

## *Size and Health of the UK Space Industry 2023 - Questionnaire*

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### **Welcome to the annual survey of the UK Space Sector**

Commissioned by the UK Space Agency (UKSA), the Size and Health of the UK Space Industry study is the most important resource to assess the health of the industry and track the effectiveness of UKSA strategies and activities. To achieve this, all organisations in the UK who supply and/or make use of space or satellite services are surveyed once a year to provide input. The study offers insight into the industry growth and developments, including trends of sub-sectors and emerging constraints to the sector.

Dr Paul Bate, Chief Executive of the UK Space Agency, has written to you to explain the importance of your input. You can access his letter by clicking [this link](#).

There are 17 core questions covering UK operations in the **2021/22 financial year** (with an estimate also requested for the **2022/23 financial year**). These questions should take around 30 minutes to complete. A further 9 supplementary questions consider broader aspects of your organisation.

As a reward for making it all the way through the survey, we offer you the opportunity to upload your organisation's logo, to be used in UK Space Agency communications about the space industry.

Before starting, we strongly recommend gathering all relevant information in advance (much of which can be found in your financial accounts - [see list](#)). Where actual data is not available (e.g. detailed breakdowns), please provide approximations and indicate the evidence-base (actual data, input data used to create a projection or estimate, or an estimate based on limited information or personal experience).

All responses will be kept confidential, and only aggregate results will be published – for more information, please consult our [data protection](#) and [privacy policy](#).

The survey will remain open until 1st December, but please respond as soon as possible. We welcome participation online, by email, or by phone (please email for an appointment).

For help, please [contact us](#).

Thank you.

## About you and your organisation

### Please tell us about yourself

This information will only be used for the purposes of assisting you with this survey.

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Email: \_\_\_\_\_

### Please tell us about your organisation

Organisation name: \_\_\_\_\_

Company registration number (CRN): \_\_\_\_\_

Address (UK Head Office): \_\_\_\_\_

Postcode (UK Head Office): \_\_\_\_\_

### How would you classify your organisation?

Please respond based on your total UK operations.

Please select one response.

- Micro enterprise ( $\leq 10$  employees) \_\_\_\_\_
- Small or Medium-sized Enterprise, SME ( $10 < \text{employees} < 250$ ) \_\_\_\_\_
- Large enterprise ( $\geq 250$  employees) \_\_\_\_\_
- Research / Non-commercial \_\_\_\_\_
- Other (please specify): \_\_\_\_\_

### Is your organisation a university / Higher Education institute spin-out or is it licensing Intellectual Property (IP) from a university / Higher Education institute?

Note: A spin-out is a company that is set-up to exploit IP that has originated from within the Higher Education provider.

Please select all that apply.

- Yes, my organisation is a spin-out. Please specify the Higher Education provider:  
\_\_\_\_\_
- Yes, my organisation is licensing IP. Please specify the Higher Education provider:  
\_\_\_\_\_
- No, my organisation is not a spin-out and is not licensing IP from a university / Higher Education institution.

**Is your organisation currently part of a / an alumnus of a business accelerator or incubator?**

Please select all that apply.

- Yes, my organisation is currently part of a business accelerator / business incubator. Please specify the programme:

\_\_\_\_\_

- Yes, my organisation is an alumnus of a business accelerator / business incubator. Please specify the programme:

\_\_\_\_\_

No, my organisation has never been involved with a business accelerator / business incubator.

\_\_\_\_\_

**Please tell us about your financial year**

Please indicate the end-date of the period you will be reporting for the '2021/22' financial year:

Day: \_\_\_\_\_

Month: \_\_\_\_\_

**Space-related activities**

Please indicate whether your organisation is engaged in any of the following 'space-related activities'.

Please select all that apply.

