



Department for
International Trade

DIT National Survey of Registered Businesses

Technical Report – Wave 5

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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 2 broad functions which support DIT's objectives. It is a strategic survey for the Department, used by policy and strategy stakeholders across government. Historically, it has also been a tool to evaluate the Exporting is Great Campaign.⁵⁷

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

- 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
- ascertain business attitudes to trade and exporting
- give information on barriers to exporting and how they might be addressed
- identify the level of business interest in, and engagement with, exporting support and advice
- highlight skills, resource and knowledge gaps among businesses

The most recent wave of the survey (Wave 5) includes several new questions designed to:

- gauge businesses understanding of the term 'exporting'
- explore the differences in the export of goods and of services
- better understand the specific issues facing businesses in Northern Ireland
- identify the barriers preventing or hindering businesses exporting
- understand businesses awareness of reduced customs tariffs
- gauge businesses knowledge of and participation in World Expo events
- find out which channels businesses use to find out about exporting and industry news

Relating to its use as an evaluation tool, the events of 2020 led to the pausing of the *Exporting is GREAT* campaign. While most campaign related questions were removed from Quarter 2 onwards, some core questions about communications have remained, aiming to:

- capture awareness of information and advertising about exporting
- measure which sources of exporting publicity businesses have encountered
- measure awareness and usage of the great.gov.uk website
- measure awareness and usage of the Northern Powerhouse website

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. These 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

It is worth noting that Wave 5 introduced a new quarterly approach to the survey. This quarterly approach allowed the questionnaire design to be more flexible to DIT changes of priority and to political and current affairs which may have very significant impacts on businesses' exporting attitudes and behaviours. This flexibility meant that Quarters 1 and 2 were run individually but quarters 3 and 4 were combined in Wave 5 to accommodate policy and campaign developments within the Department. The timings of the 5 waves of interviews to date were as follows.

- Wave 1: 20 October to 6 November 2015
- Wave 2: 1 April to 4 May 2016
- Wave 3: 26 July to 7 September 2017
- Wave 4: 23 October 2018 to 4 January 2019
- Wave 5 Q1: 3 February 2020 to 20 March 2020
- Wave 5 Q2: 5 June to 10 July 2020
- Wave 5 Q3/Q4: 5 November 2020 to 14 December 2020

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.

Wave 5 Quarter 1 saw the pausing of campaign activity, which did not resume in the ensuing quarters.

1.3 Sampling

1.3.1 Sample scope

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

All private sector 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 2 main sources: the Value Added Tax (VAT) system from HMRC (Customs) and Pay As You Earn (PAYE) from HMRC (Revenue). Additional input comes from Companies House, Dun and Bradstreet and ONS business surveys. As such, the main omissions from the IDBR are very small businesses operating without VAT or PAYE schemes and some non-profit organisations. This omission of very small businesses occurs as businesses are not required to register for VAT unless they have a VAT taxable turnover of more than £85,000.

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

However, some businesses with turnovers below this threshold voluntarily choose to register for VAT.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'.

£500,000+ turnover businesses were oversampled relative to their true proportion in the population of businesses, reflecting the targeting of the *Exporting is GREAT* campaign. This allowed for more robust sub-group analysis when examining the £500,000+ businesses which are the primary focus of this report. However, this sampling approach has limited the analysis of the total sample of all businesses. The weighting scheme required to compensate for the smaller proportion of lower turnover businesses results in a lower effective base size and larger margins of error around the all-business estimates. 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. This allowed for more robust comparisons between the nations of the United Kingdom.

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. All records without a valid original telephone were sent for automatic lookup and 10,000 records were selected for manual lookup. The manual selection was stratified on employee size band shown below:

Employee Size Band:

- 0 employees
- 1 to 4 employees (IDBR 1 to 4)
- 5 to 9 employees (IDBR 5 to 9)
- 10 to 49 employees (IDBR 10 to 49)
- 50 to 99 employees (IDBR 50 to 99)
- 100 to 249 employees (IDBR 100 to 249)

Figure 1.2 outlines the return of the 2 lookup processes before validation, the manual lookups returned a higher proportion of telephone numbers compared to the automatic lookups. The results were validated before use by checking the length of the number returned and for duplicates. 35% of the total sample had usable telephone numbers after the lookup process. The final usable totals are seen in Figure 1.3.

Figure 1.2: Lookup results before validation

Category of sample	Number of records	Received/returned with useable number	Percentage with useable number
Original received	220,010	42,281	19%
Sent for automatic look up	177,729	30,929	17%
Sent for manual look up	10,000	4,640	46%

Figure 1.3: Lookup results after validation

Category of sample	Number of records	Received/returned with useable number	Percentage with useable number
Original received	220,010	42,281	19%
Sent for automatic look up	177,729	30,927	17%
Sent for manual look up	10,000	4,508	45%
Overall	220,010	77,716	35%

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 disproportionate stratified random probability approach was used when the sample was drawn. Variables used in sample stratification are shown below in Figure 1.4.

Figure 1.4: Sample stratification variables

Variables used in the sample stratification	
Type/Size of Business	<£500,000 turnover with 0 employees
Type/Size of Business	<£500,000 turnover with 1 to 2 employees
Type/Size of Business	<£500,000 turnover with 3 to 4 employees
Type/Size of Business	<£500,000 turnover with 5 to 9 employees
Type/Size of Business	<£500,000 turnover with 10 or more employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 0 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 1 to 4 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 5 to 9 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 10 to 19 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 20 to 49 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 50 to 99 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 100 to 249 employees
Type/Size of Business	£25m to £499,999,999 turnover with 0 employees
Type/Size of Business	£25m to £499,999,999 turnover with 1 to 19 employees
Type/Size of Business	£25m to £499,999,999 turnover with 20 to 49 employees
Type/Size of Business	£25m to £499,999,999 turnover with 50 to 249 employees
Type/Size of Business	£500m or higher turnover OR 250 or more employees
Region	England – North (GOR: North East, North West, Yorkshire & Humber)
Region	England – Midlands (GOR: East Midlands, West Midlands, East of England)
Region	England – South (GOR: South East, South West, London)
Region	Scotland
Region	Wales
Region	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 4. The quotas were chosen to ensure that a robust sample of £500,000+ businesses was achieved. Figure 1.5 shows how the achieved number of interviews in each group varied from the target, and figure 1.6 shows this difference by quarter. There was minimal difference between the quota target and interviews achieved between the company type/size and the region. Wave 5 placed quotas on interviews in Scotland, Wales and Northern Ireland to ensure a minimum of 200 interviews in each, a process that was first implemented at Wave 4.

It should be noted that interviews achieved for some quotas are greater than the quota target. This is explained by the need to be flexible during fieldwork to ensure that the required number of interviews for other quotas are achieved. Alternatively, on occasion 2 interviews may start at the same time and therefore push the quota achieved over the target.

Figure 1.5: Wave 5 quota targets compared to achieved interviews

Company type/size	Quota target	Interviews achieved
£500,000+ SMEs (Have employees and with a turnover £500,000 up to £25m)	1,716	1,798
MSBs and Large businesses (Have employees and a turnover of £25m or higher)	452	341
Others within IDBR universe (No employees OR those with a turnover below £500,000)	832	863
Region	Quota target	Interviews achieved
England	2,400	2,393
Scotland	200	201
Wales	200	202
Northern Ireland	200	206

Figure 1.6: Wave 5 quota targets compared to achieved interviews by Quarters

Company type/size	Quarterly quota target	Quarterly interviews achieved
£500,000+ SMEs (Have employees and with a turnover £500,000 up to £25m)	429	Q1: 429 Q2: 461 Q3/Q4: 908
MSBs and Large businesses (Have employees and a turnover of £25m or higher)	113	Q1: 113 Q2: 82 Q3/Q4: 146
Others within IDBR universe (No employees OR those with a turnover below £500,000)	208	Q1: 208 Q2: 208 Q3/Q4: 447
Region	Quarterly quota target	Quarterly interviews achieved
England	600	Q1: 600 Q2: 595 Q3/Q4: 1198
Scotland	50	Q1: 50 Q2: 52 Q3/Q4: 99
Wales	50	Q1: 50 Q2: 52 Q3/Q4: 100
Northern Ireland	50	Q1: 50 Q2: 52 Q3/Q4: 104

1.4 Questionnaire design

Wave 5 introduced a new quarterly approach to the survey design. This approach enabled the questionnaire design to be revisited every quarter to accommodate new DIT priorities, including changes necessary from COVID-19. The core design of the questionnaire continued to be drawn from earlier waves of the NSRB to ensure comparability between the waves. Kantar worked closely with DIT to develop a number of new questions for inclusion at Wave 5. Cognitive interviews were carried out in December 2019 with 10 businesses to test and refine new questions before going into field. 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.

1.4.1 Segmentation design

Based on their exporting behaviours and potential, businesses are assigned to one of 4 segments:

- **Sustain.** Those who have exported within the last 12 months
- **Reassure.** Those who have exported, but not within the last 12 months
- **Promote.** Those who have never exported, but their product is suitable / could be developed
- **Challenge.** Those who have never exported and their product is unsuitable

For Wave 5, some amendments were made to the questions used to define these segments. The aim was to improve the accuracy of the questionnaire, and to reduce the number of questions and cognitive burden on participants. The exercise also substantially reduced the numbers of businesses unallocated to a segment whilst keeping proportion in each segment the same. These question amendments were informed by the 10 cognitive interviews in December 2019 with businesses before going into field. Further, to provide confidence that the segmentation remained comparable with previous waves, a short survey was run by Kantar to compare the old questions with the new.

DIT also decided, in consultation with Kantar, that there would be benefits from refining the segmentation definitions and a new set of questions to allocate businesses to each of the 4 segments was therefore devised.

Segmentation questions

DIT and Kantar saw room to improve the questions used to define the segments between Waves 1 and 4 (the 'legacy' questions) for 3 main reasons:

- to reduce the length and complexity of the questionnaire overall, increasing completion rates and scope to add new questions
- to improve consistency of responses and reduce the scope for businesses to provide contradictory answers
- to reduce the number of businesses who were unassigned to any segment

The questions introduced at Wave 5 are more clearly focused on exporting **behaviours** and accordingly reduce the risk that **attitudes** towards exporting may influence the final segment allocation of each business. The tighter focus on very specific exporting behaviours also means that there is less scope for businesses to be uncertain about which response category best applies to them, in turn reducing the number of 'Don't know' or contradictory responses. And the current questions all have relatively concise response lists, making them faster and easier for interviewers to administer than some of the longer legacy questions.

To confirm how the Wave 4 legacy segmentation questions performed against the current ones introduced for Wave 5, DIT commissioned Kantar to test the 2 sets of questions with businesses and provide the results in time for Q2 of the main survey.

Method

In order to compare the results of the legacy and current segmentation questions, Kantar ran 2 comparable 5 minute surveys with businesses. The approach was designed to be similar as possible to the approach of the main survey. DIT drew records from the Inter-Departmental Business Register. Kantar then matched telephone numbers to the records automatically and created 2 samples of 9,000 records with matching compositions in terms of number of employees per business. Kantar commenced the telephone fieldwork on 17 February 2020 and closed on 18 March 2020. The survey containing the current questions had 750 responses and the survey containing the legacy questions had slightly more at 800.

The resulting data were weighted to reflect the composition of businesses in the UK by region, sector, turnover and number of employees.

In common with the main NSRB survey, the sample was deliberately skewed towards businesses with an annual turnover of £500,000+ (reflecting the fact that these businesses typically have a greater exporting potential than smaller businesses). As such, 2 separate weighted data sets were produced: one based on all registered businesses; and the other based only on £500,000+ turnover businesses. Given the deliberate skew towards larger businesses, the weights applied to the 'all businesses' data were unavoidably heavy, reducing the statistical reliability of the data. Our primary focus in this report is therefore on the more robust £500,000+ turnover data.

Results

Figure 1.7 below compares how businesses are assigned to segments using the legacy and current questions. The proportions falling into the 4 main segments are similar, especially in the more robust £500,000+ turnover group.

