

YouGov / Portland Communications Survey

Sample size: 155 managers at Tech SMEs
Fieldwork: 11th - 17th October 2013

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

BPB_q1. 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%

YouGov / Portland Communications Surve

Sample size: 155 managers at Tech SMEs
Fieldwork: 11th - 17th October 2013

Total	Company annual turnover					
Base	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

BPB_q1. 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	3	83	26	17	10	16
Lack of access to second stage funding or investment	22%	100%	16%	19%	47%	30%	13%
Lack of high quality office space at the right price	25%	-	24%	35%	24%	30%	19%
High staff turnover	14%	-	11%	23%	35%	10%	-
Lack of available, suitably qualified/ experienced staff	24%	-	20%	31%	41%	30%	13%
The cost of running a business (i.e. staff and operational expenses)	48%	67%	41%	58%	59%	60%	44%
Lack of a supportive local business community	18%	-	18%	8%	35%	30%	13%
Limited access to clients	25%	33%	28%	23%	29%	30%	-
London's digital infrastructure not being strong enough	10%	-	7%	12%	18%	-	25%
Other (Please see tab Q1 Other)	9%	-	13%	8%	6%	-	-
Don't know	6%	-	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%	-	10%	4%	12%	-	31%

YouGov / Portland Communications Surve

Sample size: 155 managers at Tech SMEs
Fieldwork: 11th - 17th October 2013

Total	Industry							
Base	Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing	Internet/ Web Development	Telecommunications	Other Technology Services industry

BPB_q1. 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	24	22	37	9	37	13	6	7
Lack of access to second stage funding or investment	22%	29%	14%	27%	33%	24%	8%	-	14%
Lack of high quality office space at the right price	25%	29%	27%	30%	22%	24%	8%	17%	29%
High staff turnover	14%	8%	9%	14%	11%	22%	31%	-	-
Lack of available, suitably qualified/ experienced staff	24%	17%	18%	38%	22%	16%	23%	17%	43%
The cost of running a business (i.e. staff and operational expenses)	48%	42%	50%	59%	33%	49%	38%	33%	43%
Lack of a supportive local business community	18%	8%	18%	19%	11%	24%	-	50%	29%
Limited access to clients	25%	17%	9%	19%	22%	49%	15%	17%	29%
London's digital infrastructure not being strong enough	10%	25%	9%	5%	-	8%	8%	17%	14%
Other (Please see tab Q1 Other)	9%	13%	9%	11%	11%	3%	-	17%	29%
Don't know	6%	-	18%	3%	11%	3%	15%	-	-
Not applicable – I do not think that there are any barriers for small technology companies in London that want to expand/ grow	10%	8%	9%	5%	22%	11%	31%	-	-

YouGov / Portland Communications Surve

Sample size: 155 managers at Tech SMEs
Fieldwork: 11th - 17th October 2013

Total	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

BPB_q1. 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	6	9	25	36	57	18	2	2	76
Lack of access to second stage funding or investment	22%	50%	11%	16%	22%	19%	22%	100%	50%	21%
Lack of high quality office space at the right price	25%	17%	22%	24%	14%	33%	22%	50%	50%	18%
High staff turnover	14%	-	-	20%	14%	16%	17%	-	-	13%
Lack of available, suitably qualified/ experienced staff	24%	-	33%	28%	19%	25%	33%	-	-	22%
The cost of running a business (i.e. staff and operational expenses)	48%	67%	44%	44%	39%	51%	50%	100%	50%	43%
Lack of a supportive local business community	18%	17%	44%	8%	11%	21%	22%	50%	-	14%
Limited access to clients	25%	17%	33%	12%	28%	28%	22%	50%	-	22%
London's digital infrastructure not being strong enough	10%	17%	22%	4%	11%	12%	6%	-	-	11%
Other (Please see tab Q1 Other)	9%	-	-	8%	11%	11%	11%	-	-	8%
Don't know	6%	-	-	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	10%	-	11%	16%	6%	11%	17%	-	-	9%

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

BPB_q2. 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)

	155	123	32	2	22	38	43	50	134	21
Base: Middle managers and above from Tech SMEs in London										
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%

BPB_q3. 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)

	108	91	17	2	19	32	27	28	90	18
Base: Middle managers and above from Tech SMEs in London whose businesses have experienced obstacles to expanding in London										
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%

