

SAMPLE SOURCE

Panel	1	INTRODUCTION 1 OR 2
Top up - IDBR	2	INTRODUCTION 4
Top-up – Unregistered	3	INTRODUCTION 4
Previous panelist – did not do interview in 2021	4	INTRODUCTION 3

INFORMATION NEEDED FROM PANEL IN CONTACTS TO INFORM YEAR 9 FILTERS

Information		Taken from (2022) – variable or Q no.	Affects (2023)
Name of respondent	1	S5	INTRODUCTION 1 OR 2
Month interviewed in 2022	2	S6	INTRODUCTION 1 OR 2
Whether emailed a report	3	U1c/1	INTRODUCTION 1
Name of business	4	Source	S7
Type of organisation	5	A_2_2022	THROUGHOUT
Number of employees		DATABASE, A2_2022	A2, B1
Country		NATION_2022	Various places in questionnaire e.g. Section K
Number of owners/directors		A17A2A_2022	A22/A23
Number of owners		A2A_2022	A22/A23
Number of directors		A17_2022	A22/A23
Exporter		C1_C2_2022	C3b, C5a
Export strategy/plan		C1_C2_2015-2022	C4_a
No plans to export		C5_a_2022/3, C7_2022/2	C5a
No product/service suitable for export		C5_a_2022/3	C0
Legal status		A5SUM_2022	F6
Whether a charity		A0_2022	F12
Applied for finance in 2022		H4A_2022	H4a
Previously approached NI Invest		K10DN_2022	K10d
Turnover band for check		P1B_2022	P1c, P1c_1, P1d, P2
Does not have an alternative number		U1a/96 or 98	U1a
Did not supply email address		U1b/96 or 98	U1b
Did not agree to data linkage		U2/2	U2

## PANEL AND PREVIOUS PANELIST ONLY - ASK TO SPEAK TO NAMED CONTACT

Speaking to named contact	1	CONTINUE
Named contact not available	2	ARRANGE CALLBACK
Named contact has left business	3	GO TO INTRODUCTION 2

NB: IF NAME IS SPELLED INCORRECTLY ON DATABASE, CORRECT HERE

**Good morning/afternoon, my name is XXX and I'm calling on behalf of....**

**(ENGLAND) ...the Department for Business and Trade...**

**IF NECESSARY: Previously the Department for Business, Energy and Industrial Strategy**

**(SCOTLAND) ...the Scottish Government...**

**(NORTHERN IRELAND) ...Invest NI...**

**(WALES) ...the Welsh Government...**

**...from BMG Research. We're conducting the UK's Small Business Survey, the Government's main survey of small businesses.**

**Could I please speak to [NAMED CONTACT]? IF YES, CONTINUE, IF NO GO TO INTRODUCTION 2**

**INTRODUCTION 1 (PANEL – PREVIOUS RESPONDENT)**

**(ALL) You may remember that we interviewed you in [MONTH/YEAR] and on that occasion you kindly agreed to take part in a further survey. The UK Government's Small Business Survey is key to how the Government consults with small businesses, and its main aim is to track the progress of businesses over time, while also to ensure that the Government is aware of significant issues facing businesses like yours.**

**Would you be able to help us again?**

**IF NECESSARY: This year, we're particularly focusing on issues such as the impact of above-target levels of inflation amongst others.**

**IF NECESSARY: There are so many challenges that businesses in the UK face at the moment, and that's why it's so important that we are able to talk to you about what your business is experiencing.**

**IF NECESSARY: The Small Business Survey helps to inform Government policy and improve the Government's understanding with regard to which interventions best support small businesses.**

**(ALL) The interview will take about 20 minutes depending on your responses.**

**(IF THEY MENTION THE BUSINESS HAS PERMANENTLY CLOSED) If your business has closed we'd still like to ask you a few brief questions which will only take a couple of minutes.**

**SEND REASSURANCE EMAIL IF NECESSARY**

**- IF RESPONDENT WANTS FURTHER REASSURANCE GIVE THEM EMMA'S CONTACT DETAILS, SAY:**

**I understand your concerns, if you'd like to email the project manager, Emma Osborne at [lsbs2023@bmgresearch.com](mailto:lsbs2023@bmgresearch.com) she will be happy to provide more information.**

**IF RESPONDENT SAYS THEY WANT TO BE PAID FOR THEIR TIME SAY:**

**I appreciate that your time is valuable but paying people to help us with the survey would make it too expensive to undertake and might influence how people answer the questions. Gathering this feedback is important to determine how businesses are performing and coping with challenges, and what their plans are for the future. The information gathered helps to inform Government interventions to better support small businesses.**

**IF NECESSARY: The results of previous Small Business Surveys are available to view on the .GOV.uk website and this survey's report will also be published in late summer 2024.**

**Can I confirm that you are happy to participate in the survey? IF YES, RECORD ON SCRIPT**

READ OUT:

**If you would like further information on how BMG handles and processes personal data, as well as information on your rights under data protection regulations to access your personal data, withdraw consent, or object to the processing of your personal data you can visit:**

**<https://www.bmgresearch.co.uk/privacy/>**

**Before we begin, I need to read out a quick statement regarding GDPR legislation.**

**I want to reassure you that all information collected will be treated in the strictest confidence. You have the right to a copy of your data, change your data or withdraw from the research at any point. In order to guarantee this, and as part of our quality control procedures, all interviews are recorded. Is that OK?**

IF NECESSARY:

Contact at BMG Research is Emma Osborne if you would like to find out more about the survey at **[lsbs2023@bmgresearch.com](mailto:lsbs2023@bmgresearch.com)**

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INTRODUCTION 2 (PANEL – NEW RESPONDENT)

ASK TO SPEAK TO OWNER/PROPRIETOR/MD/OTHER SENIOR DECISION MAKER, IF NOT SPEAKING TO THEM ALREADY

(PANEL) **Back in [MONTH/YEAR] we interviewed [NAME OF 2022 RESPONDENT] for the Government's Small Business Survey. The UK Government's Small Business Survey is key to how the Government consults with small businesses, and its main aim is to track the progress of businesses over time, while also to ensure that the Government is aware of significant issues facing businesses like yours.**

(PANEL IF THEY MENTION THAT 2022 RESPONDENT HAS LEFT THE BUSINESS) **We'd very much appreciate it if you would help us instead as the survey tracks the progress of your business. Would you be able to help us?**

IF NECESSARY: **This year, we're particularly focusing on issues such as the impact of above-target levels of inflation amongst others.**

IF NECESSARY: **There are so many challenges that businesses in the UK face at the moment, and that's why it's so important that we are able to talk to you about what your business is experiencing.**

IF NECESSARY: **Your participation will ensure that your business' views are represented to the Government.**

IF NECESSARY: **The survey findings are widely used across Government departments and by other public bodies to plan and provide targeted support to different industries.**

(IF THEY MENTION THE BUSINESS HAS PERMANENTLY CLOSED) **If your business has closed we'd still like to ask you a few brief questions which will only take a couple of minutes.**

IF RESPONDENT SAYS THEY WANT TO BE PAID FOR THEIR TIME SAY:

**I appreciate that your time is valuable but paying people to help us with the survey would make it too expensive to undertake and might influence how people answer the questions. Gathering this feedback is important to determine how businesses are performing and coping with challenges, and what their plans are for the future. The information gathered helps to inform Government interventions to better support small businesses.**

SEND REASSURANCE EMAIL IF NECESSARY

- IF RESPONDENT WANTS FURTHER REASSURANCE GIVE THEM EMMA'S CONTACT DETAILS, SAY:

**I understand your concerns, if you'd like to email the project manager, Emma Osborne at [lsbs2023@bmgresearch.com](mailto:lsbs2023@bmgresearch.com) she will be happy to provide more information.**

**ALL: It will take about 20 minutes, depending on your responses. Is it convenient to go through it now or I can call back at a time and date that is more suitable for you?**

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IF NECESSARY:

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INTRODUCTION 3 (PREVIOUS PANEL)

**Good morning/afternoon), my name is XXX and I'm calling on behalf of...**

(ENGLAND) ...the Department for Business and Trade...

IF NECESSARY: **Previously the Department for Business, Energy and Industrial Strategy**

(SCOTLAND) ...the Scottish Government...

(NORTHERN IRELAND) ...Invest NI...

(WALES) ...the Welsh Government...

(ALL)...from **BMG Research. We're conducting the UK's Small Business Survey, the Government's main survey of small businesses.**

Could I please speak to [NAMED CONTACT]? IF YES GO TO INTRO\_A

IF NOT AVAILABLE, ASK TO SPEAK TO OWNER/PROPRIETOR/MD/OTHER SENIOR DECISION MAKER, IF NOT SPEAKING TO THEM ALREADY AND GO TO INTRO\_B

(PREVIOUS PANEL IF THEY MENTION THAT [LAST] RESPONDENT HAS LEFT THE BUSINESS) **I understand that [NAME OF [LAST] RESPONDENT] has left the business, but the survey tracks the progress of your business rather than the individual. Would you be able to help us?**

(PREVIOUS PANEL – PREVIOUS RESPONDENT) INTRO\_A: **Back in [MONTH/YEAR] we interviewed you for the Government's Small Business Survey. At that time you expressed a willingness to help with this survey in the future, but we haven't been able to reach you since then. The UK Government's Small Business Survey is key to how the Government consults with small businesses, and its main aim is to track the progress of businesses over time, while also to ensure that the Government is aware of significant issues facing businesses like yours.**

(PREVIOUS PANEL – NEW RESPONDENT) INTRO\_B: **Back in [MONTH/YEAR] we interviewed [NAME OF [LAST] RESPONDENT] for the Government’s Small Business Survey. At that time [NAME OF [LAST] RESPONDENT] expressed a willingness to help with this survey in the future, but we haven’t been able to reach them, or anyone else within your business since then. The UK Government’s Small Business Survey is key to how the Government consults with small businesses, and its main aim is to track the progress of businesses over time, while also to ensure that the Government is aware of significant issues facing businesses like yours.**

**IF NECESSARY: This year, we’re particularly focusing on issues such as the impact of above-target levels of inflation amongst others.**

**IF NECESSARY: There are so many challenges that businesses in the UK face at the moment, and that’s why it’s so important that we are able to talk to you about what your business is experiencing.**

**IF NECESSARY: Your participation will ensure that your business’ views are represented to the Government.**

**IF NECESSARY: The survey findings are widely used across Government departments and by other public bodies to plan and provide targeted support to different industries.**

**IF NECESSARY – IF ASKED WHAT THE SURVEY IS ABOUT: There are a range of issues about which the UK Government wants to hear from small businesses, including your business’ performance and activity, the challenges you’re facing and your plans for the future. It also asks about business support and finance that you have obtained or would like to obtain to help your business thrive and grow.**

**IF NECESSARY: Whether or not you like the government’s actions this is your chance to influence them – everyone’s views will be taken into account.**

**(IF THEY MENTION THE BUSINESS HAS PERMANENTLY CLOSED) If your business has closed we’d still like to ask you a few brief questions which will only take a couple of minutes.**

**IF RESPONDENT SAYS THEY WANT TO BE PAID FOR THEIR TIME SAY:**

**I appreciate that your time is valuable but paying people to help us with the survey would make it too expensive to undertake and might influence how people answer the questions. Gathering this feedback is important to determine how businesses are performing and coping with challenges, and what their plans are for the future. The information gathered helps to inform Government interventions to better support small businesses.**

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**I understand your concerns, if you’d like to email the project manager, Emma Osborne at [lsbs2023@bmgresearch.com](mailto:lsbs2023@bmgresearch.com) she will be happy to provide more information.**

**ALL: It will take about 20 minutes, depending on your responses. Is it convenient to go through it now or I can call back at a time and date that is more suitable for you?**

**IF NECESSARY: The results of previous Small Business Surveys are available to view on the .GOV.uk website and this survey’s report will also be published in late summer 2024.**

**Can I confirm that you are happy to participate in the survey? IF YES, RECORD ON SCRIPT**

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INTRODUCTION 4 (TOP-UPS)

ASK TOP-UP SAMPLE, PERSON ANSWERING PHONE

S1) **Good morning/afternoon, can I check that I'm calling** [NAME OF BUSINESS].

Yes	1
No	2

ASK IF NO AT S1

S2) **Has your business ever been called** [NAME OF BUSINESS]? IF YES, RECORD NEW NAME OF BUSINESS

Yes	1	RECORD NEW NAME OF BUSINESS
No	2	THANK AND CLOSE

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IF NECESSARY: **Previously the Department for Business, Energy and Industrial Strategy**

(SCOTLAND) ...the **Scottish Government...**

(NORTHERN IRELAND) ...**Invest NI...**

(WALES) ...the **Welsh Government...**

(ALL)...**from BMG Research.**

ASK TO SPEAK TO OWNER/PROPRIETOR/MD/OTHER SENIOR DECISION MAKER, IF NOT SPEAKING TO THEM ALREADY

**May I please speak to someone who is in a senior role there? The owner, managing director or someone else in a director-level position.**

ONCE THROUGH TO THE RIGHT PERSON;

**Good morning/afternoon, my name is XXX and I'm calling on behalf of...**

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(SCOTLAND) ...the **Scottish Government...**

(NORTHERN IRELAND) ...**Invest NI...**

(WALES) ...the **Welsh Government...**

(ALL)...**from BMG Research.**

**We're conducting the UK's Small Business Survey, the Government's main survey of small businesses.**

**(ALL) I would like to ask for your feedback on behalf of your business.**

**IF NECESSARY – IF ASKED WHAT THE SURVEY IS ABOUT: The UK Government's Small Business Survey is key to how the Government consults with small businesses, and its main aim is to ensure that the Government is aware of significant issues facing businesses like yours.**

**The survey covers your business' performance and activity, the challenges you're facing and your plans for the future. It also asks about business support and finance that you have obtained or would like to obtain to help your business thrive and grow.**

**IF NECESSARY: Your participation will ensure that your business' views are represented to the Government.**

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ASK IF TOP UP SAMPLE AND ZERO EMPLOYEES (DATABASE)  
S2b Are you the owner or person in overall charge there?

Yes	1	
No/Uncertain	2	ASK TO SPEAK TO OWNER OR PERSON IN OVERALL CHARGE – TRANSFER, SET APPOINTMENT, REFUSED OR OTHER

ASK PANEL IF NOT TALKING TO NAMED CONTACT AND TOP UP SAMPLE WITH EMPLOYEES  
S3) Can I just check, are you one of the most senior people in day-to-day control of [NAME OF BUSINESS]?

