

LCCI – QES Q1 2015

METHODOLOGY NOTE

ComRes interviewed 503 London business decision makers online between 29th January and 16th February 2015. 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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To register for Pollwatch, a monthly newsletter update on the polls, please email: pollwatch@comres.co.uk

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<p>1. Below is a list of some of the key issues facing London today. Please rank the issues below in order of how much they negatively impact on your business. Please rank those that negatively impact on your business where 1 = the highest impact, 2 = the second highest impact and so on. If an issue does not have any negative impact on your business, please do not rank it. Summary table</p> <p>Base: All respondents</p>	1
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<p>2. In the last twelve months how much impact, if any, do you believe that problems such as delays, cancellations and overcrowding on commuter train services into London (including National Rail services, but excluding the Underground and Overground) have had on your business?</p> <p>Base: All respondents</p>	20
<p>3. In the last twelve months, how often, if at all, has your business been affected by each of the following issues? Summary table</p> <p>Base: All respondents</p>	22
<p>3. 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</p> <p>Base: All respondents</p>	23
<p>3. 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</p> <p>Base: All respondents</p>	25
<p>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</p> <p>Base: All respondents</p>	27
<p>3. 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</p>	29

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Base: All respondents

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Summary table

Base: All respondents

	Total								Net		Mean score
		Highest impact 1	2	3	4	5	6	Lowest impact 7	No impact	Top three	
Lack of housing that people can afford	503 100%	125 25%	71 14%	59 12%	40 8%	33 7%	32 6%	24 5%	119 24%	255 51%	2.95
Lack of sufficiently skilled workers	503 100%	84 17%	57 11%	69 14%	60 12%	52 10%	31 6%	28 6%	122 24%	211 42%	3.38
The current business rates system	503 100%	78 16%	82 16%	54 11%	59 12%	45 9%	39 8%	18 4%	129 26%	213 42%	3.27
Lack of London airport capacity	503 100%	28 6%	23 5%	28 6%	39 8%	43 8%	68 14%	131 26%	143 28%	79 16%	5.15
Lack of capacity on London's tube and bus services	503 100%	40 8%	56 11%	86 17%	73 15%	70 14%	36 7%	29 6%	112 22%	182 36%	3.77
Poor reliability and punctuality of commuter train services into London	503 100%	56 11%	82 16%	62 12%	61 12%	58 12%	51 10%	15 3%	118 23%	200 40%	3.51
Business crime in London (e.g. fraud and economic crimes)	503 100%	33 7%	51 10%	44 9%	59 12%	63 13%	72 14%	51 10%	130 26%	128 25%	4.31

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Highest impact

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of housing that people can afford	125	108	16	10	114	2	21	29	21	11	19	9	12	11
	25%	24%	29%	16%	26%	11%	30%	27%	32%	20%	17%	30%	30%	17%
Lack of sufficiently skilled workers	84	67	17	19	65	4	18	10	12	8	21	3	7	6
	17%	15%	31%	30%	15%	20%	26%	9%	19%	15%	18%	11%	19%	9%
The current business rates system	78	70	8	5	73	5	3	31	8	7	17	3	5	28
	16%	16%	14%	8%	17%	24%	4%	28%	12%	12%	15%	11%	12%	43%
Poor reliability and punctuality of commuter train services into London	56	52	4	4	52	-	5	4	6	12	13	10	5	4
	11%	12%	7%	6%	12%	-	8%	3%	9%	23%	11%	34%	14%	6%
Lack of capacity on London's tube and bus services	40	37	3	-	40	-	2	8	7	5	13	*	5	1
	8%	8%	6%	-	9%	-	3%	7%	11%	9%	11%	2%	13%	2%
Business crime in London (e.g. fraud and economic crimes)	33	31	3	4	29	4	2	10	2	3	8	1	3	5
	7%	7%	5%	7%	7%	22%	3%	9%	3%	6%	7%	5%	7%	7%
Lack of London airport capacity	28	27	1	17	12	4	13	4	-	4	3	-	-	3
	6%	6%	3%	26%	3%	22%	18%	4%	-	7%	3%	-	-	4%
Not Stated	58	56	3	4	54	-	5	13	10	4	22	2	3	8
	12%	12%	5%	6%	12%	-	7%	12%	15%	7%	18%	8%	7%	12%

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Highest impact

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU/ EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of housing that people can afford	125	70	55	19	100	6	19	105	49	76	34	80	10	115	42	13
	25%	30%	21%	29%	24%	24%	28%	24%	28%	23%	29%	22%	42%	24%	30%	17%
Lack of sufficiently skilled workers	84	37	48	16	63	6	24	60	39	46	23	59	2	82	38	10
	17%	16%	18%	24%	15%	22%	36%	14%	22%	14%	20%	16%	9%	17%	27%	13%
The current business rates system	78	27	51	9	63	6	12	66	22	56	17	57	3	77	20	15
	16%	11%	19%	14%	15%	23%	17%	15%	13%	17%	15%	16%	14%	16%	14%	19%
Poor reliability and punctuality of commuter train services into London	56	24	32	10	44	1	3	52	16	39	16	38	1	56	13	11
	11%	10%	12%	16%	11%	5%	5%	12%	9%	12%	14%	10%	6%	12%	9%	14%
Lack of capacity on London's tube and bus services	40	23	17	2	37	1	4	36	15	25	3	34	3	37	6	9
	8%	10%	6%	3%	9%	2%	6%	8%	9%	8%	3%	9%	11%	8%	4%	11%
Business crime in London (e.g. fraud and economic crimes)	33	16	16	3	30	1	1	32	15	18	6	26	1	33	4	6
	7%	7%	6%	5%	7%	3%	2%	7%	9%	5%	5%	7%	6%	7%	3%	8%
Lack of London airport capacity	28	10	18	3	24	1	1	27	4	24	5	22	1	28	5	4
	6%	4%	7%	5%	6%	6%	1%	6%	2%	7%	4%	6%	5%	6%	3%	5%
Not Stated	58	30	29	3	51	4	3	55	13	46	12	45	2	54	14	10
	12%	13%	11%	5%	12%	16%	5%	13%	7%	14%	10%	12%	8%	11%	10%	13%