For the £500,000+ group, the main difference between the current and legacy questions is that far fewer businesses were unallocated to any segment using the current questions (1% compared to 9% for the legacy questions). This difference is statistically significant. This is a positive development and means that future data sets should give a more accurate indication of exporting behaviours and potential amongst the registered business population.

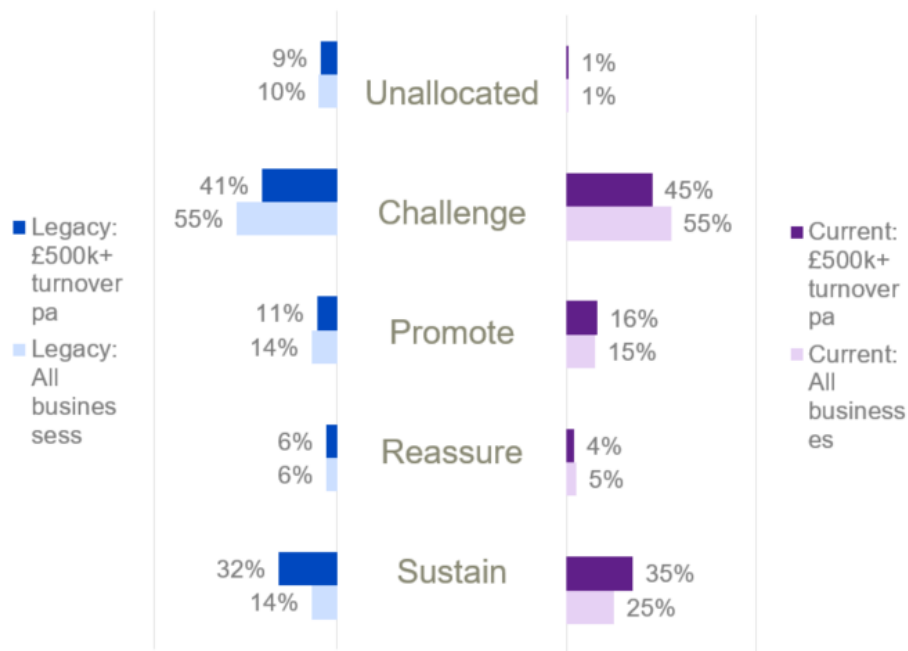
The lower proportion of unallocated businesses using the current questions was offset by directionally higher proportions in the Sustain (35% vs. 32% for the legacy questions), Challenge (16% vs. 11%) and Promote (45% vs. 41%) segments. These differences were not statistically significant.

The proportion of £500,000+ businesses falling into the Reassure segment was similar for both question sets (6% for the current questions vs. 4% for the legacy questions).

The 'all businesses' data also suggests that the current questions result in a lower proportion of unallocated businesses. Given the lower effective base size for the 'all businesses' data, more caution needs to be exercised in interpreting the data, but it does appear that the current questions also resulted in a higher proportion of businesses falling into the 'Sustain' segment.

DIT hoped that the new questions would reduce interview time. This has been the case, with the average interview length of the legacy survey being 5 minutes and 10 seconds, and the average current interview length 4 minutes and 46 seconds.

Figure 1.7: Legacy vs. current segmentation comparison



Composite measure merging data from several variables. For further information please refer to full data sets.
 Base: All businesses (Current: Unweighted 750; Effective 158.5. Legacy: Unweighted 800; Effective 163.1)
 Base: Businesses with £500K+ turnover (Current: Unweighted 625; Effective 260.4. Legacy: Unweighted 658; Effective 264)

1.4.2 Average interview length

The average interview length at Wave 5 rose compared to Wave 4, which may partly be explained by new questions introduced to the questionnaire or by difficulties reaching businesses as they adapted to the impacts of the COVID-19 pandemic. Selected questions were removed at Q2 to reduce the interview length, although some questions related to COVID were added, the detailed changes can be found in Tables 1.1, 1.2 and 1.3. During Q3/Q4 the average interview length fell. The average length at each wave was:

- Wave 1 = 14 minutes
- Wave 2 = 18 minutes
- Wave 3 = 21 minutes
- Wave 4 = 18 minutes
- Wave 5 Q1 = 23 minutes
- Wave 5 Q2 = 23 minutes
- Wave 5 Q3/Q4 = 21 minutes

A full copy of the Wave 5 questionnaire is included in Section 2.11. Questionnaires from Waves 1 to 4 can be found in the earlier published technical appendices.³

³ Wave 1 and 2 questionnaires in technical appendix can be found at:
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/625539/FINAL_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

Wave 4 questionnaire in technical appendix can be found at:
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/82

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.

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. In addition, they 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 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
- Wave 5 = 3,001 interviews

The total sample achieved at quarter of Wave 5 was as follows:

- Wave 5 Q1 = 749 interviews
- Wave 5 Q2 = 751 interviews
- Wave 5 Q3/Q4 = 1501 interviews

The fieldwork outcomes in each wave are summarised in Figure 1.8 and 1.9. There was a lower incidence of deadwood (unusable sample) at Wave 5 compared to the previous wave. Businesses were also more willing to participate, with a lower incidence of soft refusal to participate than was seen during the previous wave.

Figure 1.8: Fieldwork outcomes

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
Total issued sample	22,614 100%	23,383 100%	44,094 100%	43,347 100%	44,537 100%
Ineligible sample					
Bad sample/deadwood (telephone number not active / company not known at number / caller ID block / duplicate number / public sector / business permanently closed)	2,206 (10%)	2,197 (9%)	6,519 (15%)	8,064 (19%)	5,457 (12%)
Total in-scope sample	20,408 100%	21,186 100%	37,575 100%	35,283 100%	39,080 100%
Completed interviews	1,405 (7%)	1,418 (7%)	2,991 (8%)	3,000 (9%)	3,001 (8%)
Hard refusal to participate (refused altogether / refused screening information / broke off during interview)	1,266 (6%)	1,320 (6%)	4,795 (13%)	3,796 (11%)	3,858 (10%)
Soft refusal to participate (repeated deferrals when contacted / claimed unavailable during fieldwork / claimed unable to participate)	636 (3%)	572 (3%)	2,462 (7%)	7,569 (21%)	3,071 (8%)
Interview abandoned (telephone line issues / IT issues)	18 (0%)	13 (0%)	128 (0%)	80 (0%)	69 (0%)
Unresolved outcomes (engaged tones / answer machines / no answer / respondent requested call back / sample not contacted / quota full)	17,083 (84%)	17,863 (84%)	27,199 (72%)	20,838 (59%)	29,081 (74%)

Figure 1.9: Fieldwork outcomes for Wave 5 Quarters

	Q1	Q2	Q3/Q4
Total issued sample	11,000 100%	11,173 100%	22,364 100%
Ineligible sample			
Bad sample/deadwood (telephone number not active / company not known at number / caller ID block / duplicate number / public sector / business permanently closed)	1,088 (10%)	1,230 (11%)	3,139 (14%)
Total in-scope sample	9,912 100%	9,943 100%	19,225 100%
Completed interviews	749 (8%)	751 (8%)	1,501 (8%)
Hard refusal to participate (refused altogether / refused screening information / broke off during interview)	843 (9%)	611 (6%)	2,404 (13%)
Soft refusal to participate (repeated deferrals when contacted / claimed unavailable during fieldwork / claimed unable to participate)	217 (2%)	366 (4%)	2,488 (13%)
Interview abandoned (telephone line issues / IT issues)	38 (0%)	2 (0%)	29 (0%)
Unresolved outcomes (engaged tones / answer machines / no answer / respondent requested call back / sample not contacted / quota full)	8,065 (81%)	8,213 (83%)	12,803 (67%)

1.7 Weighted and unweighted sample profiles

Weights were applied to ensure the survey sample 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 has been done in all previous waves of the survey, this wave of the NSRB deliberately over-sampled businesses with a turnover of £500,000+ and businesses in Wales and Northern Ireland, and the weights therefore pull these back to representative proportions in the total business population data set.

The weighting scheme has changed slightly between survey waves. Detail on how each wave of the survey has been weighted is provided below.

1.7.1 Wave 5 weights

Quarterly weights

At Wave 5, each quarter of the survey has been weighted separately. Other than this, the weighting approach used was consistent with Waves 3 and 4. The weighting approach for Wave 1 to Wave 4 can be found in the report's appendix.

The benchmark population statistics used as targets in the weighting came from IDBR (the database used to draw the sample). Each quarter of Wave 5 has been weighted to match the same population targets.

The total business population weights were applied to turnover interlocked with number of employees, region and sector (based on Standard Industry Classifications). The £500,000+ sample weights were applied to the following variables:

- region interlocked with turnover and number of employees
- sector interlocked with turnover and number of employees
- turnover interlocked with number of employees

As for Waves 3 and 4, the weighting was based on variables from the IDBR database (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).

Figure 1.10: Wave 5 weighted versus unweighted sample profile amongst the Total Business sample

Company size	Q1 Unweighted profile	Q2 Unweighted profile	Q3/Q4 Unweighted profile	Weighted profile for each quarter
Less than £500,000 turnover with 0 to 2 employees	8%	8%	8%	61%
Less than £500,000 turnover with 3 to 9 employees	7%	5%	5%	15%
Less than £500,000 turnover with 10+ employees	1%	1%	1%	2%
£500,000 to £499,999,999 turnover with 0 to 19 employees	42%	47%	48%	17%
£500,000 to £499,999,999 turnover with 2 to 49 employees	18%	19%	19%	3%
£500,000 to £499,999,999 turnover with 50 to 249 employees	20%	17%	15%	2%
£500,000 to £499,999,999 turnover with 250+ employees OR £500m+ turnover	3%	4%	3%	<0.5%
Region	Q1 Unweighted profile	Q2 Unweighted profile	Q3/Q4 Unweighted profile	Weighted profile for each quarter
South of England	36%	36%	37%	44%
Midlands	24%	25%	27%	24%
North of England	20%	19%	16%	18%
Scotland	7%	7%	7%	7%
Wales	7%	7%	7%	4%
Northern Ireland	7%	7%	7%	3%
Sector (based on SICs)	Q1 Unweighted profile	Q2 Unweighted profile	Q3/Q4 Unweighted profile	Weighted profile for each quarter
Manufacturing	15%	21%	20%	12%
Infrastructure	13%	14%	14%	19%
Distribution	33%	32%	33%	23%
Finance, Professional, Technical and Creative	19%	14%	17%	31%
Other	19%	18%	16%	16%

Figure 1.11: Wave 5 weighted versus unweighted £500,000+ sample profile (1 of 2)

Region interlocked with turnover and number of employees	Q1 Unwtd profile	Q2 Unwtd profile	Q3/Q4 Unwtd profile	Wtd profile for each quarter
North with £500,000+ turnover and 20 to 49 employees	5%	5%	4%	3%
North with £500,000+ turnover and 50 to 249 employees	7%	4%	3%	2%
North - All other with £500,000+ turnover	9%	10%	10%	14%
Midlands with £500,000+ turnover and 20 to 49 employees	5%	5%	6%	4%
Midlands with £500,000+ turnover and 50 to 249 employees	6%	5%	5%	2%
Midlands - All other with £500,000+ turnover	13%	15%	17%	20%
South with £500,000+ turnover and 20 to 49 employees	7%	9%	9%	6%
South with £500,000+ turnover and 50 to 249 employees	8%	7%	6%	3%
South - All other with £500,000+ turnover	21%	20%	21%	33%
Scotland with £500,000+ turnover and 20 to 49 employees	1%	1%	1%	1%
Scotland with £500,000+ turnover and 50 to 249 employees	1%	2%	1%	1%
Scotland - All other with £500,000+ turnover	5%	4%	4%	5%
Wales with £500,000 + turnover and 20 to 49 employees	2%	2%	2%	1%
Wales with £500,000+ turnover and 50 to 249 employees	1%	1%	1%	<0.5%
Wales - All other with £500,000+ turnover	3%	4%	4%	3%
Northern Ireland with £500,000+ turnover and 20 to 49 employees	2%	1%	1%	<0.5%
Northern Ireland with £500,000+ turnover and 50 to 249 employees	1%	1%	1%	<0.5%
Northern Ireland – All other with £500,000+ turnover	4%	4%	5%	2%