Yes	1	
No/Uncertain	2	ASK TO SPEAK TO SENIOR PERSON IN THE ORGANISATION – TRANSFER, SET APPOINTMENT, REFUSED OR OTHER

S4) ASK TOP-UP UNREGISTERED SAMPLE ONLY  
**Before we start, can I just check the following?** READ OUT. MULTICODE 1-2

<b>Are you registered for VAT?</b>	1
<b>Do you have any employees on your payroll?</b>	2
Neither of these	96
Refused	98

IF S4/1-2, THANK AND CLOSE: **Thank you, but we were looking for unregistered businesses with no employees to complete the survey.**

S5) ASK ALL TOP-UP SAMPLE, AND PANELISTS WHERE NOT INTERVIEWING THE PREVIOUS YEAR'S RESPONDENT  
**Could I please take your name?** RECORD RESPONDENT'S NAME. ASK THEM TO SPELL IT IF NECESSARY. ENTER TWICE

Forename:
Surname

Refused 98

S6) ASK ALL TOP-UP SAMPLE, AND PANELISTS WHERE NOT INTERVIEWING THE PREVIOUS YEAR'S RESPONDENT  
**And can I take your job title please?** RECORD RESPONDENT'S JOB TITLE

--

Refused 98



ASK ALL

S7) **What is the current trading status of [NAME OF BUSINESS FROM DATABASE] ? READ OUT AND CODE ONE ONLY. IF NAME OF BUSINESS WAS WRONG ON DATABASE, PLEASE CODE 2 AND AMEND IT HERE**

NOTE: ONLY READ OUT CODE 2 IF NAME OF BUSINESS WAS WRONG ON DATABASE

Trading	1
MULTI CODE: Trading under a different name (SPECIFY NAME)	2
Not trading/closed	3

IF NOT TRADING/CLOSED (S7/3)

S7a) **Is this closure temporary or permanent? SINGLE CODE ONLY**

Temporary	1
Permanent	2
Not sure at the moment	3

ASK IF CEASED TRADING PERMANENTLY (S7a/2)

S8) **I would like to ask you just a few questions about [NAME OF BUSINESS]. These will help in our analysis of why businesses close. Please be assured that all answers will be treated in the strictest confidence.**

**Which of these, if any, are reasons why the business is no longer trading? READ OUT. RANDOMISE ORDER OF READING. MULTICODE OK**

ASK IF MORE THAN ONE ANSWER GIVEN AT S8/1-11, 95

S9) **And which was the main reason? READ AGAIN IF NECESSARY. SINGLE CODE ONLY**

	S8	S9
<b>Lack of demand for products/services</b>	1	1
<b>The business was unprofitable</b>	2	2
<b>The risks involved were too big</b>	3	3
<b>Could not get external finance<sup>1</sup></b>	4	4
<b>External finance was too expensive</b>	5	5
<b>Another job or business opportunities</b>	6	6
<b>Family or personal reason</b>	7	7
<b>Difficulties finding the right staff</b>	8	8
<b>Retirement</b>	9	9
<b>You sold the business</b>	10	10
<b>Coronavirus – COVID 19</b>	11	11
<b>Energy prices</b>	12	12
<b>Other rising costs (SPECIFY)</b>	13	13
<b>Any other reason (SPECIFY)</b>	95	95
<b>Don't know</b>	97	97
<b>Refused</b>	98	98

ASK IF CEASED TRADING PERMANENTLY (S7a/2)

S10) **Could you please describe in more detail the circumstances under which your business ceased trading?** WRITE IN FULL

Refused 98

ASK IF CEASED TRADING PERMANENTLY (S7a/2)

S11) **To what extent do you agree or disagree with the following statements** READ OUT. RANDOMISE ORDER OF READING. SINGLE CODE FOR EACH. FOR EACH PROBE WHETHER (DIS) AGREE STRONGLY OR SLIGHTLY

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	Don't know
(a) <b>Working in [NAME OF BUSINESS] has made you more confident in your ability to run a successful business</b>	1	2	3	4	5	97
(b) <b>Working in [NAME OF BUSINESS] has made you more likely to start a business in future</b>	1	2	3	4	5	97
(c) <b>Working in [NAME OF BUSINESS] has had a positive effect on your personal finances</b>	1	2	3	4	5	97

ASK IF AGREE OR DISAGREE THAT THEY ARE MORE CONFIDENT (S11a/1-2, 4-5)

S12a) **Why has this experience made you more/less confident in your ability to run a successful business?** WRITE IN FULL

Refused 98

ASK IF AGREE OR DISAGREE THAT THEY ARE MORE LIKELY TO START A BUSINESS IN FUTURE (S11b/1-2, 4-5)

S12b) **Why has this experience made you more/less likely to want to start a business in future?** WRITE IN FULL

Refused 98

ASK IF AGREE OR DISAGREE THAT THE EXPERIENCE HAS HAD A POSITIVE EFFECT ON THEIR PERSONAL FINANCES (S11c/1-2, 4-5)

S12c) **Please describe how the experience of running a business has affected your personal financial position?** WRITE IN FULL

Refused 98

NOW GO TO THANK AND CLOSE

ASK IF CEASED TRADING TEMPORARILY (S7a/1)

S13 **Why has [NAME OF BUSINESS FROM DATABASE] closed temporarily?**

WRITE IN FULL

ASK IF CEASED TRADING TEMPORARILY (S7a/1)

S14 **When do you expect to reopen? PROBE FOR ESTIMATE AND CODE ONE ONLY**

<b>In the next 2-3 weeks</b>	1
<b>In the next 1-2 months</b>	2
<b>In the next 3-4 months</b>	3
<b>In the next 5-6 months</b>	4
<b>Not for at least 6 months</b>	5
<b>Don't know when will open again but is certain they will</b>	6
<b>Don't know if they will open again</b>	7
Refused	8

IF CEASED TRADING TEMPORARILY (S7a/1) READ OUT: I would appreciate it if you would answer the questions on the basis of when you were last trading.

## SECTION A: ABOUT THE BUSINESS

ASK TOP-UPS ONLY

- A-2) **I would like to start by asking a number of questions about [NAME OF BUSINESS]. Which of these best describe [NAME OF BUSINESS]? READ OUT. SINGLE CODE ONLY**

<b>A business?</b>	1
<b>An organisation?</b>	2
<b>A sole proprietorship?</b>	3
Other (SPECIFY)	95
Don't know	97

IF CODES 1, 3, OTHER OR DON'T KNOW, USE 'BUSINESS' AS TEXT SUB

ASK PANEL ONLY

- A-1) **Since we last interviewed (IF INTRO 1: you; IF INTRO 2: your [ANSWER AT A-2]), in [MONTH/YEAR] have any of the following changes occurred in your [ANSWER AT A-2]? READ OUT. MULTICODE OK**

<b>You opened or closed a new branch, site or office</b>	1
<b>ASK IF MULTI-SITE (PAST): You moved your head office</b>	2
<b>You changed your legal status</b>	3
<b>You said last time we talked to you that you had [A17_2022] directors in day to day control of the [ANSWER AT A-2] that are not working owners or partners. Has this number increased or decreased since then?</b>	4
<b>ASK IF NOT REGISTERED (PAST): You became registered for VAT for the first time</b>	5
<b>You changed the principal activity of your [ANSWER AT A-2]</b>	6
<b>The ownership structure of the [ANSWER AT A-2] has changed</b>	7
None of these	96
Don't know	97
Refused	98
<b>UNPROMPTED CODE: Deregistered for VAT - why have you done that? (SPECIFY)</b>	8

- A0) **ASK TOP-UP SAMPLE, PREVIOUS PANEL, OR PANELISTS IF LEGAL STATUS CHANGED (A-1/3) (ASK TOP-UPS AND PREVIOUS PANEL) Can I check, are you a registered charity?**

(ASK PANELISTS) **Have you become a registered charity since we last interviewed you? SINGLE-CODE**

IF NECESSARY: **As a registered charity you should be registered with the Charity Commission**

Yes	1
No	2
Don't know	97

A1) ASK TOP-UP SAMPLE, OR PANEL IF OPENED/CLOSED BRANCHES (A-1/1)  
**How many permanent sites in the UK does your [ANSWER AT A-2] operate from, including your head office?**

IF >1:

**Can I please confirm that this does not include any mobile or temporary sites?**

**Can I also please confirm that this does not include sites from which staff are working remotely, such as home addresses? These should not be included as permanent sites of your [ANSWER AT A-2].**

ENTER NUMBER (RANGE=1-9,999) \_\_\_\_\_

Don't know / Uncertain ...97  
 Refused ... 98

INTERVIEWER PLEASE NOTE IF RESPONDENT MENTIONS THAT THEY ARE:

<b>A subsidiary of an overseas organisation</b>	1
<b>Wholly UK owned</b>	2
<b>Neither</b>	3

A2) ASK ALL, EXCEPT TOP-UP UNREGISTERED SAMPLE  
**Approximately, how many employees are currently on your payroll in the UK, excluding owners and partners[IF A1/2+ OR A1\_2021/2+: across all your UK sites]?**

**READ OUT: Please...**

- INCLUDE ALL FULL AND PART TIME STAFF
- INCLUDE ALL TEMPORARY/CASUAL STAFF
- DO NOT INCLUDE ANY STAFF THAT ARE SUPPLIED BY AN EMPLOYMENT AGENCY
- EXCLUDE ANYONE WORKING FOR YOU WHO IS SELF-EMPLOYED, SUCH AS SELF-EMPLOYED CONTRACTORS
- EXCLUDE OWNERS/PARTNERS UNLESS THEY ARE PAYE,
- INCLUDE OTHER DIRECTORS THAT ARE PAYE

IF NECESSARY, IF AN EMPLOYMENT/RECRUITMENT AGENCY: **Just to clarify, any workers that you supply to another business or organisation under a temporary contract should be counted as employees. That is everyone who is active on your books, as they are on your payroll.**

ENTER NUMBER (RANGE=0-99,999) \_\_\_\_\_

PROMPT FOR AN APPROXIMATION - DO NOT ALLOW DON'T KNOW/REFUSED.  
 DO NOT ENTER 0 IF RESPONDENT CANNOT ANSWER - ASK IF THEY HAVE ANY EMPLOYEES

PREVIOUS YEARS EMPLOYEE NUMBER ON SCREEN IF PANEL OR PAST PANEL

PANEL/PAST PANEL - CHECK IF CHECK TO BE BASED ON:

A2=0 A2\_2022=<0; A2=1-9 A2\_2022= +/- 3 or more; A2=10-24 A2\_2022= +/- 5 or more; A2=25-99 A2\_2022= +/- 10 or more; A2=100-249 A2\_2022= +/- 20 or more; A2=250+ ask all

A2x) **According to our records, last year you employed [A2\_2022] and now you employ [A2], can you confirm that these figures are correct? IF YES CONTINUE, IF NO ASK A2 AGAIN SINGLE CODE ONLY**

Both this year's and last year's figures correct - CONTINUE	1
Last year's incorrect - CONTINUE BUT THEN ASK B1	2
This year's incorrect - REASK A2	3
This year's correct but do not know last year's	4

A2i) TO COMPLETE IF FIGURE GIVEN AT A2  
INTERVIEWERS TO RE-ENTER NUMBER OF EMPLOYEES INTO RANGE. DO NOT ASK. SINGLE CODE ONLY

None	0
1-9	1
10-99	2
100-249	3
250 or more	4
Have employees	5

IF TOP-UP OR PREVIOUS PANEL SAMPLE AND MORE THAN 249 EMPLOYEES, THANK AND CLOSE A2DUM CATI TO CODE AUTOMATICALLY TO FOLLOWING BANDS FOR QUOTAS:

MONITORING QUOTAS	Top-Up	Panel
None (no employees) - panel	n/a	A2/0
None (no employees) – top-up unregistered	Unregistered sample	n/a
None (no employees) – top-up registered	A2/0	n/a
1-4 employees (Very small micro)	A2/1-4	A2/1-4
5-9 employees (Larger micro)	A2/5-9	A2/5-9
10-19 employees (Small small)	A2/10-19	A2/10-19
20-49 employees (Larger small)	A2/20-49	A2/20-49
50-249 employees (Medium)	A2/50-249	A2/50-249
250+ employees (Large)	n/a	A2/250-99,999

A2b) ASK ALL WITH EMPLOYEES AT A2 (A2=>0)  
**How many of those working for the [ANSWER AT A-2], if any, are temporary or casual staff?** (RANGE 0-ANSWER AT A2)  
IF NECESSARY, IF AN EMPLOYMENT/RECRUITMENT AGENCY: **Just to clarify, any workers that you supply to another business or organisation under a temporary contract should be counted as temporary or casual staff. That is, everyone who is active on your books.**

A2bi) IF A2b HIGHER THAN A2 ASK:  
**Did the number of employees you provided earlier include temporary and casual staff?**  
SINGLE CODE ONLY

Yes - REASK A2: <b>Could you please tell me again ....REASK A2</b>	1
No - CONTINUE	2

A2c) ASK ALL  
**And how many, if any, contractor or agency staff or self-employed do you have working for you right now that are not on the payroll (ADD IF A CHARITY A0/1: Please include volunteers)?** (RANGE 0-999)  
IF NECESSARY, IF AN EMPLOYMENT/RECRUITMENT AGENCY: **To remind you, any workers that you supply to another business or organisation under a temporary contract should be counted as temporary or casual staff and NOT contractor or agency staff.**

ASK IF A0/1 OR PANEL = A0/1:

A2d) **And how many, if any, unpaid volunteers do you have working for you right now?** (RANGE 0-999)

**INTERVIEWER NOTE: These should also have been included in the previous answer regarding contractor/agency/self-employed.**

	Enter number	DK	REF
A2b (temporary/casual)		97	98
A2c (not on the payroll)		97	98
A2d (unpaid volunteers)			

A3) ASK TOP-UP/PAST PANEL SAMPLE OR PANEL WHOSE ACTIVITY CHANGED (A-1/6)  
 (IF I have [READ OUT SECTOR DESCRIPTION FROM SAMPLE] as a general classification of your [ANSWER AT A-2]'s principal activity. Bearing in mind this is a general classification only, does this sound about right?

