

# Department for International Trade National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs

## Exporting is GREAT - Campaign Evaluation Report



 **EXPORTING  
IS  
GREAT**  
BRITAIN & NORTHERN IRELAND

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# 1 Executive summary

## 1.1 Aims

This summary describes the key findings of the initial phases of the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs. The survey was designed with a view to:

- Establishing a baseline measure for the *Exporting is GREAT* campaign
- Providing a measure of the size of the opportunity and challenge for DIT in terms of the proportion and number of companies falling into different exporting segments
- Determining the current barriers to exporting
- Understanding the types of support required and currently used by businesses
- Monitoring whether businesses' attitudes towards exporting change over the duration of the campaign
- Tracking whether businesses' exporting behaviours change over the duration of the campaign
- Identifying how the campaign is performing

By providing evidence in all of the areas above, the intention is that the survey will support DIT in the development of products, services and future campaigns that will help to address the needs of the business community and, ultimately, contribute to an increase in the volume and value of exports.

It should be noted that some of the figures quoted in this report differ from those derived from the Annual Business Survey (ABS). The ONS ABS is used to monitor the percentage and number of exporters in GB.<sup>1</sup> The two surveys, while having some shared content, have different methodologies and different fundamental objectives.

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<sup>1</sup> <http://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey>

## 1.2 Method

The research was conducted using a CATI method (Computer Assisted Telephone Interviewing). Interviews were undertaken with the senior manager who was best qualified to talk about specifics of the business – typically the owner, proprietor, Managing Director or another senior decision maker.

At the time of this report, two waves of interviewing have been conducted. Wave 1 ran from 20<sup>th</sup> October to 6<sup>th</sup> November 2015 and was timed such that interviewing was completed before the first burst of campaign activity began. Wave 2 ran from 1<sup>st</sup> April to 4<sup>th</sup> May 2016 and was timed such that interviewing began immediately after the initial bursts of campaign activity had been completed. As such, Waves 1 and 2 provide pre-campaign and post-campaign data. Around 1,400 interviews were conducted in each wave. It should be noted that the survey data are not longitudinal – a separate sample of businesses was interviewed at each wave.

The survey deliberately over-sampled £500k+ SMEs and MSBs with a turnover of up to £500m as these were seen as being key to the aim of growing the number of exporters (being large enough to contribute significantly to the export market but not so large that they would almost certainly have already conducted full assessments of their potential for exporting). As such, this group is the main focus of reporting, though key findings amongst the wider population of businesses are also quoted.

Weights were applied in order to bring the sample profile in line with the total population of UK businesses.

## 1.3 Key findings

When interpreting the findings of the survey, it is important to bear in mind the fact that fieldwork took place at a time when the EU referendum campaign was in progress - this is likely to have impacted on results (particularly in terms of attitudinal measures). It is not possible to quantify this impact as there is no counterfactual to tell us how the data between Waves 1 and 2 would have changed if there had *not* been a referendum, but it remains an important point to consider. Both waves of the survey were completed prior to the announcement of the referendum result – as such, future waves will be valuable in determining how behaviours and attitudes change in the months and years after the referendum.

### 1.3.1 Registered businesses' exporting experience

Businesses were segmented according to where they sit on the pathway to exporting, as follows:

**Figure 1.1: Exporting segments**

#### **Sustain**

Sustain is made up of '**current exporters**' which have exported goods or services in the past 12 months.

#### **Reassure**

Reassure consists of businesses which **haven't exported in the past 12 months, but which had exported previously.**

#### **Promote**

Promote incorporates those businesses which **have never exported but which self-identify as having goods or services which could potentially be exported or developed for export.**

#### **Challenge**

Challenge consists of companies which **have never exported and do not currently see their goods or services as suitable for export.**

As shown in Figure 1.2, around one in seven businesses (15%) do not currently export, but say that their products or services could be exported or could be developed for export (the 'Promote' segment). As the population of UK Registered Businesses was 2,449,000 as of March 2015, this suggests that there are around 363,000<sup>2</sup> registered businesses in the UK that could potentially be exporters and which are already aware of this potential to some extent.

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<sup>2</sup> ONS Statistical Bulletin: UK Business: Activity, size and location: 2015

<http://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/ukbusinessactivitysizeandlocation/2015-10-06>

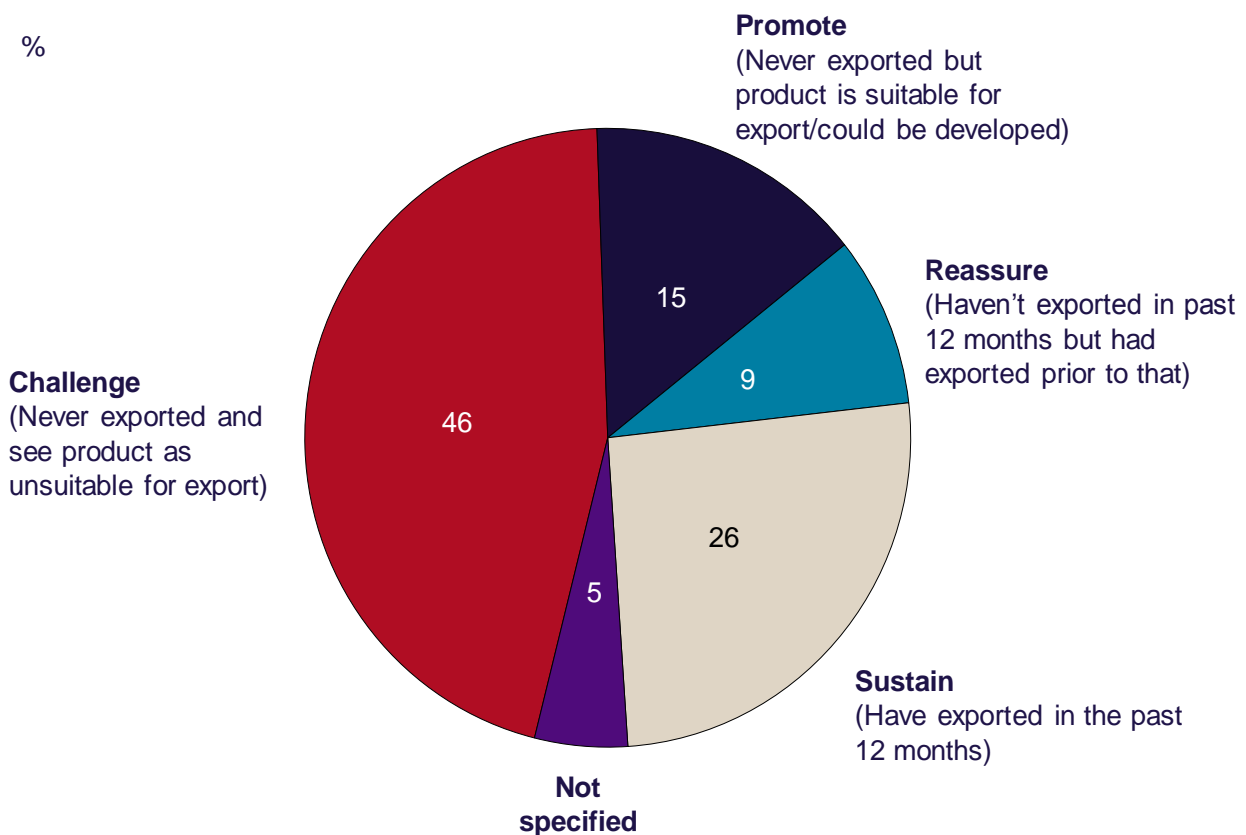
Taking into account the margin of error around these data at a 95% certainty level, the value may lie within around  $\pm 85,000$  of the 363,000 figure (i.e. between 278,000 and 448,000).

Overall around a quarter of all businesses (26%) had exported goods or services in the past 12 months and therefore fell into the Sustain segment at Wave 2.

Around one in ten (9%) of all businesses had not exported in the past 12 months but had done so at some point in the past and therefore fell into the Reassure segment at Wave 2.

Finally, around half of all businesses (46%) felt that their products were intrinsically unsuitable for export and therefore fall into the Challenge segment.

**Figure 1.2: The proportion of businesses at different stages of the exporting journey**



Source: Composite measure merging data from several variables  
Base : All respondents (1418)

To date there have been no significant changes in exporting status between Waves 1 and 2 – this is perhaps to be expected bearing in mind the fact that interviewing in the two waves was conducted

Please note that this number relates to businesses that say they have a product to export or which could be developed for export - it does not provide a view as to whether the business is 'export ready' or has the capacity to export on a sustainable basis.



around six months apart and there will typically be lead times associated with the process of starting to export.

The proportion of companies falling into the Promote segment was similar across the five broad industry sectors, ranging from 10% for firms in the distribution and finance/professional/technical and creative sectors, up to 14% for businesses in manufacturing and infrastructure.

Only 3% of all businesses and 2% of £500k+ SMEs/MSBs, which had not exported recently, had plans or an active interest in starting to export. However, amongst the *Exporting is GREAT* campaign's key target segment (Promote), the proportion was markedly higher – 10% of Promote businesses at Wave 2 were actively looking to export and 4% planned to do so within the next 12 months.

### Potential policy and campaign implications

Companies which fall into each of the exporting segments are likely to require different types of support in order to continue or begin their exporting journey. In order to overcome the barriers discussed later in this summary, the provision of such support would seem to be vital in achieving the governments' aim to increase the number of exporters and the value of the goods which they export. Evidence suggests that the tailoring of support is important as untargeted or ill-targeted messaging can actually serve as a disincentive to potential exporters.

A communications approach which serves to reinforce views of current exporters (perhaps based on growth potential and aspiration) might not be the best message for non-exporters who have been shown to be dissuaded by a series of potentially compounding issues such as risk aversion, being happy just trading nationally, aversion to paperwork, previous bad export experiences and lack of knowledge. Such messaging may entrench non-exporters even further in their attitudes – as this group appear less likely to identify with highly aspirational messages which focus on rapid growth and are likely to need a more nurturing communication strategy. Undertaking in-depth research on the specific attitudes, behaviours, needs and barriers for each segment will be key to informing future decision making.

### Figure 1.3: Exporting segments

#### Sustain

Sustain is made up of '**current exporters**' which have exported goods or services in the past 12 months.

A quarter of all businesses (26%) and a third of £500k+ SMEs/MSBs (33%) had exported goods or services in the past 12 months and therefore fell into the Sustain segment at Wave 2. As such, while moving businesses from the Promote segment to the Sustain segment will be vital if the number of exporters is to be increased, it is also important to minimise the number of current exporters which

fall out of the Sustain segment. Maintaining a Sustain exporter is essentially as important as converting a Promote exporter.

### Reassure

Reassure consists of businesses which ***haven't exported in the past 12 months, but which had exported previously.***

This segment covers firms with a range of experiences – some may have faced genuine, seemingly intractable challenges when it came to exporting in the past; others may have been affected by temporary factors such as fluctuating exchange rates; and others may simply have refocused their business or temporarily lost an overseas contract. Research from the Federation of Small Businesses suggests that many lapsed exporters would be open to exporting again in the future.<sup>3</sup> The diversity of this segment means that there are challenges in communicating to them as a whole but reassurance is a fundamental element (e.g. messaging that the challenges of the past might not be such a major factor nowadays and that support is available / providing examples of businesses which succeeded at the second attempt).

### Promote

Promote incorporates those businesses which ***have never exported but which self-identify as having goods or services which could potentially be exported or developed for export.***

This segment is the key target for growing the exporting market and the focus of the *Exporting is GREAT* campaign. Businesses in this segment will need a blend of encouragement and practical support if they are to make the transition from having a general sense of their own exporting potential to actually starting to export.

### Challenge

Challenge consists of companies which ***have never exported and do not currently see their goods or services as suitable for export.***

Some of these businesses may genuinely be unable to export their products but in many cases the

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<sup>3</sup> Chung, C and McTague, M (2016) “*Destination Export – The Small Business Landscape*”

<http://www.fsb.org.uk/docs/default-source/Publications/reports/fsb-destination-export-report-2016.pdf?sfvrsn=0>

lack of belief in their ability to export may well be perceptual rather than absolutely reflective of their situation. As such, it is potentially valuable to make such businesses question their own assumptions. The journey to exporting for those in the Challenge segment is longer than that of other companies – effectively they need to be moved to the Promote segment (i.e. to realise the potential of their business where appropriate) and then receive the further inputs detailed above in order to complete their move into the export market.

The finding that there was a similar proportion of businesses in the Promote segment, regardless of their broad industry category, suggests that there is a broad base of potential new exporters and they are not bunkered in a single specific part of the economy. As such, it appears that campaign messaging should continue to highlight a wide range of companies.

### **1.3.2 What are businesses' attitudes towards growth and exporting?**

At Wave 2 the majority of businesses said that they were aiming for steady sustainable growth rather than rapid growth (62% of all businesses and 72% of £500k+ SMEs/MSBs).

Businesses in the Promote and Sustain/Reassure segments were more growth focused than those in the Challenge segment. More than eight in ten businesses in the Promote segment (81%) were aiming for either steady or rapid growth.

Around half of businesses had introduced new or significantly improved products in the past 12 months (49% amongst all businesses and 54% amongst £500k+ SMEs/MSBs). At Wave 2 the Promote (55%) and Sustain/Reassure (62%) segments were more likely to have innovated in the past 12 months than those in the Challenge segment (46%).

The majority of businesses agreed (either strongly or slightly) that there is 'a lot of demand for British products or services around the world'. At Wave 2, around seven in ten of all businesses (70%) and £500k+ SMEs/MSBs (68%) agreed with this statement.

£500k+ SMEs/MSBs which were aware of the *Exporting is GREAT* campaign were more likely to agree that there is a lot of demand for British products or services than those which had not seen the campaign (75% and 64% respectively).

A majority of businesses felt that 'international growth is an exciting prospect for my business' (65%) and there was also widespread agreement that 'there is a lot of opportunity for my business to grow internationally' (61%) at Wave 2. However, there was less positivity in these measures amongst businesses in the Promote segment. Only 35% of Promote businesses agreed that international growth was an exciting prospect and 39% felt that there was a lot of opportunity for international growth.

At Wave 2 only around a third of all businesses (31%) and a quarter of businesses in the Promote segment (27%) agreed that there 'is a lot of support available to help small and medium businesses start exporting'.

### **Potential policy and campaign implications**

The fact that eight in ten businesses in the Promote segment (81%) were aiming for either steady or rapid growth supports the view that this segment should be targeted in any activities aimed to increase the number of exporters – messages which underline the growth opportunities associated with exporting are likely to be positively received by this segment. However, the tone of any such messages should avoid a focus on rapid change as this may actually be off-putting to businesses whose focus is very much on steady sustainable growth rather than rapid growth.

The finding that businesses in the Challenge segment (46%) were less likely to have innovated in the past 12 months than those in the Promote (55%) and Sustain/Reassure (62%) segments again suggests that the Challenge segment will be harder to convert to exporting than the Promote segment - they appear less open to innovation and, by implication, change.

The finding that £500k+ SMEs/MSBs which were aware of the *Exporting is GREAT* campaign were more likely to agree that there is a lot of demand for British products or services than those which had not seen the campaign suggests that the campaign was successful in influencing perceptions. While the difference cannot be firmly attributed to the campaign, bearing in mind the key messages of the various advertisements it is likely to have played at least some role in this difference.

It is encouraging that companies which had innovated in the past 12 months were more likely to agree that there is overseas demand for British products than those which had not (72% and 63% respectively). This suggests that the most dynamic companies are also the most positive about potential demand for British exports.

There were, however, signs of challenges in terms of the Promote segment. Fewer Promote businesses agreed that international growth was an exciting prospect or felt that there was a lot of opportunity for international growth. As this segment is a key target for growing the pool of exporters, improving their perceptions in this regard would seem to be a priority.

The low proportion of companies (particularly in the Promote segment) which agreed that there 'is a lot of support available to help small and medium businesses start exporting' is potentially a cause for concern. Bearing in mind the wide range of perceived barriers identified by the research it would seem highly important that businesses feel supported. As such, strong messaging on this topic (and ideally the provision of services that support their needs) would seem vital if the number of exporters is to be significantly increased.

### 1.3.3 How much do businesses know about exporting and what support do they need to overcome perceived barriers?

Only around a quarter (27%) of businesses which had exported or felt that exporting was potentially possible reported having a high level of knowledge about *how* to export.

Half of businesses in the Sustain/Reassure segment (50%) only rated their knowledge of exporting within the 'moderate' range in spite of the fact they were current or lapsed exporters.

Between Waves 1 and 2, there was a significant increase in the proportion of businesses in the Promote segment which felt that they had a moderate level of knowledge about how to export (28% at Wave 1 compared to 53% at Wave 2). This was accompanied by a decline of a similar size in the proportion of such businesses with a low level of knowledge.

However, the proportion of Promote companies with a high level of knowledge was only 7% at Wave 2 and did not increase between waves.

Only 30% of all companies for whom exporting was seen as possible reported a high level of knowledge about where to go for information about exporting.

Even amongst the exporters/former exporters in the Sustain/Reassure segment, almost two thirds (63%) had moderate to low levels of knowledge about exporting information sources.

The most frequently mentioned barriers to exporting were that it would be too costly (13%) or that it would be challenging to deal with legal or tax regulations and standards (13%). However a wide range of barriers was mentioned, with none being the dominant factor – different businesses had different concerns.

Relatively few businesses had sought advice or support about exporting (30%). Even amongst those in the Sustain/Reassure segments, who had actively engaged in exporting, only around four in ten (43% at Wave 2) had ever sought advice or support.

Amongst those who believed their products were potentially suitable for export, the most common choice when asked what they would do if they were looking for support, advice or information about exporting was to search online or use Google. This general response was given by 33% of all businesses and by 32% of £500k+ SMEs/MSBs. To a certain extent this can be viewed as a response which indicates that these respondents didn't actually know where they could get support, advice or information. A further 10% of £500k+ SMEs/MSBs and 9% of all businesses explicitly said that they did not know.

The provision of potential customer contacts was the type of support which was most widely seen as useful (mentioned by 74% of £500k+ SMEs/MSBs). However, amongst those companies open to the idea of getting external input, there was a widespread view that most types of support would be useful.

## Potential policy and campaign implications

The relatively modest self-reported knowledge of exporting amongst senior decision makers suggests that there is a certain lack of confidence at play, even amongst those companies which currently export or have exported in the past. As such, the potential benefit of continuing to provide information support to current and lapsed exporters should not be overlooked.

Although there are signs of improvement in knowledge levels relating to exporting in the Promote segment, this appears to have been around relatively low thresholds (i.e. businesses moved from low to moderate knowledge levels rather than from moderate to high). As such, it would seem important to focus on improving knowledge levels, potentially by signposting to relevant support services. This would appear to be potentially beneficial to a broad spectrum of businesses, including those who currently export.

It was apparent that a wide range of barriers to exporting were cited by businesses and messaging on each of them separately in future campaign activity would be challenging. As such, it may be a more realistic aim to message more generally along the lines that 'support is available'.

Highlighting a single central source of information (even if it is one that refers onwards to other organisations or websites) would seem a good way to ensure that businesses are clearer about the support available to them. This is particularly the case given the large diversity of responses given by businesses when asked about where they would go for information about exporting. This, coupled with the high proportion saying that they would have to search online for information (or that they simply didn't know where to source it), suggests that there is a lack of any clear pathway to obtaining information about exporting. This again underlines the potential benefits of messaging on support in later stages of the *Exporting is GREAT* campaign and establishing a 'brand' in terms of a single website or organisation that should be businesses' first port of call when they are seeking support or information. There has already been messaging relating to the *Exporting is GREAT* website, which would seem to offer a natural fit, but this would need to be made a more central element of any communications activities if awareness is to increase significantly.

More immediately, it will also be vital to ensure that GREAT landing pages (or other government advice sites) continue to feature strongly in any online search results. Bearing in mind the recent changes to departmental structure, it will also be necessary to ensure strong signposting from legacy UKTI sites/helplines to the new DIT equivalents.

It appears that the majority of exporters effectively go it alone (as relatively few have sought formal support or advice). This would appear to represent an opportunity, particularly in respect to the objective of increasing the value of exports – providing additional support to current exporters may well help them to expand their operations into new markets or product lines.

### 1.3.4 Were businesses aware of the *Exporting is GREAT* campaign and influenced by it?

Spontaneous awareness of 'any information or advertising encouraging businesses to think about exporting' doubled among all businesses, from 15% at Wave 1 (pre-campaign) to 31% at Wave 2 (post-campaign).

When prompted with the campaign materials, just under half of businesses recognised at least one of the ads: 48% of all businesses and 45% of £500k+ SMEs/MSBs. This compares favourably to campaign awareness levels after an equivalent level of spend in the *Business is GREAT* campaign (where prompted awareness was 36%).

More than a quarter (28%) of all businesses viewing the ads said that they had increased their interest in finding out more about exporting.

Overall 14% of businesses reported that the campaign had made them more confident about exporting.

It is estimated that 5% of all UK businesses took some action as a result of seeing the campaign, with around 1% claiming to visit the *Exporting is GREAT* website (the ads' main call to action). Assuming a population of 2,449,000 UK registered businesses, this equates to around 110,000 UK businesses taking some action.<sup>4</sup> The proportion of businesses taking action was higher amongst those in the Sustain/Reassure segments (8%) than amongst those in the Promote/Challenge segments (3%).

#### Potential policy and campaign implications

The *Exporting is GREAT* campaign appears to have performed relatively well in terms of cutting through to businesses and the use of TV ads in the mix appears to have been a significant factor in this respect. Press ads did, however, also perform well, particularly in terms of the ratio between ad spend and recall.

Beyond advertising recall, the lack of a counterfactual makes it hard to determine how well the campaign performed in terms of communicating specific messages, particularly against the backdrop of the EU referendum campaign. However, as highlighted earlier it does appear that perceptions that there is overseas demand for British products have strengthened (and a majority of companies share this view).

As discussed earlier, there are potentially other messages which could usefully be communicated in future activities, particularly around the concept that 'support is available'.

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<sup>4</sup> The figure of 110,000 was calculated using the unrounded proportion of businesses taking action (4.57%). As there is a margin of error associated with survey percentages, the true value for the number of businesses taking action will lie somewhere between circa 60,000 and 164,000.

The *Exporting is GREAT* campaign has already succeeded in prompting a significant number of businesses to take action. However, it does not yet appear to have had a direct impact on the number of businesses which have started to export. At this stage, this is likely to be at least partly a function of the relatively long lead times between companies starting to consider exporting and actually going on to do so. However, the fact that companies that already had experience of exporting were more likely to have been spurred to action than those in the Promote/Challenge segments highlights the challenges of cutting through to totally new exporters. As such, future waves of the survey will be valuable in determining the longer term campaign impacts.



## 2 Policy background

This chapter provides an overview of the background to the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs which was run as part of the *Exporting is GREAT* campaign evaluation. The chapter outlines key underlying policy objectives as well as the macroeconomic factors which should be borne in mind when considering the findings of this report.

It is also important to bear in mind the survey's methodology when interpreting any survey data, particularly when drawing comparisons with the Annual Business Survey – this is discussed further in Section 3.2.

### 2.1 Policy background

The *Exporting is GREAT* campaign is an important element in the drive to boost first-time exporters. As a result of the EU referendum held in June there have been substantial changes in the structures of the government bodies tasked with leading UK business policy development. Two new government departments were created in July 2016 – the Department of Business, Energy and Industrial Strategy (BEIS) and the Department for International Trade (DIT). As such, while UKTI was the commissioning department for the programme of research described in this report, it is now DIT which will be tasked with acting on these findings, working in close cooperation with BEIS to ensure that all related initiatives are coordinated efficiently.

### 2.2 The *Exporting is GREAT* campaign

As a key component of the package of measures aimed to boost the number of UK exporters, UKTI commissioned a multi-channel campaign under the *Exporting is GREAT* banner, which is scheduled to run across a number of phases over a five year period. The campaign aims to contribute to the generation of additional exporters.

More specifically, the campaign objectives in the first phase, which is the focus of this report, were to:

- Connect with businesses in the UK who do not consider exporting because they don't believe there is suitable demand for their products and services
- Make more firms aware of the opportunities available to them from overseas sales (and where they can go for advice, help and support);
- Generate a positive change in firms' attitudes and behaviour towards overseas sales as an opportunity (for growth, additional profit, sales);
- Generate a pipeline of firms taking active steps towards making overseas sales.

Alongside advertising activities on TV, radio, posters, online and in the press, the campaign also provides businesses with live, tangible export opportunities on the Exporting is GREAT Website, as well as advice and information to aid them in exporting. Examples of the various campaign materials are shown in Chapter 7.

The core target for the campaign is SMEs/MSBs with an annual turnover of £500k or more.<sup>5</sup> It is known that 71% of current registered exporters have an annual turnover of less than £1m while 89% of registered exporters have a turnover of less than £5m.<sup>6</sup> As such, while larger companies are absolutely essential to the health of the UK exporting market, SMEs/MSBs are also highly important. The campaign's targeting of SMEs/MSBs with a turnover of £500k or more was also based on the fact that these are the types of company most likely to be in a stronger position to be able to start exporting. Larger companies which do not currently export are likely to have already made an informed decision about the viability of exporting and will therefore be less open to exploring this avenue further.

Ultimately the success of the campaign will be measured by the number of new businesses that start exporting. However, given that there is a significant time lag between deciding to export and actually starting to export, the primary focus at this stage (when the campaign has been running for less than a year) is on monitoring businesses' intentions regarding exporting.

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<sup>5</sup> SME stands for Small and Medium sized Enterprises - these are defined as having between 1 and 249 employees and a turnover of less than £25m. For the purpose of this publication MSB stands for Mid-Sized Businesses - these are defined as having at least one employee and a turnover of £25m up to £500m.

<sup>6</sup> ABS Importers and exporters of goods and services by employment size, turnover size, ownership and age. 2011 to 2014

<http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/publications/reference-tables.html?edition=tcm%3A77-420005>

### 3 Survey objectives and methodology

This chapter outlines the fundamental objectives of the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs, whose findings are detailed in this report. It also gives an overview of the survey methodology and outlines the limitations of the survey and its differences from existing data sources. Further details of the survey methodology are included in the Technical Report which is published alongside this main report.

#### 3.1 Survey objectives

The DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs survey was commissioned with a view to:

- Establishing a baseline measure for the *Exporting is GREAT* campaign
- Providing a measure of the size of the opportunity and challenge for DIT in terms of the proportion and number of companies falling into different exporting segments
- Determining the current barriers to exporting
- Understanding the types of support required and currently used by businesses
- Monitoring whether businesses' attitudes towards exporting change over the duration of the campaign
  - Key focus on businesses' perception that there is strong international demand for UK products (reflecting the key message of the *Exporting is GREAT* campaign)
  - Also a focus on whether businesses believe that their goods or services could potentially be exported
- Tracking whether businesses' exporting behaviours change over the duration of the campaign
  - Focus on whether active steps are being taken towards exporting
- Identifying how the campaign is performing
  - How well different elements of the campaign are cutting through
  - Whether businesses attribute changes in behaviour to the campaign

Many of these top level objectives encompass a range of measures which are described fully in the following chapters.

### 3.2 Comparisons to the Annual Business Survey

It should be noted that some of the figures quoted in this report differ from those derived from the Annual Business Survey (ABS). The ONS ABS is used to monitor the percentage and number of exporters in GB.<sup>7</sup> The two surveys, while having some shared content, have different methodologies and different fundamental objectives.

There are a number of reasons for the differences in estimates between the ABS and the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs. Foremost amongst these are:

- The ABS specifically targets sectors which account for around two thirds of the total economy and excludes sub-categories including much of the finance and agriculture sectors. In contrast, the results from the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs include all sectors (with the exception of the public sector and charities).<sup>8</sup>
- ABS covers businesses in Great Britain while the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs covers businesses in the UK.
- ABS respondents provide answers in the context of their reporting unit, whereas the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs collected data at an enterprise level. This means that ABS might record a smaller proportion of 'exporters' amongst its survey population (essentially because there are some companies which are made up of a mixture of units which export and units which do not).
- There are also methodological differences between the two surveys which may also have had some impact on the data:
  - Different survey modes were employed. The ABS is conducted using a Pencil and Paper (PAPI) self-completion method, while the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs uses a Computer Assisted Telephone Interviewing (CATI) method.
  - The DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs employed quotas rather than stratified random probability sampling to ensure a sufficient representation of different types of enterprise.

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<sup>7</sup> <http://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey>

<sup>8</sup> More specifically, the Exporting is GREAT sample was selected to include enterprises with a legal status of 1 (company), 2 (sole proprietor) or 3 (partnership) in the Inter-Departmental Business Register (IDBR).

Although the resulting data are weighted to reflect the population of IDBR this could still have an effect

- The ABS is based on a survey of over 60,000 reporting units while the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs has a sample size of 1,400 respondents. Both surveys have margins of error (confidence intervals) around the estimates that they produce.

### *3.3 Changing geopolitical landscape and survey results*

The fieldwork for Wave 1 of the DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs survey was conducted in October/November 2015, while Wave 2 interviews were carried out in April/May 2016. As such, the possible impact of the EU referendum campaign (which was active in the months leading up to the referendum itself on 23<sup>rd</sup> June 2016), should be borne in mind when interpreting the data in this report.

In the absence of a counterfactual showing how respondents' views would have differed in the event that the referendum campaign had not taken place, it is impossible to be certain of the effect that it had on the metrics described in this report and how it will have affected behaviours and views in the months subsequent to fieldwork taking place. Nevertheless, as underlined by the findings described in this report, it appears that any support that can be provided, whether from government or from other businesses which are experienced in the exporting sector, is likely to be strongly welcomed.

### *3.4 Methodology*

#### **3.4.1 Overview**

The research was conducted using a CATI method (Computer Assisted Telephone Interviewing). Interviews were undertaken with the senior manager who was best qualified to talk about specifics of the business – typically the owner, proprietor, MD or another senior decision maker.

At the time of this report, two waves of interviewing have been conducted. Wave 1 ran from 20<sup>th</sup> October to 6<sup>th</sup> November 2015 and was timed such that interviewing was completed before the first burst of campaign activity began. Wave 2 ran from 1<sup>st</sup> April to 4<sup>th</sup> May 2016 and was timed such that interviewing began immediately after the initial bursts of campaign activity had been completed. As such, Waves 1 and 2 provide pre-campaign and post-campaign data.

It should be noted that the survey data are not longitudinal – a separate sample of businesses was interviewed at each wave.

Interviews lasted an average of 12 minutes at Wave 1 and 17 minutes at Wave 2.<sup>9</sup>

During the Wave 2 telephone interview, respondents were directed to a website which allowed them to view campaign materials during the course of the interview.

### 3.4.2 Company size definitions

Company size is one of the most important variables which is used to divide the total sample into sub-groups throughout this report.

The report focuses primarily on three different company size groups, as follows:

- **£500k+ SMEs** (Micro, Small and Medium sized Enterprises) – defined as having between 1 and 249 employees and a turnover of £500k up to £25m. They comprise around 19% of the population of registered business.<sup>10</sup>
- **MSBs** (Mid-Sized Businesses) – defined as having a turnover of £25m up to £500m and more than one employee. These comprise less than 1% of registered businesses.
- **Other businesses** – which consists of all other businesses within the IDBR (Inter-Departmental Business Register) population. The majority of businesses in this group are SMEs with a turnover of less than £500k, but it also includes large businesses with a turnover of £500m or higher.

The MSB definition above was chosen on the basis that it is relatively comparable with definitions used by the former UKTI. However there are a range of alternative definitions which may also be used. For example, the CBI defines MSBs as companies which have a turnover of £10m to £500m, while other definitions may place more emphasis on factors such as the number of staff employed.<sup>11</sup> These differences in the definition of MSBs (and the potential knock-on effect to the scope of the SME group) should be borne in mind when drawing comparisons with other data sources.

The proportion of the total population of businesses that is accounted for by businesses of different sizes is shown in Figure 3.1.

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<sup>9</sup> The Wave 2 interview was longer due to the inclusion of questions specifically relating to the *Exporting is GREAT* campaign. Full details of the questionnaires administered at each wave are included in Appendices B and C.

<sup>10</sup> Estimates of the proportion of companies falling into each category is based on population figures sourced from a Q1 2016 extract of the IDBR

<sup>11</sup> CBI report - Future Champions: Unlocking growth in the UK's medium-sized businesses  
[http://www.cbi.org.uk/cbi-prod/assets/File/pdf/future\\_champions\\_2011.pdf](http://www.cbi.org.uk/cbi-prod/assets/File/pdf/future_champions_2011.pdf)

**Figure 3.1: Number and proportion of companies of different sizes**

Company type/size	Proportion of all IDBR businesses
Less than £500k	80%
SME - £500k to £25m	19%
MSB - £25m to £500m	Less than 1%
£500m+	Less than 1%

Where relevant, other more specific sizes of company may also be the focus of commentary at points in this report.

### 3.4.3 Sample and weighting

The survey's sample was drawn from the IDBR (Inter-Departmental Business Register).

As the core target of the *Exporting is GREAT* campaign consisted of the £500k+ SME and MSB groups, they were oversampled relative to their true proportions in the population of businesses. This allows for more robust sub-group analysis amongst the £500k+ SMEs/MSB group, but also means that the effective base size when looking at findings amongst all businesses is reduced.

Quotas were applied to ensure that the required number of interviews with each size of company was achieved. However, prior to the application of quotas, a stratified random probability approach was used, with strata as shown in Figure 3.2.

**Figure 3.2: Sample stratification variables**

Variables used in the sample stratification	
Type/Size of Company	£500k+ SME – no employees
	£500k+ SME –1-4 employees
	£500k+ SME – 5-9 employees
	£500k+ SME – 10-49 employees
	£500k+ SME – 50-99 employees
	£500k+ SME – 100-249 employees
	MSB

	Other
<b>Industry Sector</b>	Manufacturing
	Infrastructure
	Distribution
	Financial Services
	Other
<b>Region</b>	England – North (GOR: North East, North West, Yorkshire & Humber)
	England – Midlands (GOR: East Midlands, West Midlands, East of England)
	England – South (GOR: South East, South West, London)
	Scotland
	Wales
	Northern Ireland

The unweighted sample sizes achieved in each wave are shown in Figure 3.3.

**Figure 3.3: Achieved sample by size of business**

	Wave 1	Wave 2
<b>Total sample size</b>	1405	1418
<b>£500k+ SMEs/MSBs</b>	1160	1139
<b>Other businesses</b>	245	279

Weights were applied to the survey data to ensure that they matched the profile of businesses on the IDBR in terms of:

- Company size (SME with 1-4 employees; SME with 5-9 employees; SME with 10-49 employees; SME with 50-99 employees; SME with 100-249 employees; MSB with 1 or more employees; and all other businesses on IDBR frame)
- Region (England North; England Midlands; England South; Scotland; Wales; Northern Ireland)



- Sector (manufacturing; infrastructure; distribution; financial services; and other)

Two separate sets of data were run, each weighted on the above factors. One of these was based on all businesses; the other on £500k+ SMEs/MSBs. The effective base sizes for each of these data sets are as per Figure 3.4.<sup>12</sup>

**Figure 3.4: Unweighted and effective base sizes by data set**

	Wave 1	Wave 2
All businesses – unweighted base	1405	1418
All businesses – effective base	347	405
£500k+ SMEs/MSBs – unweighted base	1160	1139
£500k+ SMEs/MSBs – effective base	922	909

All sub-group analysis in this report is based on the £500k+ SMEs/MSBs group – this is partly because this is the key target group for the *Exporting is GREAT* campaign and partly because the effective base size for the ‘all businesses’ group is not large enough to support robust sub-group analysis.

The effective base size for the ‘all businesses’ group is lower than that for the SMEs/MSB group because it was necessary to apply heavier weights to the ‘all businesses’ data. The total sample was designed to include a relatively limited number of small businesses with an annual turnover of less than £500k. However, this group accounts for a large proportion of all UK businesses. As such, any such businesses which were included in the *Exporting is GREAT* evaluation sample were given strong upweights in the ‘all businesses’ dataset, which reduced the effective base size significantly. The £500k+ SMEs/MSBs dataset excludes these smaller businesses and the weights applied to it are consequently less strong, hence the comparatively large effective base size.

#### 3.4.4 Statistical significance

Unless specified to the contrary, all commentary in this report focuses on differences (between waves or between sub-groups) that are statistically significant at a 95 per cent confidence level. In basic terms this means that if the survey were to be conducted 100 times, a finding of the same nature (e.g. sub-group A is more likely to respond in a certain way than sub-group B) would be found on at least 95 occasions.

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<sup>12</sup> The effective base size takes account of the reduction in statistical reliability associated with weighting data and is the value which is used in any significance testing conducted throughout this report.

## 3.5 Survey limitations

### 3.5.1 Lack of counterfactual

The main challenge faced by the *Exporting is GREAT* campaign evaluation is the lack of a counterfactual i.e. what would have happened to exporting attitudes and behaviours if the campaign had not been run.

As discussed in Section 3.3, the run-up to the EU referendum may have had an impact on businesses and this impact cannot be accurately quantified.