Figure 1.12: Wave 5 weighted versus unweighted £500,000+ sample profile (2 of 2)

Sector interlocked with turnover and number of employees	Q1 Unwtd profile	Q2 Unwtd profile	Q3/Q4 Unwtd profile	Wtd profile for each quarter
Manufacturing with £500,000+ turnover and 20 to 49 employees	3%	4%	5%	2%
Manufacturing with £500,000+ turnover and 50 to 249 employees	5%	5%	5%	2%
Manufacturing - All other with £500,000+ turnover	7%	12%	11%	9%
Infrastructure with £500,000+ turnover and 20 to 49 employees	3%	2%	3%	2%
Infrastructure with £500,000+ turnover and 50 to 249 employees	3%	2%	2%	1%
Infrastructure - All other with £500,000+ turnover	8%	9%	9%	16%
Distribution with £500,000+ turnover and 20 to 49 employees	8%	7%	7%	5%
Distribution with £500,000+ turnover and 50 to 249 employees	7%	4%	5%	2%
Distribution - All other with £500,000+ turnover	18%	21%	21%	22%
Financial services with £500,000+ turnover and 20 to 49 employees	4%	3%	3%	3%
Financial services with £500,000+ turnover and 50 to 249 employees	3%	3%	2%	2%
Financial services - All other with £500,000+ turnover	10%	8%	10%	14%
Other with £500,000+ turnover and 20 to 49 employees	4%	6%	4%	4%
Other with £500,000+ turnover and 50 to 249 employees	6%	5%	4%	2%
Other - All other with £500,000+ turnover	11%	8%	9%	15%

Turnover interlocked with number of employees	Q1 Unwtd profile	Q2 Unwtd profile	Q3/Q4 Unwtd profile	Wtd profile for each quarter
£500,000 to £24,999,999 turnover with 0 to 4 employees	18%	23%	24%	27%
£500,000 to £24,999,999 turnover with 5 to 9 employees	6%	9%	8%	24%
£500,000 to £24,999,999 turnover with 10 to 19 employees	23%	21%	23%	23%
£500,000 to £24,999,999 turnover with 20 to 49 employees	19%	20%	19%	15%
£500,000 to £24,999,999 turnover with 50 to 99 employees	10%	9%	8%	5%
£500,000 to £24,999,999 turnover with 100 to 249 employees	5%	4%	3%	2%
£25m to £499,999,999 turnover with 0 to 19 employees	3%	2%	2%	1%
£25m+ with 20 to 49 employees	3%	2%	3%	<0.5%
£25m+ with 50 to 49 employees	9%	6%	7%	1%
£500m+ with fewer than 20 or 250+ employees OR £500,000+ turnover with 250+ employees	4%	4%	3%	2%

Annual weights

Weights have also been generated to allow for analysis of the whole of Wave 5 (where the quarterly datasets have been merged). As for the quarterly data, there are separate weights to analyse (i) the total registered business population and (ii) registered businesses with a turnover of £500,000+.

These 2 annual weights have been derived from the quarterly weights. The quarterly weights have simply been re-scaled to ensure that each quarter contributes equally to the annual survey estimates. Following discussion with DIT, it was agreed that Q3/Q4 should be treated as 2 quarters (on the assumption that responses in August and September – when Q3 was initially scheduled - would have been similar to those provided in November and December – when Q3/Q4 was conducted). As such, the contribution which each quarter of data makes to the overall annual estimates is as follows:

- Wave 5 Q1 = 25%
- Wave 5 Q2 = 25%
- Wave Q3/Q4 = 50%

1.8 Effective base sizes and margins of error

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

We have applied significance testing to the data and have used this to guide our commentary in the Wave 5 NSRB report.⁴ Charts throughout the report also highlight where differences across waves or between sub-groups are sufficiently large to note.

However, due to the quota sampling method, none of the findings in this report are statistically significant in the conventional sense. By statistically significant, we mean that we are able to assume to within a stated degree of probability that findings also apply to the wider population. Strictly speaking confidence intervals and significance tests cannot be applied to quota samples, such as that employed by the NSRB, given that probabilities of selection are not truly known. Where 'significance' is referenced, this is only intended as a guide to the findings that stood out within this dataset.

Applying weights to survey 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 (increasing the size of confidence intervals). We have calculated 'effective' base sizes to quantify this effect –the ratio between the unweighted base and the effective base gives an indication of 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 – that is all significance testing has used the effective base size in the calculations rather than the unweighted base sizes.⁵⁶

⁴ 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 (for example sub-group A is more likely to respond in a certain way than sub-group B) would be found on at least 95 occasions.

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

As shown in Figure 1.13 and 1.14, the effective base size for the ‘all businesses’ group is lower than that for the SMEs/MSB group.

This was because more extensive weighting was applied 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 £500,000. 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 £500,000+ data sets⁷ exclude these smaller businesses and the variance of the weights applied is smaller, hence the comparatively larger effective base sizes.

The additional complexity of the weights employed at Waves 3, 4 and 5 accounts for the fact that the effective base size is proportionately lower than the unweighted base in these later waves.

Figure 1.13: Unweighted and effective base sizes by Wave

Base definition	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
All businesses – unweighted base	1,405	1,418	2,991	3,000	3,001
All businesses – effective base	347	405	550	635	529
£500,000+ turnover – unweighted base	1,160	1,139	2,535	2,448	2,557
£500,000+ turnover – effective base	922	909	1,617	1,319	1,457

Figure 1.14: Unweighted and effective base sizes for Wave 5 Quarters

Base definition	Q1	Q2	Q3/Q4
All businesses – unweighted base	749	751	1,501
All businesses – effective base	133	126	270
£500,000+ turnover – unweighted base	626	653	1,278
£500,000+ turnover – effective base	315	388	764

The indicative margins of error associated with the effective base sizes outlined in Figures 1.15-1.16 are summarised in Figures 1.15-1.16. As discussed above, the margins of error (also referred to as confidence intervals) around a quota sample should be viewed as an indicative approximation.

⁷ Strictly speaking the definition was £500,000+ SME/MSBs at Waves 1 and 2 rather than all £500,000+ 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

Figure 1.15: Indicative maximum 95% margins of error for each Wave

Base definition	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
All businesses – effective base	347	405	550	635	529
<i>All businesses – margin of error</i>	$\pm 5.3\%$ pts	$\pm 4.9\%$ pts	$\pm 4.2\%$ pts	$\pm 3.9\%$ pts	$\pm 4.3\%$ pts
£500,000+ turnover – effective base	922	909	1,617	1,319	1,457
<i>£500,000+ turnover – margin of error</i>	$\pm 3.2\%$ pts	$\pm 3.3\%$ pts	$\pm 2.4\%$ pts	$\pm 2.7\%$ pts	$\pm 2.6\%$ pts

Figure 1.16: Indicative maximum 95% margins of error for each Quarter of Wave 5

Base definition	Q1	Q2	Q3/Q4
All businesses – effective base	133	126	270
<i>All businesses – margin of error</i>	$\pm 8.5\%$ pts	$\pm 8.7\%$ pts	$\pm 6.0\%$ pts
£500,000+ turnover – effective base	315	388	764
<i>£500,000+ turnover – margin of error</i>	$\pm 5.5\%$ pts	$\pm 5.0\%$ pts	$\pm 3.5\%$ pts

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.

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 Sub-group definitions

1.10.1 Sector

The industry sectors referred to throughout the main survey report are defined as follows. All definitions are based on UK SIC (2007) sections.⁸ Respondents self-classified their businesses into these sectors during the survey.

Figure 1.17: 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.

Where NSRB reporting estimates the number of businesses falling into a given category (as opposed to the proportion) these estimates draw upon the number of registered businesses recorded on the IDBR. 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.

⁸ Further details are available on the ONS website: <https://www.ons.gov.uk/methodology/classificationsandstandards/ukstandardindustrialclassificationofeconomicactivities/uksic2007>

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 below:

- £500,000+ 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 to 249 employees and a turnover of £500,000+
- (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 to 249 employees and a turnover of £500,000+. Small businesses are defined as having 10 to 49 employees and a turnover of £500,000+

- (the) Sustain segment: NSRB terminology to describe current exporters, that is 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 ($p < 0.05$), albeit with the provision that strictly speaking, confidence intervals cannot be applied to quota samples.

Underlying percentage figures are rounded to the nearest whole integer (for example 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).

Five waves of data collection have been completed to date. Data from the first 2 waves were published on 5 July 2017, alongside a technical appendix and survey report.⁹

Data from the third wave was published on 7 June 2018. These were published alongside 2 survey reports and a technical appendix.¹⁰

Data from the fourth on 18 July 2019. These were published alongside a survey report and the technical details outlined here.¹¹

Data from the fifth and most recent wave was published on 16 June 2021. These were published alongside a survey report and the technical details outlined here.

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.¹² More specifically, it is the fitness for purpose with regards to the European Statistical System dimensions of quality.¹³ 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

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

⁹ See: <https://www.gov.uk/government/publications/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

¹⁰ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2017>

¹¹ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2018>

¹² <https://www.ons.gov.uk/methodology/methodologytopicsandstatisticalconcepts/qualityinofficialstatistics/qualitydefined>

¹³ <http://ec.europa.eu/eurostat/web/ess>

use of these dimensions to measure statistical output quality can be found in the ONS “Guidelines for measuring statistical output quality”.¹⁴

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.

2.3.1 Content

The survey 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.

The NSRB has historically collected 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.

See Section 2.11 for full details of the questionnaire content.

2.3.2 Completeness

The survey is primarily designed to provide robust data on £500,000+ 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 £500,000+) 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.

2.3.3 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.

2.3.4 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.

¹⁴ <http://webarchive.nationalarchives.gov.uk/20160106003751/http://www.ons.gov.uk/ons/guide-method/method-quality/quality/guidelines-for-measuring-statistical-quality/index.html>

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.

2.4 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.

2.4.1 Effective sample size

As discussed in Section 2.4.2, the sample was designed primarily to give a robust read of the £500,000+ 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 £500,000+ businesses. Further details of the effective sample sizes for key sub-groups are included in Section 1.8.

2.4.2 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 provide the achieved sample.

The inclusion of quota sampling 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 each case does not have a known probability 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 collection of policy-relevant data about exporting and evaluation of advertising metrics.

Stratified random probability sampling was employed to select the base sample. This allowed for low incidence population sub-groups of analytical interest to be oversampled. This approach also ensures that the selected sample within each stratum reflects the population of businesses.

2.4.3 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 23 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.

Wave 5 fieldwork was conducted during the COVID-19 pandemic and the EU exit transition period. Q1 fieldwork was conducted as the outbreak of COVID-19 grew and UK went into lockdown. Additionally, just prior to Q1 fieldwork beginning the UK had entered its one year EU exit transition period. During Q2 fieldwork the first local lockdown began while other restrictions began to ease in other local areas. As Q3/Q4 fieldwork took place the legislation confirming the EU exit and future trading agreements was being finalised while lockdown measures continue. Further detail about the timeline of 2020 and the fieldwork dates can be found in the main research findings report.

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.

2.5 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 14 December 2020 and the full research report was published on 16 June 2021.

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.

2.6 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.¹⁵

A Wave 5 survey report has been published, which provides an overview of findings from the £500,000+ 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.

2.7 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 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 2 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:

¹⁵ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2018>

- the ABS specifically targets sectors which account for around 2 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)¹⁶
- ABS respondents provide answers in the context of their reporting unit, whereas the NSRB collects data at an enterprise level.¹⁷ 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 methodological differences between the 2 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, 4 and 5 (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.

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

2.7.1 Change to weighting approach at Waves 3 and 4

The weighting approach for the data set based on businesses with an annual turnover of £500,000+ 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, 4 and 5 was significantly more detailed than that used in Waves 1 and 2 when it comes to sub-divisions

¹⁶ 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).