**a) Design and/or manufacture of space equipment and subsystems?**

Including: launch vehicles and subsystems, satellites/payloads/spacecraft and subsystems, scientific instruments, ground segment systems and equipment (control centres and telemetry), suppliers of materials and components, scientific and engineering support, fundamental and applied research

- Yes
- No

**b) Launch and/or operation of satellites?**

Including: launch services, launch brokerage services, proprietary satellite operation (incl. sale/lease of capacity), third-party ground segment operation, ground station networks

- Yes
- No

**c) In-space economy?**

Including: in-orbit servicing (incl. space-tug), in-space manufacturing, Space Surveillance & Tracking (SST), debris removal, space tourism, space resource utilisation, other in-space/lunar activities

- Yes
- No

**d) Applications of satellite signals and data?**

Including: Direct-To-Home (DTH) broadcasting, fixed and mobile satellite communications services (incl. VSAT), location-based signal and connectivity service providers, supply of user devices and equipment, processors of satellite data, applications relying on embedded satellite signals (e.g. GPS devices and location-based services) and/or data (e.g. meteorology, commercial GIS software and geospatial products), other (e.g. Quantum Key Distribution)

- Yes
- No

**e) Specialised support services?**

Including: launch and satellite insurance (incl. brokerage) services, financial and legal services, software and IT services, market research and consultancy services, business incubation and development, policymaking, regulation and oversight

- Yes
- No

**f) Are you involved in any other space-related activities not covered in these categories?**

- Yes
- No

If 'Yes', please elaborate:

## Key financials

### Income

#### 1. What was the total space-related income\* of your organisation's UK operations in these financial years\*\* in £GBP?

Please provide an approximation if actual data is unavailable.

Please indicate the level of gross income and the unit of measurement (i.e. £, £k, £m or £bn)

\* 'Total space-related income' = Income from all activities that you selected in the 'Space-related activities'.

\*\* If 2022/23 data is unavailable, please provide an estimate/forecast instead.

	<u>Income</u> (gross)	<u>Unit</u> (£, £k, £m or £bn)
2021/22:	£ _____	_____
2022/23e**:	£ _____	_____

**Please outline any notable developments explaining any significant increases/decreases in income since 2020/21:**

**Please indicate your degree of confidence in the 2022/23e figure provided.**

Please select one response.

- Actual data
- Confident estimate (e.g. through data based on two or more quarters)
- Uncertain estimate (e.g. through data based on less than two quarters)

**2. Considering UK space-related income in the most recently completed financial year, please estimate the breakdown by capability.**

Please provide an approximate percentage if actual data is unavailable.

Defence/Military	_____%
Earth Observation (excl. Meteorology)	_____%
Meteorology	_____%
Positioning, Navigation, Timing (incl. GNSS)	_____%
Satellite Communications (excl. broadcasting)	_____%
Broadcasting	_____%
Science	_____%
Space Exploration (incl. ISS, rovers, probes, excl. in-space economy)	_____%
In-space Economy*	_____%
Space Transportation (incl. launch, space-tugs)	_____%
Space technologies (used in multiple systems, e.g. solar)	_____%
Generic technologies/components that enable space capabilities (e.g. AI)	_____%
Total: 100%	Sum=100%

\* Including Space Surveillance & Tracking, In-orbit servicing, assembly & manufacturing, Active debris removal, Space Resource Utilisation, Space tourism, Lunar operations, and Deep-space transport

**Please indicate your evidence-base for the figures provided.**

Please select one response.

- Actual data
- Input data
- Estimate

**Please indicate if there are any uncertainties or inconsistencies around the data that you would like to flag:**

## Employment

**3. How many UK-based space-related\* employees did your organisation employ in these financial years\*\*?**

Please provide an approximation if actual data is unavailable.

\* 'Space-related employees' = employees involved in all activities which you selected in Q.1 'Space-related activities'.

\*\* If 2022/23 data is unavailable, please provide an estimate/forecast instead.