The survey has mitigated the lack of a counterfactual by asking respondents to directly specify whether the campaign had affected certain behaviours. However, it was not possible to obtain a reliable attribution of effect for the majority of survey metrics and it is therefore important to bear the broader background factors in mind when interpreting the findings.

### 3.5.2 Effective sample size

The other main limitation relates to the effective sample size when looking at all businesses. As the sample was designed primarily to give a robust read of the £500k+ SMEs/MSBs group, it was necessary to apply relatively large weights to the 'all businesses' data. These weights reduce the effective sample size for all businesses to a level where robust sub-group analysis is not possible (see Section 3.4.3). As such, all sub-group analysis in this report is based on £500k+ SMEs/MSBs.

### 3.5.3 Quota sampling

As outlined in Section 3.4.3, a quota sampling approach was adopted for the *Exporting is GREAT* campaign evaluation survey. This constitutes a less methodologically pure design than a random probability method. Strictly speaking confidence intervals cannot be applied to quota samples given that they do not use equal or known probabilities of selection. However, it is common practice to derive them and this is a pragmatic approach to provide some indication of the relative levels of variation to help users of the data understand that the percentages provided are statistics, not absolute numbers, and that all quoted percentages fall within a range.

The quota approach was adopted with a view to achieving the necessary number of interviews with key sub-groups in a cost effective manner. In spite of the use of quotas, the sample was drawn using a rigorous stratified approach (see Section 3.4.3) to ensure that it was representative and the achieved sample provides a good representation of the population of businesses.

## 4 Current and future exporting behaviours

This chapter examines the exporting status of UK businesses, looking at whether they are currently exporting and, if not, where they are in their exporting journey. It also examines changes in exporting behaviour over the course of the *Exporting is GREAT* campaign and highlights the issues which businesses perceive as inhibitors to exporting. Finally, it details the future plans of businesses in terms of engaging with overseas opportunities.

As discussed in Section 3.2, there are differences in the design and scope of the *Exporting is GREAT* campaign evaluation survey and the ABS, which means that the data from each are not directly comparable. The ONS ABS is used to monitor the percentage and number of exporters in GB.<sup>13</sup>

### 4.1 Current exporting behaviours

#### 4.1.1 Registered businesses' exporting experience and segments for growth

There are many ways in which it is possible to segment businesses when it comes to exporting attitudes and behaviours. This report focuses on the segments shown in Figure 4.1, which groups businesses according to where they currently sit on the pathway to exporting.

**Figure 4.1: Exporting segments**

#### **Sustain**

Sustain is made up of '**current exporters**' which have exported goods or services in the past 12 months.

#### **Reassure**

Reassure consists of businesses which **haven't exported in the past 12 months, but which had exported previously**.

#### **Promote**

Promote incorporates those businesses which **have never exported but which self-identify as having goods or services which could potentially be exported or developed for export**.

#### **Challenge**

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<sup>13</sup> <http://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey>

Challenge consists of companies which ***have never exported and do not currently see their goods or services as suitable for export.***

As shown in Figure 4.2, around one in seven businesses (15%) do not currently export, but say that their products or services could be exported or could be developed for export (the 'Promote' segment). When one considers that the population of UK Registered Businesses was 2,449,000 as of March 2015, this suggests that there are around 363,000<sup>14</sup> registered businesses in the UK that could potentially be exporters and which are already aware of this potential to some extent.

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<sup>14</sup> ONS Statistical Bulletin: UK Business: Activity, size and location: 2015

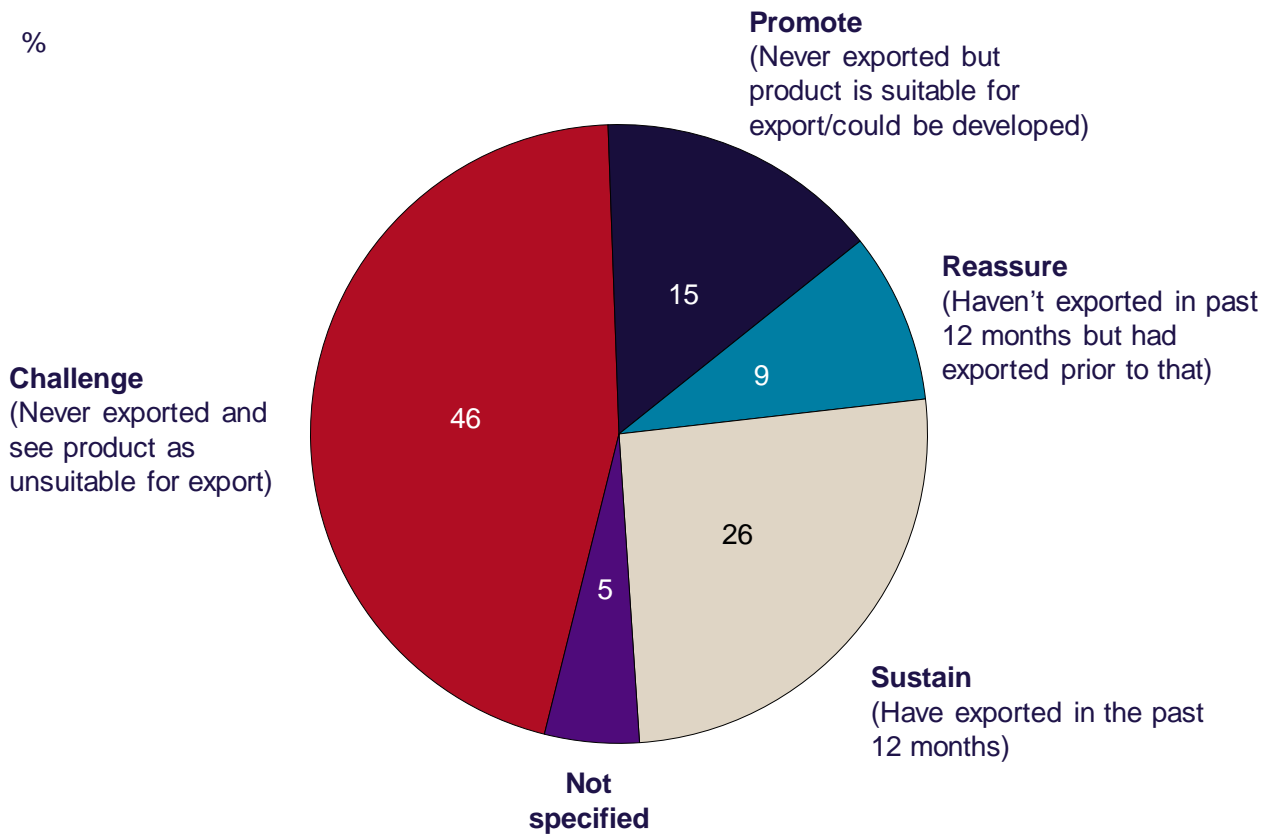
<http://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/ukbusinessactivitysizeandlocation/2015-10-06>

Taking into account the margin of error around these data at a 95% certainty level, the value may lie within around  $\pm 85,000$  of the 363,000 figure (i.e. between 278,000 and 448,000).

Please note that this number relates to businesses that say they have a product to export or which could be developed for export - it does not provide a view as to whether the business is 'export ready' or has the capacity to export on a sustainable basis. However, other studies have looked at this specific issue:

Mion and Novy estimate that between 4% and 11% of non-exporting SMEs could potentially export on a sustainable, continuous basis. The study is based on the 2012 Small Business Survey, which covers businesses with between one and 249 employees and includes non-registered SMEs. It reports that "potential exporters represent between 4 percent and 11 percent of all non-exporting firms. This corresponds to between 150,000 and 500,000 potential exporters among the SMEs in the UK...We find that between 25,000 and 150,000 of those firms could potentially export on a sustainable, continuous basis".

Mion, G and Novy, D (2013) "Gaining further understanding of the factors which influence export engagement among UK SMEs"

**Figure 4.2: Proportion of businesses at different stages of the exporting journey at Wave 2**

Source: Composite measure merging data from several variables  
Base : All respondents (1418)

As the base size for the Reassure segment is relatively low, the report focuses on Sustain or Reassure as a single entity (consisting of companies which currently export or have exported in the past). Nevertheless, where there are pronounced differences between these two segments, these are flagged in the commentary.

#### 4.1.2 Exporting status amongst different types of businesses

Figure 4.3 provides further detail about the proportion of businesses falling into each of the exporting segments described above. It examines how these proportions differ amongst the total business population compared to the £500k+ SMEs/MSBs that are the focus of the *Exporting is GREAT* campaign. It also summarises how these proportions have changed between Wave 1 and Wave 2.

At Wave 2, around one in seven (15%) of all businesses were in the Promote segment i.e. they had never exported but felt that their product (whether goods or services) was potentially suitable for export. The proportion falling into the Promote segment was very similar amongst the £500k+ SMEs/MSBs group at Wave 2 (12%).

Overall around a quarter of all businesses (26%) and a third of £500k+ SMEs/MSBs (33%) had exported goods or services in the past 12 months and therefore fell into the Sustain segment at Wave 2.<sup>15 16</sup>

Around one in ten (9%) of all businesses had not exported in the past 12 months but had done so at some point in the past and therefore fell into the Reassure segment at Wave 2. The same proportion was also found amongst £500k+ SMEs/MSBs.

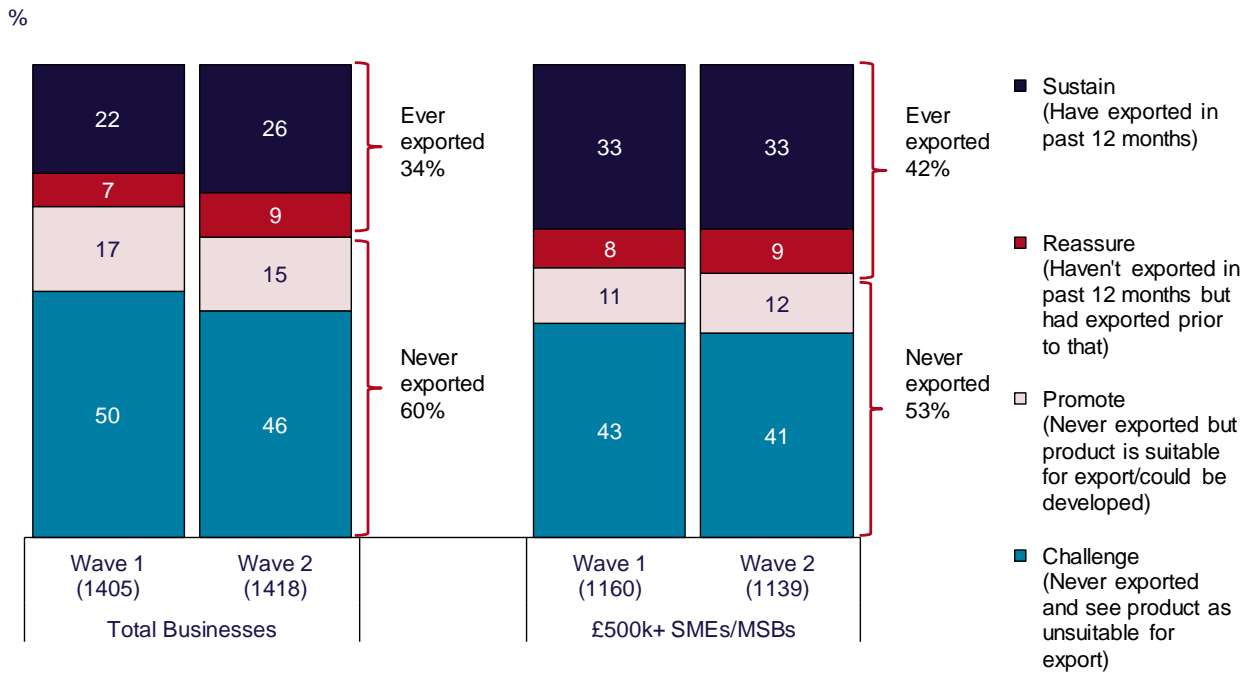
Finally, around half of all businesses (46%) and four in ten £500k+ SMEs/MSBs (41%) felt that their products were intrinsically unsuitable for export and therefore fall into the Challenge segment.

To date there have been no significant changes in exporting status between Waves 1 and 2 – this is perhaps to be expected bearing in mind the fact that interviewing in the two waves was conducted around six months apart and there will typically be lead times associated with the process of starting to export. As such, the *Exporting is GREAT* campaign would not realistically have had time to make a significant impact on exporting behaviours at this point. The stability of the results does, however, suggest that the immediate run-up to the referendum on leaving the EU had relatively little immediate effect on the proportion of companies exporting. The longer term impacts remain to be seen and will be monitored in future waves of this study.

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<sup>15</sup> The 2015 Longitudinal Small Business Survey found that 19% of all SME employers had exported in the past 12 months. The definition of SMEs in this study was 'businesses with between one and 249 employees'. As such, the figure is not directly equivalent to those quoted in this report, but is of a similar magnitude.

<sup>16</sup> As discussed in Section 3.2, figures quoted in DIT National Survey of Registered Businesses' Exporting Behaviours, Attitudes and Needs are not directly comparable to those from the ABS and caution should be exercised if cross-referencing these data sources.

**Figure 4.3: Exporting status by business type**


Source: Composite measure merging data from several variables

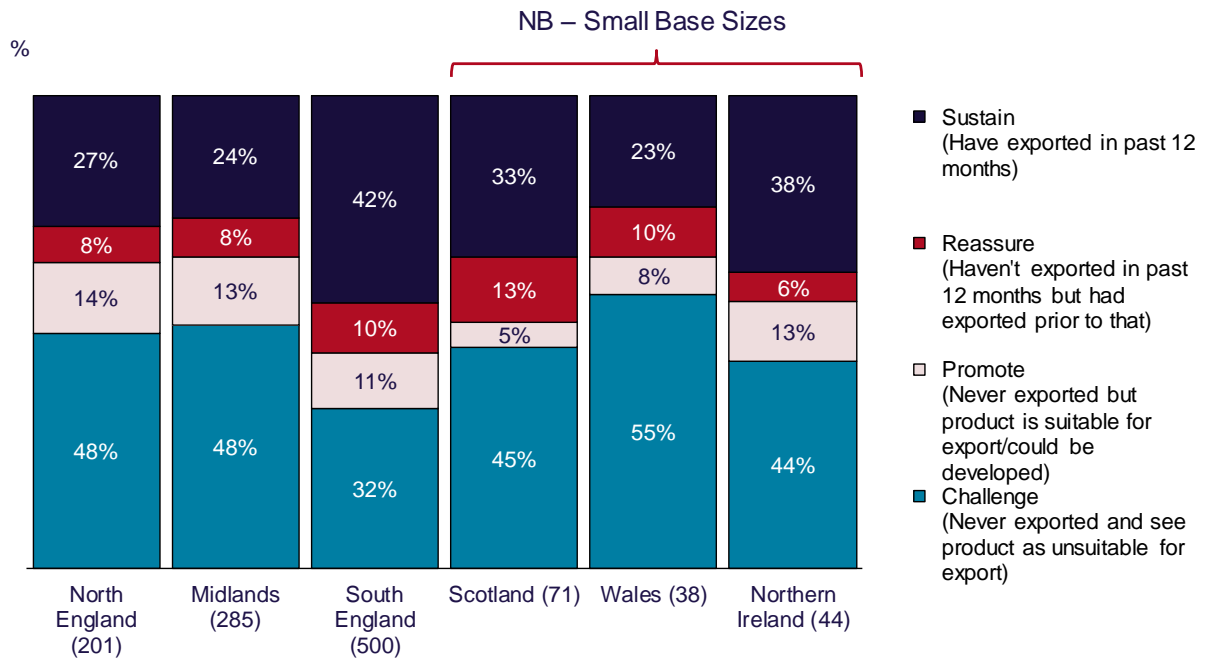
Base: All respondents

Approximately 5% of interviewed businesses answered "Don't Know". As such, the total falling into the exporting status categories does not add to 100%

### 4.1.3 Exporting status across the regions

While base sizes at a regional level are less robust (particularly in the case of the other home nations), it is striking to note the high proportion of £500k+ SMEs/MSBs in Southern England which fall into the Sustain segment at Wave 2 (42% compared to 27% in Northern England and 24% in the Midlands).

A relatively even proportion of companies in the English regions fell into the key Promote segment (14% in the North, 13% in the Midlands and 11% in the South). While base sizes are small, there were directional indications that it may be more challenging to boost exporting in the other home nations, with only 5% of Scottish companies and 8% of Welsh companies falling into the Promote segment.

**Figure 4.4: Exporting status of £500k+ SMEs/MSBs by region at Wave 2**


Source: Composite measure merging data from several variables

Base: All respondents

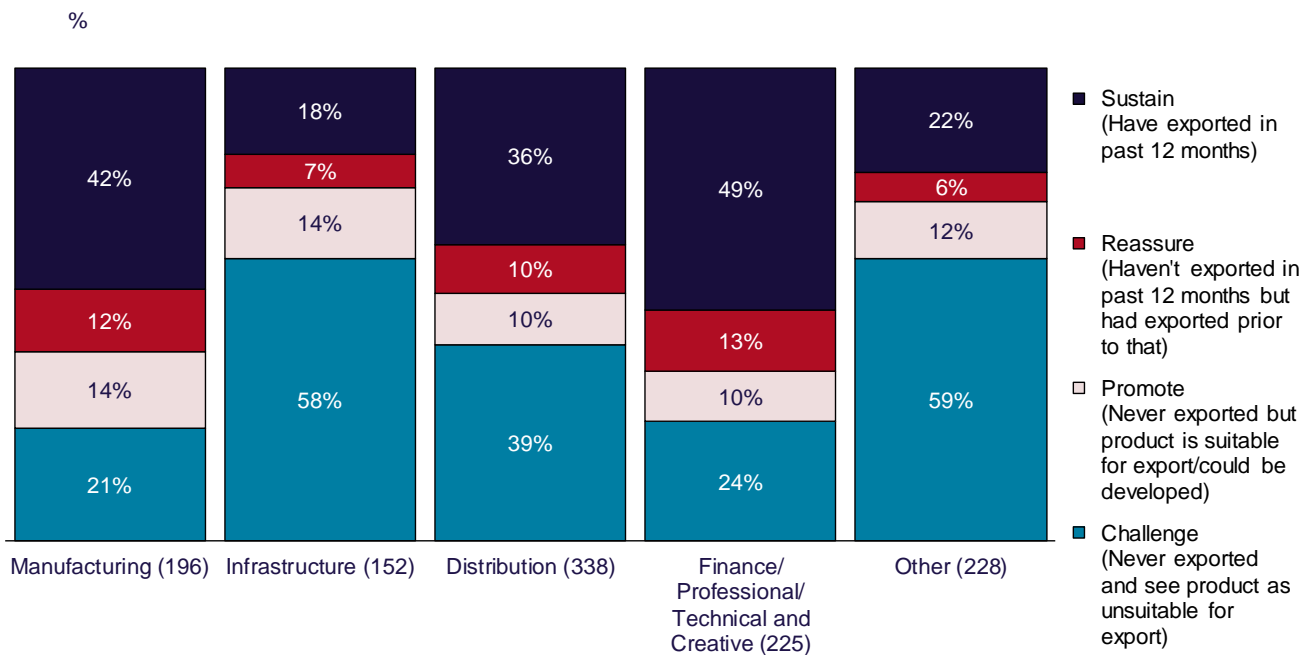
Approximately 5% of interviewed businesses answered "Don't Know". As such, the total falling into the exporting status categories does not add to 100%

#### 4.1.4 Exporting status of £500k+ SMEs/MSBs by industry sector at Wave 2

As shown in figure 4.5, firms in certain sectors were more likely to be in the Sustain segment – in particular, £500k+ SMEs/MSBs in the manufacturing (42%) and in the finance/professional/technical and creative (49%) sectors.

However, in spite of this disparity in current exporting levels, the proportion of companies falling into the Promote segment was similar for each of the broad sectors, ranging from 10% for firms in the distribution and finance/professional/technical and creative sectors, up to 14% for businesses in manufacturing and infrastructure.



**Figure 4.5: Exporting status by sector at Wave 2**


Source: Composite measure merging data from several variables

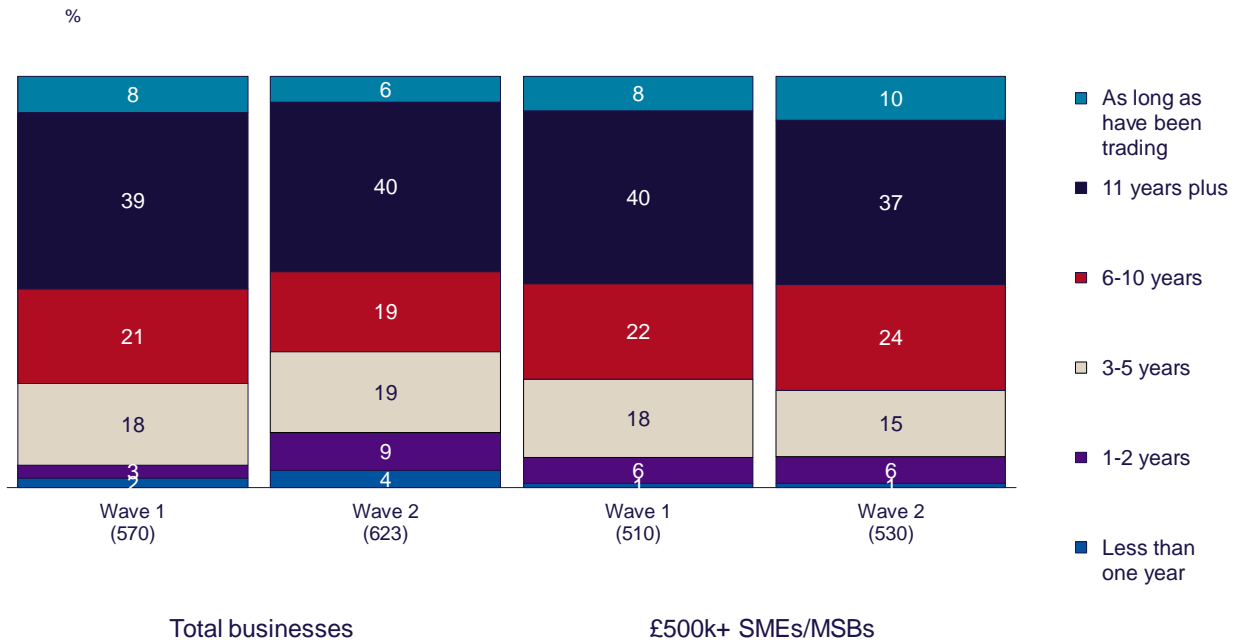
Base: All respondents

Approximately 5% of interviewed businesses answered "Don't Know". As such, the total falling into the exporting status categories does not add to 100%

## 4.2 Experience levels amongst exporters

All businesses which reported having exported (either currently or previously), were asked how long they had been exporting for. As shown in Figure 4.6, the majority of exporters were well established – this applied in both the total business population and amongst £500k+ SMEs/MSBs. At Wave 2, around six in ten exporters (59% amongst all businesses and 61% amongst the SMEs/MSBs) had been exporting for 6 years or longer. A further 10% gave a non-specific response that they had been exporting for as long as they had been trading, which is also likely to represent a well-established exporting history. Around four in ten had been exporting for 11 years or more (40% amongst all businesses and 37% amongst £500k+ SMEs/MSBs).

There were no significant changes in exporting experience levels between Waves 1 and 2.

**Figure 4.6: Number of years exporters have been exporting for**


Source : EXP\_YEARS – How many years has your business been selling goods and / or services licensing its products overseas?

Base : All who have exported

NB: Don't know not shown so does not always add to 100%

Exporters with a turnover of £25m to £500m (MSBs) were more likely than those with a lower turnover to have been exporting for 20 years or more (29% for MSBs compared to 15% for businesses with a turnover of £500k to £2m).

### 4.3 Exporting goods and services

As well as being asked in general terms about their exporting behaviours, businesses were asked about the nature of their exports in terms of whether they dealt in goods, services or both.

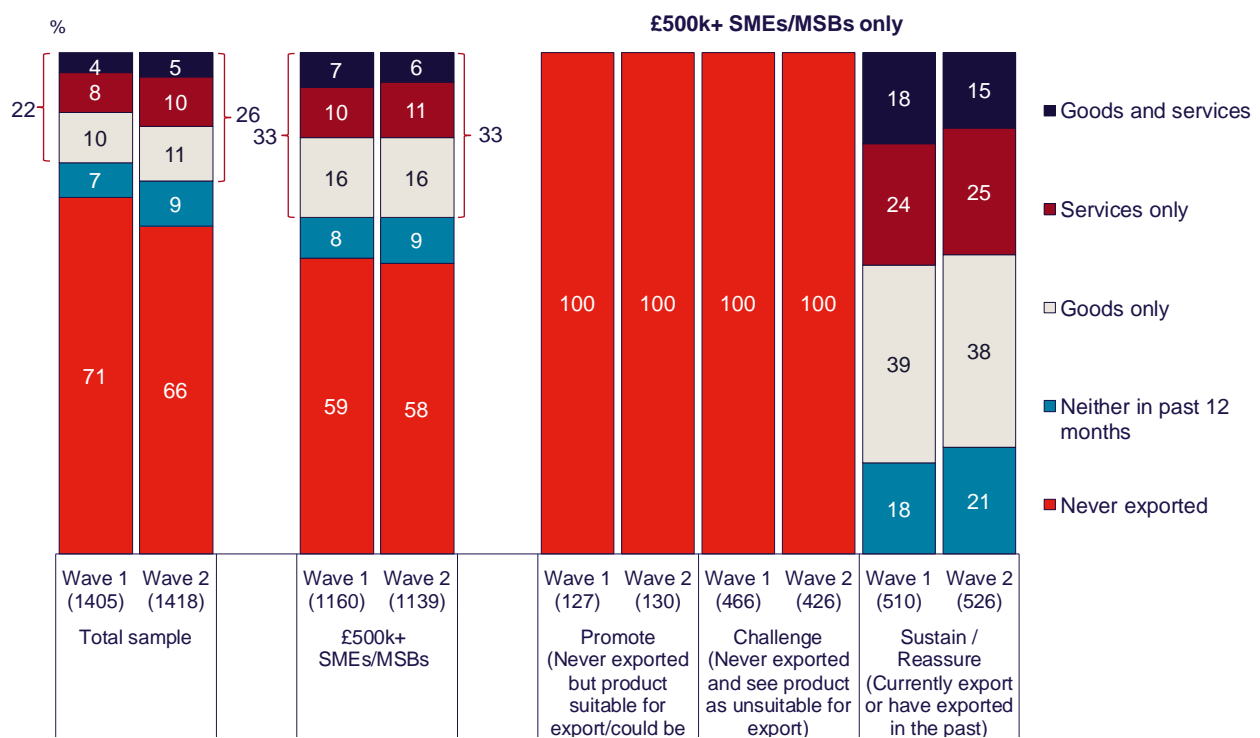
Amongst all businesses at Wave 2, there was an essentially equal division between those firms that exported goods only (11%) and those that exported services only (10%). A further 5% of all businesses exported *both* goods and services.

However, £500k+ SMEs/MSBs at Wave 2 were more likely to export goods only (16%) than to only export services (11%).

Focussing more specifically on the exporters and former exporters in the Sustain/Reassure segments, 38% of these had exported only goods in the past 12 months – a larger proportion than the 25% which had exported only services and the 15% that had exported both. A further one in five (21%) businesses in the Sustain/Reassure segments had not exported in the past 12 months.

There were no significant changes in this measure from Wave 1 to Wave 2.

**Figure 4.7: Whether businesses have exported goods or services in past 12 months**



Source : EXP\_SERV/EXP\_GOOD – In the past 12 months did your business export any SERVICES/GOODS outside of the UK? This could include commissions, royalties and licences.

Base : All respondents

Within the Sustain/Reassure segments, businesses with a high annual turnover were more likely than smaller businesses to export both goods and services. Around one in ten (10%) such businesses with a turnover of £500k to £2m exported both, compared to 19% amongst those with a turnover of £2m up to £25m and 20% of those with a turnover of £25m to £500m (MSBs).

Sustain/Reassure businesses in the South of England (33%) were more likely than those in the North (14%) and Midlands (11%) to export services only. Those in the Midlands were the most likely to focus only on the export of goods (49% compared to 34% in the South and 41% in the North).

#### 4.4 *Entrants to the exporting market*

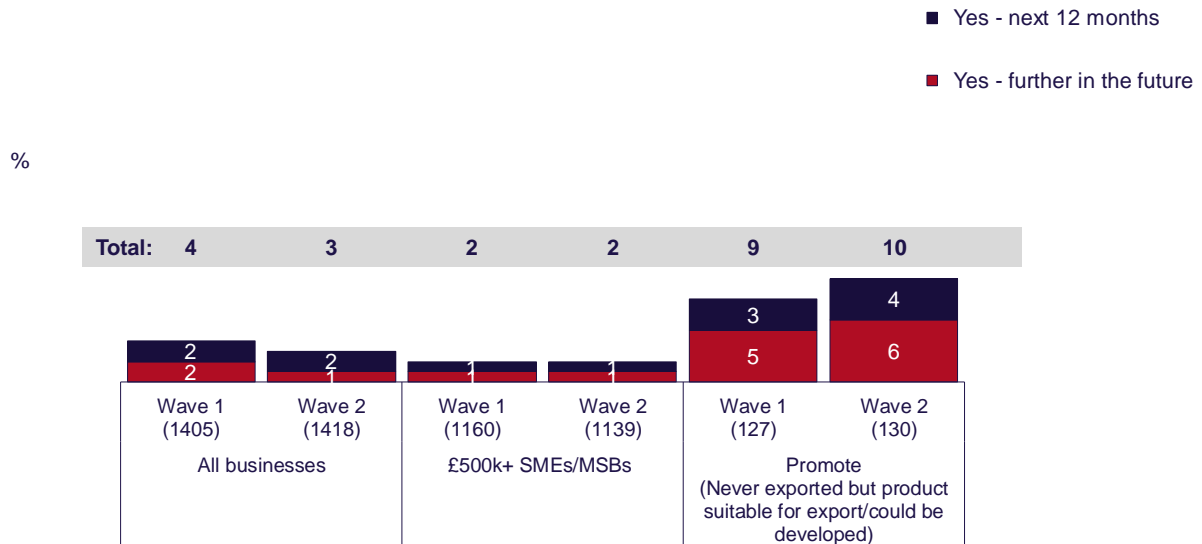
Amongst all businesses and amongst £500k+ SMEs/MSBs only 1% of firms had started to export since the start of the *Exporting is GREAT* campaign.

As highlighted in Section 4.1.2, there is typically a lead time for businesses which decide to move into the exporting market. As such, the *Exporting is GREAT* campaign will not realistically have had time to impact significantly on the number of new exporters and this will be a topic of greater importance in future waves of reporting.

#### 4.5 *Future plans for exporting*

Figure 4.8 shows the proportion of businesses with plans or an active interest in starting to export and the timeline for which they plan to do so.

Overall, the proportion of businesses falling into this category was small – only 3% of all businesses and 2% of £500k+ SMEs/MSBs had plans or an active interest in starting to export. However, amongst the *Exporting is GREAT* campaign's key target segment (Promote), the proportion was markedly higher – 10% of Promote businesses at Wave 2 were actively looking to export and 4% planned to do so within the next 12 months.

**Figure 4.8: Proportion of businesses with plans or an active interest in starting to export**


Source : EXPFUT - Do you have plans to start exporting or licensing your goods or services outside the UK? If yes: do you think this will be in the next 12 months or further in the future?

Base of EXPFUT : Respondents who have not exported but are interested. Rebased figures in chart above: All respondents

If the number of businesses which have started exporting since the start of the *Exporting is GREAT* campaign is added to the number which have plans to start, a total of 3% of £500k+ SMEs/MSBs and 4% of all businesses have either entered the exporting market since the campaign started or plan to do so.

#### 4.6 Potential policy and campaign implications

Companies which fall into each of the exporting segments are likely to require different types of support in order to continue or begin their exporting journey. This is outlined in more detail in Figure 4.9. Bearing in mind the range of perceived barriers to exporting described in Chapter 6, the provision of such support would appear to be vital in achieving the governments' aim to increase the number of exporters and the value of the goods which they export.

The importance of tailoring support when it comes to exporting is highlighted by the findings of a randomised controlled trial (RCT) which investigated the impact of a broadly targeted UKTI brochure

designed to provide information about exporting to businesses. The RCT found a surprising, asymmetric response on the part of exporters and non-exporters. Instead of revising their negative perceptions upward, non-exporters exposed to the brochure became more likely to report lower perceived benefits and higher perceived barriers compared to non-exporters who had not seen the brochure. In contrast, the attitudes of existing exporters improved.<sup>17</sup> As such, businesses should not be viewed as a single entity when it comes to providing information or support about exporting - different groups have different needs.

A communications approach which serves to reinforce views of current exporters (perhaps based on growth potential and aspiration) might not be the best message for non-exporters who have been shown to be dissuaded by a series of potentially compounding issues such as risk aversion, being happy just trading nationally, aversion to paperwork, previous bad export experiences and lack of knowledge. Such messaging may entrench non-exporters even further in their attitudes – as this group appear less likely to identify with highly aspirational messages which focus on rapid growth and are likely to need a more nurturing communication strategy. Undertaking in-depth research on the specific attitudes, behaviours, needs and barriers for each segment will be key to informing future decision making. This topic is discussed further in Chapter 6 while Figure 4.9 provides a more detailed summary of the definition of each of the segments and their underlying needs.

#### Figure 4.9: Exporting segments

##### Sustain

Sustain is made up of '**current exporters**' which have exported goods or services in the past 12 months.

A quarter of all businesses (26%) and a third of £500k+ SMEs/MSBs (33%) had exported goods or services in the past 12 months and therefore fell into the Sustain segment at Wave 2. As such, while moving businesses from the Promote segment to the Sustain segment will be vital if the number of exporters is to be increased, it is also important to minimise the number of current exporters which fall out of the Sustain segment. Maintaining a Sustain exporter is essentially as important as converting a Promote exporter.

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<sup>17</sup> Breilich, H et al (2016) "*Information, Perceptions and Exporting - Evidence from a Randomized Controlled Trial*"

<http://repository.essex.ac.uk/16005/>

## Reassure

Reassure consists of businesses which ***haven't exported in the past 12 months, but which had exported previously.***

This segment covers firms with a range of experiences – some may have faced genuine, seemingly intractable challenges when it came to exporting in the past; others may have been affected by temporary factors such as fluctuating exchange rates; and others may simply have refocused their business or temporarily lost an overseas contract. Research from the Federation of Small Businesses suggests that many lapsed exporters would be open to exporting again in the future.<sup>18</sup> The diversity of this segment means that there are challenges in communicating to them as a whole but reassurance is a fundamental element (e.g. messaging that the challenges of the past might not be such a major factor nowadays and that support is available / providing examples of businesses which succeeded at the second attempt).

## Promote

Promote incorporates those businesses which ***have never exported but which self-identify as having goods or services which could potentially be exported or developed for export.***

This segment is the key target for growing the exporting market and the focus of the *Exporting is GREAT* campaign. Businesses in this segment will need a blend of encouragement and practical support if they are to make the transition from having a general sense of their own exporting potential to actually starting to export.

## Challenge

Challenge consists of companies which ***have never exported and do not currently see their goods or services as suitable for export.***

Some of these businesses may genuinely be unable to export their products but in many cases the lack of belief in their ability to export may well be perceptual rather than absolutely reflective of their situation. As such, it is potentially valuable to make such businesses question their own assumptions. The journey to exporting for those in the Challenge segment is longer than that of other

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<sup>18</sup> Chung, C and McTague, M (2016) “*Destination Export – The Small Business Landscape*”

<http://www.fsb.org.uk/docs/default-source/Publications/reports/fsb-destination-export-report-2016.pdf?sfvrsn=0>

companies – effectively they need to be moved to the Promote segment (i.e. to realise the potential of their business where appropriate) and then receive the further inputs detailed above in order to complete their move into the export market.

The finding that there was a similar proportion of businesses in the Promote segment, regardless of their broad industry category, suggests that there is a broad base of potential new exporters and they are not bunkered in a single specific part of the economy. As such, it appears that campaign messaging should continue to highlight a wide range of companies.

In terms of businesses' current exporting plans, while it is positive that the Promote segment has a higher intention to export than the wider business population, it is highly unlikely that all of the 10% which currently plan/have an active interest in exporting will go on to do so. Further bursts of campaign activity will be a potentially valuable element in the drive to encourage them to start making steps towards exporting.



## 5 Underlying attitudes towards growth and exporting

This chapter looks at attitudes towards growth and innovation before moving on to discuss business perceptions of overseas demand and other broader issues related to exporting.

### 5.1 *Innovation and plans for growth*

Businesses were prompted with a number of attitudinal statements and asked which best reflected their thinking on growth (see Figure 5.1). At Wave 2 the majority of businesses said that they were aiming for steady sustainable growth rather than rapid growth (62% of all businesses and 72% of £500k+ SMEs/MSBs). The difference between £500k+ SMEs/MSBs and the total business population suggests that companies with an annual turnover of less than £500k are more likely than larger companies to be aiming to maintain their current business rather than to expand (as these smaller companies make up the majority of the business population which sits outside the £500k+ SMEs/MSBs group).

