



Department for
Business & Trade

DBT National Survey of Registered Businesses 2024

Technical Report – Wave 9 2024

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1. Methodology note

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

1.1 Aims

The NSRB functions to support DBT's objectives. It is a strategic survey for the department, used by policy and strategy stakeholders across government to monitor businesses' exporting behaviours, plans, capabilities and attitudes towards exporting. It is also used as an evaluation tool for measuring the performance of DBT's communications campaigns. In earlier waves this primarily related to the 'Exporting is GREAT' campaign, while since wave 7 the focus has been the 'Made in the UK, Sold to the World' campaign, which was launched at the end of 2021.

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

- measure the size of the opportunity and challenge for DBT in terms of the proportion and number of companies at different stages of the exporting journey
- ascertain business attitudes to trade and exporting
- give information on barriers to exporting and how they might be addressed
- identify the level of business interest in, and engagement with, exporting support and advice
- highlight skills, resource, and knowledge gaps among businesses
- identify the barriers preventing or hindering businesses from exporting
- understand the perceived impact of Free Trade Agreements on businesses
- investigate businesses' perceptions and knowledge of Free Trade Agreements
- investigate businesses' experience of supply chain issues and resolution

Historically, the NSRB was used to evaluate the 'Exporting is GREAT' campaign, but the campaign paused in early 2020 and has since been replaced with the 'Made in the UK, Sold to the World' campaign. From July 2020 and into early 2021 there was significant government campaign activity aimed at making businesses aware of when the EU Exit transition period was ending and the need to prepare for the new rules. Over this period, campaigns relating to exporting were minimal, to allow for focus on the EU transition messaging. Therefore, most campaign related questions were removed from the wave 6 (2021) survey.

With the launch of the 'Made in the UK, Sold to the World' campaign in the final quarter of 2021, and promotional activity for the 'UK Export Academy' and 'Export Support Service' which ran alongside this, questions designed to assess the impact of the campaign were re-instated in the wave 7 (2022) survey. These have been retained in subsequent waves as the campaign has continued, albeit with changes to the support elements, namely the removal of the 'Export Support Service' materials in wave 8 and the addition of 'great.gov help and support services' materials in wave 9. This is in addition to further questions around general awareness of communications activity. These questions, including those specific to the new campaign, aimed to:

- capture awareness of information and advertising about exporting
- measure which sources of exporting publicity businesses have encountered
- measure recognition of DBT's 'Made in the UK, Sold to the World', 'UK Export Academy' and 'great.gov help and support services' campaigns

- evaluate response to and impact of the new DBT campaign materials

1.2 Research phasing

From wave 5 onwards, fieldwork for the NSRB has been conducted on a quarterly basis. This approach allowed the questionnaire design to adapt throughout the year as needed, based on changing priorities and political and current affairs. The timings of the 9 waves of interviews to date were as follows.

- wave 1: 20 October 2015 to 6 November 2015
- wave 2: 1 April 2016 to 4 May 2016
- wave 3: 26 July 2017 to 7 September 2017
- wave 4: 23 October 2018 to 4 January 2019
- wave 5 quarter 1: 3 February 2020 to 20 March 2020
- wave 5 quarter 2: 5 June to 10 July 2020
- wave 5 quarter 3/ quarter 4: 5 November 2020 to 14 December 2020
- wave 6 quarter 1: 1 February 2021 to 11 March 2021
- wave 6 quarter 2: 10 May 2021 to 14 June 2021
- wave 6 quarter 3: 9 August 2021 to 17 September 2021
- wave 6 quarter 4: 1 November 2021 to 15 December 2021
- wave 7 quarter 1: 21 February 2022 to 7 April 2022
- wave 7 quarter 2: 2 May 2022 to 16 June 2022
- wave 7 quarter 3/ quarter 4: 20 September 2022 to 13 December 2022
- wave 8 quarter 1: 27 February 2023 to 31 March 2023
- wave 8 quarter 2: 19 April 2023 to 30 May 2023
- wave 8 quarter 3/ quarter 4: 23 August 2023 to 23 November 2023
- wave 9 quarter 1: 8 March 2024 to 7 May 2024
- wave 9 quarter 2: 10 July 2024 to 28 August 2024¹
- wave 9 quarter 3/ quarter 4: 26 September 2024 to 9 January 2025

In relation to DBT's communication campaigns, it is useful to understand campaign measures in line with the context below. When campaign materials have been included within the survey (wave 2 to wave 5 quarter 1 and wave 7 onwards), respondents have been directed to a website which has allowed them to view the materials during the telephone interview.

- wave 1 was timed such that interviewing was completed before the first burst of activity in the 'Exporting is GREAT' campaign began
- wave 2 was timed such that interviewing began immediately after the initial bursts of the 'Exporting is GREAT' campaign activity had been completed
- wave 3 was timed such that interviewing was completed prior to the recommencement of activities in quarter 3 2017
- wave 4 was timed such that it followed bursts of campaign activities which ran in quarter 1 and quarter 3/ quarter 4 2018
- wave 5 quarter 1 saw the pausing of exporting campaign activity

¹ Wave 9 quarter 2 fieldwork was delayed due to the General Election which took place on 4 July 2024. This had a knock-on effect, with the start of the following quarter also delayed and, combined with the introduction of a new fieldwork supplier, meant that wave 9 ran into the start of 2025.