¹⁷ 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.

within the micro business category (that is businesses with 0 to 9 employees). This change in approach was enabled by the larger sample size of these later waves and means that the weighted Wave 3, 4 and 5 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, 4 and 5 figures for the total business population against earlier waves. Further detail of the weighting scheme is provided in Section 1.7.

2.7.2 Change in £500,000+ 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 £500,000+ SME/MSBs.¹⁸

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, 4 and 5 reports, the equivalent group of interest was slightly amended and now constitutes **all** businesses with an annual turnover of £500,000+. 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 £500,000+ (<1% of all £500,000+ businesses) and businesses with a turnover of £500m+ (<2% of all £500,000+ 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, 4 and 5 reports should refer to '£500,000+ SME/MSBs' when discussing the Wave 1 and 2 data, and '£500,000+ businesses' when discussing the Wave 3, Wave 4 and Wave 5 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 '£500,000+ businesses' for all 3 waves of survey data.

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

The larger sample size at Waves 3, 4 and 5 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 to 9 employees
- small (lower band) – 10 to 19 employees
- small (upper band) – 20 to 49 employees
- medium – 50 to 249 employees
- large - 250+ employees

¹⁸ 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 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 to 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. This means 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. This 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 £500,000+ 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 £500,000+ 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, 4 and 5 was increased and the sample structure amended, resulting in a more robust total population data set.

2.9 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 22 minutes and 39 seconds. This was an increase from Wave 4, despite efforts to remove inessential questions.

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).

2.10 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 (for example 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 5 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.

2.11 Questionnaires

The questionnaire which was administered at Wave 5 Quarter 1 is shown below. The questionnaires administered at Waves 1 and 2 can be sourced from the Wave 2 technical appendix.¹⁹ The Wave 3 and Wave 4 questionnaire is available in the respective reports' technical appendices.²⁰

NSRB Wave 5 Questionnaire

Q1 : INTRO : Introduction

SINGLE CODED

Good morning, my name iscalling from Kantar, 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, 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

Q2 : INTRO2 : Survey assent

SINGLE CODED

¹⁹ <https://www.gov.uk/government/publications/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

²⁰ Wave 3:

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

Wave 4:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/822673/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2018-technical-report-wave-4.pdf

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. For quality control and training purposes, this interview may be monitored or recorded and will be processed in line with our privacy policy. Only Kantar will have access to the recording.

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

QN1 [ASK ALL]

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?

Optional prompt: Is it more or less than 20?

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

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

1. 1-4
2. 5-9
3. 10-19
4. 20-49
5. 50-99
6. 100-249
7. 250 or more
8. None

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

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

Q5b : [ASK ONLY IF Q5a = 2,3]

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. MULTI CODE

- 1 Locally, for example 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

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, that is 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

Q55 :What do you understand by the term 'exporting'? (Do not read out) [MULTI]

- 1 Selling a product outside of the UK
- 2 Selling a service outside of the UK
- 3 Selling product or service outside of the UK
- 4 Shipping outside of the UK
- 5 Shipping goods or products outside of the UK
- 6 Selling to customers or clients outside of the UK
- 7 Measuring the trade of a country (trade surplus/trade deficit)
- 8 The opposite of importing products and services
- 9 Trading out of the country
- 10 Sending goods or services outside of the UK
- 11 Sending something outside of the UK
- 12 Downloading data
- 13 Don't know
- 14 Other (specify)

READ OUT

For the remainder of this questionnaire, when we refer to exporting we mean the act of selling any goods or services by a UK company to an individual or organisation based outside of the UK.

READ OUT

Goods are physical, consumable items that are exchanged/transferred between a buyer and a seller (for example computers, pens, machines and food).

Services are transactions in which knowledge, actions or skills are provided by the seller to the buyer, and no physical goods are transferred. Examples include tutoring, advice, research, delivery, hairdressing, retail, hospitality, repair & maintenance, entertainment, design and software development.

'Intangible goods', including 'digital goods' such as e-book, music streaming, etc are all classified as services. This is because the consumer doesn't own the intellectual property over the music / book, rather they're using an online platform to read or listen to it, hence it is a service.

T1 : EXPT : Intro to export section

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

Here are three 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

- a) There is a lot of demand for British products or services around the world
- b) A lot more businesses could export than do export
- c) In general, demand for British products or services around the world has decreased over the past year

- 1. Agree strongly
- 2. Agree slightly
- 3. Neither agree nor disagree
- 4. Disagree slightly
- 5. Disagree strongly
- 6. (Don't know)

Q14A: [ASK ONLY IF Q14_3 : EXPSTAT_ALL = 1 OR 2 (Agree strongly / slightly)]

You previously said that you agree that there is a reduced demand for British products or services around the world. In your opinion, what is the main factor contributing to this reduction in demand for British exports in general? [SINGLE CODE]

DO NOT READ OUT

- 1. Increased competition from other countries
- 2. Exchange rate changes
- 3. Consumers preferring to buy products from their own country
- 4. The reputation of the UK has weakened
- 5. The process of importing UK goods has become harder
- 6. Political instability in importing country or in the UK
- 7. British products and services are expensive
- 8. General tariff uncertainty
- 9. Overseas buyers prefer local supply chains
- 98 Other

Q15A_INT:

Now I'd like to ask you some questions about your business and export of **goods**.

Q15A: [ASK ONLY BUSINESSES IN ENGLAND, SCOTLAND AND WALES]

Has your business **ever** exported **goods** outside of the UK? This could include commissions, royalties and licences. This does not include export of services.

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

Q15Ai: [ASK ONLY BUSINESSES IN ENGLAND, SCOTLAND AND WALES WHO INDICATED AT Q15A THAT THEY HAVE EXPORTED GOODS (Q15A = 1)]

And has your business exported **goods** outside of the UK in the last 12 months?

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

Q15B: [ASK ONLY BUSINESSES IN NORTHERN IRELAND]

Has your business **ever** exported **goods** to the Republic of Ireland or elsewhere outside of the UK? This could include commissions, royalties and licences. This does not include export of services. [SINGLE]

1. Republic of Ireland
2. Elsewhere outside of UK
3. Both
4. Neither
98. Don't know

Q15Bi: [ASK ONLY BUSINESSES IN NORTHERN IRELAND WHO INDICATED AT Q15B THAT THEY HAVE EXPORTED GOODS (Q15B = 1, 2, 3)]

And has your business exported **goods** to the Republic of Ireland or elsewhere outside of the UK in the last 12 months? [SINGLE]

1. Republic of Ireland
2. Elsewhere outside of UK
3. Both
4. Neither
98. Don't know

Q16A: [ASK ONLY BUSINESSES IN ENGLAND, SCOTLAND AND WALES WHO INDICATED AT Q15Ai THAT THEY HAVE EXPORTED GOODS IN THE PAST 12 MONTHS (Q15Ai = 1)]

Thinking about the last 12 months or so, which of the following best describes your export of **goods**? [SINGLE]

1. We have started exporting goods for the first time
2. We are exporting more than we were
3. We are exporting the same as we were
4. We are exporting less than we were
5. We have stopped exporting goods
6. Don't know

Instruction for interviewer: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 "We are exporting more than we were".

Q16B: [ASK ONLY BUSINESSES IN NORTHERN IRELAND WHO INDICATED AT Q15Bi THAT THEY HAVE EXPORTED GOODS TO THE REPUBLIC IN THE LAST 12 MONTHS (Q15Bi = 1 OR 3)]

Thinking about the last 12 months or so, which of the following best describes your export of **goods to the Republic of Ireland**? [SINGLE]

1. We have started exporting goods for the first time
2. We are exporting more than we were
3. We are exporting the same as we were
4. We are exporting less than we were
5. We have stopped exporting goods
6. Don't know

Instruction for interviewer: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 4 "We are exporting more than we were".

Q16C : [ASK ONLY BUSINESSES IN NORTHERN IRELAND WHO INDICATED AT 15Bi THAT THEY HAVE EXPORTED GOODS ELSEWHERE OUTSIDE OF THE UK IN THE LAST 12 MONTHS (Q15Bi = 2 OR 3)]

Thinking about the last 12 months or so, which of the following best describes your export of **goods elsewhere outside of the UK**? [SINGLE]

IF NECESSARY: 'We are now thinking about exports to countries other than the Republic of Ireland'

1. We have started exporting goods for the first time
2. We are exporting more than we were
3. We are exporting the same as we were
4. We are exporting less than we were
5. We have stopped exporting goods
6. Don't know

Instruction for interviewer: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 "We are exporting more than we were".

Q17A INT:

Now I'd like to ask you some questions about your business and export of **services**.

Q17A: [ASK ONLY BUSINESSES IN ENGLAND, SCOTLAND AND WALES]

Has your business **ever** exported **services** outside of the UK? This could include commissions, royalties and licences. This does not include export of goods.

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

Q17Ai: [ASK ONLY BUSINESSES IN ENGLAND, SCOTLAND AND WALES WHICH HAVE EVER EXPORTED SERVICES [17A=1]]

And has your business exported **services** outside of the UK **in the last 12 months**?

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

Q17B: [ASK ONLY BUSINESSES IN NORTHERN IRELAND]

Has your business **ever** exported **services** to the Republic of Ireland or elsewhere outside of the UK? This could include commissions, royalties and licences. This does not include export of goods.

1. Republic of Ireland
2. Elsewhere outside of UK
3. Both
4. Neither
98. Don't know

Q17Bi: [ASK ONLY BUSINESSES IN NORTHERN IRELAND WHICH HAVE EVER EXPORTED SERVICES [17B=1,2,3]]

And has your business exported **services** to the Republic of Ireland or elsewhere outside of the UK **in the last 12 months**?

1. Republic of Ireland
2. Elsewhere outside of UK
3. Both
4. Neither
98. Don't know

Q18A: [ASK ONLY BUSINESSES IN ENGLAND, SCOTLAND AND WALES WHO INDICATED AT Q17Ai THAT THEY HAVE EXPORTED SERVICES IN THE LAST 12 MONTHS (17Ai=1)]

Thinking about the last 12 months or so, which of the following best describes your export of **services**? [SINGLE]

1. We have started exporting services for the first time
2. We are exporting more than we were
3. We are exporting the same as we were
4. We are exporting less than we were
5. We have stopped exporting services
6. Don't know

Instruction for interviewer: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 "We are exporting more than we were".

Q18B: [ASK ONLY BUSINESSES IN NORTHERN IRELAND WHO INDICATED AT Q17Bi THAT THEY HAVE EXPORTED SERVICES TO THE REPUBLIC IN THE LAST 12 MONTHS (Q17Bi = 1 OR 3)]

Thinking about the last 12 months or so, which of the following best describes your export of **services to the Republic of Ireland?** [SINGLE]

1. We have started exporting services for the first time
2. We are exporting more than we were
3. We are exporting the same as we were
4. We are exporting less than we were
5. We have stopped exporting services
6. Don't know

Instruction for interviewer: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 "We are exporting more than we were".

Q18C: [ASK ONLY BUSINESSES IN NORTHERN IRELAND WHO INDICATED THAT THEY HAVE EXPORTED Services ELSEWHERE OUTSIDE OF THE UK IN THE LAST 12 MONTHS (Q17Bi = 2 OR 3)]

Thinking about the last 12 months or so, which of the following best describes your export of **services elsewhere outside of the UK?** [SINGLE]

IF NECESSARY: 'We are now thinking about exports to countries other than the Republic of Ireland'

1. We have started exporting services for the first time
2. We are exporting more than we were
3. We are exporting the same as we were
4. We are exporting less than we were
5. We have stopped exporting services
6. Don't know

Instruction for interviewer: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 "We are exporting more than we were".

Q19a: [ASK ONLY BUSINESSES WHO INDICATED AT Q15 AND Q17 THAT THEY HAVE NEVER EXPORTED EITHER GOODS OR SERVICES (Q15A = 2 AND Q17A = 2) OR (Q15B = 4 AND Q17B = 4)]

Which of these best describes your business?

