	47%
					e		e	e	e	e	e		
Banks showing interest only when business is going well	108	91	17	4	16	27	24	13	14	3	8	12	96
	44%	44%	45%	30%	53%	42%	55%	49%	29%	43%	51%	40%	44%
					h		h						
Banks having little interest in SME firms	107	94	12	8	10	23	18	12	26	5	5	13	94
	43%	45%	33%	66%	35%	36%	41%	44%	54%	61%	35%	44%	43%
		b											
Interest rates are too high	89	75	13	4	11	27	11	5	24	3	4	13	76
	36%	36%	36%	35%	37%	42%	25%	18%	50%	40%	26%	45%	35%
						g			fg				
The process is too complex	85	73	11	5	14	19	12	11	19	2	3	14	71
	34%	35%	30%	43%	49%	29%	27%	38%	39%	25%	22%	47%	33%
					j								
Other	6	6	*	-	2	2	2	*	-	-	1	-	6
	3%	3%	1%	-	6%	2%	4%	1%	-	-	4%	-	3%
Don't know	16	12	4	*	1	8	3	1	2	-	1	*	15
	6%	6%	9%	4%	2%	13%	6%	3%	4%	-	6%	2%	7%

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

## LCCI - Topical Q2 2019

### Q10b. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents excl. no barriers and not applicable

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	*e	f	g	h	i	j	k	*l	
Significance Level: 95%													
Unweighted Total	279	163	116	78	174	27	120	159	143	136	111	155	13
Weighted Total	247	126	121	45	176	26	68	179	102	145	95	137	14
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	68	48	16	89	12	25	92	34	82	41	73	3
	47%	54%	40%	35%	50%	45%	36%	51%	33%	57%	43%	53%	19%
		b		c			f		h				
Banks showing interest only when business is going well	108	54	54	18	73	17	27	82	44	64	52	52	5
	44%	43%	44%	39%	42%	67%	39%	46%	44%	44%	55%	38%	33%
										k			
Banks having little interest in SME firms	107	59	48	18	77	12	25	81	32	75	43	59	5
	43%	47%	40%	40%	44%	45%	37%	46%	31%	52%	45%	43%	34%
										h			
Interest rates are too high	89	41	48	20	60	9	27	62	39	50	43	41	5
	36%	32%	40%	44%	34%	34%	40%	35%	39%	34%	45%	30%	34%
											k		
The process is too complex	85	37	48	19	59	8	32	53	40	45	29	50	6
	34%	29%	40%	41%	33%	30%	46%	30%	39%	31%	30%	36%	43%
							g						
Other	6	4	2	-	3	3	-	6	-	6	2	3	2
	3%	3%	2%	-	2%	13%	-	3%	-	4%	2%	2%	13%
							f		h				
Don't know	16	6	9	1	14	1	4	12	7	9	3	12	*
	6%	5%	8%	2%	8%	2%	6%	7%	7%	6%	3%	9%	1%

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



## LCCI - Topical Q2 2019

### Q10c. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents excl. don't know

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	483	305	178	17	58	102	51	65	74	47	69	48	435
Weighted Total	487	439	49	18	69	96	64	57	117	30	37	49	439
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	101	15	4	15	19	22	14	29	3	10	13	103
	24%	23%	31%	24%	22%	20%	34%	25%	24%	9%	27%	27%	23%
							i	i	i		i		
Banks showing interest only when business is going well	108	91	17	4	16	27	24	13	14	3	8	12	96
	22%	21%	35%	21%	23%	28%	37%	24%	12%	11%	21%	25%	22%
			a			hi	hi						
Banks having little interest in SME firms	107	94	12	8	10	23	18	12	26	5	5	13	94
	22%	22%	25%	47%	15%	24%	27%	22%	22%	15%	15%	27%	21%
Interest rates are too high	89	75	13	4	11	27	11	5	24	3	4	13	76
	18%	17%	28%	25%	16%	28%	17%	9%	20%	10%	11%	27%	17%
			a			gij							
The process is too complex	85	73	11	5	14	19	12	11	19	2	3	14	71
	17%	17%	24%	31%	21%	20%	18%	19%	16%	6%	9%	29%	16%
					i	i						l	
Other	6	6	*	-	2	2	2	*	-	-	1	-	6
	1%	1%	1%	-	3%	2%	3%	1%	-	-	2%	-	1%
My business faces no barriers in attracting investment from banks	18	13	5	*	9	4	-	-	2	1	1	4	14
	4%	3%	10%	1%	13%	4%	-	-	2%	3%	4%	8%	3%
			a		efghj								
Not applicable, my business has not sought to attract financial investment from banks	238	229	10	5	31	36	24	30	69	21	21	16	223
	49%	52%	20%	31%	45%	37%	38%	53%	59%	72%	57%	32%	51%
		b					e	ef	defg	ef		k	

