

2015 Global Venture Capital Confidence Survey Results

Investors were asked to rate their **confidence level in each country**. Confidence levels were measured on a scale of 1 to 5, with 5 representing the most confidence. Basis points indicate year-over-year changes.

About survey

208 venture capital and private equity investors were surveyed from May to June 2015 representing 10 associations throughout North and South America, Africa, Europe, and Asia Pacific.

www.deloitte.com/us/2015vcsurvey

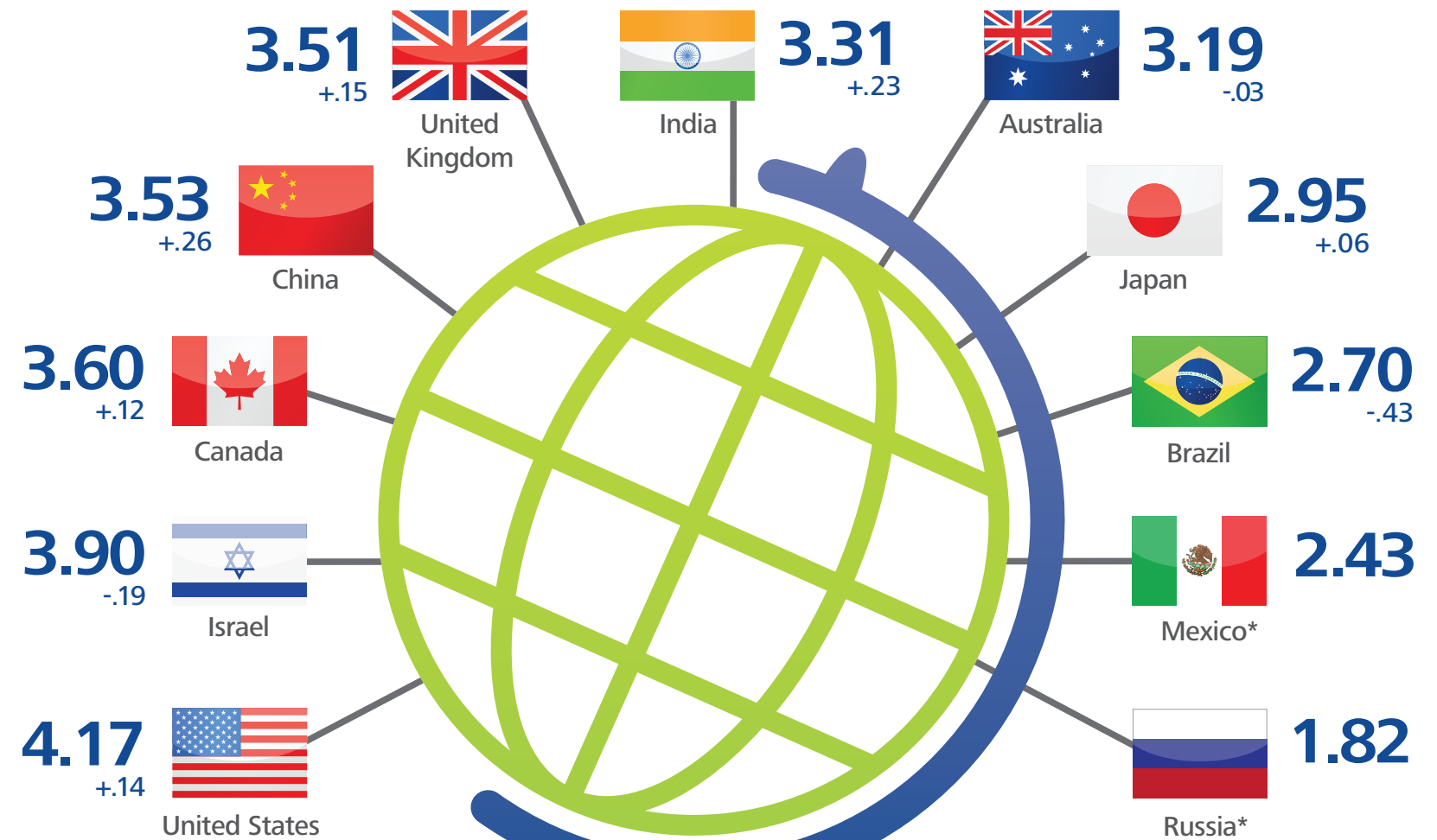


Follow #VCsurvey

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. Please see www.deloitte.com/about for a detailed description of DTTL and its member firms. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

Copyright © 2015 Deloitte Development LLC. All rights reserved.
Member of Deloitte Touche Tohmatsu Limited



*YoY data unavailable

2015 Global Venture Capital Confidence Survey Results

Investors were asked to rate their **confidence level in major U.S. metros**. Confidence levels were measured on a scale of 1 to 5, with 5 representing the most confidence. Dollar amounts indicate venture capital investment dollars received in 2015 through Q2.