Total	Company annual turnover					
Base	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

BPB_q2. 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	3	83	26	17	10	16
Lack of access to second stage funding or investment	12%	67%	7%	15%	24%	20%	6%
Lack of high quality office space at the right price	21%	-	19%	19%	24%	50%	13%
High staff turnover	12%	-	7%	27%	29%	10%	-
Lack of available, suitably qualified/ experienced staff	19%	-	13%	35%	35%	20%	13%
The cost of running the business (i.e. staff and operational expenses)	26%	-	23%	35%	35%	40%	19%
Lack of a supportive local business community	14%	-	11%	8%	35%	30%	6%
Limited access to clients	23%	67%	25%	19%	24%	20%	6%
London's digital infrastructure not being strong enough	10%	-	12%	-	18%	-	13%
Other (Please see tab Q2 Other)	3%	-	6%	-	-	-	-
Don't know	5%	-	5%	4%	6%	-	6%
Not applicable – there have never been any obstacles to my business expanding in London	26%	-	31%	12%	12%	10%	50%

BPB_q3. 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	3	53	22	14	9	7
Slower than anticipated growth of the business	41%	100%	45%	41%	29%	22%	29%
Lower than expected turnover	33%	67%	40%	23%	36%	33%	-
Unable to hire more staff	23%	-	19%	27%	36%	22%	29%
Delayed product launch	14%	-	8%	23%	29%	11%	14%
Unable to meet orders or deadlines	10%	-	9%	9%	21%	11%	-
Lost out on new/ potential business	37%	-	47%	32%	14%	44%	29%
Staff left the business	9%	-	6%	18%	21%	-	-
None of these	7%	-	6%	5%	7%	11%	29%
Don't know	3%	-	4%	-	-	11%	-

Total	Industry							
Base	Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing	Internet/ Web Development	Telecommunications	Other Technology Services industry

BPB_q2. 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	24	22	37	9	37	13	6	7
Lack of access to second stage funding or investment	12%	21%	-	8%	33%	16%	8%	-	14%
Lack of high quality office space at the right price	21%	25%	14%	16%	-	30%	23%	17%	29%
High staff turnover	12%	17%	9%	3%	-	27%	15%	-	-
Lack of available, suitably qualified/ experienced staff	19%	21%	23%	24%	11%	16%	15%	17%	14%
The cost of running the business (i.e. staff and operational expenses)	26%	33%	14%	27%	11%	46%	-	17%	14%
Lack of a supportive local business community	14%	8%	5%	8%	11%	27%	8%	50%	-
Limited access to clients	23%	17%	18%	22%	33%	27%	23%	17%	29%
London's digital infrastructure not being strong enough	10%	25%	9%	-	-	16%	-	-	14%
Other (Please see tab Q2 Other)	3%	4%	5%	3%	-	-	-	17%	14%
Don't know	5%	4%	5%	5%	-	3%	8%	-	14%
Not applicable – there have never been any obstacles to my business expanding in London	26%	25%	45%	30%	44%	11%	31%	17%	-

BPB_q3. 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	17	11	24	5	32	8	5	6
Slower than anticipated growth of the business	41%	47%	45%	58%	20%	31%	25%	40%	33%
Lower than expected turnover	33%	41%	36%	33%	-	28%	38%	20%	67%
Unable to hire more staff	23%	29%	27%	17%	20%	28%	13%	20%	17%
Delayed product launch	14%	24%	9%	8%	-	13%	38%	20%	-
Unable to meet orders or deadlines	10%	6%	18%	13%	-	9%	13%	-	17%
Lost out on new/ potential business	37%	53%	18%	38%	40%	38%	13%	40%	50%
Staff left the business	9%	12%	9%	8%	-	9%	13%	-	17%
None of these	7%	-	9%	8%	40%	6%	13%	-	-
Don't know	3%	-	-	4%	-	6%	-	-	-

