

Size and Health of the UK Space Industry 2024 - Questionnaire

Welcome to the annual survey of the UK Space Sector

Commissioned by the UK Space Agency (UKSA), and the Department for Science, Innovation and Technology (DSIT), 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 and DSIT 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. Survey responses allow UKSA and DSIT to make evidence-based decisions about how to support the space sector and understand trends across measures including income, employment, and investment. This information is used to demonstrate the breadth and scale of the sector and justify public investment in space.

Dr Paul Bate, Chief Executive of the UKSA, and Sir Chris Bryant, Minister of State at DSIT, have written to you to explain the importance of your input. You can access their letter by clicking [this link](#).

Participation in this survey is **voluntary** and your decision to complete or not complete the survey will not affect your relationship with the UKSA or DSIT in any way. We are very grateful for you making the time to participate, and even approximate information or a partial response will be valuable.

Based on extensive feedback, **we have significantly reduced the survey size** for this year. There are 16 core questions covering UK operations in the **2021/22 and 2022/23 financial year** (with an estimate also requested for the **2023/24 financial year**) that should take around 20 minutes to complete. These questions concern high-level financial and employment data related to your organisation's space-related activities, as well as more detailed breakdowns of these figures. A further 4 supplementary questions consider broader aspects of your organisation.

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**, only aggregate results will be published, and only UKSA and DSIT will receive raw data – for more information, please consult our [data protection](#) and [privacy policy](#), and the [UKSA privacy policy](#).

The survey will **remain open until 29th November**. 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 (≤ 10 employees) _____
- Small or Medium-sized Enterprise, SME ($10 < \text{employees} < 250$) _____
- Large enterprise (≥ 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 '2022/23' financial year:

Day: _____

Month: _____

Space-related activities

1. 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

2. 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'.

	<u>Income</u> (gross)	<u>Unit</u> (£, £k, £m or £bn)
2022/23:	£ _____	_____
2023/24:	£ _____	_____

Please outline any notable developments explaining any significant increases/decreases in income since 2021/22:

Please indicate your degree of confidence in the 2023/24 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)

3. Considering UK space-related income in the most recently completed financial year, please estimate the breakdown by domain.

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)	_____%
Other	_____%
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

If you answered 'Other', please specify:

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

4. 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 the 'Space-related activities' section.

2022/23: _____

2023/24: _____

Please outline any notable developments explaining any significant increases/decreases in employment since 2021/22:

5. 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 space-related employees</u>
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%
_____	_____	_____	_____%

(Total=100%)

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

Supplier inputs

6. 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.

2022/23: _____%

2023/24: _____%

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:

7. Please estimate the breakdown of inputs by type and location of supplier in the most recent financial year available.

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.

Key financials

- 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

8. 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 \(more info\)](#).

UK (domestic)	_____ %
Europe (excl. ESA and UK)	_____ %
European Space Agency (any location)	_____ %
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:

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

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

<u>UK Space Agency</u>	_____ %
<u>European Space Agency</u>	_____ %
<u>Other Space Agency</u>	_____ %
<u>Other Civil Government</u> (including European Commission)	_____ %
<u>Defence/Military</u>	_____ %

Commercial

To Business (B2B) _____ %

To Consumer (B2C) _____ %

Research/Science Funding Bodies _____ %

Total: 100%

Sum=100%

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

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

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) _____ %

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	_____%
Polycymaking, regulation and oversight	_____%

Total: 100%

Sum=100%

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

Research & Development

11. 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).

	Expenditure	Unit (£, £k, £m or £bn)
2022/23:	£ _____	_____
2023/24:	£ _____	_____

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

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.

2022/23:	_____ %
2023/24:	_____ %

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

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).

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

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

Total investment

12. How much investment and revenue occurred in your organisation in the following years which can be directly attributed to receiving UKSA funding?

UKSA funding includes all funding awarded by UKSA – both UKSA national programmes, and ESA programmes where UK companies are eligible to participate.

If investment and/or revenue achieved is only partially as a result of UKSA/ESA funding, please include only that proportion which can be attributed to UKSA/ESA funding.

Please indicate value in £GBP millions.

Please provide an approximation if actual data is unavailable.

a) Match Funding:

Matched contributions provided by the organisation, as a condition of the funding agreement with UKSA.

