



Department for
International Trade

DIT National Survey of Registered Businesses

Technical Report – Wave 4

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1 Methodology note

This guide summarises the key technical aspects of the fourth wave of the DIT National Survey of Registered Businesses (NSRB).

1.1 Aims

The NSRB serves two broad functions which support DITs objectives. It is both a campaign evaluation tool and a wider strategic survey for the Department.

Relating to the first of these aims, the NSRB is designed to:

- Establish a range of baseline awareness measures for the *Exporting is GREAT* campaign and track changes over the course of the campaign
- Measure whether exporting attitudes and behaviours change over the duration of the campaign
 - And, crucially, determine whether businesses attribute any changes in behaviour to the campaign
- Collect diagnostic information about specific aspects of the campaign
- Measure awareness and usage of the great.gov.uk website

Relating to the second of these aims, the NSRB:

- Provides a measure of the size of the opportunity and challenge for DIT in terms of the proportion and number of companies at different stages of the exporting journey
- Gives information on barriers to exporting
- Identifies the level of interest in, and engagement with, exporting support and advice
- Highlights skills/resource/knowledge gaps

The most recent wave of the survey (Wave 4) includes several new questions designed to:

- Quantify business confidence in UK exports over the next year
- Better understand the specific issues facing businesses in Northern Ireland
- Identify whether businesses are active or passive in their exporting behaviours
- Provide additional information about exports to four key markets (USA, Australia, China and New Zealand)
- Determine levels of engagement with paid export services
- Identify issues which are causing businesses to stop or reduce their exports

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.

1.2 Research phasing

The timings of the four waves of interviews to date were as follows:

- Wave 1: 20th October to 6th November 2015
- Wave 2: 1st April to 4th May 2016
- Wave 3: 26th July to 7th September 2017
- Wave 4: 23rd October 2018 to 4th January 2019

Wave 1 was timed such that interviewing was completed before the first burst of activity in the *Exporting is GREAT* campaign began.

Wave 2 was timed such that interviewing began immediately after the initial bursts of the *Exporting is GREAT* campaign activity had been completed.

Wave 3 was timed such that interviewing was completed prior to the recommencement of activities in Q3 2017.

Wave 4 was timed such that it followed bursts of campaign activities which ran in Q1 and Q3/Q4 2018.

1.3 Sampling

1.3.1 Sample scope

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

All businesses accessible through the Inter Departmental Business Register (IDBR) were in scope for the survey. The IDBR covers approximately 2.7 million businesses in all sectors of the UK economy.¹ The IDBR's coverage is of a high quality, allowing for highly representative samples to be drawn. It is drawn from sources including business surveys conducted by the ONS, VAT and PAYE data from HMRC, and data from Companies House and Dun and Bradstreet. As such, the main omissions from the IDBR are very small businesses operating without VAT or PAYE schemes and some non-profit organisations.²

To create the sampling frame the canonical data set was filtered to only include organisations with a legal status defined as 'Company', 'Sole Proprietor' or 'Partnership'. The sample frame therefore excludes non-commercial organisations defined as 'Public Corporation', 'Central Government', 'Local Authority' and 'Non-profit body or Associations'.

¹ <http://www.ons.gov.uk/aboutus/whatwedo/paidservices/interdepartmentalbusinessregisteridbr>

² Businesses are not required to register for VAT unless they have a VAT taxable turnover of more than £85,000. However, some businesses with turnovers below this threshold voluntarily choose to register for VAT.

The sample frame also excludes organisations with incomplete data on any of location, sector, turnover or employee numbers. The final sampling frame consisted of a total of 1,967,471 registered businesses.

As the core target of the *Exporting is GREAT* campaign consisted of businesses with a turnover of £500k+, these were oversampled relative to their true proportions in the population of businesses. This allows for more robust sub-group analysis amongst £500k+ businesses, but also means that the effective base size when looking at findings amongst all businesses is reduced.³

In line with increased demand for insight into the issues affecting businesses in the devolved nations of Scotland, Wales and Northern Ireland, these were also oversampled relative to their true proportions in the population of businesses, in order to allow for more robust comparisons between the nations of the United Kingdom.

1.3.2 Sample stratification

Quotas were applied to ensure that the required number of interviews with businesses of different sizes was achieved (see Section 1.3.3). However, underlying these quotas, a stratified random probability approach was used when the sample was drawn. The strata employed are shown in Figure 1.1.

Figure 1.1: Sample stratification variables

Variables used in the sample stratification	
Type/Size of Business	<£500k turnover with 0 employees
	<£500k turnover with 1-2 employees
	<£500k turnover with 3-4 employees
	<£500k turnover with 5-9 employees
	<£500k turnover with 10 or more employees
	£500k to £24,999,999 turnover with 0 employees
	£500k to £24,999,999 turnover with 1-4 employees
	£500k to £24,999,999 turnover with 5-9 employees
	£500k to £24,999,999 turnover with 10-19 employees
	£500k to £24,999,999 turnover with 20-49 employees
	£500k to £24,999,999 turnover with 50-99 employees
	£500k to £24,999,999 turnover with 100-249 employees
	£25m to £499,999,999 turnover with 0 employees
	£25m to £499,999,999 turnover with 1-19 employees

³ The effective base size takes account of the fact that weighting typically increases the margins of error associated with the data. A lower effective base size corresponds to wider margins of error. This is discussed further in Section 1.8.

	£25m to £499,999,999 turnover with 20-49 employees
	£25m to £499,999,999 turnover with 50-249 employees
	£500m or higher turnover OR 250 or more employees
Region	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

1.3.3 Quotas

Quotas were applied to ensure that the sample profile matched the target in terms of company size and ensured continuity with Waves 1 to 3. The quotas were chosen to ensure that a robust sample of £500k+ businesses was achieved. Figure 1.2 shows how the achieved number of interviews in each group varied from the target. Differences between the target and achieved totals were minor - a slightly lower than targeted number of interviews with sub-£500k turnover business was achieved but this was offset by above-quota totals for larger businesses.

For the first time at Wave 4 quotas were also placed on interviews in Scotland, Wales and Northern Ireland to ensure a minimum of 200 interviews in each. These were exactly met in the final achieved sample.

Figure 1.2: Wave 4 quota targets compared to achieved interviews

Company type/size	Quota Target	Interviews achieved
£500k+ SMEs (Have employees and with a turnover £500k up to £25m)	1,717	1,730
MSBs and Large businesses (Have employees and a turnover of £25m or higher)	450	461
Others within IDBR universe (No employees OR those with a turnover below £500k)	833	809
Region	Quota Target	Interviews achieved
England	2,400	2,400
Scotland	200	200
Wales	200	200
Northern Ireland	200	200

1.4 Questionnaire design

The Wave 4 questionnaire was based on the questionnaires employed in earlier waves. These earlier questionnaires had, where possible, drawn questions from other public domain studies. The previous GREAT Britain campaign evaluation questionnaire was a key source of content. This approach to questionnaire design was adopted with a view to providing comparability with other data sets and also mitigating the risks associated with going into field without a full testing phase (as the Wave 1 and 2 schedules did not allow for a phase of cognitive testing).

Kantar worked closely with DIT to develop a number of new questions for inclusion at Wave 4. The new questions were positioned in the interview (and worded) with a view to ensuring that they would not impact on trends from earlier waves.

The interview at Wave 3 was relatively long and conscious efforts were made to ensure that the Wave 4 questionnaire placed less time-burden on those participating. The average length at each wave was:

- Wave 1 = 14 minutes
- Wave 2 = 18 minutes
- Wave 3 = 21 minutes
- Wave 4 = 18 minutes

A full copy of the Wave 4 questionnaire is included in Section 2.11. Questionnaires from Waves 1 to 3 can be found in the earlier published technical appendices.⁴

1.5 Data collection

Interviews were conducted using a Computer Assisted Telephone Interviewing (CATI) method. As such, the questionnaire was programmed in specialist interviewing software, ensuring that any question filtering was applied accurately during the interview.

Because IDBR records do not always include telephone contact details, a look-up process was conducted prior to fieldwork to increase coverage. This process involved cross referencing the address details of businesses for whom contact numbers were not available against a business database, as well as conducting manual searches for contact numbers.

The survey was administered by the Kantar team of specialist interviewers. Interviewers received a briefing from the research team prior to fieldwork, with a view to ensuring that they understood the policy background to the study and were fully appraised of how to deal with any queries which respondents were likely to raise during the course of the interview.

As the survey related to business issues, and the contact details appended to the sample consisted primarily of business rather than personal telephone numbers, interviewing was conducted during standard working hours. Where respondents were unable to participate at the point of first contact, follow-up appointments were booked as necessary.

Interviews were conducted with business owners, proprietors, MDs and other senior decision makers who were best qualified to talk about the company's business. Staff working in HR or facilities roles were excluded from the survey on the basis that they were

⁴ Wave 1 & 2 questionnaires in technical appendix can be found at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/625539/FI_NAL_DIT_survey_of_registered_business_report_technical_annex_05_07_17a.pdf

Wave 3 questionnaire can be found at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/714400/DIT_National_Survey_technical_report_Wave_3.pdf

less likely to be able to answer specific questions on the exporting behaviours and plans of the business.

1.6 Fieldwork outcomes

The total sample achieved at each wave was as follows:

- Wave 1 = 1,405 interviews
- Wave 2 = 1,418 interviews
- Wave 3 = 2,991 interviews
- Wave 4 = 3,000 interviews

The fieldwork outcomes in each wave are summarised in Figure 1.3. There was a higher incidence of deadwood (unusable sample) at Wave 4. Businesses had also become less willing to participate, with a higher incidence of deferrals than was seen in previous waves.

Figure 1.3: Fieldwork outcomes

	Wave 1	Wave 2	Wave 3	Wave 4
Total issued sample	22,614	23,383	44,094	43,347
Completed interviews	1,405	1,418	2,991	3,000
Hard refusal to participate (refused altogether / refused screening information / broke off during interview)	1,266	1,320	4,795	3,796
Soft refusal to participate (repeated deferrals when contacted / claimed unavailable during fieldwork / claimed unable to participate)	636	572	2,462	7,569
Bad sample/deadwood (telephone number not active / company not known at number / caller ID block / duplicate number / public sector)	2,206	2,197	6,519	8,064
Interview abandoned (telephone line issues / IT issues)	18	13	128	80
Unresolved outcomes (engaged tones / answer machines / no answer / respondent requested call back / sample not contacted / quota full)	17,083	17,863	27,199	20,838

1.7 Weighted and unweighted sample profiles

Weights are applied to survey data to ensure that they matched the profile of the population of interest (in this case UK registered businesses). In this case, the weights correct for the fact that some types of businesses may be less willing to participate in research than others. They also correct for any deliberate skews in the sample. As discussed earlier, this wave of the NSRB deliberately over-sampled businesses with a turnover of £500k+ and businesses in Scotland, Wales and Northern Ireland, and the weights therefore pull these back to representative proportions in the total business population data set.