- in wave 6 quarter 4 DBT launched new campaign activity to direct businesses to export support services and export advice/webinars, although this was not evaluated in full until wave 7
- in wave 7, the new 'Made in the UK, Sold to the World' campaign, including supporting materials for 'UK Export Academy' and 'Export Support Service' campaigns, was evaluated in full, with diagnostic question covering all elements of the campaign
- in wave 8, the focus was primarily on the main 'Made in the UK, Sold to the World' campaign. From quarter² 2 onwards, 'UK Export Academy' adverts were shown after the diagnostic questions, so that the diagnostics focussed solely on 'Made in the UK, Sold to the World'. 'Export Support Service' campaign materials were not shown at all in wave 8
- in wave 9, the focus again was on the 'Made in the UK, Sold to the World' campaign. Throughout wave 9, 'UK Export Academy' and 'great.gov help and support services' adverts were shown after the diagnostic questions, so that the diagnostics focussed solely on 'Made in the UK, Sold to the World'

1.3 Sampling

1.3.1 Sample scope

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

All private sector businesses accessible through the IDBR were in scope for the survey. The IDBR covers approximately 2.7 million businesses in all sectors of the UK economy.³ The IDBR's coverage is of a high quality, allowing for highly representative samples to be drawn. It is drawn from 2 main sources: the Value Added Tax (VAT) system from HMRC (Customs) and Pay As You Earn (PAYE) from HMRC (Revenue). Additional input comes from Companies House, Dun and Bradstreet and ONS business surveys. As such, the main omissions from the IDBR are very small businesses operating without VAT or PAYE schemes and some non-profit organisations. This omission of very small businesses occurs as businesses are not required to register for VAT unless they have a VAT taxable turnover of more than £85,000. However, some businesses with turnovers below this threshold voluntarily choose to register for VAT.

To create the sampling frame, the data set was filtered to only include organisations with a legal status defined as 'Company', 'Sole Proprietor' or 'Partnership'. The sample frame therefore excludes non-commercial organisations defined as 'Public Corporation', 'Central Government', 'Local Authority' and 'Non-profit body or Associations'. It was also specified that businesses with a turnover of less than £500,000 must also be VAT registered.

Businesses with £500,000+ turnover were oversampled relative to their true proportion in the underlying population, reflecting DBT's focus on High Export Potential (HEP) businesses. This allowed for more robust sub-group analysis when examining the set of businesses with £500,000+ turnover, which is the primary focus of the accompanying analytical report. However, this sampling approach has limited the analysis of the total sample of all businesses. The weighting scheme required to compensate for the smaller proportion of lower turnover businesses results in a lower effective base size and larger margins of error around the all-business estimates. In line with increased demand for insight into the issues affecting businesses in the devolved nations of Scotland, Wales and Northern Ireland, the latter two nations were also oversampled relative to their true proportions in the population of businesses. This allowed for more robust comparisons between the nations of the United Kingdom.

² In the rest of this report, 'quarter' is sometimes abbreviated to 'Q'

³ <http://www.ons.gov.uk/aboutus/whatwedo/paidservices/interdepartmentalbusinessregisteridbr>

As the IDBR records do not always include telephone contact details, a quarterly look-up process was conducted prior to fieldwork to increase coverage. This process involved cross referencing the address details of businesses for whom contact numbers were not available against business databases. All records without a valid original telephone were sent through the look up process.

Figure 1.1 outlines the return of the 2-stage lookup process before validation. The results were then validated before use by checking the length of the number returned and for duplicates. Outcomes from this process are shown in Figure 1.2. 53% of the total sample had usable telephone numbers after the lookup and validation process.

Figure 1.1: Lookup results before validation

Category of sample	Number of records	Received/returned with usable number	Percentage with usable number
Original received	181,158	30,560	17%
Sent for Lookup	150,598	91,181	61%

Figure 1.2: Lookup results after validation

Category of sample	Number of records	Received/returned with usable number	Percentage with usable number
Original received	181,158	29,018	16%
Sent for Lookup	150,598	84,624	56%
Overall	181,158	95,868	53%

1.3.2 Sample stratification

The sample was assigned to quarters using a stratification of Turnover, Employee Band and Random Number. Quotas were applied to ensure that the required number of interviews with businesses of different sizes was achieved (see Section 1.3.3). However, underlying these quotas, a disproportionate stratified sampling approach was used when the sample was drawn from the IDBR. Variables used in sample stratification are shown below in Figure 1.3.

Figure 1.3: Sample stratification variables

Variables used in the sample stratification	
Type/Size of Business	<£500,000 turnover with 0 employees
Type/Size of Business	<£500,000 turnover with 1 to 2 employees
Type/Size of Business	<£500,000 turnover with 3 to 4 employees
Type/Size of Business	<£500,000 turnover with 5 to 9 employees
Type/Size of Business	<£500,000 turnover with 10 or more employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 0 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 1 to 4 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 5 to 9 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 10 to 19 employees

Type/Size of Business	£500,000 to £24,999,999 turnover with 20 to 49 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 50 to 99 employees
Type/Size of Business	£500,000 to £24,999,999 turnover with 100 to 249 employees
Type/Size of Business	£25m to £499,999,999 turnover with 0 employees
Type/Size of Business	£25m to £499,999,999 turnover with 1 to 19 employees
Type/Size of Business	£25m to £499,999,999 turnover with 20 to 49 employees
Type/Size of Business	£25m to £499,999,999 turnover with 50 to 249 employees
Type/Size of Business	£500m or higher turnover OR 250 or more employees
Region	England – North (North East, North West, Yorkshire & Humber)
Region	England – Midlands (East Midlands, West Midlands, East of England)
Region	England – South (South East, South West, London)
Region	Scotland
Region	Wales
Region	Northern Ireland

1.3.3 Quotas

The overall target sample size in waves 1 and 2 was c.1,400-1,500 interviews. From wave 3 this was increased to 3,000 interviews, which has allowed for more robust analysis. Since wave 5, when a quarterly approach was first used, interviews have been divided equally across the 4 quarters of the year, with c.750 interviews per quarter. In waves 5, 7, 8 and 9, the fieldwork for Q3 and Q4 was rolled together, largely for reasons of timing, with a target of 1,500 interviews across these 2 quarters combined.

