

YouGov / Finn Partners

Sample Size: 799 senior decision makers from small businesses (up to 49 employees)

Fieldwork: 2nd - 6th February 2015

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

Which, if any, of the following do you feel currently holds your business back from your closest competitors in terms of profitability? (Please select all that apply)

	Unweighted base	Male	Female	18-24	25-34	35-44	45-54	55+
Unweighted base	799	568	231	3	56	121	217	402
Base: All senior decision makers	799	572	227	3	57	126	218	394
Cost effective technology solutions	8%	9%	6%	46%	15%	8%	10%	5%
Being able to find appropriately skilled staff	14%	13%	15%	-	20%	24%	15%	9%
Office location	5%	4%	7%	-	7%	6%	6%	3%
Work incentives (e.g. pensions scheme, gym membership, etc.)	2%	2%	2%	-	9%	4%	1%	1%
Price increases and inflation	15%	14%	18%	24%	16%	11%	17%	15%
Regulatory pressures	11%	12%	11%	-	11%	6%	12%	13%
Size of business	27%	26%	31%	46%	37%	27%	23%	28%
Other	12%	12%	11%	-	8%	13%	12%	12%
Don't know	6%	6%	5%	30%	7%	7%	8%	3%
Not applicable - I don't think anything holds us back from our closest competitors	32%	33%	29%	-	26%	23%	30%	37%

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Work industry (short list)												
Manufacturing	Construction	Retail	Finance and Accounting	Hospitality and leisure	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other

Which, if any, of the following do you feel currently holds your business back from your closest competitors in terms of profitability? (Please select all that apply)

	Manufacturing	Construction	Retail	Finance and Accounting	Hospitality and leisure	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other
Unweighted base	69	102	65	53	72	51	86	97	24	30	19	21	110
Base: All senior decision makers	71	103	64	52	68	51	87	96	25	30	20	20	110
Cost effective technology solutions	10%	3%	7%	3%	10%	13%	12%	9%	-	8%	5%	12%	7%
Being able to find appropriately skilled staff	18%	15%	3%	15%	5%	14%	26%	13%	19%	5%	24%	15%	12%
Office location	8%	4%	6%	4%	4%	5%	6%	6%	-	-	-	6%	4%
Work incentives (e.g. pensions scheme, gym membership, etc.)	5%	3%	2%	-	-	4%	3%	3%	-	-	6%	-	2%
Price increases and inflation	31%	18%	23%	1%	19%	8%	13%	10%	-	3%	27%	16%	14%
Regulatory pressures	9%	13%	13%	28%	10%	19%	8%	2%	16%	15%	19%	13%	7%
Size of business	27%	21%	37%	15%	24%	26%	30%	30%	33%	29%	17%	11%	35%
Other	6%	13%	15%	15%	12%	12%	10%	16%	6%	12%	5%	19%	12%
Don't know	4%	11%	5%	4%	6%	8%	5%	7%	4%	-	5%	6%	3%
Not applicable - I don't think anything holds us back from our closest competitors	20%	30%	24%	30%	43%	31%	34%	30%	37%	41%	33%	37%	36%

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Fieldwork: 2nd - 6th February 2015

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 feel currently holds your business back from your closest competitors in terms of profitability? (Please select all that apply)

	Unweighted base	32	534	163	19	19	32
Base: All senior decision makers		30	517	181	20	20	32
Cost effective technology solutions		3%	8%	9%	20%	4%	6%
Being able to find appropriately skilled staff		3%	11%	24%	22%	10%	7%
Office location		3%	5%	4%	4%	6%	2%
Work incentives (e.g. pensions scheme, gym membership, etc.)		-	2%	4%	-	-	4%
Price increases and inflation		19%	14%	17%	11%	12%	19%
Regulatory pressures		3%	12%	11%	11%	4%	10%
Size of business		40%	28%	27%	16%	6%	29%
Other		10%	13%	10%	11%	6%	10%
Don't know		3%	5%	4%	5%	29%	8%
Not applicable - I don't think anything holds us back from our closest competitors		31%	32%	31%	15%	42%	33%

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Fieldwork: 2nd - 6th February 2015

Where in Britain do you MAINLY work?											
North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)

Which, if any, of the following do you feel currently holds your business back from your closest competitors in terms of profitability? (Please select all that apply)