Relatively few businesses thought that to build a substantial business they had to go for rapid growth (7% of all businesses and 5% of £500k+ SMEs/MSBs).

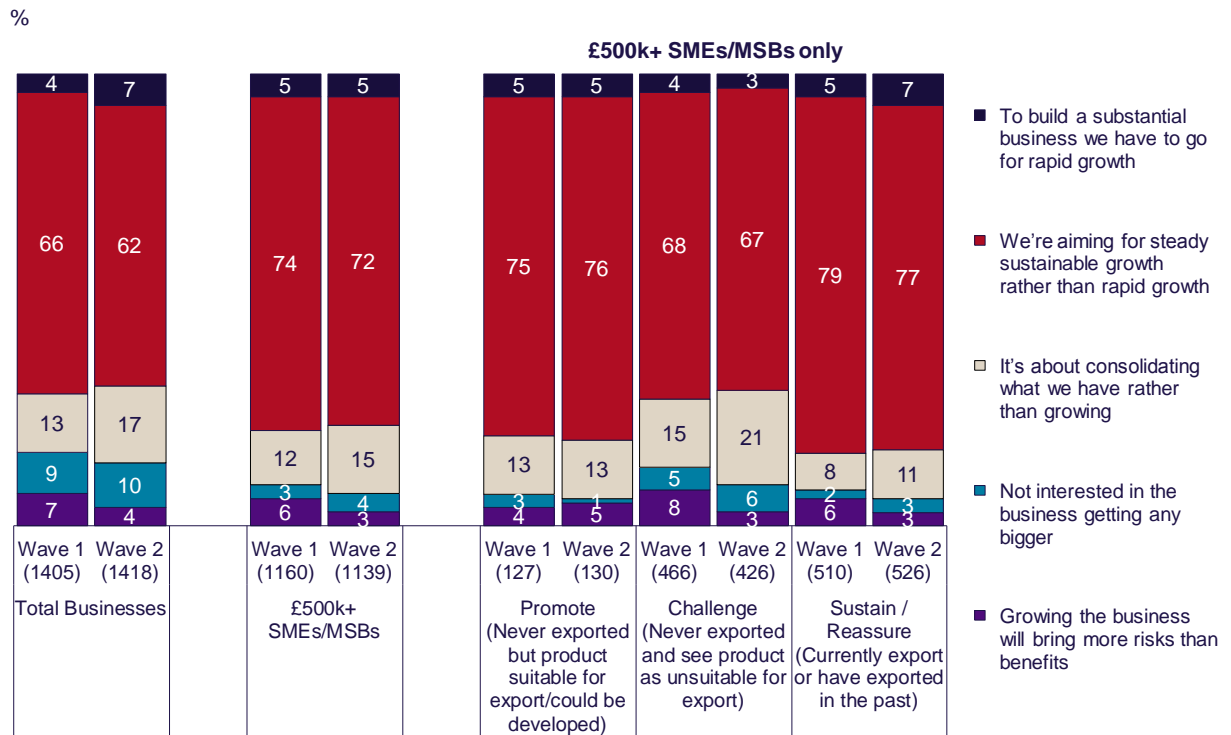
£500k+ SMEs/MSBs were more focused on growth than the overall population of businesses, with only 4% reporting that they were not interested in the business getting any bigger, compared to 10% in the wider business population.

Amongst the £500k+ SMEs/MSBs group, the proportion which felt that growing the business would bring more risks than benefits decreased from 6% at Wave 1 to 3% at Wave 2.

Businesses in the Promote and Sustain/Reassure segments were more growth focused than those in the Challenge segment. At Wave 2 around one in five businesses in the Challenge segment (21%) said their focus was on consolidating what they have rather than growing, an increase from 15% at Wave 1. However, there was also a decrease in the proportion of Challenge businesses which thought that growing the business would bring more risks than benefits (8% at Wave 1 vs. 3% at Wave 2).

More than eight in ten businesses in the Promote segment (81%) were aiming for either steady or rapid growth.

Attitudes to growth correlated with the annual turnover of businesses. 73% of businesses with a turnover of £500k - £2m were aiming for either steady or rapid growth compared to 84% of businesses with a turnover of £2m-£25m and 90% of businesses with a turnover of £25m to £500m (MSBs).

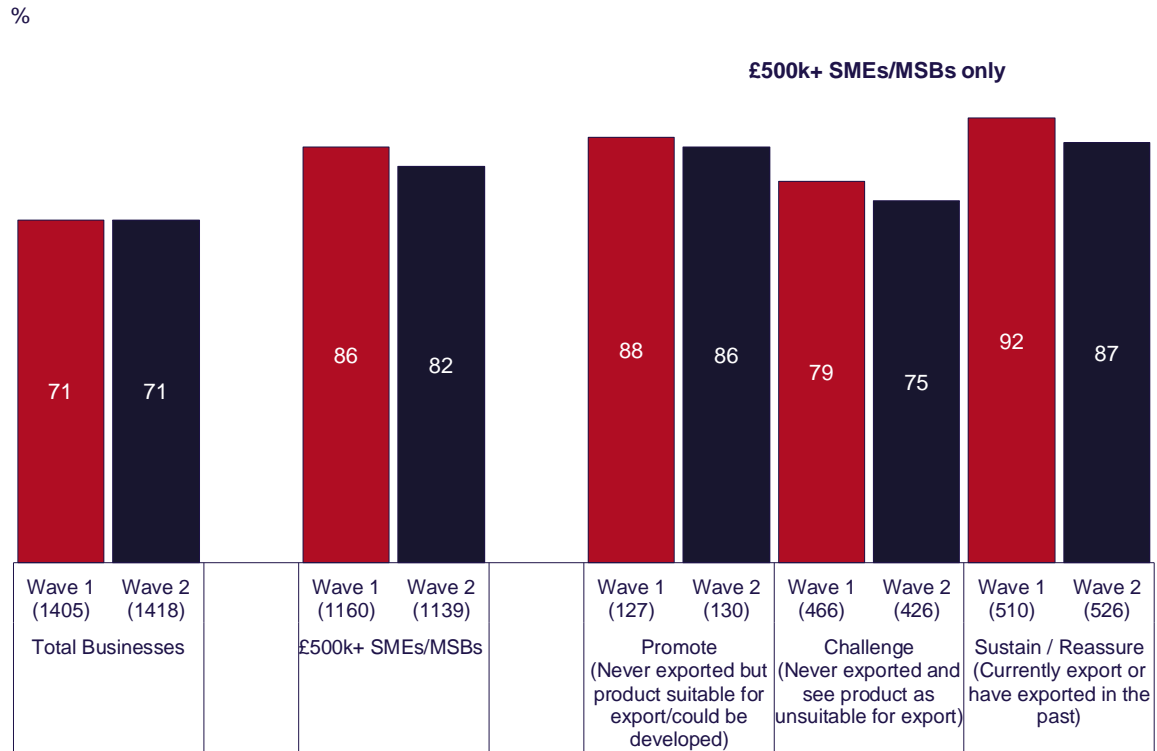
**Figure 5.1: Current thinking on growth**


Source : GROWATT – Which of these best describes your thinking on growth?

Base : All respondents

Businesses were also asked whether they aimed to grow in the next two to three years (see Figure 5.2). Unsurprisingly, the results to this question were largely reflective of those described in the preceding section. Around seven in ten (71%) of all businesses aimed to grow over this period, compared to 82% of £500k+ SMEs/MSBs.

Amongst £500k+ SMEs/MSBs there was a decrease in the proportion expecting to grow their business. This was driven by a decrease amongst the Sustain/Reassure segments from 92% to 87% between waves.

**Figure 5.2: Whether aim to grow business in next two to three years**


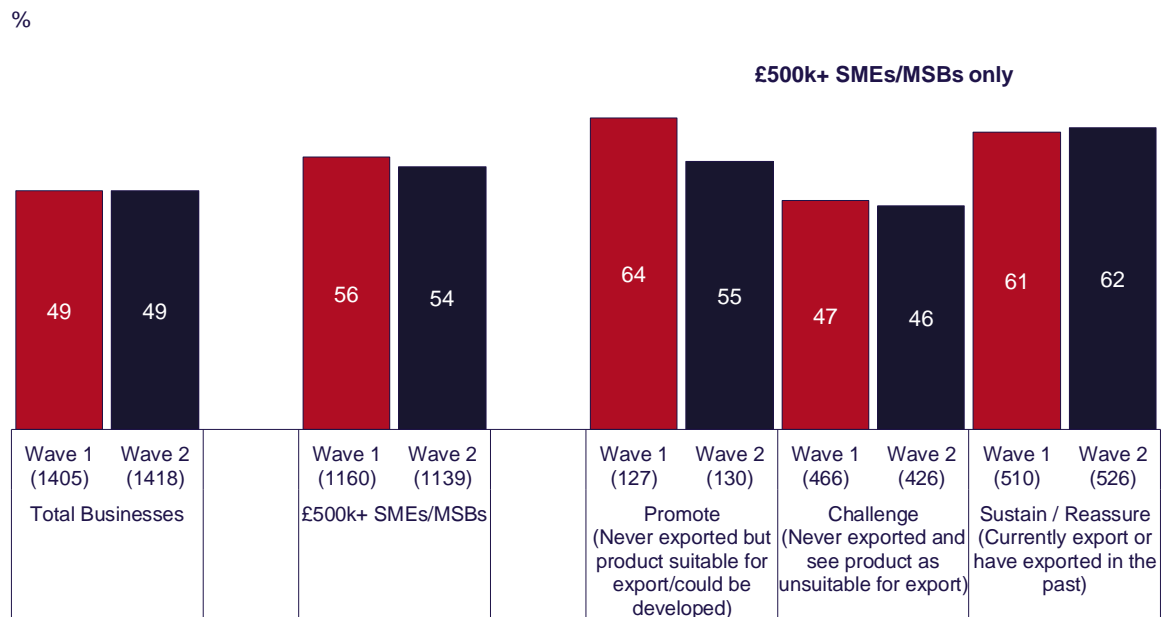
Source : PLAN\_GROW – Over the next two to three years, do you aim to grow your business?  
 Base : All respondents

In terms of innovation, around half of businesses had introduced new or significantly improved products in the past 12 months (49% amongst all businesses and 54% amongst £500k+ SMEs/MSBs). These data are shown in Figure 5.3.

At Wave 2 the Promote (55%) and Sustain/Reassure (62%) segments were more likely to have innovated in the past 12 months than those in the Challenge segment (46%).

Companies with a turnover of £2m-£25m were the most likely to report having innovated in the past 12 months (60% compared to 51% of companies with a turnover of £500k to £2m and 56% of companies with a turnover of £25m to £500m (MSBs)).

**Figure 5.3: Whether business has introduced new or significantly improved products in past 12 months**



Source : INNOV – Thinking about innovation within your business i.e. new products and processes, have you introduced new or significantly improved products or services in the past 12 months?

Base : All respondents

## 5.2 Attitudes towards exporting

### 5.2.1 Perceived demand

Businesses were asked about the extent to which they agreed or disagreed with two statements regarding their perception of potential demand for exports.

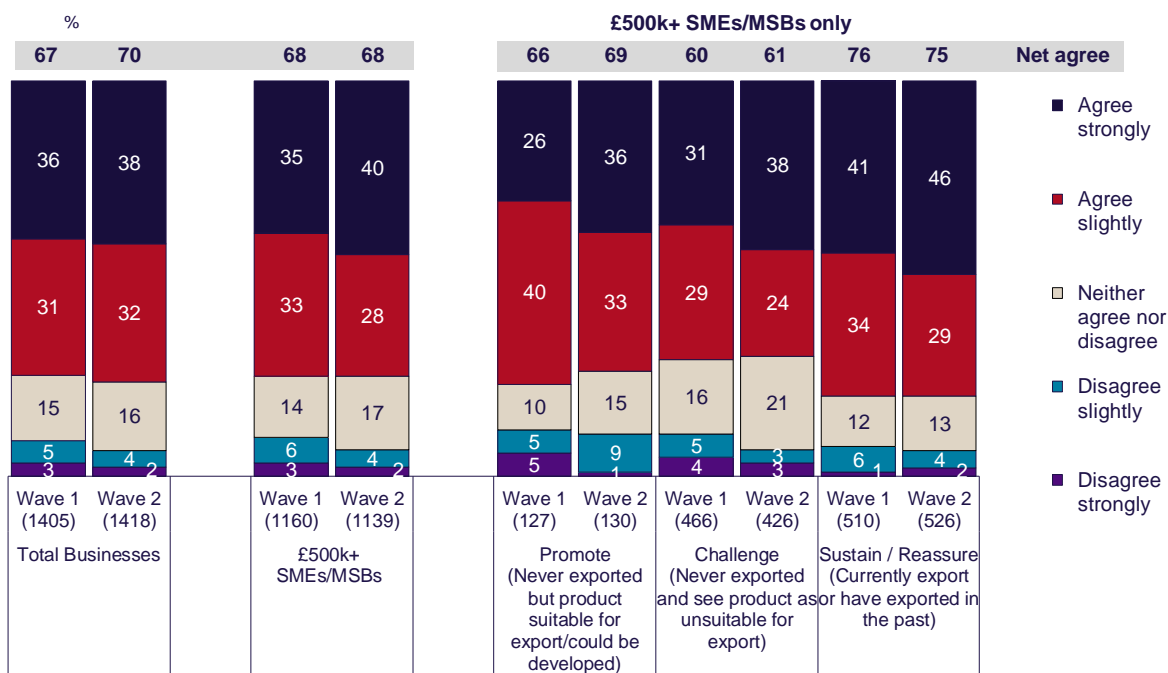
#### Perception that ‘there is a lot of demand for British products or services around the world’

As shown in Figure 5.4, the majority of businesses agreed (either strongly or slightly) that there is ‘a lot of demand for British products or services around the world’. At Wave 2, around seven in ten of all businesses (70%) and £500k+ SMEs/MSBs (68%) agreed with this statement.

Looking specifically at the exporting segments at Wave 2, those businesses in the Sustain/Reassure segments were more likely to agree that there is demand for British products or services (75%) than those in the Challenge (61%) segment.

Although there were no significant changes in the proportion of businesses in agreement (i.e. agreeing strongly or agreeing slightly) with this statement between Waves 1 and 2, there was a shift in the strength of agreement. At Wave 2, more businesses agreed **strongly** and fewer agreed **slightly** that there is demand for British products or services. This applied to £500k+ SMEs/MSBs (35% agreed strongly at Wave 1 compared to 40% at Wave 2) and to the Challenge segment (31% at Wave 1 vs. 38% at Wave 2).

**Figure 5.4: Agreement that there is a lot of demand for British products or services around the world (by business type and exporting segment)**



Source : EXPSTAT\_ALL – To what extent do you agree or disagree that...

Base : All respondents

NB: Don't know not shown so figures do not always add to 100%

In terms of other sub-groups of interest, £500k+ SMEs/MSBs which were aware of the *Exporting is GREAT* campaign were more likely to agree that there is a lot of demand for British products or services than those which had not seen the campaign (75% and 64% respectively).

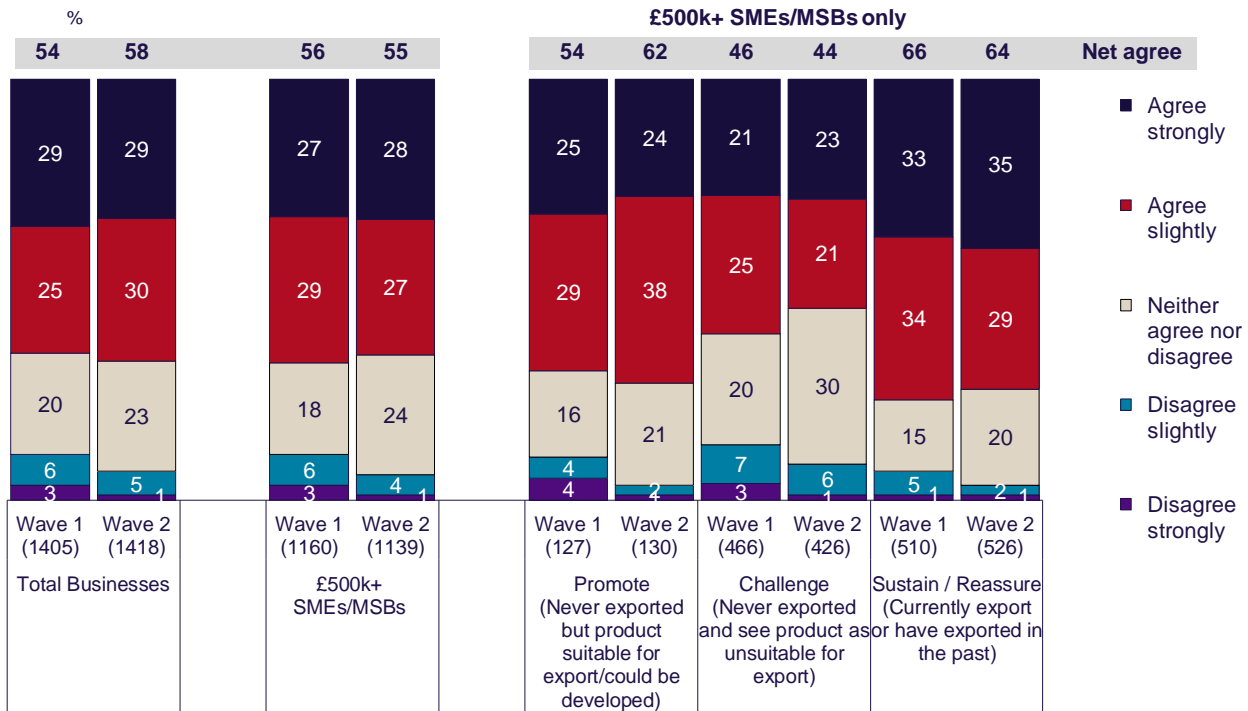
Companies with large turnovers generally had a more positive view of global demand for British products. 81% of companies with a turnover of £25m to £500m (MSBs) agreed with this statement to some extent, compared to 64% of companies with a turnover of £500k to £2m. This may be at least partly attributable to the fact that larger companies are more likely to be active exporters (and those who are already exporters are more likely to be positive about global demand, as discussed above).

Companies which had innovated in the past 12 months (see Section 5.1) were more likely to agree that there is overseas demand for British products than those which had not (72% and 63% respectively). There was a similar difference amongst those who planned to grow their business in the next two to three years and those who did not (70% and 60% respectively).

### **Perception that 'a lot more businesses *could* export than *do* export'**

As shown in Figure 5.5, a majority of companies also agreed that there was considerable scope for increasing exporting activity as 'a lot more businesses *could* export than *do* export'. Again, the level of agreement amongst the total business population at Wave 2 (58%) was broadly the same as that amongst £500k+ SMEs/MSBs (55%). Companies in the Challenge segment (which had never exported) were less likely to agree that this is the case (44%) than those in the Promote (62%) and Sustain/Reassure (64%) segments.

There were no significant changes in the levels of agreement (whether overall agreement, strong agreement or slight agreement) between Waves 1 and 2. However, amongst £500k+ SMEs/MSBs there was a decrease in the proportion of respondents disagreeing with this statement and an increase in the proportion giving a neutral response (18% said they neither agreed nor disagreed at Wave 1 vs. 24% at Wave 2). There was also an increase in the proportion of businesses that felt neutral in the Challenge segment (20% at Wave 1 vs. 30% at Wave 2).

**Figure 5.5: A lot more businesses *could* export than *do* export**


Source : EXPSTAT\_ALL – To what extent do you agree or disagree that...

Base : All respondents

NB: Don't know not shown so figures do not always add to 100%

At Wave 2, businesses with a high turnover were more likely to agree that more companies could export than do export – 69% of those with a turnover of £25m to £500m (MSBs) compared to 58% of those with a turnover of £2m to £25m, and 52% of those with a turnover of £500k to £2m.

Those businesses aware of the *Exporting is GREAT* campaign were more likely to agree with this statement than those who were not (65% and 50% respectively).

### 5.2.2 Broader views on exporting

Businesses for whom exporting was possible were asked a range of agree/disagree questions relating to various aspects of exporting. Figures C1 to C8 in Appendix C show the detailed responses to these questions, while Figure 5.6, below, summarises the proportion of all businesses which agreed (either strongly or slightly) with each statement. Figure 5.7 shows the equivalent data amongst £500k+ SMEs/MSBs, while Figure 5.8 focuses specifically on the Promote segment.

Amongst all businesses there were no statistically significant changes between Wave 1 and Wave 2, though the direction of travel appeared to be positive (with increases in nearly all measures relating to the positives of exporting and decreases in those relating to the downsides of exporting).

Exporting perceptions amongst all businesses were very similar to those amongst £500k+ SMEs/MSBs. As the same fundamental findings apply to both groups, any commentary on all businesses can be read across to the £500k+ SMEs/MSBs group as well.

At both waves, businesses were most likely to agree that 'being a successful exporter is something to be proud of' – around nine in ten of all businesses (89%) agreed that this was the case at Wave 2.

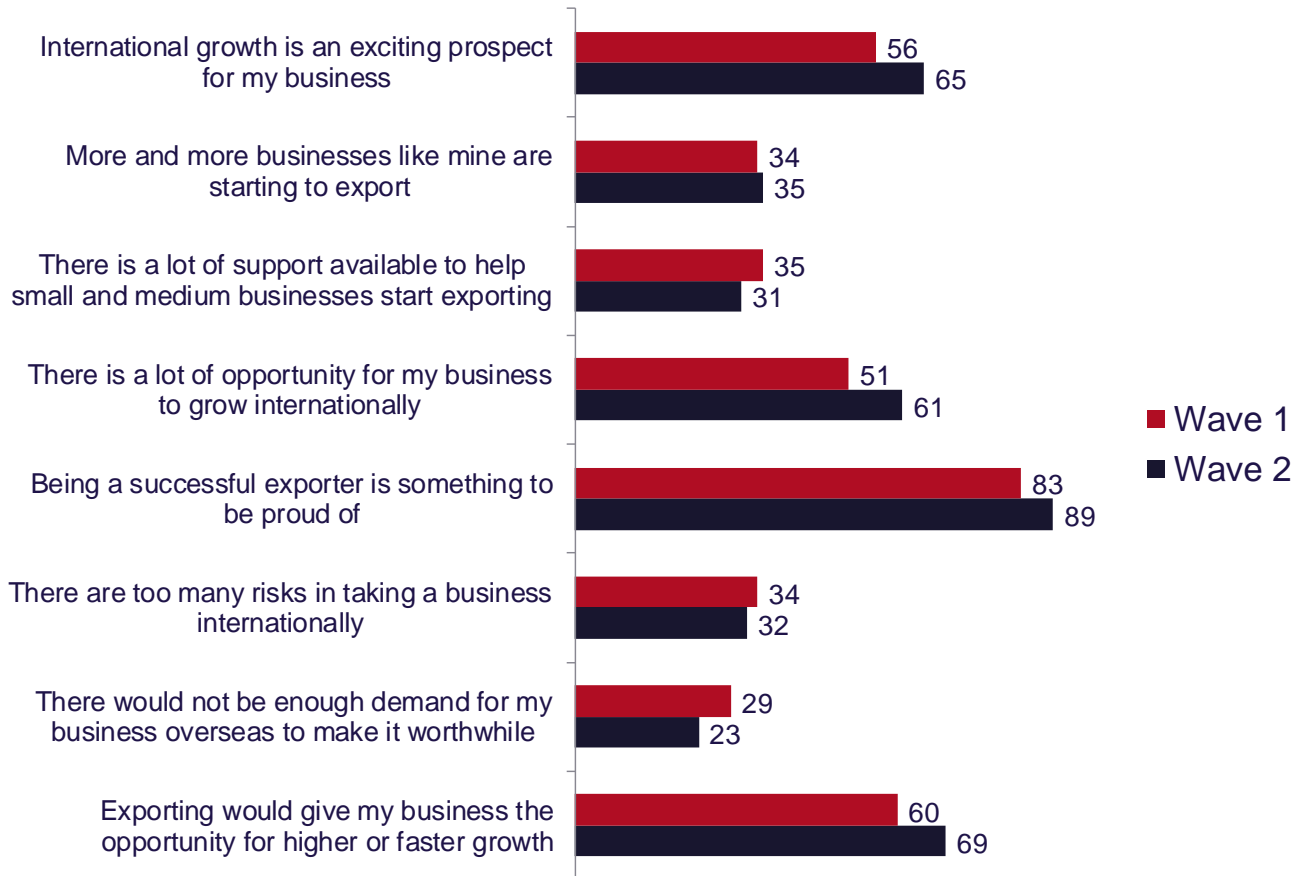
A majority of businesses felt that 'international growth is an exciting prospect for my business' (65%) and there was also widespread agreement that 'there is a lot of opportunity for my business to grow internationally' (61%) at Wave 2. However, as shown in Figure 5.8, there was less positivity in these measures amongst businesses in the Promote segment. Only 35% of Promote businesses agreed that international growth was an exciting prospect and 39% felt that there was a lot of opportunity for international growth.

At Wave 2 only around a third of all businesses (31%) and a quarter of businesses in the Promote segment (27%) agreed that there 'is a lot of support available to help small and medium businesses start exporting'.

There were no statistically significant changes between Wave 1 and Wave 2 amongst businesses in the Promote segment.



**Figure 5.6: Proportion of ALL businesses agreeing (either strongly or slightly) with statements about exporting**



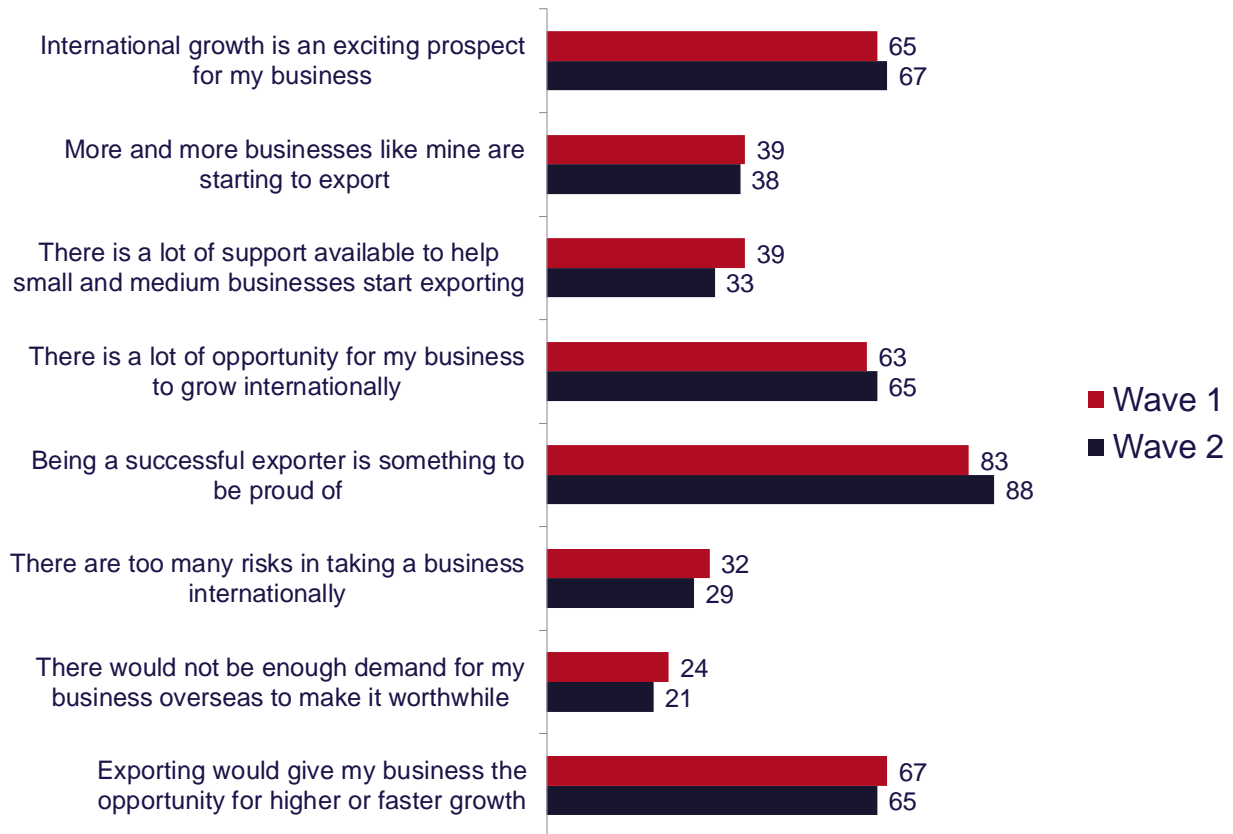
Source : EXPSTAT – To what extent do you agree or disagree that...

Base : All businesses for whom exporting is possible (Wave 1 = 749; Wave 2 = 800)

Amongst £500k+ SMEs/MSBs the proportion of businesses believing that 'there is a lot of support available to help small and medium businesses start exporting' actually declined from 39% at Wave 1 to 33% at Wave 2.

More positively, £500k+ SMEs/MSBs were more likely to appreciate the prestige of exporting at Wave 2, with 88% agreeing that 'being a successful exporter is something to be proud of'. This marked an increase from 83% at Wave 1.

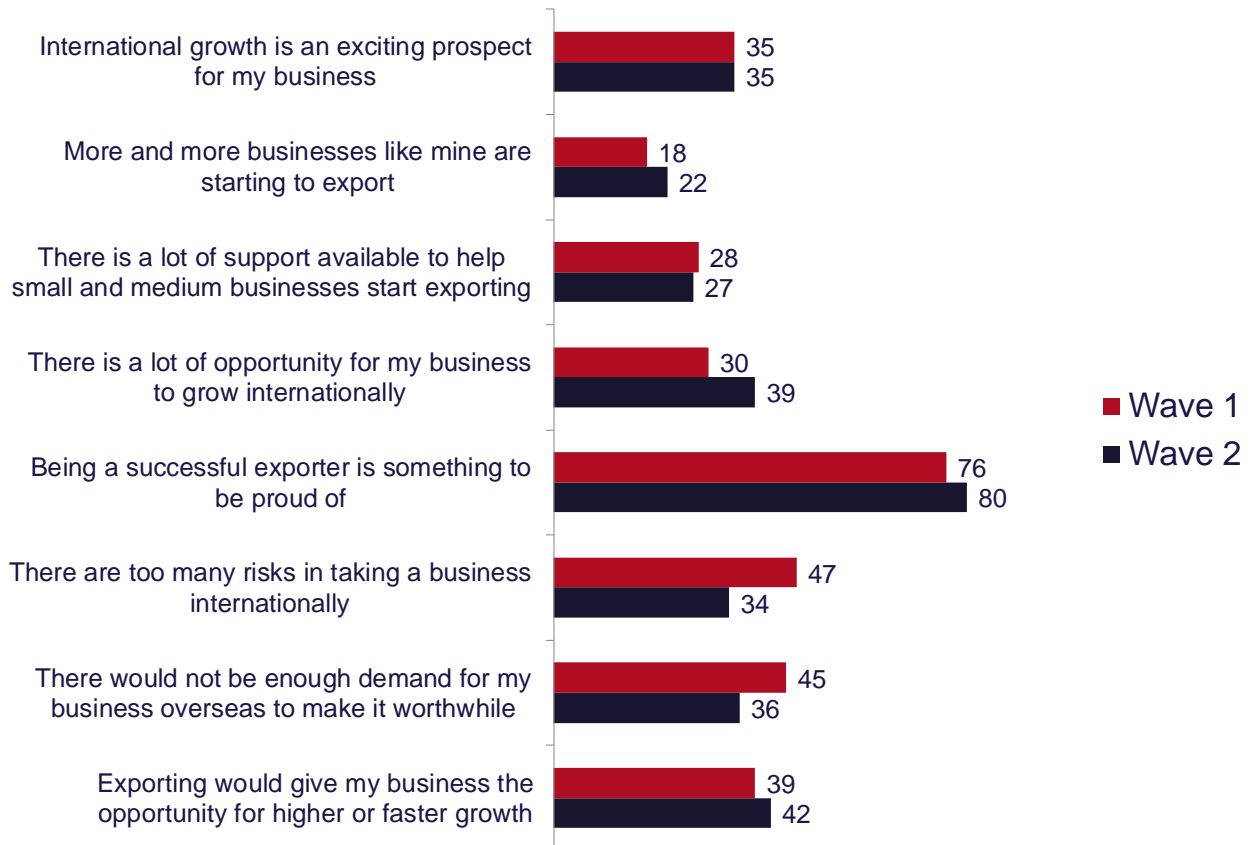
**Figure 5.7: Proportion of £500k+ SMEs/MSBs agreeing (either strongly or slightly) with statements about exporting**



Source : EXPSTAT – To what extent do you agree or disagree that...

Base : All £500k+ MSB/SMEs for whom exporting is possible (Wave 1 = 650; Wave 2 = 656)

**Figure 5.8: Proportion of businesses in the Promote segment agreeing (either strongly or slightly) with statements about exporting**



Source : EXPSTAT – To what extent do you agree or disagree that...

Base : All businesses in the Promote segment for whom exporting is possible (Wave 1 = 127; Wave 2 = 130)

### 5.3 Potential policy and campaign implications

The fact that eight in ten businesses in the Promote segment (81%) were aiming for either steady or rapid growth further supports the view that this segment should be targeted in any activities aimed to increase the number of exporters – messages which underline the growth opportunities associated with exporting are likely to be positively received by this segment. However, the tone of any such messages should avoid a focus on rapid change as this may actually be off-putting to businesses whose focus is very much on steady sustainable growth rather than rapid growth.

The finding that businesses in the Challenge segment (46%) were less likely to have innovated in the past 12 months than those in the Promote (55%) and Sustain/Reassure (62%) segments again suggests that the Challenge segment will be harder to convert to exporting than the Promote segment - they appear less open to innovation and, by implication, change. Nevertheless, it is encouraging that even amongst those companies which have not exported, the majority believe that there is a global appetite for British exports (61% of businesses in the Challenge segment).

The finding that £500k+ SMEs/MSBs which were aware of the *Exporting is GREAT* campaign were more likely to agree that there is a lot of demand for British products or services than those which had not seen the campaign (75% and 64% respectively) suggests that the campaign was successful in influencing perceptions. While the difference cannot be firmly attributed to the campaign, bearing in mind the key messages of the various advertisements it is likely to have played at least some role in this difference.

However, it appears that the campaign messaging relating to demand for British products or services may have been more successful in strengthening this perception amongst those who were already inclined to believe it, rather than in convincing those who did not previously believe there was demand. While the changes are essentially positive (as strong perceptions of demand would seem important in encouraging businesses to start exporting) further messaging on the topic may be necessary.

It is encouraging that companies which had innovated in the past 12 months were more likely to agree that there is overseas demand for British products than those which had not (72% and 63% respectively). This suggests that the most dynamic companies are also the most positive about potential demand for British exports. Previous research which identified a similar link between exporting and innovation also highlighted further benefits associated with exporting, including increases in productivity and resilience and the provision of a higher skilled and better paid workforce.<sup>19</sup>

There were, however, signs of challenges in terms of the Promote segment. Only 35% of Promote businesses at Wave 2 agreed that international growth was an exciting prospect (compared to 65% of all companies) and 39% felt that there was a lot of opportunity for international growth (compared to 61% of all companies). As this segment is a key target for growing the pool of exporters, improving their perceptions in this regard would seem to be a priority.

Furthermore, only around a third of all businesses (31%) and a quarter of businesses in the Promote segment (27%) agreed that there 'is a lot of support available to help small and medium businesses start exporting'. It is highly important that businesses feel supported – particularly bearing in mind the wide range of perceived barriers discussed in Chapter 6. As such, strong messaging on this topic

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<sup>19</sup> Harris, R and Li, Q (2007) "*Firm level empirical study of the contribution of exporting to UK productivity growth*"

(and ideally the provision of services that support their needs) would seem vital if the number of exporters is to be significantly increased.

## 6 Knowledge, information and support

This chapter examines the current knowledge level of UK businesses on the topic of exporting. It then goes on to discuss the perceived barriers to exporting that businesses have identified, though these may be an issue of perception rather than reflective of reality for those that have not exported yet. Finally, it looks at the types of advice and support that businesses currently use, the types they would find useful and their understanding of where to go for support.

### 6.1 Knowledge levels

Businesses which saw their goods or services as suitable for export were asked to self-assess their own levels of knowledge about various aspects of exporting on a 0 to 10 scale. In this section their responses have been grouped into three bands; a score of 8-10 has been classified as a 'high level of knowledge'; a score of 3-7 is classified as a 'moderate knowledge level' and a score of 0-2 represents 'poor or no knowledge'.

#### 6.1.1 Knowledge about how to export

At Wave 2 around half (49%) of all businesses had exported or felt that exporting was potentially possible. Of those, around a quarter reported having a high knowledge level about *how* to export (27%). Amongst £500k+ SMEs/MSBs which exported or felt that exporting was possible this proportion was 32%.