Quotas were applied at wave 9 to ensure that the sample profile matched the target in terms of company size and ensured continuity with waves 1 to 8. The quotas were chosen to ensure that a robust sample of £500,000+ businesses was achieved. Figure 1.4 shows how the achieved number of interviews in each group varied from the target, and Figure 1.5 shows this difference by quarter. There was minimal difference between the quota target and interviews achieved between the company type/size and the region. wave 9 placed quotas on interviews in Scotland, Wales and Northern Ireland to ensure a minimum of 200 interviews in each⁴. This approach has been in place since wave 4 to allow for reporting at a nation level.

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

⁴ In wave 9 the number of interviews achieved in Wales and Northern Ireland fell slightly short of the targets set.

Figure 1.4: Wave 9 quota targets compared to achieved interviews

Company type/size	Quota target	Interviews achieved
£500,000+ SMEs (Have employees and with a turnover £500,000 up to £25m)	1,716	1,769
MSBs and Large businesses (Have employees and a turnover of £25m or higher)	452	410
Others within IDBR universe (No employees OR those with a turnover below £500,000)	832	790
Region	Quota target	Interviews achieved
England	2,400	2,393
Scotland	200	203
Wales	200	199
Northern Ireland	200	174

Figure 1.5: Wave 9 quota targets compared to achieved interviews by quarter

Company type/size	Quarterly quota target	Quarterly interviews achieved
£500,000+ SMEs (Have employees and with a turnover £500,000 up to £25m)	Q1: 429 Q2: 429 Q3/Q4: 858	Q1: 421 Q2: 438 Q3/Q4: 910
MSBs and Large businesses (Have employees and a turnover of £25m or higher)	Q1: 113 Q2: 113 Q3/Q4: 226	Q1: 110 Q2: 116 Q3/Q4: 184
Others within IDBR universe (No employees OR those with a turnover below £500,000)	Q1: 208 Q2: 208 Q3/Q4: 416	Q1: 206 Q2: 211 Q3/Q4: 373

Region	Quarterly quota target	Quarterly interviews achieved
England	Q1: 600 Q2: 600 Q3/Q4: 1,200	Q1: 592 Q2: 608 Q3/Q4: 1,193
Scotland	Q1: 50 Q2: 50 Q3/Q4: 100	Q1: 47 Q2: 55 Q3/Q4: 101
Wales	Q1: 50 Q2: 50 Q3/Q4: 100	Q1: 49 Q2: 51 Q3/Q4: 99
Northern Ireland	Q1: 50 Q2: 50 Q3/Q4: 100	Q1: 49 Q2: 51 Q3/Q4: 74

1.4 Questionnaire design

The quarterly approach enabled the questionnaire design to be revisited every quarter to accommodate new DBT priorities, though only a minimal number of essential changes were made in the aim of maintaining consistency throughout the year. The core design of the questionnaire continued to be drawn from earlier waves of the NSRB to ensure comparability between the waves.

1.4.1 Segmentation design

In wave 9, as in all previous waves, businesses are assigned to 1 of 4 segments based on their exporting behaviours and potential. The segments along with the survey questions that inform them are:

- **Sustain** (those who have exported within the last 12 months, Q15Ai, Q15Bi, Q17Ai, Q17Bi)
- **Reassure** (those who have exported, but not within the last 12 months, Q15Ai, Q15Bi, Q17Ai, Q17Bi)
- **Promote** (those who have never exported, but their product is suitable / could be developed for export, Q19A)
- **Challenge** (those who have never exported and their product is unsuitable for export, Q19A)

At wave 5, some amendments were made to the questions used to define these segments. The aim was to improve the accuracy of the questionnaire, and to reduce the number of questions and cognitive burden on participants. The exercise also substantially reduced the numbers of businesses unallocated to a segment whilst keeping proportion in each segment the same. More detail about the amendments to the segmentation design at wave 5 can be found in the [wave 5 technical report](#).

1.4.2 Average interview length

Reinstating the campaign module into the questionnaire at the start of wave 7, in addition to other new questions, led to the average interview length in Q1 and Q2 of wave 7 being 28 minutes. This caused significant problems with response rates, with businesses not prepared to spend this

amount of time answering questions. A major review of questions therefore took place prior to wave 7 Q3/Q4 and the interview length was reduced substantially, to around 20 minutes. The average interview length remained at or slightly over 20 minutes throughout wave 8 and wave 9.

Across the quarters, the slight fluctuation in interview length may be explained by the number of amendments to questions at each quarter. The detailed changes can be found in Section 2.12. The average length at each wave was as follows:

- wave 1 (14 minutes)
- wave 2 (18 minutes)
- wave 3 (21 minutes)
- wave 4 (18 minutes)
- wave 5 Q1 (23 minutes)
- wave 5 Q2 (23 minutes)
- wave 5 Q3/Q4 (21 minutes)
- wave 6 Q1 (24 minutes)
- wave 6 Q2 (23 minutes)
- wave 6 Q3 (24 minutes)
- wave 6 Q4 (23 minutes)
- wave 7 Q1 (28 minutes)
- wave 7 Q2 (28 minutes)
- wave 7 Q3/Q4 (20 minutes)
- wave 8 Q1 (21 minutes)
- wave 8 Q2 (20 minutes)
- wave 8 Q3/Q4 (22 minutes)
- wave 9 Q1 (23 minutes)
- wave 9 Q2 (23 minutes)
- wave 9 Q3/Q4 (21 minutes)

