

**YouGov / Portland Communications  
Fieldwork - October 2013**

Sample Size - 155 Senior Business Decision Makers

Total	Gender		Age					Organisation size	
Base	Male	Female	18-24	25-34	35-44	45-54	55+	Small	Medium

In general which, if any, of the following do you think are currently the main barriers for small technology companies in London that want to expand/ grow (e.g. increase turnover, number of staff etc.)? (Please tick all that apply. If you do not think that there are any barriers to growth for small technology companies in London that want to expand, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	155	123	32	2	22	38	43	50	134	21
Lack of access to second stage funding or investment	22%	21%	25%	-	27%	26%	23%	16%	19%	43%
Lack of high quality office space at the right price	25%	28%	16%	50%	36%	29%	28%	14%	22%	43%
High staff turnover	14%	14%	16%	50%	27%	13%	19%	4%	11%	33%
Lack of available, suitably qualified/ experienced staff	24%	20%	38%	50%	27%	37%	23%	12%	23%	29%
The cost of running a business (i.e. staff and operational expenses)	48%	48%	47%	-	55%	55%	49%	40%	47%	52%
Lack of a supportive local business community	18%	18%	19%	-	18%	21%	23%	12%	18%	19%
Limited access to clients	25%	29%	6%	-	32%	37%	23%	14%	23%	33%
London's digital infrastructure not being strong enough	10%	11%	9%	50%	18%	16%	5%	6%	8%	24%
Other (Please see tab Q1 Other)	9%	11%	-	-	-	8%	7%	16%	10%	5%
Don't know	6%	4%	13%	-	5%	5%	5%	8%	6%	5%
Not applicable – I do not think that there are any barriers for small technology companies in London that want to expand/ grow	10%	11%	9%	-	5%	3%	12%	18%	10%	10%

Sample Size - 155 Senior Business Decision Makers

Company annual turnover					
First year of trading	Less than £999,999 (NET)	£1 million - £ 9.9 million (NET)	£ 10 million or more (NET)	Don't know	Prefer not to answer

In general which, if any, of the following do you think are currently the main barriers for small technology companies in London that want to expand/ grow (e.g. increase turnover, number of staff etc.)? (Please tick all that apply. If you do not think that there are any barriers to growth for small technology companies in London that want to expand, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Lack of access to second stage funding or investment	100%	16%	19%	47%	30%	13%
Lack of high quality office space at the right price	-	24%	35%	24%	30%	19%
High staff turnover	-	11%	23%	35%	10%	-
Lack of available, suitably qualified/ experienced staff	-	20%	31%	41%	30%	13%
The cost of running a business (i.e. staff and operational expenses)	67%	41%	58%	59%	60%	44%
Lack of a supportive local business community	-	18%	8%	35%	30%	13%
Limited access to clients	33%	28%	23%	29%	30%	-
London's digital infrastructure not being strong enough	-	7%	12%	18%	-	25%
Other (Please see tab Q1 Other)	-	13%	8%	6%	-	-
Don't know	-	6%	-	-	20%	13%
Not applicable – I do not think that there are any barriers for small technology companies in London that want to expand/ grow	-	10%	4%	12%	-	31%

Sample Size - 155 Senior Business Decision Makers

Industry				
Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing

In general which, if any, of the following do you think are currently the main barriers for small technology companies in London that want to expand/ grow (e.g. increase turnover, number of staff etc.)? (Please tick all that apply. If you do not think that there are any barriers to growth for small technology companies in London that want to expand, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	24	22	37	9	37
Lack of access to second stage funding or investment	29%	14%	27%	33%	24%
Lack of high quality office space at the right price	29%	27%	30%	22%	24%
High staff turnover	8%	9%	14%	11%	22%
Lack of available, suitably qualified/ experienced staff	17%	18%	38%	22%	16%
The cost of running a business (i.e. staff and operational expenses)	42%	50%	59%	33%	49%
Lack of a supportive local business community	8%	18%	19%	11%	24%
Limited access to clients	17%	9%	19%	22%	49%
London's digital infrastructure not being strong enough	25%	9%	5%	-	8%
Other (Please see tab Q1 Other)	13%	9%	11%	11%	3%
Don't know	-	18%	3%	11%	3%
Not applicable – I do not think that there are any barriers for small technology companies in London that want to expand/ grow	8%	9%	5%	22%	11%

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Sample Size - 155 Senior Business Decision Makers

Internet/ Web Development	Telecommunications	Other Technology Services industry
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In general which, if any, of the following do you think are currently the main barriers for small technology companies in London that want to expand/ grow (e.g. increase turnover, number of staff etc.)? (Please tick all that apply. If you do not think that there are any barriers to growth for small technology companies in London that want to expand, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Lack of access to second stage funding or investment	8%	-	14%
Lack of high quality office space at the right price	8%	17%	29%
High staff turnover	31%	-	-
Lack of available, suitably qualified/ experienced staff	23%	17%	43%
The cost of running a business (i.e. staff and operational expenses)	38%	33%	43%
Lack of a supportive local business community	-	50%	29%
Limited access to clients	15%	17%	29%
London's digital infrastructure not being strong enough	8%	17%	14%
Other (Please see tab Q1 Other)	-	17%	29%
Don't know	15%	-	-
Not applicable – I do not think that there are any barriers for small technology companies in London that want to expand/ grow	31%	-	-

Sample Size - 155 Senior Business Decision Makers

Age of Business								
1 year old or less	Over 1 year up to 2 years old	Over 2 years up to 5 years old	Over 5 years up to 10 years old	Over 10 years up to 20 years old	Over 20 years up to 50 years old	Over 50 years old	Don't know	Up to 10 years

In general which, if any, of the following do you think are currently the main barriers for small technology companies in London that want to expand/ grow (e.g. increase turnover, number of staff etc.)? (Please tick all that apply. If you do not think that there are any barriers to growth for small technology companies in London that want to expand, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Lack of access to second stage funding or investment	50%	11%	16%	22%	19%	22%	100%	50%	21%
Lack of high quality office space at the right price	17%	22%	24%	14%	33%	22%	50%	50%	18%
High staff turnover	-	-	20%	14%	16%	17%	-	-	13%
Lack of available, suitably qualified/ experienced staff	-	33%	28%	19%	25%	33%	-	-	22%
The cost of running a business (i.e. staff and operational expenses)	67%	44%	44%	39%	51%	50%	100%	50%	43%
Lack of a supportive local business community	17%	44%	8%	11%	21%	22%	50%	-	14%
Limited access to clients	17%	33%	12%	28%	28%	22%	50%	-	22%
London's digital infrastructure not being strong enough	17%	22%	4%	11%	12%	6%	-	-	11%
Other (Please see tab Q1 Other)	-	-	8%	11%	11%	11%	-	-	8%
Don't know	-	-	12%	11%	2%	-	-	50%	9%
Not applicable – I do not think that there are any barriers for small technology companies in London that want to expand/ grow	-	11%	16%	6%	11%	17%	-	-	9%

Sample Size - 155 Senior Business Decision Makers

Total	Gender		Age					Organisation size	
	Male	Female	18-24	25-34	35-44	45-54	55+	Small	Medium