	North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
Unweighted base	25	69	58	61	45	58	145	147	80	26	78	7
Base: All senior decision makers	26	69	60	58	45	57	147	147	78	25	79	7
Cost effective technology solutions	9%	10%	11%	5%	11%	5%	8%	9%	3%	7%	8%	-
Being able to find appropriately skilled staff	22%	12%	12%	21%	14%	10%	20%	16%	4%	-	11%	15%
Office location	4%	5%	14%	6%	4%	8%	4%	3%	1%	-	4%	13%
Work incentives (e.g. pensions scheme, gym membership, etc.)	8%	-	6%	4%	-	-	3%	3%	-	-	1%	-
Price increases and inflation	23%	23%	15%	19%	8%	18%	8%	15%	12%	9%	23%	-
Regulatory pressures	20%	17%	12%	9%	11%	11%	8%	11%	11%	7%	12%	33%
Size of business	34%	26%	22%	21%	34%	34%	20%	32%	30%	28%	27%	39%
Other	7%	8%	11%	12%	3%	11%	16%	14%	7%	14%	18%	-
Don't know	4%	4%	6%	9%	2%	3%	9%	8%	2%	-	4%	-
Not applicable - I don't think anything holds us back from our closest competitors	27%	34%	35%	23%	45%	34%	32%	23%	43%	52%	27%	26%

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Fieldwork: 2nd - 6th February 2015

Region mainly work							
North	Midlands	East	London	South	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)

Which, if any, of the following do you feel currently holds your business back from your closest competitors in terms of profitability? (Please select all that apply)

	Unweighted base	North	Midlands	East	London	South	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
Unweighted base	152	106	58	145	227	26	78	7	
Base: All senior decision makers	154	104	57	147	225	25	79	7	
Cost effective technology solutions	10%	8%	5%	8%	7%	7%	8%	-	
Being able to find appropriately skilled staff	14%	18%	10%	20%	12%	-	11%	15%	
Office location	8%	5%	8%	4%	2%	-	4%	13%	
Work incentives (e.g. pensions scheme, gym membership, etc.)	4%	2%	-	3%	2%	-	1%	-	
Price increases and inflation	20%	14%	18%	8%	14%	9%	23%	-	
Regulatory pressures	16%	10%	11%	8%	11%	7%	12%	33%	
Size of business	26%	27%	34%	20%	31%	28%	27%	39%	
Other	9%	8%	11%	16%	12%	14%	18%	-	
Don't know	5%	6%	3%	9%	6%	-	4%	-	
Not applicable - I don't think anything holds us back from our closest competitors	33%	33%	34%	32%	30%	52%	27%	26%	

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

For the following question, please bear this definition in mind: Voice over IP (VoIP) is a methodology and group of technologies that allow you to make phone calls using your broadband connection with no need for traditional phone connection. Other terms commonly associated with VoIP are IP telephony, Internet telephony, broadband telephony, and broadband phone service (i.e. Skype, Google Talk, etc.)

Do you/ anyone else use VoIP or similar hosted IT solutions in the business you own/ work for?

	Unweighted base	799	568	231	3	56	121	217	402
Base: All senior decision makers		799	572	227	3	57	126	218	394
Yes, I/ we do		33%	35%	29%	30%	49%	34%	31%	32%
No, I/ we don't		64%	62%	68%	70%	46%	60%	65%	66%
Don't know		3%	4%	3%	-	5%	5%	4%	2%

You said that you don't (or no-one else uses) Voice over IP (VoIP) or similar hosted IT solutions in the business you own/ work for. Which, if any, of the following are the reasons for this? (Please select all that apply)

	Unweighted base	513	355	158	2	27	74	142	268
Base: All senior decision makers who do NOT use VoIP or similar solutions		508	353	155	2	26	76	142	262
I'm not aware how it can help businesses like mine		23%	24%	23%	-	26%	25%	22%	23%
I don't see what the benefits are		22%	21%	22%	65%	23%	23%	23%	20%
I don't think it will save me money		8%	10%	5%	-	3%	5%	10%	9%
My customers might not like the thought of it		5%	6%	3%	-	5%	6%	3%	5%
I think it would be complicated to set up		2%	2%	3%	-	3%	1%	2%	3%
I would be worried about how secure it would be		3%	3%	4%	-	5%	-	5%	3%
I would be concerned about having an unreliable internet connection		12%	13%	11%	-	-	13%	10%	15%
Other		14%	14%	16%	-	15%	18%	14%	14%
Don't know		10%	8%	13%	35%	21%	10%	11%	8%