Total	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

BPB_q2. 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	6	9	25	36	57	18	2	2	76
Lack of access to second stage funding or investment	12%	33%	-	12%	11%	12%	11%	50%	-	12%
Lack of high quality office space at the right price	21%	17%	33%	16%	3%	30%	28%	50%	-	12%
High staff turnover	12%	-	11%	8%	14%	14%	17%	-	-	11%
Lack of available, suitably qualified/ experienced staff	19%	-	11%	20%	25%	19%	22%	-	-	20%
The cost of running the business (i.e. staff and operational expenses)	26%	33%	22%	12%	31%	35%	11%	50%	-	24%
Lack of a supportive local business community	14%	17%	11%	4%	14%	14%	22%	50%	-	11%
Limited access to clients	23%	33%	22%	12%	25%	28%	11%	50%	-	21%
London's digital infrastructure not being strong enough	10%	17%	33%	-	6%	16%	-	-	-	8%
Other (Please see tab Q2 Other)	3%	-	-	8%	3%	2%	6%	-	-	4%
Don't know	5%	-	-	8%	8%	4%	-	-	-	7%
Not applicable – there have never been any obstacles to my business expanding in London	26%	-	22%	40%	17%	28%	17%	50%	100%	24%

BPB_q3. 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	6	7	13	27	39	15	1	-	53
Slower than anticipated growth of the business	41%	67%	14%	46%	33%	49%	33%	-	-	38%
Lower than expected turnover	33%	33%	14%	31%	19%	51%	27%	-	-	23%
Unable to hire more staff	23%	33%	29%	31%	19%	21%	27%	-	-	25%
Delayed product launch	14%	-	14%	23%	15%	18%	-	-	-	15%
Unable to meet orders or deadlines	10%	-	29%	31%	4%	10%	-	-	-	13%
Lost out on new/ potential business	37%	17%	29%	46%	26%	49%	27%	100%	-	30%
Staff left the business	9%	-	-	-	11%	10%	20%	-	-	6%
None of these	7%	-	-	-	11%	5%	20%	-	-	6%
Don't know	3%	-	-	-	-	8%	-	-	-	-

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

bpb_q3r. 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%

BPB_q4. 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%	-

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

bpb_q3r. 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	3	83	26	17	10	16
Slower than anticipated growth of the business	28%	100%	29%	35%	24%	20%	13%
Lower than expected turnover	23%	67%	25%	19%	29%	30%	-
Unable to hire more staff	16%	-	12%	23%	29%	20%	13%
Delayed product launch	10%	-	5%	19%	24%	10%	6%
Unable to meet orders or deadlines	7%	-	6%	8%	18%	10%	-
Lost out on new/ potential business	26%	-	30%	27%	12%	40%	13%
Staff left the business	6%	-	4%	15%	18%	-	-
None of these	5%	-	4%	4%	6%	10%	13%
Don't know	6%	-	7%	4%	6%	10%	6%
Not applicable – there have never been any obstacles to my business expanding in London	26%	-	31%	12%	12%	10%	50%

BPB_q4. 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	3	83	26	17	10	16
Much more difficult	6%	-	7%	-	12%	-	13%
Slightly more difficult	19%	-	18%	15%	29%	40%	13%
No difference	37%	100%	34%	42%	24%	30%	56%
Slightly less difficult	25%	-	29%	23%	29%	20%	13%
Much less difficult	4%	-	1%	15%	6%	-	-
Don't know	8%	-	11%	4%	-	10%	6%

Total	Industry							
Base	Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing	Internet/ Web Development	Telecommunications	Other Technology Services industry

bpb_q3r. 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	24	22	37	9	37	13	6	7
Slower than anticipated growth of the business	28%	33%	23%	38%	11%	27%	15%	33%	29%
Lower than expected turnover	23%	29%	18%	22%	-	24%	23%	17%	57%
Unable to hire more staff	16%	21%	14%	11%	11%	24%	8%	17%	14%
Delayed product launch	10%	17%	5%	5%	-	11%	23%	17%	-
Unable to meet orders or deadlines	7%	4%	9%	8%	-	8%	8%	-	14%
Lost out on new/ potential business	26%	38%	9%	24%	22%	32%	8%	33%	43%
Staff left the business	6%	8%	5%	5%	-	8%	8%	-	14%
None of these	5%	-	5%	5%	22%	5%	8%	-	-
Don't know	6%	4%	5%	8%	-	8%	8%	-	14%
Not applicable – there have never been any obstacles to my business expanding in London	26%	25%	45%	30%	44%	11%	31%	17%	-