Reflecting their active experience of exporting, businesses in the Sustain/Reassure segment were much more likely to report high knowledge levels at Wave 2 than those in the Promote segment (43% and 7% respectively). It is, however, striking that half of businesses in the Sustain/Reassure segment (50%) only rated their knowledge of exporting within the 'moderate' range in spite of the fact they were current or lapsed exporters. To some extent this may be a reflection of the knowledge levels of the individual business decision maker that was interviewed in each company and may not be totally reflective of the institutional knowledge of exporting as a whole (for example an MD may substantially delegate responsibility for the handling of exports to specialised teams within the organisation).

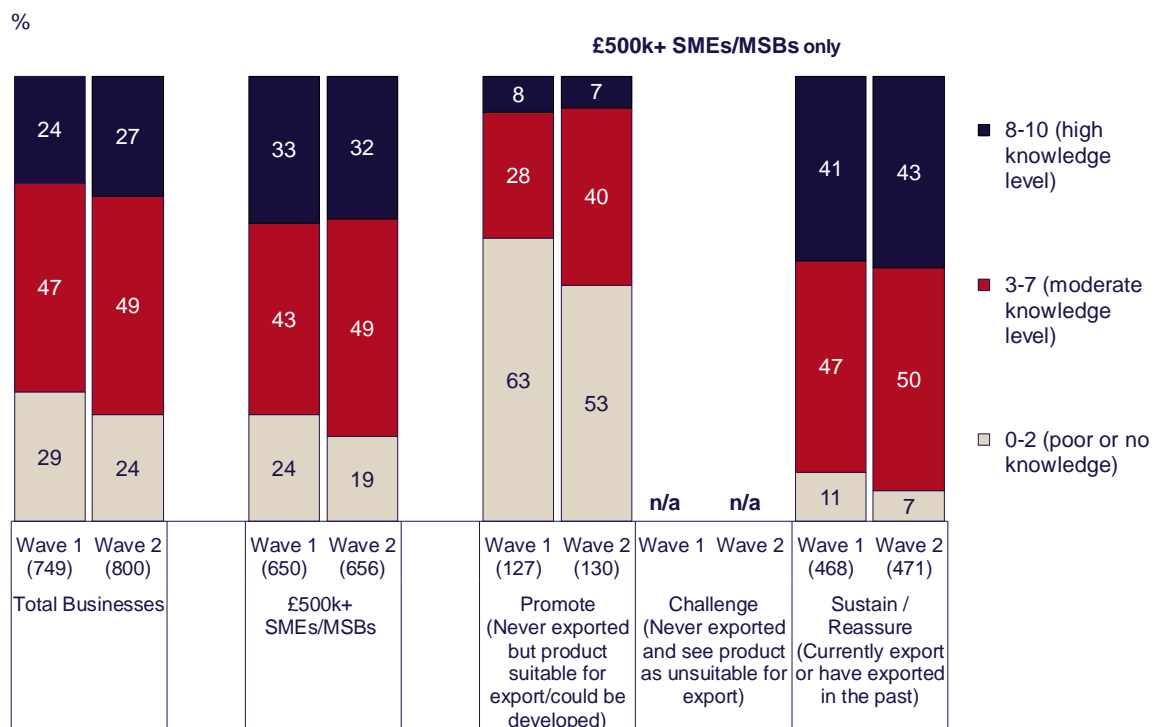
Between Waves 1 and 2, there was a significant increase in the proportion of businesses in the Promote segment which felt that they had a moderate level of knowledge about how to export (28% at Wave 1 compared to 40% at Wave 2). This was accompanied by a decline of a similar size in the proportion of such businesses with a low level of knowledge. However, the proportion of Promote companies with a high level of knowledge was only 7% at Wave 2 and did not increase between waves.

The proportion of businesses in the Sustain/Reassure segment also saw a smaller, but still significant, decline in the proportion feeling that they had poor or no knowledge of how to export (from 11% at Wave 1 to 7% at Wave 2).

Interestingly, there were relatively small differences in knowledge of how to export amongst companies in different turnover brackets (though 11% of companies with a turnover of £500k to £2m rated their knowledge as zero, which was significantly higher than the proportion found in larger companies).

Overall, those who were aware of the *Exporting is GREAT* campaign were more likely to have a high knowledge level than those who were unaware (39% and 26% respectively).

**Figure 6.1: How would you describe your current knowledge about how to export**



Source : EXP\_KNOW On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe...

Base : Responds who export or for whom exporting is possible

### 6.1.2 Knowledge about where to go for information about exporting

A similar overall pattern was seen in terms of knowledge about where to go for information about exporting – at Wave 2, 30% of all companies for whom exporting was seen as possible reported a high level of knowledge in this respect. Again, the proportion with high knowledge levels was greater amongst companies in the Sustain/Reassure segment (37%) than amongst those in the Promote segment (16%). Nevertheless, it is striking that even amongst the exporters/former exporters in the

Sustain/Reassure segment, almost two thirds (63%) had moderate to low levels of knowledge about exporting information sources.

Between Waves 1 and 2 there was an increase in the proportion of £500k+ SMEs/MSBs businesses with a moderate level of knowledge (from 41% to 49%).

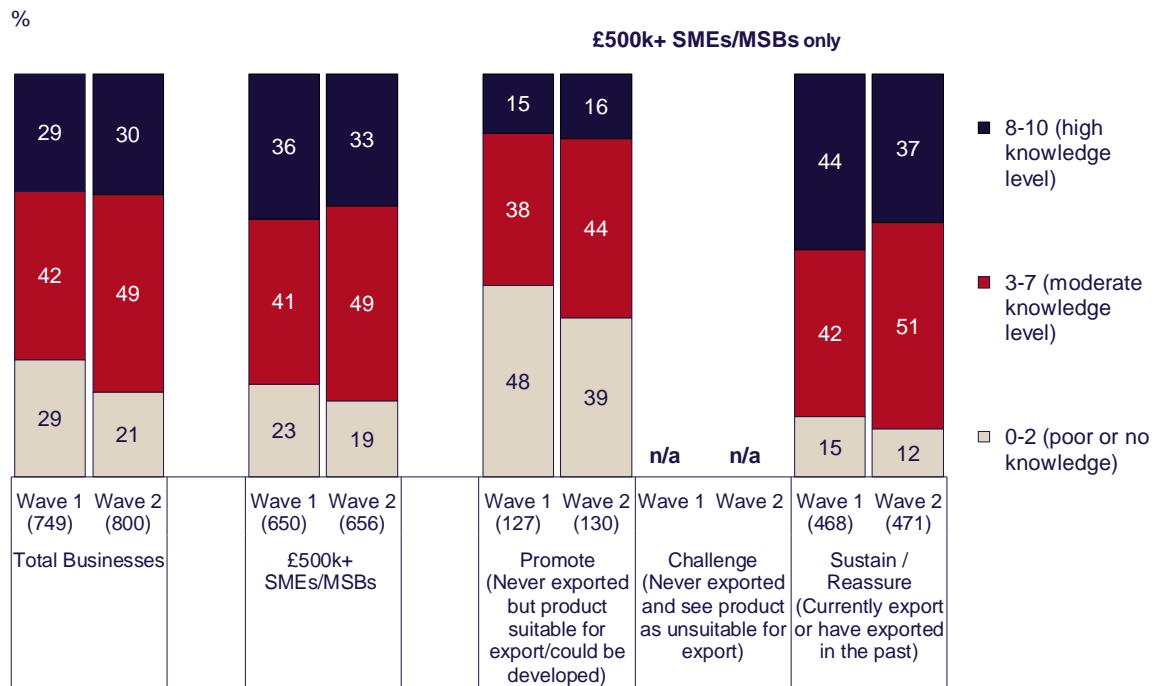
While there were directional improvements in knowledge of where to go for information about exporting amongst companies in the Promote segment, these were not statistically significant and should be viewed with according caution.

Companies in the Sustain/Reassure segment actually saw a decrease in knowledge levels about where to go for information between Waves 1 and 2 – the proportion with a high level of knowledge fell from 44% to 37%.

Those who were aware of the *Exporting is GREAT* campaign were more likely to have a high level of knowledge about where to go for exporting than those who were unaware (40% and 26% respectively). This may be attributable in part to the campaign messaging, but is likely to also be a function of those noticing the campaign being fundamentally more interested in exporting.



**Figure 6.2: How would you describe your current knowledge of where to go for information about exporting**



Source : EXP\_KNOW On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe...

Base : Responds who export or for whom exporting is possible

### 6.1.3 Knowledge about where to go for help and support with exporting

Knowledge levels about where to go for *help and support* with exporting were similar to those for knowledge of where to go for *information* about exporting (see Figure 6.3).

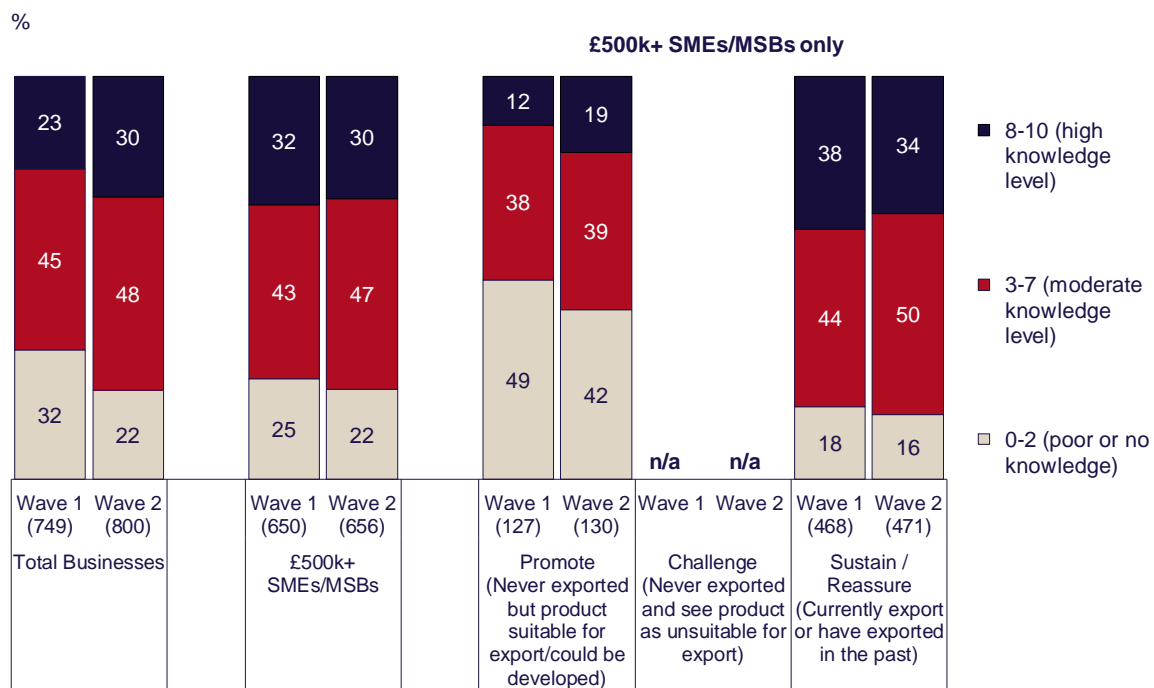
At Wave 2, around a third of all companies (30%) and £500k+ SMEs/MSBs (30%) for whom exporting was seen as possible had a high level of knowledge in this respect.

The proportion of all businesses for whom exporting was seen as possible which had a poor level of knowledge decreased from 32% at Wave 1 to 22% at Wave 2.

There were no significant changes in the Promote segment between Waves 1 and 2, though the direction of travel appears positive. However, at Wave 2 only around two in ten Promote companies felt that they had a high level of knowledge about where to go for help (19%).

Those who were aware of the *Exporting is GREAT* campaign were again better informed than those who were unaware of it (38% of those aware reported a high level of knowledge in this regard, compared to 24% of those unaware of the campaign). Again, this may be attributable in part to the campaign messaging, but is likely to also be a function of those noticing the campaign being fundamentally more interested in exporting.

**Figure 6.3: How would you describe your current knowledge of where to go for help and support with exporting**



Source : EXP\_KNOW On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe...

Base : Responds who export or for whom exporting is possible

## 6.2 Perceived barriers to exporting

The survey asked two separate questions relating to perceived barriers to exporting. Businesses which felt that their offer was unsuitable for exporting were asked why this was the case. Separately, businesses which exported already, or which felt their offer could be exported, were asked what they saw as the barriers to exporting or what barriers they had overcome in order to start exporting. Each of these is discussed in turn below.

### **6.2.1 Perceived barriers to exporting amongst those who believe their offer is unsuitable for export**

As shown in Figure 6.4, at Wave 2 the perceived barriers to exporting amongst those believing their goods or services were unsuitable focused strongly on two elements; the perception that their business was only 'local'; and the perception that their product or service was not transportable.<sup>20</sup>

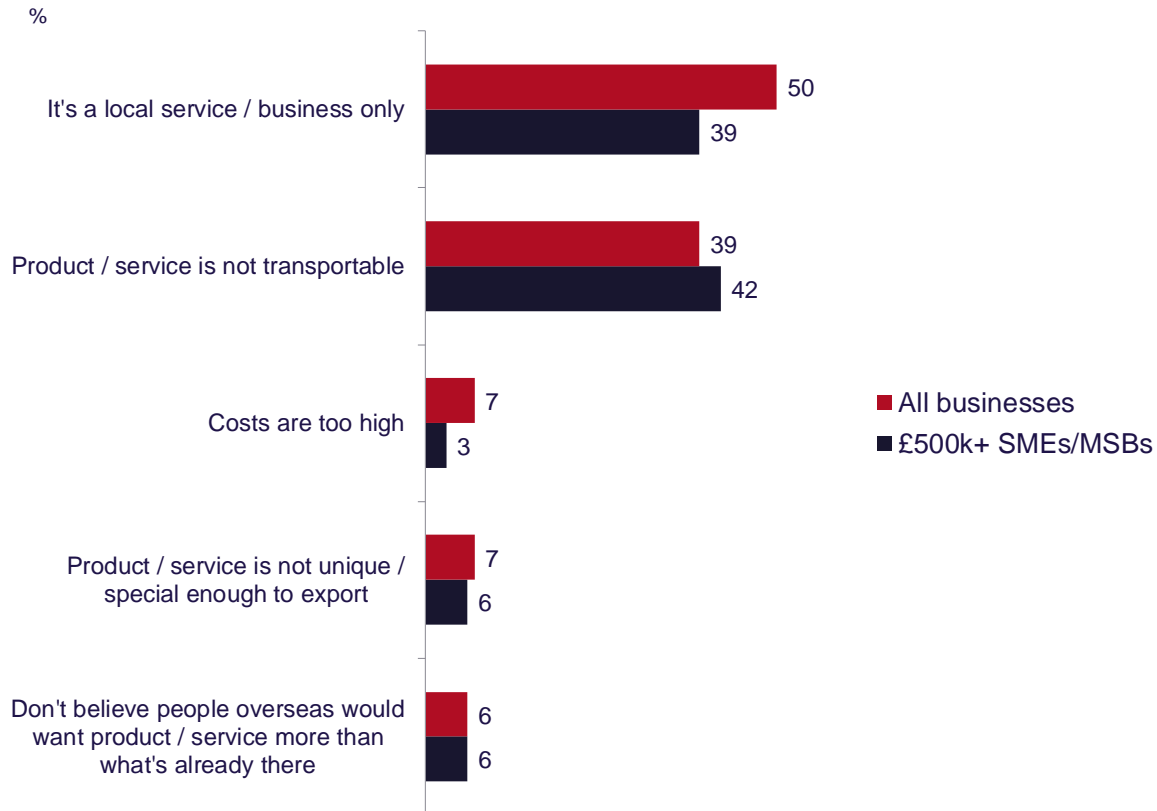
Concerns around costs were more widespread amongst all businesses (7%) than amongst £500k+ SMEs/MSBs (3%), perhaps reflecting the large number of small businesses in the total business population. Nevertheless, this was very much a secondary concern compared to the factors mentioned above.

The other main perceived barriers were that the product or service being offered was not special or unique enough to export (7% of all businesses) and a sense that people in other markets would prefer the goods or services that are already available to them (6% of all businesses).

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<sup>20</sup> This was asked as a spontaneous question (i.e. respondents were not prompted with a list of possible answers).

**Figure 6.4: Perceived barriers to exporting amongst those believing their offer is unsuitable for export (responses mentioned by 5%+ of businesses at Wave 2)**



Source : EXP\_UNSUIT – Why do you say your product or service is not suitable for export?

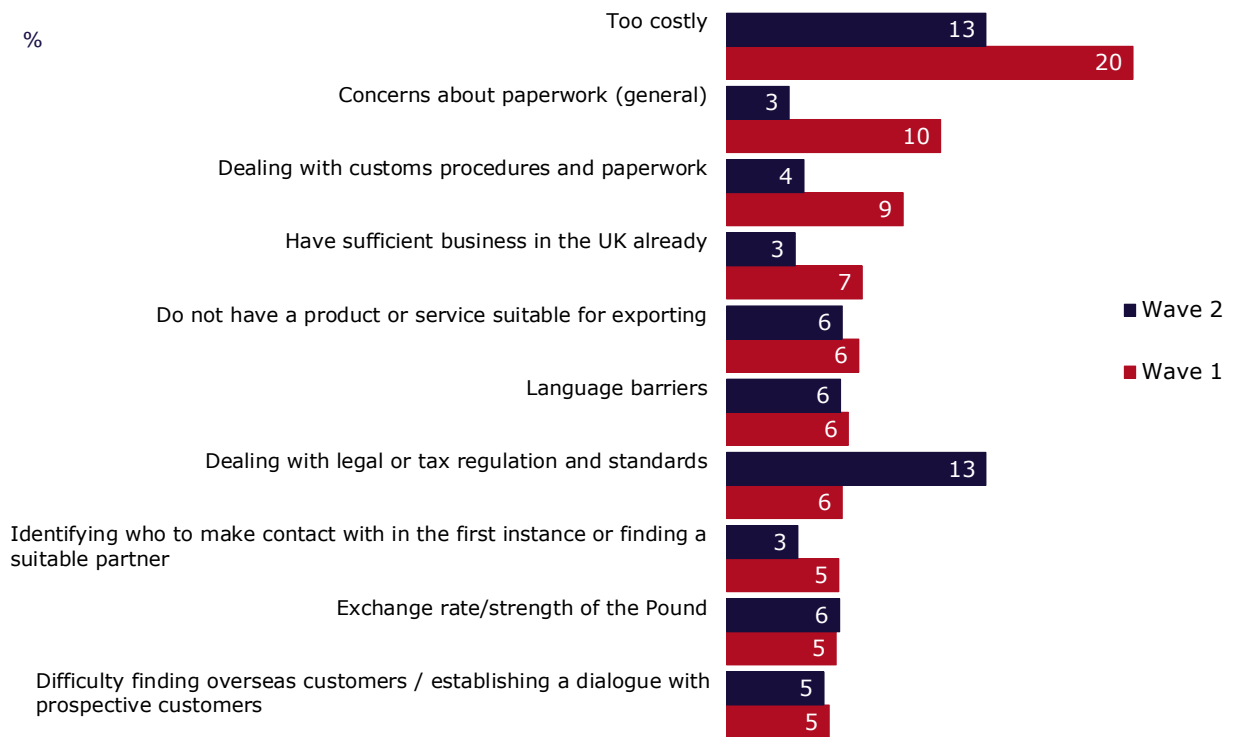
Base : All who believe their product is unsuitable for export - Wave 2: All businesses (618); £500k+ SMEs/MSBs (483)

### 6.2.2 Perceived barriers amongst those who do export or believe their offer could be exported

This section examines the perceived barriers amongst those who currently export their goods or services, or who believe their goods or services are potentially suitable for export. The question was again asked without prompting respondents with answers – as such the responses effectively show the top of mind issues for businesses. As shown in Figure 6.5, amongst all businesses the primary concerns at Wave 2 were that it would be too costly (13%) or that it would be challenging to deal with legal or tax regulations and standards (13%).

While the concerns about legal or tax regulations increased significantly from Wave 1, when only 6% of businesses mentioned this as a concern, this was offset by the proportion giving the more general response that they were concerned about 'paperwork' (which fell from 10% to 3%) – the two factors overlap to some extent.

**Figure 6.5: Perceived barriers to exporting amongst all businesses which could potentially export or which already do (responses mentioned by 5%+)**

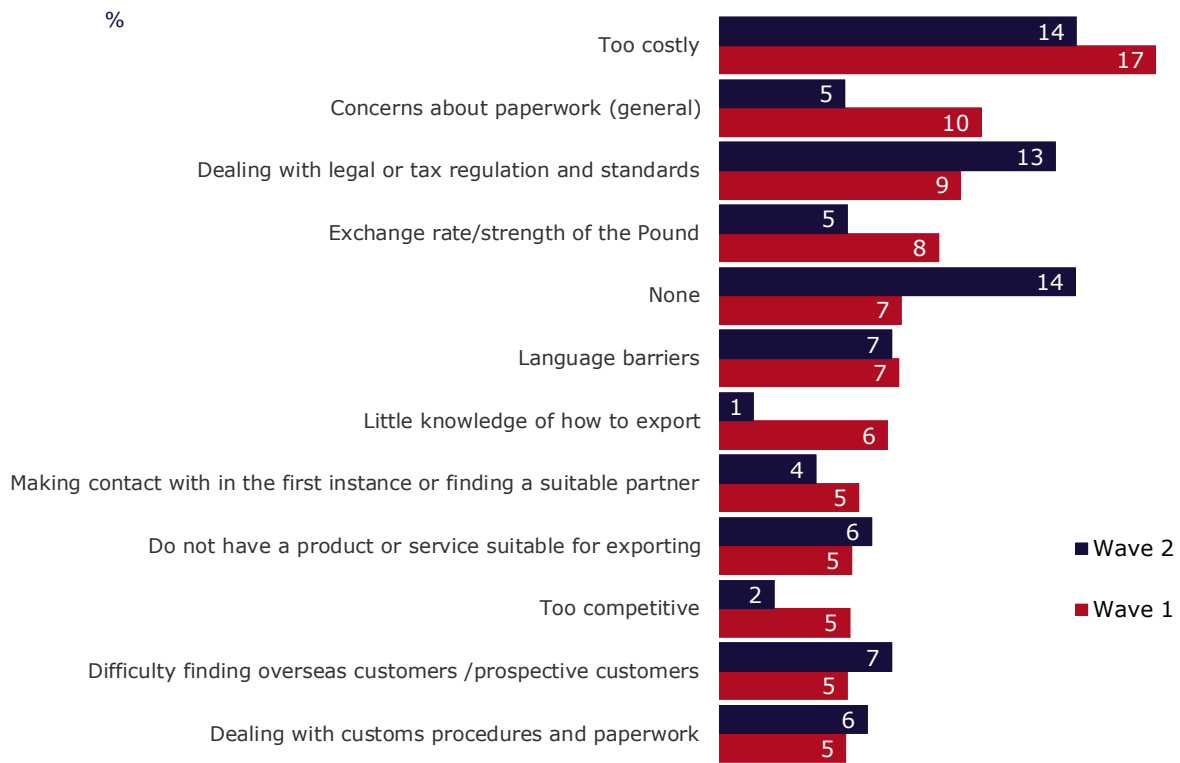


Source: EXPN - What are the barriers that prevent your business exporting or if already exporting, what have been the key barriers you had to overcome?

Base: All respondents who believe they have a product which could be exported W1 (749), W2 (800)

As shown in Figure 6.6, the perceived barriers amongst £500k+ SMEs/MSBs were closely aligned with those of the wider business population, with concerns about being too costly (14%) and having to deal with legal or tax regulations and standards (13%) being the two main factors.

**Figure 6.6: Perceived barriers to exporting amongst £500k+ SMEs/MSBs which could potentially export or which already do (responses mentioned by 5%+)**



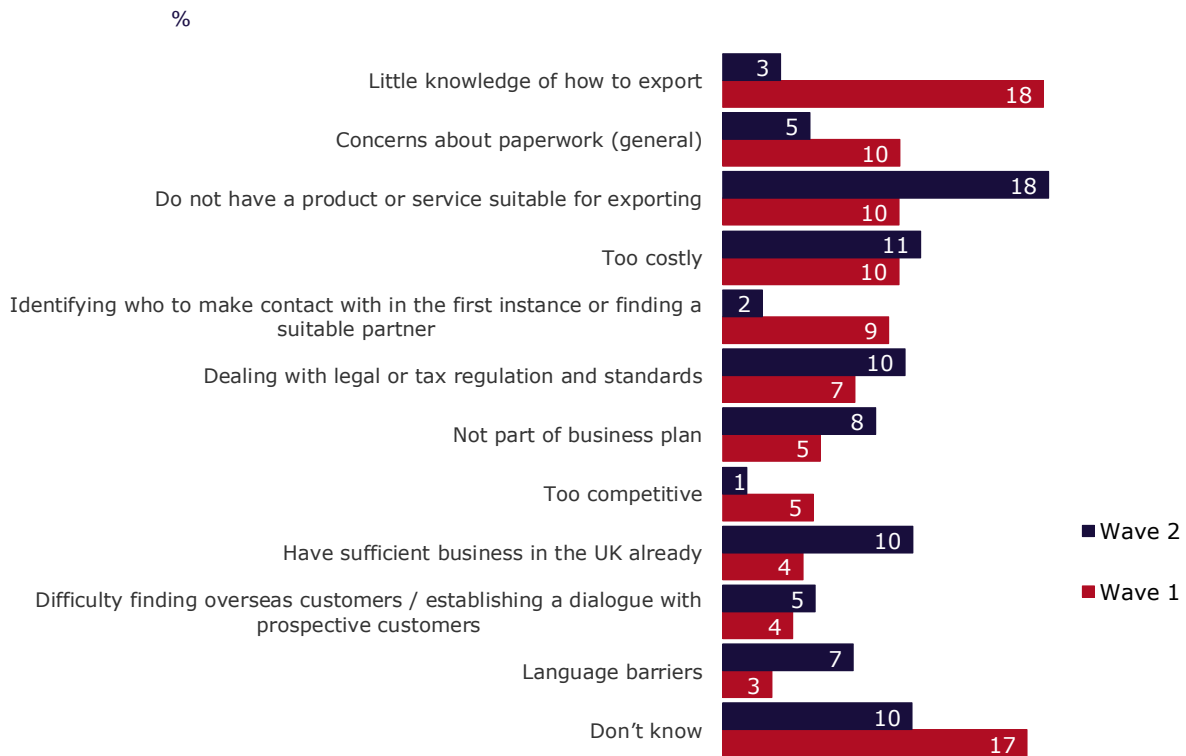
Source: EXPN - What are the barriers that prevent your business exporting or if already exporting, what have been the key barriers you had to overcome?

Base: All £500k+ SMEs/MSBs who believe they have a product which could be exported W1 (650), W2 (656)

It is interesting to note that dealing with legal or tax regulation and standards was more frequently mentioned as a barrier by firms with a turnover of £25m to £500m (MSBs) (22%) than those with a lower turnover (14% of those with a turnover of £2m up to £25m and 12% of those with a turnover of £500k up to £2m).

At Wave 2, similar issues were to be found in the Promote segment, though this group were more likely to say that exporting was not a part of their business plan (8%) or to feel that they already have enough business in the UK (10%). It should be noted that the base size for the data shown in Figure 6.7 is relatively small (127 at Wave 1 and 130 at Wave 2) and the scale of changes between waves may therefore be exaggerated.

**Figure 6.7: Perceived barriers to exporting amongst the Promote segment (responses mentioned by 5%+)**



Source: EXPN - What are the barriers that prevent your business exporting or if already exporting, what have been the key barriers you had to overcome?

Base: Promote segment - all respondents who believe they have a product which could be exported W1 (127), W2 (130)

Any businesses which reported that they had plans or an active interest in exporting were asked who or what had encouraged them to consider exporting. As discussed in Section 4.5, the number of businesses falling into this category was small (29 amongst all businesses), so firm conclusions regarding drivers of interest in exporting cannot be drawn. However, the most commonly cited reasons were 'demand for products from the UK' (mentioned by around a quarter of these firms) and a general sense that there were 'opportunities in overseas markets' (mentioned by around a fifth of these firms).

### 6.3 Receiving advice

Businesses were asked about whether they had ever sought external business support or advice and, more specifically, whether they had ever sought advice and support about exporting. They also gave their opinion on the extent to which such advice is useful. These points are discussed in turn below.

### 6.3.1 Use of general business support or advice

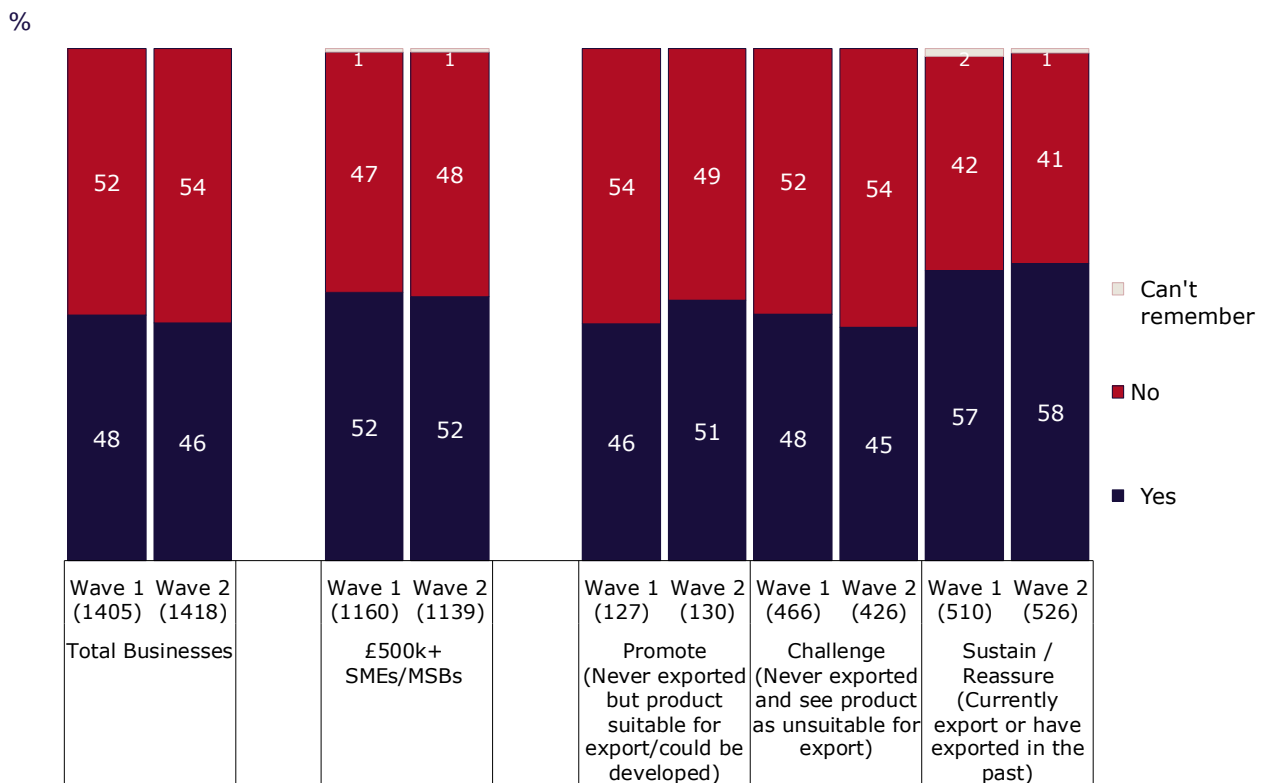
As shown in Figure 6.7, the likelihood of a business having sought external business support or advice before was consistent across waves. At Wave 2, around half of all businesses (46%) and SMEs/MSBs (52%) reported having sought business advice or support.

Those in the Sustain/Reassure segments were more likely to have sought external advice (58%) than those in the Challenge segment (45%).

Businesses with a turnover of £25m to £500m (MSBs) were more likely to have sought external business support or advice (65%) than those with lower turnovers (55% amongst those with a turnover of £2m up to £25m and 49% amongst those with a turnover of £500k up to £2m).

Businesses in the North of England were the most likely to have sought advice (55%) and those in the Midlands the least likely (44%).

**Figure 6.7: Whether businesses have ever sought external business support or advice**



Source: EXPAD\_A - Have you ever sought external business support or advice?

Base: All respondents

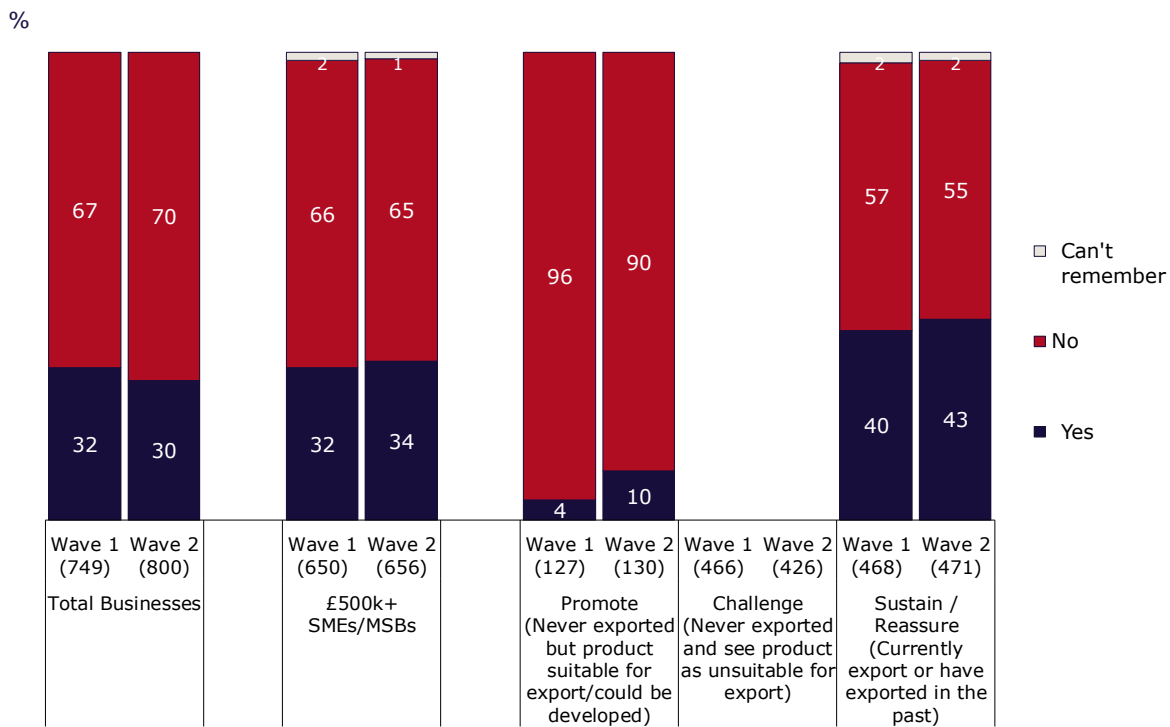


### 6.3.2 Use of advice and support about exporting

As might be expected, businesses were less likely to have sought advice and support specifically about exporting than they were to have sought more general business support or advice. Overall, around a third of all businesses (30%) at Wave 2 had sought help with exporting (see Figure 6.8). The proportion amongst £500k+ SMEs/MSBs was very similar (34%).

Even amongst those in the Sustain/Reassure segments, who had actively engaged in exporting, only around four in ten (43% at Wave 2) had ever sought advice or support. The incidence of seeking advice on exporting amongst the Promote group was, unsurprisingly, much lower (10% at Wave 2). While the direction of travel (from 4% at Wave 1 to 10% at Wave 2) is positive, this does not represent a statistically significant increase and merits further monitoring in future waves of the survey.

**Figure 6.8: Whether businesses have ever sought advice and support about exporting**



Source: EXPAD\_B - Have you ever sought advice and support about exporting?  
 Base: All respondents

### 6.3.3 Where to go for support, advice or information

Amongst those who believed their products were potentially suitable for export, the most common choice when asked what they would do if they were looking for support, advice or information about

exporting was to search online or use Google. This general response was given by 33% of all businesses and by 32% of £500k+ SMEs/MSBs. To a certain extent this can be viewed as a response which indicates that these respondents didn't actually know where they could get support, advice or information. A further 10% of £500k+ SMEs/MSBs and 9% of all businesses explicitly said that they did not know.

Amongst the more specific responses, the most common were that businesses would talk to their business networks or trade associations (12% amongst all business, 13% amongst £500k+ SMEs/MSBs), talk to the Chambers of Commerce (8% and 12% respectively) or talk to UKTI (8% and 10% respectively).

Amongst the key 'Promote' segment, the proportion giving non-specific responses was even higher – 44% said they would search online and 14% said that they did not know where to go for support, advice or information about exporting.

#### **6.3.4 Interest in using business and support services to assist with exporting**

Businesses with products or services that were suitable for export were also asked how interested they would be in receiving information and business support services to assist with exporting (see Figure 6.9).