Which, if any, of the following have ever been obstacles to your technology business expanding/ growing in London?  
(Please tick all that apply. If there have never been any obstacles to your business expanding in London, please tick the "Not applicable" option)

Base: Middle managers and above from Tech SMEs in London	155	123	32	2	22	38	43	50	134	21
Lack of access to second stage funding or investment	12%	15%	3%	50%	14%	11%	14%	10%	12%	14%
Lack of high quality office space at the right price	21%	22%	16%	-	27%	24%	23%	14%	19%	29%
High staff turnover	12%	11%	16%	50%	27%	13%	14%	2%	8%	38%
Lack of available, suitably qualified/ experienced staff	19%	20%	19%	-	14%	24%	21%	18%	17%	33%
The cost of running the business (i.e. staff and operational expenses)	26%	28%	19%	-	27%	26%	35%	20%	26%	29%
Lack of a supportive local business community	14%	17%	-	100%	23%	11%	16%	6%	12%	24%
Limited access to clients	23%	27%	6%	-	18%	29%	21%	22%	22%	24%
London's digital infrastructure not being strong enough	10%	11%	6%	-	27%	8%	5%	8%	10%	10%
Other (Please see tab Q2 Other)	3%	4%	-	-	-	-	2%	8%	4%	-
Don't know	5%	3%	9%	-	5%	8%	5%	2%	4%	5%
Not applicable – there have never been any obstacles to my business expanding in London	26%	23%	38%	-	9%	8%	33%	42%	28%	10%

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London whose businesses have experienced obstacles to expanding in London	108	91	17	2	19	32	27	28	90	18
Slower than anticipated growth of the business	41%	45%	18%	50%	26%	38%	48%	46%	46%	17%
Lower than expected turnover	33%	36%	18%	50%	21%	25%	41%	43%	36%	22%
Unable to hire more staff	23%	25%	12%	-	42%	25%	22%	11%	20%	39%
Delayed product launch	14%	12%	24%	50%	11%	19%	11%	11%	9%	39%
Unable to meet orders or deadlines	10%	10%	12%	-	11%	13%	7%	11%	9%	17%
Lost out on new/ potential business	37%	40%	24%	-	26%	41%	44%	36%	39%	28%
Staff left the business	9%	7%	24%	-	21%	9%	4%	7%	8%	17%
None of these	7%	7%	12%	-	5%	3%	11%	11%	8%	6%
Don't know	3%	3%	-	-	5%	-	4%	4%	2%	6%

Sample Size - 155 Senior Business Decision Makers

Company annual turnover					
First year of trading	Less than £999,999 (NET)	£1 million - £ 9.9 million (NET)	£ 10 million or more (NET)	Don't know	Prefer not to answer

Which, if any, of the following have ever been obstacles to your technology business expanding/ growing in London? (Please tick all that apply. If there have never been any obstacles to your business expanding in London, please tick the "Not applicable" option)

	3	83	26	17	10	16
<b>Base: Middle managers and above from Tech SMEs in London</b>						
Lack of access to second stage funding or investment	67%	7%	15%	24%	20%	6%
Lack of high quality office space at the right price	-	19%	19%	24%	50%	13%
High staff turnover	-	7%	27%	29%	10%	-
Lack of available, suitably qualified/ experienced staff	-	13%	35%	35%	20%	13%
The cost of running the business (i.e. staff and operational expenses)	-	23%	35%	35%	40%	19%
Lack of a supportive local business community	-	11%	8%	35%	30%	6%
Limited access to clients	67%	25%	19%	24%	20%	6%
London's digital infrastructure not being strong enough	-	12%	-	18%	-	13%
Other (Please see tab Q2 Other)	-	6%	-	-	-	-
Don't know	-	5%	4%	6%	-	6%
Not applicable – there have never been any obstacles to my business expanding in London	-	31%	12%	12%	10%	50%

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

	3	53	22	14	9	7
<b>Base: Middle managers and above from Tech SMEs in London whose businesses have experienced obstacles to expanding in London</b>						
Slower than anticipated growth of the business	100%	45%	41%	29%	22%	29%
Lower than expected turnover	67%	40%	23%	36%	33%	-
Unable to hire more staff	-	19%	27%	36%	22%	29%
Delayed product launch	-	8%	23%	29%	11%	14%
Unable to meet orders or deadlines	-	9%	9%	21%	11%	-
Lost out on new/ potential business	-	47%	32%	14%	44%	29%
Staff left the business	-	6%	18%	21%	-	-
None of these	-	6%	5%	7%	11%	29%
Don't know	-	4%	-	-	11%	-

**YouGov / Portland Communications  
Fieldwork - October 2013**

Sample Size - 155 Senior Business Decision Makers

Industry				
Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing

Which, if any, of the following have ever been obstacles to your technology business expanding/ growing in London?  
(Please tick all that apply. If there have never been any obstacles to your business expanding in London, please tick the "Not applicable" option)

	24	22	37	9	37
<b>Base: Middle managers and above from Tech SMEs in London</b>					
Lack of access to second stage funding or investment	21%	-	8%	33%	16%
Lack of high quality office space at the right price	25%	14%	16%	-	30%
High staff turnover	17%	9%	3%	-	27%
Lack of available, suitably qualified/ experienced staff	21%	23%	24%	11%	16%
The cost of running the business (i.e. staff and operational expenses)	33%	14%	27%	11%	46%
Lack of a supportive local business community	8%	5%	8%	11%	27%
Limited access to clients	17%	18%	22%	33%	27%
London's digital infrastructure not being strong enough	25%	9%	-	-	16%
Other (Please see tab Q2 Other)	4%	5%	3%	-	-
Don't know	4%	5%	5%	-	3%
Not applicable – there have never been any obstacles to my business expanding in London	25%	45%	30%	44%	11%

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

	17	11	24	5	32
<b>Base: Middle managers and above from Tech SMEs in London whose businesses have experienced obstacles to expanding in London</b>					
Slower than anticipated growth of the business	47%	45%	58%	20%	31%
Lower than expected turnover	41%	36%	33%	-	28%
Unable to hire more staff	29%	27%	17%	20%	28%
Delayed product launch	24%	9%	8%	-	13%
Unable to meet orders or deadlines	6%	18%	13%	-	9%
Lost out on new/ potential business	53%	18%	38%	40%	38%
Staff left the business	12%	9%	8%	-	9%
None of these	-	9%	8%	40%	6%
Don't know	-	-	4%	-	6%

**YouGov / Portland Communications  
Fieldwork - October 2013**

Sample Size - 155 Senior Business Decision Makers

Internet/ Web Development	Telecommunications	Other Technology Services industry
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Which, if any, of the following have ever been obstacles to your technology business expanding/ growing in London? (Please tick all that apply. If there have never been any obstacles to your business expanding in London, please tick the "Not applicable" option)

Base: Middle managers and above from Tech SMEs in London	13	6	7
Lack of access to second stage funding or investment	8%	-	14%
Lack of high quality office space at the right price	23%	17%	29%
High staff turnover	15%	-	-
Lack of available, suitably qualified/ experienced staff	15%	17%	14%
The cost of running the business (i.e. staff and operational expenses)	-	17%	14%
Lack of a supportive local business community	8%	50%	-
Limited access to clients	23%	17%	29%
London's digital infrastructure not being strong enough	-	-	14%
Other (Please see tab Q2 Other)	-	17%	14%
Don't know	8%	-	14%
Not applicable – there have never been any obstacles to my business expanding in London	31%	17%	-