The larger sample size at Waves 3 and 4 meant that it was possible to apply a more detailed weighting matrix while maintaining usable effective base sizes.

1.7.1 Wave 1 and 2 weights

At Waves 1 and 2, data were weighted on three fundamental variables to ensure that the survey data quoted in the main survey report was representative of the population of IDBR businesses.

Weights were applied to:

- Turnover interlocked with number of employees
 - £500k+ turnover SMEs with 1-4 employees
 - £500k+ turnover SMEs with 5-9 employees
 - £500k+ turnover SMEs with 10-49 employees
 - £500k+ turnover SMEs with 50-99 employees
 - £500k+ turnover SMEs with 100-249 employees
 - MSBs with 1 or more employees
 - All other businesses on IDBR frame

- Region
 - England North
 - England Midlands
 - England South
 - Scotland
 - Wales
 - Northern Ireland

- Sector (based on Standard Industry Classifications, SICs)
 - Manufacturing
 - Infrastructure
 - Distribution
 - Financial, Professional, Technical and Creative
 - 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 difference between the weighted and unweighted sample profiles is summarised in Figures 1.4 and 1.5. The data in these Figures have been rounded – as such, the sum of the sub-groups may differ slightly from the overall total figures.

As discussed earlier, the Wave 1 and 2 sample structure focused on £500k+ SMEs/MSBs, which were over-sampled as a proportion of the total. That being the case, the weights applied to the Total Businesses data set were relatively heavy and this affects the reliability of the data. This is discussed further in the following section.

Figure 1.4: Wave 1 and 2 weighted versus unweighted sample profile amongst the Total Business sample

	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
Company size				
£500k+ SME with 1-4 employees	174	61	202	69
£500k+ SME with 5-9 employees	185	67	158	67
£500k+ SME with 10-49 employees	460	120	461	119
£500k+ SME with 50-99 employees	96	15	77	15
£500k+ SME with 100-249 employees	49	6	50	6
MSB with 1 or more employees	196	8	191	9
All other businesses on IDBR frame	245	1128	279	1134
Region				
South of England	551	611	632	619
Midlands	369	344	341	347
North of England	251	266	263	268
Scotland	95	92	81	92
Wales	72	49	48	49
Northern Ireland	67	43	53	42
Sector (based on SICs)				
Manufacturing	232	198	235	197
Distribution	428	406	420	399
Infrastructure	202	259	188	268
Finance, Professional, Technical and Creative	252	295	289	303
Other	291	247	286	251
Overall Total	1,405	1,405	1,418	1,418

Figure 1.5: Wave 1 and 2 weighted versus unweighted sample profile amongst the £500k+ SMEs/MSBs sample

	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
Company size				
£500k+ SME with 1-4 employees	174	256	202	279
£500k+ SME with 5-9 employees	185	280	158	267
£500k+ SME with 10-49 employees	460	503	461	477
£500k+ SME with 50-99 employees	96	61	77	58
£500k+ SME with 100-249 employees	49	25	50	24
MSB with 1 or more employees	196	34	191	34
All other businesses on IDBR frame	n/a	n/a	n/a	n/a
Region				
South of England	448	490	500	484
Midlands	309	289	285	284
North of England	213	229	201	224
Scotland	78	78	71	76
Wales	56	41	38	40
Northern Ireland	56	33	44	32
Sector (based on SICs)				
Manufacturing	203	164	196	159
Distribution	356	353	338	342
Infrastructure	168	198	152	201
Finance, Professional, Technical and Creative	210	209	225	207
Other	223	236	228	229
Overall Total	1,160	1,160	1,139	1,139

1.7.2 Wave 3 and 4 weights

The main difference between the Wave 3 and 4 weights and those used in Waves 1 and 2 is that the total population weights in the later waves are more granular when it comes to adjusting the profile of companies with a turnover of less than £500k (with additional controls on very small companies with only 0-2 employees). This means that trends amongst the total business population may have been affected (with data from Waves 3 and 4 being more accurate).

The total business population weights were applied to the following variables:

- Turnover interlocked with number of employees
 - Less than £500k turnover with 0-2 employees
 - Less than £500k turnover with 3-9 employees
 - Less than £500k turnover with 10+ employees
 - £500k to £499,999,999 turnover with 0-19 employees
 - £500k to £499,999,999 turnover with 20-49 employees
 - £500k to £499,999,999 turnover with 50-249 employees
 - £500k to £499,999,999 turnover with 250+ employees OR £500m+ turnover

- Region
 - England North
 - England Midlands
 - England South
 - Scotland
 - Wales
 - Northern Ireland

- Sector
 - Manufacturing
 - Infrastructure
 - Distribution
 - Financial services
 - Other

The £500k+ sample weights were applied to the following variables:

- Region interlocked with turnover and number of employees
 - North with £500k+ turnover and 20-49 employees
 - North with £500k+ turnover and 50-249 employees
 - North - All other with £500k+ turnover
 - Midlands with £500k+ turnover and 20-49 employees

- Midlands with £500k+ turnover and 50-249 employees
- Midlands - All other with £500k+ turnover
- South with £500k+ turnover and 20-49 employees
- South with £500k+ turnover and 50-249 employees
- South - All other with £500k+ turnover
- Scotland with £500k+ turnover and 20-49 employees
- Scotland with £500k+ turnover and 50-249 employees
- Scotland - All other with £500k+ turnover
- Wales with £500k+ turnover and 20-49 employees
- Wales with £500k+ turnover and 50-249 employees
- Wales - All other with £500k+ turnover
- Northern Ireland with £500k+ turnover and 20-49 employees
- Northern Ireland with £500k+ turnover and 50-249 employees
- Northern Ireland - All other with £500k+ turnover

- Sector interlocked with turnover and number of employees
 - Manufacturing with £500k+ turnover and 20-49 employees
 - Manufacturing with £500k+ turnover and 50-249 employees
 - Manufacturing - All other with £500k+ turnover
 - Infrastructure with £500k+ turnover and 20-49 employees
 - Infrastructure with £500k+ turnover and 50-249 employees
 - Infrastructure - All other with £500k+ turnover
 - Distribution with £500k+ turnover and 20-49 employees
 - Distribution with £500k+ turnover and 50-249 employees
 - Distribution - All other with £500k+ turnover
 - Financial services with £500k+ turnover and 20-49 employees
 - Financial services with £500k+ turnover and 50-249 employees
 - Financial services - All other with £500k+ turnover
 - Other with £500k+ turnover and 20-49 employees
 - Other with £500k+ turnover and 50-249 employees
 - Other - All other with £500k+ turnover

- Turnover interlocked with number of employees
 - £500k-£24,999,999 turnover with 0-4 employees
 - £500k-£24,999,999 turnover with 5-9 employees
 - £500k-£24,999,999 turnover with 10-19 employees
 - £500k-£24,999,999 turnover with 20-49 employees
 - £500k-£24,999,999 turnover with 50-99 employees
 - £500k-£24,999,999 with 100-249 employees
 - £25m-£499,999,999 turnover with 0-19 employees
 - £25m+ with 20-49 employees

- £25m+ with 50-249 employees
- £500m+ with fewer than 20 or 250+ employees OR £500k+ turnover with 250+ employees

The weights were applied to IDBR data appended to the main survey data set as opposed to the equivalent measures collected in the survey itself (as the weighting targets were themselves based on IDBR data). The survey responses typically correspond with IDBR figures – as such this change from Waves 1 and 2, where the weights were primarily applied to survey responses, does not represent a significant change in approach.

Figure 1.6 Wave 3 and 4 weighted versus unweighted sample profile amongst the Total Business sample

	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
Company size				
Less than £500k turnover with 0-2 employees	250	1,887	288	1,848
Less than £500k turnover with 3-9 employees	169	437	223	458
Less than £500k turnover with 10+ employees	37	63	41	65
£500k to £499,999,999 turnover with 0-19 employees	1,340	449	1,199	466
£500k to £499,999,999 turnover with 20-49 employees	527	99	572	102
£500k to £499,999,999 turnover with 50-249 employees	507	48	530	51
£500k to £499,999,999 turnover with 250+ employees OR £500m+ turnover	161	12	147	11

Region				
South of England	1,268	1,280	1,164	1,294
Midlands	771	745	740	731
North of England	544	559	496	562
Scotland	202	200	200	199
Wales	99	117	200	121
Northern Ireland	107	90	200	93
Sector (based on SICs)				
Manufacturing	519	365	547	367
Distribution	915	652	977	690
Infrastructure	387	544	396	540
Finance, Professional, Technical and Creative	630	954	569	938
Other	540	476	511	465
Overall Total	2,991	2,991	3,000	3,000

Figure 1.7: Wave 3 and 4 weighted versus unweighted £500k+ sample profile (1 of 2)

	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
Region interlocked with turnover and number of employees				
North with £500k+ turnover and 20-49 employees	99	89	81	86
North with £500k+ turnover and 50-249 employees	118	46	110	43
North - All other with £500k+ turnover	255	360	202	347
Midlands with £500k+ turnover and 20-49 employees	139	104	148	100
Midlands with £500k+ turnover and 50-249 employees	140	51	119	49
Midlands - All other with £500k+ turnover	386	492	331	468
South with £500k+ turnover and 20-49 employees	225	160	222	155
South with £500k+ turnover and 50-249 employees	187	81	229	79
South - All other with £500k+ turnover	655	834	517	812
Scotland with £500k+ turnover and 20-49 employees	30	28	41	27
Scotland with £500k+ turnover and 50-249 employees	33	15	30	14
Scotland - All other with £500k+ turnover	104	119	102	114
Wales with £500k+ turnover and 20-49 employees	17	15	44	15
Wales with £500k+ turnover and 50-249 employees	20	8	28	7
Wales - All other with £500k+ turnover	43	63	95	60
Northern Ireland with £500k+ turnover and 20-49 employees	17	13	36	12
Northern Ireland with £500k+ turnover and 50-249 employees	12	5	17	6
Northern Ireland – All other with £500k+ turnover	55	53	96	52