A full copy of the wave 9 questionnaire is included in Section 2.11. Questionnaires from waves 1 to 8 can be found in the earlier published technical appendices.⁵

⁵ Wave 1 and 2 questionnaires in technical appendix can be found at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/625539/FINAL_DIT_survey_of_registered_business_report_technical_annex_05_07_17a.pdf

Wave 3 questionnaire in technical appendix can be found at:

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

Wave 4 questionnaire in technical appendix can be found at:

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

Wave 5 questionnaire in technical appendix can be found at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/994096/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020-technical-report-wave-5.pdf

1.5 Data collection

Interviews were conducted using a Computer Assisted Telephone Interviewing (CATI) method. As such, the questionnaire was programmed in specialist interviewing software⁶, ensuring that question filtering was applied accurately during the interview.

In Q1 and Q2 of wave 9, the survey was administered by Verian's team of specialist interviewers. At the start of Q3/Q4, interviewing moved to Verian's new fieldwork supplier, GDCC. Before each quarter of fieldwork began, interviewers received a briefing from the research team to ensure they understood the policy background of the study, and were advised on how to deal with any queries which respondents were likely to raise during the interview.

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

Interviews were conducted with business owners, proprietors, MDs and other senior decision makers who were best qualified to talk about their company's behaviours and attitudes. Staff working in HR or facilities roles were excluded from the survey on the basis that they were less likely to be able to answer specific questions on the exporting behaviours and plans of the business.

1.6 Fieldwork outcomes

The total sample achieved at each wave was as follows:

- wave 1 = 1,405 interviews
- wave 2 = 1,418 interviews
- wave 3 = 2,991 interviews
- wave 4 = 3,000 interviews
- wave 5 = 3,001 interviews
- wave 6 = 3,002 interviews
- wave 7 = 3,001 interviews
- wave 8 = 3,004 interviews
- wave 9 = 2,969 interviews

Wave 6 questionnaire in technical appendix can be found at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1098887/dit-national-survey-of-registered-businesses-technical-report-wave-6.pdf

Wave 7 questionnaire in technical appendix can be found at:

<https://assets.publishing.service.gov.uk/media/64d345a25cac650014c2dc77/dbt-national-survey-of-uk-registered-businesses-2022-wave-7-technical-report.pdf>

Wave 8 questionnaire in technical appendix can be found at:

<https://assets.publishing.service.gov.uk/media/66cef3b3704a0794913a899a/dbt-national-survey-of-uk-registered-businesses-2023-wave-8-technical-report.pdf>

⁶ NIPO was used in waves 1-8. At the start of wave 9 the survey was moved to Forsta.

The total sample achieved at each quarter of wave 9 was as follows:

- wave 9 Q1 = 737 interviews⁷
- wave 9 Q2 = 765 interviews
- wave 9 Q3/Q4 = 1,467 interviews⁸

The fieldwork outcomes in each wave are summarised in Figures 1.8 and 1.9. Due to the change in interviewing software at the start of wave 9 some of the outcome codes are not directly comparable. In particular, there are no soft refusal codes in the Forsta software.

In wave 6, the total issued sample was significantly larger than in previous waves. There were difficulties in contacting sufficient businesses at wave 5 (2020), due to the large number of businesses working from home at the time, therefore additional sample was issued at wave 6 to ensure quotas were met.

In the first quarter of wave 7, the issued sample was reduced slightly relative to the latter quarters of wave 6, as more people were returning to office working, though it was still above that issued at wave 5. However, with difficulties in achieving quotas caused by the longer questionnaire in wave 7 Q1, additional sample was made available for the remainder of wave 7, which came from unused wave 6 records.

In waves 8 and 9, a slightly larger amount of sample was issued overall compared with wave 7, to mitigate the same challenges as were experienced in wave 7 Q1 in achieving quotas, to ensure that sufficient sample was available when considering estimated response and tele-matching success rates.

⁷ A survey routing error in wave 9 Q1 meant that a number of interviews needed to be discarded so as not to bias results to certain questions which had been skipped by mistake. Although some of the affected respondents were successfully recontacted and asked the questions they had missed, those who could not be contacted or who refused or were unable to take part in the short recontact survey were removed from the data set. The Q1 shortfall was made up in Q2 and the combined total for Q1 and Q2 was 1,502 interviews.

⁸ A combination of delays to the start of fieldwork caused by the General Election and the introduction of a new fieldwork supplier meant that wave 9 Q3/Q4 ran into the start of 2025 and then closed with a slight shortfall in interviews.