2021/22: \_\_\_\_\_

2022/23e\*\*: \_\_\_\_\_

Please outline any notable developments explaining any significant increases/decreases in employment since 2020/21:

**4. Please provide location details of all your UK sites which are involved in space-related activities and the percentage of UK-based space-related employees employed in each site in the most recently completed financial year.**

Please provide an approximation if actual data is unavailable.

<u>Name of location</u>	<u>Postcode</u>	<u>Town / City</u>	<u>% of all <i>space-related</i> employees</u>
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%

**Overflow – Any other UK locations and percentage of *space-related* employees:**

## Supplier inputs

### 5. Considering your space-related income, what percentage (%) was spent on purchasing inputs from suppliers in these financial years\*\*?

**Example:** If your organisation purchased £400 worth of inputs from suppliers to generate £1,000 of space-related turnover, total inputs = 40% of space-related turnover. Please provide an approximation if actual data is unavailable.

\*\* If 2022/23 data is unavailable, please provide an estimate/forecast instead.

2021/22: \_\_\_\_\_%

2022/23e\*\* : \_\_\_\_\_%

**Please indicate your evidence-base for the figures provided.**

Please select one response.

- Actual data
- Input data
- Estimate

**Please indicate if there are any uncertainties or inconsistencies around the data that you would like to flag:**

### 6. Please estimate the breakdown of inputs by type and location of supplier in the most recently completed financial year.

**Example:** If the £400 of inputs from the previous example (40% of space-related turnover) breaks down as: £200 from UK-based suppliers within the space industry, £100 from UK-based suppliers in other industries, and £100 from overseas suppliers (any industry), please put: 50%, 25%, 25% in the boxes below, respectively.

Total inputs purchased = 100%.

Please provide an approximation if actual data is unavailable.

UK-based suppliers

Space industry \_\_\_\_\_%

Non-space industries \_\_\_\_\_%

Overseas suppliers (non-UK-based) \_\_\_\_\_%

Total: 100% Sum=100%



**Please indicate your degree of confidence in the figures provided.**

Please select one response.

- Actual data
- Input data
- Estimate

**Please indicate if there are any uncertainties or inconsistencies around the data that you would like to flag:**

## Space-related income breakdown

### 7. Considering space-related income in the most recently completed financial year, please estimate the breakdown by customer location.

Please provide an approximation if actual data is unavailable. Based on the [UN geoscheme](#).

UK (domestic)	_____ %
<u>Europe</u> (incl. ESA, EC, EEA; excl. UK)	
European Space Agency (any location)	_____ %
EU (incl. EC)	_____ %
Non-EU Europe (incl. Norway, Switzerland, Ukraine, Russia)	_____ %
Northern America (incl. USA, Canada)	_____ %
Central & South America (incl. Caribbean)	_____ %
Middle-East & Northern Africa (incl. Israel, Saudi Arabia, Egypt)	_____ %
Rest of Africa	_____ %
Asia & Oceania	_____ %
Total: 100%	Sum=100%

**Please indicate your evidence-base for the figures provided.**

Please select one response.

- Actual data
- Input data
- Estimate

**Please indicate if there are any uncertainties or inconsistencies around the data that you would like to flag:**

### 8. Considering space-related income in the most recently completed financial year, please estimate the breakdown by customer type.

Please provide an approximation if actual data is unavailable. As a % of total space-related income (total = 100%).

<u>UK Space Agency</u>	_____ %
<u>European Space Agency</u>	
Galileo	_____ %
Copernicus	_____ %

EGNOS	_____ %
Other programmes	_____ %
Other Space Agency	_____ %
<u>European Commission</u>	
Horizon Europe	_____ %
Other	_____ %
<u>Other Civil Government</u>	_____ %
<u>Defence/Military</u>	_____ %
<u>Commercial</u>	
To Business (B2B)	_____ %
To Consumer (B2C)	_____ %
<u>Research/Science Funding Bodies</u>	_____ %
Total: 100%	Sum=100%

**9. Considering space-related income in the most recently completed financial year, please estimate the breakdown by activity.**

Please provide an approximation if actual data is unavailable. As a % of total space-related income (total = 100%).