Figure 1.8: Wave 3 and 4 weighted versus unweighted £500k+ sample profile (2 of 2)

	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
Sector interlocked with turnover and number of employees				
Manufacturing with £500k+ turnover and 20-49 employees	93	63	117	59
Manufacturing with £500k+ turnover and 50-249 employees	126	41	127	39
Manufacturing - All other with £500k+ turnover	243	228	218	216
Infrastructure with £500k+ turnover and 20-49 employees	66	51	57	50
Infrastructure with £500k+ turnover and 50-249 employees	51	23	61	23
Infrastructure - All other with £500k+ turnover	227	388	222	383
Distribution with £500k+ turnover and 20-49 employees	145	122	175	118
Distribution with £500k+ turnover and 50-249 employees	134	48	163	48
Distribution - All other with £500k+ turnover	491	570	460	542
Financial services with £500k+ turnover and 20-49 employees	103	76	100	75
Financial services with £500k+ turnover and 50-249 employees	85	41	82	40
Financial services - All other with £500k+ turnover	305	350	236	342
Other with £500k+ turnover and 20-49 employees	120	99	123	93
Other with £500k+ turnover and 50-249 employees	114	53	100	50
Other - All other with £500k+ turnover	232	385	207	370
Turnover interlocked with number of employees				
£500k-£24,999,999 turnover with 0-4 employees	594	631	491	634
£500k-£24,999,999 turnover with 5-9 employees	208	611	171	588
£500k-£24,999,999 turnover with 10-19 employees	477	624	469	576
£500k-£24,999,999 turnover with 20-49 employees	451	401	512	388

£500k-£24,999,999 turnover with 50-99 employees	241	124	242	121
£500k-£24,999,999 turnover with 100-249 employees	82	51	76	50
£25m-£499,999,999 turnover with 0-19 employees	61	10	68	11
£25m+ with 20-49 employees	76	8	60	7
£25m+ with 50-249 employees	187	30	215	29
£500m+ with fewer than 20 or 250+ employees OR £500k+ turnover with 250+ employees	158	46	144	44
Overall Total	2,535	2,535	2,448	2,448

1.8 Effective base sizes and margins of error

Applying weights to data, while tending to make the quoted figures more representative of the population of interest, also serves to reduce the statistical reliability of the data. It is therefore necessary to calculate the 'effective' base size to take account of this effect – essentially the difference between the unweighted base and the effective base indicates the extent to which data have become less precise due to weighting. This effect has been taken into account in determining whether or not differences described throughout the main survey report are statistically significant i.e. all significance testing has used the effective base size in the calculations rather than the unweighted base sizes.⁵⁶

As shown in Figure 1.9, the effective base size for the 'all businesses' group is lower than that for the SMEs/MSB group. This was 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. Therefore, any such businesses which were included in the NSRB sample were given strong upweights in the 'all businesses' data set and this reduced the effective base size significantly.

The £500k+ data sets⁷ exclude these smaller businesses and the weights applied are consequently less strong, hence the comparatively large effective base sizes.

The additional complexity of the weights employed at Waves 3 and 4 accounts for the fact that the unweighted base vs. effective base ratio is higher in these later waves.

⁵ The effective base size is calculated as:

(sum of the weight factors applied to each record) squared / the sum of the squared weight factors

⁶ However, see Section 1.14 for further discussion of the validity of significance testing quota samples

⁷ Strictly speaking the definition was £500k+ SME/MSBs at Waves 1 and 2 rather than all £500k+ businesses. As discussed earlier, there is relatively little difference in these definitions and for the purposes of the survey reports they have been deemed to be acceptable proxies for one another

The introduction of quotas on interviews in Scotland, Wales and Northern Ireland at Wave 4 (which were higher than the natural incidence of businesses in those regions) meant that larger weights were necessary and the effective base size reduced accordingly.

Figure 1.9: Unweighted and effective base sizes by data set

	Wave 1	Wave 2	Wave 3	Wave 4
All businesses – unweighted base	1,405	1,418	2,991	3,000
<i>All businesses – effective base</i>	<i>347</i>	<i>405</i>	<i>550</i>	<i>635</i>
£500k+ turnover – unweighted base	1,160	1,139	2,535	2,448
<i>£500k+ turnover – effective base</i>	<i>922</i>	<i>909</i>	<i>1,617</i>	<i>1,319</i>

Survey data are subject to error - in most cases the responses obtained from a survey sample will not perfectly reflect the wider population that the sample represents.

Strictly speaking confidence intervals cannot be applied to quota samples, such as that employed by the NSRB, given that they do not use known probabilities of selection.

We have applied significance testing to the data and have used this to guide our commentary in the Wave 4 NSRB report.⁸ Charts throughout the report also highlight where differences across waves or between sub-groups are sufficiently large to note.

However, due to the sampling method, none of the findings in this report are statistically significant in the conventional sense, that is being able to assume to within a stated degree of probability that they also apply to the wider population. Where ‘significance’ is referenced, this is only intended as a guide to the findings that stood out within this dataset.

The indicative margins of error associated with the effective base sizes outlined in Figure 1.9 are summarised in Figure 1.10. As discussed in Section 1.14 below, the margins of error (also referred to as confidence intervals) around a quota sample should be viewed as an indicative approximation.

Figure 1.10: Indicative margins of error

	Wave 1	Wave 2	Wave 3	Wave 4
All businesses – effective base	347	405	550	635
<i>All businesses – margin of error</i>	<i>+/- 5.3%</i>	<i>+/- 4.9%</i>	<i>+/- 4.2%</i>	<i>+/- 3.9%</i>

⁸ Commentary throughout the report focuses on data that, in an equivalent random probability sample, would be 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.

£500k+ turnover – effective base	922	909	1,617	1,319
£500k+ turnover – margin of error	+/- 3.2%	+/- 3.3%	+/- 2.4%	+/- 2.7%

1.9 Data processing

With the exception of the coding of responses to open-ended questions, no data entry phase was required for this CATI survey. The programmed script ensured that all question routing was performed automatically and no post-editing of the data was required in the way that might be necessary for surveys administered using a 'Pencil and Paper' method.

Responses from fully open-ended questions were collated and code frames created to reflect all key themes in the responses. Responses from questions with an 'other – specify' option were analysed and, if appropriate, back-coded into one of the pre-coded categories. If the response could not be assigned to an existing code but gained a sufficient number of mentions, a new code was created which all relevant responses were assigned to. Coding was carried out by a specialist team. All coders who worked on the study were briefed and a written set of instructions was made available. Code frames were created by the coding team in the first instance and approved by the research team.

1.10 Sector definitions

The industry sectors referred to throughout the main survey report are defined as follows. All definitions are based on UK SIC (2007) sections.⁹ Respondents self-classified their businesses into these sectors during the survey.

Figure 1.11: Sector groupings

New category name for reporting	UK SIC (2007) sections
Construction & Real Estate	L (Real estate) and F (Construction)
Consumer Discretionary	R (Arts, entertainment & recreation) and I (Accommodation and food service activities)
Education and Health	P (Education) and Q (Human health and social work activities)
Financial & Insurance	K (Financial & insurance activities)
Information & Communication	J (Information & Communication)
Manufacturing, Raw Materials & Energy	A (Agriculture, forestry & fishing), B (Mining and quarrying), C (Manufacturing), D (Electricity, gas, steam and air conditioning supply) and E (Water supply; sewerage, waste management and remediation activities)
Professional & Services	M (Professional, scientific and technical activities) and N (Administrative and support service activities)
Transportation & Storage	H (Transport and storage)
Wholesale & Retail	G (Wholesale and retail trade; repair of motor vehicles and motor cycles)
Other	S (Other service activities) and T (Activities of households as employers; undifferentiated goods and services-producing activities of households for own use)

1.11 Data quality of the survey

The data collection for the NSRB is conducted in line with Market Research Society standards. All quoted survey data have been through a rigorous QA process whereby figures are checked by both DIT statisticians and researchers at Kantar.

The margins of error associated with the survey data have been discussed in Section 1.8.

⁹ Further details are available on the ONS website:

<https://www.ons.gov.uk/methodology/classificationsandstandards/ukstandardindustrialclassificationofeconomicactivities/uksic2007>

Where NSRB reporting estimates the number of businesses falling into a given category (as opposed to the proportion) these estimates draw upon either the total number of registered businesses recoded on the IDBR, or else the NSRB sampling frame (see section 1.3.1). Which of these is being used for a given estimate is specified within the report.

To note, where estimates are based on the total number of registered businesses recorded on the IDBR, this means that the accuracy of the estimate in question is dependent upon the assumption that businesses which were excluded would have responded similarly to those sampled.

The IDBR is fully compliant with the European Union regulation on harmonisation of business registers for statistical purposes ([EC No 177/2008](#)) and queries on the IDBR can be addressed by emailing: idbr.helpdesk@ons.gov.uk.

1.12 Users and uses of the report

DIT publishes data from NSRB with a view to encouraging a broad range of users to draw upon the data. Users of NSRB data may include ministers, policy makers and analysts within the Department for International Trade, policy makers within central government, Devolved Administrations and Local Authorities, trade associations, exporting consultancy companies, non-profit organisations/charities, international statistics organisations, academia, media and the public.

The survey data serve to inform the ongoing design and media planning of the Exporting is GREAT campaign. They also provide valuable information for a range of stakeholders, allowing a better understanding of changing UK business behaviours and attitudes towards exporting. In particular, they provide DIT with a better understanding of the factors which inhibit businesses from exporting and the support that businesses will need if they are to start exporting in greater numbers or volumes.

NSRB data are published in the interests of transparency and to provide as broad a group of stakeholders as possible with information which may help to boost UK exports.

1.13 Glossary

An explanation of some of the terms used throughout the NSRB reports and data tabulations is shown in Figure 1.12 below.