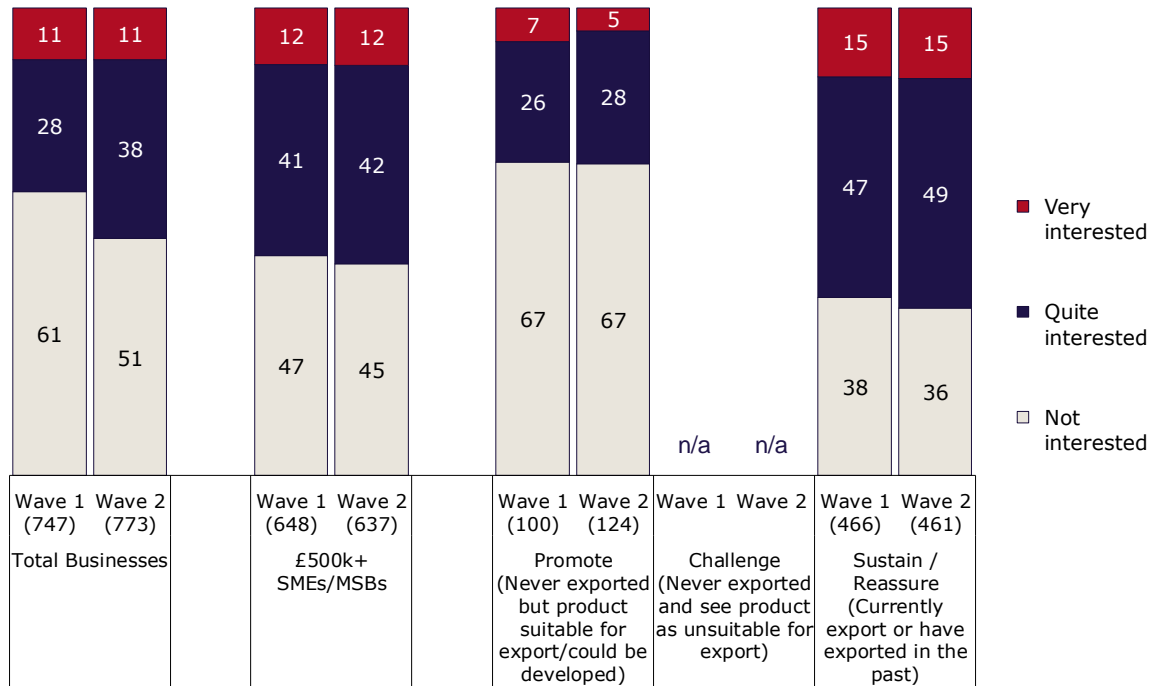
At Wave 2, around half of all businesses (49%) and £500k+ SMEs/MSBs (54%) said that they would be interested, to some extent, in receiving this support. Of these, the large majority said that they were 'quite interested' rather than 'very interested'.

Those in the Promote segment were less likely than those in the Sustain/Reassure segments to be interested in such support, with only around 1 in 20 at Wave 2 (5%) saying they were 'very interested'. This will partly be a function of the fact that while many of the Promote companies are technically able to export, they are not (yet) actively interested in doing so.

Indeed, amongst all businesses there has already been some progress in this respect, with an increase from 28% at Wave 1 to 38% at Wave 2 in the proportion that would be 'quite interested' in receiving support.

At Wave 2, those who were aware of the *Exporting is GREAT* campaign were significantly more likely to be interested in receiving support than those who were not. Amongst £500k+ SMEs/MSBs, only 36% of those aware of the campaign said they were *not* interested, compared to 54% of those unaware of the campaign.

**Figure 6.9 Level of interest in receiving information and business support services to assist with exporting**



Source : ADVGOVT – How interested would your business be in information and business support services that can assist you with exporting?

Base : All respondents who believe products and services can be exported and want to find out more about it

At Wave 1 an additional question was asked of those businesses interested in receiving exporting information or support. The question prompted respondents with three options and they were asked to select which they would prefer to receive information or support from. The options were; government; private industry; both government and private industry.

The responses to this question highlighted the vital role of government in providing advice and support on exporting. Only 3% of the total business respondents said that they wanted information and support only from private industry, compared to 29% who only wanted government input and 68% who wanted a mix of government and private industry support.

There was a similar story amongst £500k+ SMEs/MSBs , 8% of whom said that they wanted information and support only from private industry, compared to 29% who only wanted government input and 63% who wanted a mix of government and private industry support.

#### 6.4 Awareness of exporting websites

Those businesses which showed some interest in receiving exporting advice were asked what websites they were aware of which provided support, advice or information to businesses thinking about exporting. By far the most common response at Wave 2 was that businesses 'don't know' – a response given by 56% amongst the total business sample and 57% amongst £500k+ SMEs/MSBs.

In terms of more specific responses, the most common response was the gov.uk website (13% amongst all businesses and 15% amongst £500k+ SMEs/MSBs). The HMRC website (11% and 7% respectively) and the UKTI website (9% amongst all business and 10% amongst £500k+ SMEs/MSBs) were the second the third most frequently cited sources. The *Exporting is GREAT* website was mentioned by less than 1% of businesses.

#### 6.5 Types of exporting advice that are perceived as useful

Businesses which initially expressed some interest in receiving advice or support on exporting (49% of all businesses and 54% of £500k+ SMEs/MSBs) were also asked a prompted question to determine the *types* of exporting advice or support which they would find useful in the next two to three years.

The codes prompted at this question were refined in the Wave 2 questionnaire – as such the Wave 1 data are not included in this report.

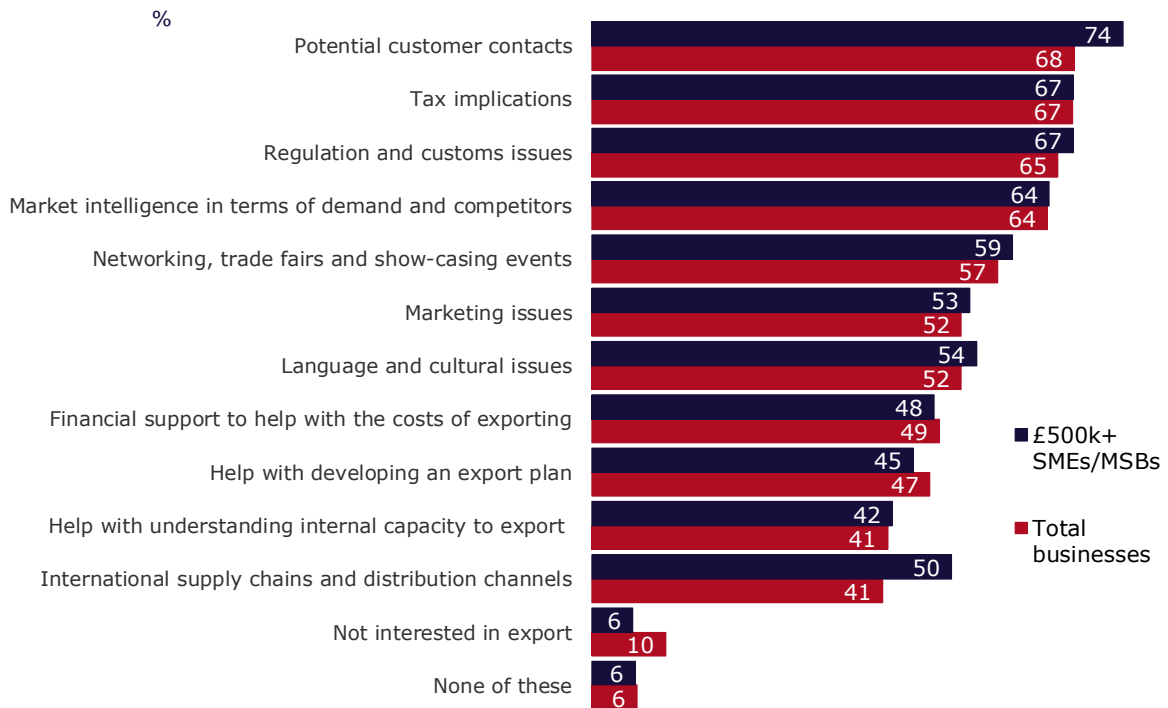
As shown in Figure 6.10, while the provision of potential customer contacts was the most popular choice (mentioned by 74% of £500k+ SMEs/MSBs), many of the other types of advice also scored highly.

Both matters relating directly to sales issues (sourcing customer contacts / obtaining market intelligence in terms of competitors and demand / marketing issues) and matters relating to the *process* of exporting (tax implications / regulation and customs issues / language and cultural issues) were seen as being areas where support would be welcomed.

Results amongst £500k+ SMEs/MSBs were broadly in line with those amongst all businesses, though the SMEs/MSBs were slightly more likely to see help with customer contacts and international supply chains/distribution channels as useful.

Businesses with a turnover of £25m to £500m (MSBs) at Wave 2 were particularly likely to identify regulation and customs issues as an area where they would appreciate support (80%). They were also more open to support on international supply and distribution channels (61%) than were companies with lower turnovers. Around seven in ten MSBs identified support with tax implications (72%) and market intelligence in terms of demand and competitors (72%) as being potentially useful.

**Figure 6.10: Types of advice on exporting which would be useful in the next two to three years – all businesses vs. £500k+ SMEs/MSBs (answers mentioned by 3%+)**



Source: Which of these kinds of advice or support in relation to export/selling your products/services overseas would you find useful in the next two to three years?

Base: All respondents who believe products and services can be exported and want to find out more about it – All: 773  
SME/MSB: 637

## 6.6 Potential policy and campaign implications

The relatively modest self-reported knowledge of exporting amongst senior decision makers suggests that there is a certain lack of confidence at play, even amongst those companies which currently export or have exported in the past. For example, only 50% of those in the Sustain/Reassure segment reported a high level of knowledge about exporting. As such, the potential benefit of continuing to provide information support to current and lapsed exporters should not be overlooked.

Although there are signs of improvement in knowledge levels relating to exporting in the Promote segment, this appears to have been around relatively low thresholds (i.e. businesses moved from low to moderate knowledge levels rather than from moderate to high). As such, it would seem important to focus on improving knowledge levels, potentially by signposting to relevant support services. This

would appear to be potentially beneficial to a broad spectrum of businesses, including those who currently export.

Businesses frequently felt that their business was only 'local' or that their product or service was not transportable. In many such cases there will be genuine barriers in this respect but it is nevertheless worth challenging businesses to reassess their assumptions. The messaging of the *Exporting is GREAT* campaign to date has already attempted to address these issues to some extent by describing cases where unexpected products have successfully been exported.

More broadly, it was apparent that a wide range of barriers to exporting were cited by businesses and messaging on each of them separately in future campaign activity would be challenging.<sup>21</sup> As such, it may be a more realistic aim to message more generally along the lines that 'support is available'.

Highlighting a single central source of information (even if it is one that refers onwards to other organisations or websites) would seem a good way to ensure that businesses are clearer about the support available to them. This is particularly the case given the large diversity of responses given by businesses when asked about where they would go for information about exporting. This, coupled with the high proportion saying that they would have to search online for information (or that they simply didn't know where to source it), suggests that there is a lack of any clear pathway to obtaining information about exporting. This again underlines the potential benefits of messaging on support in later stages of the *Exporting is GREAT* campaign and establishing a 'brand' in terms of a single website or organisation that should be businesses' first port of call when they are seeking support or information. There has already been messaging relating to the *Exporting is GREAT* website, which would seem to offer a natural fit, but this would need to be made a more central element of any communications activities if awareness is to increase significantly.

More immediately, it will also be vital to ensure that GREAT landing pages (or other government advice sites) continue to feature strongly in any online search results. Bearing in mind the recent changes to departmental structure, it will also be necessary to ensure strong signposting from legacy UKTI sites/helplines to the new DIT equivalents.

Relatively few businesses had sought advice or support to help address potential issues. Even amongst those in the Sustain/Reassure segments, who had actively engaged in exporting, only around four in ten (43% at Wave 2) had ever sought advice or support. As such, it appears that the

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<sup>21</sup> Further data on the barriers to exporters can be sourced from the UKTI's Internationalisation Strategies, Barriers & Awareness Survey 2014. Whereas the data shown in Figure 6.5 is made up of businesses' spontaneous (top of mind) barriers, the Internationalisation report gives insights into issues that are seen as barriers when specifically prompted to businesses which are currently exporting or plan to do so within 12 months.

majority of exporters effectively go it alone and this would appear to represent an opportunity, particularly in respect to the objective of increasing the value of exports – providing additional support to current exporters may well help them to expand their operations into new markets or product lines.

Furthermore, the incidence of seeking advice on exporting amongst the Promote group was, unsurprisingly, relatively low (10% at Wave 2). It is likely that companies will seek this help as part of their journey towards exporting and changes in this measure may well serve as an early indication of more concrete moves towards exporting. As such, it would be hoped that this is a measure which will see improvement as the *Exporting is GREAT* campaign continues.

## 7 Advertising awareness

### 7.1 The campaign

#### Campaign aims

The campaign was targeted particularly at businesses in the UK who do not currently export but could because they have a product or service that is potentially exportable (the Promote segment), and those who do not consider exporting because they do not believe there is suitable demand for their products and services overseas (the Challenge segment). The campaign represented the first stage in converting the UK's 'could-be' exporters. The intent was to inspire businesses to take their first steps by showing them the real demand that is out there for British products and services. This involves showing them live tangible export opportunities and encouraging them to look at overseas sales for opportunities for growth for their firm.

The key aims of the campaign were to raise awareness and interest in export opportunities and to produce a positive change in firms' attitudes and behaviour towards exporting, with the longer term goal of businesses actively taking their first steps towards doing business overseas.

#### Campaign timing

The campaign was launched in November 2015 with a first wave of media activity. A second burst of activity ran from mid-February to early April 2016. Figure 7.1 shows the timing of these bursts of activity, by paid media used.

**Figure 7.1: Campaign timing by media**

	November 2015					Feb 2016			Mar				Apr
	2	9	16	23	30	15	22	29	7	14	21	28	4
Online													
Digital Display													
Radio													
TV													
VOD													
Press													



The main campaign was launched on 8<sup>th</sup> November, using owned and earned media. Some digital display and online activity continued in December in a sustain phase between the two bursts.

Some paid for media activity at the second burst was back-loaded towards the end of the campaign (shown in darker blue in Figure 7.1). The radio campaign was up-weighted nationally from 21<sup>st</sup> March onwards, and the Digital Display ads were up-weighted in the week of 28<sup>th</sup> March.

In addition there was activity at both bursts using owned media, including a regional bus tour, celebrity ambassadors, a digital hub and export week. There was also activity using earned media including PR activity, commercial partners and an announcement from the Prime Minister.

**Figure 7.2: Campaign spend by media and burst of activity**

Proportion of total spend by media	Nov-15	Feb-Apr 16	TOTAL
TV/VOD	29%	22%	51%
Online (PPC/Social/Digital display)	12%	16%	28%
Radio	5%	8%	13%
Digital Display Out Of Home (DOOH)	6%	0%	6%
Press	2%	0%	2%
<b>% total spend at each burst</b>	<b>55%</b>	<b>45%</b>	<b>100%</b>

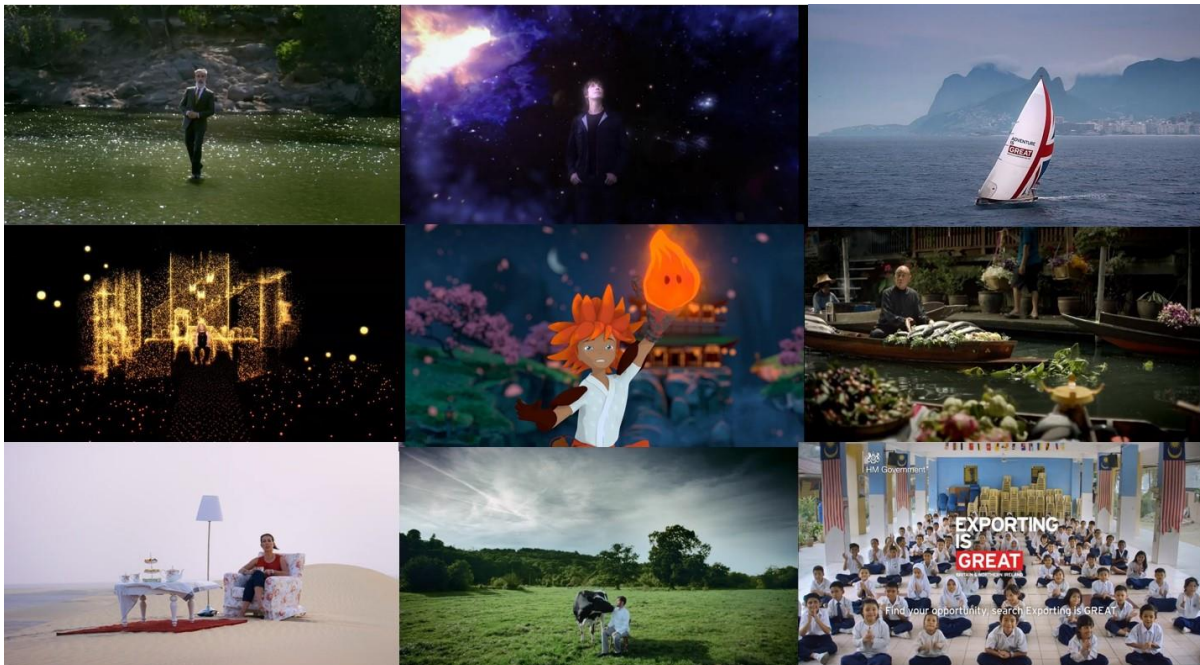
TV ads accounted for half of total spend, with a slightly higher weighting at the first burst. Online made up 28% of total spend, slightly heavier at the second burst. Radio spend, at a total of 13% was also weighted slightly towards the second burst. Digital-display Out Of Home (DOOH) ads accounted for 6% of spend, and press ads just 2% - both of these media were used only at the first burst.

### The ads

As set out above, the campaign included ads on TV (including VOD), radio, online (both stills and video), digital OOH display and press. The ads illustrated the wide ranging demand for UK business products and services in a range of sectors and in a wide variety of countries around the world, and included a direct call to action visit the 'exportingisGREAT.gov.uk' website or to search online for *Exporting is GREAT*. A range of images from the campaign are shown in Figure 7.3.

Figure 7.3: Campaign images

TV ad (stills)



Press ad



Online and digital display ads

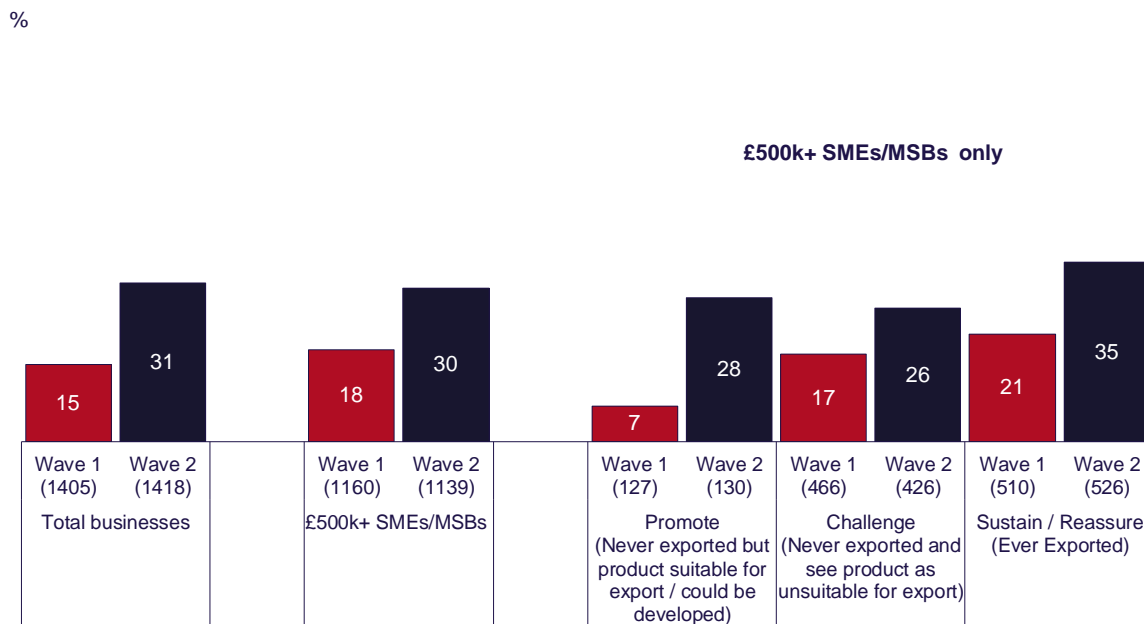


## 7.2 Spontaneous awareness

Spontaneous awareness of 'any information or advertising encouraging businesses to think about exporting' was measured at Wave 1 to provide a baseline, pre-campaign, and again at Wave 2 to provide a measure immediately after both bursts of activity. It is not possible to identify definitively whether or not respondents who recalled something were thinking specifically of the *Exporting is GREAT* campaign, although increases in awareness between Wave 1 and Wave 2 are likely to reflect the impact of the campaign on spontaneous awareness.

As shown in Figure 7.4, spontaneous awareness doubled among all businesses from 15% at Wave 1 to 31% at Wave 2, after the campaign had aired.

**Figure 7.4: Spontaneous awareness of exporting advertising/promotion**



Source : AD\_AWARE – In the last [WAVE 1: couple of months][WAVE 2: six months], have you seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting?

Base : All respondents

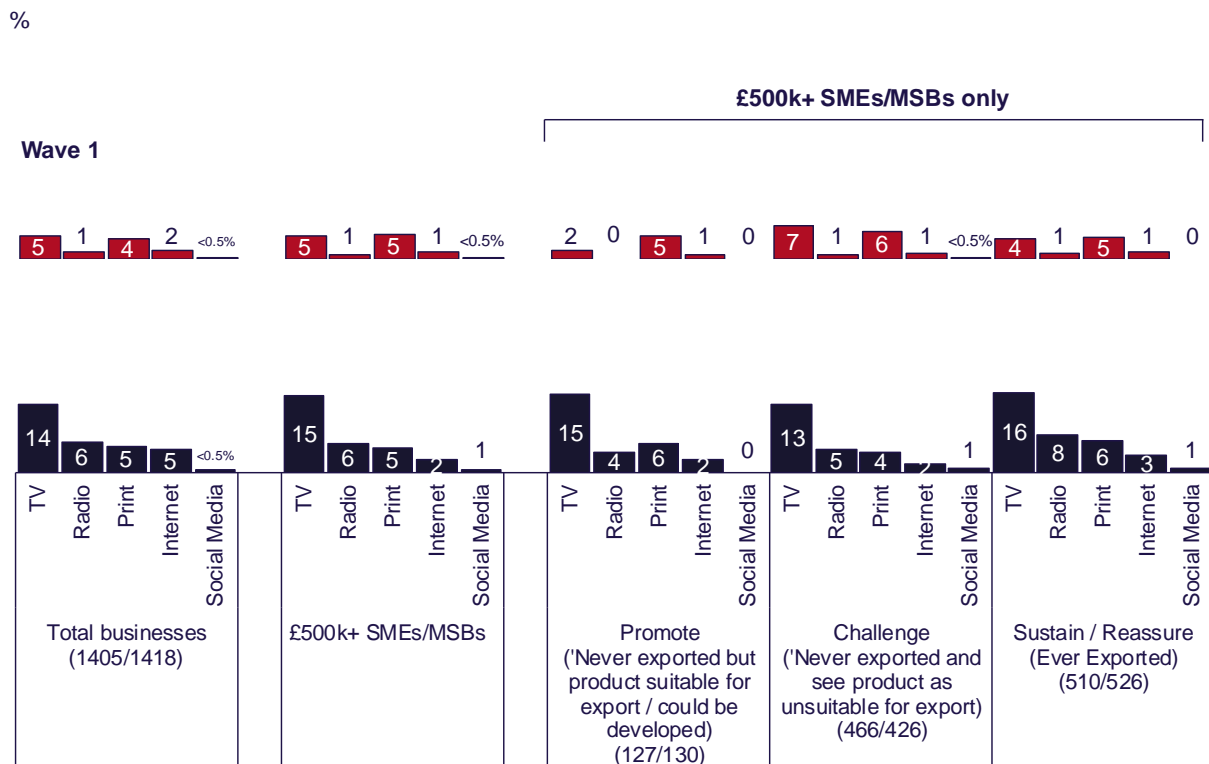
There was a similar increase for £500k+ SMEs/MSBs from 18% to 30%. The greatest increase was for the Promote segment, from 7% to 28%. Those in the Sustain/Reassure segments, who had already exported, were more likely to already be aware of some information or advertising at Wave 1

(21%) but this increased further to 35% at Wave 2, post-campaign. This was significantly higher than was seen amongst the Challenge segment (26% at Wave 2). The Challenge segment were fairly likely to have seen something already at Wave 1, pre-campaign (17%) and this did not increase significantly at Wave 2.

Awareness at Wave 2 was higher amongst businesses with a turnover of £25m to £500m (MSBs) compared with those with a turnover of £500k to £2m (40% and 28% respectively), reflecting the greater likelihood of the larger businesses to export already.

When asked where they had seen or heard this information or advertising, the main source of spontaneous awareness at Wave 2 was television, as shown in Figure 7.5. Awareness of any information or advertising on TV increased from 5% at Wave 1 to 14% at Wave 2 among all businesses, with a similar increase for £500k+ SMEs/MSBs. There was also an increase in awareness of advertising or information on the radio from 1% at Wave 1 to 6% at Wave 2 among all businesses and £500k+ SMEs/MSBs.

**Figure 7.5: Source of spontaneous awareness of exporting advertising/promotion (nets by media)**



Source : AD\_SOURCE – Where did you see or hear this information or advertising?

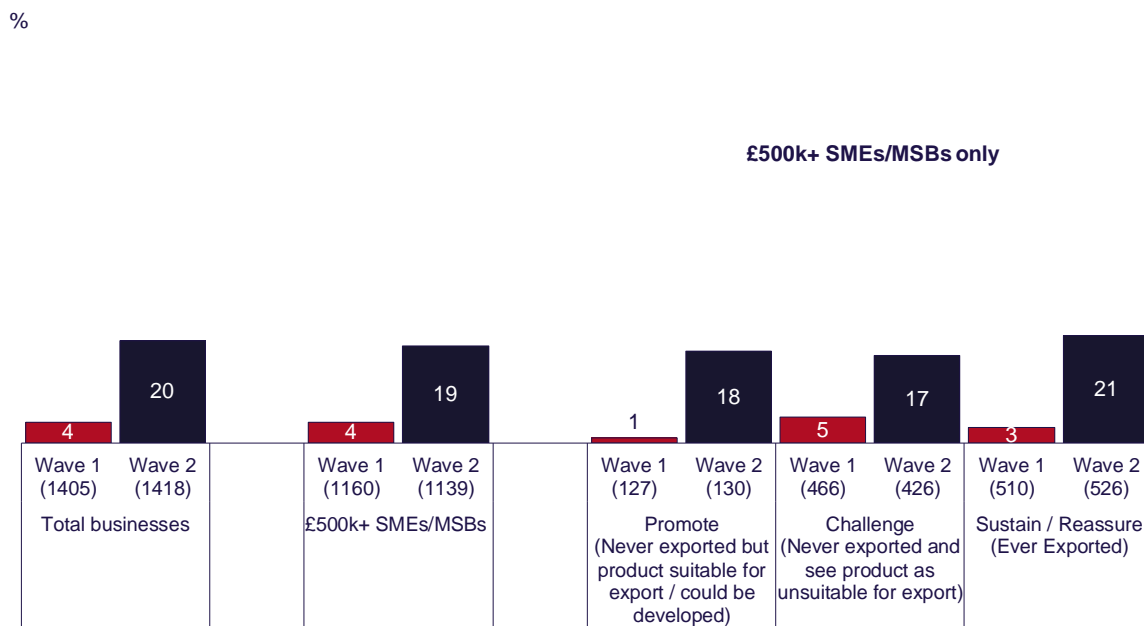
Base : All respondents (wave 1 / wave 2)

At Wave 2 there was similar spontaneous awareness of each of radio, print and internet information or advertising (around one in twenty businesses). There was no increase in awareness of print ads or information from Wave 1 to Wave 2. There was a small but statistically significant increase in awareness of information on the internet among all businesses, from 2% to 5%, but this was not seen among £500k+ SMEs/MSBs. Awareness of information on social media was very low.

At Wave 2, spontaneous awareness of social media (3%) and the internet (6%) was slightly higher for businesses in the manufacturing sector than those in other sectors, although these were still fairly low.

An increase in those specifically citing advertising (in any media) as the source of their awareness from 4% of all businesses at Wave 1 to 20% at Wave 2 offers further evidence of the campaign being recalled at a relatively top of mind level. A similar increase was seen for £500k+ SMEs/MSBs and in all three segments, as shown in Figure 7.6.

**Figure 7.6: Spontaneous awareness of exporting advertising in any media**



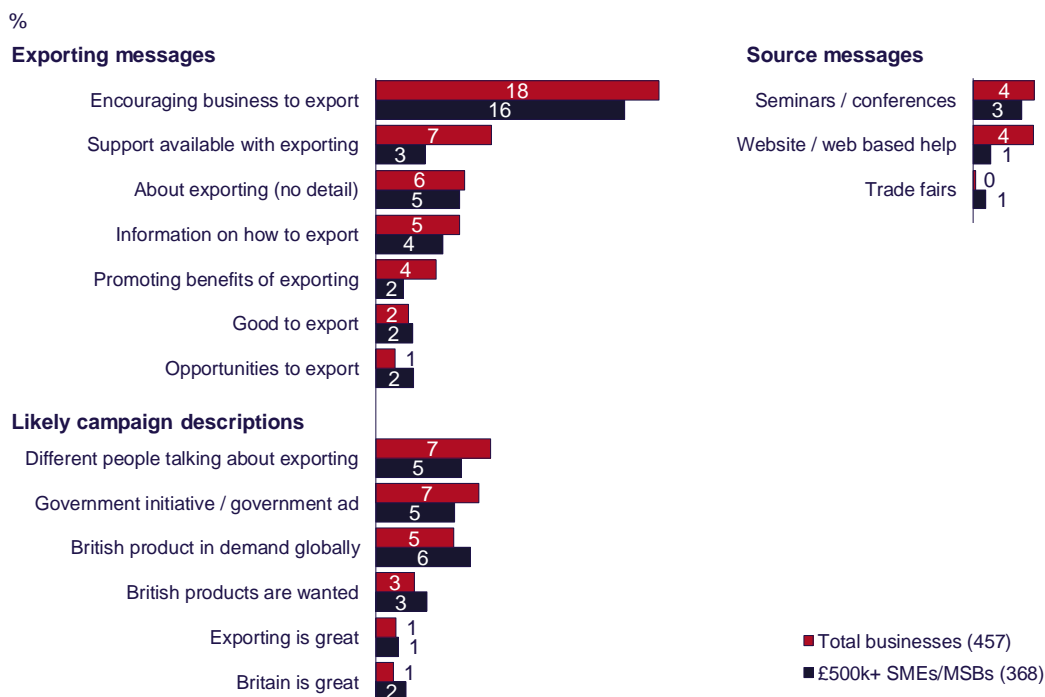
Source : AD\_SOURCE – Where did you see or hear this information or advertising?

Base : All respondents (wave 1 / wave 2)

At Wave 2 respondents who recalled seeing any information or advertising were asked to describe in their own words what they had seen and who they thought was responsible for the advertising, to provide further evidence of whether they were recalling the *Exporting is GREAT* campaign. Figure 7.7 shows the answers spanning the three main themes reported: messages related to exporting, descriptions that reflect the content of the campaign (offering possible evidence of campaign recall) and sources of information. The message reported most often was the main message of the campaign: encouraging businesses to export (18% of all businesses who recall some advertising), with other exporting-related messages each recalled by around one in twenty, including the support available and information on how to go about it.

Descriptions that related more directly to the execution of the campaign were given less often (each given by around one in twenty or fewer of those who recalled anything), and the most frequent responses included different people talking about exporting, government advertising, and British products being wanted or in demand. A small number cited 'Exporting is great' and 'Britain is great'.

**Figure 7.7: Description of information or advertising recalled**



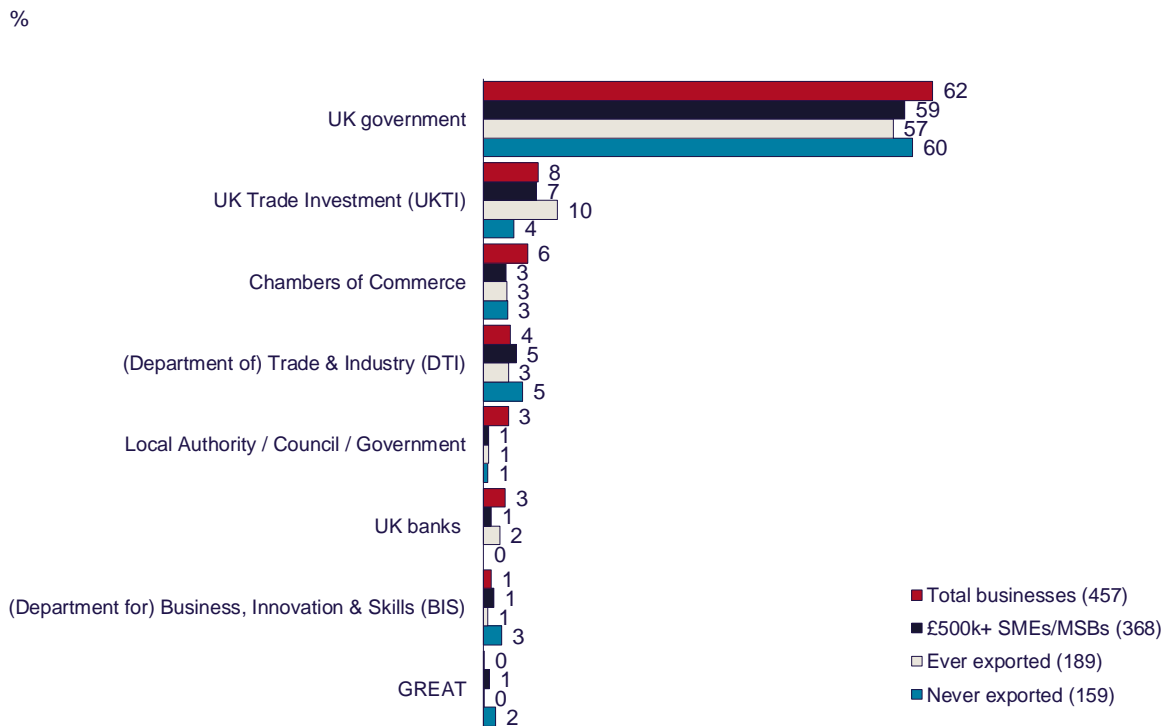
Source : AD3 – Please can you describe in detail what you remember about this information or advertising?

Base : All respondents who recalled some advertising or information at Wave 2

£500k+ SMEs/MSBs who had previously exported were more likely to recall information on how to export (9% compared with no businesses who have not exported), and less likely to report awareness of publicity encouraging businesses to export (10% compared with 20% of businesses that had not previously exported).

Businesses were also asked who they thought was responsible for the information or advertising they had seen. Six in ten of those who recalled something attributed it to the UK government, far higher than any other source, as shown in Figure 7.8. Most other sources cited by more than one per cent within any of the four sample groups were also from the public sector, with the exception of Chambers of Commerce and UK banks. The UKTI was second most cited, and this was more common for those in the manufacturing and finance/professional/technical/creative sectors (each 13%).

**Figure 7.8: Who was responsible for the information or advertising recalled**



Source : AD4 – Who do you think was responsible for the information or advertising you remember seeing?

Base : All respondents who recalled some advertising or information at Wave 2

Showing all responses given by more than 1% of any of the sample groups

### 7.3 Prompted campaign recognition

Prompted recognition of the campaign gives a more accurate measure of campaign reach as the process of prompting respondents with campaign materials effectively removes other non-campaign related publicity about exporting from responses. Since the interview was conducted by telephone, which does not allow visual prompt materials to be shown, a short URL was read out to respondents, who were asked to access a website during the interview, and to view/listen to a selection of the adverts, and then report whether or not they recognised them. Around two in ten respondents were not able to view any of the ads, so recognition is measured among the (around) eight in ten respondents who were able to see any of them. Figure 7.9 shows the numbers of respondents able to view the ads in each media during the interview. Base sizes were particularly low for the radio ad which is a function of the fact that some respondents were wary about playing audio files in the office environment (which is typically where they were at the time of the interview).

**Figure 7.9: Number of respondents able to view ads in each media during interview**

	Total sample	£500k+ SMEs/MSBs			
		All	Promote	Challenge	Sustain/reassure
TV	1096	896	98	324	435
Radio	869	693	68	256	344
Digital Display/online	1129	922	103	354	443
Press	1121	915	104	334	438
At least one medium	1146	936	105	342	447

#### 7.3.1 Total campaign recognition

Total campaign recognition (i.e. recognition of at least one of the ads) is based on those respondents who were able to view an ad in at least one of the media. This may slightly under-represent true recognition, as some of these respondents will not have been able to view or hear all of the ads.