Figure 1.8: Fieldwork outcomes

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9
Total issued sample All available sample with usable telephone number	22,614 100%	23,383 100%	44,094 100%	43,347 100%	44,537 100%	91,321 100%	96,634 100%	111,463 100%	116,668 100%
Ineligible sample Bad sample/deadwood (telephone number not active / company not known at number / caller ID block / nuisance / duplicate number / public sector / business permanently closed)	2,206 (10%)	2,197 (9%)	6,519 (15%)	8,064 (19%)	5,457 (12%)	11,545 (13%)	15,327 (16%)	16,914 (15%)	15,569 (13%)
Total in-scope sample	20,408 100%	21,186 100%	37,575 100%	35,283 100%	39,080 100%	79,776 100%	81,307 100%	94,549 100%	101,099 100%
Completed interviews	1,405 (7%)	1,418 (7%)	2,991 (8%)	3,000 (9%)	3,001 (8%)	3,002 (4%)	3,001 (4%)	3,004 (3%)	2,969 (3%)
Hard refusal to participate (refused altogether / refused screening information / broke off during interview)	1,266 (6%)	1,320 (6%)	4,795 (13%)	3,796 (11%)	3,858 (10%)	4,185 (5%)	10,969 (13%)	7,746 (8%)	14,205 (14%)
Soft refusal to participate (repeated deferrals when contacted / claimed unavailable during fieldwork / claimed unable to participate) ⁹	636 (3%)	572 (3%)	2462 (7%)	7,569 (21%)	3,071 (8%)	3,542 (4%)	6,660 (8%)	3,171 (3%)	N/A
Interview abandoned (telephone line issues / IT issues)	18 (0%)	13 (0%)	128 (0%)	80 (0%)	69 (0%)	9 (0%)	12 (0%)	21 (0%)	704 (1%)
Unresolved outcomes (record not contacted / quota full / engaged tones / answer machines / no answer / respondent requested call back)	17,083 (84%)	17,863 (84%)	27,199 (72%)	20,838 (59%)	29,081 (74%)	69,018 (87%)	60,666 (75%)	80,607 (85%)	83,221 (82%)

⁹ Soft refusal codes are not used within the Forsta software, so these are unavailable from wave 9. Many of those previously coded as a soft refusal will now appear under hard refusals.

Figure 1.9: Fieldwork outcomes for wave 9 Quarters

	Q1	Q2	Q3/Q4
Total issued sample All available sample with usable telephone number	30,358 100%	28,461 100%	57,849 100%
Ineligible sample Bad sample/deadwood (telephone number not active / company not known at number / caller ID block / nuisance / duplicate number / public sector / business permanently closed)	2,409 (8%)	2,969 (10%)	10,191 (18%)
Total in-scope sample	27,949 100%	25,492 100%	47,658 100%
Completed interviews	737 (3%)	765 (3%)	1,467 (3%)
Hard refusal to participate (refused altogether / refused screening information / broke off during interview)	3,386 (12%)	2,317 (9%)	8,502 (18%)
Interview abandoned (telephone line issues / IT issues)	90 (0%)	107 (0%)	507 (1%)
Unresolved outcomes (engaged tones / answer machines / no answer / respondent requested call back / sample not contacted / quota full)	23,736 (85%)	22,303 (87%)	37,182 (78%)

1.7 Weighted and unweighted sample profiles

Weights were applied to ensure the survey sample matched the profile of the population of interest (in this case UK registered businesses). In this case, the weights correct for the fact that some types of businesses may be less willing to participate in research than others. They also correct for any deliberate skews in the sample. As has been done in all previous waves of the survey, this wave of the NSRB purposely over-sampled businesses with a turnover of £500,000+ and businesses in Wales and Northern Ireland, and the weights therefore pull these back to representative proportions in the total business population data set.

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

1.7.1 Wave 9 weights

Quarterly weights

At wave 9, each quarter of the survey has been weighted separately, with Q3/Q4 being considered as a single 'quarter' for the purposes of weighting. This was consistent with the approach taken at waves 5 to 8. The weighting approach for wave 1 to wave 8 can be found in the report's appendix.

The benchmark population statistics used as targets in the weighting came from IDBR (the database used to draw the sample). Each quarter of wave 9 has been weighted to match the same population targets.

As with waves 3 to 8, the weighting was based on variables from the IDBR database (appended to the main survey data set) as opposed to the equivalent measures collected in the survey itself (as the weighting targets were themselves based on IDBR data).

The total business population weights were applied to turnover interlocked with number of employees, region and sector (based on Standard Industry Classifications).

Figure 1.10: Wave 9 unweighted versus weighted sample profile among the Total Business sample¹⁰

	Q1 Unweighted profile	Q2 Unweighted profile	Q3/Q4 Unweighted profile	Weighted profile for each quarter
Company size				
Less than £500,000 turnover with 0 to 2 employees	16%	18%	17%	58%
Less than £500,000 turnover with 3 to 9 employees	11%	8%	8%	14%
Less than £500,000 turnover with 10+ employees	1%	1%	1%	2%
£500,000 to £499,999,999 turnover with 0 to 19 employees	47%	48%	50%	21%
£500,000 to £499,999,999 turnover with 20 to 49 employees	13%	13%	14%	4%
£500,000 to £499,999,999 turnover with 50 to 249 employees	8%	9%	8%	2%
£500,000 to £499,999,999 turnover with 250+ employees OR £500m+ turnover	4%	3%	3%	<0.5%
Region				
North	15%	17%	17%	19%
Midlands	26%	25%	25%	25%
South	40%	38%	39%	43%
Scotland	6%	7%	7%	7%
Wales	7%	7%	7%	4%
Northern Ireland	7%	7%	5%	3%
Sector (based on SICs)				
Manufacturing	18%	17%	16%	12%
Infrastructure	17%	14%	15%	21%
Distribution	28%	31%	29%	24%
Finance, Professional, Technical and Creative	19%	22%	20%	27%
Other	18%	17%	19%	17%

¹⁰ Due to rounding, totals may not sum to 100%

The £500,000+ sample weights were applied to the following variables¹¹:

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

Figure 1.11: Wave 9 unweighted versus weighted £500,000+ sample profile

	Q1 Unweighted profile	Q2 Unweighted profile	Q3/Q4 Unweighted profile	Weighted profile for each quarter
Region interlocked with number of employees				
North with 20 to 249 employees	5%	4%	5%	5%
North with <20 or 250+ employees	10%	12%	13%	15%
Midlands with 20 to 249 employees	8%	11%	8%	5%
Midlands with <20 or 250+ employees	18%	14%	17%	20%
South with 20 to 49 employees	7%	6%	7%	6%
South with 50 to 249 employees	5%	5%	4%	3%
South with <20 or 250+ employees	27%	24%	29%	34%
Scotland with 20 to 249 employees	1%	2%	3%	1%
Scotland with <20 or 250+ employees	6%	6%	4%	5%
Wales with 20 to 249 employees	2%	1%	2%	1%
Wales with <20 or 250+ employees	5%	7%	5%	3%
Northern Ireland with 20 to 249 employees	2%	1%	2%	1%
Northern Ireland with <20 or 250+ employees	5%	6%	3%	2%
Sector interlocked with turnover and number of employees				
Manufacturing with 20 to 249 employees	7%	8%	7%	3%
Manufacturing with <20 or 250+ employees	12%	12%	11%	9%
Infrastructure with 20 to 249 employees	6%	4%	5%	3%
Infrastructure with <20 or 250+ employees	12%	10%	11%	17%
Distribution with 20 to 249 employees	8%	8%	8%	6%
Distribution with <20 or 250+ employees	22%	23%	22%	23%

¹¹ Due to low cell accounts across some of the interlocking cells it is sometimes necessary to condense some of the target cells and so these can vary slightly from wave to wave. For example, in wave 8 region was not interlocked with number of employees at all.

Financial services with 20 to 249 employees	5%	4%	3%	4%
Financial services with <20 or 250+ employees	10%	14%	14%	15%
Other with 20 to 249 employees	5%	7%	7%	5%
Other with <20 or 250+ employees	13%	11%	13%	15%
Turnover interlocked with number of employees				
£500,000 to £24,999,999 turnover with <4 employees	17%	16%	18%	33%
£500,000 to £24,999,999 turnover with 5 to 9 employees	23%	25%	23%	24%
£500,000 to £24,999,999 turnover with 10 to 19 employees	20%	19%	22%	21%
£500,000 to £24,999,999 turnover with 20 to 249 employees	20%	19%	20%	19%
£25m+ with 20 to 49 employees	4%	3%	3%	<0.5%
£25m+ with 50 to 249 employees	7%	8%	7%	1%
£500,000 to £24,999,999 turnover with 250+ employees OR £25m+ with <19 or 250+ employees	10%	9%	7%	2%

Annual weights

Weights have also been generated to allow for analysis of the whole of wave 9 (merging the quarterly data sets). As for the quarterly data, there are separate weights to analyse (i) the total registered business population and (ii) registered businesses with a turnover of £500,000+. These 2 annual weights have been derived from the quarterly weights and each quarter contributes equally to the annual survey estimates. The combined Q3/Q4 contributes with a weight of 2 quarters.

1.8 Effective base sizes and margins of error

Survey data are subject to random error. In most cases the responses obtained from a survey sample will not perfectly reflect the wider population that the sample represents. For example, bias may be introduced depending on the unwillingness of certain respondents to participate in the survey.

Applying weights to survey data, while tending to make the quoted figures more representative of the population of interest, also has the effect of reducing the statistical reliability of the data (if the data were generated from a random probability sample, it would increase the size of confidence intervals). We have calculated 'effective' base sizes¹² to quantify this effect – the ratio between the unweighted base and the effective base gives an indication of the extent to which data have become less precise due to weighting. As discussed previously, quotas are used to select businesses at the interviewing stage (targets are set for different subsets of the population), meaning the probabilities of selection are not equal or known. Confidence intervals rely on statistical theory and a known probability of selection and therefore do not apply to this data in the

¹² The effective base size is calculated as:

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

traditional sense. Similarly, formal significance tests cannot be used with quota sampling for similar reasons. Despite this, we have still turned to confidence intervals to give an idea of the uncertainty around the results and significance testing is used throughout the main report to guide the commentary.¹³

Confidence intervals and significance testing has been applied in the way that it would for data generated from a random probability sample. The effective base, which considers the reduction in statistical reliability associated with weighting the data, is used in the significance testing as opposed to the unweighted or weighted base. Significance tests considered in the main report are two-tailed, that is, they test for a difference between two results at the 95% confidence level, rather than for an increase or a decrease. It must be made clear that since the data has been generated from a quota sample, none of the findings in this report are statistically significant in the conventional sense; that is, being able to assume to within a stated degree of probability that they also apply to the wider population. Where 'significance' is referenced, this is only intended as a guide as to which findings are notably different.

As shown in Figure 1.12 and 1.13, the effective base size for the 'all businesses' group is lower than that for the SME/MSB group. This is because more extensive weighting is applied to the 'all businesses' data. The total sample is designed to include a relatively limited number of small businesses with an annual turnover of less than £500,000. However, this group accounts for a large proportion of all UK businesses. Therefore, any such businesses included in the NSRB sample are given strong upweights in the 'all businesses' data set, reducing the effective base size significantly.

The £500,000+ data sets¹⁴ exclude these smaller businesses and the variance of the weights applied is smaller, hence the comparatively larger effective base sizes. The additional complexity of the weights employed at waves 3 to 9 accounts for the fact that the effective base size is proportionately lower than the unweighted base in these later waves.