BPB_q4. 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	24	22	37	9	37	13	6	7
Much more difficult	6%	4%	-	-	22%	11%	23%	-	-
Slightly more difficult	19%	29%	9%	19%	-	14%	23%	50%	43%
No difference	37%	29%	36%	51%	33%	35%	38%	17%	29%
Slightly less difficult	25%	29%	32%	22%	33%	30%	8%	33%	-
Much less difficult	4%	-	5%	3%	-	8%	8%	-	-
Don't know	8%	8%	18%	5%	11%	3%	-	-	29%

Total	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

bpb_q3r. 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	6	9	25	36	57	18	2	2	76
Slower than anticipated growth of the business	28%	67%	11%	24%	25%	33%	28%	-	-	26%
Lower than expected turnover	23%	33%	11%	16%	14%	35%	22%	-	-	16%
Unable to hire more staff	16%	33%	22%	16%	14%	14%	22%	-	-	17%
Delayed product launch	10%	-	11%	12%	11%	12%	-	-	-	11%
Unable to meet orders or deadlines	7%	-	22%	16%	3%	7%	-	-	-	9%
Lost out on new/ potential business	26%	17%	22%	24%	19%	33%	22%	50%	-	21%
Staff left the business	6%	-	-	-	8%	7%	17%	-	-	4%
None of these	5%	-	-	-	8%	4%	17%	-	-	4%
Don't know	6%	-	-	8%	8%	9%	-	-	-	7%
Not applicable – there have never been any obstacles to my business expanding in London	26%	-	22%	40%	17%	28%	17%	50%	100%	24%

BPB_q4. 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	6	9	25	36	57	18	2	2	76
Much more difficult	6%	-	-	4%	8%	9%	6%	-	-	5%
Slightly more difficult	19%	-	33%	28%	11%	25%	11%	-	-	18%
No difference	37%	83%	33%	36%	25%	35%	61%	50%	-	34%
Slightly less difficult	25%	17%	22%	28%	36%	19%	17%	50%	50%	30%
Much less difficult	4%	-	-	-	8%	4%	6%	-	-	4%
Don't know	8%	-	11%	4%	11%	9%	-	-	50%	8%

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

BPB_q6. 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)

	155	123	32	2	22	38	43	50	134	21
Base: Middle managers and above from Tech SMEs in London										
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%

BPB_q7. 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)

	155	123	32	2	22	38	43	50	134	21
Base: Middle managers and above from Tech SMEs in London										
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%

Total	Company annual turnover					
Base	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

BPB_q6. 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	3	83	26	17	10	16
Very likely	4%	-	-	15%	12%	-	-
Fairly likely	14%	33%	13%	12%	18%	20%	13%
Fairly unlikely	29%	33%	30%	31%	29%	20%	25%
Very unlikely	40%	33%	47%	35%	35%	30%	25%
Don't know	10%	-	10%	8%	-	20%	25%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	3%	-	-	-	6%	10%	13%

BPB_q7. 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	3	83	26	17	10	16
Grow rapidly	3%	-	2%	4%	6%	-	-
Grow steadily	41%	100%	37%	42%	59%	30%	31%
No difference	35%	-	31%	46%	18%	70%	44%
Decline steadily	9%	-	11%	-	12%	-	19%
Decline rapidly	-	-	-	-	-	-	-
Don't know	12%	-	18%	8%	6%	-	6%

Total	Industry							
Base	Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing	Internet/ Web Development	Telecommunications	Other Technology Services industry

BPB_q6. 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	24	22	37	9	37	13	6	7
Very likely	4%	-	-	5%	11%	5%	8%	-	-
Fairly likely	14%	21%	14%	14%	-	14%	15%	17%	14%
Fairly unlikely	29%	38%	32%	16%	11%	35%	23%	33%	57%
Very unlikely	40%	42%	45%	43%	33%	41%	38%	33%	14%
Don't know	10%	-	9%	19%	44%	3%	8%	-	14%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	3%	-	-	3%	-	3%	8%	17%	-

BPB_q7. 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	24	22	37	9	37	13	6	7
Grow rapidly	3%	-	-	-	-	8%	8%	-	-
Grow steadily	41%	38%	41%	38%	44%	51%	38%	17%	29%
No difference	35%	42%	41%	38%	22%	30%	38%	50%	14%
Decline steadily	9%	13%	-	8%	22%	8%	8%	17%	14%
Decline rapidly	-	-	-	-	-	-	-	-	-
Don't know	12%	8%	18%	16%	11%	3%	8%	17%	43%