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London whose businesses have experienced obstacles to expanding in London	8	5	6
Slower than anticipated growth of the business	25%	40%	33%
Lower than expected turnover	38%	20%	67%
Unable to hire more staff	13%	20%	17%
Delayed product launch	38%	20%	-
Unable to meet orders or deadlines	13%	-	17%
Lost out on new/ potential business	13%	40%	50%
Staff left the business	13%	-	17%
None of these	13%	-	-
Don't know	-	-	-

Sample Size - 155 Senior Business Decision Makers

Age of Business								
1 year old or less	Over 1 year up to 2 years old	Over 2 years up to 5 years old	Over 5 years up to 10 years old	Over 10 years up to 20 years old	Over 20 years up to 50 years old	Over 50 years old	Don't know	Up to 10 years

Which, if any, of the following have ever been obstacles to your technology business expanding/ growing in London?  
(Please tick all that apply. If there have never been any obstacles to your business expanding in London, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Lack of access to second stage funding or investment	33%	-	12%	11%	12%	11%	50%	-	12%
Lack of high quality office space at the right price	17%	33%	16%	3%	30%	28%	50%	-	12%
High staff turnover	-	11%	8%	14%	14%	17%	-	-	11%
Lack of available, suitably qualified/ experienced staff	-	11%	20%	25%	19%	22%	-	-	20%
The cost of running the business (i.e. staff and operational expenses)	33%	22%	12%	31%	35%	11%	50%	-	24%
Lack of a supportive local business community	17%	11%	4%	14%	14%	22%	50%	-	11%
Limited access to clients	33%	22%	12%	25%	28%	11%	50%	-	21%
London's digital infrastructure not being strong enough	17%	33%	-	6%	16%	-	-	-	8%
Other (Please see tab Q2 Other)	-	-	8%	3%	2%	6%	-	-	4%
Don't know	-	-	8%	8%	4%	-	-	-	7%
Not applicable – there have never been any obstacles to my business expanding in London	-	22%	40%	17%	28%	17%	50%	100%	24%

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

**Base: Middle managers and above from Tech SMEs in London whose businesses have experienced obstacles to expanding in London**

	6	7	13	27	39	15	1	-	53
Slower than anticipated growth of the business	67%	14%	46%	33%	49%	33%	-	-	38%
Lower than expected turnover	33%	14%	31%	19%	51%	27%	-	-	23%
Unable to hire more staff	33%	29%	31%	19%	21%	27%	-	-	25%
Delayed product launch	-	14%	23%	15%	18%	-	-	-	15%
Unable to meet orders or deadlines	-	29%	31%	4%	10%	-	-	-	13%
Lost out on new/ potential business	17%	29%	46%	26%	49%	27%	100%	-	30%
Staff left the business	-	-	-	11%	10%	20%	-	-	6%
None of these	-	-	-	11%	5%	20%	-	-	6%
Don't know	-	-	-	-	8%	-	-	-	-

Sample Size - 155 Senior Business Decision Makers

Total	Gender		Age					Organisation size	
Base	Male	Female	18-24	25-34	35-44	45-54	55+	Small	Medium

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London	155	123	32	2	22	38	43	50	134	21
Slower than anticipated growth of the business	28%	33%	9%	50%	23%	32%	30%	26%	31%	14%
Lower than expected turnover	23%	27%	9%	50%	18%	21%	26%	24%	24%	19%
Unable to hire more staff	16%	19%	6%	-	36%	21%	14%	6%	13%	33%
Delayed product launch	10%	9%	13%	50%	9%	16%	7%	6%	6%	33%
Unable to meet orders or deadlines	7%	7%	6%	-	9%	11%	5%	6%	6%	14%
Lost out on new/ potential business	26%	29%	13%	-	23%	34%	28%	20%	26%	24%
Staff left the business	6%	5%	13%	-	18%	8%	2%	4%	5%	14%
None of these	5%	5%	6%	-	5%	3%	7%	6%	5%	5%
Don't know	6%	6%	9%	-	9%	8%	7%	4%	6%	10%
Not applicable – there have never been any obstacles to my business expanding in London	26%	23%	38%	-	9%	8%	33%	42%	28%	10%

Over the next five years, in general do you think it will become more or less difficult for a technology start-up business to expand/ grow in London, or will there be no difference compared to now?

Base: Middle managers and above from Tech SMEs in London	155	123	32	2	22	38	43	50	134	21
Much more difficult	6%	6%	9%	-	14%	5%	7%	4%	7%	5%
Slightly more difficult	19%	16%	31%	-	27%	29%	12%	16%	19%	24%
No difference	37%	40%	28%	50%	27%	34%	42%	40%	39%	29%
Slightly less difficult	25%	28%	16%	-	27%	21%	30%	24%	24%	33%
Much less difficult	4%	5%	-	50%	5%	5%	-	4%	3%	10%
Don't know	8%	6%	16%	-	-	5%	9%	12%	9%	-

Sample Size - 155 Senior Business Decision Makers

Company annual turnover					
First year of trading	Less than £999,999 (NET)	£1 million - £ 9.9 million (NET)	£ 10 million or more (NET)	Don't know	Prefer not to answer

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Slower than anticipated growth of the business	100%	29%	35%	24%	20%	13%
Lower than expected turnover	67%	25%	19%	29%	30%	-
Unable to hire more staff	-	12%	23%	29%	20%	13%
Delayed product launch	-	5%	19%	24%	10%	6%
Unable to meet orders or deadlines	-	6%	8%	18%	10%	-
Lost out on new/ potential business	-	30%	27%	12%	40%	13%
Staff left the business	-	4%	15%	18%	-	-
None of these	-	4%	4%	6%	10%	13%
Don't know	-	7%	4%	6%	10%	6%
Not applicable – there have never been any obstacles to my business expanding in London	-	31%	12%	12%	10%	50%

Over the next five years, in general do you think it will become more or less difficult for a technology start-up business to expand/ grow in London, or will there be no difference compared to now?

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Much more difficult	-	7%	-	12%	-	13%
Slightly more difficult	-	18%	15%	29%	40%	13%
No difference	100%	34%	42%	24%	30%	56%
Slightly less difficult	-	29%	23%	29%	20%	13%
Much less difficult	-	1%	15%	6%	-	-
Don't know	-	11%	4%	-	10%	6%

Sample Size - 155 Senior Business Decision Makers

Industry				
Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London

	24	22	37	9	37
Slower than anticipated growth of the business	33%	23%	38%	11%	27%
Lower than expected turnover	29%	18%	22%	-	24%
Unable to hire more staff	21%	14%	11%	11%	24%
Delayed product launch	17%	5%	5%	-	11%
Unable to meet orders or deadlines	4%	9%	8%	-	8%
Lost out on new/ potential business	38%	9%	24%	22%	32%
Staff left the business	8%	5%	5%	-	8%
None of these	-	5%	5%	22%	5%
Don't know	4%	5%	8%	-	8%
Not applicable – there have never been any obstacles to my business expanding in London	25%	45%	30%	44%	11%

Over the next five years, in general do you think it will become more or less difficult for a technology start-up business to expand/ grow in London, or will there be no difference compared to now?