Key finding

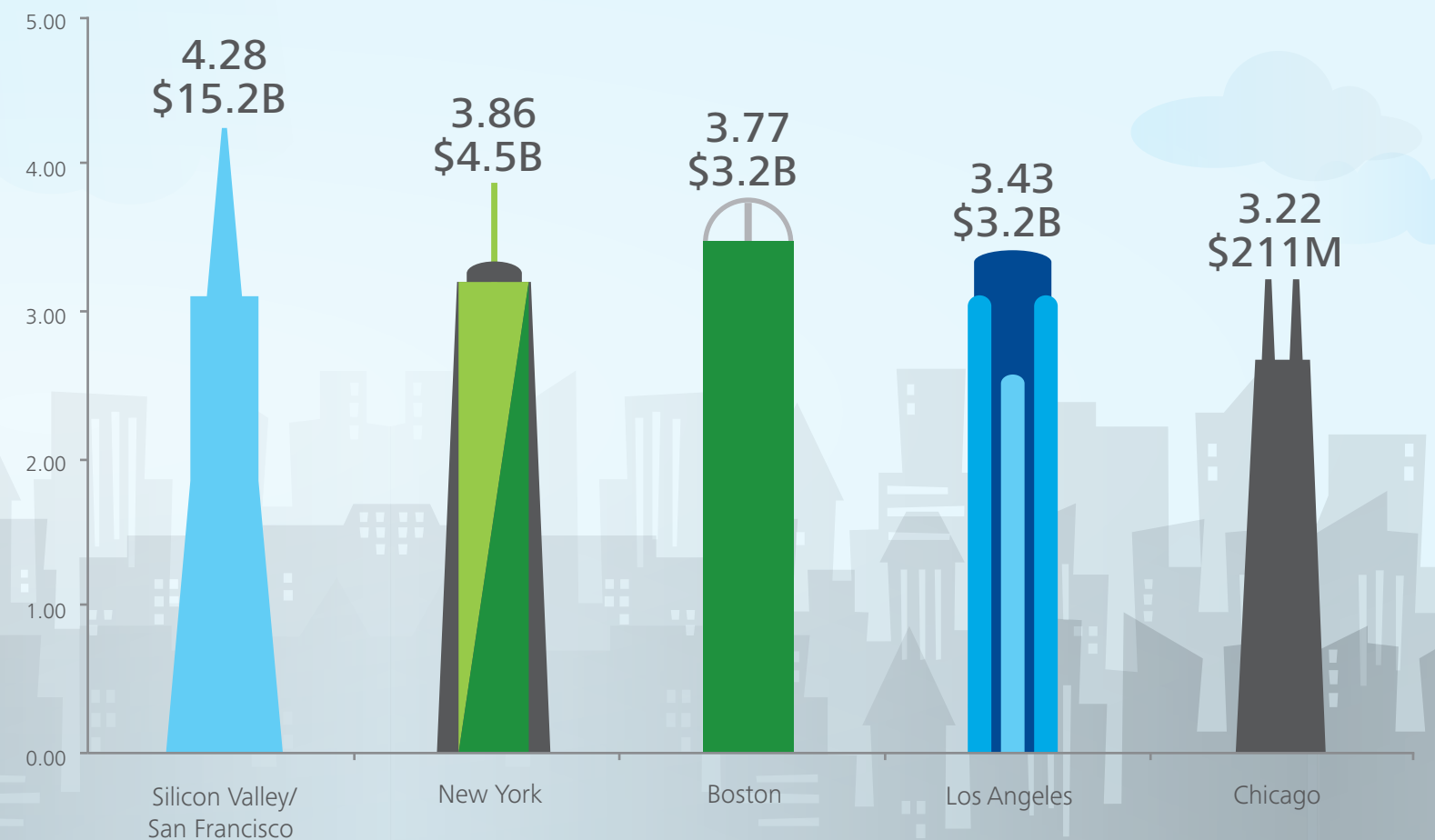
Metro areas with the highest confidence ratings have received the highest venture capital investment through Q2 2015.



Follow #VCsurvey

About survey

208 venture capital and private equity investors were surveyed from May to June 2015 representing 10 associations throughout North and South America, Africa, Europe, and Asia Pacific.



www.deloitte.com/us/2015vcsurvey

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. Please see www.deloitte.com/about for a detailed description of DTTL and its member firms. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

2015 Global Venture Capital Confidence Survey Results

Investors were asked to select their **top two initiatives they would like to see public policy leaders take on in their home country**. Percentages were based on the total number of responses.