**Design and/or manufacture of space equipment and subsystems**

Launch vehicles and subsystems	_____ %
Satellites/payloads/spacecraft and subsystems	_____ %
Scientific instruments	_____ %
Ground segment systems and equipment	_____ %
Suppliers of materials and components	_____ %
Scientific and engineering support	_____ %
Fundamental and applied research	_____ %

**Launch and/or operations**

Launch services	_____ %
Launch brokerage services	_____ %
Proprietary satellite operation (incl. sale/lease of capacity)	_____ %
Third-party ground segment operation	_____ %
Ground station networks	_____ %

**In-space economy**

In-Orbit Servicing (incl. space tugs)	_____ %
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In-space manufacturing	____%
Space Surveillance & Tracking (SST)	____%
Debris Removal	____%
Space Tourism	____%
Space resource utilisation	____%
Other in-space/lunar activities	____%

**Applications of satellite signals and data**

Direct-To-Home (DTH) broadcasting	____%
Fixed satellite communication services (incl. VSAT)	____%
Mobile satellite communication services	____%
Location-based service providers	____%
Supply of user devices and equipment	____%
Processors of satellite data (e.g. EO)	____%
Applications leveraging satellite signals/data (e.g. nav, geospatial, telematics)	____%
Other (e.g. Quantum Key Distribution)	____%

**Specialised support services**

Launch and satellite insurance (incl. brokerage) services	____%
Legal and financial services	____%
Software and IT services	____%
Market research and consultancy services	____%
Business incubation and development	____%
Policymaking, regulation and oversight	____%

Total: 100%

Sum=100%

**Please describe your organisation's main *space-related* products/services:**

## Research & Development

### 10. Space-related R&D\*

- a) Please estimate your organisation’s total expenditure on research & development (R&D) (including own/internal and external sources of funding) for these financial years.

Please provide an approximation if actual data is unavailable.

Please indicate the level of expenditure and the unit of measurement (i.e. £, £k, £m or £bn).

\* If 2022/23 data is unavailable, please provide an estimate/forecast instead.

	<u>Expenditure</u>	<u>Unit</u> (£, £k, £m or £bn)
2021/22:	£ _____	_____
2022/23e*:	£ _____	_____

- b) What percentage of this total R&D spend is space-related?

Please provide an approximation if actual data is unavailable.

**Example:** If your organisation spent £1,000 on R&D and £800 of this was on space-focused projects = 80%. Please provide an approximation if actual data is unavailable.

\* If 2022/23 data is unavailable, please provide an estimate/forecast instead.

2021/22:	_____ %
2022/23e*:	_____ %

### 11. Please estimate the percentage breakdown of total space-related R&D\* by internal and external funding for the most recently completed financial year.

Please provide an approximation if actual data is unavailable. The total for the financial year should equal 100%.

Internal (also known as intramural) R&D is self-funded out of income or other financing. External (also known as extramural) R&D is funded by another organisation (e.g. a client or public body).

Internal Funding (e.g. matched)	_____ %
External Funding (e.g. grant)	_____ %
Total: 100%	Sum=100%

## Total investment

### 12. How much investment did your organisation receive from the following sources to support current/future space-related activities\* of your UK operations in these financial years?

Please indicate value in £GBP million.

Please provide an approximation if actual data is unavailable.

\* 'Space-related activities' = all activities which you selected in 'Space-related activities'.

\*\* This covers capital deployed from existing reserves to further R&D, capital expenditures (such as equipment), investment in people and tools to develop intellectual property.