Total	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

BPB_q6. 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)

	155	6	9	25	36	57	18	2	2	76
Base: Middle managers and above from Tech SMEs in London										
Very likely	4%	-	-	4%	14%	-	-	-	-	8%
Fairly likely	14%	33%	11%	24%	11%	12%	11%	-	-	17%
Fairly unlikely	29%	33%	33%	20%	25%	39%	22%	-	-	25%
Very unlikely	40%	33%	11%	36%	39%	42%	44%	100%	100%	34%
Don't know	10%	-	33%	12%	8%	5%	22%	-	-	12%
Not applicable - my business is already considering expanding or relocating to another UK region outside of London	3%	-	11%	4%	3%	2%	-	-	-	4%

BPB_q7. 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)

	155	6	9	25	36	57	18	2	2	76
Base: Middle managers and above from Tech SMEs in London										
Grow rapidly	3%	-	-	-	8%	2%	-	-	-	4%
Grow steadily	41%	83%	44%	44%	36%	40%	39%	-	-	43%
No difference	35%	17%	22%	40%	33%	37%	33%	100%	50%	33%
Decline steadily	9%	-	22%	8%	3%	12%	11%	-	-	7%
Decline rapidly	-	-	-	-	-	-	-	-	-	-
Don't know	12%	-	11%	8%	19%	9%	17%	-	50%	13%

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

BPB_q7a. 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%

BPB_q8. 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%

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

BPB_q7a. 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	3	83	26	17	10	16
Rising costs in London (e.g. staffing, property etc.)	56%	100%	57%	46%	71%	60%	44%
The higher quality of life in regional hubs (e.g. affordable housing, pace of life etc.)	37%	33%	33%	46%	53%	40%	25%
The greater space and flexibility to expand in regional hubs	29%	-	33%	23%	18%	40%	31%
The established digital infrastructure in regional hubs	17%	-	16%	15%	29%	30%	13%
The exciting, growing communities of tech companies in the regions	17%	33%	10%	4%	47%	50%	19%
The ease of recruiting staff in the regions	26%	-	25%	31%	24%	30%	25%
The ease of retaining staff in the regions	23%	-	22%	31%	29%	10%	25%
The specific technology specialisms and expertise in the regions	15%	-	12%	19%	29%	-	25%
The culture of innovation, R&D (research and development) and academic success in the regions	21%	-	18%	23%	41%	30%	13%
Government policy and regulations supporting growth in this sector	20%	67%	18%	19%	24%	20%	19%
The work of regional business support networks and organisations	19%	-	14%	27%	24%	40%	13%
None of these	4%	-	5%	4%	-	-	6%
Don't know	10%	-	12%	4%	-	10%	19%

BPB_q8. 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	3	83	26	17	10	16
Community of similar technology companies	18%	-	13%	23%	35%	10%	25%
Availability of quality office space at the right price	32%	-	33%	27%	35%	30%	38%
Fast broadband and great digital infrastructure	48%	33%	52%	35%	47%	60%	50%
Community of funders and investors / access to finance	15%	67%	16%	8%	12%	20%	13%
Up and coming staff talent	23%	-	24%	19%	35%	30%	13%
A busy metropolitan lifestyle	14%	67%	12%	8%	18%	30%	6%
Somewhere staff can settle long-term	23%	33%	24%	23%	29%	10%	13%
A reputation for innovation and creativity	14%	67%	13%	15%	24%	-	6%
An experienced local workforce	26%	33%	28%	27%	29%	10%	25%
Loyal staff who will stay with the business	21%	-	18%	23%	29%	40%	13%
Other	6%	-	8%	8%	-	-	6%
Don't know	10%	-	11%	4%	-	-	31%

Total	Industry							
Base	Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing	Internet/ Web Development	Telecommunications	Other Technology Services industry