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

**Q19 : EXP_UNSUIT : Why unsuitable for exporting
[ASK ONLY IF Q19a =1]**

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, or the service is only provided by me, or I'm a one man band
2. It can only be me, or people buy my expertise
3. It's just a one-off (for example a single restaurant)
4. It's a local service or business only
5. My product or service is not transportable
6. My product or service is not unique or special enough to export
7. I don't believe people overseas would want my product or service
8. I don't believe my product or service is cost competitive in the international markets
9. It is not lawful to sell my product in some overseas markets (that is legislation required in some markets)
10. I can't make or supply enough
11. Other (write in) *Open

Q24A1: [ASK IF HAVE EVER EXPORTED: IF 15A=1 or 15B=1-3 or 17A=1 or 17B=1-3]

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

Q24B1: [ASK IF Q24A1 = 1]

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 that is 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. Added additional languages to your website (localised website)
11. Contacted local Department for International Trade office or regional team
12. Direct marketing
13. Employed sales representatives abroad
14. Other (please specify)
15. 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'

Q24C1 [ASK IF Q24A1 = 2]

What actions, if any, 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

**Q52: [ASK ONLY SUSTAIN (15Ai=1 OR 15Bi=1,2,3 OR 17Ai=1 OR 17Bi=1,2,3)
OR
REASSURE [IF (15A=1 AND 15Ai=2) OR (15B=1,2,3 AND 15Bi=4) OR (17A=1 AND 17Ai=2) OR (17B=1,2,3 AND 17Bi=4)]**

Thinking about the product you most often export, either a good or service, who is this typically purchased by? [MULTICODE]

1. A business
2. An individual
3. Charities or other non-profit organisations
4. Public bodies
98. Don't know

Q25A : ASK IF HAVE EVER EXPORTED: IF 15A=1 or 15B=1-3 or 17A=1 or 17B=1-3

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

READ OUT. ASK ALL [RANDOMISE]

1. USA
2. Australia
3. China
4. New Zealand
5. Japan
6. South Africa
7. Nigeria
8. Brazil
9. Saudi Arabia
10. United Arab Emirates (UAE)
11. The European Union
12. Any other countries or regions (DNR)
13. None of these (DNR)
98. Don't know (DNR)

Q25B : [ASK IF HAVE EVER EXPORTED: IF (15A=1 or 15B=1-3 or 17A=1 or 17B=1-3) AND NOT SELECT ALL COUNTRIES AT Q25A (1-12)]

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

ASK ALL [RANDOMISE, do not show country code to interviewer if was selected at 25A]

1. USA
2. Australia
3. China
4. New Zealand
5. Japan
6. South Africa
7. Nigeria
8. Brazil
9. Saudi Arabia
10. United Arab Emirates (UAE)
11. The European Union
12. Any other countries or regions
13. None of these
- 98.[DNR] Don't know

SHOWN TO THOSE WHO HAVE EVER EXPORTED IF (15A=1 or 15B=1-3 or 17A=1 or 17B=1-3) AND THOSE WHO HAD CONSIDERED EXPORTING TO ANY OF FIRST FOUR COUNTRIES AT 25B – USA, China, Australia, New Zealand (codes 1-4)

Now I'd like to ask you a few questions about any barriers your business faces when exporting.

SHOWN TO THOSE WHO HAVE EVER EXPORTED IF (15A=1 or 15B=1-3 or 17A=1 or 17B=1-3) AND THOSE WHO HAD CONSIDERED EXPORTING TO ANY OF FIRST FOUR COUNTRIES AT 25B – USA, China, Australia, New Zealand (codes 1-4)

Q24D: On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following when it comes to exporting to [RANDOMLY SELECT ONE OF CORE COUNTRIES MENTIONED AT Q25B]?

READ OUT. RANDOMISE ORDER SCRIPTER: DISPLAY AS DYNAMIC GRID. INCLUDE DON'T KNOW RESPONSE FOR EACH STATEMENT

1. Cost
2. Lack of knowledge
3. The capacity of your business to export and cater for international contracts, for example having the right number of people, machinery, skill levels etc.
4. Access to contacts, customers and the right networks
5. None of the above DO NOT READ OUT

SCRIPTER: IF RESPONDENT GIVES A SCORE OF 6 OR HIGHER TO MORE THAN ONE STATEMENT AT Q24D, RANDOMLY SELECT ONE OF THEM AND ROUTE RESPONDENT TO THE EQUIVALENT QUESTION AT Q24D1/2/3/4 ACCORDINGLY.

IF RESPONDENT GIVES A SCORE OF 6 OR HIGHER TO ONLY ONE STATEMENT AT Q24D, ROUTE RESPONDENT TO THE EQUIVALENT QUESTION AT Q24D1/2/3/4 ACCORDINGLY.

IF RESPONDENT DOES NOT GIVE ANY CODES AT Q24D A SCORE OF 6 OR HIGHER, SKIP TO LOGIC AT Q24xE

Q24D1: [ASK IF Q24D = 1 (COST) IS SELECTED IN THE LOGIC ABOVE]

You mentioned costs as an important barrier. Which of the following specific cost issues have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-9, 37. MULTICODE.

1. Upfront investment to explore opportunities to export, for example market research, advice, overseas travel and building networks
2. Transportation costs from the UK to the destination country
3. Distribution costs within the destination country
4. Border costs such as tariffs and customs fees
5. The cost of scaling up your business
6. Costs related to complying with standards in the destination country
7. An inability to access finance or a lack of working capital to finance exports
8. Increased financial risk
9. Exchange rate fluctuations
37. The price of your goods or services being high compared to those in the destination country
10. And was there anything else cost-related? *specify
98. Don't know DO NOT READ OUT
11. None of the above DO NOT READ OUT

Q24D2: [ASK IF Q24D = 2 (LACK OF KNOWLEDGE) IS SELECTED IN THE LOGIC ABOVE]

You mentioned lack of knowledge as an important barrier. Which of the following knowledge gaps have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-10, 14. MULTICODE.

1. Knowledge about how to organise and plan transport or distribution
2. Knowledge of tax issues
3. Knowledge of international standards which your products or services have to conform to
4. Knowledge of how to develop an export business plan
5. Knowledge of how to obtain export or import licences
6. Knowledge of customs and tariffs
7. Knowledge about competitors in overseas markets
8. Understanding overseas clients in terms of their language or culture
9. Determining how to price your product
10. Knowledge of other legal issues
14. Knowledge of which country or countries have the largest demand for my products or services'
11. 98. And was there anything else relating to knowledge gaps? *specify
Don't know DO NOT READ OUT
13. None of the above DO NOT READ OUT

Q24D3: [ASK IF Q24D = 3 (CAPACITY) IS SELECTED IN THE LOGIC ABOVE]

You mentioned capacity issues as an important barrier. Which of the following have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-9. MULTICODE

1. Not having enough managerial time to focus on internationalisation
2. Not having suitably trained staff
3. Not having enough staff to expand your operation
4. Not having the necessary machinery
5. Not having the capability to assess international competition for the product
6. Not having the capability to assess the cost of internationalisation, for example costing products, taxes, transport, etc.
7. Not having the capability to undertake a market research study
8. Not having the capability to develop an export business plan
9. And was there anything else relating to capacity issues? *specify
98. Don't know DO NOT READ OUT
10. None of the above DO NOT READ OUT

Q24D4: [ASK IF Q24D = 4 (CUSTOMER NETWORKS) IS SELECTED IN THE LOGIC ABOVE]

You mentioned access to contacts, customers and the right networks as an important barrier. Which of the following have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-6. MULTICODE.

1. Identifying opportunities to export
2. Finding overseas customers
3. Understanding who to make contact with in first instance
4. Finding logistical solutions for delivery, transport or distribution
5. Developing or nurturing critical relationships
6. Improving your profile or credibility in the country
7. And was there anything else relating to access to customers and networks? *specify
98. Don't know DO NOT READ OUT
9. None of the above DO NOT READ OUT

Q24xE: [ASK ONLY IF PRODUCT OR SERVICES COULD BE DEVELOPED FOR EXPORT (Q19a = 2) AND IF RESPONDENT HAS NOT BEEN ASKED 24D (had not considered exporting to one of the four core countries at 25B)]

On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following when it comes to exporting in general?

READ OUT. RANDOMISE ORDER SCRIPTER: DISPLAY AS DYNAMIC GRID. INCLUDE DON'T KNOW RESPONSE FOR EACH STATEMENT,

Interviewer instruction: This applies to all countries you may export to.

1. Cost
2. Lack of knowledge
3. The capacity of your business to export and cater for international contracts, for example having the right number of people, machinery, skill levels etc.
4. Access to contacts, customers and the right networks
5. None of the above DO NOT READ OUT

- 1:0
- 2:1
- 3:2
- 4:3
- 5:4
- 6:5
- 7:6
- 8:7
- 9:8
- 10:9
- 11:10
- 12: Don't know

SCRIPTER: IF RESPONDENT GIVES A SCORE OF 6 OR HIGHER TO MORE THAN ONE STATEMENT AT Q24xE, RANDOMLY SELECT ONE OF THEM AND ROUTE RESPONDENT TO THE EQUIVALENT QUESTION AT Q24xE1/2/3/4 ACCORDINGLY.

IF RESPONDENT GIVES A SCORE OF 6 OR HIGHER TO ONLY ONE STATEMENT AT Q24xE, ROUTE RESPONDENT TO THE EQUIVALENT QUESTION AT Q24xE1/2/3/4 ACCORDINGLY.

IF RESPONDENT DOES NOT GIVE ANY CODES AT Q24xE A SCORE OF 6 OR HIGHER, SKIP TO LOGIC AT Q26

Q24xE1: [ASK IF Q24xE = 1 (COST) IS SELECTED IN THE LOGIC ABOVE]

You mentioned costs as an important barrier. Which of the following specific cost issues have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-9, 13. MULTICODE.

1. Upfront investment to explore opportunities to export, for example market research, advice, overseas travel and building networks
2. Transportation costs from the UK to the destination country
3. Distribution costs within the destination country
4. Border costs such as tariffs and customs fees
5. The cost of scaling up your business
6. Costs related to complying with standards in the destination country
7. An inability to access finance or a lack of working capital to finance exports
8. Increased financial risk
9. Exchange rate fluctuations
13. The price of your goods or services being high compared to those in the destination country
10. And was there anything else cost-related? *specify
98. Don't know DO NOT READ OUT
11. None of the above DO NOT READ OUT

Q24xE2: [ASK IF Q24xE = 2 (LACK OF KNOWLEDGE) IS SELECTED IN THE LOGIC ABOVE]

You mentioned lack of knowledge as an important barrier. Which of the following knowledge gaps have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-10, 14. MULTICODE.

1. Knowledge about how to organise and plan transport or distribution
2. Knowledge of tax issues
3. Knowledge of international standards which your products or services have to conform to
4. Knowledge of how to develop an export business plan
5. Knowledge of how to obtain export or import licences
6. Knowledge of customs and tariffs
7. Knowledge about competitors in overseas markets
8. Understanding overseas clients in terms of their language or culture
9. Determining how to price your product
10. Knowledge of other legal issues
- 11
14. Knowledge of which country/countries have the largest demand for my products/services'.
15. And was there anything else relating to knowledge gaps? *specify
98. Don't know DO NOT READ OUT
13. None of the above DO NOT READ OUT

Q24xE3: ASK IF Q24xE = 3 (CAPACITY) IS SELECTED IN THE LOGIC ABOVE

You mentioned capacity issues as an important barrier. Which of the following have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-8.

1. Not having enough managerial time to focus on internationalisation
2. Not having suitably trained staff
3. Not having enough staff to expand your operation
4. Not having the necessary machinery
5. Not having the capability to assess international competition for the product
6. Not having the capability to assess the cost of internationalisation, for example costing products, taxes, transport etc.
7. Not having the capability to undertake a market research study
8. Not having the capability to develop an export business plan
9. And was there anything else relating to capacity issues? *specify
99. Don't know DO NOT READ OUT
10. None of the above DO NOT READ OUT

Q24xE4: [ASK IF Q24xE = 4 (ACCESS) IS SELECTED IN THE LOGIC ABOVE]

You mentioned access to contacts, customers and the right networks as an important barrier. Which of the following have caused you genuine difficulties or put you off exporting?