Figure 1.12: Glossary

£500k+ businesses	UK registered businesses with a turnover of £500,000 per year or more (see also entry for registered businesses)
ABS	The Annual Business Survey. The ABS is the main structural business survey conducted by the Office for National Statistics

(the) Challenge segment	NSRB terminology to describe businesses which have never exported and do not currently see their goods or services as suitable for export.
DIT	The Department for International Trade
EiG	The Exporting is GREAT marketing campaign
IDBR	The Inter-Departmental Business Register. The IDBR provides the main sampling frame for surveys of businesses carried out by the Office for National Statistics (ONS) and other government departments. The IDBR covers 2.6 million businesses in all sectors of the UK economy, other than very small businesses (those without employees and with turnover below the tax threshold) and some non-profit making organisations.
MSB	Mid-Sized Business. For the purposes of early waves of the NSRB these were defined as having at least one employee and a turnover of £25m up to £500m. From Wave 3 DIT's preferred definition was updated such that we now focus on 'Medium businesses' rather than mid-sized businesses. Medium businesses are defined as having 50-249 employees and a turnover of £500k+.
(the) Promote segment	NSRB terminology to describe businesses which have never exported but which self-identify as having goods or services which could potentially be exported or developed for export.
(the) Reassure segment	NSRB terminology to describe businesses which haven't exported in the past 12 months, but which had exported previously.
Registered businesses	Business which appear on the Inter-Departmental Business Register (see also entry for IDBR)
SME	Small and Medium sized Enterprise. For the purposes of early waves of the NSRB these were defined as having between 1 and 249 employees and a turnover of less than £25m. From Wave 3 DIT's preferred definition was updated such that we now focus on 'Small and Medium businesses' rather than SMEs. Medium businesses are defined as having 50-249 employees and a turnover of £500k+. Small businesses are defined as having 10-49 employees and a turnover of £500k+.
(the) Sustain segment	NSRB terminology to describe current exporters i.e. businesses which have exported goods or services in the past 12 months.

1.14 Reporting methodology

As outlined in section 1.8, all commentary in the published reports focuses on differences (between waves or between sub-groups) that are statistically significant at a 95 per cent confidence level, albeit with the proviso that strictly speaking confidence intervals cannot be applied to quota samples.

Underlying percentage figures are rounded to the nearest whole integer (e.g. all trailing decimals are removed). Some percentages may not add up to the totals due to rounding or the exclusion of 'don't know' responses from some charts.

1.15 Revisions policy

On occasions, previously published data will need to be revised due to changes to source data or correcting of errors. These will be made at the time of the next release. Data that are revised from the previous release will be denoted with "r" or with a footnote explaining the change. Where a large revision has taken place reasons will be provided.

1.16 Further information and feedback

Any enquiries or comments in relation to the methodology set out in this document should be sent to the following email address: statistics@trade.gov.uk

Further information on the range of DIT's statistics is available at:
<https://www.gov.uk/government/organisations/department-for-international-trade>

2 Background Quality Report

2.1 Background to the release

This chapter provides a summary of quality issues relating to statistics gathered through the NSRB (which have been compiled by Kantar on behalf of DIT).

Four waves of data collection have been completed to date. Data from the first two waves were published on 5th July 2017, alongside a technical appendix and survey report.¹⁰

Data from the third wave was published on 7th June 2018. These were published alongside two survey reports and a technical appendix.¹¹

Data from the fourth and most recent wave was published on 18th July 2019. These were published alongside a survey report and the technical details outlined here.¹²

2.2 Data quality of data sources

As specified by the Office for National Statistics, the quality of a statistical product can be defined as the “fitness for purpose” of that product.¹³ More specifically, it is the fitness for purpose with regards to the European Statistical System dimensions of quality:¹⁴ These quality dimensions focus on the following areas:

- relevance – the degree to which a statistical product meets user needs in terms of content and coverage
- accuracy and reliability – how close the estimated value in the output is to the true result
- timeliness and punctuality – the time between the date of publication and the date to which the data refers, and the time between the actual publication and the planned publication of a statistic
- accessibility and clarity – the ease with which users can access data, and the quality and sufficiency of metadata, illustrations and accompanying advice
- coherence and comparability – the degree to which data derived from different sources or methods, but that refers to the same topic, is similar, and the degree to which data can be compared over time and domain, for example, geographic level

¹⁰ See: <https://www.gov.uk/government/publications/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

¹¹ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2017>

¹² <https://www.gov.uk/government/collections/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

¹³ <https://www.ons.gov.uk/methodology/methodologytopicsandstatisticalconcepts/qualityinofficialstatistics/qualitydefined>

¹⁴ <http://ec.europa.eu/eurostat/web/ess>

There are additional characteristics that should be considered when thinking about quality. These include output quality trade-offs, user needs and perceptions, performance cost and respondent burden, and confidentiality, transparency and security. More information on the use of these dimensions to measure statistical output quality can be found in the ONS “Guidelines for measuring statistical output quality”.¹⁵

The following sections examine each of these aspects of quality in turn.

2.3 Relevance

Relevance in this case is defined as the degree to which a statistical product meets user needs in terms of content and coverage.

The NSRB collects a broad range of data on the performance of the Exporting is GREAT campaign which is not available from other data sources. As such, it is a valuable tool in terms of understanding how effectively campaign messaging has cut through to businesses and identifying ways in which the campaign could be refined in the future.

The survey also provides a range of behavioural and attitudinal data relating to exporting. By comparing these over time, it is possible to understand how business engagement with exporting is changing. The utility of this data extends beyond campaign evaluation and also serves as a barometer allowing data users to see how engagement with exporting is developing and the types of businesses which are most likely to move into the export market.

See Section 2.12 for full details of the questionnaire content.

2.4 Completeness

The survey is primarily designed to provide robust data on £500k+ businesses, as these businesses are of central importance when it comes to driving growth in exports. As such, the survey’s representation of the total business population (including smaller companies with a turnover below £500k+) is less robust and sub-group analysis within the total population is not therefore possible.

The limitations inherent in quantitative research with businesses (whereby concerns around respondent burden and data quality mean that interviews should typically be restricted to a maximum of 20 minutes in duration) means that questionnaire content had to be accordingly restricted in scope. This is, however, a structural limitation rather than being a fault in the design of the survey and these additional information needs would be best met through additional ad hoc research projects.

¹⁵ <http://webarchive.nationalarchives.gov.uk/20160106003751/http://www.ons.gov.uk/ons/guide-method/method-quality/quality/guidelines-for-measuring-statistical-quality/index.html>

2.4.1 Geographical coverage

The NSRB is representative of registered business in the UK. Sub-national data are broken down where appropriate in the accompanying survey reports and data tabulations.

2.4.2 User needs

Users are the starting point for quality considerations and it is therefore important to take account of their needs. This aspect of quality is defined below.

DIT publishes data from NSRB with a view to encouraging a broad range of users to draw upon the data. Users of NSRB data may include ministers, policy makers and analysts within the Department for International Trade, policy makers within central government, Devolved Administrations and Local Authorities, exporting consultancy companies, non-profit organisations/charities, international statistics organisations, academia, media and the public.

The data allow users to understand how the Exporting is GREAT campaign has performed as well as providing broader information about UK registered businesses exporting attitudes and behaviours which are not available elsewhere.

As outlined in Section 2.6, the survey outputs have been designed to allow a broad range of users to draw upon the data in an accessible manner.

2.5 Accuracy and reliability

Accuracy and reliability in this case is defined as how close the estimated value in the output is to the true result. There are a number of issues to bear in mind in this respect, as outlined below.

2.5.1 Effective sample size

As discussed in Section 2.4.2, the sample was designed primarily to give a robust read of the £500k+ group and 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. As such and unless specified otherwise, all sub-group analysis in the NSRB reports is based on £500k+ businesses. Further details of the effective sample sizes for key sub-groups are included in Section 1.8.

2.5.2 Sampling method

A 2-stage sampling approach was adopted for the NSRB, using stratified random probability sampling from the IDBR to provide a base sample, and then quota sampling within this to achieve the final sample.

The use of stratified random probability sampling to provide the base sample was employed in order to remove all biases except for response bias (the likelihood of a given individual agreeing to take part in the research once contacted). This ensures that the achieved sample provides a good representation of the population of businesses.

The inclusion of quota sampling however means that this approach constitutes a less methodologically robust design than a pure 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.

The quota approach was adopted with a view to achieving the necessary number of interviews with key sub-groups in a cost-effective manner. Furthermore, the timeframes associated with a rigorous random probability approach are too long for the time-sensitive evaluation of advertising campaigns.

2.5.3 Uncertainty and bias

Recruitment for the survey was conducted with a view to avoiding skews towards exporters in the sample. The survey was introduced in terms of DIT's remit to support businesses in the UK, rather than focusing explicitly on DIT's role in driving exports. It should, however, be acknowledged that the survey's association with DIT may have meant that exporters were more inclined to participate than non-exporters.

Beyond the issue described above, it should be borne in mind that the fieldwork for Wave 1 of the NSRB was conducted in October/November 2015, while Wave 2 interviews were carried out in April/May 2016. As such, it is possible that the EU referendum campaign (which was active in the months leading up to the referendum itself on 23rd June 2016), may have impacted on trends observed between Waves 1 and 2.

Ongoing ripple effects (both positive and negative) stemming from the vote to leave the EU may also have impacted on the data collected at Waves 3 and 4.

In the absence of a counterfactual showing how respondents' views would have differed in the event that the vote to leave the EU had never taken place, it is impossible to be certain of the effect that this has had on the survey data. It should also be noted that other confounding factors, such as changes to the tone of discourse around protectionism (particularly from the US), may also have impacted on responses at Waves 3 and 4.

The survey has mitigated the lack of a counterfactual where possible, for example 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.

2.6 Timeliness and punctuality

Timeliness and punctuality is defined as the time between the date of publication and the date to which the data refers, and the time between the actual publication and the planned publication of a statistic.

The interval between the completion of fieldwork and the publication of the report is relatively short for this type of primary research undertaking. Fieldwork ended on 4th January 2019 and the full research report was published on 18th July 2019.

All releases are published in accordance with a pre-announced release timetable. In accordance with the Code of Practice for Official Statistics, releases are published at 9.30am.

2.7 Accessibility and clarity

Accessibility and clarity is defined as the ease with which users can access data, and the quality and sufficiency of metadata, illustrations and accompanying advice.

Several outputs from the NSRB are published and freely available alongside this technical report on the GOV.UK website.¹⁶

A Wave 4 survey report has been published, which provides an overview of findings from the £500k+ business population alongside more summary findings relating the total registered business population. The report is designed such that all key findings are described in the text and are therefore accessible by users who rely on screen readers. Visual content (primarily charts) has been included to give an easily understandable overview of key data. All visual content is supplemented by Alt Text to further improve accessibility.