BPB_q7a. 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	24	22	37	9	37	13	6	7
Rising costs in London (e.g. staffing, property etc.)	56%	50%	68%	62%	44%	49%	62%	50%	57%
The higher quality of life in regional hubs (e.g. affordable housing, pace of life etc.)	37%	46%	45%	32%	33%	32%	46%	33%	14%
The greater space and flexibility to expand in regional hubs	29%	38%	45%	30%	33%	24%	23%	-	-
The established digital infrastructure in regional hubs	17%	33%	18%	16%	11%	16%	-	33%	-
The exciting, growing communities of tech companies in the regions	17%	25%	27%	14%	22%	8%	31%	-	-
The ease of recruiting staff in the regions	26%	29%	36%	27%	-	22%	31%	17%	29%
The ease of retaining staff in the regions	23%	25%	32%	24%	11%	16%	31%	17%	29%
The specific technology specialisms and expertise in the regions	15%	13%	9%	22%	22%	19%	-	17%	14%
The culture of innovation, R&D (research and development) and academic success in the regions	21%	29%	18%	32%	-	14%	31%	-	14%
Government policy and regulations supporting growth in this sector	20%	17%	27%	24%	22%	19%	15%	17%	-
The work of regional business support networks and organisations	19%	17%	14%	27%	11%	22%	23%	-	-
None of these	4%	4%	-	5%	11%	5%	-	-	-
Don't know	10%	8%	9%	5%	22%	11%	15%	-	14%

BPB_q8. 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	24	22	37	9	37	13	6	7
Community of similar technology companies	18%	25%	18%	16%	22%	16%	15%	17%	14%
Availability of quality office space at the right price	32%	38%	32%	35%	33%	24%	31%	-	57%
Fast broadband and great digital infrastructure	48%	67%	36%	54%	33%	41%	46%	67%	43%
Community of funders and investors / access to finance	15%	8%	27%	16%	22%	8%	8%	17%	29%
Up and coming staff talent	23%	29%	27%	16%	-	22%	54%	17%	14%
A busy metropolitan lifestyle	14%	8%	14%	14%	33%	5%	23%	33%	14%
Somewhere staff can settle long-term	23%	38%	23%	16%	22%	22%	15%	33%	14%
A reputation for innovation and creativity	14%	8%	23%	22%	-	14%	8%	-	14%
An experienced local workforce	26%	17%	32%	27%	22%	32%	31%	-	29%
Loyal staff who will stay with the business	21%	21%	27%	16%	11%	19%	23%	17%	43%
Other	6%	8%	5%	8%	-	8%	-	17%	-
Don't know	10%	4%	9%	8%	33%	11%	8%	17%	-

Total	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

BPB_q7a. 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	6	9	25	36	57	18	2	2	76
Rising costs in London (e.g. staffing, property etc.)	56%	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.)	37%	17%	22%	44%	31%	39%	50%	50%	-	33%
The greater space and flexibility to expand in regional hubs	29%	17%	-	40%	25%	28%	44%	50%	-	26%
The established digital infrastructure in regional hubs	17%	33%	22%	12%	8%	25%	11%	50%	-	13%
The exciting, growing communities of tech companies in the regions	17%	33%	22%	20%	19%	14%	11%	-	-	21%
The ease of recruiting staff in the regions	26%	-	11%	36%	28%	26%	22%	-	50%	26%
The ease of retaining staff in the regions	23%	-	22%	32%	19%	21%	39%	-	-	22%
The specific technology specialisms and expertise in the regions	15%	-	22%	12%	14%	21%	11%	-	-	13%
The culture of innovation, R&D (research and development) and academic success in the regions	21%	-	11%	28%	25%	23%	11%	50%	-	22%
Government policy and regulations supporting growth in this sector	20%	33%	11%	8%	17%	19%	44%	50%	-	14%
The work of regional business support networks and organisations	19%	33%	-	16%	22%	21%	17%	-	-	18%
None of these	4%	-	-	8%	-	5%	6%	-	-	3%
Don't know	10%	-	11%	12%	11%	7%	6%	50%	50%	11%

BPB_q8. 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	6	9	25	36	57	18	2	2	76
Community of similar technology companies	18%	17%	33%	8%	19%	25%	6%	-	-	17%
Availability of quality office space at the right price	32%	17%	22%	32%	22%	39%	39%	50%	-	25%
Fast broadband and great digital infrastructure	48%	33%	44%	56%	36%	60%	33%	50%	50%	43%
Community of funders and investors / access to finance	15%	33%	11%	24%	11%	12%	6%	50%	50%	17%
Up and coming staff talent	23%	17%	11%	20%	28%	19%	39%	-	50%	22%
A busy metropolitan lifestyle	14%	33%	11%	16%	19%	11%	6%	-	-	18%
Somewhere staff can settle long-term	23%	33%	11%	24%	17%	23%	33%	50%	-	20%
A reputation for innovation and creativity	14%	50%	11%	8%	19%	11%	11%	-	50%	17%
An experienced local workforce	26%	33%	44%	16%	25%	25%	33%	50%	50%	25%
Loyal staff who will stay with the business	21%	-	-	12%	14%	25%	44%	50%	50%	11%
Other	6%	-	-	12%	8%	5%	6%	-	-	8%
Don't know	10%	-	22%	12%	8%	11%	6%	-	-	11%