Yes	1
No	2

ASK IF SECTOR DESCRIPTION NOT CORRECT AT A3

A4) **What is the principal activity of your [ANSWER AT A-2]? PROBE AS NECESSARY:**

- **What is the main product or service of this [ANSWER AT A-2]?**
- **What exactly is made or done at this [ANSWER AT A-2]?**

PROBE FULLY. RECORD DETAILS AND CODE BELOW. CODE TO 4 DIGITS


ASK TOP-UP IDBR SAMPLE<sup>2</sup>, IF LEGAL STATUS LISTED AS COMPANY/SOLE PROPRIETORSHIP OR PARTNERSHIP

A5a) **Our records show that the legal status of your [ANSWER AT A-2] is a [LEGAL STATUS FROM DATABASE]? Is this correct?**

Yes	1
No	2
Don't know	97
Refused	98

ASK IF YES AT A5a, AND LEGAL STATUS IS 'COMPANY'

A5b) **What type of company is it? Is it a... READ OUT. SINGLE CODE ONLY**

<b>Private limited company, limited by shares (LTD.)</b>	1
<b>Private company limited by guarantee</b>	2
<b>Or another form of company (SPECIFY)</b>	3
Don't know	97
Refused	98

<sup>2</sup> Do not ask previous panelists

A5c) ASK PANEL WHOSE LEGAL STATUS CHANGED (A-1/3)  
**Previously when we spoke to you your legal status was [A5\_2022]. What is your legal status now?**  
 ADD IF A CHARITY A0/1: **This is in addition to your charitable status).** DO NOT READ OUT, BUT PROMPT IF NECESSARY. SINGLE CODE ONLY

ASK IF UNREGISTERED TOP-UP, PAST PANEL, OR IF 'NO' AT A5a  
**What is the legal status of your [ANSWER AT A-2]? (ADD IF A CHARITY A0/1: This is in addition to your charitable status).** DO NOT READ OUT, BUT PROMPT IF NECESSARY. SINGLE CODE ONLY

Sole proprietorship/trader	1
Private limited company, limited by shares (LTD.)	2
Private company limited by guarantee	3
Partnership	4
Limited liability partnership	5
Charitable Incorporated Organisation	6
Other (SPECIFY)	95
Don't know	97
Refused	98

A6) ASK TOP-UPS ONLY (NOT PAST PANEL)  
**In which year did your [ANSWER AT A-2] first start trading? This includes under all ownerships and all legal statuses?**

	Enter Year (4 DIGITS STARTING 10-20)	DK	REF
A6 (first started trading)		97	98

A7) ASK IF DON'T KNOW (97) AT A6  
**Did it first start trading...** READ OUT. SINGLE CODE ONLY

<b>In the last five years?</b>	1
<b>6 – 10 years ago?</b>	2
<b>11 – 20 years ago?</b>	3
<b>More than 20 years ago?</b>	4
Don't know	97

A8) ASK TOP-UPS AND PAST PANEL  
**Our records have the following as a postcode for your [ANSWER AT A-2] [READ OUT POSTCODE FROM DATABASE]? Is this the postcode of your main UK site?**

Yes	1
No	2
Don't know	97
Refused	98



A8A) ASK IF POSTCODE IS INCORRECT (A8/2), OR PANEL THAT MOVED HEAD OFFICE (A-1/2)  
**Could you tell me the postcode of your [ANSWER AT A-2]'s main UK site please? WRITE IN**

	1
Refused	98

A9) ASK IF POSTCODE IS INCORRECT (A8/2), DON'T KNOW (A8/97) OR REFUSED (A8/98) OR PANEL THAT MOVED OFFICE (A-1/2)  
**Can I check, is your [ANSWER AT A-2]'s main UK site in...? SINGLE-CODE**

<b>England</b>	1
<b>Scotland</b>	2
<b>Wales</b>	3
<b>Northern Ireland</b>	4
DO NOT READ OUT: <b>None of the above</b> (E.G. CHANNEL ISLANDS, ISLE OF MAN)	5
Don't know	97

IF NONE OF THESE (CODE 5), THANK AND CLOSE

**Thank you for your time, but the survey is only for organisations that have their main UK sites in England, Scotland, Wales and Northern Ireland.**

DUMA9 USE INFO FROM A9 '1-4' OR, IF A9 'DK, USE INFO FROM SAMPLE

England	1
Scotland	2
Wales	3
Northern Ireland	4

A10) ASK ALL  
**Which of the following best describes your [ANSWER AT A-2]'s premises?**

READ OUT AND SINGLE CODE

<b>They are [A1=&gt;1:all separate from your or someone else's home</b>	1
<b>A1=&gt;1: Some but not all premises are separate from your or someone else's home</b>	2
<b>[A1=&gt;1;All] the [ANSWER AT A-2]'s premises are at my or someone else's home</b>	3
Refused	98

INTERVIEWER NOTE: IF RESPONDENT MENTIONS THAT THEY WORK OUT OF THEIR HOME AND DO NOT HAVE OTHER PREMISES, BUT THAT THEIR REGISTERED BUSINESS ADDRESS IS AT THEIR ACCOUNTANT'S PREMISES, CODE AS 'PREMISES AT THEIR HOME'

IF MULTI-SITE AND ALL HOME PREMISES (A1=>1 AND A10=3)

**Just to confirm. This is NOT about remote or hybrid working. If you or any of your staff are working at home as part of a remote or hybrid working policy, please DO NOT include these home sites as permanent sites of your [ANSWER AT A-2]. Would you like to change your answer to this question?**

A11) ASK TOP-UPS, PAST PANEL, OR PANEL IF OWNERSHIP CHANGED (A-1/4, 7)  
**How many working owners and partners does the [ANSWER AT A-2] have? Please include yourself if you are a working owner or partner.** NB: CODE NOT APPLICABLE IF THIS QUESTION IS NOT RELEVANT  
 INTERVIEWER NOTE: THIS DOES NOT INCLUDE SHAREHOLDERS THAT DO NOT WORK FOR THE COMPANY

	Enter number	DK	REF	N/A
A11 (owner/partners)		97	98	99

A11A) ASK IF 0 OR >10, or 97, 98 OR 99 IN A11  
**Which of the following, if any, best describe the ownership structure of your [ANSWER AT A-2]?**  
 READ OUT AND CODE ONE ONLY

<b>Owned by shareholders or by its' employees</b>	1
<b>Owned/run by members</b>	2
<b>It's a co-operative, so run by members/consumers/producers</b>	3
<b>Owned by another business i.e. a parent company</b>	4
<b>None of these, something else (SPECIFY)</b>	5
DNRO: Don't know	97
DNRO: Refused	98

A11B) ASK IF OWNED BY ANOTHER BUSINESS (A11A=4)  
**Is your [ANSWER AT A-2]'s parent company registered in the UK or overseas??** SINGLE CODE

UK	1
Overseas	2
Don't know	3
Refused	98

A12) TOP-UPS/PAST PANEL, OR PANEL IF OWNERSHIP CHANGED (A-1/7), AND IF MORE THAN ONE OWNER/PARTNER (A11 '2+')  
**Is your establishment part of a business that is majority-owned by the person or family who set it up? INTERVIEWER: THIS INCLUDES DESCENDANTS**

Yes	1
No	2
Don't know	3
Refused	98

A14<sup>3</sup>) ASK IF A12/1  
**Is the person or family that majority-owns your [ANSWER AT A-2] actively involved in the day-to-day management of the business?**  
 SINGLE-CODE

Yes	1
No	2
Don't know	3
Refused	98

NO A14-A15

A16 DELETED

ASK ALL TOP-UPS, PAST PANEL, OR PANEL THAT CHANGED NUMBERS OF DIRECTORS (A-1/4, 7)

A17) **How many [A5c/not 6: board-level directors and/or registered company officers and/or partners who are PAYE] [A5c/6: trustees] does your [ANSWER AT A-2] have who are in day to day control of your [ANSWER AT A-2] but who are not self-employed owners or partners?**

ENTER NUMBER (RANGE=1-999,999)_____
-------------------------------------

No other directors/partners.....96  
 Don't know ...97  
 Refused ... 98

ASK TOP-UPS IF VALUE AT A11 PLUS A17 IS TWO OR GREATER. ASK PANEL IF (A-1/4 OR A-1/7)

A18) **How many, if any, of your [A5c/not 6 and A17/1+: A17 RESPONSE directors, company officers or partners] [A5c/6 and A17/1+: A17 RESPONSE trustees] [A11/1+: and A11 RESPONSE owner and partners] are women? ENTER NUMBER (RANGE FOR TOP-UPS = ZERO UP TO VALUE AT A17 + A11)**

FILTER AS A18

A19) **How many, if any, of your [A5c/not 6 and A17/1+: A17 RESPONSE directors, company officers or partners] [A5c/6 and A17/1+: A17 RESPONSE trustees] [A11/1+: and A11 RESPONSE owners and partners] are from ethnic minority groups? ENTER NUMBER (RANGE FOR TOP-UPS = ZERO UP TO VALUE AT A17 + A11)**

	Enter number	DK	REF
A18 (women)		97	98
A19 (ethnic minority)		97	98

A20) ASK IF ANY BELONG TO ETHNIC MINORITY GROUPS (A19>0)  
**The following question will only be used to analyse business ownership at an aggregated level, and if you prefer not to answer it please say so. Which ethnic groups do the owners, partners or [A5c/not 6: directors] [A5c/6: trustees] who are from ethnic minority groups belong to?** PROMPT AS NECESSARY. MULTICODE.OK

White British (including white English, Scottish, Welsh or Northern Irish)	1
White Irish	2
Any other white background (PLEASE SPECIFY)	3
Mixed White and Black Caribbean	4
Mixed White and Black African	5
Mixed White and Asian	6
Any other mixed background [PLEASE SPECIFY]	7
Indian	8
Pakistani	9
Bangladeshi	10
Any other Asian background [PLEASE SPECIFY]	11
Black Caribbean	12
Black African	13
Any other Black background [PLEASE SPECIFY]	14
Chinese	15
Arab	16
Gypsy or Irish Traveller	17
Any other ethnic group [PLEASE SPECIFY]	95
Don't know	97
Refused	98

A21) ASK TOP-UPS IF NUMBER OF OWNERS AT A11/2+, OR PANEL IF CHANGE IN OWNERSHIP (A-1/7)  
**Is more than 50% of the [ANSWER AT A-2] owned by women?**

Yes	1
No	2
Don't know	97

A22) ASK TOP-UPS IF ONLY ONE OWNER OR DIRECTOR (A11 PLUS A17). ASK PANEL IF A\_1/4, 7 AND (A11 + A17 = 1)]  
**The following question will only be used to analyse business ownership at an aggregated level, and if you prefer not to answer it please say so. Which ethnic group [IF S2B/1: do you] [IF A11/1: does the owner] [IF A11/0 and A17/1: does the [A5c/not 6: director] [A5c/6 trustee] in charge] belong to?**  
 PROMPT AS NECESSARY. SINGLE CODE ONLY.

White British (including white English, Scottish, Welsh or Northern Irish)	1
White Irish	2
Any other white background (PLEASE SPECIFY)	3
Mixed White and Black Caribbean	4
Mixed White and Black African	5
Mixed White and Asian	6
Any other mixed background [PLEASE SPECIFY]	7
Indian	8
Pakistani	9
Bangladeshi	10
Any other Asian background [PLEASE SPECIFY]	11
Black Caribbean	12
Black African	13
Any other Black background [PLEASE SPECIFY]	14
Chinese	15
Arab	16
Gypsy or Irish Traveller	17
Any other ethnic group [PLEASE SPECIFY]	95
Don't know	97
Refused	98

A23) FILTER AS A22 IF S2B/1 DO NOT ASK  
**And is the [IF A11/1: owner] [IF A11/0 AND A17/1 AND A5c/NOT 6: director] [IF A11/0 AND A17/1 AND A5c/6: trustee] in charge a man or a woman? .....**

Man	1
Woman	2
Don't know	97
Refused	98

**SECTION B: EMPLOYMENT**

ASK ALL TOP UPS IF TRADING FOR AT LEAST ONE YEAR (NOT A6=2023); ASK ALL PAST PANEL; ASK PANEL IF A2x=2

B1) [TOP UPS AND PAST PANEL ONLY: **You said earlier that your [ANSWER AT A-2] currently has [INSERT A2 RESPONSE] employees on the payroll, excluding owners and partners.**] [TOP UPS, PAST PANEL, PANEL A2x=2 OR PANEL B1\_a=No]**How many employees did the [ANSWER AT A-2] have on the payroll 12 months ago [IF A1/2+ OR A1\_2022/2+: across all your UK sites] (still excluding owners and partners)?**

**READ OUT: Please...**

- INCLUDE ALL FULL AND PART TIME STAFF
- INCLUDE ALL TEMPORARY/CASUAL STAFF
- DO NOT INCLUDE ANY STAFF THAT WERE SUPPLIED BY AN EMPLOYMENT AGENCY
- EXCLUDE ANYONE WHO WORKED FOR YOU WHO WAS SELF-EMPLOYED, SUCH AS SELF-EMPLOYED CONTRACTORS
- EXCLUDE OWNERS/PARTNERS UNLESS THEY WERE PAYE,
- INCLUDE OTHER DIRECTORS THAT WERE PAYE

IF NECESSARY, IF AN EMPLOYMENT/RECRUITMENT AGENCY: **Just to clarify, any workers that you supplied to another business or organisation under a temporary contract should be counted as employees. That is everyone who was active on your books, as they were on your payroll.**

Enter Number (RANGE 0-9,999)
------------------------------

Don't know / Uncertain ...97

Refused ...98

B1a) TO COMPLETE IF FIGURE GIVEN AT B1  
INTERVIEWERS TO RE-ENTER NUMBER OF EMPLOYEES INTO RANGE. DO NOT ASK. SINGLE CODE ONLY

0-9	1
10-99	2
100-999	3
1000 or more	4

B2) ASK ALL IF UNCERTAIN HOW MANY EMPLOYEES EMPLOYED 12 MONTHS AGO (B1/X)  
**Could you please tell me, was it....? READ OUT. SINGLE-CODE**

More than currently	1
The same	2
Fewer	3
DO NOT READ OUT: Don't know	97

B3) ASK IF NUMBER OF EMPLOYEES 12 MONTHS AGO IS LESS THAN NUMBER OF EMPLOYEES CURRENTLY EMPLOYED BY TEN OR MORE (B1<A2)

**Could I just check that you employed fewer paid staff a year ago than you do now? SINGLE-CODE**

Yes	1	CONTINUE
No	2	RE-ASK B1 (BUT THEN SKIP B3 AND B4)

ASK IF NUMBER OF EMPLOYEES 12 MONTHS AGO IS GREATER THAN NUMBER OF EMPLOYEES CURRENTLY EMPLOYED BY TEN OR MORE (B1>A2)

B4) **Could I just check that you employed more paid staff a year ago than you do now?** SINGLE-CODE

Yes	1	CONTINUE
No	2	RE-ASK B1 (BUT THEN SKIP B3 AND B4)

ASK ALL

B5) **How many employees do you expect the [ANSWER AT A-2] to have on the payroll in the UK in twelve months' time (excluding owners and partners)?**

INCLUDE FULL AND PART TIME

INCLUDE TEMPORARIES/CASUALS, BUT NOT AGENCY STAFF

EXCLUDE SELF-EMPLOYED

EXCLUDE OWNERS/PARTNERS, BUT OTHER DIRECTORS COUNT AS EMPLOYEES

Enter Number (RANGE 0-9,999)
------------------------------

Don't know / Uncertain ...97  
Refused ...98

B5a) TO COMPLETE IF FIGURE GIVEN AT B5  
INTERVIEWERS TO RE-ENTER NUMBER OF EMPLOYEES INTO RANGE. DO NOT ASK. SINGLE CODE ONLY

0-9	1
10-99	2
100-999	3
1000 or more	4

ASK IF UNCERTAIN HOW MANY PEOPLE EXPECT TO EMPLOY IN 12 MONTH'S TIME (B5/97)

B6) **Could you tell me whether you expect it to be...?** READ OUT. SINGLE-CODE

<b>More than currently</b>	1
<b>About the same</b>	2
<b>Fewer</b>	3
DO NOT READ OUT: Don't know	97

SELECT COHORT AT RANDOM (AFFECTS FILTERING IN REST OF QUESTIONNAIRE)

Cohort		Answers questions at
Cohort A	1	C2f, C2g, C2h, E1-E12. K14-K15-M1a, M1b, M2-M3
Cohort B	2	G2-G8. R4 R4_b, R8a, R8_b, R8_c, R8_d
Cohort C	3	C3b, C4, C5, C5a, C4a, C4_a, C7, F8a-F11a, J3-J6a