Data tabulations are published in an Excel format, following DIT formatting conventions. Alternative accessible formats will be available upon request.

2.8 Coherence and comparability

Coherence and comparability is defined as the degree to which data derived from different sources or methods, but that refers to the same topic, is similar, and the degree to which data can be compared over time and domain, for example, geographic level.

Essentially speaking, the NSRB is a single-source data set. The large majority of the quoted data is drawn directly from the survey itself and there are not, therefore, any issues around comparability arising from drawing together disparate sets of data. The only instances where non-survey data are quoted relate to:

- Annual turnover figures which are drawn from IDBR
- Population figures for the universe of registered businesses (again drawn from IDBR)

There are no issues around coherence or comparability in these cases as IDBR data are matched directly onto the survey data set using unique IDBR serial numbers. The same applies to cases where weights were applied to IDBR data (see Section 1.7.2).

It should be noted that some of the figures quoted in this report differ from those derived from the Annual Business Survey (ABS). The ABS is the main structural business survey conducted by the Office for National Statistics (ONS). It is a key source of data used by

¹⁶ <https://www.gov.uk/government/collections/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

HM Treasury in managing economic policy and provides Official Statistics relating to the number and percentage of exporters in Great Britain. As such, it is a highly important source of data and remains the primary source used to inform government departments' understanding of fundamental exporting metrics.

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 NSRB. Foremost among 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 NSRB include all sectors (with the exception of the public sector and charities).¹⁷
- ABS respondents provide answers in the context of their reporting unit, whereas the NSRB collects data at an enterprise level.¹⁸ This means that ABS might record a smaller proportion of 'exporters' among 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 NSRB uses a Computer Assisted Telephone Interviewing (CATI) method
- The NSRB employed quotas rather than stratified random probability sampling to ensure a sufficient representation of different types of enterprise. Although the resulting data are weighted to reflect the population of IDBR this could still have an effect
- The Northern Ireland data which feeds into the ABS is collected by the Department of Finance and Personnel (DFPNI) and is run as a separate exercise to the ONS data collection for Great Britain. The NSRB is conducted as a single survey covering the UK as a whole

The ABS is based on a survey of over 60,000 reporting units while the NSRB has a sample size of circa 3,000 respondents at Waves 3 and 4 (and circa 1,400 respondents in earlier waves). Neither survey constitutes a census of UK businesses – as such, there are margins of error around the estimates that both surveys produce.

¹⁷ 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).

¹⁸ The enterprise is the smallest combination of legal units that is an organizational unit producing goods or services, which benefits from a certain degree of autonomy in decision making, especially for the allocation of its current resources. An enterprise carries out one or more activities at one or more locations. An enterprise may be a sole legal unit. The reporting unit holds the mailing address for the business and is the unit for which businesses report their survey data to ONS. In general, the reporting unit is the same as the enterprise. In some of the more complex cases, enterprises are subdivided into reporting units that correspond to KAUs, and are defined by specifying the appropriate local units from within an enterprise.

There are some issues to bear in mind when it comes to cross-wave comparisons of NSRB data, as summarised in the sections below.

2.8.1 Change to weighting approach at Waves 3 and 4

The weighting approach for the data set based on businesses with an annual turnover of £500k+ is broadly similar to that employed in previous waves and cross-wave comparisons are therefore reliable.

However, the weighting matrix for the 'all businesses' data set at Waves 3 and 4 was significantly more detailed than that used in Waves 1 and 2 when it comes to sub-divisions within the micro business category (i.e. businesses with 0-9 employees). This change in approach was enabled by the larger sample size of these later waves and means that the weighted Wave 3 and 4 data is more representative than that of earlier waves. However, this also means that trends may have been affected and a degree of caution is necessary when comparing Wave 3 and 4 figures for the total business population against earlier waves. Further detail of the weighting scheme is provided in Section 1.7.

2.8.2 Change in £500k+ turnover sub-group definition at Wave 3

In the first NSRB report, which focused on data from Waves 1 and 2, one of the key sub-groups of interest was £500k+ SME/MSBs.¹⁹

In this previous report, SMEs (Small and Medium sized Enterprises) were defined as having between 1 and 249 employees and a turnover of less than £25m. MSBs (Mid-Sized Businesses) were defined as having at least one employee and a turnover of £25m up to £500m. These definitions were developed to align with the policy focus of the Department for Business, Innovation and Skills (BIS) at that time.

For the Wave 3 and 4 reports, the equivalent group of interest was slightly amended and now constitutes **all** businesses with an annual turnover of £500k+. This is a small change which means that the new definition now incorporates the very small number of businesses which have no employees and a turnover of £500k+ (<1% of all £500k+ businesses) and businesses with a turnover of £500m+ (<2% of all £500k+ businesses). The inclusion of these extra companies in the definition will have had a minimal impact on trends and Wave 1 and 2 data have not therefore been recalculated.

Strictly speaking, the text throughout the Wave 3 and 4 reports should refer to '£500k+ SME/MSBs' when discussing the Wave 1 and 2 data, and '£500k+ businesses' when discussing the Wave 3 and Wave 4 data. However, in the interests of legibility and bearing in mind the minimal difference in these definitions, a decision has been taken to refer to this sub-group as '£500k+ businesses' for all three waves of survey data.

¹⁹ The previous report is available here:

<https://www.gov.uk/government/publications/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

2.8.3 Changes to other sub-group definitions at Waves 3 and 4

The larger sample size at Waves 3 and 4 has meant that it is possible to incorporate more specific business sectors in the reported sub-group analysis (see Section 1.10.1). As such, cross-wave comparisons with Waves 1 and 2 are not made.

Since Wave 2, DIT has adopted new company size definitions which tie up with the standard EU definition. Accordingly, the Wave 3 and 4 reports no longer refer to SMEs and MSBs and now use definitions which are driven by the number of employees in a given company, as follows:

- Micro - 0-9 employees
- Small (lower band) - 10-19 employees
- Small (upper band) - 20-49 employees
- Medium - 50-249 employees
- Large - 250+ employees

2.9 Trade-offs between Output Quality Components

Trade-offs are defined as the extent to which the research design has meant that one aspect of quality has been prioritised over another. Output quality components are not mutually exclusive in the sense that there are relationships between the factors that contribute to them. There are cases where the factors contributing to improvements with respect to one component lead to deterioration with respect to another.

The survey has always adopted a quota sampling approach rather than a more methodologically pure random probability method. The decision to adopt this sampling method was primarily driven by the need for fieldwork to be completed quickly. A random probability approach would typically require 10-12 weeks in field (if suitably high response rates are to be achieved) whereas a quota approach could be completed within 5 weeks (6 weeks including a pilot phase).

Bearing in mind the point at which the Wave 1 and Wave 3 projects were commissioned, a random probability approach could not have been completed prior to the commencement of the respective rounds of advertising activities (meaning that Waves 1 and 3 would not have served as a clean pre-campaign benchmark). Similarly, at Waves 2 and 4, there was a need to complete fieldwork quickly in order to minimise the extent to which awareness of campaign activities decayed following the end of earlier campaign activities, which again made random probability sampling less viable. Quota sampling is also more cost efficient than random probability sampling.

The other chief trade-off relates to effective base sizes. The primary focus of the survey is on businesses with a turnover of £500k+ and the survey accordingly oversamples them relative to their incidence in the total population of registered businesses. This means that the effective base size of £500k+ businesses is more robust than the effective base size for the total population of registered businesses. To mitigate this effect, the base size at Waves 3 and 4 was increased and the sample structure amended, resulting in a more robust total population data set.

2.10 Performance, cost and respondent burden

Resources must be effectively used. The desired outcome must be produced cost effectively. Respondent burden should be proportional to the needs of users and not excessive for respondents and this aspect of quality is defined accordingly.

The key survey metrics are not available elsewhere. While some survey content is duplicated from other surveys, this has been done deliberately as the information is needed to allow the necessary sub-group analysis. Furthermore, any duplication stems primarily from the Annual Business Survey and an earlier evaluation of the GREAT Britain campaign. Lead times for the ABS survey mean that even if data from duplicated questions were to be drawn directly from the ABS data set, it would not be contemporaneous with the NSRB data and would therefore be less useful for some purposes than the newly collected data. There have also been methodological changes to the ABS which mean that there has been a break in its time series data for many of the businesses which are of interest to DIT - the NSRB serves to fill some of these information gaps. Issues around the age of the available data, coupled with the fact that the survey was not a census and, as such, did not include all the companies interviewed in the NSRB, mean that it was not possible to usefully draw upon duplicated data from the GREAT Britain campaign evaluation.

In terms of respondent burden, the average interview length was 17 minutes and 34 seconds. This was a reduction from Wave 3, following concerted efforts to reduce burden by removing questions which had become less essential over time.

Issues relating to cost efficiency and the use of a quota sampling method have been addressed elsewhere in this chapter (see Sections 2.4.2 and 2.8).

2.11 Confidentiality, transparency and security

The privacy of survey respondents, the confidentiality of the information they provide and its use only for statistical purposes must be absolutely guaranteed. The department must produce and disseminate statistics respecting scientific independence and in an objective, professional, and transparent manner in which all users are treated equally. This aspect of quality encompasses all of these requirements and DIT aligns with these.

The survey was conducted by Kantar, a specialist research organisation which conforms to the ISO 27001 information security management standards as well as the MRS code of conduct and the Data Protection Act 1998. All survey data were anonymised by Kantar. All personally identifiable information was removed (e.g. company name / address / phone number / respondent name) before survey data were passed to the department. Any open-ended responses which may allow third parties to identify an individual were also removed. All published data were similarly anonymised. Data in the Wave 4 report was based on groups large enough to be non-disclosive.

Reporting of the data in main body of the survey reports is primarily descriptive and does not pass judgement on the figures. Where comments are made on campaign or policy implications, these represent the neutral opinion of the research and communications specialists at Kantar.

2.12 Questionnaires

The questionnaire which was administered at Wave 4 is shown below. The questionnaires administered at Waves 1 and 2 can be sourced from the Wave 2 technical appendix.²⁰ The Wave 3 questionnaire is available in the Wave 3 technical appendix.²¹

Q1 : INTRO : Introduction

Single coded

Good morning, my name iscalling from Kantar Public, an independent research agency. We are conducting some research for the Department for International Trade.