	<u>2021/22 (£m)</u>	<u>2022/23 (£m)</u>
Internal funds (Reserves/Owners/Group/HQ)**	£ _____	£ _____
Seed/Prize/Grant	£ _____	£ _____
Venture Capital	£ _____	£ _____
Private Equity	£ _____	£ _____
Debt Financing	£ _____	£ _____
Public Offering	£ _____	£ _____
Acquisition	£ _____	£ _____
Other (please specify below)	£ _____	£ _____

**Other investment source(s):**

### 13. Attracting private investment

a) What, if any, are the main obstacles for your organisation in attracting investment from external private investors?

b) What steps should the UK Space Agency prioritise to boost external private investment into the UK space industry?

## Growth blockers and enablers

### 14. Please rank the importance of these potential obstacles to your company's success in the last year (commercial, research, etc.)?

Please rank from highest (1) to lowest impact (24). If none of these apply to your organisation, please only select 'none of the above'.

- |  |  |
|--|--|
| <input type="checkbox"/> Cost of living (energy, inflation)                  | <input type="checkbox"/> Limitations on EU programme involvement (Galileo, Copernicus, Horizon Europe, etc.) |
| <input type="checkbox"/> COVID-related challenges                            | <input type="checkbox"/> Shortage of managerial skills / expertise   |
| <input type="checkbox"/> Economic uncertainty                                | <input type="checkbox"/> Shortage of skills generally  |
| <input type="checkbox"/> Obtaining finance                                   | <input type="checkbox"/> Pensions  |
| <input type="checkbox"/> Cash flow   | <input type="checkbox"/> Late payment  |
| <input type="checkbox"/> Tax (VAT, PAYE, business rates)                     | <input type="checkbox"/> Not being able to increase prices / fees  |
| <input type="checkbox"/> Recruiting staff                                    | <input type="checkbox"/> Red tape  |
| <input type="checkbox"/> Exchange rates                                      | <input type="checkbox"/> Overseas licensing and regulation   |
| <input type="checkbox"/> Regulations   | <input type="checkbox"/> Export controls   |
| <input type="checkbox"/> Availability / cost of suitable premises            | <input type="checkbox"/> Overseas preference for domestic suppliers  |
| <input type="checkbox"/> Difficulty identifying overseas sales opportunities | <input type="checkbox"/> Other(s) – please specify: _____  |
| <input type="checkbox"/> Competition in the market                           | <input type="checkbox"/> None of the above   |

Could you please provide an estimate of the impact of your picks on e.g. demand, revenue:

**a) Please explain the impact of the factor that you ranked 1 above on your organisation’s performance.**

Please select one response per row.

	Significant negative impact	Some negative impact	No impact	Some positive impact	Significant positive impact	N/A
Demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workforce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments:**

**b) Please explain the impact of the factor that you ranked 2 above on your organisation’s performance.**

Please select one response per row.

	Significant negative impact	Some negative impact	No impact	Some positive impact	Significant positive impact	N/A
Demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workforce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments:**



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**15. Please rank the importance of these key enablers for your company's success in the last year (commercial, research, etc.)?**

Please select all that apply and rank from highest (1) to lowest impact (11). If none of these apply to your organisation, please only select '*none of the above*'.

- National Space Strategy (NSS)
- Support and engagement with the UK Space Agency
- Increased spend across UK national space programmes
- UK funding via ESA programmes
- Encouraging STEM uptake through education and outreach activities
- Securing space launch capability in the UK
- Enhanced export support
- Business-friendly legislation and regulation
- Re-entry of the UK to Copernicus and Horizon funding
- Other(s) – please specify: \_\_\_\_\_
- None of the above

**16. Forward-looking growth influencers****c) Please rank the following contextual factors that by how impactful they are on your organisation's performance.**

Please select all that apply and rank from 1 (highest impact) to 4 (lowest impact). If none of these apply to your organisation, please only select '*none of the above*'.

- Ukraine war
- Cost of living
- COVID-19
- Re-entry of the UK to Copernicus and Horizon funding
- None of the above

**17. Compared to performance in the last 3 years, please estimate how your UK space operations are likely to perform over the next 3 years.**

Please select one response per row.