**SECTION C: EXPORTS**

C0) ASK ALL PANEL/PAST PANEL WHERE C5\_a/3 in 2022 or C5\_a/3 in 2021 or C6/2 PRE-2021  
**When we spoke to [you] [NAME OF 2022 RESPONDENT] back in [MONTH/YEAR] we were told that your [ANSWER AT A-2] did not provide goods or services suitable for exporting. Is that still the case?**

Yes	1
No	2
Don't know	97

WHERE YES GO TO C2f IF COHORT A; SECTION F IF COHORT B OR C;  
 WHERE NO/DON'T KNOW CONTINUE

C1) ASK TOP UPS AND ALL PANEL/PAST PANEL EXCEPT WHERE C0/1  
**I'd now like to ask you a few questions about export activity. By this I mean any goods or services sold by you to an individual or organisation based outside of the UK.**

[ADD AS NECESSARY] **This includes transactions you might make with any branch or subsidiary that you have that is located outside of the UK.**

[ASK ALL] **In the past 12 months did your [ANSWER AT A-2] export any SERVICES outside of the UK? This could include commissions, royalties and licences (ADD IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). This does not include exports of goods.**

Yes	1
No	2
Don't know	97

C1a) ASK IF EXPORTED ANY SERVICES OUTSIDE OF THE UK (C1/1)  
**Approximately what percentage of your turnover in the last 12 months was accounted for by service exports? WRITE IN**

Enter Proportion (RANGE 0-100%)
---------------------------------

Don't know .....97  
 Refused ..... 98

C1b) ASK IF UNCERTAIN/DK AT C1a  
**Would you say it was....? READ OUT. SINGLE-CODE**

Up to 5% of turnover	1
Up to 10%	2
Up to 25%	3
Up to 50%	4
Up to 75%	5
Up to 90%	6
More than 90%	7
Don't know	97



C2) ASK TOP UPS AND ALL PANEL/PAST PANEL EXCEPT WHERE C0/1  
**And in the past 12 months did your [ANSWER AT A-2] export any GOODS outside of the UK? (ADD IF IN NORTHERN IRELAND: This includes sales to the Republic of Ireland). This does not include any exports of services.**

Yes	1
No	2
Don't know	97

C2a) ASK IF EXPORTED ANY GOODS OUTSIDE OF THE UK (C2/1)  
**Approximately what percentage of your turnover in the last 12 months was accounted for by goods exports? WRITE IN**

Enter Proportion (RANGE 0-100%)

Don't know .....97  
 Refused ..... 98

C2b) ASK IF UNCERTAIN/DK AT C2a  
**Would you say it was....? READ OUT. SINGLE-CODE**

Up to 5% of turnover	1
Up to 10%	2
Up to 25%	3
Up to 50%	4
Up to 75%	5
Up to 90%	6
More than 90%	7
Don't know	97

C2\_A) ASK IF EXPORTED ANY GOODS OUTSIDE OF THE UK (C2/1)  
**In the process of selling those goods, are there any services that are provided alongside the product as part of the sale of the good? For example, an ongoing subscription for maintenance and repair, or training, or a related software subscription such as cloud storage with a phone.**

Yes	1
No	2
Don't know	97

ASK IF CURRENTLY SELL OUTSIDE UK (C1/1 OR C2/1)

C2c) **In the past 12 months have you exported to...** READ OUT AND MULTICODE 1-2

IF NECESSARY: **In which overseas geographical areas do you have customers?**

<b>The European Union?</b>	1
<b>The USA?</b>	2
<b>EFTA Countries?</b> (IF ASKED, THESE ARE SWITZERLAND, ICELAND, LIECHTENSTEIN AND NORWAY)	3
<b>Canada?</b>	4
<b>Turkey?</b>	5
<b>South Korea?</b>	6
<b>China?</b>	7
<b>India?</b>	8
<b>The rest of the world?</b>	9
NI ONLY: <b>Republic of Ireland</b> [PLACE AT TOP FOR NI]	10
Don't know	97
Refused	98

ASK IF EXPORTS TO THE EU AND OTHER COUNTRIES (C2c/1 AND (ANY OF 2-9, 97))

C2d) **Approximately what percentage of your turnover in the last 12 months was accounted for by exports to the European Union?** WRITE IN

**This is percentage of your total sales across your UK [ANSWER AT A\_2] and not the percentage of your total export sales**

Enter Proportion (RANGE 0-100%)
---------------------------------

Don't know ..... 97

Refused ..... 98

ASK IF UNCERTAIN/DK AT C2d

C2e) **Would you say it was...?** READ OUT. SINGLE-CODE

Up to 5% of turnover	1
Up to 10%	2
Up to 25%	3
Up to 50%	4
Up to 75%	5
Up to 90%	6
More than 90%	7
Don't know	97

ASK IF TOP UP NON-EXPORTERS (C1/NOT 1 AND C2/NOT 1) OR PREVIOUS PANEL NON-EXPORTERS (C1/NOT 1 AND C2/NOT 1 EXCEPT C0/1) OR PANEL NON-EXPORTERS WHO HAVE NOT ANSWERED THIS QUESTION PREVIOUSLY (C1/NOT 1 AND C2/NOT 1 EXCEPT C0/1 OR C5\_a\_2015 etc 'NULL')

C5\_a) **Which of the following statements applies to your [ANSWER AT A-2] regarding exporting? READ OUT.**  
SINGLE-CODE

<b>We have never exported and do not have a product or service suitable for export</b>	3
<b>We have never exported but have a suitable product or service that could be developed for export</b>	2
<b>We have exported but not within the last 12 months</b>	1
DO NOT READ OUT: Don't know	97

COHORT A - ASK ALL

C2f) **Do you sell goods or services or licence your product or services to the rest of the UK, i.e.**

(IF IN ENGLAND) **Scotland, Wales and Northern Ireland?**

(IF IN SCOTLAND) **England, Wales and Northern Ireland?**

(IF IN WALES) **England, Scotland and Northern Ireland?**

(IF IN NORTHERN IRELAND) **England, Scotland and Wales?**

Yes	1
No	2
Don't know	97
Refused	98

COHORT A - ASK ALL

C2g) **In the past 12 months, have you directly imported goods or services from... READ OUT AND MULTICODE 1-2**

<b>The European Union?</b>	1
<b>Non-European Union countries?</b>	2
Neither	3
Don't know	97
Refused	98

COHORT A - ASK ALL

C2h) **Do you buy in goods or services from other countries in the UK, i.e.**

(IF IN ENGLAND) **Scotland, Wales and Northern Ireland?**

(IF IN SCOTLAND) **England, Wales and Northern Ireland?**

(IF IN WALES) **England, Scotland and Northern Ireland?**

(IF IN NORTHERN IRELAND) **England, Scotland and Wales?**

Yes	1
No	2
Don't know	97
Refused	98

NO C3a

COHORT C - ASK TOP-UPS AND PREVIOUS PANEL CURRENTLY SELLING OUTSIDE UK (C1/1 OR C2/1) OR THAT HAVE EVER EXPORTED (C5\_a/1); ASK PANEL THAT HAVE EVER EXPORTED (C1/1 OR C2/1 OR DATABASE=EXPORTED) AND HAVE NOT ANSWERED THIS QUESTION IN PREVIOUS YEARS (C3b\_2015 etc = NULL)

C3b) **In which year did your [ANSWER AT A-2] first sell goods or services, or license its products overseas?**

	Enter Year (4 DIGITS STARTING 10-20)	DK	REF
C3b (first started exporting)		97	98

C4) COHORT C - ASK IF DON'T KNOW (97) AT C3b  
**Was it... READ OUT. SINGLE CODE ONLY**

<b>In the last five years?</b>	1
<b>6 – 10 years ago?</b>	2
<b>11 – 20 years ago?</b>	3
<b>More than 20 years ago?</b>	4
Don't know	97

C5) COHORT C - ASK ALL EXPORTERS THAT HAVE BEEN SELLING OUTSIDE UK FOR MORE THAN TWO YEARS ((C1/1 OR C2/1) AND VALUE WHICH IS NOT 2021-22 OR DK/REF AT C3b)  
**During the time you have been selling or licensing products overseas, have you had overseas sales every year or have there been some years where you haven't made any sales at all to overseas customers?**  
SINGLE-CODE

Overseas sales every year (since started doing business overseas)	1
Some years with no overseas sales	2
Don't know	97

C5a) COHORT C - ASK ALL (TOP UPS, PAST PANEL, PANEL) IF HAVE EXPORTED BUT NOT WITHIN THE LAST 12 MONTHS (C5\_a '1') OR PANEL IF HAVE NOT EXPORTED BUT HAVE EVER EXPORTED OR PREVIOUSLY SAID THEY'VE EVER EXPORTED (PANEL WHERE C1/2 AND C2/2 AND DATABASE=EXPORTED OR C5\_a\_2015 etc '1')  
**Why have you not exported [IF PANELIST OR TOP UP IF C5\_a '1': in the last 12 months]? DO NOT PROMPT MULTI-CODE OK**

COHORT C - ASK ALL IF SOME YEARS WITH NO OVERSEAS SALES (C5 '2')  
**Why have there been some years with no overseas sales? DO NOT PROMPT. MULTI-CODE OK**

Don't have the time to pursue exporting	1
Lack knowledge of how best to export	2
Exporting is too risky	3
Exporting is not profitable	4
Prefer to concentrate on UK markets	5
Only have occasional 'one-off' orders from overseas	6
Other (SPECIFY)	95
Don't know	97
Refused	98
Don't recall they were exporting goods or services before	99

COHORT C - ASK IF CURRENTLY SELL OUTSIDE UK (C1/1 OR C2/1) OR EXPORTED BUT NOT IN THE LAST 12 MONTHS (C5\_a/1) OR PANEL THAT HAVE EXPORTED IN PREVIOUS YEARS (2015/2016/2017/2018/2019/2020/2021: C1/1 OR C2/1)

C4\_a) **Do you have a formal written export strategy or plan?** SINGLE CODE.

Yes	1
No	2
Don't know	97

COHORT C - ASK IF CURRENTLY SELL OUTSIDE UK (C1/1 OR C2/1)

C4a) **Do you plan to increase your levels of exports over the next few years?** SINGLE CODE.

Yes	1
No	2
Don't know	97

COHORT C - ASK IF DO NOT CURRENTLY SELL OUTSIDE UK (C1/NOT 1 AND C2/NOT 1) AND HAVE A SUITABLE PRODUCT (C5\_a/1,2) AND PANEL WHERE PREVIOUSLY EXPORTED AND PREVIOUSLY ANSWERED c5\_A/1 (C5\_a\_2015...2022/1)

C7) **Do you have plans to [C5\_a/1:restart][C5\_a/2:start] exporting or licensing your goods or services outside the UK? IF YES: Do you think this will be in the next 12 months or further in the future?** SINGLE-CODE

Yes - next 12 months	1
Yes – further in the future	2
No	3

**SECTION D: SOCIAL ENTERPRISES**

ASK ALL

D1) **I would now like to ask about the goals of your [TEXT AT A-2]. Of the following, which have been important to your [TEXT AT A-2] over the past five years? RANDOMISE ORDER OF B-F, A SHOULD ALWAYS COME FIRST. MULTI-CODE.**

<b>(a) financial goals, e.g., relating to turnover or profit</b>	1
<b>(b) offering solutions to problems of health and/or ageing</b>	2
<b>(c) fighting economic and/or social exclusion, e.g. by supporting vulnerable or disadvantaged people</b>	3
<b>(d) working to enhance civic and community engagement</b>	4
<b>(e) serving the members of your organisation such as in a mutual, a social or a sports club</b>	5
<b>(f) offering solutions to environmental problems, such as climate change or food waste</b>	6
None of these	97
Don't know	98

NO D2

ASK IF ANY OF D1/2-6

D3) **To help understand the importance of the different goals, can you tell me, are these social or environmental goals, ... READ OUT. SINGLE CODE ONLY. NB: IF THEY HAVE BOTH SOCIAL AND ENVIRONMENTAL GOALS, FOCUS ON THE MOST IMPORTANT**

<b>Your [TEXT AT A-2]'s only concern</b>	1
<b>Your [TEXT AT A-2]'s primary concern</b>	2
<b>Equal to financial or other goals</b>	3
<b>Secondary to financial or other goals, or</b>	4
<b>Non-existent</b>	5
Don't know	97
Refused	98

NO D4-D8

ASK IF ANY OF D1/2-6

D9) **Over the past five financial years, has your [TEXT AT A-2] received income from the following sources?. READ OUT. MULTICODE**

<b>a. Trading or commercial activity, that is selling products or services to the public or other organisations</b>	1
<b>b. Grants and donations (NOT INCLUDING COVID GRANTS)</b>	2
<b>c. Membership fees</b>	3
<b>d. Other sources (SPECIFY)</b>	4

ASK IF MORE THAN ONE IN D9

D9b) **Over the past five financial years, approximately what has been the average proportion of income received from [SHOW D9 RESPONSES]? READ OUT AND PROMPT FOR AN APPROXIMATE PERCENTAGE FOR EACH (0-100%)**

	% (0-100)		DON'T KNOW	REFUSED
<b>a. Trading or commercial activity, that is selling products or services to the public or other organisations</b>			97	98
<b>b. Grants and donations</b>			97	98
<b>c. Membership fees</b>			97	98
<b>d. Other sources (SPECIFY)</b>			97	98

ASK ALL

D11) **Taking into account all sources of income in the last financial year, did you generate a profit or surplus?**

Yes	1
No	2
Don't know	97
Refused	98

ASK IF GENERATED A PROFIT/SURPLUS IN THE LAST FINANCIAL YEAR (D11/1) AND IF ANY OF D1/2-6

D11a) **What was done with this profit or surplus, did you use at least half of it to further your....**

- (IF D1/2, 3, 4, 5) **social goals?**
- (IF D1/6) **environmental goals?**
- (IF D1/6 AND D1/2, 3, 4, 5) **social/environmental goals?**

Yes	1
No	2
Don't know	97
Refused	98

NO D12-D16

ASK IF ANY OF D1/2-6

D17) (IF NO EMPLOYEES A2/0 OR UNREGISTERED TOP-UPS) **Do you have any principles or commitments in place for what you do with profits or surpluses?**

(OTHERS) **Do you have any rules or restrictions in place for what you do with profits or surpluses?**

Yes	1
No	2
Don't know	97
Refused	98

ASK ALL THAT HAVE RULES OR RESTRICTIONS (D17/1) AND IF ANY OF D1/2-6

D17a) (IF NO EMPLOYEES A2/0 OR UNREGISTERED TOP-UPS) **Do these principles or commitments say to use at least half of the profits or surpluses to further....**

(OTHERS) **Do these rules or restrictions say that you have to use at least half of the profits or surpluses to further....**

- (IF D1/2, 3, 4, 5) **social goals?**
- (IF D1/6) **environmental goals?**
- (IF D1/6 AND D1/2, 3, 4, 5) **social/environmental goals?**

Yes	1
No	2
Don't know	97
Refused	98



## SECTION E: ENERGY USAGE

SECTION E IS ASKED OF COHORT A AND C NOW

COHORT A AND C:

ASK IN GREAT BRITAIN ONLY (NOT NORTHERN IRELAND), WITH SOLELY DOMESTIC PREMISES (A10/3)