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2nd highest impact

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Poor reliability and punctuality of commuter train services into London	82	68	14	3	78	*	6	15	16	7	24	2	11	4
	16%	15%	25%	5%	18%	2%	9%	14%	25%	12%	20%	8%	28%	6%
The current business rates system	82	73	9	16	66	8	14	17	10	8	16	5	5	8
	16%	16%	16%	25%	15%	40%	19%	16%	15%	14%	13%	18%	12%	13%
Lack of housing that people can afford	71	63	8	17	54	3	18	16	7	5	11	3	8	8
	14%	14%	14%	27%	12%	13%	25%	15%	11%	10%	9%	10%	21%	12%
Lack of sufficiently skilled workers	57	51	6	9	49	9	1	13	7	9	12	5	2	10
	11%	11%	12%	14%	11%	44%	1%	12%	11%	16%	10%	16%	5%	15%
Lack of capacity on London's tube and bus services	56	46	11	6	50	-	11	11	3	8	11	6	5	11
	11%	10%	19%	9%	11%	-	17%	11%	5%	15%	9%	20%	12%	18%
Business crime in London (e.g. fraud and economic crimes)	51	48	3	8	43	-	10	8	6	8	13	2	4	6
	10%	11%	5%	13%	10%	-	15%	8%	9%	14%	11%	7%	10%	9%
Lack of London airport capacity	23	22	2	-	23	-	2	7	2	2	6	4	2	4
	5%	5%	3%	-	5%	-	3%	7%	3%	3%	5%	12%	4%	6%
Not Stated	81	77	4	4	77	-	8	20	13	8	26	3	3	14
	16%	17%	7%	6%	17%	-	11%	18%	20%	14%	22%	10%	8%	22%

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2nd highest impact

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Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Poor reliability and punctuality of commuter train services into London	82	45	36	10	64	8	18	63	36	46	13	64	5	79	25	10
	16%	19%	14%	16%	16%	29%	27%	15%	21%	14%	11%	18%	20%	16%	18%	13%
The current business rates system	82	38	44	14	65	3	14	68	25	56	16	57	9	76	31	12
	16%	16%	16%	21%	16%	12%	20%	16%	15%	17%	13%	16%	36%	16%	22%	15%
Lack of housing that people can afford	71	23	48	12	59	1	9	62	23	48	20	49	1	68	24	8
	14%	10%	18%	18%	14%	2%	13%	14%	13%	14%	17%	14%	6%	14%	17%	10%
Lack of sufficiently skilled workers	57	28	29	9	45	4	6	51	21	36	15	37	5	57	15	10
	11%	12%	11%	14%	11%	15%	9%	12%	12%	11%	13%	10%	21%	12%	11%	13%
Lack of capacity on London's tube and bus services	56	27	28	9	44	3	5	51	21	35	21	34	1	56	15	11
	11%	11%	10%	14%	11%	11%	8%	12%	12%	11%	18%	9%	3%	12%	11%	13%
Business crime in London (e.g. fraud and economic crimes)	51	27	24	6	41	3	9	42	20	31	12	38	1	48	9	11
	10%	11%	9%	10%	10%	13%	14%	10%	12%	9%	10%	11%	3%	10%	6%	14%
Lack of London airport capacity	23	7	16	1	22	-	2	21	9	14	2	21	-	23	6	5
	5%	3%	6%	2%	5%	-	3%	5%	5%	4%	2%	6%	-	5%	4%	6%
Not Stated	81	41	40	3	73	5	4	77	17	64	18	60	2	74	17	12
	16%	17%	15%	5%	18%	18%	6%	18%	10%	19%	16%	17%	10%	15%	12%	15%

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3rd highest impact

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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of capacity on London's tube and bus services	86	78	8	5	81	2	9	16	9	10	25	3	12	8
	17%	17%	15%	8%	18%	11%	13%	15%	14%	18%	21%	10%	30%	12%
Lack of sufficiently skilled workers	69	62	7	17	52	3	19	14	11	6	5	5	6	5
	14%	14%	12%	27%	12%	13%	27%	13%	17%	12%	4%	18%	14%	8%
Poor reliability and punctuality of commuter train services into London	62	53	9	8	54	2	9	8	8	8	13	7	7	5
	12%	12%	17%	13%	12%	11%	14%	7%	13%	14%	11%	24%	18%	8%
Lack of housing that people can afford	59	53	6	14	46	5	9	16	5	6	14	1	3	14
	12%	12%	11%	21%	10%	27%	13%	15%	8%	11%	12%	5%	7%	22%
The current business rates system	54	42	11	8	45	4	6	10	8	7	9	6	4	3
	11%	9%	21%	13%	10%	22%	9%	9%	12%	12%	8%	19%	10%	4%
Business crime in London (e.g. fraud and economic crimes)	44	38	5	2	41	2	3	15	3	6	9	3	2	10
	9%	8%	10%	3%	9%	11%	4%	14%	5%	11%	8%	10%	6%	15%
Lack of London airport capacity	28	25	3	1	27	1	1	6	5	4	9	*	1	3
	6%	6%	5%	1%	6%	4%	1%	6%	8%	8%	8%	2%	3%	4%
Not Stated	102	97	5	8	94	-	14	23	15	9	33	4	5	17
	20%	22%	9%	13%	21%	-	20%	21%	23%	16%	28%	13%	12%	27%

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3rd highest impact

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Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of capacity on London's tube and bus services	86	45	41	8	75	2	11	75	40	46	17	61	8	80	35	14
	17%	19%	15%	13%	18%	9%	16%	17%	23%	14%	15%	17%	33%	17%	25%	18%
Lack of sufficiently skilled workers	69	29	40	14	52	3	10	59	19	50	15	51	2	67	18	9
	14%	12%	15%	22%	13%	11%	15%	13%	11%	15%	13%	14%	10%	14%	12%	11%
Poor reliability and punctuality of commuter train services into London	62	30	32	9	49	5	11	51	28	34	13	46	3	62	19	15
	12%	13%	12%	13%	12%	17%	16%	12%	16%	10%	11%	13%	13%	13%	14%	20%
Lack of housing that people can afford	59	22	37	12	42	5	15	44	15	44	16	40	3	59	16	10
	12%	9%	14%	19%	10%	18%	22%	10%	9%	13%	14%	11%	12%	12%	11%	12%
The current business rates system	54	29	24	10	40	3	10	43	29	25	18	34	2	54	17	10
	11%	12%	9%	16%	10%	10%	15%	10%	17%	7%	15%	9%	8%	11%	12%	12%
Business crime in London (e.g. fraud and economic crimes)	44	16	28	5	38	1	4	40	13	31	7	35	2	44	10	4
	9%	7%	10%	7%	9%	3%	6%	9%	8%	9%	6%	10%	8%	9%	7%	6%
Lack of London airport capacity	28	17	11	3	23	3	2	25	7	21	7	20	1	24	8	3
	6%	7%	4%	4%	5%	10%	3%	6%	4%	6%	6%	5%	6%	5%	6%	4%
Not Stated	102	49	52	3	93	6	4	98	23	79	24	75	2	93	18	13
	20%	21%	20%	5%	23%	22%	6%	23%	13%	24%	21%	21%	10%	19%	13%	17%