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Work industry (short list)												
Manufacturing	Construction	Retail	Finance and Accounting	Hospitality and leisure	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other

For the following question, please bear this definition in mind: Voice over IP (VoIP) is a methodology and group of technologies that allow you to make phone calls using your broadband connection with no need for traditional phone connection. Other terms commonly associated with VoIP are IP telephony, Internet telephony, broadband telephony, and broadband phone service (i.e. Skype, Google Talk, etc.)

Do you/ anyone else use VoIP or similar hosted IT solutions in the business you own/ work for?

	Manufacturing	Construction	Retail	Finance and Accounting	Hospitality and leisure	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other
Unweighted base	69	102	65	53	72	51	86	97	24	30	19	21	110
Base: All senior decision makers	71	103	64	52	68	51	87	96	25	30	20	20	110
Yes, I/ we do	27%	14%	17%	38%	21%	33%	70%	43%	26%	30%	31%	31%	35%
No, I/ we don't	72%	83%	82%	60%	76%	57%	28%	53%	74%	67%	59%	69%	61%
Don't know	2%	3%	2%	2%	2%	10%	2%	4%	-	3%	11%	-	4%

You said that you don't (or no-one else uses) Voice over IP (VoIP) or similar hosted IT solutions in the business you own/ work for. Which, if any, of the following are the reasons for this? (Please select all that apply)

	Manufacturing	Construction	Retail	Finance and Accounting	Hospitality and leisure	Legal	IT & telecoms	Media/ marketing/ advertising/ PR & sales	Medical & health services	Education	Transportation & distribution	Real estate	Other
Unweighted base	49	85	54	32	56	29	25	52	18	20	11	14	68
Base: All senior decision makers who do NOT use VoIP or similar solutions	51	85	52	31	52	29	24	51	19	20	12	14	68
I'm not aware how it can help businesses like mine	24%	21%	30%	24%	28%	17%	22%	23%	27%	19%	28%	27%	20%
I don't see what the benefits are	24%	24%	26%	17%	20%	19%	30%	17%	20%	35%	-	15%	21%
I don't think it will save me money	6%	5%	6%	6%	5%	18%	19%	13%	5%	5%	9%	23%	5%
My customers might not like the thought of it	10%	2%	-	9%	8%	-	3%	8%	4%	15%	-	-	2%
I think it would be complicated to set up	-	3%	1%	9%	3%	3%	-	-	-	7%	12%	-	1%
I would be worried about how secure it would be	2%	6%	-	-	2%	7%	5%	2%	-	-	18%	-	3%
I would be concerned about having an unreliable internet connection	14%	12%	7%	23%	11%	17%	4%	11%	9%	-	15%	18%	16%
Other	7%	16%	10%	11%	15%	10%	8%	18%	23%	13%	10%	12%	22%
Don't know	12%	10%	20%	-	8%	8%	8%	8%	12%	5%	8%	5%	10%

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Company annual turnover					
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For the following question, please bear this definition in mind: Voice over IP (VoIP) is a methodology and group of technologies that allow you to make phone calls using your broadband connection with no need for traditional phone connection. Other terms commonly associated with VoIP are IP telephony, Internet telephony, broadband telephony, and broadband phone service (i.e. Skype, Google Talk, etc.)

Do you/ anyone else use VoIP or similar hosted IT solutions in the business you own/ work for?

	Unweighted base	32	534	163	19	19	32
Base: All senior decision makers		30	517	181	20	20	32
Yes, I/ we do	40%	28%	43%	62%	30%	34%	
No, I/ we don't	57%	69%	54%	33%	58%	57%	
Don't know	3%	3%	3%	5%	13%	9%	

You said that you don't (or no-one else uses) Voice over IP (VoIP) or similar hosted IT solutions in the business you own/ work for. Which, if any, of the following are the reasons for this? (Please select all that apply)