E0) **You said earlier that [IF A1/2+ AND A10/3: all your sites are based in homes rather than at separate business premises][IF A1/1 AND A10/3:your [ANSWER AT A-2] operates from a home, rather than a separate business premises. Can I confirm that is correct?**

SINGLE CODE

Yes	1
No	2
Don't know	97
Refused	98

COHORT A AND C:

.....ALL WITH SEPARATE BUSINESS PREMISES (A10/NOT 3 OR E0/2, 97, 98)

E1) **I would now like to ask you some questions about your premises and energy provision. These are on behalf of the Department for Energy Security and Net Zero (DESNZ). If you are currently working at home we want you to think about your main business premises and not your home premises when answering. Which of the following describe your [ANSWER AT A-2]'s main premises? READ OUT. SINGLE-CODE**

<b>Rented from a private or commercial landlord</b>	1
<b>Owned by you or your [ANSWER AT A-2]</b>	2
<b>Leased</b>	3
<b>Other (SPECIFY)</b>	4
Don't know	97
Refused	98

NO E2-E6

COHORT A: ASK IN GREAT BRITAIN ONLY (NOT NORTHERN IRELAND),

ALL WITH SEPARATE BUSINESS PREMISES (A10/NOT 3 OR E0/2, 97, 98)

E6a) **Has your business installed any energy efficiency measures in the last 12 months? READ OUT. SINGLE-CODE**

Yes	1
No	2
Don't know	97
Refused	98

E6b2) COHORT A: (ASK if 'yes' to E6a)  
**What prompted you to take action?** DO NOT PROMPT. MULTI-CODE OK

To reduce my energy costs	1
To reduce costs for my tenants	2
Equipment needed replacing	3
Recommendation from third party (e.g. energy supplier, energy services contractor, Carbon Trust etc)	4
An energy efficiency audit / meet internal targets	5
Moved premises	6
Climate change/environmental/reputational concerns	7
To improve Energy Performance Certificate (EPC) rating and or to comply with the Private Rented Sector Regulations	8
To improve the working conditions for staff (e.g. better temperature control)	9
Other (SPECIFY)	95
Don't know	97
Refused	98

FILTER AS E1

COHORT A:

E8) **As far as you are aware, do your main premises have any smart or advanced meters for gas or electricity?**

(ADD AS NECESSARY) **Both smart meters and advanced meters record information on energy usage and send meter readings directly to energy suppliers. This means meter readings are provided automatically and remotely rather than having to be read off manually from the meter.**

SINGLE CODE ONLY. PROBE TYPE OF ENERGY THEY HAVE SMART/ADVANCED METERS FOR

Yes – both gas and electricity	1
Yes – gas only	2
Yes – electricity only	3
No – do not have smart/advanced meters	4
Don't know	97
Refused	98

E9a) COHORT A: ASK IF HAVE ANY SMART/ADVANCED METERS (E8/1-3)  
**Does your [ANSWER AT A-2] make use of any technologies that use smart/advanced meter data to help control your energy use? This could include an energy management app, online platform/portal or smart energy management service that provides frequent access to your energy data to inform decision making<sup>4</sup>?**

Yes	1
No	2
Don't know	97
Refused	98

E10) ASK ALL COHORT C IN GB  
(ADDITIONAL SCRIPT IF NOT ASKED E1) **I would now like to ask you a question about your main premises and energy provision. This is on behalf of DESNZ.**

IF NECESSARY: **DESNZ is the Department for Energy Security and Net Zero**

(ALL IN FILTER) **Which, if any, of the following energy schemes are you aware of?** READ OUT.  
MULTICODE OK

<b>The Energy Technology List?</b>	1
<b>Enhanced Capital Allowances?</b>	2
(ENGLAND AND WALES ONLY) <b>The Private Rented Sector Energy Efficiency Regulations?</b>	3
<b>The Renewable Heat Incentive?</b>	4
(SCOTLAND ONLY) <b>Business Energy Scotland?</b>	5
(SCOTLAND ONLY) <b>Business Energy Scotland SME Loan and Cashback Scheme?</b>	6
<b>Energy Savings Opportunity Scheme</b>	7
<b>Workplace Charging Scheme for electric vehicle charge points</b>	8
<b>Other (SPECIFY)</b>	95
None of these	96
Don't know	97
Refused	98

COHORT C.....ALL WITH SEPARATE BUSINESS PREMISES (A10/NOT 3 OR E0/2, 97, 98)

AND INCLUDE E10/1-4

E11) **Which of the following energy-related activities has your [ANSWER AT A-2] done to date?** READ OUT. MULTICODE OK

(ASK IF E10/1) <b>Used the Energy Technology List to purchase a product?</b>	1
(ASK IF E10/2) <b>Claimed Enhanced Capital Allowances to get tax relief for energy efficient products?</b>	2
(ASK IF E10/3) <b>Made or experienced changes to buildings as a result of the Private Rented Sector Energy Efficiency Regulations?</b>	3
(ASK IF E10/4) <b>Received payments under the Renewable Heat Incentive?</b>	4
(ALL IN FILTER) <b>Installed a low carbon heating system e.g. heat pumps, biomass, solar thermal?</b>	5
(ALL IN FILTER) <b>Installed an electric vehicle chargepoint?</b>	6
(ALL IN FILTER) <b>Made or experienced changes to buildings as a result of the Energy Savings Opportunity Scheme?</b>	7
None of these	96
Don't know	97
Refused	98

- E12) ASK ALL COHORT C IN GB. DO NOT ASK IF E11/5  
**Are you planning to install a low carbon heating system, for example heat pumps, biomass or solar thermal, or any energy efficiency measures in any of your premises in the next 12 months?**  
PROBE AND CODE ONE ONLY

Yes – heating system only	1
Yes – energy efficiency measures only	2
Yes - both	3
Neither	4
Don't know	97
Refused	98

**SECTION F: TAXATION**

NO F1-F4

ASK ALL

F5) **Do you have a formal written business plan? IF YES: Is this kept up to date? SINGLE-CODE**

Yes – kept up to date	1
Yes – but not kept up to date	2
No	3
Don't know	97
Refused	98

ASK ALL

F6) **Which of the following UK taxes is your [ANSWER AT A-2] liable to submit returns to HMRC for? READ OUT. SINGLE CODE FOR EACH**

	YES	NO	DK	REF
<b>a. (DO NOT ASK UNREGISTERED SAMPLE) VAT</b>	1	2	97	98
<b>b. (SOLE/PARTNER ONLY) Income tax self-assessment for the self-employed or partnerships</b>	1	2	97	98
<b>c. (COMPANIES/OTHER ONLY) Company tax, also known as Corporation Tax</b>	1	2	97	98

NO F7

IF PAY VAT (F6a/1)

F8a) **In which of these ways does your [ANSWER AT A-2] keep records for VAT? READ OUT. MULTICODE 1-3, 95**

IF PAY SELF-ASSESSMENT (F6b/1)

F8b) **In which of these ways does your [ANSWER AT A-2] keep records for income tax self-assessment? READ OUT. MULTICODE 1-3, 95**

IF PAY COMPANY TAX (F6c/1)

F8c) **In which of these ways does your [ANSWER AT A-2] keep records for company tax? READ OUT. MULTICODE 1-3, 95**

	F8A. VAT	F8B SELF-ASSESSMENT	F8C COMPANY TAX
<b>Record keeping software?</b>	1	1	1
<b>Spreadsheets e.g. excel?</b>	2	2	2
<b>Paper-based records?</b>	3	3	3
Other (SPECIFY)	95	95	95
(DNRO) Do not keep records for tax	96	96	96
(DNRO) Don't know, accountant handles this for them	99	99	99
(DNRO) Don't know	97	97	97
Refused	98	98	98

IF KEEP RECORDS FOR SELF-ASSESSMENT (F8b/1, 2, 3, 95)

F9b) **How regularly does your [ANSWER AT A-2] keep records for income tax self-assessment?** READ OUT. SINGLE CODE

<b>Weekly or more often</b>	1
<b>1-2 times per month</b>	2
<b>About every 2 months</b>	3
<b>Quarterly</b>	4
<b>About every 6 months</b>	5
<b>Annually</b>	6
<b>Less often</b>	7
Other	95
(DNRO) Don't know, varies	97
Refused	98

ASK COHORT C ONLY, IF PAY VAT (F6a/1)

F8d) **Do you make your VAT submissions via 'Making Tax Digital for VAT'?** PROBE. SINGLE CODE

Yes – use MTD for VAT	1
No	2
(DNRO) Don't know, accountant handles this for them	96
(DNRO) Don't know	97
Refused	98

F8e) deleted

IF PAY SELF-ASSESSMENT (F6b/1)

F8f) **Are you aware of Making Tax Digital for Income Tax Self-Assessment which HMRC is introducing from 2026?** SINGLE CODE

Yes	1
No	2
Refused	98

ASK ALL in COHORT C ONLY

F10) **Do you use any technologies or web-based software to ...?** READ OUT AND MULTI CODE 1, 2 SINGLE CODE 3, 97, 98

<b>Sell to customers online</b>	1
<b>Manage the business</b>	2
<b>Neither</b>	3
Don't know	97
Refused	98

F11) ASK ALL WHO USE TECHNOLOGIES (F10/1, 2)  
**Which of the following management technologies do you use?** READ OUT 1-6. MULTICODE OK

(DO NOT ASK IF F8a-c/1) <b>Accountancy software</b>	1
<b>HR management software</b>	2
<b>Enterprise Resource Planning (ERP) software</b>	3
<b>Customer relationship management (CRM)</b>	4
<b>Electronic invoicing (e-invoicing)</b>	5
<b>Videoconferencing software</b>	6
None of these	96
Don't know	97
Refused	98

F12<sup>5</sup>) ASK ALL IN SCOTLAND  
**Do you receive any of the following non-domestic rates relief?** READ OUT 1-5. MULTICODE OK

<b>Small Business Bonus Scheme (SBBS)</b>	1
(ASK IF CHARITY A0/1) <b>Charity rate relief</b>	2
<b>Transitional relief</b>	3
<b>Business Growth Accelerator</b>	4
<b>Unoccupied Property</b>	5
<b>Fresh start</b>	6
<b>Other rate relief (SPECIFY WHICH)</b>	95
None of these	96
Not applicable – business premises is a home	99
Don't know	97
Refused	98

F13) ASK IF RECEIVE SBBS RELIEF (F12/1)  
**Approximately what percentage relief do you get from the Small Business Bonus Scheme?** WRITE IN

Enter Proportion (RANGE 0-100%)
---------------------------------

Don't know .....97  
 Refused ..... 98

**SECTION G: OBSTACLES**

NO G1

ASK ALL COHORT B ONLY

G2) **I'd like to ask you now some questions about issues, obstacles or difficulties that your [ANSWER AT A-2] might face in achieving your business objectives. Which of the following would you say are major obstacles to the success of your [ANSWER AT A-2] in general? READ OUT. RANDOMISE CODES 1 BUT KEEP CODES 12 AND 13 TOGETHER IN THE SAME ORDER. MULTICODE OK 1-13, 95**

<b>Obtaining finance</b>	1
<b>Taxation, VAT, PAYE, National Insurance, business rates</b>	2
<b>Staff recruitment and skills</b>	3
<b>Regulations/red tape</b>	4
<b>Availability/cost of suitable premises</b>	5
<b>Competition in the market</b>	6
<b>Workplace pensions</b>	7
<b>Late payment</b>	8
<b>UK exit from the EU</b>	9
<b>National Living Wage</b>	10
<b>The level of energy prices</b>	12
<b>Other issues relating to costs (SPECIFY)</b>	13
<b>Any other major issues or obstacles? (SPECIFY)</b>	95
None of these	96
Don't know/No opinion	97
Refused	98

NO G3-G7

ASK IF MENTION UK EXIT FROM THE EU AS A MAJOR OBSTACLE (G2/9)

G8) **I am going to read out a list of potential reasons why your [ANSWER AT A-2] faces major obstacles because of the UK's exit from the EU. For each, please tell me whether you have experienced this READ OUT. RANDOMISE ORDER a-e. SINGLE CODE ONLY FOR EACH.**

		Experienced	Not experienced	Don't know	Refused
a	<b>Difficulty in recruiting/retaining skilled EU labour</b>	1	2	97	98
b	<b>Difficulty in recruiting/retaining unskilled EU labour</b>	1	2	97	98
c	<b>Decrease in investment/greater difficulty in raising capital</b>	1	2	97	98
d	<b>Increase in cost of imports from the EU</b>	1	2	97	98
e	<b>Increase in cost of exports to the EU</b>	1	2	97	98
f	<b>Other major obstacles not mentioned already (SPECIFY: What other major obstacles relating to the UK's exit from the EU have you already experienced?)</b>	1	2	97	98



## SECTION H: FINANCE

H1 Deleted  
No H2

ASK ALL

H3) **Are you currently using any of these types of external finance for your [ANSWER AT A-2]? READ OUT. RANDOMISE ORDER OF READING 1-14 BUT KEEP 8 AND 9, AND 13 AND 14 TOGETHER. MULTICODE OK**

<b>Bank overdraft facility</b>	1
<b>Commercial mortgage</b> IF NECESSARY: a mortgage to buy business premises, not domestic premises	2
<b>Credit cards</b>	3
<b>Equity Finance, including crowd funding</b> IF NECESSARY: this is where a share of the business is sold to investors or other people. And crowd funding is where small investors go online to finance a small business in exchange for a share of that business	4
<b>Factoring/invoice discounting</b> IF NECESSARY: Factoring is where a business sells its order book to a debt collector at a discount (for example. if they have £100k in orders, they may sell the right to invoice this for £90k). Invoice discounting is a loan secured against a business's order book	5
<b>Leasing or hire purchase</b> IF NECESSARY: Leasing is where you rent, usually with a service contract; hire purchase is similar but ultimately you own the equipment or vehicle	6
<b>Loan from a bank, building society or other financial institution not directly related to Coronavirus</b>	7
<b>Loan from a bank, building society or other financial institution directly related to Coronavirus</b>	8
<b>Loan from family/friend</b>	9
<b>Loan from business partner/directors/owner</b>	10
<b>Loan from a peer to peer platform</b> IF NECESSARY: Or P2P, similar to crowd funding, except small investors lend to a business at an agreed interest rate rather than taking a share in the business. A Funding Circle is P2P	11
<b>Government or local authority grants or schemes not including any directly related to Coronavirus</b>	12
<b>Government or local authority grants or schemes directly related to Coronavirus</b>	13
<b>Other finance (SPECIFY)</b>	95
None of these	96
Don't know	97
Refused	98

ASK IF EQUITY FINANCE MENTIONED (H3/4)

H3a) **Who did you obtain your equity finance from?** READ OUT 1-7, 95. M/C 1-7, 95

<b>From a Business Angel?</b>	1
<b>From a Venture Capitalist/VC?</b>	2
<b>From any other third-party organisation/ another business?</b>	3
<b>From within your [ANSWER AT A-2]?</b>	4
<b>From a member of family or a friend?</b>	5
<b>From a crowd funding platform?</b>	6
<b>Public equity (e.g issue of shares on public market)</b>	7
<b>Other form of equity (SPECIFY)</b>	95
Don't know	97
Refused	98