	Much lower (>10%)	Slightly lower (<10%)	About the same	Slightly higher (<10%)	Much higher (>10%)	
Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
R&D spending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total spending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Please comment on factors influencing your forecasts:**

## Non-core questions

### UKSA Engagement

#### 18. Did your organisation directly engage with the UK Space Agency in the most recently completed financial year?

Direct engagement can include various interactions with the UKSA, e.g. a discussion with someone from the UKSA, attendance at a UKSA event, or participation in a programme.

Please select one response.

- Yes
- No

If 'Yes', continue to next question.

If 'No', skip to Q20.

#### a) How satisfied have you been with the engagement(s) with the UK Space Agency?

Please select one response.

- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

If desired, please elaborate on your response:

#### 19. How have the following UKSA-funded programmes impacted your revenue in the past 12 months?

Please select one response per row.

	Significant negative impact	Some negative impact	No impact	Some positive impact	Significant positive impact	N/A
Centre for Earth Observation Instrumentation (CEOI) / Earth Observation Technology Programme (EOTP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

ESA – Advanced Research in Telecommunications Systems (ARTES)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ESA – General Support Technology Programme (GSTP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ESA – Space Science Programme (SSP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other ESA programmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International Bilateral Fund (IBF)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Space Security Policy (NSSP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bilateral Space Science Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Space Innovation Programme (NSIP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Levelling Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspiration Programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spaceflight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Space Surveillance and Tracking National Space Operations Centre (SST NSPOC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unlocking Space for Business (USB)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Please indicate the programme with the highest positive impact on your revenue:**

**a) For the programme you identified as most impacting to your revenue which of the below options represent how it has helped enhance your revenue?**

Please tick all that apply.

- Increased business coming from the SUPPLY of launch - Increased business with launch service providers, spaceports, or the supply chain which supports UK launch activity.
- UK launch has led to increased foreign and domestic investment opportunities resulting in increased business and/or additional business opportunities.
- Increased business coming from the DEMAND for UK launch- increased business has been realised from foreign and domestic clients for UK launch, which also purchase other space goods/services from UK institutions to support their launch activities.
- Benefits to UK users of UK launch (for example satellite manufacturers, launch brokers etc): the ability to utilise UK launch services as a customer has enhanced our business offering.

**b) For the programme you identified as most impacting to your revenue, approximately what percentage of revenue in the past 12 months was due to this programme?**

Please select one response option.

- Low (1-5%)
- Medium (6-10%)
- High (11-15%)
- Other – please specify % \_\_\_\_\_

**c) Which, if any, of the following do you foresee as obstacles to international competitiveness for the UK Launch offer?**

Please select all that apply.

- |  |  |
|--|--|
| <input type="checkbox"/> Cost of launch  | <input type="checkbox"/> Long lead time to launch              |
| <input type="checkbox"/> Cost of insurance   | <input type="checkbox"/> Inflexible service                    |
| <input type="checkbox"/> Licensing cost  | <input type="checkbox"/> Launch window guarantee not provided  |
| <input type="checkbox"/> Licensing and regulation timescales                                     | <input type="checkbox"/> Logistics                             |
| <input type="checkbox"/> Licensing process unclear   | <input type="checkbox"/> Lack of facilities from UK spaceports |
| <input type="checkbox"/> Admin burden / red tape   | <input type="checkbox"/> UK launch is unproven                 |
| <input type="checkbox"/> Required orbit not accessible using UK launch                           | <input type="checkbox"/> Reliability of UK launch              |
| <input type="checkbox"/> Insufficient payload capacity available on UK launcher (mass/dimension) | <input type="checkbox"/> Not aware of UK launch                |
| <input type="checkbox"/> Complex/lengthy procurement   | <input type="checkbox"/> Need to know more about UK launch     |
|  | <input type="checkbox"/> None of the above                     |
|  | <input type="checkbox"/> Other(s) – please specify: _____      |

## Employment, education, and skills

### 20. What was your total wage bill for space-related\* employees in these financial years\*\* (in £GBP thousands)?

Please provide an approximation if actual data is unavailable.