Base: Middle managers and above from Tech SMEs in London

	24	22	37	9	37
Much more difficult	4%	-	-	22%	11%
Slightly more difficult	29%	9%	19%	-	14%
No difference	29%	36%	51%	33%	35%
Slightly less difficult	29%	32%	22%	33%	30%
Much less difficult	-	5%	3%	-	8%
Don't know	8%	18%	5%	11%	3%

Sample Size - 155 Senior Business Decision Makers

Internet/ Web Development	Telecommunications	Other Technology Services industry
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You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Slower than anticipated growth of the business	15%	33%	29%
Lower than expected turnover	23%	17%	57%
Unable to hire more staff	8%	17%	14%
Delayed product launch	23%	17%	-
Unable to meet orders or deadlines	8%	-	14%
Lost out on new/ potential business	8%	33%	43%
Staff left the business	8%	-	14%
None of these	8%	-	-
Don't know	8%	-	14%
Not applicable – there have never been any obstacles to my business expanding in London	31%	17%	-

Over the next five years, in general do you think it will become more or less difficult for a technology start-up business to expand/ grow in London, or will there be no difference compared to now?

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Much more difficult	23%	-	-
Slightly more difficult	23%	50%	43%
No difference	38%	17%	29%
Slightly less difficult	8%	33%	-
Much less difficult	8%	-	-
Don't know	-	-	29%

Sample Size - 155 Senior Business Decision Makers

Age of Business								
1 year old or less	Over 1 year up to 2 years old	Over 2 years up to 5 years old	Over 5 years up to 10 years old	Over 10 years up to 20 years old	Over 20 years up to 50 years old	Over 50 years old	Don't know	Up to 10 years

You mentioned there have been one or more obstacles to your technology business expanding/ growing in London...

Which, if any, of the following have ever been impacts of these obstacles? (Please tick all that apply)

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Slower than anticipated growth of the business	67%	11%	24%	25%	33%	28%	-	-	26%
Lower than expected turnover	33%	11%	16%	14%	35%	22%	-	-	16%
Unable to hire more staff	33%	22%	16%	14%	14%	22%	-	-	17%
Delayed product launch	-	11%	12%	11%	12%	-	-	-	11%
Unable to meet orders or deadlines	-	22%	16%	3%	7%	-	-	-	9%
Lost out on new/ potential business	17%	22%	24%	19%	33%	22%	50%	-	21%
Staff left the business	-	-	-	8%	7%	17%	-	-	4%
None of these	-	-	-	8%	4%	17%	-	-	4%
Don't know	-	-	8%	8%	9%	-	-	-	7%
Not applicable – there have never been any obstacles to my business expanding in London	-	22%	40%	17%	28%	17%	50%	100%	24%

Over the next five years, in general do you think it will become more or less difficult for a technology start-up business to expand/ grow in London, or will there be no difference compared to now?

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Much more difficult	-	-	4%	8%	9%	6%	-	-	5%
Slightly more difficult	-	33%	28%	11%	25%	11%	-	-	18%
No difference	83%	33%	36%	25%	35%	61%	50%	-	34%
Slightly less difficult	17%	22%	28%	36%	19%	17%	50%	50%	30%
Much less difficult	-	-	-	8%	4%	6%	-	-	4%
Don't know	-	11%	4%	11%	9%	-	-	50%	8%

Sample Size - 155 Senior Business Decision Makers

Total	Gender		Age					Organisation size	
Base	Male	Female	18-24	25-34	35-44	45-54	55+	Small	Medium

Over the next five years, how likely or unlikely do you think your technology business will be to consider expanding or re-locating to another UK region(s) outside of London? (If your business is already considering expanding or relocating to another UK region(s) outside of London, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	155	123	32	2	22	38	43	50	134	21
Very likely	4%	5%	-	50%	9%	5%	2%	-	2%	14%
Fairly likely	14%	13%	19%	-	27%	11%	19%	8%	15%	10%
Fairly unlikely	29%	28%	31%	50%	32%	26%	37%	22%	28%	38%
Very unlikely	40%	43%	28%	-	23%	37%	30%	60%	43%	24%
Don't know	10%	9%	16%	-	9%	13%	12%	8%	11%	5%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	3%	2%	6%	-	-	8%	-	2%	1%	10%

For the following questions, by "other regional tech hubs" we mean large cities other than London such as Birmingham, Manchester, Bristol etc...

Overall do you think the UK's other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.) will grow or decline over the next 5 years, or there will be no difference compared to now? (Please tick the option that BEST applies)

**Base: Middle managers and above from Tech SMEs in London**

	155	123	32	2	22	38	43	50	134	21
Grow rapidly	3%	3%	-	50%	9%	-	2%	-	2%	5%
Grow steadily	41%	37%	53%	-	55%	34%	37%	44%	37%	62%
No difference	35%	37%	28%	50%	23%	39%	42%	32%	38%	19%
Decline steadily	9%	11%	3%	-	9%	13%	7%	8%	10%	5%
Decline rapidly	-	-	-	-	-	-	-	-	-	-
Don't know	12%	11%	16%	-	5%	13%	12%	16%	13%	10%

Sample Size - 155 Senior Business Decision Makers

Company annual turnover					
First year of trading	Less than £999,999 (NET)	£1 million - £ 9.9 million (NET)	£ 10 million or more (NET)	Don't know	Prefer not to answer

Over the next five years, how likely or unlikely do you think your technology business will be to consider expanding or re-locating to another UK region(s) outside of London? (If your business is already considering expanding or relocating to another UK region(s) outside of London, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Very likely	-	-	15%	12%	-	-
Fairly likely	33%	13%	12%	18%	20%	13%
Fairly unlikely	33%	30%	31%	29%	20%	25%
Very unlikely	33%	47%	35%	35%	30%	25%
Don't know	-	10%	8%	-	20%	25%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	-	-	-	6%	10%	13%

For the following questions, by "other regional tech hubs" we mean large cities other than London such as Birmingham, Manchester, Bristol etc...

Overall do you think the UK's other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.) will grow or decline over the next 5 years, or there will be no difference compared to now? (Please tick the option that BEST applies)

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Grow rapidly	-	2%	4%	6%	-	-
Grow steadily	100%	37%	42%	59%	30%	31%
No difference	-	31%	46%	18%	70%	44%
Decline steadily	-	11%	-	12%	-	19%
Decline rapidly	-	-	-	-	-	-
Don't know	-	18%	8%	6%	-	6%

Sample Size - 155 Senior Business Decision Makers

Industry				
Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing

Over the next five years, how likely or unlikely do you think your technology business will be to consider expanding or re-locating to another UK region(s) outside of London? (If your business is already considering expanding or relocating to another UK region(s) outside of London, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	24	22	37	9	37
Very likely	-	-	5%	11%	5%
Fairly likely	21%	14%	14%	-	14%
Fairly unlikely	38%	32%	16%	11%	35%
Very unlikely	42%	45%	43%	33%	41%
Don't know	-	9%	19%	44%	3%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	-	-	3%	-	3%

For the following questions, by "other regional tech hubs" we mean large cities other than London such as Birmingham, Manchester, Bristol etc...