ASK ALL

H4) **Have you tried to obtain external finance for your [ANSWER AT A-2] in the past 12 months?**

READ OUT: **This can include loans from friends and family and active re-arrangement of overdraft facility.** SINGLE CODE ONLY. IF YES, PROBE WHETHER TRIED TO OBTAIN EXTERNAL FINANCE ONCE OR MORE THAN ONCE IN THE LAST 12 MONTHS

Yes - once	1
Yes – more than once	2
No	3
Don't know	97
Refused	98

ASK ALL THAT APPLIED IN LAST 12 MONTHS (H4/1-2). DO NOT ASK PANEL IF APPLIED IN 2015/2016/2017/2018/2019/2020/2021

H4a) **Was this the first time your [ANSWER AT A-2] had applied for external finance, or had you sought external finance before this?** SINGLE CODE ONLY

First time	1
Have sought external finance before this	2
Don't know	97
Refused	98

ASK ALL THAT APPLIED IN LAST 12 MONTHS (H4/1-2):

- H5) **Please can you tell me all the types of finance that your [ANSWER AT A-2] sought in the last 12 months? Please include applications for all types of finance including where you failed to obtain it. Please include renewals and extensions to existing facilities, e.g. to overdrafts, credit cards and loans. PROMPT IF NECESSARY. MULTICODE OK**

Bank overdraft facility	1
Commercial mortgage	2
Credit cards	3
<b>Equity Finance, including crowd funding</b> IF NECESSARY: this is where a share of the business is sold to investors or other people. And crowd funding is where small investors go online to finance a small business in exchange for a share of that business	4
<b>Factoring/invoice discounting</b> IF NECESSARY: Factoring is where a business sells its order book to a debt collector at a discount (for example, if they have £100k in orders, they may sell the right to invoice this for £90k). Invoice discounting is a loan secured against a business's order book	5
<b>Leasing or hire purchase</b> IF NECESSARY: Leasing is where you rent, usually with a service contract; hire purchase is similar but ultimately you own the equipment or vehicle	6
Loan from a bank, building society or other financial institution	7
Loan from family/friend	8
Loan from business partner/directors/owner	9
<b>Loan from a peer to peer platform</b> IF NECESSARY: Or P2P, similar to crowd funding, except small investors lend to a business at an agreed interest rate rather than taking a share in the business. A Funding Circle is P2P	10
Other government or local authority finance grants or schemes	11
Other finance (SPECIFY)	95
Don't know	97
Refused	98

ASK IF EQUITY FINANCE MENTIONED (H5/4)

- H5a) **Who did you seek equity finance from? READ OUT 1-10, 95. M/C 1-10, 95**

<b>From a Business Angel?</b>	1
<b>From a Venture Capitalist/VC?</b>	2
<b>From any other third-party organisation/ another business?</b>	3
<b>From within your [ANSWER AT A-2]?</b>	4
<b>From a member of family or a friend?</b>	5
<b>From a crowd funding platform?</b>	6
<b>Public equity (e.g issue of shares on public market)</b>	7
(WALES ONLY) <b>Development Bank of Wales</b>	8
<b>Other Government equity scheme (SPECIFY)</b>	9
<b>Other form of equity (SPECIFY)</b>	95
Don't know	97
Refused	98

ASK ALL THAT APPLIED IN LAST 12 MONTHS (H4/1-2)

H7a) **In the last 12 months, what did you try to obtain finance for? Was it...** READ OUT AND CODE ONE FOR EACH

	Yes	No	Unsure	Prefer not to answer
<b>(i) For working capital or cashflow?</b>	1	2	97	98
<b>(ii) For other reasons?</b>	1	2	97	98

ASK ALL THAT SOUGHT FINANCE FOR OTHER REASONS (H7a/ii/1)

H7b) **Did you try and obtain finance in the last 12 months for any of these reasons?** READ OUT AND CODE ALL THAT APPLY

<b>Acquisition of capital equipment or vehicles</b>	1
<b>Buying, renting, leasing or improving buildings or land</b>	2
<b>Investment in a new or significantly improved process</b>	3
<b>Investment in a new or significantly improved goods or services</b>	4
<b>Marketing</b>	5
<b>Staff training or development</b>	6
<b>Any other type of investment in your [ANSWER AT A-2] (PLEASE WRITE IN)</b>	7
<b>Other reasons (PLEASE WRITE IN)</b>	95
Unsure	97
Prefer not to answer	98

ASK IF SOUGHT FINANCE FOR CASHFLOW (H7a/i/1)

H8) **Which of these describe the reason for seeking external finance for cashflow?** READ OUT AND CODE ALL THAT APPLY

<b>To cover a short-term gap until funds were received from customers</b>	1
<b>To cover a short-term gap due to unexpected expense e.g. late payment from a supplier</b>	2
<b>As a safety net, just in case</b>	3
<b>Working capital to fund general growth</b>	4
<b>Other (PLEASE WRITE IN)</b>	95
Unsure	96
Prefer not to answer	97

ASK ALL WHO SOUGHT FINANCE IN THE LAST 12 MONTHS (H4/1-2)

H9a) **In total, how much external finance did you seek in the last 12 months? (ADD IF H5/1: This includes the size of your overdraft facility, even if you do not use it all.)**

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

£									
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Don't know 97  
Refused 98

**INTERVIEWER TO RE-ENTER FIGURE AS TEXT E.G. 3 THOUSAND; 300 THOUSAND; 3 MILLION; 30 MILLION ETC.**

--

ASK IF DK OR REF AT H9A

H9c) **Which of these ranges does the amount of finance that you sought fall into?** READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY

<b>Less than £5,000</b>	1
<b>£5,000 to £24,999</b>	2
<b>£25,000 to £99,999</b>	3
<b>£100,000 to £499,999</b>	4
<b>£500,000 to £999,999</b>	5
<b>£1 million to £4,999,999</b>	6
<b>£5 million to £9,999,999</b>	7
<b>£10 million or more</b>	8
Don't know	97
Refused	98

ASK ALL WHO SOUGHT FINANCE IN THE LAST 12 MONTHS (H4/1-2)

H9ci) **Did you obtain all, some or none of the finance that you sought in the last 12 months?** SINGLE CODE

All	1
Some	2
None	3
Don't know	4
Refused	5

ASK IF OBTAINED SOME OF THE FINANCE SOUGHT (H9ci=2)

H9d) **So in total, how much external finance did you obtain in the last 12 months?** (ADD IF h5/1: This includes the size of your overdraft facility, even if you do not use it all.)

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

£									
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Don't know 97  
 Refused 98

**INTERVIEWER TO RE-ENTER FIGURE AS TEXT E.G. 3 THOUSAND; 300 THOUSAND; 3 MILLION; 30 MILLION ETC.**

--

ASK IF DK OR REF AT H9d

H9f) **Which of these ranges does the amount of finance that you obtained fall into?** READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY

<b>Zero</b>	1
<b>Less than £5,000</b>	2
<b>£5,000 to £24,999</b>	3
<b>£25,000 to £99,999</b>	4
<b>£100,000 to £499,999</b>	5
<b>£500,000 to £999,999</b>	6
<b>£1 million to £4,999,999</b>	7
<b>£5 million to £9,999,999</b>	8
<b>£10 million or more</b>	9
Don't know	97
Refused	98

ASK IF SOUGHT FINANCE FOR CASHFLOW AND INVESTMENT (H7a/i/1 AND H7b/1-7,95) AND OBTAINED ANY FINANCE (H9ci/2, 4, 5)

H9g) **Of the amount of external finance you sought for investment purposes in the last 12 months, approximately what proportion did you end up obtaining from these external sources?** READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY

<b>0% (none)</b>	1
<b>1-19 %</b>	2
<b>20-39%</b>	3
<b>40-59%</b>	4
<b>60-79%</b>	5
<b>80-99%</b>	6
<b>100%</b>	7
Don't know	97
Refused	98

ASK IF SOUGHT FINANCE FOR CASHFLOW AND INVESTMENT AND OBTAINED LESS THAN 100% AT H9g OR OBTAINED NONE ((H7a/i/1 AND H7b/1-7,95) AND (H9g/1-6 OR H9ci/3)) OR IF SOUGHT FINANCE FOR INVESTMENT ONLY ((H7a/i/2 AND H7b/1-7,95) AND (H9ci/2, 3))

H9h) **Which of these describe the impact of not receiving all the external finance you needed for your investment plans?** READ OUT. MULTICODE OK 1-4, 95

<b>You received finance from internal sources in order to make the investment as planned</b>	1
<b>You went ahead with the investment, but on a smaller scale than planned</b>	2
<b>You went ahead with the investment, but it was delayed</b>	3
<b>You did not go ahead with the investment at all</b>	4
Other (SPECIFY)	95
There was no impact	96
Don't know	97
Refused	98

ASK IF SOUGHT FINANCE FOR CASHFLOW AND INVESTMENT (H7a/i/1, 97 AND H7B/1-7,95) AND OBTAINED ANY FINANCE (H9ci/2, 4, 5)

H9i) **Of the amount of external finance you sought for cashflow purposes in the last 12 months, approximately what proportion did you end up obtaining from these external sources? READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY**

0% (none)	1
1-19 %	2
20-39%	3
40-59%	4
60-79%	5
80-99%	6
100%	7
Don't know	97
Refused	98

ASK IF SOUGHT FINANCE FOR CASHFLOW AND INVESTMENT AND OBTAINED LESS THAN 100% AT H9i OR OBTAINED NONE ((H7a/i/1 AND H7b/1-7,95) AND (H9i/1-6 OR H9ci/3)) OR IF SOUGHT FINANCE FOR CASHFLOW ONLY ((H7a/i/1 AND H7a/ii/2) AND (H9ci/2, 3))

H9j) **Which of these describe the impact of not receiving all the external finance you needed for cashflow? READ OUT. MULTICODE OK 1-5**

You paid your suppliers late/ later	1
You paid you staff late	2
You used existing Credit cards	3
You used existing agreed overdraft balance	4
You tightened payment terms for customers	5
Other (SPECIFY)	6
No impact	96
Don't know	97
Refused	98

NO H10-H94

ASK ALL

H95 (IF APPLIED FOR FINANCE IN LAST 12 MONTHS (H4/1-2)) **Apart from the finance you applied for, did you have a need for more finance in the last 12 months that you did not apply for?**

(IF DID NOT APPLY FOR FINANCE IN LAST 12 MONTHS (H4/NOT 1-2) **Although you did not apply for it, have you had a need for finance in the last 12 months?**

Yes	1
No	2
Don't know	97

H96 ASK IF HAD A NEED FOR FINANCE BUT DID NOT APPLY (H95/1)  
**Which of these, if any, are reasons why you did not apply for this [ADD IF H4/1-2 additional] finance in the last 12 months? READ OUT. MULTICODE OK**

H97 ASK IF MORE THAN ONE ANSWER AT H96  
**And which of these is the main reason for not applying for finance? READ OUT IF NECESSARY. SINGLE CODE ONLY**

	H96	H97
<b>You thought you would be rejected</b>	1	1
<b>You thought it would be too expensive</b>	2	2
<b>You don't want to take on additional risk</b>	3	3
<b>Now is not the right time because of economic conditions</b>	4	4
<b>You didn't know where to find the appropriate finance you needed</b>	5	5
<b>Poor credit history</b>	6	6
<b>The decision would have taken too long/too much hassle</b>	7	7
<b>Bank forms and literature hard to understand</b>	8	8
<b>You thought you'd be asked to provide too much security</b>	9	9
Other (SPECIFY)	95	95
Don't know	97	97
Refused	98	98

ASK IF HAD A NEED FOR FINANCE BUT DID NOT APPLY (H95/1), OR IF APPLIED BUT DID NOT OBTAIN ANY FINANCE IN LAST 12 MONTHS (H9ci/2,3)

H97a (IF APPLIED BUT DID NOT OBTAIN ANY FINANCE IN LAST 12 MONTHS (H9ci/2,3) **You mentioned that you were unable to obtain [H9ci=2:all][H9ci=3:any] finance in the last 12 months. Did this mean that you were unable to do any of the following, that you would have done had you obtained finance? READ OUT. MULTICODE OK**

(IF HAD A NEED FOR FINANCE BUT DID NOT APPLY (H4/NOT 1, 2 AND H95/1) **Did not applying for finance mean you were unable to do any of the following, that you would have done had you obtained finance? READ OUT. MULTICODE OK**

<b>Use the finance for working capital or cashflow</b>	1
<b>Acquire capital equipment or vehicles</b>	2
<b>Buy, rent, lease or improve buildings or land</b>	3
<b>Invest in a new or significantly improved process</b>	4
<b>Invest in a new or significantly improved goods or services</b>	5
<b>Marketing</b>	6
<b>Staff training or development</b>	7
<b>Staff recruitment</b>	8
<b>Any other type of investment in your [ANSWER AT A-2] (SPECIFY)</b>	9
None of these	96
Don't know	97
Refused	98

NO SECTION I



**SECTION J: INNOVATION**

J1) ASK ALL  
**I'd now like you to think about innovation within your [ANSWER AT A-2]. Has your [ANSWER AT A-2] introduced any new or significantly improved goods in the last three years? This excludes the resale of goods purchased from other businesses, or changes of a solely aesthetic nature.**

Yes	1
No	2
Don't know	97
Refused	98

J1a) ASK ALL  
**Has your [ANSWER AT A-2] introduced any new or significantly improved services in the last three years?**

Yes	1
No	2
Don't know	97
Refused	98

J2) ASK IF INTRODUCED NEW OR SIGNIFICANTLY IMPROVED GOODS OR SERVICES (J1/1 OR J1a/1)  
**Were any of these new or significantly improved goods and services innovations new to the market, or were they all just new to your [ANSWER AT A-2]? SINGLE-CODE.**

At least some new to the market	1
All just new to the [ANSWER AT A-2]	2
Don't know	97
Refused	98

J3) ASK ALL IN COHORT C  
**Has your [ANSWER AT A-2] introduced any new or significantly improved processes for producing or supplying goods or services in the last three years?**

Yes	1
No	2
Don't know	97
Refused	98

J4) ASK IF INTRODUCED NEW OR SIGNIFICANTLY IMPROVED PROCESSES (J3/1)  
**Were any of these new or significantly improved processes new to your industry, or were they all just new to your [ANSWER AT A-2]? SINGLE-CODE.**

At least some new to the industry	1
All just new to the [ANSWER AT A-2]	2
Don't know	97
Refused	98

J5) ASK ALL IN COHORT C  
**Has your [ANSWER AT A-2] invested in R&D in the last three years?**

NB: 'R&D' STANDS FOR RESEARCH AND DEVELOPMENT

Yes	1
No	2
Don't know	97
Refused	98

J5a) ASK ALL WHO INVESTED IN R&D (J5/1)  
**How much have you invested in R&D in the last 3 years?**

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

£									
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Don't know 97  
 Refused 98

**INTERVIEWER TO RE-ENTER FIGURE AS TEXT E.G. 3 THOUSAND; 300 THOUSAND; 3 MILLION; 30 MILLION ETC.**

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J5c) ASK IF DK OR REF AT J5a  
**Which of these ranges does the amount of R&D expenditure in the last 3 years fall into? READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY**

<b>Less than £5,000</b>	1
<b>£5,000 to £24,999</b>	2
<b>£25,000 to £99,999</b>	3
<b>£100,000 to £499,999</b>	4
<b>£500,000 to £999,999</b>	5
<b>£1 million to £4,999,999</b>	6
<b>£5 million to £9,999,999</b>	7
<b>£10 million or more</b>	8
Don't know	97
Refused	98

J6) ASK ALL IN COHORT C  
**Have you applied for or received R&D tax credits in the last 3 years? SINGLE-CODE.**

Applied for, not received	1
Received	2
Neither applied for nor received	3
Don't know	4
Refused	5

COHORT C WHERE APPLIED OR RECEIVED (J6/1, 2)

J6a) **Have you applied for or received an R&D grant from any of the following at any time?** READ OUT. SINGLE-CODE.