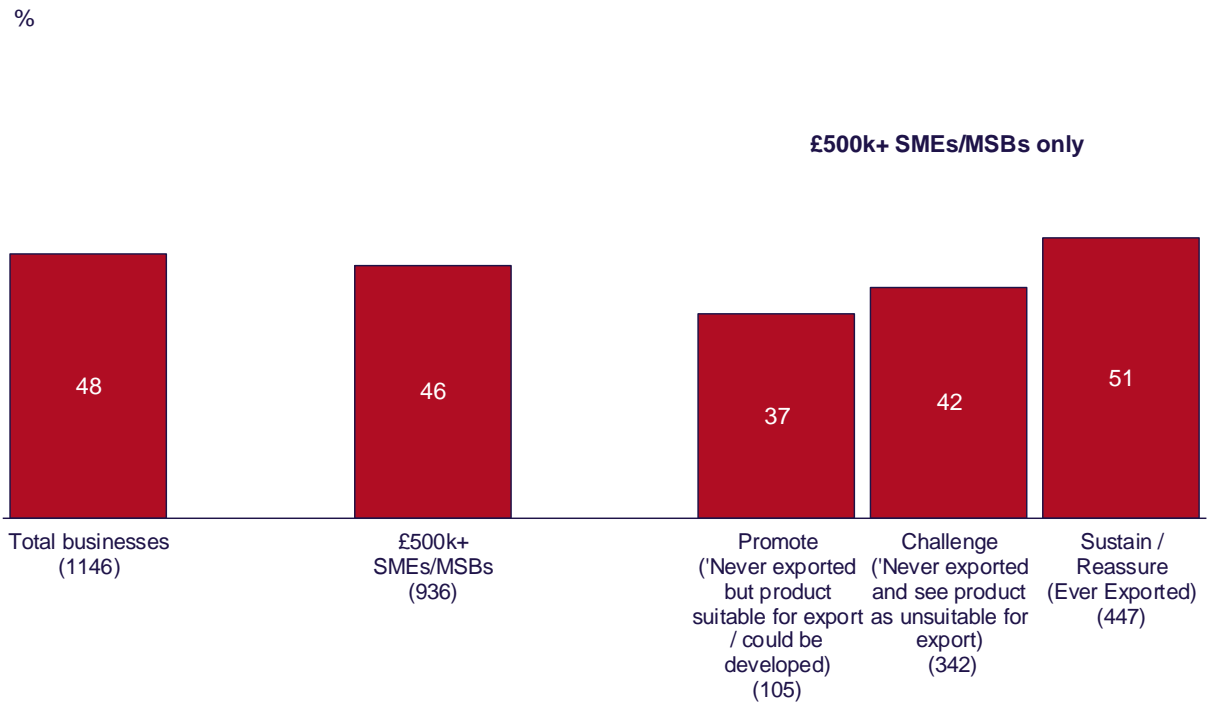
As shown in Figure 7.10, just under half of businesses recognised at least one of the ads: 48% of all businesses and 46% of £500k+ SMEs/MSBs. Recognition was higher among those who in the Sustain/Reassure segments (51%) than for those in either the Promote (37%) or Challenge (42%) exporting segments.

Offering evidence that at least some of the spontaneous recall of information or advertising was driven by the campaign, 77% of £500k+ SMEs/MSBs who had recalled something spontaneously recognised the campaign, compared with 31% of those who had not spontaneously recalled anything.



Recognition levels did not vary by turnover, region, sector or plans to grow the business.

**Figure 7.10: Campaign recognition (any of ads)**

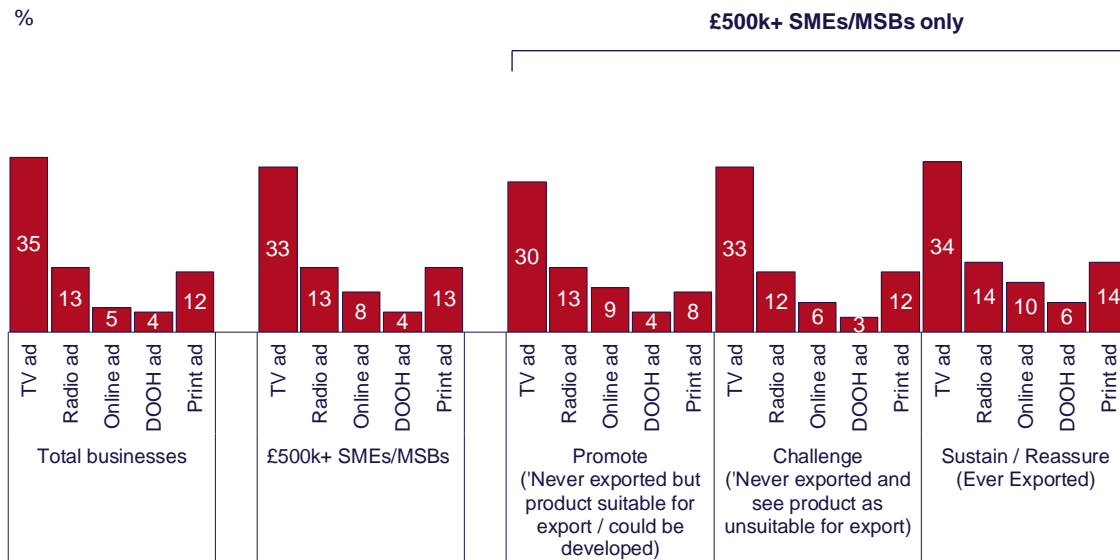


Source : Net of 'yes' respondents at AD6-9 – Have you seen this advert (or one in a similar style) in the past 6 months or so?

Base : All respondents able to see at least one of the ads prompted during the interview at Wave 2

### 7.3.2 Campaign recognition by media

Campaign recognition was driven by the TV ad, which was recognised by 35% of businesses, as shown in Figure 7.11. Recognition was lower for radio ads (13%) and print ads (12%). Essentially the same executions were used for both online ads and DOOH (Digital Out Of Home) ads. 5% of businesses recalled seeing the online ads, 5% the DOOH ads and a number of respondents recalled the executions but couldn't remember where they had seen them. Overall 14% of businesses recognised the DOOH/online executions. This suggests that, overall, radio, print and display ads all played a fairly equal role in driving recognition.

**Figure 7.11: Campaign recognition by media**


Source : AD6-9 – Have you seen this advert (or one in a similar style) in the past 6 months or so?

Base : All respondents who were able to view the prompt materials for each advert during the interview at Wave 2 (see Table 7.9 for base sizes)

There were no significant differences in recognition between the different exporting segments shown in Figure 7.11. However, those who had exported in the last 12 months (the Sustain segment) were more likely to recognise the online ad (12%) than those who had never exported at all (7% when the Promote and Challenge segments are combined).

Recognition levels within media did not vary by turnover, region, sector or plans to grow the business, other than a slightly higher level of recognition of the TV ad for those in the manufacturing sector (40%) compared with other sectors.

The dominance of TV ads reflects the greater spend on this channel, as shown in Figure 7.12. However, the best return on spend was for the press ads which achieved 12% recognition for 2% of spend (all in the first burst of advertising). Online ad recognition was low relative to spend, achieving 5% recognition, while accounting for 28% of spend. It is possible that the online recognition figure underestimates the true level of recognition because people could not remember where they had

seen the display ads, as explained earlier. Further evidence of the effectiveness of online spend should be drawn from other metrics such as click through rates and social media mentions.

**Figure 7.12: Campaign recognition and spend by media**

Media	% Recognition	% Spend
TV/VOD	35%	51%
Radio	13%	13%
Online	5%	28%
OOH	4%	6%
Press	12%	2%

### 7.3.3 Campaign benchmarking

There is little benchmarking data available for campaigns aimed at businesses, but comparisons can be made with the 2013-2015 '*Business is GREAT*' campaign. This was aimed at SMEs, and did not use TV ads. It first ran from November 2013 to March 2014 (the same time of year as *Exporting is GREAT* in 2015-2016), with a second burst from July 2014 to March 2015.

Figure 7.13 shows the recognition levels for *Business is GREAT* at three separate points in the campaign.

The top row of data shows campaign recognition after the first burst (when spend was circa 60% of the total *Exporting is GREAT* spend). The second row shows recognition at the point where the *Business is GREAT* campaign spend was in line with the total *Exporting is GREAT* spend. Finally, the bottom row shows recognition at the end of the *Business is GREAT* campaign, by which point spend was around 160% of the total spend on *Exporting is GREAT*.

In particular, the *Business is GREAT* campaign had a higher spend on press ads and (to a lesser extent) on OOH ads.

**Figure 7.13: Campaign recognition for Business is GREAT (2013-15)**

	Total	By media			
		Radio	Online	OOH	Press
By April 2014 (c.60% <i>Exporting is GREAT</i> spend)	21%	NA	6%	11%	12%
After similar spend to <i>Exporting is GREAT</i>	36%	21%	5%	11%	12%
After total spend (c. 160% <i>Exporting is GREAT</i> )	54%	21%	5%	21%	28%

This shows that after its initial November to March burst, *Business is GREAT* campaign recognition had reached 21% of SME. This reflects, however, just 60% of *Exporting is GREAT* spend and the absence of TV ads. After an equivalent spend to *Exporting is GREAT*, the *Business is GREAT* campaign reached 36% recognition – this point was reached after a further five months on air, in November 2014. Even after the full spend (1.6 times that for *Exporting is GREAT*) and after a much longer time on air, campaign recognition only reached a similar level to that achieved by *Exporting is GREAT*. This suggests that the *Exporting is GREAT* has delivered a much stronger return on spend among its target audience in a shorter time, and it appears that this was driven by the additional use of the TV ad.

Comparing recognition by media (for those media used in both campaigns), recognition of the press and online ads was similar at this point in each campaign, with a similar return on spend. However, recognition of the OOH ads and the radio ads was slightly higher for *Business is GREAT* for the equivalent spend.

#### 7.4 Potential policy and campaign implications

The *Exporting is GREAT* campaign appears to have performed relatively well in terms of cutting through to businesses and the use of TV ads in the mix appears to have been a significant factor in this respect. Press ads did, however, also perform well, particularly in terms of the ratio between ad spend and recall.

Beyond advertising recall, the lack of a counterfactual makes it hard to determine how well the campaign performed in terms of communicating specific messages, particularly against the backdrop of the EU referendum campaign. However, as highlighted in Chapter 5 it does appear that

perceptions that there is overseas demand for British products have strengthened (and a majority of companies share this view).

As discussed in Chapter 6, there are potentially other messages which could usefully be communicated in future activities, particularly around the concept that 'support is available'.

## 8 Reported advertising impacts

As discussed in Chapter 7, the key aims of the campaign were to raise awareness of the opportunities available through exporting, and to produce a positive change in attitudes and behaviour towards exporting as an opportunity. Changes in awareness, attitudes and behaviours from Wave 1 to Wave 2 (pre- to post-campaign) were discussed in Chapters 4 to 6, but these cannot be directly attributed to the campaign, as other factors may have also influenced any change. The impact of the EU referendum, in particular, is likely to affect businesses in future, so future waves of evaluation will need to monitor this, alongside the campaign impact.

Furthermore, it is unusual to see any immediate impact of a campaign such as this on attitudes and behaviour. Any such change is usually built up slowly over repeat campaigns over a number of years – initial changes are more typically seen in metrics such as awareness or knowledge of issues.

To give an indication of any immediate campaign impact, at Wave 2 a small number of questions were asked about the impact of the ads respondents had seen and heard during the interview. For around half of respondents this was the first time they had seen the ads, so this provides their initial reaction, while for others (ad recognisers) their previous exposure to the ads may also have played a role. These questions were only asked to those who had been able to view or hear at least one of the ads during the interview.

### 8.1 *Reported campaign impact on interest in finding out more about exporting*

The first step for businesses who were interested in starting to export would be to find out more information, and the campaign call to action was to search online for the *Exporting is GREAT* website in order to do this. More than a quarter (28%) of all businesses viewing the ads said that they had increased their interest in finding out more about exporting, as shown in Figure 8.1.

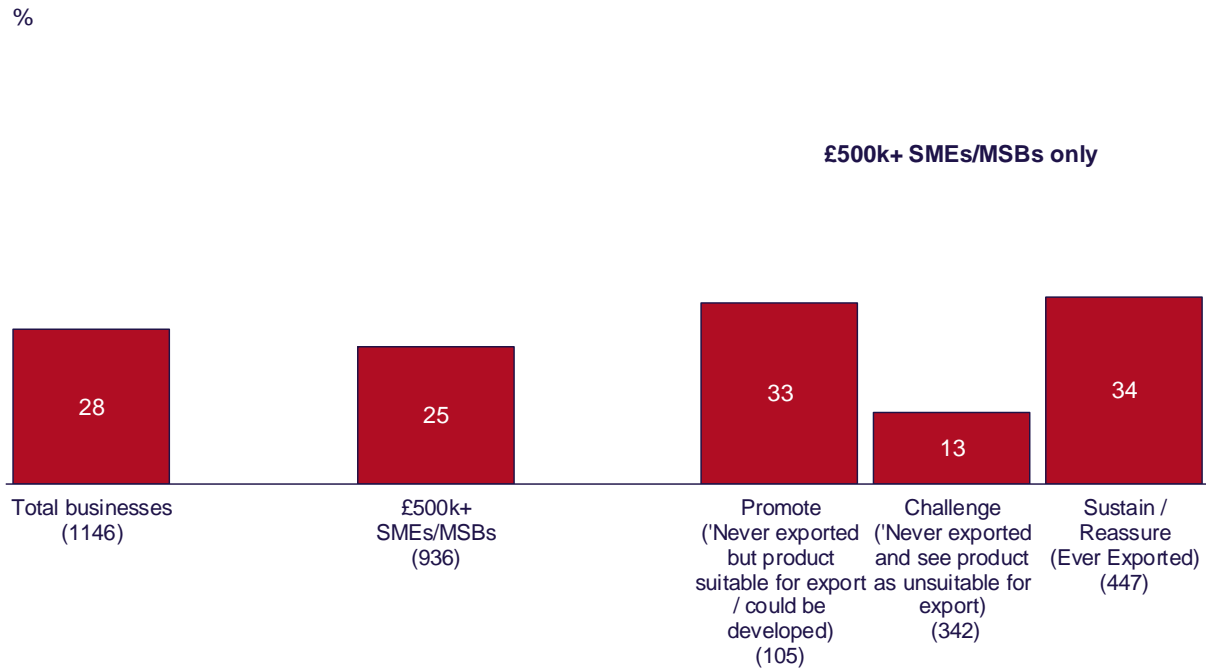
This level is lower than the equivalent question for the *Business is GREAT* campaign at this stage (April 2014), when 47% of SME said the campaign had made them more interested in finding out more information about how to grow their business. This suggests that exporting can present greater barriers to businesses than messages about growth in other ways.

The level among £500k+ SMEs/MSBs (25%) was similar to the level amongst all businesses. This was, however, significantly lower for those in the Challenge segment (who believed their product unsuitable for export) than for those in the Sustain/Reassure segment (13% and 34% respectively). Positively, the key target Promote segment essentially matched the level seen in the Sustain/Reassure segment (33%).

Those who recognised the campaign were more likely to say it had increased their interest (32%) than those seeing it for the first time in the interview (19%). This could reflect a cumulative impact of the campaign, although it is also likely to reflect interest in the campaign message, with those with a greater interest in exporting probably more likely to have noticed the campaign prior to the interview.

£500k+ SMEs/MSBs with a turnover of £2m or more were also more likely to say the campaign had increased their interest in exporting (29%) than those with a lower turnover (22%). There were no differences by sector or region.

**Figure 8.1: Whether adverts increased interest in finding out more about exporting**



Source : AD10 – Thinking about all of the adverts that you've just seen and heard, do these adverts increase your interest in finding out more about exporting?

Base : All respondents able to see at least one of the ads prompted during the interview at Wave 2

In order to better understand potential barriers, businesses who had been able to view the ads, but who said they did not increase their interest in finding out more about exporting were asked to say (in their own words) why this was. Figure 8.2 shows the reasons cited most often within each of the three main themes reported: not wanting to or feeling able to export, already exporting or knowing enough, and problems with the adverts.

As shown in Figure 8.2, by far the biggest reason was that they did not see their business as suitable for exporting, a factor that was cited by 57% of those businesses who were not left wanting to find out more about exporting after seeing the ads.

Already exporting, or knowing enough about exporting was seen almost exclusively among the Sustain and Reassure segments (comprising businesses which had already exported).

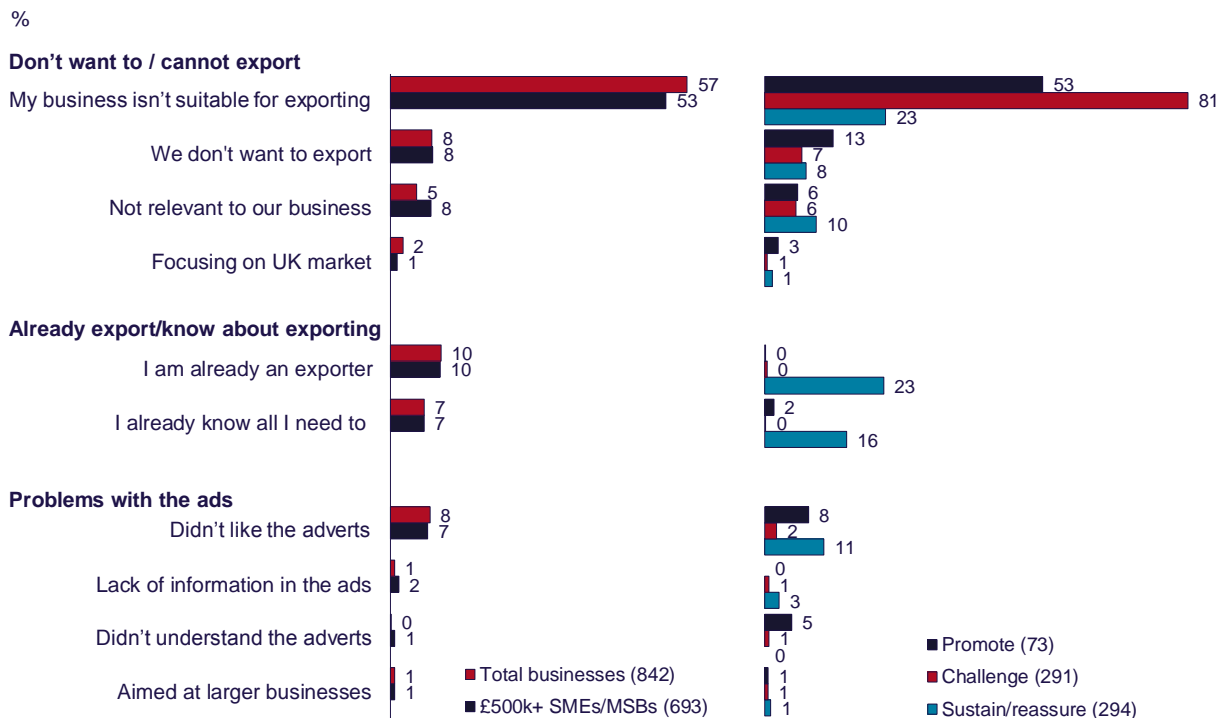
Around one in ten businesses said that they did not like the ads, although this was lower for the Challenge segment at 2% (compared with 11% for the Sustain and Reassure segments). In contrast, those in the Promote segment were more likely to say they did not understand the ads (5%) than those in the Sustain and Reassure segments (0%). A small number felt the ads were aimed at larger businesses only.

Businesses with a turnover of £25m to £500m (MSBs) were less likely to say their business was not suitable for exporting (34%) and more likely to say they already export (23%) or know enough about exporting (15%) compared with those with a lower turnover.

Within England, £500k+ SMEs/MSBs in the North and Midlands (58%) were more likely to say their business was not suitable for exporting, compared with those in the South (44%). By sector, £500k+ SMEs/MSBs in infrastructure (63%) and distribution (56%) were more likely to say their business was not suitable for exporting than those in the manufacturing (39%) and the financial/professional/technical/creative sectors (36%). While those in manufacturing and in the financial/professional/technical/creative sectors were both more likely to say the export already, those in the financial/professional/technical/creative sectors were also more likely to say that exporting was not relevant to their business (17%).



**Figure 8.2: Reasons why adverts failed to increase some businesses' interest in finding out more about exporting**

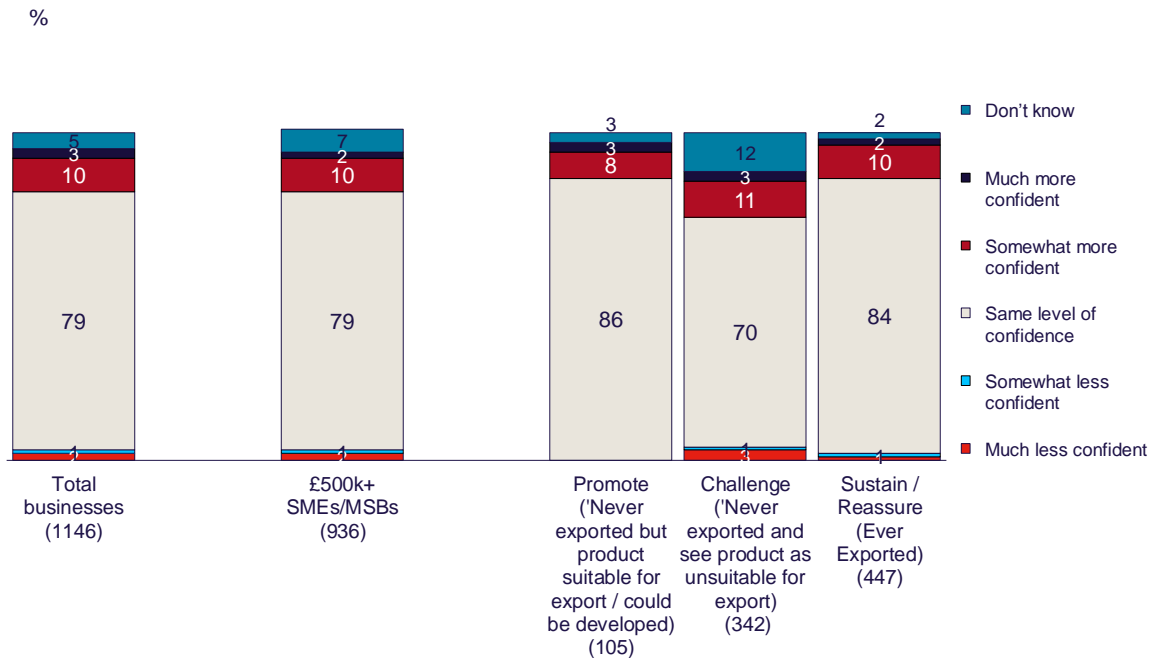


Source : AD11 – Why don't these adverts increase your interest in finding out about exporting?

Base : All respondents able to see at least one of the ads prompted during the interview who said the ads did not increase their interest at AD10 at Wave 2; Showing responses within each theme given by more than 1% in at least one sample group

## 8.2 Reported campaign impact on confidence about exporting

As a second impact measure, those who had been able to view or hear at least one of the ads during the interview were asked to what extent the ads had made them more or less confident about exporting. The majority of these businesses (79%) reported that the ads had not made any difference to their confidence level, as shown in Figure 8.3. Overall 14% said the ads had made them more confident, and 3% that the ads had made them less confident, so on balance the impact of the ads was positive.

**Figure 8.3: Extent to which they feel more confident about exporting as a result of seeing ads**


Source : AD12 – As a result of seeing and hearing these adverts, which of the following applies to you?

Base : All respondents able to see at least one of the ads prompted during the interview at Wave 2

The level of increased confidence is lower than at the equivalent question for the *Business is GREAT* campaign at this stage (April 2014), when 25% of SMEs said the campaign had made them more confident about how they can take steps to grow their business.

£500k+ SMEs/MSBs in the Challenge segment (those who could not see potential to export their products) were less likely to say the ads had not had any impact on their confidence (70%) than those in the other exporting segments. They were not, however, significantly more likely than those in other segments to say the ads had made them more confident or less confident, instead being more likely to say they did not know (12%).

Businesses with a turnover of £25m to £500m (MSBs) were more likely to say the ads had not affected their confidence (86%) than those with a lower turnover, but were not significantly less likely to say they had been made more or less confident, instead being less likely to have said that they did not know (1%).

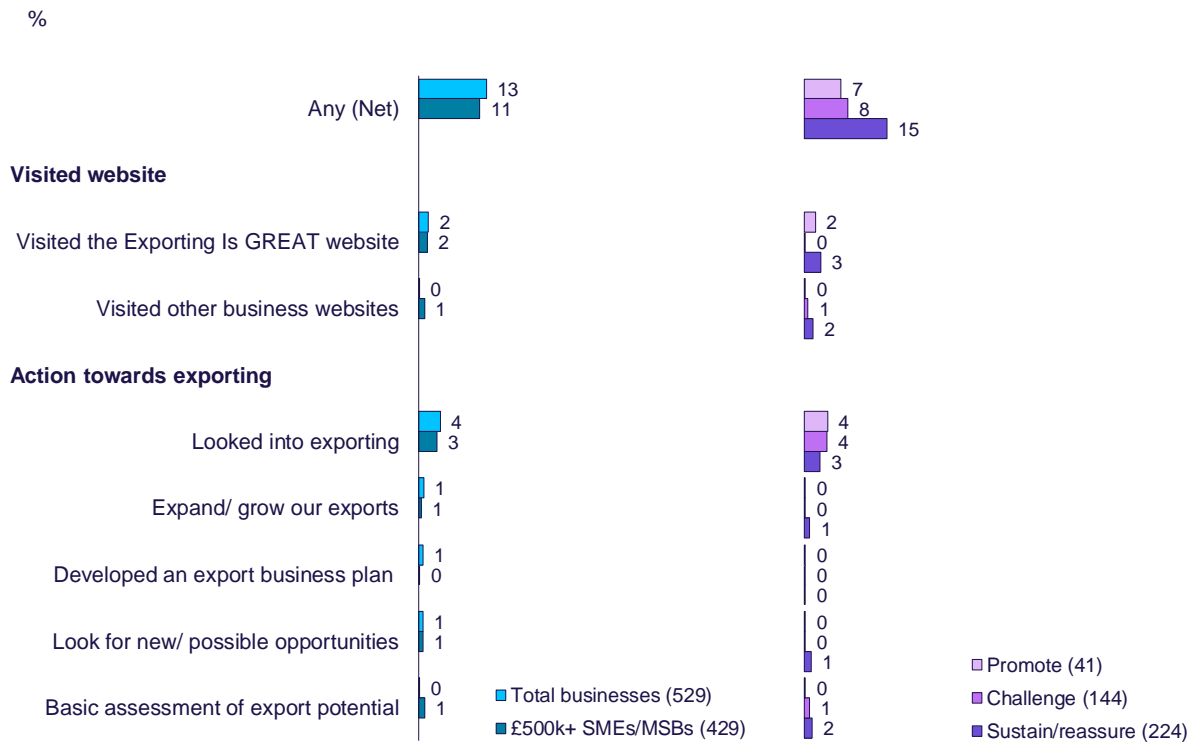
Those who recognised the campaign were more likely to say the ads had made them more confident about exporting (19%) than those who could not recall seeing the campaign prior to the interview (9%). Those who saw it for the first time in the interview were more likely to say it made them less confident (4%) than ad recognisers (1%). As for increased interest, this could reflect a cumulative impact of the campaign, although it is also likely to reflect interest in exporting, with those with a greater interest in exporting probably more likely to have noticed the campaign, pre-interview and, therefore, more open to its message.

### 8.3 *Actions taken after seeing the campaign*

As a more direct measure of campaign impact, respondents who recognised any element of the campaign were asked what, if any, action they had taken or considered taking as a result of seeing the campaign. As shown in Figure 8.4, 13% of all businesses which recognised the campaign reported taking or considering some action, with 2% reporting visiting the *Exporting is GREAT* website – this was the call to action within the ads. The only other response that was mentioned by more than 1% of respondents was a general response that they had 'looked into exporting' which was cited by 4% of all businesses which recognised the campaign.

Among campaign recognisers there were no significant differences in actions reported by the exporting segments (though differences may be masked by the small sample sizes).

The level of reported action among recognisers is lower than at the equivalent question for the *Business is GREAT* campaign at this stage (April 2014), when 22% of SME who recognised the campaign said they had taken some action.

**Figure 8.4: Actions taken or considered as a result of the campaign (campaign recognisers)**


Source : AD13 – As a result of seeing or hearing these adverts what, if anything, have you done or considered doing?

Base : All respondents who recognised any of the ads at Wave 2;

While only ad recognisers were asked about their actions, combining this reported action with the overall level of campaign recognition allows us to produce an estimate of the level of action among *all* businesses. This is likely to be an underestimate, since only eight in ten respondents were able to view the ads during the interview. However, basing this estimate on *all* respondents provides a conservative estimate that can more safely be grossed up to population level.

On this basis it is estimated that 5% of all UK businesses took some action as a result of seeing the campaign, with around 1% claiming to visit the website (the ads' main call to action), as shown in Figure 8.5.

£500k+ SMEs/MSBs who had previous exported (the Sustain and Reassure segments) were more likely to report taking some action (7%) than those in the other exporting segments (3% amongst the Promote and Challenge segments combined).

**Figure 8.5: Actions taken or considered as a result of the campaign (all respondents)**

%

**£500k+ SMEs/MSBs only**


Source : AD13 – As a result of seeing or hearing these adverts what, if anything, have you done or considered doing?  
 Base : All respondents at Wave 2;

This is the same level of action as that seen for the *Business is GREAT* campaign at this stage (April 2014) among all SME, with the higher level of reported action among ad recognisers for *Business is GREAT* cancelled out by the lower level of recognition for this earlier campaign.

Assuming a population of 2,449,000 (see Chapter 3) UK registered businesses, this equates to around 110,000 UK businesses taking some action.<sup>22</sup> Taking into account the confidence interval for the estimated level of action, the true figure is likely to be somewhere between 60,000 and 164,000. As previously stated, this may be a slight underestimate since not all respondents were able to view the ads during the interview.

<sup>22</sup> The figure of 110,000 was calculated using the unrounded proportion of businesses taking action (4.57%).

#### 8.4 *Reported campaign impact on recent or planned changes in exporting behaviour*

Any UK businesses that had reported starting to export since November 2015 or who were thinking about starting to export in the next 18 months, and who recognised the ads were asked if the campaign had had any influence on their behaviour or plans. It is not possible to explore this data in any detail since only 13 respondents had started exporting recently and had seen the ads, and a further 13 were thinking about starting to export in the next 18 months and had seen the ads.

None of those who had started exporting recently said their decision was a direct result of the *Exporting is GREAT* campaign. Two of those who were thinking about exporting soon said the campaign had influenced them, but that the campaign was at most 50% responsible for their decision, with all of them already thinking about exporting before seeing the campaign. As highlighted throughout the report, the journey towards exporting tends to be relatively lengthy and, as such, it is not surprising to find such low levels at this point in the campaign.

#### 8.5 *Potential policy and campaign implications*

The *Exporting is GREAT* campaign has already succeeded in prompting a significant number of businesses to take action. However, it does not yet appear to have had a direct impact on the number of businesses which have started to export. At this stage, this is likely to be at least partly a function of the relatively long lead times between companies starting to consider exporting and actually going on to do so. However, the fact that companies that already had experience of exporting were more likely to have been spurred to action than those in the Promote/Challenge segments highlights the challenges of cutting through to totally new exporters. As such, future waves of the survey will be valuable in determining the longer term campaign impacts.

More immediately, as discussed throughout the report, there are a number of other messages which the campaign could potentially communicate on (particularly with a view to addressing perceived barriers and highlighting that support is available). It would be worth considering these with a view to successfully building on the early campaign impacts.

## Appendix A Wave 1 (pre-wave) questionnaire

### Q1 : INTRO : Introduction

Single coded

Good morning, my name is .....calling from TNS BMRB, an independent research agency. We are conducting some research for the Department for Business, Innovation and Skills (BIS).

**ASK TO SPEAK TO OWNER/PROPRIETOR/MD/OTHER SENIOR DECISION MAKER WHO IS BEST QUALIFIED TO TALK ABOUT THE COMPANY'S BUSINESS - NOT HR OR FACILITIES  
REPEAT INTRODUCTION IF NECESSARY**

Good morning, my name is .....calling from TNS BMRB, an independent research agency. We are conducting some research for the Department for Business, Innovation and Skills (BIS).

The Department for Business, Innovation and Skills covers many policies, one of which is to support businesses in the UK. Your contribution with this research will help to shape some of their policies.

Can I confirm that you are one of the people best qualified to talk about your business?

INTERVIEWER NOTE: IF KNOW ALREADY THAT YOU ARE TALKING TO THE CORRECT PERSON CODE YES. REFERRALS CAN BE TAKEN TO ANY UK SITE WHEN THE CONTACT FEELS THAT THERE IS SOMEONE IN THE COMPANY WHO IS BETTER PLACED TO ANSWER QUESTIONS ON THE COMPANY'S BUSINESS ACTIVITY.

- 1  Yes
- 2  No – take referral and being transferred
- 3  No - take referral and arrange call back
- 4  No – refused referral

**Q2 : INTRO2 : Survey assent****Single coded**

The survey should take around 12 minutes. Would you be able to help us with this survey?

**ADD IF NECESSARY:**

- Your co-operation will ensure that the views expressed are representative of all businesses
- All information collected will be treated in the strictest confidence. Responses will not be attributed to any individual or company. Results will be reported in the form of aggregated statistics.
  - We work strictly within the Market Research Society Code of Conduct
- Businesses have been randomly chosen from the Government's Inter-Departmental Business Register

- 1  Yes, continue  
2  No  
 **SCREEN OUT**

**Q3 : NAME : Respondent's name****Open**

Can I please take your name?

98  Refused

*\*Exclusive \*Position fixed*



**Q4 : JOBT : Respondent's job title**

Open

And can I take your job title?

98  Refused*\*Exclusive \*Position fixed***Q53 : TURNCHK : Checking turnover**

Single coded

And to understand the size of your business, please can you tell me if your approximate turnover in the last 12 months was under £500,000, between £500,000 and £25 million or above £25 million?

AN ESTIMATE IS FINE

- 1  Under £500,000
- 2  Between £500,000 and £25 million
- 3  Above £25 million
- 98  Don't know
- SCREEN OUT**
- 99  Refused
- SCREEN OUT**

**Q47 : NUMEMPEE : Number of employees**

Numeric

**Max 99999**

Approximately, how many employees are currently on your payroll in the UK, excluding owners and partners, across all sites?

- INCLUDE FULL AND PART TIME
- INCLUDE TEMPORARIES/CASUALS, BUT NOT AGENCY STAFF
- EXCLUDE SELF-EMPLOYED
- EXCLUDE OWNERS/PARTNERS, BUT OTHER DIRECTORS COUNT AS EMPLOYEES

IF THEY DON'T KNOW ASK THEM TO GIVE AN ESTIMATE

Scripter notes: Code into bands for quotas...

0-9

10-99

100-249

250 or more

**B1 : Background****Begin block**

**Q5 : ACTIVITY. : Principal activity of organisation****Open**

What is the principal activity of your organisation?

ENSURE YOU UNDERSTAND NATURE OF BUSINESS, USING THE FOLLOWING PROBES AS NEEDED

- What is the main product or service of this organisation?
- What exactly is made or done at this organisation?
- What material or machinery does that involve using?

**Q6 : LOCALE. : Where customers are****Multi coded**

Would you say that your current customers are mainly based.....?

READ OUT. MC.

- 1  Locally, e.g. within 30 miles of your main site
- 2  Across your region
- 3  Nationally
- 4  Internationally
- 5  None of these
- 6  Don't know

*\*Exclusive*

*\*Exclusive*

**Q7 : SITES. : Number of sites****Numeric****Min 1 | Max 99**

How many sites in the UK does your business operate from, including your head office?

Scripter notes: Add Refused code

**Q8 : BACKG : Background of respondent****Single coded**

Which of these describes your background when you joined or set up the business?

READ OUT

- 1  Not working
- 2  Self employed
- 3  Redundant / lost job
- 4  Working in different field in a business with less than 250 employees
- 5  Working in similar field in a business with less than 250 employees
- 6  Running another business
- 7  Executive in large UK corporate
- 8  Executive in large multi-national
- 9  [DON'T READ OUT] Other (write in)

*\*Open*

**B1 : Background****End block**

**B2 : ATTITUDES TO BUSINESS, GROWTH AND RISK****Begin block****Q9 : WLB : Work life balance****Single coded**

Which of these come closest to your own thinking?

READ OUT

**Rotated**

- 1  A good work / life balance is the priority for me
- 2  The business is important but I don't let it dominate my life
- 3  I'm very driven; the business dominates my life
- 98  Unable to answer



**Q11 : GROWATT : Attitude to growth****Single coded**

Which of these best describes your thinking on growth?

READ OUT

**Rotated**

- 1  To build a substantial business we have to go for rapid growth
- 2  We're aiming for steady sustainable growth rather than rapid growth
- 3  It's about consolidating what we have rather than growing
- 4  Not interested in the business getting any bigger
- 5  Growing the business will bring more risks than benefits

**Q12 : INNOV : New products or services****Single coded**

Thinking about innovation within your business i.e. new products and processes, have you introduced new or significantly improved products or services in the past twelve months?

- 1  Yes
- 2  No
- 98  Don't know

**Q13 : PLAN\_GROW : Plans to grow****Single coded**

Over the next two to three years, do you aim to grow your business?