	Unweighted base	18	371	88	6	12	18
Base: All senior decision makers who do NOT use VoIP or similar solutions		17	358	97	7	11	18
I'm not aware how it can help businesses like mine	39%	23%	23%	50%	20%	10%	
I don't see what the benefits are	11%	23%	18%	17%	32%	25%	
I don't think it will save me money	11%	8%	10%	-	8%	-	
My customers might not like the thought of it	6%	5%	5%	-	7%	-	
I think it would be complicated to set up	-	3%	3%	-	-	-	
I would be worried about how secure it would be	11%	2%	7%	-	10%	-	
I would be concerned about having an unreliable internet connection	-	12%	15%	-	-	22%	
Other	22%	16%	7%	33%	-	22%	
Don't know	-	8%	13%	-	23%	21%	

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Where in Britain do you MAINLY work?											
North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)

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Do you/ anyone else use VoIP or similar hosted IT solutions in the business you own/ work for?

	North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
Unweighted base	25	69	58	61	45	58	145	147	80	26	78	7
Base: All senior decision makers	26	69	60	58	45	57	147	147	78	25	79	7
Yes, I/ we do	42%	34%	32%	29%	36%	37%	41%	31%	24%	34%	24%	72%
No, I/ we don't	58%	64%	68%	68%	60%	56%	54%	66%	76%	54%	73%	28%
Don't know	-	2%	-	3%	4%	7%	5%	3%	1%	13%	3%	-

You said that you don't (or no-one else uses) Voice over IP (VoIP) or similar hosted IT solutions in the business you own/ work for. Which, if any, of the following are the reasons for this? (Please select all that apply)

	North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
Unweighted base	15	45	40	41	28	33	78	99	60	14	58	2
Base: All senior decision makers who do NOT use VoIP or similar solutions	15	44	41	40	27	32	79	98	59	14	58	2
I'm not aware how it can help businesses like mine	12%	17%	23%	27%	26%	15%	21%	26%	34%	52%	15%	-
I don't see what the benefits are	28%	30%	18%	13%	9%	27%	27%	17%	22%	18%	29%	-
I don't think it will save me money	-	5%	5%	14%	17%	12%	7%	12%	4%	7%	5%	-
My customers might not like the thought of it	6%	-	3%	9%	6%	2%	4%	5%	9%	-	5%	-
I think it would be complicated to set up	-	2%	2%	-	7%	-	2%	7%	-	-	-	-
I would be worried about how secure it would be	-	5%	-	5%	4%	-	2%	3%	-	-	8%	53%
I would be concerned about having an unreliable internet connection	23%	6%	12%	11%	12%	29%	11%	12%	10%	7%	12%	-
Other	5%	19%	26%	17%	13%	2%	17%	8%	17%	7%	15%	47%
Don't know	27%	15%	11%	4%	6%	12%	8%	9%	6%	9%	12%	-

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Do you/ anyone else use VoIP or similar hosted IT solutions in the business you own/ work for?

	North	Midlands	East	London	South	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
Unweighted base	152	106	58	145	227	26	78	7
Base: All senior decision makers	154	104	57	147	225	25	79	7
Yes, I/ we do	34%	32%	37%	41%	28%	34%	24%	72%
No, I/ we don't	65%	65%	56%	54%	70%	54%	73%	28%
Don't know	1%	4%	7%	5%	2%	13%	3%	-

You said that you don't (or no-one else uses) Voice over IP (VoIP) or similar hosted IT solutions in the business you own/ work for. Which, if any, of the following are the reasons for this? (Please select all that apply)

	North	Midlands	East	London	South	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
Unweighted base	100	69	33	78	159	14	58	2
Base: All senior decision makers who do NOT use VoIP or similar solutions	100	67	32	79	157	14	58	2
I'm not aware how it can help businesses like mine	19%	27%	15%	21%	29%	52%	15%	-
I don't see what the benefits are	25%	11%	27%	27%	19%	18%	29%	-
I don't think it will save me money	4%	15%	12%	7%	9%	7%	5%	-
My customers might not like the thought of it	2%	8%	2%	4%	6%	-	5%	-
I think it would be complicated to set up	2%	3%	-	2%	4%	-	-	-
I would be worried about how secure it would be	2%	5%	-	2%	2%	-	8%	53%
I would be concerned about having an unreliable internet connection	11%	12%	29%	11%	11%	7%	12%	-
Other	20%	15%	2%	17%	12%	7%	15%	47%
Don't know	15%	5%	12%	8%	8%	9%	12%	-