	Applied for but not received	Received	Neither applied nor received	DO NOT READ OUT: Don't know	DO NOT READ OUT: Refused
<b>UK Research and innovation (including Innovate UK, Research Councils, for example...)</b>	1	2	3	4	5
<b>UK government department</b>	1	2	3	4	5
<b>European Union</b>	1	2	3	4	5
<b>Local Enterprise Partnership/Growth Hubs</b>	1	2	3	4	5

ASK ALL IN NORTHERN IRELAND

J7) **And have you applied for or received Innovation Vouchers in the last 3 years?** SINGLE-CODE.

Applied for, not received	1
Received	2
Neither applied for nor received	3
Don't know	4
Refused	5

**SECTION K: BUSINESS SUPPORT**

ASK ALL

- K2) **Now I would like to move on to discuss the sources of advice and information you use when running your [ANSWER AT A-2]. In the last 12 months have you sought external advice or information on matters affecting your [ANSWER AT A-2]? We are only interested when this has been more than a casual conversation.**

Yes	1
No	2
Don't know	97

ASK ALL RECEIVING ADVICE/INFORMATION IN ENGLAND AND WALES (K2/1)

- K3) **Was the assistance or support that you used...? READ OUT 1-3. SINGLE CODE ONLY**

<b>Information relating to the day to day running of your [ANSWER AT A-2]?</b>	1
<b>Strategic advice to help introduce a stepped change to grow your [ANSWER AT A-2] in terms of profitability or numbers employed, or to increase productivity?</b>	2
<b>Both of these?</b>	3
Neither of these	96
Don't know	97

ASK ALL WHO HAVE RECEIVED INFORMATION/ADVICE (K2/1)

- K5) **(What did you seek information or advice about in the last year?) DO NOT READ OUT. MULTICODE 1-20, 95**

	K5
Business growth	1
E-commerce/technology	2
Employment law/redundancies	3
Exporting	4
Financial advice e.g. how and where to get finance	5
Financial advice e.g. accounting, for general running of [ANSWER AT A-2]	6
Health and Safety	7
Importing	8
Improving business efficiency/productivity	9
Innovation	10
Legal issues	11
Management/leadership development	12
Marketing	13
Reducing or off-setting carbon emissions/other emissions	14
Regulations	15
Relocation	16
Taking action to protect the environment/reducing impact on the environment	17
Tax/national insurance law and payments	18
Trade mission attendance	19
Training/skills needs	20
Workplace pensions	21
Business survival or operation through Coronavirus COVID-19 pandemic and beyond	22
Other (SPECIFY)	95
Don't know	97

K7) ASK ALL WHO HAVE RECEIVED INFORMATION/ADVICE (K2/1)  
**Where have you been for information or advice on the running of your [ANSWER AT A-2] in the last 12 months?) DO NOT READ OUT. MULTICODE OK**

	K7
Accountant	1
Bank	2
Business networks/trade associations	3
(WALES ONLY) Business Wales	4
Consultant/general business adviser	5
Chamber of Commerce	6
(Specialist) financial adviser	7
Friend or family member	8
.GOV website	9
Internet search/google/other websites	10
(NORTHERN IRELAND ONLY) Inter-Trade Ireland	11
(NORTHERN IRELAND ONLY) Invest NI	12
Local Council/Authority	13
Local Enterprise Partnerships	14
(NORTHERN IRELAND ONLY) NI Business Info website	15
Solicitor/lawyer	16
Tax agent	17
The Pensions Regulator	18
Universities/other education sector	19
Work colleagues	20
Find business support website	21
Other (SPECIFY)	95
None/have not sought information or advice/will not seek it	96
Don't know	97

NO K8-K9

NO K9b-c

K9d) ASK ALL WHO INFORMATION/ADVICE (K2/1)  
**(How as the information or advice mainly delivered to you?) READ OUT. SINGLE CODE ONLY**

<b>Face to face</b>	1
<b>Through a website</b>	2
<b>By email</b>	3
<b>On the phone</b>	4
<b>Social media</b>	5
Other (SPECIFY)	95
Don't know	97

NO K10a-c

ASK ALL WHO HAVE RECEIVED INFORMATION/ADVICE IN ENGLAND OR WALES OR NORTHERN IRELAND (K2/1)

K12a) **Did you pay for the information or advice you received?**

ADD IF NECESSARY **If you received funding or a grant which fully or partially paid for the information or advice this counts as paying for it...** SINGLE CODE ONLY

Yes	1
No	2
Don't know	97

ASK ALL THAT PAID FOR INFORMATION/ADVICE (K12a/1)

K12b) **Approximately how much have you paid for external information or advice in the past 12 months?** RECORD EXACT FIGURE BELOW, IF NOT SURE, ASK FOR AN APPROXIMATE FIGURE. ALLOWED RANGE £0-999,999

£							
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Don't know 97  
Refused 98

**INTERVIEWER TO RE-ENTER FIGURE AS TEXT E.G. 3 THOUSAND; 300 THOUSAND; 3 MILLION; 30 MILLION ETC.**

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ASK IF DK OR REF AT K12b

K12d) **Which of these ranges describes approximately how much you paid for information or advice in the last 12 months?** READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY

Less than £100	1
£100 - £499	2
£500 - £999	3
£1,000 - £2,499	4
£2,500 - £4,999	5
£5,000 – £9,999	6
£10,000 - £49,999	7
£50,000 - £99,999	8
£100,000 or more	9
Don't know	97
Refused	98

ASK ALL IN NORTHERN IRELAND ONLY.

K10d) **[IF NORTHERN IRELAND AND PANEL AND APPROACHED IN 2021: In the last 12 months, have you][ALL IN NORTHERN IRELAND EXCEPT WHERE APPROACHED IN 2021: Have you ever] approached Invest NI for any form of assistance, including information or guidance, to help develop your [ANSWER AT A-2]?**

Yes	1
No	2
Have not heard of Invest NI	3
Don't know	4

K10e) ASK IF NEVER APPROACHED INVEST NI (K10d/2)  
**Is there any particular reason why you have not approached Invest NI? WRITE IN**

No particular reason	1
Other (SPECIFY)	2
Don't know	3

K10f) ASK ALL THAT APPROACHED INVEST NI (K10d/1)  
**On the last occasion you approached Invest NI, how satisfied or dissatisfied were you with the information or advice you received? PROMPT AS NECESSARY FOR VERY/FAIRLY (DIS) SATISFIED. SINGLE CODE ONLY**

Very satisfied	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	4
Very dissatisfied	5
Not applicable – did not receive information/advice	96
Don't know	97
Refused	98

K10d\_w) ASK ALL IN WALES ONLY  
 [IF WALES AND PANEL AND APPROACHED IN 2021: **In the last 12 months, have you**][ALL IN WALES EXCEPT WHERE APPROACHED IN 2021: **Have you ever**] **approached Business Wales for any form of assistance, including information or guidance, to help develop your [ANSWER AT A-2]?**

Yes	1
No	2
Have not heard of Business Wales	3
Don't know	4

K10e\_w) ASK IF NEVER APPROACHED BUSINESS WALES (K10dw/2)  
**Is there any particular reason why you have not approached Business Wales? WRITE IN**

No particular reason	1
Other (SPECIFY)	2
Don't know	3

K10f\_w) ASK ALL THAT APPROACHED BUSINESS WALES (K10dw/1)  
**On the last occasion you approached Business Wales how satisfied or dissatisfied were you with the information or advice you received? PROMPT AS NECESSARY FOR VERY/FAIRLY (DIS) SATISFIED. SINGLE CODE ONLY**

Very satisfied	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	4
Very dissatisfied	5
Not applicable – did not receive information/advice	96
Don't know	97
Refused	98

NO K11-K12

NO K13

NO K16-K20

K21 ASK ALL IN SCOTLAND ONLY  
**Are you aware of the Scottish Business Pledge?** IF YES: **Is your [ANSWER AT A-2] signed up to this?** SINGLE CODE ONLY

Yes – signed up	1
Aware, not signed up	2
No – not aware of it	3
Don't know	97

K21\_w ASK ALL IN WALES ONLY  
**Are you aware of the Welsh Government Economic Contract?** IF YES: **Is your [ANSWER AT A-2] signed up to this?** SINGLE CODE ONLY

Yes – signed up	1
Aware, not signed up	2
No – not aware of it	3
Don't know	97

K22. ASK ALL EMPLOYERS IN SCOTLAND (A2>0)  
**Excluding volunteers, apprentices and interns, are all your employees aged 18 or over paid at or above £10.90 an hour?**

Yes,	1
No	2
Don't know	97
Refused	98

NO K23

K24) ASK ALL EMPLOYERS IN SCOTLAND (A2>0)  
**Does your [ANSWER AT A-2] offer any of the following working hours arrangements for employees?** READ OUT. MULTICODE 1-8

<b>Flexitime (flexible working hours)</b>	1
<b>An annualised hours contract</b>	2
<b>Term-time working</b>	3
<b>Job sharing</b>	4
<b>A nine-day fortnight</b>	5
<b>A four and a half day week</b>	6
<b>Zero-hour contracts</b>	7
<b>On-call working</b>	8
None of these	96
Don't know	97
Refused	98

NO K25



K26 ASK ALL IN SCOTLAND ONLY  
**Do you consider your [ANSWER AT A-2] to be actively involved in your local community?**

Yes	1
No	2
Don't know	97

## SECTION L: PUBLIC SECTOR

L questions removed

**SECTION M: PAYMENT**

COHORT A - ASK ALL

M1) **Trade credit gives customers time to pay after they have received the goods or services. Can I ask, do you.....?** READ OUT. SINGLE CODE FOR EACH

	Yes	No	Don't know
<b>(a) Give your customers trade credit?</b>	1	2	97
<b>(b) Receive trade credit from your suppliers?</b>	1	2	97

ASK COHORT A ONLY IF GIVE OR RECEIVE CREDIT (M1a/1 OR M1b/1), AND HAVE LESS THAN 50 EMPLOYEES (A2/0-49)

M2) **Do you feel that you can satisfactorily resolve a payment dispute with a larger business? By larger business, we mean one with 50 or more employees, and by dispute we mean something you consider to be an unfair payment practice.**

Yes	1
No	2
Don't know	97
Refused	98

ASK COHORT A ONLY THAT IF GIVE CREDIT (M1a/1)

M3) **Do you have a problem with customers paying you later than you require them to in your normal terms of business?** PROMPT AS NECESSARY. SINGLE CODE

Big problem	1
Small problem	2
No problem	3
Don't know	97
Refused	98

NO M4-M5

ASK ALL IN SCOTLAND THAT RECEIVE CREDIT (M1b/1)

M6) **Does your [ANSWER AT A-2] engage with the prompt payment code?**

Yes	1
No	2
Don't know	97
Refused	98

**SECTION N: TRAINING**

ASK ALL THAT EMPLOY STAFF (A2>0)

N1) **Over the past 12 months has your [ANSWER AT A-2] arranged or funded any formal off-the-job, or informal on-the-job, training or development for employees? By off-the-job training we mean training away from the individual’s immediate work position, whether on your premises or elsewhere. IF YES: PROBE FOR WHETHER FORMAL OFF THE JOB, INFORMAL ON THE JOB, OR BOTH. SINGLE CODE ONLY**

Yes – formal off the job	1
Yes – informal on the job	2
Yes - Both	3
No	4
Don't know	5

NO N3-N4

NO N6-N12

ASK ALL THAT EMPLOY STAFF (A2>0) IN SCOTLAND

N13) **Does your [ANSWER AT A-2] engage with any of the following schemes or practices? READ OUT. MULTICODE 1-5**

<b>Modern apprenticeships, with funding through Skills Development Scotland</b>	1
<b>Investors in Young People</b>	2
<b>Fair Start Scotland</b>	3
<b>No One Left Behind</b>	4
<b>Developing Young Workforce (DYW) Regional Groups</b>	5
None of these	96
Don't know	97
Refused	98

ASK EMPLOYERS ONLY (A2>0) IN SCOTLAND

N15) **In the past 12 months, have you involved your staff in the decision-making process regarding the operation and future of your business? Which of the following apply? READ OUT. MULTICODE 1-4**

<b>You have directly consulted staff via email, phone call, letter or similar</b>	1
<b>You have consulted staff via trade unions or staff associations</b>	2
<b>You have chosen not to consult staff</b>	3
<b>You have not been able to consult staff</b>	4
None of these	96
Don't know	97
Refused	98

NO SECTION O

**SECTION P: TURNOVER**

ASK ALL

P1) **Can you please tell me the approximate turnover of your [ANSWER AT A-2] in the past 12 months [IF A1/2+ OR A1\_2021/2+: across all your UK sites]? RECORD EXACT FIGURE BELOW, IF NOT SURE, ASK FOR AN APPROXIMATE FIGURE. ALLOWED RANGE £0-£99,999,999**

IF NECESSARY: **To clarify, turnover is the total income received by the business from all sales of goods and services charged to third parties. CHECK THAT THE VALUE GIVEN IS NOT THE PROFIT MADE, BUT ALL SALES**

READ VALUE BACK TO RESPONDENT

£									
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Don't know 97  
Refused 98

**INTERVIEWER TO RE-ENTER FIGURE AS TEXT E.G. 3 THOUSAND; 300 THOUSAND; 3 MILLION; 30 MILLION ETC.**

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ASK IF DK OR REF AT P1

P1b) **Which of these ranges does your turnover fall into? READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY**

Less than £85,000	1	Less than 85 thousand pounds
£85,000 - £249,999	2	Between 85 thousand and 250 thousand pounds
£250,000 - £499,999	3	Between 250 thousand and 500 thousand pounds
£500,000 - £999,999	4	Between half a million and a million pounds
£1m – £1.99m	5	Between a million and two million pounds
£2m - £4.99m	6	Between two million and five million
£5m - £9.99m	7	Between five million and ten million pounds
£10m - £14.99m	8	Between ten million and 15 million pounds
£15m - £24.99m	9	Between 15 million and 25 million pounds
£25m or more	10	25 million or more
Don't know	97	
Refused	98	

P1c) ASK PANEL WHERE P1\_2022/NOT DK OR REF:  
**When we talked to you in [MONTH/YEAR – 2022] we recorded turnover for your [ANSWER AT A-2] in the band [P1\_BAND\_2022]. Does this sound about right for that time?**