QES Q1 2015

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4th highest impact

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of capacity on London's tube and bus services	73	66	7	10	64	10	3	14	14	8	11	8	5	6
	15%	15%	13%	15%	15%	49%	4%	13%	22%	14%	9%	29%	13%	9%
Poor reliability and punctuality of commuter train services into London	61	55	6	6	55	*	12	22	5	8	9	3	2	13
	12%	12%	12%	10%	12%	2%	18%	20%	8%	14%	8%	9%	5%	21%
Lack of sufficiently skilled workers	60	52	8	2	58	-	4	7	8	5	22	6	7	5
	12%	12%	14%	3%	13%	-	6%	7%	12%	9%	19%	22%	17%	7%
Business crime in London (e.g. fraud and economic crimes)	59	53	6	15	44	7	12	13	7	3	9	3	5	8
	12%	12%	11%	24%	10%	36%	17%	12%	11%	5%	7%	10%	14%	12%
The current business rates system	59	52	6	10	49	-	11	13	8	7	10	3	6	8
	12%	12%	12%	15%	11%	-	16%	12%	13%	12%	8%	12%	15%	12%
Lack of housing that people can afford	40	35	5	5	36	*	6	10	2	10	10	*	2	5
	8%	8%	10%	7%	8%	2%	9%	9%	3%	17%	9%	1%	5%	8%
Lack of London airport capacity	39	29	10	8	31	2	8	4	5	5	8	1	6	2
	8%	6%	18%	12%	7%	11%	11%	3%	8%	10%	7%	2%	15%	3%
Not Stated	112	107	6	8	104	-	14	24	15	10	38	5	6	19
	22%	24%	11%	13%	24%	-	20%	23%	23%	18%	32%	16%	16%	29%

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4th highest impact

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU / EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of capacity on London's tube and bus services	73 15%	38 16%	35 13%	12 19%	59 14%	3 10%	15 22%	58 13%	20 12%	53 16%	19 16%	54 15%	1 3%	70 15%	17 12%	10 13%
Poor reliability and punctuality of commuter train services into London	61 12%	27 11%	34 13%	16 25%	40 10%	6 22%	14 20%	47 11%	30 17%	31 9%	17 14%	43 12%	1 6%	58 12%	28 20%	11 14%
Lack of sufficiently skilled workers	60 12%	33 14%	26 10%	10 15%	47 11%	3 12%	8 12%	51 12%	21 12%	38 12%	9 8%	49 13%	2 9%	60 12%	17 12%	12 15%
Business crime in London (e.g. fraud and economic crimes)	59 12%	22 9%	37 14%	6 9%	51 12%	2 9%	9 13%	50 12%	20 12%	39 12%	13 11%	36 10%	10 39%	59 12%	20 14%	10 12%
The current business rates system	59 12%	23 10%	36 13%	9 14%	48 12%	2 6%	8 11%	51 12%	21 12%	37 11%	12 11%	42 12%	4 16%	55 12%	15 10%	11 15%
Lack of housing that people can afford	40 8%	15 6%	25 9%	3 5%	35 9%	2 7%	4 6%	36 8%	16 9%	24 7%	8 7%	32 9%	* 1%	39 8%	7 5%	6 8%
Lack of London airport capacity	39 8%	26 11%	12 5%	4 6%	31 8%	3 13%	4 5%	35 8%	16 9%	22 7%	10 9%	25 7%	3 13%	37 8%	15 11%	5 7%
Not Stated	112 22%	52 22%	59 22%	5 7%	102 25%	6 22%	7 10%	105 24%	28 16%	85 26%	29 25%	81 22%	3 12%	103 21%	22 16%	13 17%

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5th highest impact

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of capacity on London's tube and bus services	70	62	8	11	59	3	9	15	11	10	13	6	4	7
	14%	14%	14%	17%	14%	13%	14%	14%	17%	19%	11%	19%	10%	11%
Business crime in London (e.g. fraud and economic crimes)	63	49	14	8	55	*	12	9	12	6	13	6	5	7
	13%	11%	25%	13%	12%	2%	17%	8%	19%	11%	11%	22%	11%	10%
Poor reliability and punctuality of commuter train services into London	58	53	5	8	51	4	6	12	5	6	18	2	5	9
	12%	12%	9%	12%	12%	19%	9%	11%	8%	12%	15%	7%	12%	14%
Lack of sufficiently skilled workers	52	48	4	6	45	2	7	16	2	5	13	1	5	8
	10%	11%	7%	10%	10%	11%	10%	15%	3%	9%	11%	3%	12%	12%
The current business rates system	45	39	6	4	41	-	6	11	7	7	5	2	8	4
	9%	9%	11%	6%	9%	-	9%	10%	11%	12%	4%	5%	19%	6%
Lack of London airport capacity	43	36	6	4	38	4	4	13	2	6	7	3	5	8
	8%	8%	11%	7%	9%	22%	6%	12%	3%	10%	6%	9%	13%	12%
Lack of housing that people can afford	33	28	6	9	24	6	4	2	6	4	6	3	2	2
	7%	6%	10%	15%	5%	33%	6%	2%	9%	7%	5%	9%	5%	4%
Not Stated	139	132	7	12	126	-	20	31	20	11	42	8	7	21
	28%	29%	13%	19%	29%	-	29%	28%	31%	20%	36%	26%	17%	33%

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5th highest impact

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU / EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of capacity on London's tube and bus services	70	27	43	15	51	4	19	52	27	44	19	45	7	69	35	16
	14%	11%	16%	23%	12%	14%	27%	12%	15%	13%	16%	12%	27%	14%	25%	20%
Business crime in London (e.g. fraud and economic crimes)	63	33	30	11	44	7	12	51	25	38	17	44	2	61	16	8
	13%	14%	11%	18%	11%	27%	17%	12%	15%	11%	15%	12%	9%	13%	11%	10%
Poor reliability and punctuality of commuter train services into London	58	25	33	5	53	*	6	52	20	39	11	45	3	58	16	5
	12%	10%	13%	7%	13%	1%	9%	12%	11%	12%	9%	12%	12%	12%	11%	7%
Lack of sufficiently skilled workers	52	23	28	6	43	2	4	48	22	29	13	34	4	44	17	8
	10%	10%	11%	9%	11%	8%	6%	11%	13%	9%	11%	10%	19%	9%	12%	10%
The current business rates system	45	21	24	5	38	3	7	38	19	26	7	38	-	44	10	5
	9%	9%	9%	8%	9%	10%	11%	9%	11%	8%	6%	10%	-	9%	7%	6%
Lack of London airport capacity	43	22	21	4	36	3	3	39	11	31	5	35	3	43	13	12
	8%	9%	8%	6%	9%	13%	5%	9%	6%	10%	4%	10%	12%	9%	9%	16%
Lack of housing that people can afford	33	19	15	3	29	1	4	29	12	21	5	28	1	33	7	7
	7%	8%	6%	5%	7%	5%	6%	7%	7%	6%	4%	8%	3%	7%	5%	10%
Not Stated	139	67	70	16	117	6	13	125	37	101	41	93	4	130	28	16
	28%	28%	27%	24%	28%	22%	20%	29%	22%	31%	35%	26%	17%	27%	20%	21%