Figure 1.12: Unweighted and effective base sizes by wave

Base definition	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9
All businesses – unweighted base	1,405	1,418	2,991	3,000	3,001	3,002	3,001	3,004	2,969
<i>All businesses – effective base</i>	<i>347</i>	<i>405</i>	<i>550</i>	<i>635</i>	<i>529</i>	<i>674</i>	<i>855</i>	<i>1,199</i>	<i>1,241</i>
£500,000+ turnover – unweighted base	1,160	1,139	2,535	2,448	2,557	2,485	2,405	2,181	2,182
<i>£500,000+ turnover – effective base</i>	<i>922</i>	<i>909</i>	<i>1,617</i>	<i>1,319</i>	<i>1,457</i>	<i>1,080</i>	<i>1,422</i>	<i>1,471</i>	<i>1,487</i>

¹³ Commentary throughout the report focuses on data that, in an equivalent random probability sample, would be statistically significant at a 95% confidence level. In basic terms this means that if the survey were to be conducted 100 times, a finding of the same nature (for example sub-group A is more likely to respond in a certain way than sub-group B) would be found on at least 95 occasions.

¹⁴ Strictly speaking the definition was £500,000+ SME/MSBs at waves 1 and 2 rather than all £500,000+ businesses. There is relatively little difference in these definitions and for the purposes of the survey reports they have been deemed to be acceptable proxies for one another

Figure 1.13: Unweighted and effective base sizes for wave 9 Quarters

Base definition	Q1	Q2	Q3/Q4
All businesses – unweighted base	737	765	1,467
<i>All businesses – effective base</i>	303	330	609
£500,000+ turnover – unweighted base	533	555	1,094
<i>£500,000+ turnover – effective base</i>	347	334	819

The indicative margins of error associated with the effective base sizes outlined in Figures 1.12-1.13 are summarised in Figures 1.14-1.15. As discussed above, the margins of error (also referred to as confidence intervals) around a quota sample should be viewed as an indicative approximation.

Figure 1.14: Indicative maximum 95% margins of error for each wave

Base definition	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9
All businesses – effective base	347	405	550	635	529	674	855	1,199	1,241
<i>All businesses – margin of error</i>	±5.3 %pts	±4.9 %pts	±4.2 %pts	±3.9 %pts	±4.3 %pts	±3.8 %pts	±3.4 %pts	±2.8 %pts	±2.8 %pts
£500,000+ turnover – effective base	922	909	1,617	1,319	1,457	1,080	1,422	1,471	1,487
<i>£500,000+ turnover – margin of error</i>	±3.2 %pts	±3.3 %pts	±2.4 %pts	±2.7 %pts	±2.6 %pts	±3.0 %pts	±2.6 %pts	±2.6 %pts	±2.5 %pts

Figure 1.15: Indicative maximum 95% margins of error for each Quarter of wave 9

Base definition	Q1	Q2	Q3/Q4
All businesses – effective base	303	330	609
<i>All businesses – margin of error</i>	±5.7%pts	±5.4%pts	±4.0%pts
£500,000+ turnover – effective base	347	334	819
<i>£500,000+ turnover – margin of error</i>	±5.3%pts	±5.4%pts	±3.4%pts

1.9 Data processing

Aside from the coding of responses to open-ended questions, no data entry phase was required for this CATI survey. The programmed script ensured that all question routing was performed automatically, and no post-editing of the data was required.

Responses from fully open-ended questions were collated and code frames created to reflect all key themes in the responses. Responses from questions with an 'other – specify' option were analysed and, if appropriate, back-coded into one of the pre-coded categories. If the response

could not be assigned to an existing code but gained a sufficient number of mentions, a new code was created which all relevant responses were assigned to. Coding was carried out by a specialist team. All coders who worked on the study were briefed and a written set of instructions was made available. Code frames were created by the coding team in the first instance and approved by the research team.

1.10 Sub-group definitions

1.10.1 Sector

The industry sectors referred to throughout the main survey report are defined as follows. All definitions are based on UK SIC (2007) sections.¹⁵ Respondents self-classified their businesses into these sectors during the survey. Some sectors have been merged for reporting purposes so that base sizes are sufficiently large for analysis.

Figure 1.17: Sector groupings

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

¹⁵ Further details are available on the ONS website:

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

1.11 Data quality of the survey

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

The margins of error associated with the survey data can be found by referring back to Section 1.8.

In a couple of instances, estimates of the number of businesses in the wider population of UK registered businesses which fall into certain categories (as opposed to the proportion) are provided in the main report. These estimates draw upon the number of registered businesses recorded in the IDBR at the end of 2023, at the point at which the contact sample for wave 9 was generated.

1.12 Users and uses of the report

DBT publishes data from the NSRB with a view to encouraging a broad range of users to draw upon the data. Users of NSRB data may include ministers, policy makers and analysts within the department, policy makers within central government, devolved administrations and local councils, trade associations, exporting consultancy firms, non-profit organisations/charities, international statistics organisations, academia, media and the public.

The data provides insights to allow a better understanding of changing UK business behaviours and attitudes towards exporting and importing. The survey highlights some of the barriers that businesses face when trading internationally, and the support that businesses will need if they are to start doing so in greater volumes. Furthermore, it provides data to inform the ongoing design and media planning of communication campaigns.

NSRB data are published in the interests of transparency and so that the data can benefit as broad a group of stakeholders as possible.