\* 'Space-related employees' = employees involved in all activities which you selected in 'Space-related activities'.

\*\* If 2022/23 data is unavailable, please provide an estimate/forecast instead.

2021/22: \_\_\_\_\_

2022/23e\*\*: \_\_\_\_\_

### 21. In the most recently completed financial year, what percentage (%) of your organisation's UK-based space-related employees have obtained the following as their highest qualification?

Please provide an approximation if actual data is unavailable.

Master's degree or above (incl. PhD)	_____ %
Bachelor's degree	_____ %
Vocational qualification (HND/HNC)	_____ %
Other qualification	_____ %
Total: 100%	Sum=100 %

Please indicate how many apprentices you employed in the most recently completed financial year:

### 22. In the most recently completed financial year, what percentage (%) of your organisation's UK-based space-related employees have training in:

Please provide an approximation if actual data is unavailable.

Engineering	_____ %
Science and Mathematics	_____ %
Computer science	_____ %
Social sciences and finance	_____ %
Other areas of education or training	_____ %

### 23. Workforce composition

The Equality Act 2010 sets out the legal obligation for the UK Space Agency, as a UK public body, to consider the needs of all individuals in their day-to-day work in shaping policy and in

delivering services. Collecting relevant information on the protected characteristics covered by the Equality Duty is therefore extremely important.

**a) In the most recently completed financial year, what percentage (%) of your organisation’s UK-based space-related employees are:**

Please provide an approximation if actual data is unavailable.

For UK dual nationals, please record as a UK national.

UK nationals	_____ %
EU nationals	_____ %
Other nationals	_____ %
Total: 100%	Sum=100 %

**b) In the most recently completed financial year, what percentage (%) of your organisation’s UK-based space-related employees identify as:**

Please provide an approximation if actual data is unavailable.

Female	_____ %
Male	_____ %
Other (incl. non-binary)	_____ %
Total: 100%	Sum=100 %

**c) In the most recent year available, what percentage (%) of your organisation's UK-based space-related employees are:**

Please provide an approximation if actual data is unavailable.

Under 25	_____ %
25-34	_____ %
35-49	_____ %
50-64	_____ %
Over 64	_____ %
Total: 100%	Sum=100 %

**d) Based on your knowledge of the organisation’s workforce, can you estimate the percentage (%) of your organisation’s UK-based space-related employees that are:**

If you don't know or prefer not to answer please allocate the 'Don't know / prefer not to answer' option 100%.

White	_____ %
Asian or Asian British	_____ %
Black, Black British, Caribbean or African	_____ %
Mixed or multiple ethnic groups	_____ %
Other	_____ %

Don't know / Prefer not to answer [ ]  
Total: 100% Sum=100 %

e) **Based on your knowledge of the organisation's workforce, can you estimate the percentage (%) of your organisation's UK-based space-related employees that are openly:**

Disabled \_\_\_\_\_% Don't know / Prefer not to answer [ ]  
LGBTQ+ \_\_\_\_\_% Don't know / Prefer not to answer [ ]

f) **Based on your knowledge of your organisation, does your organisation acknowledge equality, diversity and inclusion opportunities and challenges?**

Please select one response.

- Yes, through formal communications and initiatives such as our company vision/mission, an EDI strategy, flexible HR policies, participation in Equality, Diversity, and Inclusion initiatives and events.
- Yes, through informal channels such as discussions with managers or talks from senior leaders.
- No, it is not openly discussed or acknowledged.

g) **Does your company have a flexible working policy?**

Please select one response.