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

## LCCI - Topical Q2 2019

### Q10c. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents excl. don't know

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	483	270	213	98	348	37	149	334	226	257	156	306	21
Weighted Total	487	247	240	62	393	32	86	402	191	296	143	320	25
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	68	48	16	89	12	25	92	34	82	41	73	3
	24%	28%	20%	26%	23%	36%	29%	23%	18%	28%	29%	23%	11%
										h			
Banks showing interest only when business is going well	108	54	54	18	73	17	27	82	44	64	52	52	5
	22%	22%	22%	29%	19%	53%	31%	20%	23%	22%	36%	16%	19%
				d		cd	g				k		
Banks having little interest in SME firms	107	59	48	18	77	12	25	81	32	75	43	59	5
	22%	24%	20%	29%	20%	36%	30%	20%	17%	25%	30%	18%	20%
				d		d	g			h	k		
Interest rates are too high	89	41	48	20	60	9	27	62	39	50	43	41	5
	18%	17%	20%	32%	15%	27%	32%	15%	20%	17%	30%	13%	20%
				d			g				k		
The process is too complex	85	37	48	19	59	8	32	53	40	45	29	50	6
	17%	15%	20%	30%	15%	24%	37%	13%	21%	15%	20%	16%	25%
				d			g						
Other	6	4	2	-	3	3	-	6	-	6	2	3	2
	1%	2%	1%	-	1%	10%	-	2%	-	2%	1%	1%	7%
						cd				h			
My business faces no barriers in attracting investment from banks	18	9	8	1	16	*	1	17	8	10	1	15	2
	4%	4%	3%	2%	4%	1%	1%	4%	4%	3%	1%	5%	9%
												j	
Not applicable, my business has not sought to attract financial investment from banks	238	118	120	16	215	7	20	218	89	150	50	180	8
	49%	48%	50%	26%	55%	22%	23%	54%	46%	51%	35%	56%	34%
					ce			f				j	

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

## LCCI - Topical Q2 2019

### Q10d. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents excl. not applicable

	BUSINESS SIZE		INDUSTRY									MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	304	149	155	14	41	80	37	44	38	16	34	38	266
Weighted Total	265	222	43	13	39	69	42	27	50	8	17	33	231
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	101	15	4	15	19	22	14	29	3	10	13	103
	44%	46%	35%	33%	39%	28%	52%	52%	57%	32%	60%	39%	45%
Banks showing interest only when business is going well	108	91	17	4	16	27	24	13	14	3	8	12	96
	41%	41%	40%	29%	40%	39%	55%	49%	28%	38%	47%	36%	42%
Banks having little interest in SME firms	107	94	12	8	10	23	18	12	26	5	5	13	94
	40%	43%	29%	65%	27%	34%	41%	44%	51%	54%	32%	39%	41%
Interest rates are too high	89	75	13	4	11	27	11	5	24	3	4	13	76
	34%	34%	32%	35%	28%	40%	25%	18%	47%	36%	24%	40%	33%
The process is too complex	85	73	11	5	14	19	12	11	19	2	3	14	71
	32%	33%	27%	43%	37%	28%	27%	38%	38%	22%	20%	42%	31%
Other	6	6	*	-	2	2	2	*	-	-	1	-	6
	2%	3%	1%	-	5%	2%	4%	1%	-	-	4%	-	3%
My business faces no barriers in attracting investment from banks	18	13	5	*	9	4	-	-	2	1	1	4	14
	7%	6%	11%	1%	24%	6%	-	-	5%	11%	8%	11%	6%
Don't know	16	12	4	*	1	8	3	1	2	-	1	*	15
	6%	5%	8%	3%	2%	12%	6%	3%	4%	-	5%	1%	7%

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

## LCCI - Topical Q2 2019

### Q10d. Which of the following, if any, are barriers to attracting financial investment into your business from banks?

Base: All respondents excl. not applicable

	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
	a	b	c	d	*e	f	g	h	i	j	k	*l	
Significance Level: 95%													
Unweighted Total	304	179	125	83	192	29	127	177	157	147	115	174	15
Weighted Total	265	135	129	47	192	26	70	195	110	155	96	152	17
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Banks being too risk averse	116	68	48	16	89	12	25	92	34	82	41	73	3
	44%	50%	37%	34%	46%	45%	35%	47%	31%	53%	42%	48%	16%
		b					f		h				
Banks showing interest only when business is going well	108	54	54	18	73	17	27	82	44	64	52	52	5
	41%	40%	42%	38%	38%	66%	38%	42%	40%	41%	54%	34%	29%
										k			
Banks having little interest in SME firms	107	59	48	18	77	12	25	81	32	75	43	59	5
	40%	43%	37%	39%	40%	45%	37%	42%	29%	48%	45%	39%	30%
										h			
Interest rates are too high	89	41	48	20	60	9	27	62	39	50	43	41	5
	34%	30%	37%	42%	31%	34%	39%	32%	36%	32%	45%	27%	29%
										k			
The process is too complex	85	37	48	19	59	8	32	53	40	45	29	50	6
	32%	27%	37%	39%	31%	30%	46%	27%	36%	29%	30%	33%	37%
							g						
Other	6	4	2	-	3	3	-	6	-	6	2	3	2
	2%	3%	2%	-	1%	13%	-	3%	-	4%	2%	2%	11%
							f		h				
My business faces no barriers in attracting investment from banks	18	9	8	1	16	*	1	17	8	10	1	15	2
	7%	7%	6%	3%	8%	1%	2%	8%	7%	6%	1%	10%	13%
							f				j		
Don't know	16	6	9	1	14	1	4	12	7	9	3	12	*
	6%	5%	7%	2%	7%	2%	6%	6%	7%	6%	3%	8%	1%

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