Overall do you think the UK's other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.) will grow or decline over the next 5 years, or there will be no difference compared to now? (Please tick the option that BEST applies)

**Base: Middle managers and above from Tech SMEs in London**

	24	22	37	9	37
Grow rapidly	-	-	-	-	8%
Grow steadily	38%	41%	38%	44%	51%
No difference	42%	41%	38%	22%	30%
Decline steadily	13%	-	8%	22%	8%
Decline rapidly	-	-	-	-	-
Don't know	8%	18%	16%	11%	3%

Sample Size - 155 Senior Business Decision Makers

Internet/ Web Development	Telecommunications	Other Technology Services industry
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Over the next five years, how likely or unlikely do you think your technology business will be to consider expanding or re-locating to another UK region(s) outside of London? (If your business is already considering expanding or relocating to another UK region(s) outside of London, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Very likely	8%	-	-
Fairly likely	15%	17%	14%
Fairly unlikely	23%	33%	57%
Very unlikely	38%	33%	14%
Don't know	8%	-	14%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	8%	17%	-

For the following questions, by "other regional tech hubs" we mean large cities other than London such as Birmingham, Manchester, Bristol etc...

Overall do you think the UK's other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.) will grow or decline over the next 5 years, or there will be no difference compared to now? (Please tick the option that BEST applies)

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Grow rapidly	8%	-	-
Grow steadily	38%	17%	29%
No difference	38%	50%	14%
Decline steadily	8%	17%	14%
Decline rapidly	-	-	-
Don't know	8%	17%	43%

Sample Size - 155 Senior Business Decision Makers

Age of Business								
1 year old or less	Over 1 year up to 2 years old	Over 2 years up to 5 years old	Over 5 years up to 10 years old	Over 10 years up to 20 years old	Over 20 years up to 50 years old	Over 50 years old	Don't know	Up to 10 years

Over the next five years, how likely or unlikely do you think your technology business will be to consider expanding or re-locating to another UK region(s) outside of London? (If your business is already considering expanding or relocating to another UK region(s) outside of London, please tick the "Not applicable" option)

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Very likely	-	-	4%	14%	-	-	-	-	8%
Fairly likely	33%	11%	24%	11%	12%	11%	-	-	17%
Fairly unlikely	33%	33%	20%	25%	39%	22%	-	-	25%
Very unlikely	33%	11%	36%	39%	42%	44%	100%	100%	34%
Don't know	-	33%	12%	8%	5%	22%	-	-	12%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	-	11%	4%	3%	2%	-	-	-	4%

For the following questions, by "other regional tech hubs" we mean large cities other than London such as Birmingham, Manchester, Bristol etc...

Overall do you think the UK's other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.) will grow or decline over the next 5 years, or there will be no difference compared to now? (Please tick the option that BEST applies)

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Grow rapidly	-	-	-	8%	2%	-	-	-	4%
Grow steadily	83%	44%	44%	36%	40%	39%	-	-	43%
No difference	17%	22%	40%	33%	37%	33%	100%	50%	33%
Decline steadily	-	22%	8%	3%	12%	11%	-	-	7%
Decline rapidly	-	-	-	-	-	-	-	-	-
Don't know	-	11%	8%	19%	9%	17%	-	50%	13%

Sample Size - 155 Senior Business Decision Makers

Total	Gender		Age					Organisation size	
Base	Male	Female	18-24	25-34	35-44	45-54	55+	Small	Medium

Which, if any, of the following do you think would drive the growth/ expansion of other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.)? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London	155	123	32	2	22	38	43	50	134	21
Rising costs in London (e.g. staffing, property etc.)	56%	59%	44%	-	41%	50%	63%	64%	57%	48%
The higher quality of life in regional hubs (e.g. affordable housing, pace of life etc.)	37%	37%	34%	50%	23%	42%	42%	34%	37%	38%
The greater space and flexibility to expand in regional hubs	29%	28%	31%	-	23%	18%	35%	36%	28%	33%
The established digital infrastructure in regional hubs	17%	20%	9%	-	18%	21%	16%	16%	17%	19%
The exciting, growing communities of tech companies in the regions	17%	15%	22%	-	18%	18%	21%	12%	14%	33%
The ease of recruiting staff in the regions	26%	27%	22%	50%	27%	18%	26%	30%	23%	43%
The ease of retaining staff in the regions	23%	21%	31%	-	5%	16%	33%	30%	22%	33%
The specific technology specialisms and expertise in the regions	15%	15%	16%	-	9%	32%	19%	4%	15%	19%
The culture of innovation, R&D (research and development) and academic success in the regions	21%	22%	19%	-	32%	26%	19%	16%	21%	24%
Government policy and regulations supporting growth in this sector	20%	21%	16%	-	18%	24%	16%	22%	20%	19%
The work of regional business support networks and organisations	19%	20%	16%	50%	41%	13%	21%	10%	16%	33%
None of these	4%	4%	3%	-	-	3%	7%	4%	4%	-
Don't know	10%	7%	22%	-	9%	8%	9%	12%	10%	5%

Which THREE, if any, of the following would be your main requirements for the ideal geographical location for a technology business? (Please tick up to three answers)

Base: Middle managers and above from Tech SMEs in London	155	123	32	2	22	38	43	50	134	21
Community of similar technology companies	18%	20%	9%	50%	14%	16%	12%	26%	19%	10%
Availability of quality office space at the right price	32%	35%	19%	-	27%	21%	37%	38%	32%	29%
Fast broadband and great digital infrastructure	48%	53%	31%	-	41%	42%	51%	56%	49%	43%
Community of funders and investors / access to finance	15%	14%	19%	-	14%	21%	12%	14%	16%	10%
Up and coming staff talent	23%	22%	28%	-	32%	26%	21%	20%	22%	33%
A busy metropolitan lifestyle	14%	14%	13%	50%	5%	26%	9%	10%	13%	14%
Somewhere staff can settle long-term	23%	21%	28%	-	36%	13%	30%	18%	21%	33%
A reputation for innovation and creativity	14%	15%	9%	50%	18%	16%	12%	12%	13%	19%
An experienced local workforce	26%	23%	41%	-	18%	29%	30%	26%	25%	33%
Loyal staff who will stay with the business	21%	21%	19%	-	18%	16%	21%	26%	19%	29%
Other	6%	8%	-	-	5%	5%	7%	8%	7%	-
Don't know	10%	7%	19%	-	5%	11%	9%	12%	10%	5%

Sample Size - 155 Senior Business Decision Makers

Company annual turnover					
First year of trading	Less than £999,999 (NET)	£1 million - £ 9.9 million (NET)	£ 10 million or more (NET)	Don't know	Prefer not to answer