- 1  Yes
- 2  No
- 98  Don't know

**B2 : ATTITUDES TO BUSINESS, GROWTH AND RISK****End block****B3 : EXPORT****Begin block****T1 : EXPT : Intro to export section****Text**

I'd now like to ask you a few questions about export activity. By this I mean any goods or services sold by a UK company to an individual or organisation based outside of the UK. This includes transactions made with any branch or subsidiary that is located outside of the UK





**Q15 : EXP : Exporting status**

Single coded

Thinking now about exporting or selling your products/services overseas, would you say that...

READ OUT. SC.

- 1  Our products / services not suitable for export
- 2  We've never considered exporting and wouldn't want to
- 3  We've considered / tried selling to international customers but it isn't right for us
- 4  We'd be interested in exporting but wouldn't know how to start
- 5  We're actively exploring the potential for exporting to new markets
- 6  We've started to sell to international customers and are planning to increase exports
- 7  Exports and international business is a big and growing part of our business
- 8  [DON'T READ OUT] Other (write in) \*Open

ASK ONLY IF Q15 : EXP=1,2,3,4,5

**Q16 : EXP\_EVER\_A : Whether ever exported**

Single coded

Have you ever exported any products or services outside of the UK? (TEXT SUB IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). IF YES: what would you say is the frequency of those sales?

- 1  Never had overseas sales
- 2  Overseas sales every year
- 3  Overseas sales every other year
- 4  Overseas sales less regularly than every other year
- 98  Don't know

Scripter notes: Text sub if sample tagged as in NI

ASK ONLY IF Q15 : EXP=6,7

**Q17 : EXP\_EVER\_B : Frequency of exporting**

Single coded

What would you say is your frequency of exporting products or services outside of the UK? (TEXT ADDITION IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland)?

- 2  Overseas sales every year
- 3  Overseas sales every other year
- 4  Overseas sales less regularly than every other year
- 98  Don't know

Scripter notes: Sample tagged in NI to get text addition

ASK ONLY IF Q15 : EXP=1,2,3

**Q18 : EXP\_POSSIBLE : Whether exporting possible**

Single coded

Which of these best describes your business?

READ OUT

- 1  My products or services would never be suitable for export
- 2  It would be possible to develop my products or services for export

ASK ONLY IF Q18 : EXP\_POSSIBLE=1

**Q19 : EXP\_UNSUIT : Why unsuitable for exporting**

Multi coded

Why do you say your product or service is not suitable for export?

DO NOT READ OUT. MC.

- 1  It's only me / service is only provided by me / one man band
- 2  It can only be me / people buy my expertise
- 3  It's just a one-off (e.g. a single restaurant)
- 4  It's a local service / business only
- 5  My product / service is not transportable
- 6  My product / service is not unique / special enough to export
- 7  I don't believe people overseas would want my product / service more than what is already there
- 8  I can't make /supply enough
- 9  Other (write in) \*Open

ASK ONLY IF Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q20 : EXP\_SERV : Exporting services****Single coded**

In the past 12 months did your business export any SERVICES outside of the UK? This could include commissions, royalties and licences (ADD IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). This does not include exports of goods.

- 1  Yes
- 2  No
- 97  Don't know

Scripter notes: Text addition if in NI.

ASK ONLY IF Q20 : EXP\_SERV=1

**Q21 : EXP\_TURN\_SERV : Percentage of turnover accounted for by service exports****Numeric****Max 100**

Approximately what percentage of your turnover in the last 12 months was accounted for by SERVICE exports?

Scripter notes: Add DK and Refused

**Q22 : EXP\_TURN\_SERV\_EST : Estimate percentage of turnover - service exports**

Single coded

Would you say it was....?

READ OUT

- 1  Up to 5% of turnover
- 2  Up to 10%
- 3  Up to 25%
- 4  Up to 50%
- 5  Up to 75%
- 6  Up to 90%
- 7  More than 90%
- 98  Don't know

Scripter notes: Filter - if DK or Refused at EXP\_TURN\_SERV

ASK ONLY IF Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q23 : EXP\_GOODS : Exporting goods**

Single coded

In the past 12 months did your business export any GOODS outside of the UK? This could include commissions, royalties and licences (ADD IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). This does not include exports of services.

- 1  Yes
- 2  No
- 97  Don't know

Scripter notes: Text addition if in NI

ASK ONLY IF Q23 : EXP\_GOODS=1

**Q24 : EXP\_TURN\_GOODS : Percentage of turnover accounted for by goods exports**

Numeric

**Max 100**

Approximately what percentage of your turnover in the last 12 months was accounted for by PRODUCT exports?

Scripter notes: Add DK and Refused

**Q25 : EXP\_TURN\_GOODS\_EST : Estimate percentage of turnover - product exports**

Single coded

Would you say it was....?

READ OUT

- 1  Up to 5% of turnover
- 2  Up to 10%
- 3  Up to 25%
- 4  Up to 50%
- 5  Up to 75%
- 6  Up to 90%
- 7  More than 90%
- 98  Don't know

Scripter notes: If EXP\_TURN\_GOODS is DK or refused



ASK ONLY IF Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q26 : EXP\_YEARS : How many years exporting****Single coded**

How many years has your business been selling goods and /or services or licensing its products overseas?

Prompt if necessary

- 1  As long as has been trading
- 2  Less than one year
- 3  1 year
- 4  2 years
- 5  3 years
- 6  4 years
- 7  5 years
- 8  6-10 years
- 9  11-20 years
- 10  More than 20 years
- 98  Don't know

ASK ONLY IF Q15 : EXP=4,5 and not Q16 : EXP\_EVER\_A=2 and not Q17 : EXP\_EVER\_B=2

**Q27 : EXPFUT : Exporting plans****Single coded**

Do you have plans to start exporting or licensing your goods or services outside the UK? If yes: do you think this will be in the next 12 months or further in the future?

- 1  Yes - next 12 months
- 2  Yes - further in the future
- 3  No
- 98  Don't know

ASK ONLY IF Q27 : EXPFUT=1,2

**Q28 : EXPINSPIRE : What has encouraged to consider exporting**

Multi coded

Who or what is it that has encouraged you to consider exporting?

DO NOT READ OUT. MC.

- 1  Business / professional contacts
- 2  Financial advisor / accountant / bank
- 3  Family and friends
- 4  Articles/information I saw or read (PROBE FOR SOURCE)
- 5  Advertisements I saw or read (PROBE FOR SOURCE)
- 6  Exporting is GREAT
- 7  UKTI
- 8  Other Government body
- 9  Nothing/ no one in particular – just believe there is potential/ we are successful domestically
- 10  Nothing / no one in particular – just seems like a good time / economy is sound
- 11  Other (specify)

*\*Open*

ASK ONLY IF not Q18 : EXP\_POSSIBLE=1

**Q29 : EXPN : Barriers to exporting**

Multi coded

What are the barriers that prevent your business exporting or if already exporting, what have been the key barriers you had to overcome?

DO NOT READ OUT. MC.

- 1  Do not have a product or service suitable for exporting
- 2  Not part of business plan
- 3  Have sufficient business in the UK already
- 4  Lack of management time to pursue opportunities / do business there
  
- 5  Little knowledge of how to export
- 6  Difficulty identifying opportunities/obtaining information about opportunities
- 7  Difficulty finding overseas customers / establishing a dialogue with prospective customers
- 8  Identifying who to make contact with in the first instance or finding a suitable partner
- 9  Building relationships with key influencers / decision makers
  
- 10  Concerns about paperwork (general)
- 11  Dealing with legal or tax regulation and standards
- 12  Dealing with customs procedures and paperwork
  
- 13  Too costly
- 14  Concern about the level of return on the investment
  
- 15  Fear of payment problems /not being paid fully or on time/enforcing contracts
- 16  Too risky
- 17  Protecting your intellectual property / intellectual property theft
  
- 18  Customers prefer to do business with firms from their own country
- 19  Cultural differences
- 20  Language barriers





internationally						
There would not be enough demand for my business overseas to make it worthwhile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exporting would give my business the opportunity for higher or faster growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q32 : EXPAD\_A : Whether sought external advice****Single coded**

Have you ever sought external business support or advice?

- 1  Yes
- 2  No
- 99  Can't remember

**ASK ONLY IF not Q18 : EXP\_POSSIBLE=1****Q33 : EXPAD\_B : Whether sought exporting advice****Single coded**

Have you ever sought advice and support about exporting?

- 1  Yes
- 2  No
- 99  Can't remember

ASK ONLY IF not Q18 : EXP\_POSSIBLE=1

**Q34 : ADV\_EXP : How would get exporting advice**

**Multi coded**

What would you do if you wanted support, advice or information about exporting ([IF EXPAD\_B = 1} again)?

DO NOT READ OUT. MC

- |    |                          |  |                   |
|----|--------------------------|--|-------------------|
| 1  | <input type="checkbox"/> | Talk to my accountant  |                   |
| 2  | <input type="checkbox"/> | Talk to my bank  |                   |
| 3  | <input type="checkbox"/> | Talk to business networks/trade associations                         |                   |
| 4  | <input type="checkbox"/> | Talk to consultant/general business adviser                          |                   |
| 5  | <input type="checkbox"/> | Talk to Chamber of Commerce  |                   |
| 6  | <input type="checkbox"/> | Talk to UK Trade and Investment (UKTI)                               |                   |
| 7  | <input type="checkbox"/> | Would search online / google it                                      |                   |
| 8  | <input type="checkbox"/> | Talk to friends or colleagues about their experience/recommendations |                   |
| 9  | <input type="checkbox"/> | Other (WRITE IN)   | <i>*Open</i>      |
| 98 | <input type="radio"/>    | Don't know   | <i>*Exclusive</i> |
| 10 | <input type="radio"/>    | I wouldn't want to find out more about exporting                     | <i>*Exclusive</i> |

Scripter notes: Add "again" at end of question only for people who at previous question, said that they have sought advice.

ASK ONLY IF not Q34 : ADV\_EXP=10 and not Q18 : EXP\_POSSIBLE=1

**Q35 : WEBEXP : Knowledge of exporting websites**

Multi coded

And which websites are you aware of, either government-sponsored or non-government, that provide support, advice or information to businesses thinking about exporting? PROBE: Which others can you think of?

[DO NOT READ OUT] PROBE FOR EXACT NAMES.

- 1  UK Trade and Investment (UKTI)
- 2  Department for Business, Innovation and Skills (BIS)
- 3  HMRC
- 4  .gov.uk website
- 5  Exporting is GREAT website
- 6  Federation of Small Businesses
- 7  Chambers of Commerce
- 8  Moneysupermarket.com
- 9  UK Export Finance (UKEF)
- 10  UK banks (e.g. Barclays, HSBC, Lloyds TSB, RBS, Sanatander)
- 11  LinkedIn
- 12  Facebook
- 13  Twitter
- 14  Blogs (WRITE IN)
- 15  Other (WRITE IN)
- 16  Don't know
- 17  I wouldn't want to find out more about exporting

*\*Open**\*Exclusive**\*Exclusive*

Scripter notes: Prompt a "Write in" field for code Blogs



ASK ONLY IF not Q34 : ADV\_EXP=10 and not Q18 : EXP\_POSSIBLE=1

**Q36 : ADVTYPE : Useful advice**

**Multi coded**

Which of these kinds of advice or support in relation to export / selling your products/services overseas would you find useful in the next two to three years:

READ OUT. MC.

**Rotated**

- 1  Market intelligence
- 2  Development and distribution partners
- 3  International supply chains
- 4  Potential client contacts
- 5  Language and cultural issues
- 6  Regulation and customs issues
- 7  Networking and show-casing events
- 8  Attending international trade fairs
- 9  One-on-one advisor support
- 10  Not interested in export
- 98  None of these

*\*Exclusive \*Position fixed*

*\*Exclusive \*Position fixed*

ASK ONLY IF not Q34 : ADV\_EXP=10 and not Q18 : EXP\_POSSIBLE=1

**Q37 : ADVGOVT : Interest in support**

Single coded

How interested would your business be in information and business support services that can assist you with exporting?

READ OUT

- 1  Very interested
- 2  Quite interested
- 3  Not interested

ASK ONLY IF Q37 : ADVGOVT=1,2

**Q38 : ADVGOVTb : Interest in advice from gvt**

Single coded

Would you prefer to receive those services from...

READ OUT

**Rotated**

- 1  Government
- 2  Private industry
- 3  Government and private industry

**B3 : EXPORT****End block**

**B4 : ADVERTISING MEASURES****Begin block****Q39 : AD\_AWARE : Awareness of advertising****Single coded**

In the last couple of months, have you seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting recently?

- 1  Yes
- 2  No
- 3  Not sure

ASK ONLY IF Q39 : AD\_AWARE=1

**Q40 : AD\_SOURCE : Source of advertising**

Multi coded

Where did you see or hear this information or advertising?

DO NOT READ OUT. MC.

- 1  TV programme or news
- 2  TV advertising
- 3  Radio programme or news
- 4  Radio advertising
- 5  National newspaper article
- 6  National newspaper advertising
- 7  Local newspaper article
- 8  Local newspaper advertising
- 9  Magazine article
- 10  Magazine advertising
- 11  Trade press article
- 12  Trade press advertising
- 13  On LinkedIn
- 14  On Twitter
- 15  Facebook
- 16  Other social networking sites
- 17  On Exporting is GREAT website
- 18  On another website (WRITE IN WHICH) \*Open
- 19  Advertising on the internet
- 20  Marketing email
- 21  Marketing telephone call
- 22  At an event
- 23  Poster/billboard
- 24  Accountant / business advisor
- 25  Word of mouth
- 26  Other, namely... \*Open \*Position fixed
- 98  Don't know \*Exclusive \*Position fixed

**B4 : ADVERTISING MEASURES****End block****B5 : FIRMOGRAPHICS****Begin block****T3 : T3 :****Text**

I would just like to ask a few more questions in order to classify your answers.

**Q41 : SKILL. : Business capabilities****Multi coded**

Which of these does your business have?

READ OUT. MC.

**Rotated**

- 1  A written business plan
  - 2  A finance team
  - 3  UK based employees engaged in Research and Development or new product or service development activity
  - 4  Applied for or obtained any patents, trademarks or other legal protection for any of your products or services
  - 5  People with foreign language skills
  - 6  Owner / manager born overseas
  - 7  Connections with other businesses
  - 8  Owner / manager with a degree
  - 9  An overseas target
  - 10  None of these
- \*Exclusive*

Scripter notes: Only ask code 9 IF EXP\_EVER\_A or B = 2/3 OR EXPFUT = 1

**Q52 : CONN : Connections**

Single coded

Thinking back to when you, or other directors/owners, set up or joined the business, on a scale of 1 to 5 how strong were your/their connections with others in the industry?

1 is no connections, 5 is very strong connections

- 1  1
- 2  2
- 3  3
- 4  4
- 5  5

**Q42 : LEGSTAT : Business status**

Single coded

And is the business...?

READ OUT

- 1  Listed company
- 2  Owned by founder(s) who work in the business
- 3  Owned by directors / partners (not a family business)
- 4  Family business owned by family members
- 5  Owned by private shareholders who do not work in the business
- 6  Owned/part owned by another company

**Q43 : TURN : Turnover (exact)**

Numeric

**Max 99999999**

Can you please tell me the approximate turnover of your business in the past 12 months across all your UK sites?

RECORD EXACT FIGURE BELOW, IF NOT SURE, ASK FOR AN APPROXIMATE FIGURE. ALLOWED RANGE  
£0-£99,999,999

Scripter notes: Add Don't know and Refused

**Q54 : TURNVER : Verification of turnover**

Single coded

You entered [SUB: number entered at TURN in format £nn,nnn,nnn].

Is this correct?

DO NOT READ OUT - INTERVIEWER TO RESPOND

- 1  Yes  
2  No (you will be routed back to re-enter)

Scripter notes: If no, route back to TURN

Only ask when TURN is filled in - if DK or Refused, do not ask

**Q44 : TURNNET : Turnover (bands)**

Single coded

Which of these ranges does your turnover fall into?

READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY

- 1  £0 - £150k
- 2  £150k - £300k
- 3  £300k - £500k
- 9  £500k - £600k
- 4  £600k - £2m
- 5  £2m - £25m
- 6  £25m+
- 98  Don't know
- 99  Refused

Scripter notes: If DK or refused at previous question

**Q45 : TURNIN : Turnover change**

Single coded

Compared to the previous 12 months has your turnover in the past 12 months increased, decreased or stayed roughly the same?

- 1  Increased
- 2  Decreased
- 3  Stayed roughly the same
- 98  Don't know
- 99  Refused



**Q46 : TURNNXT : Future turnover**

Single coded

And in the next 12 months do you expect your turnover to increase, decrease or stay roughly the same?

- 1  Increase
- 2  Decrease
- 3  Stay roughly the same
- 98  Don't know
- 99  Refused

**Q48 : SEX : Sex of respondent**

Single coded

DO NOT READ OUT. CODE SEX.

- 1  Male
- 2  Female

**Q49 : RECONTACT : Recontact**

Single coded

The Department for Business Innovation and Skills (BIS) want to carry out a further survey in about a year's time, to see how your business is progressing. Would you be willing to help with that research?

- 1  Yes
- 2  No
- 3  Maybe

**Q50 : DATA : Data linkage****Single coded**

Would it be possible for BIS to link your responses to other information that you have provided previously to the Government? By this data linkage, we can reduce the burden of our surveys on your business and can improve the evidence that we use.

ADD IF NECESSARY

Data will only be used to inform research on businesses in aggregate - we will never release information that identifies any individual business - and your survey responses remain strictly confidential. Do you give your consent for us to do this?

- 1  Yes
- 2  No

**B5 : FIRMOGRAPHICS****End block****T4 : T4 :****Text**

On behalf of the Department for Business, Innovation and Skills, thank you very much for your time.

## Appendix B Wave 2 (post-wave) questionnaire

### Q1 : INTRO : Introduction

Single coded

Good morning, my name is .....calling from TNS BMRB, an independent research agency. We are conducting some research for the Department for Business, Innovation and Skills.

**ASK TO SPEAK TO OWNER/PROPRIETOR/MD/OTHER SENIOR DECISION MAKER WHO IS BEST QUALIFIED TO TALK ABOUT THE COMPANY'S BUSINESS - NOT HR OR FACILITIES  
REPEAT INTRODUCTION IF NECESSARY**

Good morning, my name is .....calling from TNS BMRB, an independent research agency. We are conducting some research for the Department for Business, Innovation and Skills.

The Department for Business, Innovation and Skills covers many policies, one of which is to support businesses in the UK. Your contribution with this research will help to shape some of their policies.

Can I confirm that you are one of the people best qualified to talk about your business?

INTERVIEWER NOTE: IF KNOW ALREADY THAT YOU ARE TALKING TO THE CORRECT PERSON CODE YES. REFERRALS CAN BE TAKEN TO ANY UK SITE WHEN THE CONTACT FEELS THAT THERE IS SOMEONE IN THE COMPANY WHO IS BETTER PLACED TO ANSWER QUESTIONS ON THE COMPANY'S BUSINESS ACTIVITY.

- 1  Yes
- 2  No – take referral and being transferred
- 3  No - take referral and arrange call back
- 4  No – refused referral


**Q2 : INTRO2 : Survey assent**

Single coded

The survey should take around 17 minutes. Would you be able to help us with this survey?

**ADD IF NECESSARY:**

- Your co-operation will ensure that the views expressed are representative of all businesses
- All information collected will be treated in the strictest confidence. Responses will not be attributed to any individual or company. Results will be reported in the form of aggregated statistics.
  - We work strictly within the Market Research Society Code of Conduct
- Businesses have been randomly chosen from the Government's Inter-Departmental Business Register

- 1  Yes, continue  
2  No  
 **SCREEN OUT**

**Q3 : NAME : Respondent's name**

Open

Can I please take your name?

98  Refused*\*Exclusive \*Position fixed*

**Q4 : JOBT : Respondent's job title**

Open

And can I take your job title?

98  Refused*\*Exclusive \*Position fixed***QN1 : Do you have access to the internet right now?**

IF NECESSARY: This could be on a computer, tablet or a smartphone as long as it isn't the phone you're using to speak to me.

IF NECESSARY: As part of this survey, we would like you to look at some images on a website.

- 1 Yes - continue
- 2 No, but could get access at another time – make appointment to call back
- 3 Never have internet access – continue

SCRIPTER – WE WILL NEED TO INCLUDE RESPONSES TO THIS QUESTION IN THE FIELDWORK REPORTS

**Q53 : TURNCHK : Checking turnover****Single coded**

And to understand the size of your business, please can you tell me if your approximate turnover in the last 12 months was under £500,000, between £500,000 and £25 million or above £25 million?

AN ESTIMATE IS FINE

- 1  Under £500,000
- 2  Between £500,000 and £25 million
- 3  Above £25 million
- 98  Don't know
- SCREEN OUT**
- 99  Refused
- SCREEN OUT**

**Q47 : NUMEMPEE : Number of employees**

Numeric

**Max 99999**

Approximately, how many employees are currently on your payroll in the UK, excluding owners and partners, across all sites?

- INCLUDE FULL AND PART TIME
- INCLUDE TEMPORARIES/CASUALS, BUT NOT AGENCY STAFF
- EXCLUDE SELF-EMPLOYED
- EXCLUDE OWNERS/PARTNERS, BUT OTHER DIRECTORS COUNT AS EMPLOYEES

IF THEY DON'T KNOW ASK THEM TO GIVE AN ESTIMATE

Scripter notes: Code into bands for quotas...

0-9  
10-99  
100-249  
250 or more

**B1 : Background****Begin block**

**Q5 : ACTIVITY. : Principal activity of organisation****Open**

What is the principal activity of your organisation?

ENSURE YOU UNDERSTAND NATURE OF BUSINESS, USING THE FOLLOWING PROBES AS NEEDED

- What is the main product or service of this organisation?
- What exactly is made or done at this organisation?
- What material or machinery does that involve using?

**Q6 : LOCALE. : Where customers are****Multi coded**

Would you say that your **current** customers are mainly based.....?

READ OUT. MC.

- 1  Locally, e.g. within 30 miles of your main site
- 2  Across your region
- 3  Nationally
- 4  Internationally
- 5  None of these
- 6  Don't know

*\*Exclusive*

*\*Exclusive*



**Q7 : SITES. : Number of sites****Numeric****Min 1 | Max 99**

How many sites in the UK does your business operate from, including your head office?

Scripter notes: Add Refused code

**Q8 : BACKG : Background of respondent****Single coded**

Which of these describes your background when you joined or set up the business?

READ OUT

- 1  Not working
- 2  Self employed
- 3  Redundant / lost job
- 4  Working in different field in a business with less than 250 employees
- 5  Working in similar field in a business with less than 250 employees
- 6  Running another business
- 7  Executive in large UK corporate
- 8  Executive in large multi-national
- 9  **[DON'T READ OUT]** Other (write in)

*\*Open*

**B1 : Background****End block**

**B2 : ATTITUDES TO BUSINESS, GROWTH AND RISK****Begin block****Q9 : WLB : Work life balance****Single coded**

Which of these come closest to your own thinking?

READ OUT

**Rotated**

- 1  A good work / life balance is the priority for me
- 2  The business is important but I don't let it dominate my life
- 3  I'm very driven; the business dominates my life
- 98  Unable to answer

**Q11 : GROWATT : Attitude to growth****Single coded**

Which of these best describes your thinking on growth?

READ OUT

**Rotated**

- 1  To build a substantial business we have to go for rapid growth
- 2  We're aiming for steady sustainable growth rather than rapid growth
- 3  It's about consolidating what we have rather than growing
- 4  Not interested in the business getting any bigger
- 5  Growing the business will bring more risks than benefits

**Q12 : INNOV : New products or services**

Single coded

Thinking about innovation within your business i.e. new products and processes, have you introduced new or significantly improved products or services in the past twelve months?

- 1  Yes
- 2  No
- 98  Don't know

**Q13 : PLAN\_GROW : Plans to grow**

Single coded

Over the next two to three years, do you aim to grow your business?

- 1  Yes
- 2  No
- 98  Don't know

**B2 : ATTITUDES TO BUSINESS, GROWTH AND RISK**

End block

**B3 : EXPORT**

Begin block

**T1 : EXPT : Intro to export section**

Text

I'd now like to ask you a few questions about export activity. By this I mean any goods or services sold by a UK company to an individual or organisation based outside of the UK. This includes transactions made with any branch or subsidiary that is located outside of the UK



**Q15 : EXP : Exporting status**

Single coded

Thinking now about exporting or selling your products/services overseas, would you say that...

READ OUT. SC.

- 1  Our products / services not suitable for export
- 2  We've never considered exporting and wouldn't want to
- 3  We've considered / tried selling to international customers but it isn't right for us
- 4  We'd be interested in exporting but wouldn't know how to start
- 5  We're actively exploring the potential for exporting to new markets
- 6  We've started to sell to international customers and are planning to increase exports
- 7  Exports and international business is a big and growing part of our business
- 8  **[DON'T READ OUT]** Other (write in) \*Open

ASK ONLY IF Q15 : EXP=1,2,3,4,5

**Q16 : EXP\_EVER\_A : Whether ever exported**

Single coded

Have you ever exported any products or services outside of the UK? (TEXT SUB IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). IF YES: what would you say is the frequency of those sales?

- 1  Never had overseas sales
- 2  Overseas sales every year
- 3  Overseas sales every other year
- 4  Overseas sales less regularly than every other year
- 98  Don't know

Scripter notes: Text sub if sample tagged as in NI

ASK ONLY IF Q15 : EXP=6,7

**Q17 : EXP\_EVER\_B : Frequency of exporting**

Single coded

What would you say is your frequency of exporting products or services outside of the UK? (TEXT ADDITION IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland)?

- 2  Overseas sales every year
- 3  Overseas sales every other year
- 4  Overseas sales less regularly than every other year
- 98  Don't know

Scripter notes: Sample tagged in NI to get text addition

ASK ONLY IF Q15 : EXP=1,2,3

**Q18 : EXP\_POSSIBLE : Whether exporting possible**

Single coded

Which of these best describes your business?

READ OUT

- 1  My products or services would never be suitable for export
- 2  It would be possible to develop my products or services for export

ASK ONLY IF Q18 : EXP\_POSSIBLE=1

**Q19 : EXP\_UNSUIT : Why unsuitable for exporting**

Multi coded

Why do you say your product or service is not suitable for export?

DO NOT READ OUT. MC.

- 1  It's only me / service is only provided by me / one man band
- 2  It can only be me / people buy my expertise
- 3  It's just a one-off (e.g. a single restaurant)
- 4  It's a local service / business only
- 5  My product / service is not transportable
- 6  My product / service is not unique / special enough to export
- 7  I don't believe people overseas would want my product / service more than what is already there
- 8  I can't make /supply enough
- 9  Other (write in) \*Open

ASK ONLY IF Q15 = 6, 7 or Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q20 : EXP\_SERV : Exporting services****Single coded**

In the past 12 months did your business export any SERVICES outside of the UK? This could include commissions, royalties and licences (ADD IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). This does not include exports of goods.

- 1  Yes
- 2  No
- 97  Don't know

Scripter notes: Text addition if in NI.

ASK ONLY IF Q15 = 6, 7 or Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q20A** And did your business export any SERVICES between November 8<sup>th</sup> 2014 and November 7<sup>th</sup> 2015?

IF NECESSARY: This would be exports outside the UK, including sales to the Republic of Ireland

IF NECESSARY: This could include commissions, royalties and licences. This does not include exports of goods.

- 1 Yes
- 2 No
- 3 Don't know



**ASK IF HAVE EXPORTED SERVICES IN PAST 12 MONTHS (Q20 = 1)**

**Q20B** And did your business export any SERVICES between the 8<sup>th</sup> of November **2015** and now?

IF NECESSARY: This would be exports outside the UK, including sales to the Republic of Ireland

IF NECESSARY: This could include commissions, royalties and licences. This does not include exports of goods.

- 1 Yes
- 2 No
- 3 Don't know

ASK ONLY IF Q15 = 6, 7 or Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q23 : EXP\_GOODS : Exporting goods**

Single coded

In the past 12 months did your business export any GOODS outside of the UK? This could include commissions, royalties and licences (ADD IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). This does not include exports of services.

- 1  Yes
- 2  No
- 97  Don't know

Scripter notes: Text addition if in NI

ASK ONLY IF Q15 = 6, 7 or Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q23A** And did your business export any GOODS between November 8<sup>th</sup> 2014 and November 7<sup>th</sup> 2015?

IF NECESSARY: This would be exports outside the UK, including sales to the Republic of Ireland

IF NECESSARY: This could include commissions, royalties and licences. This does not include exports of goods.

- 1 Yes
- 2 No
- 3 Don't know

ASK IF HAVE EXPORTED GOODS IN PAST 12 MONTHS (Q23 = 1)

**Q23B** And did your business export any GOODS between the 8<sup>th</sup> of November **2015** and now?

IF NECESSARY: This would be exports outside the UK, including sales to the Republic of Ireland

IF NECESSARY: This could include commissions, royalties and licences. This does not include exports of goods.

- 1 Yes
- 2 No
- 3 Don't know

ASK ONLY IF Q16 : EXP\_EVER\_A=2,3,4,98 or Q17 : EXP\_EVER\_B=2,3,4,98

**Q26 : EXP\_YEARS : How many years exporting**

**Single coded**

How many years has your business been selling goods and /or services or licensing its products overseas?

Prompt if necessary

- 1  As long as has been trading
- 2  Less than one year
- 3  1 year
- 4  2 years
- 5  3 years
- 6  4 years
- 7  5 years
- 8  6-10 years
- 9  11-20 years
- 10  More than 20 years
- 98  Don't know

ASK ONLY IF Q15 : EXP=4,5 and not (Q20A = 1 OR Q20B = 1 or Q23A = 1 OR Q23B = 1))

**Q27 : EXPFUT : Exporting plans**

Single coded

Do you have plans or an active interest in starting to export or license your goods or services outside the UK? If yes: do you think this will be in the next 12 months or further in the future?

IF RESPONDENT SAYS THEY ALREADY DO EXPORT BUT WERE JUST TAKING A BREAK

- 1  Yes - next 12 months
- 2  Yes – further in the future
- 3  No
- 98  Don't know

ASK IF HAVE PLANS/AN ACTIVE INTEREST IN EXPORTING (Q27 = 1 OR 2)

**Q27a** What, if any, of the following have you already done with a view to starting exporting? Have you...

READ OUT. PROMPT WITH ADDITIONAL 'IF NECESSARY' TEXT IF RESPONDENT IS UNCERTAIN

- 1 Done a basic assessment of your company's export potential (IF NECESSARY: e.g. looked at whether the product/service can be exported or gained commitment of Directors/Board)
- 2 Assessed your company's current readiness to export (IF NECESSARY: e.g. looked at staffing/resources costs/sales literature or export pricing)
- 3 Investigated the rules of doing business with a country (IF NECESSARY: e.g. investigated regulation and rules of doing business with the country/tax/distribution and logistics/payment options/representatives/paperwork)
- 4 Researched other aspects of an overseas market (e.g. researched demand, competitors, customers, distribution channels, promotion or visited the country)
- 5 Developed an export business plan (IF NECESSARY: e.g. formally planning financing, drawing up a sales and marketing plan, selecting distribution channels or developing market entry strategies)
- 6 None of these
- 7 Don't know

ASK ONLY IF Q27 : EXPFUT=1,2

**Q28 : EXPINSPIRE : What has encouraged you to consider exporting**

**Multi coded**

Who or what is it that has encouraged you to consider exporting?

DO NOT READ OUT. MC.

- 1  Business / professional contacts
- 2  Financial advisor / accountant / bank
- 3  Family and friends
- 4  Articles/information I saw or read (PROBE FOR SOURCE)
- 5  Advertisements I saw or read (PROBE FOR SOURCE)
- 6  Exporting is GREAT
- 7  UKTI
- 8  Other Government body
- 9  Nothing/ no one in particular – just believe there is potential/ we are successful domestically
- 10  Nothing / no one in particular – just seems like a good time / economy is sound
- 11  Other (specify)

*\*Open*

ASK ONLY IF not Q18 : EXP\_POSSIBLE=1

**Q29 : EXPN : Barriers to exporting**

Multi coded

What are the barriers that prevent your business exporting or if already exporting, what have been the key barriers you had to overcome?

DO NOT READ OUT. MC.

- 1  Do not have a product or service suitable for exporting
- 2  Not part of business plan
- 3  Have sufficient business in the UK already
- 4  Lack of management time to pursue opportunities / do business there
  
- 5  Little knowledge of how to export
- 6  Difficulty identifying opportunities/obtaining information about opportunities
- 7  Difficulty finding overseas customers / establishing a dialogue with prospective customers
- 8  Identifying who to make contact with in the first instance or finding a suitable partner
- 9  Building relationships with key influencers / decision makers
  
- 10  Concerns about paperwork (general)
- 11  Dealing with legal or tax regulation and standards
- 12  Dealing with customs procedures and paperwork
  
- 13  Too costly
- 14  Concern about the level of return on the investment
  
- 15  Fear of payment problems /not being paid fully or on time/enforcing contracts
- 16  Too risky
- 17  Protecting your intellectual property / intellectual property theft
  
- 18  Customers prefer to do business with firms from their own country
- 19  Cultural differences
- 20  Language barriers







internationally						
There would not be enough demand for my business overseas to make it worthwhile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exporting would give my business the opportunity for higher or faster growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q32 : EXPAD\_A : Whether sought external advice****Single coded**

Have you ever sought external business support or advice?

- 1  Yes
- 2  No
- 99  Can't remember

**ASK ONLY IF not Q18 : EXP\_POSSIBLE=1****Q33 : EXPAD\_B : Whether sought exporting advice****Single coded**

Have you ever sought advice and support about exporting?

- 1  Yes
- 2  No
- 99  Can't remember

ASK ONLY IF not Q18 : EXP\_POSSIBLE=1

**Q34 : ADV\_EXP : How would get exporting advice**

**Multi coded**

What would you do if you wanted support, advice or information about exporting ([IF EXPAD\_B = 1} again)?

DO NOT READ OUT. MC

- 1  Talk to my accountant
- 2  Talk to my bank
- 3  Talk to business networks/trade associations
- 4  Talk to consultant/general business adviser
- 5  Talk to Chamber of Commerce
- 6  Talk to UK Trade and Investment (UKTI)
- 7  Would search online / google it
- 8  Talk to friends or colleagues about their experience/recommendations
- 9  Other (WRITE IN) *\*Open*
- 98  Don't know *\*Exclusive*
- 10  I wouldn't want to find out more about exporting *\*Exclusive*

Scripter notes: Add "again" at end of question only for people who at previous question, said that they have sought advice.

ASK ONLY IF not Q34 : ADV\_EXP=10 and not Q18 : EXP\_POSSIBLE=1

**Q35 : WEBEXP : Knowledge of exporting websites**

Multi coded

And which websites are you aware of, either government-sponsored or non-government, that provide support, advice or information to businesses thinking about exporting? PROBE: Which others can you think of?

[DO NOT READ OUT] PROBE FOR EXACT NAMES.

- 1  UK Trade and Investment (UKTI)
- 2  Department for Business, Innovation and Skills (BIS)
- 3  HMRC
- 4  .gov.uk website
- 5  Exporting is GREAT website
- 6  Federation of Small Businesses
- 7  Chambers of Commerce
- 8  Moneysupermarket.com
- 9  UK Export Finance (UKEF)
- 10  UK banks (e.g. Barclays, HSBC, Lloyds TSB, RBS, Sanatander)
- 11  LinkedIn
- 12  Facebook
- 13  Twitter
- 14  Blogs (WRITE IN)
- 15  Other (WRITE IN)
- 16  Don't know
- 17  I wouldn't want to find out more about exporting

*\*Open**\*Exclusive**\*Exclusive*

Scripter notes: Prompt a "Write in" field for code Blogs

ASK ONLY IF not Q34 : ADV\_EXP=10 and not Q18 : EXP\_POSSIBLE=1

**Q36 : ADVTYPE : Useful advice****Multi coded**

Which of these kinds of advice or support in relation to export / selling your products/services overseas would you find useful in the next two to three years:

READ OUT. MC.

**Rotated**

- 1  Market intelligence in terms of demand and competitors
- 2  Help with understanding internal capacity to export e.g. whether product can be exported, extra staff needed etc.
- 3  International supply chains and distribution channels
- 4  Potential customer contacts
- 5  Language and cultural issues
- 6  Regulation and customs issues
- 7  Networking, trade fairs and show-casing events
- 8  Tax implications
- 9  Marketing issues
- 10  Help with developing an export plan e.g. market entry strategy, marketing plan, finance plan
- 11  Financial support to help with the costs of exporting
- 10  Not interested in export *\*Exclusive \*Position fixed*
- 98  None of these *\*Exclusive \*Position fixed*

ASK ONLY IF not Q34 : ADV\_EXP=10 and not Q18 : EXP\_POSSIBLE=1

**Q37 : ADVGOVT : Interest in support**

Single coded

How interested would your business be in information and business support services that can assist you with exporting?

