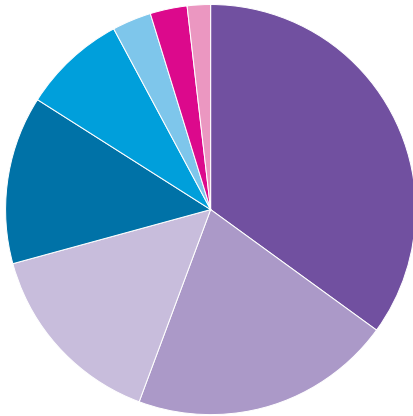


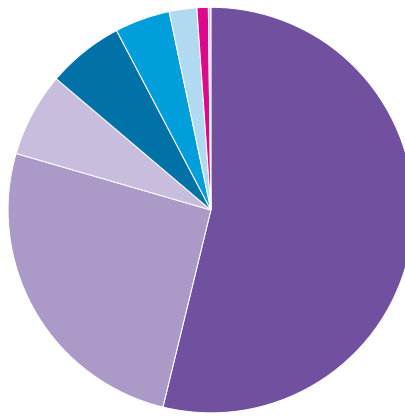
What do you believe is the main driver of innovation?



Cost efficiency	42%
Time constraints	24.8%
Sustainability	18.1%
Client demands	15.9%
Technology	9.8%
Other, please specify	3.7%
Global competition	3.5%
End user	2.2%

In the "other" category health and safety was the most common answer, followed by legislation and the environment. Other answers included: "curiosity", "making money" and "man's inherent obsession with progress".

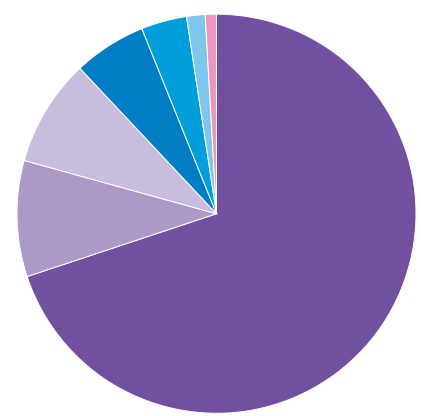
Which organisations do you believe hold responsibility for carrying out R&D?



All of the below	53.8%
Product manufacturers	25.7%
Professional bodies	6.7%
Academic institutions	6.1%
Government bodies	4.4%
Contractors	2.2%
Consultants	0.9%
Other, please specify	0.2%

Although very few respondents said "consultants" and "contractors", 53.8% answered "All of these" which encompasses both.

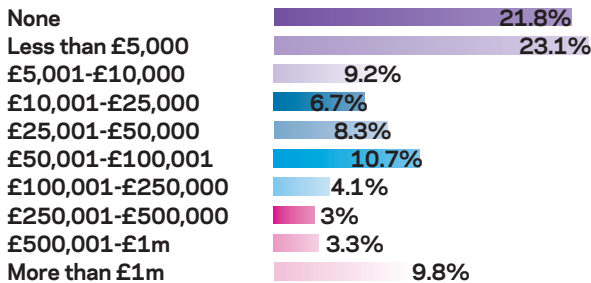
Which organisations do you believe produce most innovations?



Product manufacturers	69.9%
Contractors	9.4%
Academic institutions	8.7%
Professional bodies	5.9%
Consultants	3.7%
Government bodies	1.5%
Other, please specify	0.9%

"Other" answers specified included: "private sector", "collaboration between manufacturers" and "private individuals".

How much does your company invest in R&D annually?



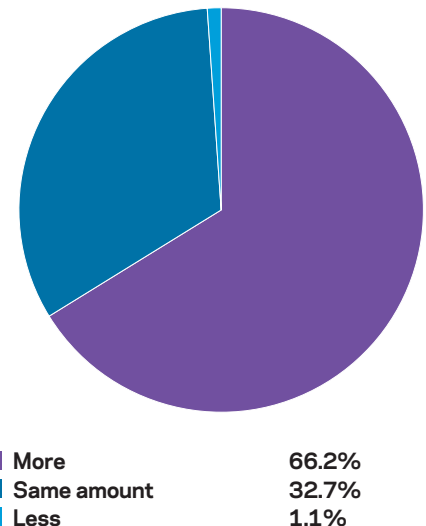
Of those respondents who work for companies employing up to 50 people, 41.6% said they invest nothing in R&D and 44.9% said they spend up to £5,000 per year. Only 9.7% of respondents from companies with an annual turnover of over £500m said they spend nothing.

If you had a £1m budget for innovation, what would you develop?

- The top five issues were:
- 1 Carbon reduction
 - 2 Sustainable energy/ energy efficiency
 - 3 Improved off-site fabrication
 - 4 Training
 - 5 Robotics



How much should your company invest?



Three-quarters (74.7%) of middle and junior managers and supervisors feel more needs to be invested in R&D. All of the 1.1% who said their company should spend less are company directors or senior managers.