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6th highest impact

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business crime in London (e.g. fraud and economic crimes)	72	63	9	9	64	1	11	12	11	9	16	5	6	4
	14%	14%	16%	14%	14%	8%	16%	12%	16%	17%	14%	18%	15%	7%
Lack of London airport capacity	68	60	8	8	60	2	9	17	9	6	15	3	7	13
	14%	13%	15%	13%	14%	11%	13%	16%	14%	10%	13%	11%	17%	19%
Poor reliability and punctuality of commuter train services into London	51	44	7	17	34	6	11	12	7	6	4	1	3	7
	10%	10%	12%	26%	8%	33%	15%	11%	11%	10%	4%	2%	9%	11%
The current business rates system	39	34	5	5	34	*	7	3	2	5	15	3	3	1
	8%	8%	9%	7%	8%	2%	10%	3%	3%	9%	13%	12%	7%	2%
Lack of capacity on London's tube and bus services	36	32	3	2	34	2	1	11	5	3	10	*	3	9
	7%	7%	6%	3%	8%	11%	1%	11%	8%	5%	9%	1%	7%	14%
Lack of housing that people can afford	32	26	6	4	28	3	3	5	4	6	6	3	3	1
	6%	6%	11%	7%	6%	13%	5%	4%	6%	10%	5%	10%	9%	2%
Lack of sufficiently skilled workers	31	26	5	-	31	-	2	7	5	6	3	3	4	2
	6%	6%	9%	-	7%	-	4%	7%	8%	11%	3%	10%	10%	4%
Not Stated	174	162	13	19	156	4	25	39	22	16	47	10	10	27
	35%	36%	23%	29%	35%	22%	37%	37%	34%	28%	40%	35%	26%	41%

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6th highest impact

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU / EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business crime in London (e.g. fraud and economic crimes)	72	39	33	9	59	4	12	60	30	42	18	53	*	66	35	14
	14%	16%	13%	14%	14%	17%	18%	14%	18%	13%	16%	15%	1%	14%	25%	18%
Lack of London airport capacity	68	26	42	11	55	1	13	55	26	42	13	48	7	65	22	8
	14%	11%	16%	18%	13%	6%	19%	13%	15%	13%	11%	13%	28%	14%	16%	11%
Poor reliability and punctuality of commuter train services into London	51	22	29	7	43	1	6	45	11	40	6	41	4	49	9	7
	10%	9%	11%	11%	10%	3%	8%	10%	6%	12%	5%	11%	15%	10%	6%	10%
The current business rates system	39	21	17	3	35	1	6	33	16	23	6	31	2	37	12	5
	8%	9%	7%	5%	8%	3%	9%	8%	9%	7%	6%	9%	6%	8%	9%	6%
Lack of capacity on London's tube and bus services	36	14	22	5	25	6	3	33	14	22	6	27	3	35	9	6
	7%	6%	8%	7%	6%	25%	4%	8%	8%	7%	5%	8%	10%	7%	7%	8%
Lack of housing that people can afford	32	20	12	7	21	4	6	27	16	16	11	21	-	32	11	5
	6%	9%	5%	10%	5%	16%	8%	6%	9%	5%	9%	6%	-	7%	7%	6%
Lack of sufficiently skilled workers	31	13	18	1	29	1	5	26	11	20	7	21	3	31	7	7
	6%	5%	7%	2%	7%	3%	8%	6%	6%	6%	6%	6%	14%	6%	5%	9%
Not Stated	174	82	91	22	145	7	18	156	49	125	49	119	6	165	35	26
	35%	35%	34%	33%	35%	28%	27%	36%	28%	38%	42%	33%	25%	34%	25%	33%

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7th highest impact

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of London airport capacity	131	114	18	13	118	6	12	26	22	17	25	12	11	14
	26%	25%	32%	21%	27%	30%	18%	24%	34%	31%	21%	41%	29%	22%
Business crime in London (e.g. fraud and economic crimes)	51	43	8	6	45	2	6	9	5	6	11	3	8	7
	10%	10%	14%	10%	10%	11%	9%	8%	8%	11%	10%	9%	20%	11%
Lack of capacity on London's tube and bus services	29	25	4	17	12	3	14	5	2	1	2	2	1	2
	6%	6%	8%	27%	3%	13%	21%	5%	3%	1%	2%	7%	1%	2%
Lack of sufficiently skilled workers	28	25	3	-	28	-	3	10	2	4	6	-	3	6
	6%	6%	6%	-	6%	-	5%	10%	3%	8%	5%	-	7%	9%
Lack of housing that people can afford	24	23	1	-	24	-	*	6	3	4	9	*	2	4
	5%	5%	2%	-	5%	-	*	5%	5%	7%	7%	1%	5%	6%
The current business rates system	18	17	1	-	18	-	3	1	4	3	4	*	2	1
	4%	4%	2%	-	4%	-	4%	1%	6%	5%	4%	2%	6%	2%
Poor reliability and punctuality of commuter train services into London	15	14	2	2	13	2	1	6	*	1	4	*	1	1
	3%	3%	3%	3%	3%	11%	1%	5%	1%	2%	4%	2%	1%	2%
Not Stated	207	188	19	25	182	7	29	45	27	20	56	11	12	30
	41%	42%	34%	39%	41%	35%	42%	42%	42%	36%	48%	38%	31%	46%

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Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
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Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of London airport capacity	131	60	71	21	101	8	28	103	60	71	37	90	4	126	45	23
	26%	25%	27%	33%	25%	32%	41%	24%	35%	22%	32%	25%	17%	26%	32%	29%
Business crime in London (e.g. fraud and economic crimes)	51	22	29	7	43	1	6	45	15	36	9	41	1	48	19	8
	10%	9%	11%	12%	10%	4%	8%	10%	9%	11%	7%	11%	5%	10%	14%	10%
Lack of capacity on London's tube and bus services	29	10	19	3	25	1	3	26	8	21	3	26	1	29	2	-
	6%	4%	7%	4%	6%	3%	4%	6%	5%	6%	2%	7%	2%	6%	1%	-
Lack of sufficiently skilled workers	28	15	13	3	24	2	5	23	10	18	5	21	2	28	8	6
	6%	6%	5%	4%	6%	7%	7%	5%	6%	6%	5%	6%	7%	6%	5%	7%
Lack of housing that people can afford	24	11	13	2	20	2	1	23	10	14	4	17	3	24	8	7
	5%	5%	5%	3%	5%	8%	1%	5%	6%	4%	3%	5%	14%	5%	6%	9%
The current business rates system	18	13	5	3	12	3	2	16	7	11	2	16	-	18	7	3
	4%	5%	2%	5%	3%	10%	3%	4%	4%	3%	2%	4%	-	4%	5%	4%
Poor reliability and punctuality of commuter train services into London	15	9	7	1	14	-	2	13	5	10	5	8	2	11	10	4
	3%	4%	3%	2%	3%	-	3%	3%	3%	3%	4%	2%	9%	2%	7%	5%
Not Stated	207	96	109	24	173	10	23	184	59	148	53	143	11	198	42	28
	41%	41%	41%	37%	42%	37%	33%	42%	34%	45%	45%	39%	47%	41%	30%	36%

QES Q1 2015

1. Below is a list of some of the key issues facing London today.

Please rank the issues below in order of how much they negatively impact on your business. Please rank those that negatively impact on your business where 1 = the highest impact, 2 = the second highest impact and so on. If an issue does not have any negative impact on your business, please do not rank it.