Which, if any, of the following do you think would drive the growth/ expansion of other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.)? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London	3	83	26	17	10	16
Rising costs in London (e.g. staffing, property etc.)	100%	57%	46%	71%	60%	44%
The higher quality of life in regional hubs (e.g. affordable housing, pace of life etc.)	33%	33%	46%	53%	40%	25%
The greater space and flexibility to expand in regional hubs	-	33%	23%	18%	40%	31%
The established digital infrastructure in regional hubs	-	16%	15%	29%	30%	13%
The exciting, growing communities of tech companies in the regions	33%	10%	4%	47%	50%	19%
The ease of recruiting staff in the regions	-	25%	31%	24%	30%	25%
The ease of retaining staff in the regions	-	22%	31%	29%	10%	25%
The specific technology specialisms and expertise in the regions	-	12%	19%	29%	-	25%
The culture of innovation, R&D (research and development) and academic success in the regions	-	18%	23%	41%	30%	13%
Government policy and regulations supporting growth in this sector	67%	18%	19%	24%	20%	19%
The work of regional business support networks and organisations	-	14%	27%	24%	40%	13%
None of these	-	5%	4%	-	-	6%
Don't know	-	12%	4%	-	10%	19%

Which THREE, if any, of the following would be your main requirements for the ideal geographical location for a technology business? (Please tick up to three answers)

Base: Middle managers and above from Tech SMEs in London	3	83	26	17	10	16
Community of similar technology companies	-	13%	23%	35%	10%	25%
Availability of quality office space at the right price	-	33%	27%	35%	30%	38%
Fast broadband and great digital infrastructure	33%	52%	35%	47%	60%	50%
Community of funders and investors / access to finance	67%	16%	8%	12%	20%	13%
Up and coming staff talent	-	24%	19%	35%	30%	13%
A busy metropolitan lifestyle	67%	12%	8%	18%	30%	6%
Somewhere staff can settle long-term	33%	24%	23%	29%	10%	13%
A reputation for innovation and creativity	67%	13%	15%	24%	-	6%
An experienced local workforce	33%	28%	27%	29%	10%	25%
Loyal staff who will stay with the business	-	18%	23%	29%	40%	13%
Other	-	8%	8%	-	-	6%
Don't know	-	11%	4%	-	-	31%

Sample Size - 155 Senior Business Decision Makers

Industry				
Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing

Which, if any, of the following do you think would drive the growth/ expansion of other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.)? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London	24	22	37	9	37
Rising costs in London (e.g. staffing, property etc.)	50%	68%	62%	44%	49%
The higher quality of life in regional hubs (e.g. affordable housing, pace of life etc.)	46%	45%	32%	33%	32%
The greater space and flexibility to expand in regional hubs	38%	45%	30%	33%	24%
The established digital infrastructure in regional hubs	33%	18%	16%	11%	16%
The exciting, growing communities of tech companies in the regions	25%	27%	14%	22%	8%
The ease of recruiting staff in the regions	29%	36%	27%	-	22%
The ease of retaining staff in the regions	25%	32%	24%	11%	16%
The specific technology specialisms and expertise in the regions	13%	9%	22%	22%	19%
The culture of innovation, R&D (research and development) and academic success in the regions	29%	18%	32%	-	14%
Government policy and regulations supporting growth in this sector	17%	27%	24%	22%	19%
The work of regional business support networks and organisations	17%	14%	27%	11%	22%
None of these	4%	-	5%	11%	5%
Don't know	8%	9%	5%	22%	11%

Which THREE, if any, of the following would be your main requirements for the ideal geographical location for a technology business? (Please tick up to three answers)

Base: Middle managers and above from Tech SMEs in London	24	22	37	9	37
Community of similar technology companies	25%	18%	16%	22%	16%
Availability of quality office space at the right price	38%	32%	35%	33%	24%
Fast broadband and great digital infrastructure	67%	36%	54%	33%	41%
Community of funders and investors / access to finance	8%	27%	16%	22%	8%
Up and coming staff talent	29%	27%	16%	-	22%
A busy metropolitan lifestyle	8%	14%	14%	33%	5%
Somewhere staff can settle long-term	38%	23%	16%	22%	22%
A reputation for innovation and creativity	8%	23%	22%	-	14%
An experienced local workforce	17%	32%	27%	22%	32%
Loyal staff who will stay with the business	21%	27%	16%	11%	19%
Other	8%	5%	8%	-	8%
Don't know	4%	9%	8%	33%	11%

Sample Size - 155 Senior Business Decision Makers

Internet/ Web Development	Telecommunications	Other Technology Services industry
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Which, if any, of the following do you think would drive the growth/ expansion of other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.)? (Please tick all that apply)

Base: Middle managers and above from Tech SMEs in London	13	6	7
Rising costs in London (e.g. staffing, property etc.)	62%	50%	57%
The higher quality of life in regional hubs (e.g. affordable housing, pace of life etc.)	46%	33%	14%
The greater space and flexibility to expand in regional hubs	23%	-	-
The established digital infrastructure in regional hubs	-	33%	-
The exciting, growing communities of tech companies in the regions	31%	-	-
The ease of recruiting staff in the regions	31%	17%	29%
The ease of retaining staff in the regions	31%	17%	29%
The specific technology specialisms and expertise in the regions	-	17%	14%
The culture of innovation, R&D (research and development) and academic success in the regions	31%	-	14%
Government policy and regulations supporting growth in this sector	15%	17%	-
The work of regional business support networks and organisations	23%	-	-
None of these	-	-	-
Don't know	15%	-	14%

Which THREE, if any, of the following would be your main requirements for the ideal geographical location for a technology business? (Please tick up to three answers)

Base: Middle managers and above from Tech SMEs in London	13	6	7
Community of similar technology companies	15%	17%	14%
Availability of quality office space at the right price	31%	-	57%
Fast broadband and great digital infrastructure	46%	67%	43%
Community of funders and investors / access to finance	8%	17%	29%
Up and coming staff talent	54%	17%	14%
A busy metropolitan lifestyle	23%	33%	14%
Somewhere staff can settle long-term	15%	33%	14%
A reputation for innovation and creativity	8%	-	14%
An experienced local workforce	31%	-	29%
Loyal staff who will stay with the business	23%	17%	43%
Other	-	17%	-
Don't know	8%	17%	-

Sample Size - 155 Senior Business Decision Makers

Age of Business								
1 year old or less	Over 1 year up to 2 years old	Over 2 years up to 5 years old	Over 5 years up to 10 years old	Over 10 years up to 20 years old	Over 20 years up to 50 years old	Over 50 years old	Don't know	Up to 10 years

Which, if any, of the following do you think would drive the growth/ expansion of other regional tech hubs (e.g. Birmingham, Manchester, Bristol etc.)? (Please tick all that apply)

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Rising costs in London (e.g. staffing, property etc.)	67%	56%	56%	33%	67%	67%	50%	50%	46%
The higher quality of life in regional hubs (e.g. affordable housing, pace of life etc.)	17%	22%	44%	31%	39%	50%	50%	-	33%
The greater space and flexibility to expand in regional hubs	17%	-	40%	25%	28%	44%	50%	-	26%
The established digital infrastructure in regional hubs	33%	22%	12%	8%	25%	11%	50%	-	13%
The exciting, growing communities of tech companies in the regions	33%	22%	20%	19%	14%	11%	-	-	21%
The ease of recruiting staff in the regions	-	11%	36%	28%	26%	22%	-	50%	26%
The ease of retaining staff in the regions	-	22%	32%	19%	21%	39%	-	-	22%
The specific technology specialisms and expertise in the regions	-	22%	12%	14%	21%	11%	-	-	13%
The culture of innovation, R&D (research and development) and academic success in the regions	-	11%	28%	25%	23%	11%	50%	-	22%
Government policy and regulations supporting growth in this sector	33%	11%	8%	17%	19%	44%	50%	-	14%
The work of regional business support networks and organisations	33%	-	16%	22%	21%	17%	-	-	18%
None of these	-	-	8%	-	5%	6%	-	-	3%
Don't know	-	11%	12%	11%	7%	6%	50%	50%	11%