READ OUT. RANDOMISE ORDER OF CODES 1-6.

1. Identifying opportunities to export
2. Finding overseas customers
3. Understanding who to make contact with in first instance
4. Finding logistical solutions for delivery, transport or distribution
5. Developing or nurturing critical relationships
6. Improving your profile or credibility in the country
7. And was there anything else relating to access to contacts, customers and networks?
*specify
98. Don't know DO NOT READ OUT
9. None of the above DO NOT READ OUT

Q54_AwarenessOfFTAs [ASK ONLY IF NON-EU GOODS EXPORTS AT 25A (SUSTAIN AND REASSURE) IF (25A=1-10, OR 12)]

INT54: Now I have a few questions to ask you about customs duties.

READ OUT TO ALL

When two countries have a trade agreement in place they typically set reduced customs duties on certain goods. This means that businesses can export their goods to the other country and benefit from lower or zero customs duties, provided they meet certain requirements. This is instead of the higher customs duties that would be in place if the two countries did not have a trade agreement.

Thinking about the goods you most frequently export to non-EU countries, are you aware of whether they are eligible for reduced customs duties?

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

Q54a_UseOfFTAs [ASK ONLY IF Q54 = 1]

How often do the goods you most frequently export to countries outside of the EU benefit from reduced customs duties?

1. Always or almost always
2. Most of the time
3. Some of the time
4. Never or almost never
98. Don't know

Q54b_ReasonsOfFTAs [ASK ONLY IF Q54A = 3 OR 4]

1. Generally, what are the main reasons which prevent your exports from obtaining reduced customs duties? [Please select all that apply.] READ OUT
2. Our goods are eligible for preferences, but partner importers are not aware of or willing to obtain reduced customs duties
3. Difficulties complying with the requirements to make our exports eligible for preferences
4. Benefits gained from reduced customs duties do not outweigh the costs
5. Difficult finding relevant information on how to obtain reduced customs duties
6. Difficulties understanding available information on how to obtain reduced customs duties
7. I don't know [EXCLUSIVE]
8. Other (Please specify)
9. I do not encounter issues in obtaining preferences [EXCLUSIVE]

Q26 : Stopping Exporting [ASK THOSE WHO HAVE REDUCED OR STOPPED EXPORTING (16A=4,5 OR 16B=4,5 OR 16C=4,5 OR 18A=4,5 OR 18B=4,5 OR 18C=4,5 (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

Q27 : EXPORT : Exporting plans [Those who haven't exported in the past 12 months and are not unable to export [NOT (Q15Ai=1 OR Q15Bi=1-3 OR Q17Ai=1 OR Q17Bi=1-3)] AND NOT [Q19A=1]]. 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

Q27a : [ASK IF HAVE PLANS/AN ACTIVE INTEREST IN EXPORTING (Q27 = 1 OR 2)]

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: For example looked at whether the product or service can be exported or gained commitment of Directors or Board)
- 2 Assessed your company's current readiness to export (IF NECESSARY: for example looked at staffing, resources, costs, sales literature or export pricing)
- 3 Investigated the rules of doing business with a country (IF NECESSARY: for example investigated regulation and rules of doing business with the country, tax, distribution and logistics, payment options, representatives or paperwork)
- 4 Researched other aspects of an overseas market (for example researched demand, competitors, customers, distribution channels, promotion or visited the country)
- 5 Developed an export business plan (IF NECESSARY: for example 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

Q28 : EXPINSPIRE : What has encouraged you to consider exporting [ASK ONLY IF Q27 = 1,2]

Who or what has encouraged you to consider exporting?

DO NOT READ OUT. MC.

1. Business or professional contacts
2. Financial advisor or accountant or bank
3. Family and friends
4. Articles or information I saw or read (PROBE FOR SOURCE)
5. Advertisements I saw or read (PROBE FOR SOURCE)
6. Exporting is GREAT
7. Great.gov.uk
8. UKTI
9. Department for International Trade (DIT)
10. Other Government body
11. UK Export Finance
12. Northern Powerhouse, Midlands Engine or other region's government programme.
13. Nothing or no one in particular – just believe there is potential, or we are successful domestically
14. Nothing or no one in particular – just seems like a good time, or economy is sound
15. Other (specify)

Q30 : EXP_KNOW : Knowledge of exporting [ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT - IFNOT Q19a : =1]

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...

- a) Your current knowledge about HOW to export
- b) Where to go for INFORMATION about exporting
- c) Where to go for HELP AND SUPPORT with exporting

SCALE 0 to 10

Q31 : EXP_STAT [ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT - IFNOT Q19a : =1]

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

- a) International growth is an exciting prospect for my business
- b) More and more businesses like mine are starting to export
- c) There is a lot of support available to help small and medium businesses start exporting
- d) There is a lot of opportunity for my business to grow internationally
- e) Being a successful exporter is something to be proud of
- f) There are too many risks in taking a business international
- g) There would not be enough demand for my business overseas to make it worthwhile
- h) Exporting would give my business the opportunity for higher or faster growth
- i) There are enough opportunities for growth within the UK to mean my business isn't interested in exports

- 1. Agree strongly
- 2. Agree slightly
- 3. Neither agree nor disagree
- 4. Disagree slightly
- 5. Disagree strongly
- 6. (Don't know)

Q31a [ASK ONLY IF not Q19a : EXP_POSSIBLE=1]

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:

- a) Managerial time
- b) Staff capacity
- c) Capability to assess international competition for your product or service
- d) Capability to assess the cost of exporting (costing products, taxes, transport etc)
- e) Capability to undertake a market research study
- f) Capability to develop an export business plan

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

Q32A [ASK IF HAVE EVER EXPORTED: IF 15A=1 or 15B=1-3 or 17A=1 or 17B=1-3]

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

Q32B [ASK ONLY IF Q32A = 1]

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
98. Don't know
99. Prefer not to say

Q32C [ASK ONLY IF Q32A = 1]

Which export services has your business paid for?

DO NOT READ OUT

MULTI CODE

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

Q56: World Expo Knowledge [ASK ALL]

A World Expo is a large international event designed to showcase national achievements. They have also previously been known as 'world fairs', 'universal expositions' or 'international expositions'.

Which of the following statements best describes your knowledge of World Expos before today?

READ OUT, FIX POSITIONS, FLIP SCALE

- 1 I have never heard of World Expos
- 2 I have heard of World Expos, but don't know anything about them
- 3 I have heard of World Expos, and know a little about them
- 4 I have heard of World Expos, and know a lot about them
- 98 Prefer not to say (DO NOT READ OUT)

Q56A: World Expo City [ASK ONLY IF (Q56 = 2, 3, 4, 98)] SINGLE CODE

World Expos take place every five years in a different host country. The next one will take place from October this year.

Have you heard about which city is hosting the World Expo in October 2020?

DO NOT READ OUT, CODE TO LIST, PROMPT TO GIVE A CITY IF NOT GIVEN

- 1 Dubai
- 2 Shanghai
- 3 Abu Dhabi
- 4 Seoul
- 5 Milan
- 6 London
- 98 Don't know / No
- 99 Other, please specify

Q57: World Expo UK Participation [ASK ALL] Single coded

The October 2020 World Expo will include a national pavilion across a six-month programme of events, with various countries across the globe participating.

Do you know whether or not the UK is participating in the next World Expo?

READ OUT, RANDOMISE

- 1 Yes, the UK is participating in the next World Expo
- 2 No, the UK is not participating in the next World Expo
- 98 Don't know (FIX, DO NOT READ OUT)

Q58: World Expo Business participation [ASK ALL]

World Expos run a series of corporate and business events over the six-month period they take place. These are designed to facilitate networking and promotion of goods and services.

Which of the following statements best describes your business' interest in participating as a part of the UK's presence in Expo 2020 and other future World Expos?

READ OUT, FIX POSITIONS, FLIP SCALE

"Firstly, which statement best applies to your business' interest in World Expo 2020"
[SINGLE]

1. My business **is not** interested in participating
2. My business **might** be interested in participating, but I need more information
3. My business **is** interested in participating, but has yet to make preparations to do so
4. My business **is** interested in participating and has made preparations to do so
5. Don't know (FIX, DO NOT READ OUT)

"Secondly, which statement best applies to future World Expos?" [SINGLE]

1. My business **is not** interested in participating
2. My business **might** be interested in participating, but I need more information
3. My business **is** interested in participating, but has yet to make preparations to do so
4. My business **is** interested in participating and has made preparations to do so
5. Don't know (FIX, DO NOT READ OUT)

Q33INT: For the next few questions I would like to ask you about exporting advice and information.

ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT - IFNOT Q19a : =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 |

Q34a : ADV_EXP_A : Who would talk to for exporting advice [ASK ALL] Multi coded

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, or Export Finance manager at UK Export Finance
4. HMRC
5. UK Government Department or 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
15. DTI
16. Google or online search
17. Business representative organisations (for example Chambers of Commerce, Federation of Small Businesses)
18. Local authority
19. Accountancy firm
20. Wouldn't want to find out more about exporting [EXCLUSIVE]
21. Other **specify*
Don't know

ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT - IFNOT Q19a : =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 |

Q34a : ADV_EXP_A : Who would talk to for exporting advice [ASK ALL] Multi coded

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, or Export Finance manager at UK Export Finance
4. HMRC
5. UK Government Department or Agency (general)
UK Government body based in overseas market
6. British Trade Association
7. European Trade Association
8. European government
9. Consultancy firm
10. Legal firm
11. Distributors
12. A bank
13. Other businesses which have experience of exporting
14. DTI
15. Google or online search
16. Business representative organisations (for example Chambers of Commerce, Federation of Small Businesses)
17. Local authority
18. Accountancy firm
19. Wouldn't want to find out more about exporting [EXCLUSIVE]
20. Other **specify*
Don't know

Add clarification for Welsh, Scottish or Irish businesses who say 'Government' (Q34a = 5 or 6) – Welsh Assembly, Scottish Government, Government of Northern Ireland or UK Government [IF NECESSARY: 'UK Government can refer to [SCRIPT AS APPLICABLE - the Welsh Assembly / Scottish Government / the Government of Northern Ireland] or the UK Government.]

Q37 : ADVGOVT : Interest in support [ASK ONLY IF NOT Q34a : ADV_EXP_A=20 and NOT Q19a =1] 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

Q37a : Willingness to pay for support (Multicode) [ASK IF Q37 = 1 OR 2]

Ask option 1 and then go onto next option if answer quite willing or not at all willing. Same with option 2 until end of options.

How willing would your business be to use such services to assist you with exporting if they cost....

- a) A fee of £9,000
- b) A fee of £5,000
- c) A fee of £1,000
- d) Nothing at all

- 1. Very willing
- 2. Quite willing
- 3. Not at all willing

Q39: AD_AWARE : Awareness of advertising [ASK ALL] Single coded

In the last year or so, 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

AD4 : [ASK ONLY IF Q39 : AD_AWARE=1]

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 (for examples Barclays, HSBC, Lloyds Bank, RBS, Santander)
- 15. Department for International Trade (DIT)
- 17. Department for Trade and Industry (DTI)
- 18. Brexit-related coverage with no specific source
- 16. Other (SPECIFY)
- 17. Can't remember (**FIX AT END; SINGLE CODE**)

AD4A : [ASK ALL]

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

AD4B: [ASK ALL]

Have you ever heard of or visited the Northern Powerhouse site at Northernpowerhouse.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
98. Don't know

AD5 : [ASK IF HAVE INTERNET ACCESS (QN1 = 1). OTHERS SKIP TO F1]

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 <https://tinyurl.com/rh365xk>

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]

AD6 : ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)

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 and still adverts. The video involves 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 or still adverts on social media in the past year or so.

IF NECESSARY AT END OF VIDEO CLIP: Had you seen any of these video ads on social media in the past year or so?

IF NECESSARY: [needs updating between waves]: since February last year

MULTICODE.