No impact

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of London airport capacity	143	136	7	12	131	-	21	31	20	11	45	7	8	20
	28%	30%	13%	19%	30%	-	30%	29%	31%	21%	38%	23%	19%	30%
Business crime in London (e.g. fraud and economic crimes)	130	122	8	10	120	2	14	31	18	14	38	6	7	19
	26%	27%	14%	16%	27%	11%	20%	29%	28%	26%	32%	19%	17%	29%
The current business rates system	129	120	10	16	113	2	19	23	18	13	40	6	7	11
	26%	27%	17%	25%	26%	11%	28%	21%	28%	23%	34%	21%	19%	18%
Lack of sufficiently skilled workers	122	117	5	10	111	2	15	30	18	11	33	6	7	24
	24%	26%	10%	16%	25%	11%	21%	28%	28%	20%	29%	20%	17%	37%
Lack of housing that people can afford	119	112	7	4	115	-	8	24	17	10	42	10	7	20
	24%	25%	13%	6%	26%	-	12%	23%	26%	18%	36%	33%	18%	30%
Poor reliability and punctuality of commuter train services into London	118	110	8	14	103	4	19	29	17	8	32	5	5	21
	23%	24%	15%	23%	23%	22%	27%	27%	26%	14%	27%	16%	13%	33%
Lack of capacity on London's tube and bus services	112	102	10	13	100	*	19	27	14	10	33	4	6	21
	22%	23%	18%	20%	23%	2%	28%	25%	21%	18%	28%	13%	14%	32%
Not Stated	296	260	36	39	258	13	40	63	38	36	61	18	28	35
	59%	58%	66%	61%	59%	65%	58%	58%	58%	64%	52%	62%	69%	54%

QES Q1 2015

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No impact

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU/ EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of London airport capacity	143	69	73	17	120	6	15	128	40	103	38	101	4	134	28	17
	28%	29%	28%	26%	29%	22%	22%	29%	23%	31%	32%	28%	19%	28%	20%	22%
Business crime in London (e.g. fraud and economic crimes)	130	63	68	17	106	6	16	115	34	96	35	88	7	123	27	17
	26%	26%	26%	27%	26%	24%	23%	26%	20%	29%	30%	24%	28%	25%	19%	22%
The current business rates system	129	63	64	12	111	7	10	119	34	96	38	86	5	121	29	17
	26%	27%	24%	18%	27%	26%	14%	27%	19%	29%	33%	24%	19%	25%	20%	22%
Lack of sufficiently skilled workers	122	58	62	6	110	6	5	117	30	92	31	88	3	113	22	17
	24%	25%	23%	10%	27%	22%	7%	27%	17%	28%	26%	24%	12%	23%	15%	21%
Lack of housing that people can afford	119	56	61	7	106	5	11	108	32	87	19	94	5	112	26	22
	24%	24%	23%	11%	26%	20%	15%	25%	18%	26%	17%	26%	22%	23%	19%	29%
Poor reliability and punctuality of commuter train services into London	118	56	61	7	105	6	7	110	27	91	36	77	5	109	21	14
	23%	23%	23%	10%	25%	24%	11%	25%	16%	28%	30%	21%	20%	23%	15%	18%
Lack of capacity on London's tube and bus services	112	52	60	11	95	7	9	103	28	84	30	80	2	106	23	13
	22%	22%	23%	16%	23%	27%	14%	24%	16%	26%	25%	22%	9%	22%	16%	17%
Not Stated	296	141	156	41	239	16	46	251	114	182	64	219	13	284	99	50
	59%	59%	59%	63%	58%	63%	67%	58%	66%	55%	55%	61%	53%	59%	70%	64%

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Top three

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of housing that people can afford	255	225	30	41	214	10	48	61	34	22	44	13	23	33
	51%	50%	55%	64%	49%	52%	69%	56%	52%	40%	38%	45%	57%	51%
The current business rates system	213	186	28	29	184	17	23	57	25	21	42	14	13	39
	42%	41%	50%	46%	42%	87%	33%	53%	39%	39%	36%	48%	34%	60%
Lack of sufficiently skilled workers	211	180	30	45	166	15	38	37	30	24	39	13	15	20
	42%	40%	55%	71%	38%	78%	55%	34%	46%	43%	33%	45%	38%	31%
Poor reliability and punctuality of commuter train services into London	200	173	27	16	184	3	21	27	30	27	49	19	24	13
	40%	39%	49%	25%	42%	13%	30%	25%	46%	49%	42%	65%	60%	20%
Lack of capacity on London's tube and bus services	182	160	22	11	171	2	23	35	19	24	49	9	22	20
	36%	36%	40%	18%	39%	11%	33%	33%	30%	43%	42%	31%	54%	31%
Business crime in London (e.g. fraud and economic crimes)	128	117	11	15	113	6	14	33	11	17	30	6	9	21
	25%	26%	20%	23%	26%	33%	21%	31%	17%	31%	25%	22%	23%	31%
Lack of London airport capacity	79	74	6	17	62	5	15	18	7	10	18	4	3	9
	16%	16%	10%	28%	14%	26%	22%	16%	11%	18%	15%	14%	7%	14%
Not Stated	58	56	3	4	54	-	5	13	10	4	22	2	3	8
	12%	12%	5%	6%	12%	-	7%	12%	15%	7%	18%	8%	7%	12%

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Top three

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU/ EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of housing that people can afford	255	116	139	43	200	12	44	211	87	167	70	170	15	242	82	30
	51%	49%	53%	66%	49%	44%	64%	49%	50%	51%	60%	47%	60%	50%	58%	39%
The current business rates system	213	94	119	33	168	12	36	177	76	137	51	149	14	206	68	36
	42%	40%	45%	51%	41%	45%	52%	41%	44%	41%	43%	41%	58%	43%	48%	47%
Lack of sufficiently skilled workers	211	94	117	39	159	13	41	170	79	132	53	148	10	206	71	30
	42%	39%	44%	59%	39%	48%	60%	39%	45%	40%	45%	41%	40%	43%	50%	38%
Poor reliability and punctuality of commuter train services into London	200	100	100	29	157	13	33	167	81	119	43	147	9	196	57	37
	40%	42%	38%	45%	38%	51%	48%	38%	47%	36%	37%	41%	38%	41%	40%	47%
Lack of capacity on London's tube and bus services	182	95	86	20	157	6	21	162	76	106	42	129	11	172	56	33
	36%	40%	32%	30%	38%	22%	30%	37%	44%	32%	35%	36%	48%	36%	39%	42%
Business crime in London (e.g. fraud and economic crimes)	128	58	68	14	109	5	15	113	48	80	25	99	4	124	23	21
	25%	25%	26%	22%	26%	19%	21%	26%	28%	24%	21%	27%	17%	26%	17%	27%
Lack of London airport capacity	79	34	45	7	68	4	5	74	20	59	14	63	3	76	18	12
	16%	14%	17%	11%	17%	16%	8%	17%	12%	18%	12%	17%	10%	16%	13%	15%
Not Stated	58	30	29	3	51	4	3	55	13	46	12	45	2	54	14	10
	12%	13%	11%	5%	12%	16%	5%	13%	7%	14%	10%	12%	8%	11%	10%	13%