READ OUT

- 1  Very interested
- 2  Quite interested
- 3  Not interested

**B3 : EXPORT**

End block

**B4 : ADVERTISING MEASURES**

Begin block

**Q39 : AD\_AWARE : Awareness of advertising**

Single coded

In the last six months, have you seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting recently?

- 1  Yes
- 2  No
- 3  Not sure

ASK ONLY IF Q39 : AD\_AWARE=1

**Q40 : AD\_SOURCE : Source of advertising**

Multi coded

Where did you see or hear this information or advertising?

DO NOT READ OUT. MC.

- 1  TV programme or news
- 2  TV advertising
- 3  Radio programme or news
- 4  Radio advertising
- 5  National newspaper article
- 6  National newspaper advertising
- 7  Local newspaper article
- 8  Local newspaper advertising
- 9  Magazine article
- 10  Magazine advertising
- 11  Trade press article
- 12  Trade press advertising
- 13  On LinkedIn
- 14  On Twitter
- 15  Facebook
- 16  Other social networking sites
- 17  On Exporting is GREAT website
- 18  On another website (WRITE IN WHICH) \*Open
- 19  Advertising on the internet
- 20  Marketing email
- 21  Marketing telephone call
- 22  At an event
- 23  Poster/billboard
- 24  Accountant / business advisor
- 25  Word of mouth
- 26  Other, namely... \*Open \*Position fixed
- 98  Don't know \*Exclusive \*Position fixed

**ASK IF HAVE SEEN ADS FOR EXPORTING (Q39 = 1)**

**AD3** Please can you describe in detail what you remember about this information or advertising?  
What else?

PROBE FOR DETAIL OTHER THAN THE SOURCE. NOTE DOWN FULL RESPONSE.

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**ASK IF HAVE SEEN ADS FOR EXPORTING (Q39 = 1)**

**AD4** Who do you think was responsible for the information or advertising you remember seeing?

DO NOT PROMPT. MULTICODE OK

1. UK government
2. GREAT
3. Business In You
4. Business Link
5. Capital for Enterprise
6. Federation of Small Businesses
7. Chambers of Commerce
8. HMRC
9. Foreign and Commonwealth Office (FCO)
10. ICAEW (Institute of Chartered Accountants)
11. Moneysupermarket.com
12. UK Trade & Investment (UKTI)
13. UK Export Finance (UKEF)
14. UK banks (e.g. Barclays, HSBC, Lloyds TSB, RBS, Santander)
15. Other (SPECIFY)
16. Can't remember (**FIX AT END; SINGLE CODE**)

**ASK IF HAVE INTERNET ACCESS (QN1 = 1). OTHERS SKIP TO T3**

**AD5** For the next few questions I'd like you to look at some images and video clips on a website. Could you open your browser and type in the following website address? It is [www.bit.ly/exporting10](http://www.bit.ly/exporting10)

INTERVIEWER: DICTATE THE WEBSITE ADDRESS SLOWLY AND CLEARLY AND REPEAT IF NECESSARY, THEN CODE BELOW AS APPROPRIATE.

1. DO NOT READ OUT: Respondent can access website
2. DO NOT READ OUT: Respondent unable to access website [SKIP TO T3]

SCRIPTER: WE WILL NEED DATA FROM THIS QUESTION TO BE INCLUDED IN THE FIELDWORK REPORTS.

**ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)**

**AD6** To start with, please can you click on the picture of the TV advert so that it plays. When it finishes, I'd like you to tell me whether you have seen this advert, or a shorter advert in a similar style, in the past 6 months or so.

IF NECESSARY AT END OF VIDEO CLIP: Had you seen this TV ad, or one in a similar style, in the past 2 months?

Yes – had seen TV ad before	1
No – had not seen TV ad before	2
Respondent could not get TV ad to play	3
Don't know	4

**ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)**

**AD7** Now please click the 'Next' button to move to the next page. This time, please double click on the audio file to hear a radio advert. When it finishes, I'd like you to tell me whether you have heard this advert, or a similar radio advert which focused on a different country, in the past 6 months or so.

IF NECESSARY AT END OF AUDIO CLIP: Had you heard this radio ad, or one in a similar style, in the past 2 months?

Yes – had heard radio ad before	1
No – had not heard radio ad before	2
Respondent could not get radio ad to play	3
Don't know	4



**ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)**

**AD8** Again, please click the 'Next' button to move to the next page. Have you seen any of these adverts, or ones in a similar style, in the past 6 months or so? They would have appeared online or on screens in public places.

**MULTICODE**

Yes – had seen ads online	1
Yes – had seen ads on screens in public places	2
Yes – had seen ads but not sure where	3
No – had not seen online / public screen ads	4
Respondent could not see online / public screen ads onscreen	5
Don't know	6

**ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)**

**AD9** And please click once more to move to the last page. Have you seen this newspaper or magazine advert, or ones in a similar style, in the past 6 months or so?

Yes – had seen print ads	1
No – had not seen print ads	2
Respondent could not see print ads onscreen	3
Don't know	4

**ASK IF RESPONDENT CAN ACCESS WEBSITE AND DID NOT SAY 'COULD NOT SEE ADS ONSCREEN AT ALL OF QUESTIONS AD6-AD9: (AD5 = 1) AND NOT (AD6 = 3 AND AD7 = 3 AND AD8 = 5 AND AD9 = 3)**

**AD10** Thinking about all of the adverts that you've just seen and heard, do these adverts increase your interest in finding out more about exporting?

Yes	1
No	2
Don't know	3

ASK IF ADS DIDN'T INCREASE INTEREST IN FINDING OUT MORE (AD10 = 2 OR 3)

**AD11** Why don't these adverts increase your interest in finding out about exporting?

DO NOT PROMPT

Didn't like the adverts	1
Didn't understand the adverts	2
I already know all I need to know about exporting	3
I don't know enough about exporting to even consider it	4
I am already an exporter	5
I don't think the government would be much help with this	6
My business isn't suitable for exporting	7
It would be too financially risky to start exporting	8
I don't have time to investigate	9
I have not yet looked at my business options/capabilities in terms of exporting	10
It is too difficult to deal with paperwork/regulation/tax	11
I haven't researched other markets yet	12
Other (specify)	13
Don't know	14

ASK IF RESPONDENT CAN ACCESS WEBSITE AND DID NOT SAY 'COULD NOT SEE ADS ONSCREEN AT ALL OF QUESTIONS AD6-AD9: (AD5 = 1) AND NOT (AD6 = 3 AND AD7 = 3 AND AD8 = 5 AND AD9 = 3)

**AD12** As a result of seeing and hearing these adverts, which of the following applies to you?

READ OUT.

You feel much more confident about exporting	1
You feel somewhat more confident about exporting	2
You have the same level of confidence about exporting	3
You feel somewhat less confident about exporting	4
You feel much less confident about exporting	5
Don't know	6

ASK IF RECOGNISED ANY EXPORTING IS GREAT AD (AD6 = 1 OR AD7 = 1 OR AD8 = 1-3 OR AD9 = 1)

**AD13** As a result of seeing or hearing these adverts what, if anything, have you done or considered doing? DO NOT PROMPT. CODE ALL THAT APPLY. PROBE: Anything else?

INTERVIEWER NOTE: Official partners include Barclays, Bond Dickinson, British Airways, British Chambers of Commerce, BT, CBI, Deloitte, DHL, EEF, EY, FSB, Funding Circle, Google Digital Garage, Heathrow, HSBC, ICAEW, Institute of Directors, Institute of Export, KPMG, Lloyds, Microsoft, NatWest, Parcel Force, PayPal, Royal Bank of Scotland, Royal Mail, Sage, Santander, Shell, The Entrepreneurs Network, Ulster Bank and Virgin.

1. Visited the Exporting Is GREAT website
2. Visited [ukti.gov.uk](http://ukti.gov.uk)
3. Visited website of one of the official partners of Exporting is GREAT
4. Visited Foreign and Commonwealth Office (FCO) website
5. Visited other business websites
6. Phoned or visited UKTI (including applying for export opportunity)
7. Phoned or visited Chambers of Commerce
8. Phoned or visited one of the official partners of Exporting is GREAT
9. Phoned or visited Foreign and Commonwealth Office

10. Done a basic assessment of your company's export potential e.g. looked at whether the product/service can be exported or gained commitment of Directors/Board
11. Assessed company's current readiness to export e.g. looked at staffing/resources costs/sales literature or export pricing
12. Investigated the rules of doing business with a country e.g. investigated regulation and rules of doing business with the country/tax/distribution and logistics/payment options/representatives/paperwork
13. Researched other aspects of an overseas market e.g. researched demand, competitors, customers, distribution channels, promotion or visited the country
14. Developed an export business plan e.g. formally planning financing, drawing up a sales and marketing plan, selecting distribution channels or developing market entry strategies
15. Something else (specify)
16. Done nothing/nothing done
17. (Don't know)

ASK IF THERE IS A CHANCE THEY WILL START EXPORTING IN THE NEXT 18 MONTHS AND THEY RECOGNISED ANY EXPORTING IS GREAT AD (Q27 = 1 OR 2) AND (AD6 = 1 OR AD7 = 1 OR AD8 = 1-3 OR AD9 = 1)

**AD14** You mentioned earlier that there was some possibility that you might start exporting in the future. To what extent would you say that your interest in exporting was a direct result of the Exporting is GREAT adverts that you saw before today. Would you say the advertising campaign...

1. Was 100% responsible - you definitely wouldn't be considering exporting if you hadn't seen the campaign
2. Was 75% responsible – the campaign was the most important factor in making you interested in exporting, but it was something that you'd vaguely been considering beforehand
3. Was 50% responsible – you were already thinking about exporting, but the campaign still played an important role in raising your interest
4. Was 25% responsible – you were already thinking seriously about exporting and the campaign only played a small part in your decision
5. The campaign had no real impact at all on your interest in exporting

ASK IF STARTED EXPORTING SINCE NOV 2015 AND AWARE OF ADS:

IF RESPONDENT ANSWERED BOTH Q20B AND Q23B: ((Q20B = 1 AND NOT Q20A = 1) AND (Q23B = 1 AND NOT Q23A = 1)) AND (AD6 = 1 OR AD7 = 1 OR AD8 = 1-3 OR AD9 = 1)

IF RESPONDENT ANSWERED Q20B BUT NOT Q23B: (Q20B = 1 AND NOT Q20A = 1) AND (AD6 = 1 OR AD7 = 1 OR AD8 = 1-3 OR AD9 = 1)

IF RESPONDENT ANSWERED Q23B BUT NOT Q20B: (Q23B = 1 AND NOT Q23A = 1) AND (AD6 = 1 OR AD7 = 1 OR AD8 = 1-3 OR AD9 = 1)

**AD15** You mentioned earlier that you started exporting recently. To what extent would you say that your decision to start exporting was a direct result of the Exporting is GREAT adverts that you saw before today. Would you say the advertising campaign...

1. Was 100% responsible - you definitely wouldn't be exporting if you hadn't seen the campaign
2. Was 75% responsible – the campaign was the most important factor in you starting to export, but it was something that you'd vaguely been considering beforehand
3. Was 50% responsible – you were already thinking about exporting, but the campaign still played an important role in raising your interest
4. Was 25% responsible – you were already thinking seriously about exporting and the campaign only played a small part in your decision
5. The campaign had no real impact at all on your decision to start exporting

**B4 : ADVERTISING MEASURES**

**End block**

**B5 : FIRMOGRAPHICS**

**Begin block**

**T3 : T3 :****Text**

I would just like to ask a few more questions in order to classify your answers.

**Q41 : SKILL. : Business capabilities****Multi coded**

Which of these does your business have?

READ OUT. MC.

**Rotated**

- 1  A written business plan
  - 2  A finance team
  - 3  UK based employees engaged in Research and Development or new product or service development activity
  - 4  Applied for or obtained any patents, trademarks or other legal protection for any of your products or services
  - 5  People with foreign language skills
  - 6  Owner / manager born overseas
  - 7  Connections with other businesses
  - 8  Owner / manager with a degree
  - 9  An overseas target
  - 10  None of these
- \*Exclusive*

Scripter notes: Only ask code 9 IF EXP\_EVER\_A or B = 2/3 OR EXPFUT = 1

**Q52 : CONN : Connections**

Single coded

Thinking back to when you, or other directors/owners, set up or joined the business, on a scale of 1 to 5 how strong were your/their connections with others in the industry?

1 is no connections, 5 is very strong connections

- 1  1
- 2  2
- 3  3
- 4  4
- 5  5

**Q42 : LEGSTAT : Business status**

Single coded

And is the business...?

READ OUT

- 1  Listed company
- 2  Owned by founder(s) who work in the business
- 3  Owned by directors / partners (not a family business)
- 4  Family business owned by family members
- 5  Owned by private shareholders who do not work in the business
- 6  Owned/part owned by another company

**Q43 : TURN : Turnover (exact)**

Numeric

**Max 99999999**

Can you please tell me the approximate turnover of your business in the past 12 months across all your UK sites?

RECORD EXACT FIGURE BELOW, IF NOT SURE, ASK FOR AN APPROXIMATE FIGURE. ALLOWED RANGE  
£0-£99,999,999

Scripter notes: Add Don't know and Refused

**Q54 : TURNVER : Verification of turnover**

Single coded

You entered [SUB: number entered at TURN in format £nn,nnn,nnn].

Is this correct?

DO NOT READ OUT - INTERVIEWER TO RESPOND

- 1  Yes
- 2  No (you will be routed back to re-enter)

Scripter notes: If no, route back to TURN

Only ask when TURN is filled in - if DK or Refused, do not ask



**Q44 : TURNNET : Turnover (bands)**

Single coded

Which of these ranges does your turnover fall into?

READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY

- 1  £0 - £150k
- 2  £150k - £300k
- 3  £300k - £500k
- 9  £500k - £600k
- 4  £600k - £2m
- 5  £2m - £25m
- 6  £25m+
- 98  Don't know
- 99  Refused

Scripter notes: If DK or refused at previous question

**Q45 : TURNIN : Turnover change**

Single coded

Compared to the previous 12 months has your turnover in the past 12 months increased, decreased or stayed roughly the same?

- 1  Increased
- 2  Decreased
- 3  Stayed roughly the same
- 98  Don't know
- 99  Refused

**Q46 : TURNNXT : Future turnover**

Single coded

And in the next 12 months do you expect your turnover to increase, decrease or stay roughly the same?

- 1  Increase
- 2  Decrease
- 3  Stay roughly the same
- 98  Don't know
- 99  Refused

**Q49 : RECONTACT : Recontact**

Single coded

The Department for Business Innovation and Skills (BIS) may be conducting further research on a related topic in the future. Would you be willing to help with that research?

- 1  Yes
- 2  No
- 3  Maybe

**Q50 : DATA : Data linkage****Single coded**

Would it be possible for BIS to link your responses to other information that you have provided previously to the Government? By this data linkage, we can reduce the burden of our surveys on your business and can improve the evidence that we use.

ADD IF NECESSARY

Data will only be used to inform research on businesses in aggregate - we will never release information that identifies any individual business - and your survey responses remain strictly confidential. Do you give your consent for us to do this?

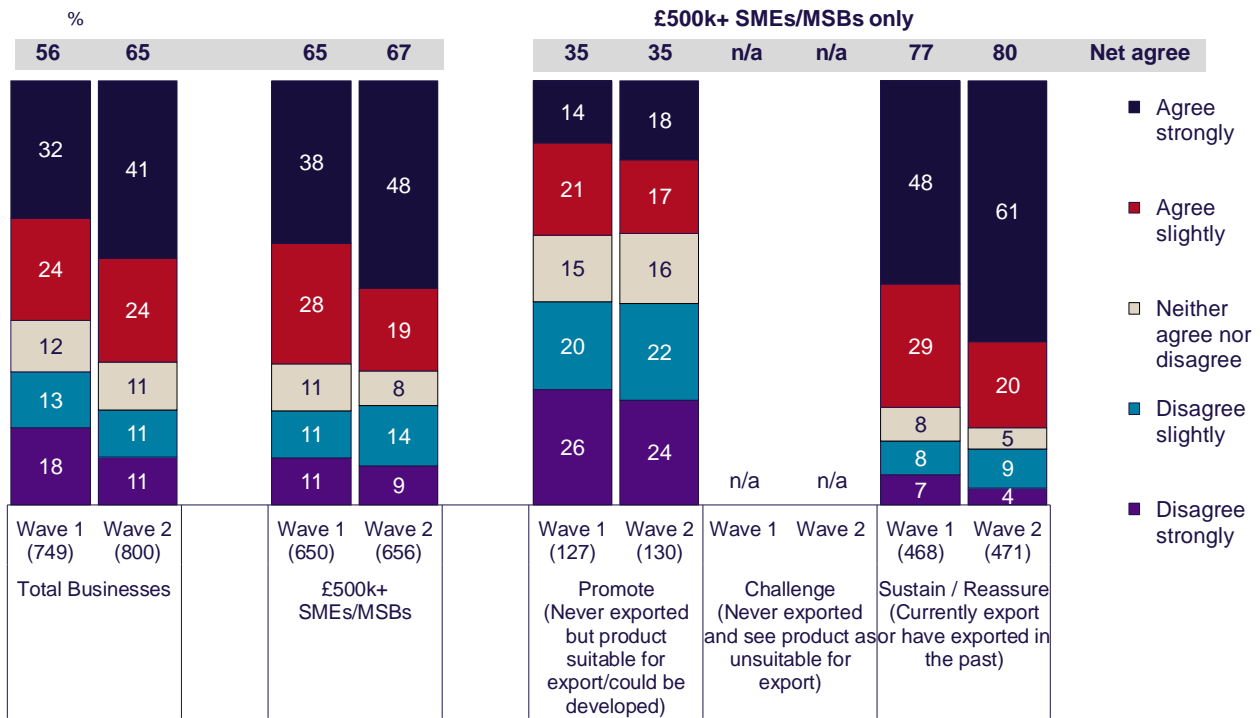
- 1  Yes
- 2  No

**B5 : FIRMOGRAPHICS****End block****T4 : T4 :****Text**

On behalf of the Department for Business, Innovation and Skills, thank you very much for your time.

## Appendix C Additional charts

**Figure C1: Agreement/Disagreement that 'International growth is an exciting prospect for my business'**

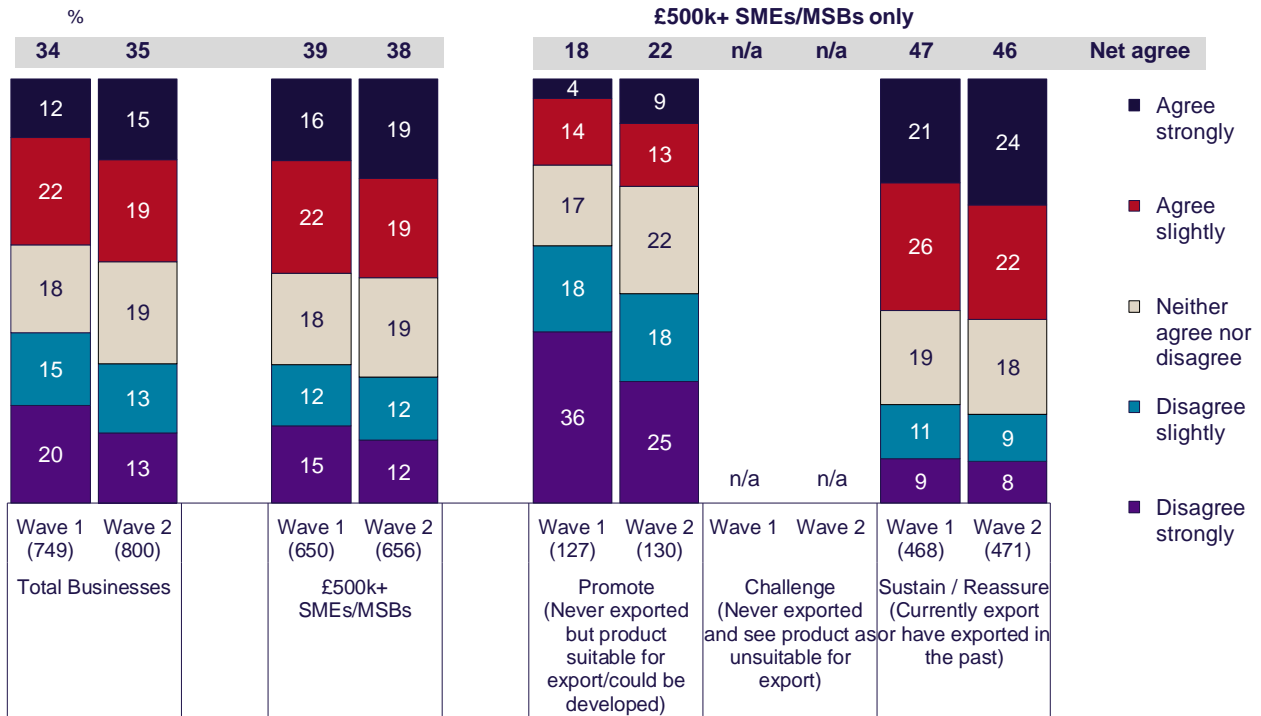


Source : EXPSTAT – To what extent do you agree or disagree that...

Base : All respondents for whom exporting is possible

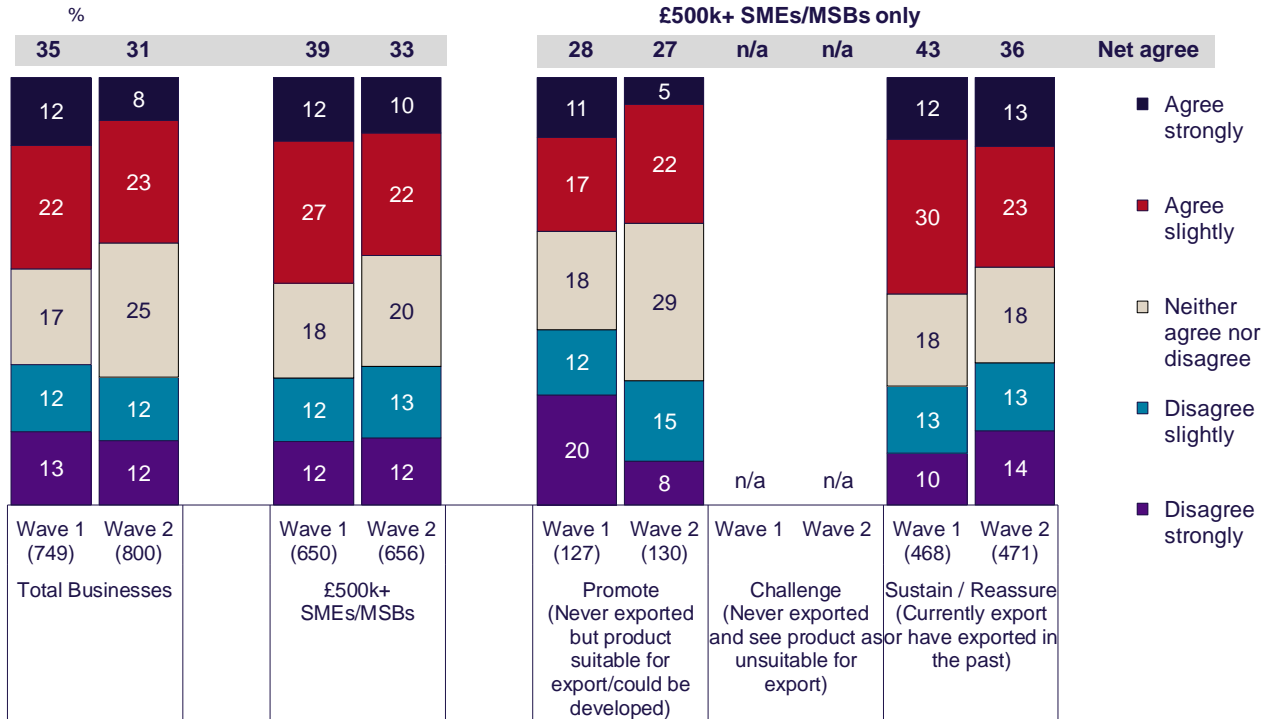
NB: Don't know not shown so does not always add to 100%

**Figure C2: Agreement/Disagreement that 'More and more businesses like mine are starting to export'**



Source : EXPSTAT – To what extent do you agree or disagree that...  
 Base : All respondents for whom exporting is possible  
 NB: Don't know not shown so does not always add to 100%

**Figure C3: Agreement/Disagreement that 'There is a lot of support available to help small and medium businesses start exporting'**

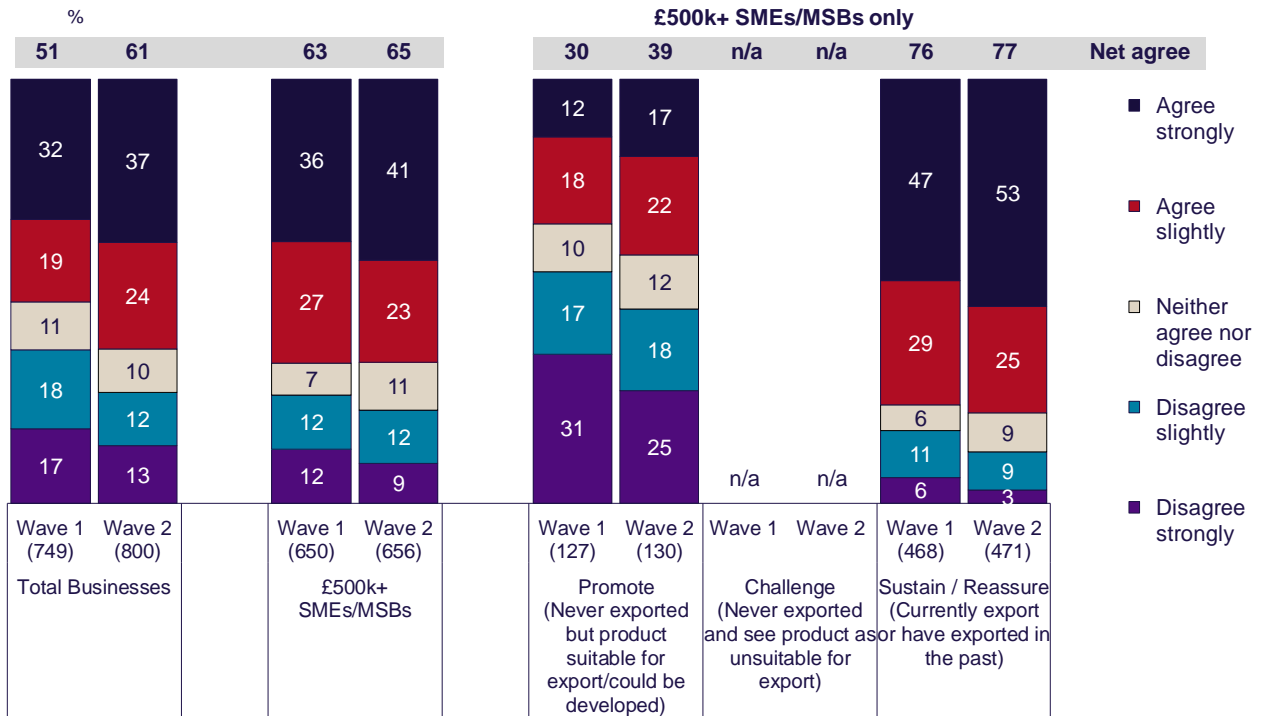


Source : EXPSTAT – To what extent do you agree or disagree that...

Base : All respondents for whom exporting is possible

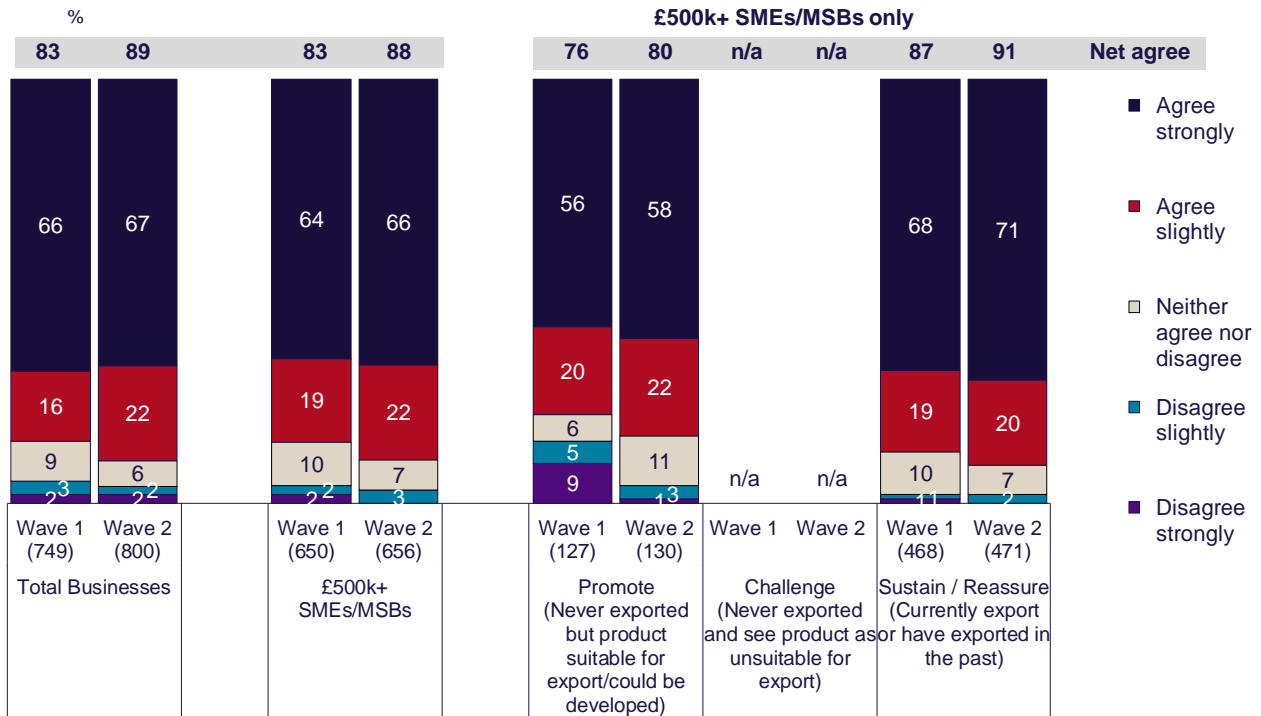
NB: Don't know not shown so does not always add to 100%

**Figure C4: Agreement/Disagreement that 'There is a lot of opportunity for my business to grow internationally'**



Source : EXPSTAT – To what extent do you agree or disagree that...  
 Base : All respondents for whom exporting is possible  
 NB: Don't know not shown so does not always add to 100%

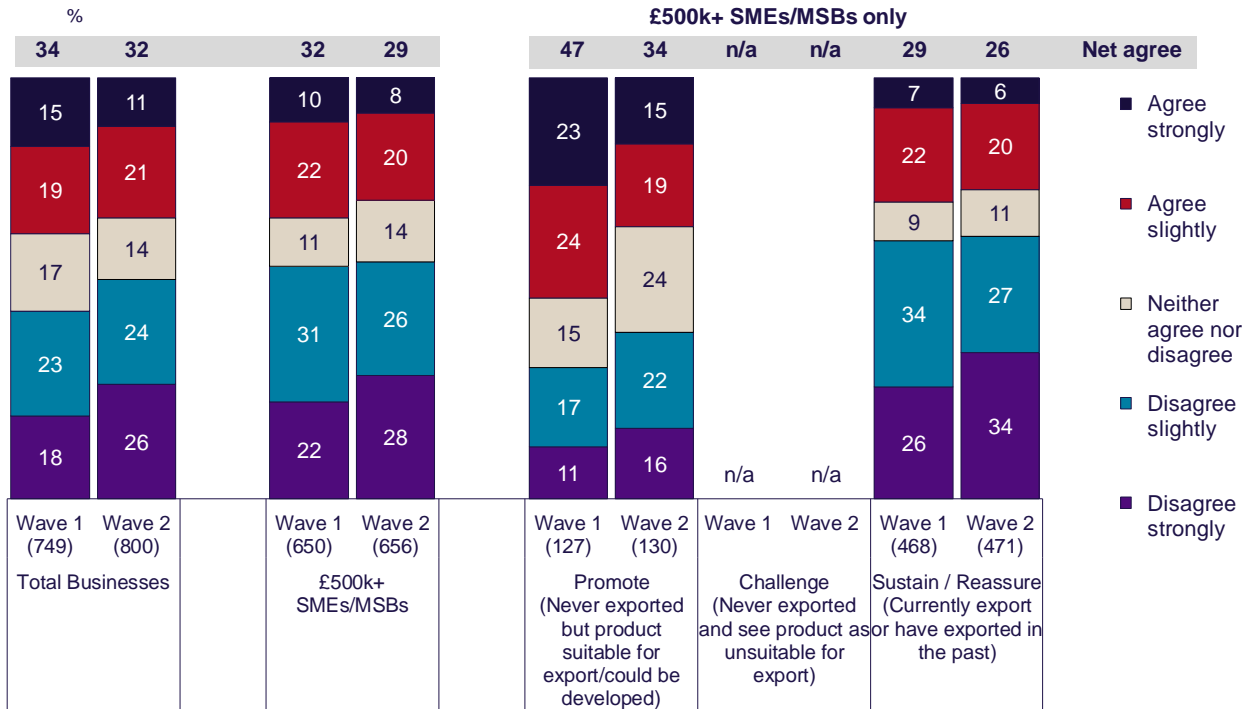
**Figure C5: Agreement/Disagreement that 'Being a successful exporter is something to be proud of'**



Source : EXPSTAT – To what extent do you agree or disagree that...  
 Base : All respondents for whom exporting is possible  
 NB: Don't know not shown so does not always add to 100%



**Figure C6: Agreement/Disagreement that 'There are too many risks in taking a business internationally'**



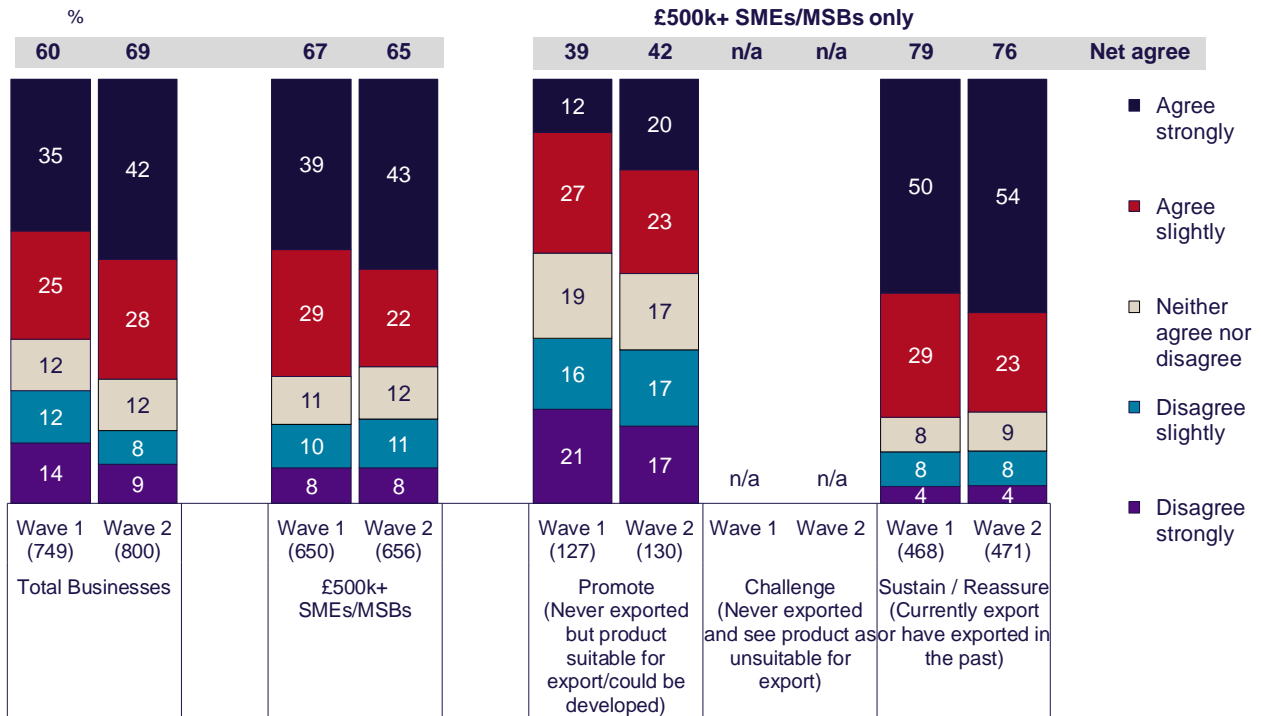
Source : EXPSTAT – To what extent do you agree or disagree that...

Base : All respondents for whom exporting is possible

NB: Don't know not shown so does not always add to 100%



**Figure C8: Agreement/Disagreement that 'Exporting would give my business the opportunity for higher or faster growth'**



Source : EXPSTAT – To what extent do you agree or disagree that...  
 Base : All respondents for whom exporting is possible  
 NB: Don't know not shown so does not always add to 100%



## Department for International Trade

great.gov.uk

### DIT

The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. We are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as delivering an outward-looking trade diplomacy strategy

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Published July 2017 by DIT