Which THREE, if any, of the following would be your main requirements for the ideal geographical location for a technology business? (Please tick up to three answers)

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Community of similar technology companies	17%	33%	8%	19%	25%	6%	-	-	17%
Availability of quality office space at the right price	17%	22%	32%	22%	39%	39%	50%	-	25%
Fast broadband and great digital infrastructure	33%	44%	56%	36%	60%	33%	50%	50%	43%
Community of funders and investors / access to finance	33%	11%	24%	11%	12%	6%	50%	50%	17%
Up and coming staff talent	17%	11%	20%	28%	19%	39%	-	50%	22%
A busy metropolitan lifestyle	33%	11%	16%	19%	11%	6%	-	-	18%
Somewhere staff can settle long-term	33%	11%	24%	17%	23%	33%	50%	-	20%
A reputation for innovation and creativity	50%	11%	8%	19%	11%	11%	-	50%	17%
An experienced local workforce	33%	44%	16%	25%	25%	33%	50%	50%	25%
Loyal staff who will stay with the business	-	-	12%	14%	25%	44%	50%	50%	11%
Other	-	-	12%	8%	5%	6%	-	-	8%
Don't know	-	22%	12%	8%	11%	6%	-	-	11%

Sample Size - 155 Senior Business Decision Makers

Total	Gender		Age					Organisation size	
Base	Male	Female	18-24	25-34	35-44	45-54	55+	Small	Medium

To what extent do you agree or disagree with each of the following statements? (Please tick one option on each row)

'The UK would benefit from having bigger, stronger technology hubs outside of London' :

**Base: Middle managers and above from Tech SMEs in London**

	155	123	32	2	22	38	43	50	134	21
Strongly agree	19%	20%	16%	-	27%	11%	26%	16%	17%	29%
Tend to agree	43%	40%	53%	50%	36%	34%	42%	52%	43%	43%
Neither agree nor disagree	25%	27%	16%	50%	23%	37%	23%	16%	25%	24%
Tend to disagree	9%	10%	6%	-	9%	16%	5%	8%	10%	-
Strongly disagree	1%	1%	3%	-	-	-	2%	2%	1%	-
Don't know	4%	3%	6%	-	5%	3%	2%	6%	4%	5%

Government policy for the digital economy is too focused on "Tech City" (i.e. East London) :

**Base: Middle managers and above from Tech SMEs in London**

	155	123	32	2	22	38	43	50	134	21
Strongly agree	9%	10%	6%	50%	18%	5%	12%	4%	7%	19%
Tend to agree	35%	36%	34%	-	36%	26%	37%	42%	35%	38%
Neither agree nor disagree	30%	28%	38%	50%	27%	32%	33%	26%	31%	19%
Tend to disagree	14%	15%	9%	-	9%	26%	5%	16%	15%	10%
Strongly disagree	3%	2%	3%	-	5%	3%	2%	2%	2%	5%
Don't know	9%	9%	9%	-	5%	8%	12%	10%	9%	10%

Sample Size - 155 Senior Business Decision Makers

Company annual turnover					
First year of trading	Less than £999,999 (NET)	£1 million - £ 9.9 million (NET)	£ 10 million or more (NET)	Don't know	Prefer not to answer

To what extent do you agree or disagree with each of the following statements? (Please tick one option on each row)

'The UK would benefit from having bigger, stronger technology hubs outside of London' :

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Strongly agree	-	17%	23%	24%	-	31%
Tend to agree	67%	43%	35%	53%	50%	31%
Neither agree nor disagree	-	24%	27%	18%	50%	19%
Tend to disagree	33%	10%	12%	6%	-	6%
Strongly disagree	-	-	4%	-	-	6%
Don't know	-	6%	-	-	-	6%

Government policy for the digital economy is too focused on "Tech City" (i.e. East London) :

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Strongly agree	-	7%	12%	18%	-	13%
Tend to agree	67%	34%	35%	41%	50%	25%
Neither agree nor disagree	33%	28%	35%	18%	30%	44%
Tend to disagree	-	16%	19%	12%	10%	6%
Strongly disagree	-	4%	-	6%	-	-
Don't know	-	12%	-	6%	10%	13%

Industry				
Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing

To what extent do you agree or disagree with each of the following statements? (Please tick one option on each row)

'The UK would benefit from having bigger, stronger technology hubs outside of London' :

**Base: Middle managers and above from Tech SMEs in London**

	24	22	37	9	37
Strongly agree	13%	18%	27%	22%	14%
Tend to agree	42%	45%	49%	33%	30%
Neither agree nor disagree	25%	23%	19%	22%	38%
Tend to disagree	8%	9%	5%	22%	11%
Strongly disagree	-	-	-	-	5%
Don't know	13%	5%	-	-	3%

Government policy for the digital economy is too focused on "Tech City" (i.e. East London) :

**Base: Middle managers and above from Tech SMEs in London**

	24	22	37	9	37
Strongly agree	4%	5%	8%	11%	8%
Tend to agree	42%	27%	32%	33%	43%
Neither agree nor disagree	17%	36%	32%	33%	30%
Tend to disagree	21%	14%	19%	11%	11%
Strongly disagree	-	9%	3%	-	-
Don't know	17%	9%	5%	11%	8%

Sample Size - 155 Senior Business Decision Makers

Internet/ Web Development	Telecommunications	Other Technology Services industry
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To what extent do you agree or disagree with each of the following statements? (Please tick one option on each row)

'The UK would benefit from having bigger, stronger technology hubs outside of London' :

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Strongly agree	15%	17%	29%
Tend to agree	69%	33%	43%
Neither agree nor disagree	8%	33%	14%
Tend to disagree	-	17%	14%
Strongly disagree	-	-	-
Don't know	8%	-	-

Government policy for the digital economy is too focused on "Tech City" (i.e. East London) :

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Strongly agree	23%	33%	-
Tend to agree	15%	33%	57%
Neither agree nor disagree	38%	17%	29%
Tend to disagree	15%	-	-
Strongly disagree	-	17%	-
Don't know	8%	-	14%

Sample Size - 155 Senior Business Decision Makers

Age of Business								
1 year old or less	Over 1 year up to 2 years old	Over 2 years up to 5 years old	Over 5 years up to 10 years old	Over 10 years up to 20 years old	Over 20 years up to 50 years old	Over 50 years old	Don't know	Up to 10 years

To what extent do you agree or disagree with each of the following statements? (Please tick one option on each row)

'The UK would benefit from having bigger, stronger technology hubs outside of London' :

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Strongly agree	-	22%	20%	14%	19%	33%	-	-	16%
Tend to agree	67%	22%	40%	44%	39%	61%	-	50%	42%
Neither agree nor disagree	-	44%	28%	25%	28%	-	100%	-	26%
Tend to disagree	33%	11%	8%	8%	9%	6%	-	-	11%
Strongly disagree	-	-	-	3%	2%	-	-	-	1%
Don't know	-	-	4%	6%	4%	-	-	50%	4%