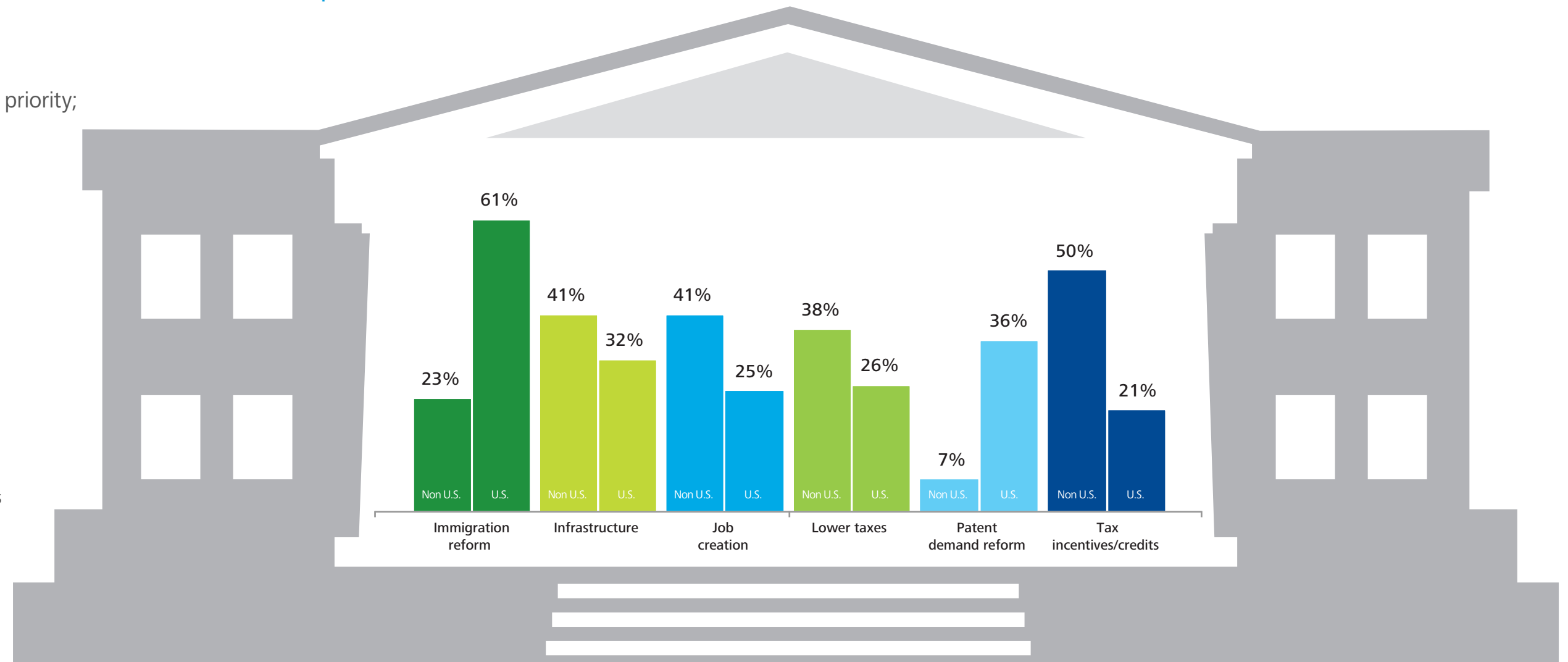
Key finding

U.S. finds immigration reform a priority; non-U.S. finds tax incentives.

About survey

208 venture capital and private equity investors were surveyed from May to June 2015 representing 10 associations throughout North and South America, Africa, Europe, and Asia Pacific.

Follow #VCsurvey



www.deloitte.com/us/2015vcsurvey

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. Please see www.deloitte.com/about for a detailed description of DTTL and its member firms. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

2015 Global Venture Capital Confidence Survey Results

Investors were asked to rate their **confidence level in each sector**. Confidence levels were measured on a scale of 1 to 5, with 5 representing the most confidence. Basis points indicate year-over-year changes.

 Follow #VCsurvey

Key finding

Cloud computing/SaaS tops the ratings two years running.

About survey

166 venture capital investors were surveyed from May to June 2015 representing 10 associations throughout North and South America, Africa, Europe, and Asia Pacific.

www.deloitte.com/us/2015vcsurvey

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. Please see www.deloitte.com/about for a detailed description of DTTL and its member firms. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