1. Yes – had seen on Facebook
2. Yes – had seen on social media LinkedIn
3. Yes - but I don't know where
4. No – had not seen video ad before
5. Respondent could not view images on website
6. Don't know

AD7 : ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)

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 podcast trailer. When it finishes, I'd like you to tell me whether you have heard this trailer, including on digital radio, in the past year or so.

IF NECESSARY: [needs updating between waves]: Since February last year

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

1. Yes – had heard podcast trailer before
2. No – had not heard podcast trailer before
3. Respondent could not get podcast trailer to play
4. Don't know

AD8 : ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)

Again, please click the 'Next' button to move to Screen 3. This advertising campaign involved a number of 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: [needs updating between waves]: Since February last year

MULTICODE

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

AD9 : ASK IF RESPONDENT CAN ACCESS WEBSITE (AD5 = 1)

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

IF NECESSARY: [needs updating between waves]: Since February last year

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

AD10 : ASK IF RESPONDENT CAN ACCESS WEBSITE AND DID NOT SAY 'COULD NOT SEE OR HEAR ADS ONSCREEN AT ALL OF QUESTIONS AD6-AD8: (AD5 = 1) AND NOT (AD6 = 7 AND AD7 = 3 AND AD8 = 8)

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?

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

AD11: ASK IF ADS DIDN'T INCREASE INTEREST IN FINDING OUT MORE (AD10 = 2 OR 3)

Why don't these adverts increase your interest in finding out about exporting?

DO NOT PROMPT

1. Didn't like the adverts
2. Didn't understand the adverts
3. I already know all I need to know about exporting
4. I don't know enough about exporting to even consider it
5. I don't think the government would be much help with this
6. Because we don't export
7. Because I have no interest in exporting
8. Because we already export
9. General barriers to exporting (too risky, difficult, etc)
10. Other (specify)
11. Don't know

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 : 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)

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

- a) The advertising is relevant to you
 - b) The advertising told you something new
 - c) This advertising stands out from other advertising
 - d) This advertising is clear and easy to understand
 - e) You trust the information given by these adverts
-
1. Agree strongly
 2. Agree slightly
 3. Disagree slightly
 4. Disagree strongly
 5. Don't know

AD13: ASK IF RECOGNISED ANY EXPORTING IS GREAT AD OR PRESS (AD6 = 1-5 OR AD7 = 1 OR AD8 = 1-6 OR AD9B = 1)

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
11. Phoned or visited UK Export Finance
12. Done a basic assessment of your company's export potential for example looked at whether the product or service can be exported or gained commitment of Directors/Board
13. Assessed company's current readiness to export for example looked at staffing or resources costs or sales literature or export pricing
14. Visited Great.gov.uk
15. Investigated the rules of doing business with a country for example investigated regulation and rules of doing business with the country/tax/distribution and logistics/payment options/representatives/paperwork
16. Researched other aspects of an overseas market for example researched demand, competitors, customers, distribution channels, promotion or visited the country
17. Developed an export business plan for example formally planning financing, drawing up a sales and marketing plan, selecting distribution channels or developing market entry strategies
18. Reviewed internal performance
19. Reviewed or increased competitiveness with a view to start exporting
20. Something else (specify)
21. Done nothing or nothing done
22. (Don't know)

AD14 : 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)

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

AD15: [ASK IF STARTED EXPORTING OR EXPORT MORE IN THE LAST 12 MONTHS AND AWARE OF ADS OR PRESS:

IF ((16A=1 OR 2) OR (16B=1 OR 2) OR (16C=1 OR 2) OR 18A=1 OR 2) OR (18B=1 OR 2) OR (18C=1 OR 2) AND (AD6 = 1-5OR AD7 = 1 OR AD8 = 1-6 OR AD9B = 1)]

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

F1. [ASK ALL, MULTI CODE, RANDOMISE]

Which of the following channels do you use to find out about exporting or business products.

1. Business media (Bloomberg or Financial Times or Wall Street Journal or The Economist)
2. Sector or industry specific publications or magazines
3. External consultancies or sources (KPMG, PWC etc.)
4. TV advertisements
5. Radio advertisements
6. Mentors
7. Business contacts outside your organization
8. Recommendations from friends or colleagues

9. Expert advisors for example financial experts, insurance experts, bank or insurance brokers, accountants
10. Other SMEs or businesses
11. Social Media for example Twitter or Facebook
12. Websites or Internet search
13. Trade associations
14. Others, please specify_____
15. None of the above single code – fix at end
16. DK
17. None or Don't use

F2 [ASK ALL, MULTI CODE, RANDOMISE]

Which sources do you use to stay informed about your industry?

PROG: MULTICODE (EXCEPT DK/NONE)

INT: DO NOT READ/PROMPT

1. Business media (Bloomberg or Financial Times or Wall Street Journal or The Economist)
2. Sector or industry specific publications or magazines
3. External consultancies or sources (KPMG, PWC etc.)
4. TV advertisements
5. Radio advertisements
6. Mentors
7. Business contacts outside your organisation
8. Recommendations from friends or colleagues
9. Expert advisors for example financial experts, insurance experts, bank or insurance brokers, accountants
10. Other SMEs or businesses
11. Social Media for example Twitter or Facebook
12. Websites or Internet search
13. Trade associations
14. Others, please specify_____
15. None of the above single code – fix at end
16. DK
17. None or Don't use

Q40A : Export value [ASK ALL, MULTI CODE, RANDOMISE]

Single coded

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

READ OUT

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 [ASK ALL, MULTI CODE, RANDOMISE] Single coded

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

READ OUT

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 [ASK ALL, MULTI CODE, RANDOMISE] 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 goods 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 or manager born overseas
7. Connections with other businesses
8. Owner or manager with a degree
9. An overseas target, such as a sales target or target country
10. Knowledge and expertise of your sector
11. Business contacts database
12. None of these
13. Personal links with an overseas market

SCRIPTER NOTES: ONLY ASK CODE 9 IF NOT Q19A=1

Re-Cont : Survey Specific Re-Contact [ASK ALL]

Single coded

If we have any further questions related to this particular survey, would you be willing to be re-contacted by Kantar within the next 6 months?

INTERVIEWER – IF NECESSARY: Your information will only be used in relation to the research you have agreed to take part in and no-one will ever try to sell you anything based on the information you have given.

1. Agreed to recontact
2. Did not agree to recontact
3. GO TO Goodbye

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 Department for International Trade to link your responses to other information that you have provided previously to the Government? Through this data linkage, we can reduce the burden of our surveys on your business and can improve the evidence that we use.

These might include records kept by HM Revenue and Customs, the Office for National Statistics and the Department for Business, Energy and Industrial Strategy such as, but not limited to, the Inter-Departmental Business Register (IDBR). Linking to new data would be made possible by Kantar sharing the serial number attached to your business on the IDBR, to the Department for International Trade.

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

Q51 : NAME : Respondent's name [ASK ALL]

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

T4 : ASK ALL

Finally, I would just like to confirm that my name is <?> and I've been calling you from Kantar. This interview was conducted in accordance with the MRS Code of Conduct and with our Privacy Policy which can be found at uk.kantar.com/surveys.

As I advised this was a genuine research study. However, if you would like to check any details about the interview I can provide you with relevant numbers to call. Would you like to take these down?

IF YES:

To verify that we are registered as a Market Research Organisation, with a professional code of conduct, please call the Market Research Society on their verification service. The number is 0800 975 9596 – you will be connected free of charge from a landline.

To find our further information about my organisation or the nature of this particular survey you can contact the Telephone Centre Manager on the following numbers during office hours:

West London Centre – xxxxx xxxxx xxxxx

Thank you very much for your time and goodbye.

2.12 Question changes

A number of questions have been changed, added or removed between quarters of Wave 5. A list of changes can be found in the Tables 2.1, 2.2 and 2.3 below:

Table 2.1: Questions changed between quarters

Quarter changed	Question number	Question text
Q2	Q14	Added a new statement to be asked: "In general, demand for British products or services around the world has decreased since the coronavirus outbreak"
Q2	14A	Added new answer code: "Covid-19 or Coronavirus"
Q2	Q31a	Added a new statement to be asked: "Adequate supply chains"
Q2	24B1	Added 4 new answer codes: "Visit/Contact customers", "Marketing/Advertising/Promotions", "We have an international sales team/An overseas branch (any named country)", "Internet email"
Q2	24C1	Added 2 new answer codes: "Online/Internet-based service", "Marketing/Advertising/Promotions"
Q3/Q4	Q14A	Addition of 'please specify' option
Q3/Q4	Q14B	Addition of 'please specify' option

Table 2.2: Questions added between quarters

Quarter added	Question number	Question text
Q2	14B	And what were the other factors contributing to this reduction in demand for British exports in general?
Q2	Covid1	Following the coronavirus outbreak what is the current status of your business? Would you say that...
Q2	Covid2	How has your business' exporting of goods or services been affected by the coronavirus outbreak? Would you say that...
Q2	Covid3	Why has your business reduced or stopped exports since the start of the coronavirus outbreak?
Q2	Covid4	Why has your business increased exports since the start of the coronavirus outbreak?
Q2	Covid 5	Have you experienced any significant supply chain issues for your business caused by the coronavirus outbreak?
Q2	Covid 6	Have you been able to use alternative supply chains to replace those lost?
Q2	Covid 10	How long, if at all, do you expect your business will be affected by the coronavirus outbreak?
Q2	Q50A	At the beginning of this interview we mentioned that it would be recorded. Our client, the Department for International Trade, would be interested in listening to some of the recordings. Do we have your permission to pass your interview, which include your name and survey answers, on to them?
Q3/Q4	A11	How many working owners and partners does the business have? Please include yourself if you are a working owner or partner.
Q3/Q4	A17	Does your business have any directors in day to day control of your business who are not owners or partners?
Q3/Q4	A18	How many, if any, of your directors and partners are women?

Table 2.3: Questions removed between quarters

Quarter removed	Question number	Question text
Q2	QN1	Do you have access to the internet right now?
Q2	Q55	What do you understand by the term 'exporting'?
Q2	Q14 Statement 3	In general, demand for British products or services around the world has decreased over the past year
Q2	Q31 Statement 8	Exporting would give my business the opportunity for higher or faster growth
Q2	Q37a	How willing would your business be to use such services to assist you with exporting if they cost....
Q2	Q56	Which of the following statements best describes your knowledge of World Expos before today?
Q2	Q56A	Have you heard about which city is hosting the World Expo in October 2020?
Q2	Q57	Do you know whether or not the UK is participating in the next World Expo?
Q2	Q58	Which of the following statements best describes your business' interest in participating as a part of the UK's presence in Expo 2020 and other future World Expos?
Q2	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?
Q2	AD6	Had you seen any of these video ads on social media in the past year or so?
Q2	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 podcast trailer. When it finishes, I'd like you to tell me whether you have heard this trailer, including on digital radio, in the past year or so.
Q2	AD8	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?
Q2	AD9	Before today, had you ever seen the logo on this screen before?
Q2	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?
Q2	AD11	Why don't these adverts increase your interest in finding out about exporting?
Q2	AD16	Thinking about these adverts, please tell me to what extent you agree or disagree with each of the following statements.
Q2	AD13	As a result of seeing or hearing these adverts or press coverage what, if anything, have you done or considered doing?
Q2	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...
Q2	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...

3 Appendices

3.1 Appendix 1 – Wave 1 to Wave 4 weights

3.1.1 Wave 1 and 2 weights

At Waves 1 and 2, data were weighted on 3 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, region and sector (based on Standard Industry Classifications).