Total	Gender		Age					Organisation size	
	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)

BPB_q9_1. 'The UK would benefit from having bigger, stronger technology hubs outside of London' :

	155	123	32	2	22	38	43	50	134	21
Base: Middle managers and above from Tech SMEs in London										
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%

BPB_q9_2. Government policy for the digital economy is too focused on "Tech City" (i.e. East London) :

	155	123	32	2	22	38	43	50	134	21
Base: Middle managers and above from Tech SMEs in London										
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%

Total	Company annual turnover					
Base	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)

BPB_q9_1. 'The UK would benefit from having bigger, stronger technology hubs outside of London' :

Base: Middle managers and above from Tech SMEs in London	155	3	83	26	17	10	16
Strongly agree	19%	-	17%	23%	24%	-	31%
Tend to agree	43%	67%	43%	35%	53%	50%	31%
Neither agree nor disagree	25%	-	24%	27%	18%	50%	19%
Tend to disagree	9%	33%	10%	12%	6%	-	6%
Strongly disagree	1%	-	-	4%	-	-	6%
Don't know	4%	-	6%	-	-	-	6%

BPB_q9_2. 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	3	83	26	17	10	16
Strongly agree	9%	-	7%	12%	18%	-	13%
Tend to agree	35%	67%	34%	35%	41%	50%	25%
Neither agree nor disagree	30%	33%	28%	35%	18%	30%	44%
Tend to disagree	14%	-	16%	19%	12%	10%	6%
Strongly disagree	3%	-	4%	-	6%	-	-
Don't know	9%	-	12%	-	6%	10%	13%

Total	Industry							
Base	Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing	Internet/ Web Development	Telecommunications	Other Technology Services industry

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

BPB_q9_1. 'The UK would benefit from having bigger, stronger technology hubs outside of London' :

Base: Middle managers and above from Tech SMEs in London	155	24	22	37	9	37	13	6	7
Strongly agree	19%	13%	18%	27%	22%	14%	15%	17%	29%
Tend to agree	43%	42%	45%	49%	33%	30%	69%	33%	43%
Neither agree nor disagree	25%	25%	23%	19%	22%	38%	8%	33%	14%
Tend to disagree	9%	8%	9%	5%	22%	11%	-	17%	14%
Strongly disagree	1%	-	-	-	-	5%	-	-	-
Don't know	4%	13%	5%	-	-	3%	8%	-	-

BPB_q9_2. 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	24	22	37	9	37	13	6	7
Strongly agree	9%	4%	5%	8%	11%	8%	23%	33%	-
Tend to agree	35%	42%	27%	32%	33%	43%	15%	33%	57%
Neither agree nor disagree	30%	17%	36%	32%	33%	30%	38%	17%	29%
Tend to disagree	14%	21%	14%	19%	11%	11%	15%	-	-
Strongly disagree	3%	-	9%	3%	-	-	-	17%	-
Don't know	9%	17%	9%	5%	11%	8%	8%	-	14%

Total	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)

BPB_q9_1. 'The UK would benefit from having bigger, stronger technology hubs outside of London' :

	155	6	9	25	36	57	18	2	2	76
Base: Middle managers and above from Tech SMEs in London										
Strongly agree	19%	-	22%	20%	14%	19%	33%	-	-	16%
Tend to agree	43%	67%	22%	40%	44%	39%	61%	-	50%	42%
Neither agree nor disagree	25%	-	44%	28%	25%	28%	-	100%	-	26%
Tend to disagree	9%	33%	11%	8%	8%	9%	6%	-	-	11%
Strongly disagree	1%	-	-	-	3%	2%	-	-	-	1%
Don't know	4%	-	-	4%	6%	4%	-	-	50%	4%

BPB_q9_2. Government policy for the digital economy is too focused on "Tech City" (i.e. East London) :