2021/22:	£ _____ m
2022/23	£ _____ m
2023/24:	£ _____ m

b) Private Investment:

Private investment generated as a result of funding awarded by UKSA (whether that be UKSA or ESA funding). This includes money invested by companies, individuals, or financial organisation through the following vehicle: equity, grant, prize, debt, or alternative finance sources.

2021/22:	£ _____ m
2022/23	£ _____ m
2023/24:	£ _____ m

c) Internal Investment:

Internal Investment of funds made as a result of funding awarded by UKSA (whether that be UKSA or ESA funding). This includes investment within a company, or from a parent company to its subsidiary, to cover R&D, capital expenditures such as development of intellectual property (not including any match funding contribution).

2021/22:	£ _____ m
2022/23	£ _____ m
2023/24:	£ _____ m

d) Contract Revenue:

Additional income generated from the creation of goods and services, as a result of funding awarded by UKSA (whether that be UKSA or ESA funding). In the longer term, this may also include income generated from royalties and licenses.

2021/22:	£ _____ m
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Total investment

2022/23 £ _____ m
2023/24: £ _____ m

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 select all the potential obstacles that impacted your company's success in the last year (commercial, research, etc.)?

Please select all that apply. If none of these apply to your organisation, please only select 'none of the above'.

- Macroeconomic challenges (e.g. Cost of living (energy, inflation))
- Firm financial pressures
- Access to funding
- Human capital constraints
- Regulations
- Limitations on EU programme involvement
- None of the above

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

15. Please select all the key enablers that were relevant for your company's success in the last year (commercial, research, etc.)?

Please select all that apply. If none of these apply to your organisation, please only select 'none of the above'.

* Please refer to the list of designated space clusters found [here](#).

- National Space Strategy (NSS)
- Support and engagement with the UK Space Agency
- Increased spending 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
- Support or engagement with your local space cluster*
- Other(s) – please specify: _____
- None of the above

16. 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%)	Not Sure
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

17. 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 Q18.

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:

Employment, education, and skills

18. What was your total wage bill for your space-related UK 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'.

2022/23: _____

2023/24: _____

19. 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:

Workforce composition

The UK Space Agency, as a UK public body, has a responsibility to understand the make-up of the space sector. Collecting relevant information on protected characteristics is important in helping the UKSA understand the composition of the workforce and any disparities therein. Please note that we are asking for anonymous, aggregate counts, so nothing that should identify any individual. However, we recognise this data is sensitive and completion is entirely voluntary. Please only complete this section if you have access to accurate data on protected characteristics. Please also consider whether your organisation is allowed to share anonymous data on protected characteristics

20. Questions regarding protected characteristics

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

If your organisation does not collect this information, is unable to share this information, or you would prefer not to answer this question, please leave this question blank.

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

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

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

If your organisation does not collect this information, is unable to share this information, or you would prefer not to answer this question, please leave this question blank.

Female	_____ %
Male	_____ %
Other (incl. non-binary)	_____ %
Prefer not to say	_____ %
Total: 100%	Sum=100 %

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

If your organisation does not collect this information, is unable to share this information, or you would prefer not to answer this question, please leave this question blank.

Under 25	_____ %
25-34	_____ %
35-49	_____ %

50-64 _____ %
Over 64 _____ %
Total: 100% Sum=100 %

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

If your organisation does not collect this information, is unable to share this information, or you would prefer not to answer this question, please leave this question blank.

White _____ %
Asian or Asian British _____ %
Black, Black British, Caribbean or African _____ %
Mixed or multiple ethnic groups _____ %
Other _____ %
Total: 100% Sum=100 %

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

If your organisation does not collect this information, is unable to share this information, or you would prefer not to answer this question, please leave this question blank.

Disabled _____ %

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

If your organisation does not collect this information, is unable to share this information, or you would prefer not to answer this question, please leave this question blank.

LGBTQ+ _____ %

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.

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.

Engagement with your local space clusters

Are you willing for your organisation's name and address ONLY to be shared with your local space cluster?

Please refer to the list of designated space clusters found [here](#). Space clusters have been established across the UK to bring local space companies, academia, and government together to grow the space sector. They provide advice and business support, and enable collaboration with new partners, suppliers, and potential customers.

- Yes
- No

Survey Complete

Thank you for completing the survey.

We are very grateful for your input.

Please contact us at sizeandhealth@londoneconomics.co.uk if you wish to amend or withdraw any provided information.