QES Q1 2015

2. In the last twelve months how much impact, if any, do you believe that problems such as delays, cancellations and overcrowding on commuter train services into London (including National Rail services, but excluding the Underground and Overground) have had on your business?

Base: All respondents

	Business size			Industry										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A great deal of impact	53	46	7	3	51	3	2	7	8	10	14	4	6	7
	11%	10%	12%	4%	11%	13%	3%	7%	12%	18%	12%	14%	14%	10%
A fair amount of impact	133	114	19	11	122	3	14	20	20	16	38	7	15	10
	26%	25%	35%	18%	28%	16%	20%	18%	30%	28%	32%	25%	39%	15%
Not a great deal of impact	150	133	17	22	129	9	24	31	20	17	27	11	11	18
	30%	30%	32%	34%	29%	48%	34%	28%	31%	30%	23%	39%	28%	27%
No impact	157	146	11	28	129	4	29	49	15	10	34	6	8	30
	31%	33%	20%	44%	29%	22%	42%	45%	24%	19%	29%	22%	19%	45%
Don't know	10	9	*	-	10	-	-	1	2	2	4	-	-	1
	2%	2%	1%	-	2%	-	-	1%	3%	4%	4%	-	-	2%
Nets														
Any impact (a great deal / a fair amount / not a great deal)	337	293	43	35	301	15	40	58	48	42	79	23	32	34
	67%	65%	79%	56%	68%	78%	58%	54%	73%	77%	67%	78%	81%	53%
High impact (a great deal / a fair amount)	186	160	26	14	172	6	16	27	27	26	52	11	21	17
	37%	36%	48%	22%	39%	30%	23%	25%	42%	46%	44%	39%	53%	26%
Low impact (Not a great deal / no impact)	307	279	28	49	258	14	53	79	36	27	61	18	19	47
	61%	62%	52%	78%	59%	70%	77%	74%	55%	49%	52%	61%	47%	72%

QES Q1 2015

2. In the last twelve months how much impact, if any, do you believe that problems such as delays, cancellations and overcrowding on commuter train services into London (including National Rail services, but excluding the Underground and Overground) have had on your business?

Base: All respondents

	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU/ EEA	
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A great deal of impact	53	28	26	12	40	2	8	46	23	30	19	32	2	50	21	18
	11%	12%	10%	19%	10%	6%	11%	10%	13%	9%	16%	9%	8%	10%	15%	23%
A fair amount of impact	133	78	55	28	97	8	22	111	46	87	28	98	7	129	47	28
	26%	33%	21%	44%	23%	31%	32%	26%	27%	26%	24%	27%	30%	27%	33%	36%
Not a great deal of impact	150	75	75	16	127	8	23	127	51	100	25	114	12	149	37	16
	30%	32%	28%	24%	31%	30%	34%	29%	29%	30%	21%	31%	50%	31%	26%	21%
No impact	157	50	105	7	140	9	14	142	49	108	42	112	3	145	32	10
	31%	21%	40%	11%	34%	33%	21%	33%	28%	33%	36%	31%	12%	30%	23%	13%
Don't know	10	6	4	1	9	-	2	8	5	5	4	6	-	8	5	6
	2%	2%	2%	2%	2%	-	3%	2%	3%	2%	3%	2%	-	2%	3%	7%
Nets																
Any impact (a great deal / a fair amount / not a great deal)	337	181	156	56	263	17	53	284	120	217	72	244	21	328	105	62
	67%	76%	59%	87%	64%	67%	77%	65%	69%	66%	61%	67%	88%	68%	74%	80%
High impact (a great deal / a fair amount)	186	106	80	40	136	10	30	157	69	117	47	130	9	179	68	46
	37%	45%	30%	62%	33%	37%	43%	36%	40%	35%	40%	36%	38%	37%	48%	59%
Low impact (Not a great deal / no impact)	307	125	180	23	267	17	37	270	99	208	67	226	15	294	69	26
	61%	53%	68%	36%	65%	63%	54%	62%	57%	63%	57%	62%	62%	61%	49%	34%

QES Q1 2015

3. 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

	A member of staff being late to work due to delays, cancellations or overcrowding on trains into London	A member of staff being unable to come to work due to delays, cancellations or overcrowding on trains into London	Insufficient staffing levels for your business to open / operate due to delays, cancellations or overcrowding on trains into London	Cancelled meetings or fewer customers due to delays, cancellations or overcrowding on trains into London
Unweighted Total	503	503	503	503
Weighted Total	503	503	503	503
	100%	100%	100%	100%
At least once a day	12 2%	3 1%	2 *	1 *
Less than once a day but at least once a week	68 14%	15 3%	18 3%	20 4%
Less than once a week but at least once a month	86 17%	57 11%	40 8%	57 11%
Less than once a month but at least once every six months	65 13%	81 16%	39 8%	92 18%
Less than once every six months	59 12%	86 17%	53 11%	82 16%
Never in the last twelve months	177 35%	225 45%	314 62%	218 43%
Don't know	37 7%	37 7%	38 8%	33 7%
Net				
At least once in the last twelve months	290 58%	241 48%	151 30%	252 50%

QES Q1 2015

3. 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										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	12	6	7	-	12	-	2	3	1	2	2	*	2	2
	2%	1%	12%	-	3%	-	3%	3%	1%	3%	1%	1%	4%	2%
Less than once a day but at least once a week	68	54	15	7	62	3	5	14	11	8	14	5	8	9
	14%	12%	27%	10%	14%	13%	8%	13%	17%	14%	12%	16%	20%	14%
Less than once a week but at least once a month	86	76	10	7	79	*	9	11	16	12	24	5	8	10
	17%	17%	18%	10%	18%	2%	12%	10%	24%	22%	21%	17%	21%	15%
Less than once a month but at least once every six months	65	57	8	7	58	1	11	14	7	8	13	6	4	7
	13%	13%	14%	10%	13%	5%	16%	13%	10%	14%	12%	22%	10%	10%
Less than once every six months	59	55	4	13	46	5	9	10	7	5	17	3	4	6
	12%	12%	8%	20%	11%	24%	13%	9%	10%	9%	15%	9%	10%	10%
Never in the last twelve months	177	167	9	27	150	11	27	49	20	14	39	7	10	30
	35%	37%	17%	42%	34%	55%	39%	45%	31%	25%	33%	26%	25%	45%
Don't know	37	34	3	4	32	-	6	6	4	7	7	3	4	2
	7%	8%	5%	6%	7%	-	9%	5%	6%	13%	6%	9%	9%	3%
Net														
At least once in the last twelve months	290	247	43	33	257	9	36	53	41	35	71	19	26	34
	58%	55%	78%	52%	59%	45%	52%	49%	63%	62%	61%	66%	66%	52%