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 iscalling from Kantar Public, an independent research agency. We are conducting some research for the Department for International Trade.

The Department for International Trade 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

²⁰ <https://www.gov.uk/government/publications/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

²¹

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/714400/DIT_National_Survey_technical_report_Wave_3.pdf

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

The survey should take around 20 minutes. I just want to reassure you that your answers will remain confidential unless you say you are happy to share them more widely at the end of the interview. 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
 - 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)

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

Please 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

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

Q5a : We understand that your business falls into the [INSERT SECTOR FROM SAMPLE] sector? Is this correct?

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

ASK ONLY IF Q5a = 2,3

Q5b : Which sector does your business best fit into?

DO NOT READ OUT – PICK BASED ON WHAT RESPONDENT SAYS AND THEN VERIFY WITH RESPONDENT

1. AGRICULTURE, FORESTRY AND FISHING
2. MINING AND QUARRYING
3. MANUFACTURING
4. ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY
5. WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND REMEDIATION ACTIVITIES
6. CONSTRUCTION
7. WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES
8. TRANSPORTATION AND STORAGE
9. ACCOMMODATION AND FOOD SERVICE ACTIVITIES
10. INFORMATION AND COMMUNICATION
11. FINANCIAL AND INSURANCE ACTIVITIES
12. REAL ESTATE ACTIVITIES
13. PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES
14. ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES
15. PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY
16. EDUCATION
17. HUMAN HEALTH AND SOCIAL WORK ACTIVITIES
18. ARTS, ENTERTAINMENT AND RECREATION
19. OTHER SERVICE ACTIVITIES
20. ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS; UNDIFFERENTIATED GOODS- AND SERVICES-PRODUCING ACTIVITIES OF HOUSEHOLDS FOR OWN USE
21. ACTIVITIES OF EXTRATERRITORIAL ORGANISATIONS AND BODIES

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

Do you currently have customers that are based...

READ OUT. MC.

- 1 Locally, e.g. within 30 miles of your main site
- 2 Across your region
- 3 Across [TEXT SUBSTITUTION: Insert the UK nation sample group is located in]
- 4 Across the UK
- 5 Internationally
- 6 None of these
- 7 Don't know

**Exclusive*
**Exclusive*

Scripter notes: Insert relevant country at CODE 3 based on sample data.
There will be four text substitution variants: England / Scotland / Wales / Northern Ireland

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

Which of these best describes your thinking on growth?

READ OUT

Rotated

- 1 Growth is an integral part of our business plans
- 2 We intend to grow the business, but do not currently have concrete plans on how to do this
- 3 We are aiming to consolidate rather than grow the business

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

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

Q14 : EXPSTAT_ALL : Attitudes towards exporting**Matrix**

Here are two statements about exporting. Please tell me to what extent you agree or disagree with them using the following scale: agree strongly, agree slightly, neither agree nor disagree, disagree slightly, disagree strongly.

To what extent do you agree or disagree that...

Random

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(Don't know)
There is a lot of demand for British products or services around the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A lot more businesses <u>could</u> export than <u>do</u> export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 IN ENGLAND, SCOTLAND OR WALES AND 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? 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

ASK ONLY IF IN ENGLAND, SCOTLAND OR WALES AND 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?

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

ASK ONLY IF IN NORTHERN IRELAND AND Q15 : EXP =1,2,3,4,5

Q17A : EXP_EVER_NIA : Whether ever exported

Single coded

Have you ever exported any products or services to the Republic of Ireland, or elsewhere outside of the UK?

- 1 Yes, to the Republic of Ireland
- 2 Yes, elsewhere outside of the UK
- 3 Yes, both
- 4 No
- 98 Don't know

ASK ONLY IF IN NORTHERN IRELAND AND Q15 : EXP = 6,7

Q17B : EXP_EVER_NIB : Exporting status

Single coded

Are these exports to the Republic of Ireland, elsewhere outside of the UK, or both?

- 1 Republic of Ireland
- 2 Elsewhere outside of the UK
- 3 Both
- 98 Don't know

ASK ONLY IF IN NORTHERN IRELAND AND (Q17A=1,3 OR Q17B=1,3)

Q17C : EXP_EVER_ROI : Frequency of exporting

Single coded

What would you say is your frequency of exporting products or services to the Republic of Ireland?

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

ASK ONLY IF IN NORTHERN IRELAND AND (Q17A=2,3 OR Q17B=2,3)

Q17D : EXP_EVER_OS : Frequency of exporting

Single coded

What would you say is your frequency of exporting products or services elsewhere outside of the UK?

IF NECESSARY: We are now thinking about exports to countries other than 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

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
- 10 I don't believe my product/service is cost competitive in the international markets
- 8 I can't make /supply enough
- 9 Other (write in) *Open

ASK ONLY IF IN ENGLAND, SCOTLAND OR WALES AND (Q15 : EXP = 6, 7 OR Q16 : EXP_EVER_A = 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. This does not include exports of goods.

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

ASK ONLY IF IN NORTHERN IRELAND AND (Q15 : EXP = 6, 7 OR Q17A : EXP_EVER_NIA = 1, 3, 98)

Q20B1 : EXP_SERV_ROI : Exporting services

Single coded

In the past 12 months did your business export any SERVICES to the Republic of Ireland? This could include commissions, royalties and licences. This does not include exports of goods.

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

ASK ONLY IF IN NORTHERN IRELAND, AND (Q15 : EXP = 6, 7 OR Q17A : EXP_EVER_NIA = 2, 3, 98)

Q20B2 : EXP_SERV_OS : Exporting services

Single coded

In the past 12 months did your business export any SERVICES elsewhere outside of the UK? This could include commissions, royalties and licences. This does not include exports of goods.
IF NECESSARY: We are now thinking about exports to countries other than the Republic of Ireland

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

ASK ONLY IF (IN ENGLAND, SCOTLAND OR WALES AND (Q15 : EXP = 6, 7 OR Q16 : EXP_EVER_A = 2,3,4,98)) OR (IN NORTHERN IRELAND AND (Q15 : EXP = 6, 7 OR Q17A : EXP_EVER_NIA = 1, 2, 3, 98))

Q20C : Thinking about the last year or so, that is since September 2017, which of the following best describes your business' export of SERVICES? 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 We have started exporting services since September 2017

- 2 We are exporting more than we were in September 2017
- 3 We are exporting the same as we were in September 2017
- 4 We are exporting less than we were in September 2017
- 6 We have stopped exporting services since September 2017
- 7 We have never exported services
- 5 Don't know **Do not read out*

ASK ONLY IF IN ENGLAND, SCOTLAND OR WALES AND (Q15 : EXP = 6, 7 OR Q16 : EXP_EVER_A = 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. This does not include exports of services.

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

ASK ONLY IF IN NORTHERN IRELAND AND (Q15 : EXP = 6, 7 OR Q17A : EXP_EVER_NIA = 1, 3, 98)

Q23B1 : EXP_GOODS_ROI : Exporting goods

Single coded

In the past 12 months did your business export any GOODS to the Republic of Ireland? This could include commissions, royalties and licences. This does not include exports of services.

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

ASK ONLY IF IN NORTHERN IRELAND, AND (Q15 : EXP = 6, 7 OR Q17A : EXP_EVER_NIA = 2, 3, 98)

Q23B2 : EXP_GOODS_OS : Exporting goods

Single coded

In the past 12 months did your business export any GOODS elsewhere outside of the UK? This could include commissions, royalties and licences. This does not include exports of services.
IF NECESSARY: We are now thinking about exports to countries other than the Republic of Ireland

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

Q23C : Thinking about the last year or so, that is since September 2017, which of the following best describes your business' export of GOODS? 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 services.

- 1 We have started exporting goods since September 2017

- 2 We are exporting more than we were in September 2017
- 3 We are exporting the same as we were in September 2017
- 4 We are exporting less than we were in September 2017
- 6 We have stopped exporting goods since September 2017
- 7 We have never exported goods
- 5 Don't know **Do not read out*

ASK ONLY IF Q15 : EXP = 6, 7 OR Q16 : EXP_EVER_A = 2,3,4 OR
Q17A : EXP_EVER_NIA = 1, 2, 3

Q24A1: Thinking about countries that you have exported to, which of the following statements best describes the typical approach of your business to exporting? **Single coded**

- 1. We intentionally target customers in specific countries
- 2. We respond to orders from abroad when we receive them, but do not specifically target customers in other countries
- 3. Don't know

ASK IF Q24A1 = 1

Q24B1: What actions have you taken to target customers outside the UK? **Multi coded**

DO NOT READ OUT

INTERVIEWER NOTE: Services on great.gov.uk are 'Create a business profile', 'Sell online overseas', 'Find export opportunities', 'Get finance', 'Find events and visits'

- 1. Attended trade shows or other industry events
- 2. Contacted distributors outside the UK
- 3. Created a website with a country-specific address i.e. NOT a .co.uk or .com site
- 4. Built language skills within your company
- 5. Conducted search engine optimisation for a foreign language
- 6. Targeted Google ads to foreign language keywords
- 7. Made use of an online marketplace, such as Amazon/eBay etc.
- 8. Checked IP addresses of visitors to see who is coming to your site
- 9. Made use of services on great.gov.uk
- 10. Other (please specify)
- 11. Don't know

INTERVIEWER NOTE: Services on great.gov.uk are 'Create a business profile', 'sell online overseas', 'Find export opportunities', 'Get finance', 'Find events and visits'

ASK IF Q24A1 = 2

Q24C1: What actions have you taken to help foreign customers place orders with you? **Multi coded**

DO NOT READ OUT

1. Allowed payment using foreign currencies for customers who purchase online
2. Adapted your website in other ways, such as allowing foreign delivery addresses
3. Anything else (please specify)
4. Nothing
5. Don't know

ASK ONLY IF Q15 : EXP = 6, 7 OR Q16 : EXP_EVER_A = 2,3,4 OR
Q17A : EXP_EVER_NIA = 1, 2, 3

Q25A : Which, if any, of the following countries have you exported to over the past five years?

READ OUT

1. USA
2. Australia
3. China
4. New Zealand
5. None of these
6. Don't know

SCRIPTER NOTES: Script list using multiple columns.