Government policy for the digital economy is too focused on "Tech City" (i.e. East London) :

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Strongly agree	-	11%	4%	11%	9%	17%	-	-	8%
Tend to agree	33%	22%	48%	33%	33%	28%	100%	50%	37%
Neither agree nor disagree	50%	44%	24%	25%	30%	39%	-	-	29%
Tend to disagree	-	11%	16%	17%	18%	6%	-	-	14%
Strongly disagree	17%	-	-	3%	2%	6%	-	-	3%
Don't know	-	11%	8%	11%	9%	6%	-	50%	9%

**YouGov / Portland Communications**  
**Fieldwork - October 2013**

Sample Size - 155 Senior Business Decision Makers



Total	Gender		Age					Organisation size	
Base	Male	Female	18-24	25-34	35-44	45-54	55+	Small	Medium

Over the next 5 years, London's technology boom will be replicated in other UK regions' :

**Base: Middle managers and above from Tech SMEs in London**

	155	123	32	2	22	38	43	50	134	21
Strongly agree	3%	2%	3%	-	14%	-	2%	-	2%	5%
Tend to agree	31%	28%	41%	-	18%	26%	40%	34%	26%	62%
Neither agree nor disagree	30%	28%	38%	50%	32%	21%	35%	30%	33%	10%
Tend to disagree	25%	28%	16%	50%	23%	42%	12%	24%	28%	5%
Strongly disagree	6%	8%	-	-	9%	8%	7%	4%	6%	10%
Don't know	5%	6%	3%	-	5%	3%	5%	8%	4%	10%

Over the next five years, the UK is likely to produce a technology to rival large global technology companies like Google, Twitter or Facebook' :

**Base: Middle managers and above from Tech SMEs in London**

	155	123	32	2	22	38	43	50	134	21
Strongly agree	5%	5%	3%	-	14%	5%	2%	2%	2%	19%
Tend to agree	15%	13%	22%	50%	18%	13%	12%	16%	13%	24%
Neither agree nor disagree	26%	23%	41%	50%	36%	13%	35%	24%	28%	14%
Tend to disagree	33%	35%	25%	-	27%	39%	23%	40%	34%	24%
Strongly disagree	15%	17%	6%	-	-	26%	16%	12%	15%	14%
Don't know	6%	7%	3%	-	5%	3%	12%	6%	7%	5%

Sample Size - 155 Senior Business Decision Makers

Company annual turnover					
First year of trading	Less than £999,999 (NET)	£1 million - £ 9.9 million (NET)	£ 10 million or more (NET)	Don't know	Prefer not to answer

Over the next 5 years, London's technology boom will be replicated in other UK regions' :

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Strongly agree	-	4%	-	6%	-	-
Tend to agree	-	30%	38%	47%	30%	13%
Neither agree nor disagree	67%	28%	23%	24%	50%	38%
Tend to disagree	33%	28%	31%	12%	10%	25%
Strongly disagree	-	5%	8%	6%	10%	13%
Don't know	-	6%	-	6%	-	13%

Over the next five years, the UK is likely to produce a technology to rival large global technology companies like Google, Twitter or Facebook' :

**Base: Middle managers and above from Tech SMEs in London**

	3	83	26	17	10	16
Strongly agree	33%	2%	4%	18%	-	-
Tend to agree	-	12%	23%	24%	20%	6%
Neither agree nor disagree	33%	25%	31%	18%	40%	25%
Tend to disagree	-	37%	31%	24%	30%	31%
Strongly disagree	33%	14%	12%	18%	10%	19%
Don't know	-	8%	-	-	-	19%

**YouGov / Portland Communications  
Fieldwork - October 2013**

Sample Size - 155 Senior Business Decision Makers

Industry				
Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing

Over the next 5 years, London's technology boom will be replicated in other UK regions' :

**Base: Middle managers and above from Tech SMEs in London**

	24	22	37	9	37
Strongly agree	-	-	5%	-	3%
Tend to agree	33%	41%	35%	33%	24%
Neither agree nor disagree	29%	23%	30%	44%	24%
Tend to disagree	21%	32%	24%	22%	35%
Strongly disagree	4%	5%	3%	-	11%
Don't know	13%	-	3%	-	3%

Over the next five years, the UK is likely to produce a technology to rival large global technology companies like Google, Twitter or Facebook' :

**Base: Middle managers and above from Tech SMEs in London**

	24	22	37	9	37
Strongly agree	-	-	3%	11%	5%
Tend to agree	13%	18%	16%	22%	14%
Neither agree nor disagree	17%	36%	43%	22%	16%
Tend to disagree	42%	41%	19%	33%	43%
Strongly disagree	21%	5%	8%	11%	19%
Don't know	8%	-	11%	-	3%

**YouGov / Portland Communications  
Fieldwork - October 2013**

Sample Size - 155 Senior Business Decision Makers

Internet/ Web Development	Telecommunications	Other Technology Services industry
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Over the next 5 years, London's technology boom will be replicated in other UK regions' :

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Strongly agree	8%	-	-
Tend to agree	31%	17%	14%
Neither agree nor disagree	38%	33%	43%
Tend to disagree	-	33%	14%
Strongly disagree	15%	17%	-
Don't know	8%	-	29%

Over the next five years, the UK is likely to produce a technology to rival large global technology companies like Google, Twitter or Facebook' :

**Base: Middle managers and above from Tech SMEs in London**

	13	6	7
Strongly agree	8%	17%	14%
Tend to agree	15%	17%	-
Neither agree nor disagree	23%	17%	14%
Tend to disagree	23%	17%	29%
Strongly disagree	23%	33%	14%
Don't know	8%	-	29%

Sample Size - 155 Senior Business Decision Makers

Age of Business								
1 year old or less	Over 1 year up to 2 years old	Over 2 years up to 5 years old	Over 5 years up to 10 years old	Over 10 years up to 20 years old	Over 20 years up to 50 years old	Over 50 years old	Don't know	Up to 10 years

Over the next 5 years, London's technology boom will be replicated in other UK regions' :

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Strongly agree	17%	-	-	3%	4%	-	-	-	3%
Tend to agree	17%	11%	36%	44%	25%	33%	50%	-	36%
Neither agree nor disagree	33%	33%	28%	25%	26%	50%	50%	-	28%
Tend to disagree	33%	44%	24%	22%	26%	11%	-	100%	26%
Strongly disagree	-	11%	4%	3%	11%	6%	-	-	4%
Don't know	-	-	8%	3%	9%	-	-	-	4%

Over the next five years, the UK is likely to produce a technology to rival large global technology companies like Google, Twitter or Facebook' :

**Base: Middle managers and above from Tech SMEs in London**

	6	9	25	36	57	18	2	2	76
Strongly agree	33%	-	-	11%	2%	-	-	-	8%
Tend to agree	-	-	12%	25%	11%	11%	100%	50%	16%
Neither agree nor disagree	17%	33%	24%	19%	26%	50%	-	-	22%
Tend to disagree	33%	56%	36%	33%	35%	11%	-	50%	37%
Strongly disagree	17%	11%	20%	8%	19%	11%	-	-	13%
Don't know	-	-	8%	3%	7%	17%	-	-	4%