QES Q1 2015

3. 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			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU / EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	12	8	4	4	7	2	4	8	7	5	6	6	*	12	7	6
	2%	4%	1%	6%	2%	7%	6%	2%	4%	2%	5%	2%	1%	3%	5%	8%
Less than once a day but at least once a week	68	43	25	16	45	7	23	46	21	48	20	46	3	66	25	15
	14%	18%	10%	25%	11%	28%	33%	11%	12%	14%	17%	13%	12%	14%	17%	19%
Less than once a week but at least once a month	86	46	40	20	59	6	15	71	36	49	24	58	4	84	29	17
	17%	19%	15%	31%	14%	23%	21%	16%	21%	15%	20%	16%	18%	18%	20%	21%
Less than once a month but at least once every six months	65	26	39	13	51	1	13	52	22	42	12	47	5	62	25	20
	13%	11%	15%	19%	12%	2%	19%	12%	13%	13%	11%	13%	20%	13%	18%	25%
Less than once every six months	59	26	33	4	53	3	6	53	22	38	17	38	4	56	20	6
	12%	11%	13%	6%	13%	11%	9%	12%	12%	11%	15%	11%	16%	12%	14%	8%
Never in the last twelve months	177	68	108	6	164	7	5	171	54	122	31	138	7	168	22	8
	35%	28%	41%	9%	40%	27%	8%	39%	31%	37%	26%	38%	30%	35%	16%	10%
Don't know	37	21	15	2	34	1	3	34	11	25	8	28	1	33	13	6
	7%	9%	6%	3%	8%	3%	4%	8%	7%	8%	6%	8%	2%	7%	9%	8%
Net																
At least once in the last twelve months	290	148	142	57	215	18	61	229	108	182	79	195	16	281	106	64
	58%	63%	53%	88%	52%	70%	89%	53%	62%	55%	67%	54%	68%	58%	75%	82%

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3. 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										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	3	1	2	-	3	-	-	*	1	*	*	*	1	*
	1%	*	3%	-	1%	-	-	*	1%	*	*	2%	1%	*
Less than once a day but at least once a week	15	9	6	-	15	-	-	2	4	2	2	3	2	2
	3%	2%	10%	-	3%	-	-	2%	6%	3%	2%	10%	5%	3%
Less than once a week but at least once a month	57	49	8	2	55	-	5	11	9	8	18	1	6	7
	11%	11%	15%	3%	13%	-	7%	10%	14%	14%	15%	5%	14%	11%
Less than once a month but at least once every six months	81	68	13	17	64	1	19	13	11	8	19	4	7	9
	16%	15%	24%	27%	15%	5%	28%	12%	16%	14%	16%	14%	17%	14%
Less than once every six months	86	76	10	14	72	8	11	13	15	8	18	6	6	4
	17%	17%	19%	22%	16%	40%	16%	13%	23%	15%	15%	20%	16%	6%
Never in the last twelve months	225	212	13	27	198	11	28	63	23	22	52	12	14	41
	45%	47%	24%	42%	45%	55%	41%	58%	36%	40%	44%	40%	36%	63%
Don't know	37	34	3	4	32	-	6	6	2	7	9	3	4	2
	7%	8%	5%	6%	7%	-	9%	5%	4%	13%	7%	10%	9%	2%
Net														
At least once in the last twelve months	241	202	39	33	209	9	35	39	39	26	57	15	22	23
	48%	45%	71%	52%	47%	45%	51%	37%	60%	47%	48%	50%	54%	34%

QES Q1 2015

3. 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			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU / EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	3	3	*	2	1	-	2	1	2	1	2	1	*	3	2	2
	1%	1%	*	3%	*	-	3%	*	1%	*	1%	*	1%	1%	1%	3%
Less than once a day but at least once a week	15	7	8	6	8	1	6	9	8	7	4	10	1	15	8	5
	3%	3%	3%	9%	2%	4%	8%	2%	5%	2%	4%	3%	2%	3%	5%	6%
Less than once a week but at least once a month	57	32	25	17	34	6	18	39	22	35	21	35	1	56	22	18
	11%	14%	9%	27%	8%	23%	26%	9%	13%	11%	18%	10%	3%	12%	15%	23%
Less than once a month but at least once every six months	81	41	40	18	58	4	19	62	25	55	23	50	8	76	39	20
	16%	17%	15%	29%	14%	16%	27%	14%	15%	17%	20%	14%	32%	16%	28%	25%
Less than once every six months	86	48	37	8	74	4	7	79	30	56	21	58	7	83	25	14
	17%	20%	14%	12%	18%	15%	10%	18%	17%	17%	18%	16%	28%	17%	18%	18%
Never in the last twelve months	225	85	139	12	203	10	15	210	73	152	40	178	8	216	33	14
	45%	36%	53%	18%	49%	38%	22%	48%	42%	46%	34%	49%	31%	45%	24%	18%
Don't know	37	21	15	2	34	1	3	34	12	24	7	29	1	33	12	5
	7%	9%	6%	3%	8%	3%	4%	8%	7%	7%	6%	8%	2%	7%	9%	7%
Net																
At least once in the last twelve months	241	131	110	51	175	15	51	191	88	154	71	155	16	232	96	59
	48%	55%	42%	78%	43%	59%	74%	44%	51%	47%	60%	43%	66%	48%	68%	75%