ASK ONLY IF (Q15 : EXP = 6, 7 OR Q16 : EXP_EVER_A = 2,3,4 OR
Q17A : EXP_EVER_NIA = 1, 2, 3) AND NOT (Q25A = 1 AND 2 AND 3 AND 4)

Q25B : Which, if any, of the following countries have you seriously considered exporting to over the past five years, but decided against?

1. USA
2. Australia
3. China
4. New Zealand
5. None of these
6. Don't know

SCRIPTER NOTES: Only display those countries which were NOT mentioned at Q25A

ASK IF (Q23=1 OR Q23B1=1 OR Q23B2=1) AND (Q25A = 1,2,3,4, OR Q25B – 1,2,3,4)

Q25C1 : Which, if any, of the following were the main barriers that cost [TEXT SUB IF COUNTRY SELECTED IN LOGIC BELOW WAS FROM 25B: , or would have ended up costing,] your organisation time, money or other resources when you [TEXT SUB IF COUNTRY SELECTED IN LOGIC BELOW WAS FROM 25B: considered exporting **goods** to][TEXT SUB IF COUNTRY SELECTED IN LOGIC BELOW WAS FROM 25A: exported **goods** to] [TEXT SUB: select country name based on logic specified below] in the past five years? **Multi coded**

READ OUT

1. Barriers related to product or production processes e.g. technical requirements imposed on end products
2. Barriers related to customs procedures e.g. burdens related to compliance with regulations
3. Barriers related to business conditions abroad
4. [DO NOT READ OUT] Was not exporting **goods** to this country
5. None of these

SCRIPTER NOTES - FOR THE COUNTRY TEXT SUBSTITUTION, THERE IS A HIERARCHY FOR THE SELECTION AS FOLLOWS:

IF Q25B = 1,2,3,4 THEN RANDOMLY SELECT ONE OF THE COUNTRIES CODED AT THIS QUESTION

IF Q25B = 5,6 AND Q25A = 1,2,3,4 THEN RANDOMLY SELECT ONE OF THE COUNTRIES CODED AT Q25A

IF (Q25B = 5,6 AND Q25A = 5,6) THEN SKIP QUESTION

ASK IF Q25C1 = 1

Q25C2 And what were the specific issues that you had with barriers related to product or production processes e.g. technical requirements imposed on end products?

Multi coded

DO NOT READ OUT

1. Requirements on labelling or packaging
2. Requirements to meet product standards
3. Requirements on safety or quality regulations
4. Human, animal or plant health requirements or restrictions
5. Environmental regulations
6. Restrictions on accessing raw materials
7. Something else [specify]
8. Don't know
9. Nothing

ASK IF Q25C1 = 2

Q25C3 And what were the specific issues that you had with barriers related to customs procedures e.g. burdens related to compliance with regulations?

Multi coded

DO NOT READ OUT

1. Document requirements e.g. product registration/certification/rules of origin certification/administrative burdens
2. Testing /inspection requirements
3. Lack of information and guidance on procedures
4. Delays at the border
5. Tight deadlines to complete procedural steps
6. Payments/fees for documents and inspections
7. Something else [specify]
8. Don't know
9. Nothing

ASK IF Q25C1 = 3

Q25C4 And what were the specific issues that you had with barriers related to business conditions abroad?
Multi coded

DO NOT READ OUT

1. Export volume limits e.g. quotas
2. Restrictions on access to public procurement (e.g. practices/rules give preference to domestic suppliers)
3. Lack of competitive market in partner country / favours domestic suppliers more
4. Problems with lack of intellectual property rights
5. Corruption/lack of transparency of how laws are enforced
6. Requirements to invest in local assets, use local components or train local workers
7. Visa costs or difficulties
8. Something else [specify]
9. Don't know
10. Nothing

ASK IF (Q20=1 OR Q20B1=1 OR Q20B2=1) AND (Q25A = 1,2,3,4, OR Q25B – 1,2,3,4)

Q25C5 : Which, if any, of the following were the main barriers that cost [TEXT SUB IF COUNTRY SELECTED IN LOGIC BELOW WAS FROM 25B: , or would have ended up costing,] your organisation time, money or other resources when you [TEXT SUB IF COUNTRY SELECTED IN LOGIC BELOW WAS FROM 25B: considered exporting **services** to][TEXT SUB IF COUNTRY SELECTED IN LOGIC BELOW WAS FROM 25A: exported **services** to] [TEXT SUB: select country name based on logic specified below] in the past five years?
Multi coded

READ OUT

1. Barriers related to conditions for the supply of services abroad e.g. regulatory requirements
2. Barriers related to administrative costs, burdens and regulations abroad
3. Barriers related to the different treatment of domestic and foreign businesses
4. [DO NOT READ OUT] Was not exporting **services** to this country
5. None of these

SCRIPTER NOTES - FOR THE COUNTRY TEXT SUBSTITUTION, THERE IS A HIERARCHY FOR THE SELECTION AS FOLLOWS:

IF Q25B = 1,2,3,4 THEN RANDOMLY SELECT ONE OF THE COUNTRIES CODED AT THIS QUESTION

IF Q25B = 5,6 AND Q25A = 1,2,3,4 THEN RANDOMLY SELECT ONE OF THE COUNTRIES CODED AT Q25A

IF (Q25B = 5,6 AND Q25A = 5,6) THEN SKIP QUESTION

ASK IF Q25C5 = 1

Q25C6 And what were the specific issues that you had with barriers related to conditions for the supply of services abroad e.g. regulatory requirements?

Multi coded

DO NOT READ OUT

1. Barriers related to licences and permits
2. Re-taking professional qualifications
3. Lack of transparency or high cost of local regulations or standards
4. Requirements related to local content of a service
5. Requirements on nationality of business owners
6. Something else [specify]
7. Don't know
8. Nothing

ASK IF Q25C5 = 2

Q25C7 And what were the specific issues that you had with barriers related to administrative costs, burdens and regulations abroad?

Multi coded

DO NOT READ OUT

1. Restrictive and costly start-up procedures e.g. complexity of rules, fees
2. Burdens such as inspections
3. Customs costs, procedures or import restrictions
4. Visa costs or difficulties in obtaining visas
5. Lack of enforcement of intellectual property rights
6. Lack of transparency of how local laws are enforced
7. Something else [specify]
8. Don't know
9. Nothing

ASK IF Q25C5 = 3

Q25C8 And what were the specific issues that you had with barriers related to the different treatment of domestic and foreign businesses?

Multi coded

DO NOT READ OUT

1. Practices or rules giving preference to domestic suppliers
2. Rules/state subsidies/taxes (other than tariffs) which favour domestic over foreign firms
3. Legal minimum / maximum prices for specific services
4. Enforcement or lack of enforcement of competition rules
5. Requirements to invest in local assets, use local components or train local workers
6. Restrictions on how much money you are permitted to invest in the foreign market
7. Something else [specify]
8. Don't know
9. Nothing

ASK ONLY IF Q20C: EXP=4,6 OR Q23C: EXP=4,6

Q26 : Stopping Exporting

Open

You mentioned earlier that you have reduced your exporting or stopped exporting altogether over the past year or so. What would you say was the main reason that you stopped or reduced your exporting?

98 Refused

**Exclusive *Position fixed*

ASK ONLY IF Q15 : EXP=4,5 AND NOT (Q20 = 1 OR Q20B1 = 1 OR Q20B2 = 1 OR Q23 = 1 OR Q23B1 = 1 OR Q23B2 = 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
CLARIFY WHEN THEY NEXT EXPECT TO EXPORT AND CODE ACCORDINGLY

- 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 = 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
- 13 Great.gov.uk
- 7 UKTI
- 12 Department for International Trade (DIT)
- 8 Other Government body
- 14 UK Export Finance
- 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

Q30 : EXP_KNOW : Knowledge of exporting

Matrix

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...

	0	1	2	3	4	5	6	7	8	9	10
Your current knowledge about HOW to export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Where to go for INFORMATION about exporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Where to go for HELP AND SUPPORT with exporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ASK ONLY IF not Q18 : EXP_POSSIBLE=1

Q31 : EXP_STAT : Agreement with exporting statements

Matrix

I am now going to read out some statements made by people in businesses like yours and for each one we would like you to tell us to what extent you agree or disagree with the statements. Please use the following scale: agree strongly, agree slightly, neither agree nor disagree, disagree slightly, disagree strongly.

To what extent do you agree or disagree that...

Random

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(Don't know)
International growth is an exciting prospect for my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More and more businesses like mine are starting to export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is a lot of support available to help small and medium businesses start exporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is a lot of opportunity for my business to grow internationally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being a successful exporter is something to be proud of	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are too many risks in taking a business international	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There would not be enough demand for my business overseas to make it worthwhile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exporting would give my business the opportunity for higher or faster growth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ASK ONLY IF not Q18 : EXP_POSSIBLE=1

Q31a : Thinking about your business' ability to start or continue exporting, would you say that your business has enough of each of the following to focus on exporting:

	Yes	No	Don't know
Managerial time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff capacity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capability to assess international competition for your product or service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capability to assess the cost of exporting (costing products, taxes, transport etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capability to undertake a market research study	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capability to develop an export business plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ASK ONLY IF Q15 : EXP = 6, 7 OR Q16 : EXP_EVER_A = 2,3,4 OR
Q17A : EXP_EVER_NIA = 1, 2, 3

Q32A : Over the past five years, has your business ever hired an export services organisation to help you export?

IF REQUIRED: An export services organisation would provide export related services to a business for a fee. This can range from managing overseas distributors, promoting clients' products internationally, shipping or preparing legal documentation.

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

ASK ONLY IF Q32A = 1

Q32B : How easy or difficult was it for you to identify an appropriate organisation to help with the exporting activities of your business? **SINGLE CODE**

1. Very easy
2. Quite easy
3. Neither easy or difficult
4. Quite difficult
5. Very difficult
6. Don't know
7. Prefer not to say

ASK ONLY IF Q32A = 1

Q32C : Which export services has your business paid for?
DO NOT READ OUT

MULTI CODE

1. Market intelligence/research
2. Distribution
3. Warehousing
4. Shipping/haulage
5. Marketing and promotion
6. Packaging design
7. Financial assistance/advice
8. Legal assistance/advice
9. Other (specify)
10. Don't know

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 ALL

Q34a : ADV_EXP_A : Who would talk to for exporting advice

Multi coded

And where, if anywhere, would you go if you needed exporting support or advice?