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

P1c\_1 WHERE P1c=2 (NO) OR P1\_2022/DK OR REF (P1c/2 OR P1\_2022/97, 98):  
**What was the approximate turnover for your [ANSWER AT A\_2] for the preceding 12 month period at [MONTH/YEAR – 2022]? RECORD EXACT FIGURE BELOW, IF NOT SURE, ASK FOR AN APPROXIMATE FIGURE. ALLOWED RANGE £0-£99,999,999**

CHECK THAT THE VALUE GIVEN IS NOT THE PROFIT MADE, BUT ALL SALES

£									
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- Don't know 97
- Refused 98

**INTERVIEWER TO RE-ENTER FIGURE AS TEXT E.G. 3 THOUSAND; 300 THOUSAND; 3 MILLION; 30 MILLION ETC.**

P1d WHERE DON'T KNOW/REFUSED IN P1c\_1 (97, 98)  
**Which of these ranges would your turnover for the preceding 12 month period have fallen into in [MONTH/YEAR]? READ OUT UNTIL ANSWER GIVEN. SINGLE CODE ONLY**

Less than £85,000	1	Less than 85 thousand pounds
£85,000 - £249,999	2	Between 85 thousand and 250 thousand pounds
£250,000 - £499,999	3	Between 250 thousand and 500 thousand pounds
£500,000 - £999,999	4	Between half a million and a million pounds
£1m – £1.99m	5	Between a million and two million pounds
£2m - £4.99m	6	Between two million and five million
£5m - £9.99m	7	Between five million and ten million pounds
£10m - £14.99m	8	Between ten million and 15 million pounds
£15m - £24.99m	9	Between 15 million and 25 million pounds
£25m or more	10	25 million or more
Don't know	97	
Refused	98	

P2) ASK ALL TOP UPS AND PAST PANEL TRADING FOR AT LEAST ONE YEAR (A6/NOT 2023) OR PANEL WHERE P1/DK or REF or P1\_2022/DK or REF or P1c/DK/REF or P1c\_1/DK or REF)  
**Compared with the previous 12 months, has your turnover in the past 12 months increased, decreased or stayed roughly the same? SINGLE-CODE**

Increased	1
Decreased	2
Stayed the same	3
Don't know	97
Refused	98

P3) ASK IF TURNOVER HAS INCREASED / DECREASED (P2/1-2)  
**By approximately what percentage did your turnover (IF P2/1) increase (IF P2/2) decrease in the past 12 months, compared with the previous 12 months?** PROMPT FOR AN APPROXIMATION

Enter percentage (IF DECREASED P2 '2', RANGE = 0-100%; IF INCREASED P2 '1', RANGE = 0-999%)
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Don't know ....97  
 Refused ... 98

P4) ASK IF DECREASED BY MORE THAN 50% (P2 '2' AND P3 '51-100')  
**You said that your turnover decreased by (ANSWER AT P3)%. That means your turnover decreased by more than half compared with the previous 12 months. Is that correct?**

Yes	1
No	2
Don't know	97
Refused	98

IF NO AT P4, REASK P3

P5) ASK IF INCREASED BY MORE THAN 100% (P2 '1' AND P3 '101-999')  
**You said that your turnover increased by (ANSWER AT P3)%. That means your turnover has more than doubled compared with the previous 12 months. Is that correct?**

Yes	1
No	2
Don't know	97
Refused	98

IF NO AT P5, REASK P3

P6) ASK IF DON'T KNOW HOW MUCH TURNOVER INCREASED/DECREASED AT P3 (P3 '97')  
**Would you say it [TEXT SUBSTITUTION: (IF P2/1) increased (IF P2/2) decreased] by up to 10%, up to 20% or by more than 20%?**

Up to 10%	1
Up to 20%	2
More than 20%	3
Don't know	97

P7) ASK ALL  
**In the next 12 months do you expect your turnover to increase, decrease, stay roughly the same?**  
 SINGLE-CODE

Increase	1
Decrease	2
Stay the same	3
Don't know	97
Refused	98

P8) ASK IF EXPECT TURNOVER TO INCREASE / DECREASE (P7/1-2)  
**By approximately what percentage do you expect your turnover to (IF P7/1) increase (IF P7/2) decrease in the next 12 months?** PROMPT FOR AN APPROXIMATION  
 INTERVIEWER NOTE: IF DON'T KNOW, PROMPT WITH BANDS

Enter percentage (IF DECREASE P7 '2', RANGE = 0-100%; IF INCREASE P7 '1', RANGE = 0-999%)

Don't know ...97  
 Refused ... 98

P9) ASK IF EXPECT TO DECREASE BY MORE THAN 50% (P7 '2' AND P8 '51-100'). OTHERS GO TO FILTER AT P10  
**You said that you expect your turnover to decrease by (ANSWER AT P8). That means you expect your turnover to decrease by more than half what it is now. Is that correct?**

Yes	1
No	2
Don't know	97
Refused	98

IF NO AT P9, REASK P8

P10) ASK IF EXPECT TO INCREASE BY MORE THAN 100% (P7 '1' AND P8 '101-999')  
**You said that you expect your turnover to increased by (ANSWER AT P3. That means you expect your turnover to more than doubled compared with what it was in the last 12 months. Is that correct?**

Yes	1
No	2
Don't know	97
Refused	98

IF NO AT P10, REASK P8

P11) ASK IF DON'T KNOW HOW MUCH TURNOVER WILL INCREASE/DECREASE AT P8 (P8 '97')  
**Would you say it will [TEXT SUBSTITUTION: (IF P7/1) increase (IF P7/2) decrease] by up to 10%, up to 20% or by more than 20%? SINGLE CODE**

Up to 10%	1
Up to 20%	2
More than 20%	3
Don't know	4

P11\_1) ASK IF EXPECT TURNOVER TO INCREASE OR DECREASE (P7/1, 2)  
**To what extent do you consider the UK's exit from the EU to be a factor in the [TEXT SUBSTITUTION: (IF P7/1) increase (IF P7/2) decrease] in turnover that you expect to experience in the next 12 months? SINGLE-CODE**

A major factor	1
A minor factor	2
Not a factor	3
Don't know	97
Refused	98

Section Q: Rested for Year 9

**SECTION R: FUTURE INTENTIONS**

R1) ASK ALL  
**I would like to finish off by asking a few questions about the plans for your [ANSWER AT A-2] over the next three years. Over the next three years, do you aim to grow the sales of your [ANSWER AT A-2]? SINGLE-CODE**

Yes	1
No	2

R1a) ASK ALL THAT INTEND TO GROW (R1/1)  
**By approximately what percentage do you aim to have grown your sales in three years time? READ OUT IF NECESSARY. SINGLE-CODE**

1-9%	1
10-24%	2
25-49%	3
50-74%	4
75-99%	5
100% or more	6
Don't know	95
Refused	96

R2) ASK ALL  
**How likely is it that you will approach external finance providers in the next three years? PROBE FOR VERY/FAIRLY/NOT VERY LIKELY/NOT AT ALL LIKELY. SINGLE CODE**

Very likely	1
Fairly likely	2
Not very likely	3
Not at all likely	4
Don't know	97



ASK ALL IN COHORT B ONLY

R4) **Does your [ANSWER AT A-2] plan to do any of the following over the next three years?**  
 READ OUT. MULTICODE. RANDOMISE ORDER OF ASKING BUT KEEP CODES 3 AND 4, CODES 9, 10 AND 11, AND CODES 13 AND 14 TOGETHER. ALWAYS ASK CODE 8 BEFORE CODE 12

BUSINESSES WITH EMPLOYEES (A2/>0): <b>Increase the skills of the workforce</b>	1
BUSINESSES WITH EMPLOYEES (A2/>0): <b>Increase the leadership capability of managers</b>	2
<b>Capital investment (in premises, machinery etc.) in the UK</b>	3
<b>Capital investment (in premises, machinery etc.) in overseas markets</b>	4
<b>Develop and launch new products/services</b>	5
<b>Introduce new working practices</b>	6
<b>Invest in R&amp;D</b>	7
<b>[(C1/1, 97, 98 OR C2/1, 97, 98): Increase export sales or begin selling to new overseas markets][C1/2 AND C2/2: Begin selling to new overseas markets]</b>	8
BUSINESSES WITH EMPLOYEES (A2/>0): <b>Recruitment of new staff in the UK</b>	9
BUSINESSES WITH EMPLOYEES (A2/>0): <b>Recruitment of new staff in overseas offices</b>	10
BUSINESSES WITH EMPLOYEES (A2/>0): <b>Transfer of existing staff from UK to overseas offices</b>	11
ASK IF EXPORT(C1/1, 97 OR C2/1 97); <b>Decrease export sales or reduce the number of overseas markets you sell to</b> IF NECESSARY IF RESPONDENT HAS MENTIONED INCREASING EXPORT SALES: This could be at any point in the next 3 years. It may be that you have plans to both increase and decrease export levels at different times, but also you may be planning to increase exports but to fewer overseas markets	12
<b>Work towards a target to reduce carbon/greenhouse gas emissions/other emissions</b>	13
None of these	96
Don't know	97
Refused	98

COHORT B - ASK IF PLAN TO WORK TOWARDS A TARGET TO REDUCE GREENHOUSE GAS EMISSIONS (R4/13)

R4\_b) **Does your greenhouse gas emission target include your [ANSWER AT A-2]'s supply chain?**  
 PROMPT AS NECESSARY. MULTICODE.

Yes	1
No	2
Don't know	97
Refused	98

NO R5-R8

- R8a) COHORT B - ASK IF HAVE ANY PLANS AT R4/1-12  
**Have any of these plans been affected by the UK exit from the EU? IF YES: Which plans?**  
 SHOW THOSE MENTIONED AT R4. READ AGAIN IF NECESSARY. MULTICODE.

Increase the skills of the workforce	1
Increase the leadership capability of managers	2
Capital investment (in premises, machinery etc.) in the UK	3
Capital investment (in premises, machinery etc.) in overseas markets	4
Develop and launch new products/services	5
Introduce new working practices	6
Invest in R&D	7
Increase export sales or begin selling to new overseas markets	8
Recruitment of new staff in the UK	9
Recruitment of new staff in overseas offices	10
Transfer of existing staff from UK to overseas offices	11
Decrease export sales or reduce the number of overseas markets you sell to	12
Work towards a target to reduce carbon/greenhouse gas emissions/other emissions	13
No – none of these have been affected	96
Don't know	97
Refused	98

- R8\_b) COHORT B - ASK IF HAVE ANY PLANS AT R4/1-13  
**Have any of these plans been affected by issues relating to rising costs?**  
 SINGLE CODE

Yes	1
No	2
Don't know	97
Refused	98

- R8\_c) COHORT B - ASK IF ISSUES RELATING TO RISING COSTS (R8\_b/1)  
**What have been the issues relating to rising costs that have affected plans?**  
 DO NOT READ OUT. PROBE FULLY AND MULTICODE

Increased energy costs e.g. gas, electricity, lpg, oil	1
Other cost increases	2
Expectations of cost increases	3
Uncertainty relating to cost increases	4
Don't know	97
Refused	98

COHORT B - ASK IF HAVE ANY PLANS AT R4/1-13 AND AFFECTED BY RISING COSTS (R4/1-13 AND R8\_b/1)

R8\_d)

**Which of your [ANSWER AT A-2]'s plans have been affected by rising costs?**  
SHOW THOSE MENTIONED AT R4. READ AGAIN IF NECESSARY. MULTICODE.

Increase the skills of the workforce	1
Increase the leadership capability of managers	2
Capital investment (in premises, machinery etc.) in the UK	3
Capital investment (in premises, machinery etc.) in overseas markets	4
Develop and launch new products/services	5
Introduce new working practices	6
Invest in R&D	7
Increase export sales or begin selling to new overseas markets	8
Recruitment of new staff in the UK	9
Recruitment of new staff in overseas offices	10
Transfer of existing staff from UK to overseas offices	11
Decrease export sales or reduce the number of overseas markets you sell to	12
Work towards a target to reduce carbon/greenhouse gas emissions/other emissions	13
No – none of these have been affected	96
Don't know	97
Refused	98

**SECTION U: END**

U1) ASK ALL  
(ENGLAND) ...the Department for Business and Trade

(SCOTLAND) ...the Scottish Government

(NORTHERN IRELAND) ...Invest NI

(WALES) ... the Welsh Government

would like to carry out a further survey in about a year’s time, to see how your [ANSWER AT A-2] is progressing. Would you be willing to help with that research? SINGLE-CODE

Yes	1
No	2
Maybe	97

U1c) ASK TOP-UPS, OR IF INTERVIEWED DIFFERENT RESPONDENT FROM 2017/2018/2019/2020/2021 (INTRO 2)  
**Would you like us to email you a link to the survey report when it is published on the internet in late summer 2024?**

Yes	1
No	2

U1a) ASK TOP-UPS, IF INTERVIEWED DIFFERENT RESPONDENT FROM 2017/2018/2019/2020/2021/2022 (INTRO 2), OR IF DID NOT SUPPLY ALTERNATIVE NUMBER IN 2022 – ONLY ASK IF AGREE TO REINTERVIEW AT U1  
**Is there an alternative number we might try next year (ADD IF LANDLINE: such as a mobile) in case we can’t reach you on this one?**

ENTER NUMBER TWICE. IF DO NOT MATCH, RE-ENTER

No number 96  
Refused 98

U1b) ASK TOP-UPS, IF INTERVIEWED DIFFERENT RESPONDENT FROM 2017/2018/2019/2020/2021/2022 (INTRO 2), OR IF DID NOT SUPPLY EMAIL IN 2022 – ONLY ASK IF AGREE TO REINTERVIEW AT U1  
**Could I take your email address please? (ADD IF NOT U1c/1: This is so we can give you notice of when the survey takes place next year)**

ENTER EMAIL ADDRESS TWICE IF DO NOT MATCH, RE-ENTER

No email 96  
Refused 98

U2) ASK TOP-UPS, IF INTERVIEWED DIFFERENT RESPONDENT FROM 2017/2018/2019/2020/2021/2022 (INTRO 2), OR IF DID NOT AGREE TO LINKAGE IN 2022  
**Would it be possible for (ENGLAND) ...the Department for Business and Trade**

(SCOTLAND) ...the **Scottish Government**

(NORTHERN IRELAND) ...Invest NI

(WALES) ... the **Welsh Government**

**to link your responses to other information that you have provided previously to the Government? By this data linkage, we can reduce the burden of our surveys on your [ANSWER AT A-2] and can improve the evidence that we use.**

ADD IF NECESSARY

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

Yes	1
No	2

On behalf of...

(ENGLAND) ... the **Department for Business and Trade...**

(SCOTLAND) ...the **Scottish Government**

(NORTHERN IRELAND) ...Invest NI

(WALES) ... the **Welsh Government**

**...thank you very much for your time. If you have any queries you can contact Emma Osborne at BMG Research on 0121 333 6006**

U5) INTERVIEWER TO RECORD WHETHER THE RESPONDENT IS A MAN OR A WOMAN  
 .....

Man	1
Woman	2