- Yes
- No, but it allows flexible working adjustments informally
- No
- Don't know

## Staff education, training, and skills

**24. How many years of experience (employment) does the leader of your organisation's space activities have?**

'Leader' refers to the individual with authority over your space activities. This may be a CEO, Partner, Divisional Director, or another role that best describes the person responsible for the team(s) working on space activities.

Please provide an approximation if actual data is unavailable.

- a) Years of professional working experience in the UK space sector: \_\_\_\_\_ years
- b) Years of professional working experience outside the UK space sector: \_\_\_\_\_ years

**Please specify the sector(s) outside the space sector, if relevant:**



## Wider Impact

### 25. Which, if any, of the following UN Sustainable Development Goals do your organisation's space-related activities\* contribute to?

\* 'Space-related activities' = all activities which you selected in 'Space-related activities'. Please select all that apply.

- Goal 1 – No Poverty
- Goal 2 – Zero Hunger
- Goal 3 – Good Health and Well-Being
- Goal 4 – Quality Education
- Goal 5 – Gender Equality
- Goal 6 – Clean Water and Sanitation
- Goal 7 – Affordable and Clean Energy
- Goal 8 – Decent Work and Economic Growth
- Goal 9 – Industry, Innovation and Infrastructure
- Goal 10 – Reduced Inequalities
- Goal 11 – Sustainable Cities and Communities
- Goal 12 – Responsible Consumption and Production
- Goal 13 – Climate Action
- Goal 14 – Life Below Water
- Goal 15 – Life on Land
- Goal 16 – Peace, Justice and Strong Institutions
- Goal 17 – Partnerships for the Goals
- We do not track UN Sustainable Development Goals

### 26. Carbon emissions

#### a) Does your organisation estimate its carbon emissions?

Please select one response.

- Yes
- No

If 'Yes', continue to b.

If 'No', skip to 'Additional Comments'

**b) What is your organisation’s estimated carbon emissions for the most recently completed financial year?**

The three scopes of emissions are a categorisation of the different kinds of carbon emissions which your organisation creates in their own operations, and wider value chain.

Scope 1 covers emissions from sources that an organisation owns or controls directly – for example from burning fuel in your fleet of vehicles.

Scope 2 are emissions that a company causes indirectly and come from where the energy it purchases and uses is produced. For example, the emissions caused when generating the electricity that you use in our buildings would fall into this category.

Scope 3 encompasses emissions that are not produced by the company itself and are not the result of activities from assets owned or controlled by them, but by those that it’s indirectly responsible for up and down its value chain. An example of this is when you buy, use and dispose of products from suppliers. Scope 3 emissions include all sources not within the scope 1 and 2 boundaries.

For more information, please refer to p. 49 of [this guidance from the UK government](#).

If your organisation does not record emissions according to scope please enter your emissions for ‘Scope 1’ only.

<u>Scope</u>	<u>Estimated emissions</u>	<u>Unit (e.g. tonnes of CO<sub>2</sub>e)</u>
<b>Scope 1 (direct GHG emissions)</b>	_____	_____
<b>Scope 2 (Energy indirect emissions)</b>	_____	_____
<b>Scope 3 (other indirect, value chain emissions)</b>	_____	_____

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## Conclusion

If you are happy for your organisation's logo to be used in UKSA promotional material (e.g. maps of the UK space sector) at conferences and in online resources please send your logo as an email attachment to [sizeandhealth@londoneconomics.co.uk](mailto:sizeandhealth@londoneconomics.co.uk).

## Additional comments

If you have any additional comments relevant to this study, please provide them below:

## Contact details

If you are willing to be contacted for light-touch clarifying questions about the data you have provided or further research please provide your contact details.

## Survey Complete

Thank you for completing the survey.

We are very grateful for your input.

Please contact us at [sizeandhealth@londoneconomics.co.uk](mailto:sizeandhealth@londoneconomics.co.uk) if you wish to amend or withdraw any provided information.