DO NOT READ OUT. MC

- 1 Department for International Trade (DIT)
- 2 UK Trade and Investment (UKTI)
- 3 UK Export Finance / Export Finance manager at UK Export Finance
- 4 HMRC
- 5 UK Government Department / Agency (general)
- 6 UK Government body based in overseas market
- 7 British Trade Association
- 8 European Trade Association
- 9 European government
- 10 Consultancy firm
- 11 Legal firm
- 12 Distributors
- 13 A bank
- 14 Other businesses which have experience of exporting
- 17 Chambers of commerce
- 18 DTI
- 19 Google/online search
- 20 Wouldn't want to find out more about exporting
- 15 Other **specify*
- 16 Don't know

ASK ONLY IF not Q34a : ADV_EXP_A=20 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

Q39 : AD_AWARE : Awareness of advertising

Single coded

In the last year or so, since September 2017, have you seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting?

- 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 LinkedIn
- 14 Twitter
- 15 Facebook
- 29 Instagram
- 16 Other social networking sites
- 30 Gmail
- 31 Search engine/Google/Bing
- 17 On Exporting is GREAT website
- 27 Great.gov.uk website
- 28 UK Export Finance website
- 18 On another website (WRITE IN WHICH)
- 19 Advertising on the internet
- 20 Marketing email
- 21 Marketing telephone call
- 22 At an event
- 23 Poster/billboard
- 32 Screens in public places
- 24 Accountant / business advisor
- 25 Word of mouth
- 26 Other, namely...
- 98 Don't know

*Open

*Open *Position fixed
*Exclusive *Position fixed

ASK ONLY IF Q39 : AD_AWARE=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 / Exporting is 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)
19. Department for International Trade (DIT)
17. DTI
18. Brexit-related coverage with no specific source
15. Other (SPECIFY)
16. Can't remember (**FIX AT END; SINGLE CODE**)

AD4A : Have you ever heard of or visited the Exporting is Great site at great.gov.uk?

DO NOT READ OUT. PROBE AS NECESSARY, SC

1. Yes – visited
2. Yes - heard of but not visited
3. No - not heard of or visited
4. Don't know

ASK IF HAVE INTERNET ACCESS (QN1 = 1). OTHERS SKIP TO T3

AD5 : For the next few questions I'd like you to look at look at some images and video clips on a website. Could you open your browser and type in the following website address? It is <http://ktds.kantar.com/EIG>

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 : Please now click on the 'Next' button. You should see a heading saying 'Screen 1'. Below this heading are images from a range of video adverts. These adverts involved different UK businesses talking about their experiences of exporting, or giving tips about exporting. The ads ended with the images that you are being shown. Please scroll down and when you have seen all of the images I'd like you to tell me whether you have seen any of these video adverts on TV, social media, online or on screens in public places in the past year or so. IF NECESSARY AT END OF VIDEO CLIP: Had you seen any of these video ads on TV, social media, online or on screens in public places in the past year or so?

IF NECESSARY: since September last year

MULTICODE.

Yes – had seen on TV	1
Yes – had seen on social media e.g. Twitter / Facebook / Instagram	2
Yes – had seen online	3
Yes – had seen on screens in public places	4
Yes - but I don't know where	5
No – had not seen video ad before	6
Respondent could not view images on website	7
Don't know	8

ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)

AD7 : Now please click the 'Next' button to move to Screen 2. This time you will need to 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, including on digital radio, in the past year or so. Again, there were a range of radio adverts in the campaign and they involved businesses talking about

their experiences of exporting, or giving tips about exporting. The ads ended with a line where the business owners said 'If we can you can'.

IF NECESSARY: Since September last year

IF NECESSARY AT END OF AUDIO CLIP: Had you heard this radio ad, or one in a similar style, in the past year?

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 Screen 3. The advertising campaign also involved a number of still adverts on posters and billboards, on social media, digital radio and online. Please scroll down and tell me where, if anywhere, have you seen any of these adverts, or ones in a similar style, in the past year or so?

IF NECESSARY: Since September last year

MULTICODE

As online adverts on a website	1
On social media e.g. Twitter / Facebook / Instagram	2
Digital radio	3
On a billboard or poster in a public place	4
Somewhere else (specify...)	5
I have seen these ads but I don't know where	6
I have not seen these ads	7
Respondent could not view images on website	8
Don't know	9

ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)

AD9 : Please click 'Next' again to move to Screen 4. Before today, had you ever seen the logo on this screen before?

IF NECESSARY: Since September last year

Yes	1
No	2
Respondent could not view image on website	3
Don't know	4

ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)

AD9b : And lastly, please click 'Next' to move to Screen 5. Before today had you seen any of the newspaper or magazine coverage of exporting shown on this screen?

1. Yes
2. No
3. Respondent could not view images on website
4. Don't know

**ASK IF RESPONDENT CAN ACCESS WEBSITE AND DID NOT SAY 'COULD NOT SEE ADS
ONSCREEN AT ALL OF QUESTIONS AD6-AD8: (AD5 = 1) AND NOT (AD6 = 7 AND AD7 = 3
AND AD8 = 8)**

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 don't think the government would be much help with this	6
General barriers to exporting (too risky, difficult, etc)	15
Other (specify)	13
Don't know	14

ASK IF 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 = 7 AND AD7 = 3
AND AD8 = 8)

AD 16 : Thinking about these adverts, please tell me to what extent you agree or disagree with each of the following statements.

	Agree strongly	Agree slightly	Disagree slightly	Disagree strongly	Don't know
The advertising is relevant to you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The advertising told you something new	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This advertising stands out from other advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This advertising is clear and easy to understand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You trust the information given by these adverts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ASK IF RECOGNISED ANY EXPORTING IS GREAT AD OR PRESS (AD6 = 1-5OR AD7 = 1 OR
AD8 = 1-6 OR AD9B = 1)

AD13 : As a result of seeing or hearing these adverts or press coverage 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
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. Phone or visited Department for International Trade (DIT) (including applying for export opportunity)
8. Phoned or visited Chambers of Commerce
9. Phoned or visited one of the official partners of Exporting is GREAT
10. Phoned or visited Foreign and Commonwealth Office
22. Phoned or visited UK Export Finance
11. 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

12. Assessed company's current readiness to export e.g. looked at staffing/resources costs/sales literature or export pricing
13. Visited Great.gov.uk
14. 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
15. Researched other aspects of an overseas market e.g. researched demand, competitors, customers, distribution channels, promotion or visited the country
16. 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
- 20 Reviewed internal performance
- 21 Reviewed / increased competitiveness with a view to start exporting
17. Something else (specify)
18. Done nothing/nothing done
19. (Don't know)

ASK IF THERE IS A CHANCE THEY WILL START EXPORTING IN THE FUTURE AND THEY RECOGNISED ANY EXPORTING IS GREAT AD OR PRESS (Q27 = 1 OR 2) AND (AD6 = 1-5 OR AD7 = 1 OR AD8 = 1-6 OR AD9B = 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 or press coverage 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 OR EXPORT MORE SINCE SEPTEMBER 2017 AND AWARE OF ADS OR PRESS:

IF ((Q20C = 1 OR 2) OR (Q23C = 1 OR 2)) AND (AD6 = 1-5OR AD7 = 1 OR AD8 = 1-6 OR AD9B = 1)

AD15 : You mentioned earlier that you started exporting goods or services or had increased your exports over the past year or so. To what extent would you say this growth in exports was a direct result of the Exporting is GREAT adverts or press coverage that you saw before today. Would you say the advertising campaign...

1. Was 100% responsible - you definitely wouldn't be exporting more if you hadn't seen the campaign

2. Was 75% responsible – the campaign was the most important factor in growing exports, but it was something that you'd vaguely been considering beforehand
3. Was 50% responsible – you were already thinking about growing exports, but the campaign still played an important role in raising your interest
4. Was 25% responsible – you were already thinking seriously about growing exports and the campaign only played a small part in your decision
5. The campaign had no real impact at all on your export growth

Q40A : Export value

Single coded

Not back

Moving to a different topic now, thinking about UK exports over the next 5 years or so, do you think that the total value of exports by UK businesses will...

READ OUT

Normal

- 1 Increase substantially
- 2 Increase a little
- 3 Stay about the same
- 4 Decrease a little
- 5 Decrease substantially
- 6 Don't know

SCRIPTER: INVERT SCALE TO HALF OF SAMPLE

Q40B : Export value

Single coded

Not back

And over the next 12 months or so, do you think that the total value of exports by UK businesses will...

READ OUT

Normal

- 1 Increase substantially
- 2 Increase a little
- 3 Stay about the same
- 4 Decrease a little
- 5 Decrease substantially
- 6 Don't know

SCRIPTER: INVERT SCALE TO HALF OF SAMPLE

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 Q16 = 2,3 OR Q17 = 2,3 OR Q17C = 2,3 OR Q17D = 2,3 OR EXPFUT = 1

Q49 : RECONTACT : Recontact**Single coded**

If follow up research was being carried out for the Department for International Trade, would you be willing for Kantar Public to pass your name, contact details and information from this survey to the Department for International Trade or another research organisation so they could contact you within the next 2 years?

If you are recontacted there will be no obligation to take part in any further research. If you do not take part in any future research your contact details will be deleted at the end of the 2 years.

RECORD BOTH EMAIL AND TELEPHONE NUMBER IF RESPONDENT AGREES

- 1 Yes – email: enter email address
- 2 Yes – telephone: enter telephone number
- 3 No – I do not wish to participate in further research

Scripter notes: Code 3 should be single coded. Codes 1 and 2 can be multi-coded. Need to allow interviewer to enter email address and/or telephone number if codes 1 and/or 2 selected

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

Would it be possible for DIT 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 confidential. Do you give your consent for us to do this?

1 Yes

2 No

ASK ALL

Q51 : NAME : Respondent's name**Open**

And can I please take your name?

IF QUERIED: This is to allow our quality assurance team to validate that the interview with you today was conducted correctly. If you gave permission for us to contact you about further research, your name will also be used for that. Your name will not be associated with any of the answers that you have given and will remain confidential.

98 Refused

**Exclusive *Position fixed*

T4 : T4 :**Text**

On behalf of the Department for International Trade, thank you very much for your time.

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 trade policy, supporting businesses, as well as delivering an outward-looking trade diplomacy strategy.

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