2 separate sets of data were run, each weighted on the above factors. One of these was based on all businesses; the other on £500,000+ SMEs/MSBs. The difference between the weighted and unweighted sample profiles is summarised in Figures 1.19 and 1.20. 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 £500,000+ 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 1.19: Wave 1 and 2 weighted versus unweighted sample profile amongst the Total Business sample

Company size	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
£500,000+ SME with 1 to 4 employees	174 (12%)	61 (4%)	202 (14%)	69 (5%)
£500,000+ SME with 5 to 9 employees	185 (13%)	67 (5%)	158 (11%)	67 (5%)
£500,000+ SME with 10 to 49 employees	460 (33%)	120 (9%)	461 (33%)	119 (8%)
£500,000+ SME with 50 to 99 employees	96 (7%)	15 (1%)	77 (5%)	15 (1%)
£500,000+ SME with 100 to 249 employees	49 (3%)	6 (0%)	50 (4%)	6 (0%)
MSB with 1 or more employees	196 (14%)	8 (1%)	191 (13%)	9 (1%)
All other businesses on IDBR frame	245 (17%)	1128 (80%)	279 (20%)	1134 (80%)

Region	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
South of England	551 (39%)	611 (43%)	632 (45%)	619 (44%)
Midlands	369 (26%)	344 (24%)	341 (24%)	347 (24%)
North of England	251 (18%)	266 (19%)	263 (19%)	268 (19%)
Scotland	95 (7%)	92 (7%)	81 (6%)	92 (6%)
Wales	72 (5%)	49 (3%)	48 (3%)	49 (3%)
Northern Ireland	67 (5%)	43 (3%)	53 (4%)	42 (3%)

Sector (based on SICs)	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
Manufacturing	232 (17%)	198 (14%)	235 (17%)	197 (14%)
Distribution	428 (30%)	406 (29%)	420 (30%)	399 (28%)
Infrastructure	202 (14%)	259 (18%)	188 (13%)	268 (19%)
Finance, Professional, Technical and Creative	252 (18%)	295 (21%)	289 (20%)	303 (21%)
Other	291 (21%)	247 (18%)	286 (20%)	251 (18%)
Overall Total	1,405	1,405	1,418	1,418

Figure 1.20: Wave 1 and 2 weighted versus unweighted sample profile amongst £500,000+ SMEs/MSBs sample

Company size	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
£500,000+ SME with 1 to 4 employees	174 (15%)	256 (22%)	202 (18%)	279 (24%)
£500,000+ SME with 5 to 9 employees	185 (16%)	280 (24%)	158 (14%)	267 (23%)
£500,000+ SME with 10 to 49 employees	460 (40%)	503 (43%)	461 (40%)	477 (42%)
£500,000+ SME with 50 to 99 employees	96 (8%)	61 (5%)	77 (7%)	58 (5%)
£500,000+ SME with 100 to 249 employees	49 (4%)	25 (2%)	50 (4%)	24 (2%)
MSB with 1 or more employees	196 (17%)	34 (3%)	191 (17%)	34 (3%)
All other businesses on IDBR frame	n/a	n/a	n/a	n/a

Region	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
South of England	448 (39%)	490 (42%)	500 (44%)	484 (42%)
Midlands	309 (27%)	289 (25%)	285 (25%)	284 (25%)
North of England	213 (18%)	229 (20%)	201 (18%)	224 (20%)
Scotland	78 (7%)	78 (7%)	71 (6%)	76 (7%)
Wales	56 (5%)	41 (4%)	38 (3%)	40 (4%)
Northern Ireland	56 (5%)	33 (3%)	44 (4%)	32 (3%)

Sector (based on SICs)	Wave 1 Unweighted profile	Wave 1 Weighted profile	Wave 2 Unweighted profile	Wave 2 Weighted profile
Manufacturing	203 (18%)	164 (14%)	196 (17%)	159 (14%)
Distribution	356 (31%)	353 (30%)	338 (30%)	342 (30%)
Infrastructure	168 (14%)	198 (17%)	152 (13%)	201 (18%)
Finance, Professional, Technical and Creative	210 (18%)	209 (18%)	225 (20%)	207 (18%)
Other	223 (19%)	236 (20%)	228 (20%)	229 (20%)
Overall Total	1,160	1,160	1,139	1,139

3.1.2 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 £500,000 (with additional controls on very small companies with only 0 to 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 turnover interlocked with number of employees, region and sector (based on Standard Industry Classifications). The £500,000+ sample weights were applied to the following variables:

- region interlocked with turnover and number of employees
- sector interlocked with turnover and number of employees
- turnover interlocked with number of 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 1.21: Wave 3 and 4 weighted versus unweighted sample profile amongst the Total Business sample

Company size	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
Less than £500,000 turnover with 0 to 2 employees	250 (8%)	1887 (63%)	288 (10%)	1848 (62%)
Less than £500,000 turnover with 3 to 9 employees	169 (6%)	437 (15%)	223 (7%)	458 (15%)
Less than £500,000 turnover with 10+ employees	37 (1%)	63 (2%)	41 (1%)	65 (2%)
£500,000 to £499,999,999 turnover with 0 to 19 employees	1340 (45%)	449 (15%)	1199 (40%)	466 (16%)
£500,000 to £499,999,999 turnover with 20 to 49 employees	527 (18%)	99 (3%)	572 (19%)	102 (3%)
£500,000 to £499,999,999 turnover with 50 to 249 employees	507 (17%)	48 (2%)	530 (18%)	51 (2%)
£500,000 to £499,999,999 turnover with 250+ employees OR £500m+ turnover	161 (5%)	12 (0%)	147 (5%)	11 (0%)
Region	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
South of England	1268 (42%)	1280 (43%)	1164 (39%)	1294 (43%)
Midlands	771 (26%)	745 (25%)	740 (25%)	731 (24%)
North of England	544 (18%)	559 (19%)	496 (17%)	562 (19%)
Scotland	202 (7%)	200 (7%)	200 (7%)	199 (7%)
Wales	99 (3%)	117 (4%)	200 (7%)	121 (4%)
Northern Ireland	107 (4%)	90 (3%)	200 (7%)	93 (3%)
Sector (based on SICs)				
Manufacturing	519 (17%)	365 (12%)	547 (18%)	367 (12%)
Distribution	915 (31%)	652 (22%)	977 (33%)	690 (23%)
Infrastructure	387 (13%)	544 (18%)	396 (13%)	540 (18%)
Finance, Professional, Technical and Creative	630 (21%)	954 (32%)	569 (19%)	938 (31%)
Other	540 (18%)	476 (16%)	511 (17%)	465 (16%)
Overall Total	2,991	2,991	3,000	3,000

Figure 1.22: Wave 3 and 4 weighted versus unweighted £500,000+ sample profile (1 of 2)

Region interlocked with turnover and number of employees	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
North with £500,000+ turnover and 20 to 49 employees	99 (4%)	89 (4%)	81 (3%)	86 (4%)
North with £500,000+ turnover and 50 to 249 employees	118 (5%)	46 (2%)	110 (4%)	43 (2%)
North - All other with £500,000+ turnover	255 (10%)	360 (14%)	202 (8%)	347 (14%)
Midlands with £500,000+ turnover and 20 to 49 employees	139 (5%)	104 (4%)	148 (6%)	100 (4%)
Midlands with £500,000+ turnover and 50 to 249 employees	140 (6%)	51 (2%)	119 (5%)	49 (2%)
Midlands - All other with £500,000+ turnover	386 (15%)	492 (19%)	331 (14%)	468 (19%)
South with £500,000+ turnover and 20 to 49 employees	225 (9%)	160 (6%)	222 (9%)	155 (6%)
South with £500,000+ turnover and 50 to 249 employees	187 (7%)	81 (3%)	229 (9%)	79 (3%)
South - All other with £500,000+ turnover	655 (26%)	834 (33%)	517 (21%)	812 (33%)
Scotland with £500,000+ turnover and 20 to 49 employees	30 (1%)	28 (1%)	41 (2%)	27 (1%)
Scotland with £500,000+ turnover and 50 to 249 employees	33 (1%)	15 (1%)	30 (1%)	14 (1%)
Scotland - All other with £500,000+ turnover	104 (4%)	119 (5%)	102 (4%)	114 (5%)
Wales with £500,000+ turnover and 20 to 49 employees	17 (1%)	15 (1%)	44 (2%)	15 (1%)
Wales with £500,000+ turnover and 50 to 249 employees	20 (1%)	8 (0%)	28 (1%)	7 (0%)
Wales - All other with £500,000+ turnover	43 (2%)	63 (2%)	95 (4%)	60 (2%)
Northern Ireland with £500,000+ turnover and 20 to 49 employees	17 (1%)	13 (1%)	36 (1%)	12 (0%)
Northern Ireland with £500,000+ turnover and 50 to 249 employees	12 (0%)	5 (0%)	17 (1%)	6 (0%)
Northern Ireland – All other with £500,000+ turnover	55 (2%)	53 (2%)	96 (4%)	52 (2%)

Figure 1.23: Wave 3 and 4 weighted versus unweighted £500,000+ sample profile (2 of 2)

Sector interlocked with turnover and number of employees	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
Manufacturing with £500,000+ turnover and 20 to 49 employees	93 (4%)	63 (2%)	117 (5%)	59 (2%)
Manufacturing with £500,000+ turnover and 50 to 249 employees	126 (5%)	41 (2%)	127 (5%)	39 (2%)
Manufacturing - All other with £500,000+ turnover	243 (10%)	228 (9%)	218 (9%)	216 (9%)
Infrastructure with £500,000+ turnover and 20 to 49 employees	66 (3%)	51 (2%)	57 (2%)	50 (2%)
Infrastructure with £500,000 turnover and 50 to 249 employees	51 (2%)	23 (1%)	61 (2%)	23 (1%)
Infrastructure - All other with £50,000+ turnover	227 (9%)	388 (15%)	222 (9%)	383 (16%)
Distribution with £500,000+ turnover and 20 to 49 employees	145 (6%)	122 (5%)	175 (7%)	118 (5%)
Distribution with £500,000+ turnover and 50 to 249 employees	134 (5%)	48 (2%)	163 (7%)	48 (2%)
Distribution - All other with £500,000+ turnover	491 (19%)	570 (22%)	460 (19%)	542 (22%)
Financial services with £500,000+ turnover and 20 to 49 employees	103 (4%)	76 (3%)	100 (4%)	75 (3%)
Financial services with £500,000+ turnover and 50 to 249 employees	85 (3%)	41 (2%)	82 (3%)	40 (2%)
Financial services - All other with £500,000+ turnover	305 (12%)	350 (14%)	236 (10%)	342 (14%)
Other with £500,000+ turnover and 20 to 49 employees	120 (5%)	99 (4%)	123 (5%)	93 (4%)
Other with £500,000+ turnover and 50 to 249 employees	114 (4%)	53 (2%)	100 (4%)	50 (2%)
Other - All other with £500,000+ turnover	232 (9%)	385 (15%)	207 (8%)	370 (15%)
Turnover interlocked with number of employees	Wave 3 Unweighted profile	Wave 3 Weighted profile	Wave 4 Unweighted profile	Wave 4 Weighted profile
£500,000 to £24,999,999 turnover with 0 to 4 employees	594 (23%)	631 (25%)	491 (20%)	634 (26%)
£500,000 to £24,999,999 turnover with 5 to 9 employees	208 (8%)	611 (24%)	171 (7%)	588 (24%)
£500,000 to £24,999,999 turnover with 10 to 19 employees	477 (19%)	624 (25%)	469 (19%)	576 (24%)
£500,000 to £24,999,999 turnover with 20 to 49 employees	451 (18%)	401 (16%)	512 (21%)	388 (16%)
£500,000 to £24,999,999 turnover with 50 to 99 employees	241 (10%)	124 (5%)	242 (10%)	121 (5%)
£500,000 to £24,999,999 turnover with 100 to 249 employees	82 (3%)	51 (2%)	76 (3%)	50 (2%)
£25m to £499,999,999 turnover with 0 to 19 employees	61 (2%)	10 (0%)	68 (3%)	11 (0%)
£25m+ with 20 to 49 employees	76 (3%)	8 (0%)	60 (2%)	7 (0%)
£25m+ with 50 to 249 employees	187 (7%)	30 (1%)	215 (9%)	29 (1%)
£500m+ with fewer than 20 or 250+ employees OR £500,000+ turnover with 250+ employees	158 (6%)	46 (2%)	144 (6%)	44 (2%)
Overall Total	2,535	2,535	2,448	2,448

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