QES Q1 2015

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										
	Total	1-9	10+	Net: Manufacturing	Net: Services	Agriculture, forestry & fishing / Production	Construction / Property	Motor trades / Wholesale / Retail / Transport & storage / Accommodation & food services	Information & communication	Finance & insurance / Business administration and support services	Professional, scientific & technical	Public administration and defence / Education / Health	Arts, entertainment, recreation and other services	Retail and wholesale
Unweighted Total	503	371	132	26	477	12	49	76	46	93	105	38	84	52
Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	2 *	1 *	1 2%	-	2 *	-	-	-	1 1%	1 1%	* *	-	-	-
Less than once a day but at least once a week	18 3%	12 3%	5 10%	2 3%	16 4%	-	2 3%	5 4%	2 3%	2 3%	4 3%	3 9%	1 3%	1 2%
Less than once a week but at least once a month	40 8%	34 8%	5 9%	4 6%	35 8%	-	5 8%	4 4%	9 13%	7 12%	8 7%	2 8%	4 11%	4 6%
Less than once a month but at least once every six months	39 8%	32 7%	7 12%	4 6%	35 8%	2 11%	3 5%	9 8%	4 6%	4 8%	11 9%	3 9%	3 7%	7 11%
Less than once every six months	53 11%	47 11%	6 11%	12 18%	42 9%	1 8%	12 18%	3 3%	9 13%	8 15%	11 9%	2 7%	6 15%	2 2%
Never in the last twelve months	314 62%	286 64%	28 52%	38 60%	276 63%	16 81%	40 58%	80 74%	38 58%	26 48%	76 65%	17 58%	21 53%	50 77%
Don't know	38 8%	36 8%	2 4%	4 6%	34 8%	-	6 9%	7 6%	4 6%	7 13%	7 6%	3 9%	4 11%	1 2%
Net														
At least once in the last twelve months	151 30%	127 28%	24 44%	21 34%	130 29%	4 19%	23 33%	21 20%	24 36%	22 39%	34 29%	10 33%	14 36%	14 21%

QES Q1 2015

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	Location		Expected changes in workforce size			Past recruitment		Capacity		Expected prices			Employment areas			
	Total	Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not recruit	Full capacity	Below capacity	Rise	Stay the same	Fall	UK citizens	EU / EEA citizens	Citizens from outside the UK / EU / EEA
Unweighted Total	503	273	229	80	397	26	91	412	195	308	102	376	25	489	163	100
Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	2	1	1	1	1	-	1	1	1	1	1	*	-	2	1	1
	*	*	*	1%	*	-	2%	*	*	*	1%	*	-	*	1%	2%
Less than once a day but at least once a week	18	14	4	11	6	1	10	7	9	8	11	7	-	18	8	8
	3%	6%	1%	17%	1%	3%	15%	2%	5%	3%	9%	2%	-	4%	6%	10%
Less than once a week but at least once a month	40	17	23	13	22	5	6	33	16	24	12	26	2	39	12	7
	8%	7%	9%	20%	5%	17%	9%	8%	9%	7%	10%	7%	7%	8%	9%	9%
Less than once a month but at least once every six months	39	20	19	8	29	2	7	32	11	28	10	22	6	36	17	19
	8%	9%	7%	12%	7%	9%	11%	7%	7%	8%	9%	6%	26%	8%	12%	24%
Less than once every six months	53	26	27	3	48	2	9	44	17	36	11	38	5	51	21	7
	11%	11%	10%	5%	12%	9%	13%	10%	10%	11%	9%	10%	19%	11%	15%	8%
Never in the last twelve months	314	139	174	25	274	15	30	284	103	211	62	242	10	301	70	29
	62%	59%	66%	39%	66%	59%	44%	65%	60%	64%	53%	67%	42%	63%	50%	38%
Don't know	38	20	18	4	33	1	4	34	15	23	10	26	1	35	12	6
	8%	8%	7%	6%	8%	3%	6%	8%	9%	7%	9%	7%	5%	7%	8%	8%
Net																
At least once in the last twelve months	151	78	73	36	105	10	34	117	55	96	45	93	13	146	60	43
	30%	33%	28%	55%	26%	38%	50%	27%	32%	29%	39%	26%	52%	30%	42%	54%

QES Q1 2015

3. 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										
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Weighted Total	503	448	55	63	440	20	69	108	65	55	117	29	40	65
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	1 *	- -	1 2%	- -	1 *	- -	- -	- -	* 1%	- -	- -	1 2%	- -	- -
Less than once a day but at least once a week	20 4%	14 3%	6 11%	2 3%	18 4%	- -	3 5%	5 4%	2 4%	1 2%	6 5%	1 2%	1 3%	1 2%
Less than once a week but at least once a month	57 11%	48 11%	9 16%	5 7%	53 12%	* 2%	5 8%	9 8%	9 15%	7 13%	15 13%	4 15%	7 17%	5 8%
Less than once a month but at least once every six months	92 18%	84 19%	8 14%	5 7%	87 20%	3 16%	7 10%	10 10%	15 24%	13 24%	26 22%	6 19%	11 27%	10 16%
Less than once every six months	82 16%	73 16%	10 18%	15 24%	67 15%	9 46%	11 16%	10 9%	15 23%	11 20%	17 15%	2 7%	7 18%	6 10%
Never in the last twelve months	218 43%	199 44%	20 36%	33 52%	185 42%	7 36%	37 54%	65 60%	22 34%	17 30%	46 39%	13 46%	11 27%	38 59%
Don't know	33 7%	31 7%	2 4%	4 6%	29 7%	- -	5 7%	9 9%	* 1%	6 10%	7 6%	3 9%	3 8%	4 6%
Net														
At least once in the last twelve months	252 50%	218 49%	33 61%	26 42%	225 51%	13 64%	27 39%	33 31%	43 66%	33 60%	64 55%	13 45%	26 65%	23 35%

QES Q1 2015

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Weighted Total	503	237	265	65	412	26	68	435	173	330	117	362	24	482	141	78
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
At least once a day	1	1	-	*	1	-	1	-	1	-	*	1	-	1	1	*
	*	*	-	1%	*	-	1%	-	1%	-	*	*	-	*	1%	1%
Less than once a day but at least once a week	20	14	6	12	8	-	11	9	9	10	10	7	2	20	9	7
	4%	6%	2%	18%	2%	-	15%	2%	5%	3%	9%	2%	9%	4%	6%	9%
Less than once a week but at least once a month	57	25	32	12	38	7	8	49	21	36	14	42	1	57	17	13
	11%	10%	12%	19%	9%	25%	12%	11%	12%	11%	12%	12%	5%	12%	12%	16%
Less than once a month but at least once every six months	92	52	40	20	71	1	17	75	30	62	18	66	8	84	31	25
	18%	22%	15%	32%	17%	2%	25%	17%	17%	19%	15%	18%	31%	18%	22%	32%
Less than once every six months	82	43	39	4	74	4	7	75	27	55	18	59	6	81	29	12
	16%	18%	15%	7%	18%	16%	10%	17%	16%	17%	15%	16%	23%	17%	20%	16%
Never in the last twelve months	218	85	132	14	191	13	20	198	75	143	49	162	7	210	44	16
	43%	36%	50%	21%	46%	49%	29%	46%	43%	43%	42%	45%	30%	43%	31%	20%
Don't know	33	18	16	2	30	2	5	28	10	23	8	25	1	30	11	5
	7%	7%	6%	2%	7%	8%	8%	6%	6%	7%	7%	7%	2%	6%	8%	7%
Net																
At least once in the last twelve months	252	134	117	49	191	11	43	208	88	163	60	175	16	242	86	57
	50%	57%	44%	76%	46%	43%	63%	48%	51%	50%	51%	48%	68%	50%	61%	73%