	155	6	9	25	36	57	18	2	2	76
Base: Middle managers and above from Tech SMEs in London										
Strongly agree	9%	-	11%	4%	11%	9%	17%	-	-	8%
Tend to agree	35%	33%	22%	48%	33%	33%	28%	100%	50%	37%
Neither agree nor disagree	30%	50%	44%	24%	25%	30%	39%	-	-	29%
Tend to disagree	14%	-	11%	16%	17%	18%	6%	-	-	14%
Strongly disagree	3%	17%	-	-	3%	2%	6%	-	-	3%
Don't know	9%	-	11%	8%	11%	9%	6%	-	50%	9%

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

BPB_q9_3. '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%

BPB_q9_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

	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%

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

BPB_q9_3. '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	3	83	26	17	10	16
Strongly agree	3%	-	4%	-	6%	-	-
Tend to agree	31%	-	30%	38%	47%	30%	13%
Neither agree nor disagree	30%	67%	28%	23%	24%	50%	38%
Tend to disagree	25%	33%	28%	31%	12%	10%	25%
Strongly disagree	6%	-	5%	8%	6%	10%	13%
Don't know	5%	-	6%	-	6%	-	13%

BPB_q9_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

	155	3	83	26	17	10	16
Strongly agree	5%	33%	2%	4%	18%	-	-
Tend to agree	15%	-	12%	23%	24%	20%	6%
Neither agree nor disagree	26%	33%	25%	31%	18%	40%	25%
Tend to disagree	33%	-	37%	31%	24%	30%	31%
Strongly disagree	15%	33%	14%	12%	18%	10%	19%
Don't know	6%	-	8%	-	-	-	19%

Total	Industry							
Base	Information and Communication Technology	Professional Scientific and Technical	Computer Software/ Internet	Computer/ Electronic Equipment	Computing/ IT/ Data Processing	Internet/ Web Development	Telecommunications	Other Technology Services industry

BPB_q9_3. '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	24	22	37	9	37	13	6	7
Strongly agree	3%	-	-	5%	-	3%	8%	-	-
Tend to agree	31%	33%	41%	35%	33%	24%	31%	17%	14%
Neither agree nor disagree	30%	29%	23%	30%	44%	24%	38%	33%	43%
Tend to disagree	25%	21%	32%	24%	22%	35%	-	33%	14%
Strongly disagree	6%	4%	5%	3%	-	11%	15%	17%	-
Don't know	5%	13%	-	3%	-	3%	8%	-	29%

BPB_q9_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

	155	24	22	37	9	37	13	6	7
Strongly agree	5%	-	-	3%	11%	5%	8%	17%	14%
Tend to agree	15%	13%	18%	16%	22%	14%	15%	17%	-
Neither agree nor disagree	26%	17%	36%	43%	22%	16%	23%	17%	14%
Tend to disagree	33%	42%	41%	19%	33%	43%	23%	17%	29%
Strongly disagree	15%	21%	5%	8%	11%	19%	23%	33%	14%
Don't know	6%	8%	-	11%	-	3%	8%	-	29%

Total	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

BPB_q9_3. '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	6	9	25	36	57	18	2	2	76
Strongly agree	3%	17%	-	-	3%	4%	-	-	-	3%
Tend to agree	31%	17%	11%	36%	44%	25%	33%	50%	-	36%
Neither agree nor disagree	30%	33%	33%	28%	25%	26%	50%	50%	-	28%
Tend to disagree	25%	33%	44%	24%	22%	26%	11%	-	100%	26%
Strongly disagree	6%	-	11%	4%	3%	11%	6%	-	-	4%
Don't know	5%	-	-	8%	3%	9%	-	-	-	4%

BPB_q9_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

	155	6	9	25	36	57	18	2	2	76
Strongly agree	5%	33%	-	-	11%	2%	-	-	-	8%
Tend to agree	15%	-	-	12%	25%	11%	11%	100%	50%	16%
Neither agree nor disagree	26%	17%	33%	24%	19%	26%	50%	-	-	22%
Tend to disagree	33%	33%	56%	36%	33%	35%	11%	-	50%	37%
Strongly disagree	15%	17%	11%	20%	8%	19%	11%	-	-	13%
Don't know	6%	-	-	8%	3%	7%	17%	-	-	4%