1.13 Glossary

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

- £500,000+ businesses: UK registered businesses with a turnover of £500,000 per year or more (see also entry for registered businesses)
- ABS: The Annual Business Survey, the main structural business survey conducted by the Office for National Statistics
- (the) Challenge segment: NSRB terminology to describe businesses which have never exported and do not currently see their goods or services as suitable for export
- DBT: The Department for Business and Trade, this replaced the Department for International Trade (DIT) on 07 February 2023
- DIT: The Department for International Trade
- EiG: The Exporting is GREAT marketing campaign
- IDBR: The Inter-Departmental Business Register, this provides the main sampling frame for surveys of businesses carried out by the Office for National Statistics (ONS) and other government departments. The IDBR covers 2.7 million businesses in all sectors of the UK economy, other than very small businesses (those without employees and with turnover below the tax threshold) and some non-profit making organisations.
- MIUK: The Made in the UK, Sold to the World marketing campaign

- MSB: Mid-Sized Business. For the purposes of early waves of the NSRB these were defined as having at least 1 employee and a turnover of £25m up to £500m. From wave 3 DBT's preferred definition was updated such that we now focus on 'Medium businesses' rather than mid-sized businesses. Medium businesses are defined as having 50 to 249 employees and a turnover of £500,000+.
- (the) Promote segment: NSRB terminology to describe businesses which have never exported but which self-identify as having goods or services which could potentially be exported or developed for export
- (the) Reassure segment: NSRB terminology to describe businesses which haven't exported in the past 12 months, but which had exported previously
- Registered businesses: Business which appear on the Inter-Departmental Business Register (see also entry for IDBR)
- SME: Small and Medium sized Enterprise. For the purposes of early waves of the NSRB these were defined as having between 1 and 249 employees and a turnover of less than £25 million. From wave 3 DBT's preferred definition was updated such that we now focus on 'Small and Medium businesses' rather than SMEs. Medium businesses are defined as having 50 to 249 employees and a turnover of £500,000+. Small businesses are defined as having 10 to 49 employees and a turnover of £500,000+.
- (the) Sustain segment: NSRB terminology to describe current exporters, that is businesses which have exported goods or services in the past 12 months

1.14 Reporting methodology

As outlined in Section 1.8, all commentary in the published reports focuses on differences (between waves or between sub-groups) that would be statistically significant ($p < 0.05$) if the data had been generated from a random probability sample.

Underlying percentage figures are rounded to the nearest whole integer. Some percentages may not add up to the totals due to rounding or the exclusion of 'don't know' responses from some charts.

1.15 Revisions policy

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

1.16 Further information and feedback

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

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

2. Background Quality Report

2.1 Background to the release

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

Nine waves of data collection have been completed to date. Data from the first 2 waves were published on 5 July 2017, alongside a technical appendix and survey report.¹⁶

Data from the third wave was published on 7 June 2018. These were published alongside 2 survey reports and a technical appendix.¹⁷

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

Data from the fifth wave was published on 16 June 2021. These were published alongside a survey report and the technical details outlined here.¹⁹

Data from the sixth wave was published on 18 August 2022. These were published alongside a survey report and the technical details outlined here.²⁰

Data from the seventh wave was published on 9 August 2023. These were published alongside a survey report and the technical details outlined here.²¹

Data from the eighth wave was published on 29 August 2024. These were published alongside a survey report and the technical details outlined here.²²

Data from the ninth and most recent wave was published on 14th August 2025. These were published alongside a survey report and the technical details outlined here.²³

2.2 Data quality of data sources

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

¹⁷ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2017>

¹⁸ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2018>

¹⁹ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020>

²⁰ <https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2021>

²¹ <https://www.gov.uk/government/statistics/dbt-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2022>

²² <https://www.gov.uk/government/statistics/dbt-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2023>

²³ <https://www.gov.uk/government/statistics/dbt-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2024>

As specified by the Office for National Statistics, the quality of a statistical product can be defined as the “fitness for purpose” of that product.²⁴ More specifically, it is the fitness for purpose with regards to the European Statistical System dimensions of quality.²⁵ These quality dimensions focus on the following areas:

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

There are additional characteristics that should be considered when thinking about quality. These include output quality trade-offs, user needs and perceptions, performance cost and respondent burden, and confidentiality, transparency and security. More information on the use of these dimensions to measure statistical output quality can be found in the Government Data Quality Hub’s “Quality statistics in government” guidance.²⁶

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

2.3 Relevance

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

2.3.1 Content

The survey provides a range of behavioural and attitudinal data relating to exporting. By comparing these over time, it is possible to understand how business engagement with exporting is changing.

The NSRB has historically collected a broad range of data on the performance of the ‘Exporting is GREAT’ campaign and, more recently the ‘Made in the UK, Sold to the World’ campaign, which are not available from other data sources. As such, it is a valuable tool in terms of understanding how effectively campaign messaging has cut through to businesses and identifying ways in which campaigns could be refined in the future.

See Section 2.11 for full details of the questionnaire content.

2.3.2 Completeness

The survey is primarily designed to provide robust data on £500,000+ businesses, as these businesses are of central importance when it comes to driving growth in exports. As such, the survey’s representation of the total business population (including smaller companies with a

²⁴ <https://www.ons.gov.uk/methodology/methodologytopicsandstatisticalconcepts/qualityinofficialstatistics/qualitydefined>

²⁵ <http://ec.europa.eu/eurostat/web/ess>

²⁶ <https://gss.civilservice.gov.uk/policy-store/quality-statistics-in-government/>

turnover below £500,000+) is less robust and sub-group analysis within the total population is not therefore possible.

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

2.3.3 Geographical coverage

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

2.3.4 User needs

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

NSRB data is published with a view to encouraging a broad range of users to draw upon the data. Users of NSRB data may include ministers, policy makers and analysts within the Department for Business and Trade, policy makers within central government, devolved administrations and local councils, trade associations, exporting consultancy firms, non-profit organisations/charities, international statistics organisations, academia, media and the public.

The data provides unique measures of UK registered businesses' exporting attitudes and behaviours. It also allows users to understand how DBT campaigns, including 'Exporting is GREAT' and 'Made in the UK, Sold to the World' are performing.

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

2.4 Accuracy and reliability

Accuracy and reliability in this case is defined as how close the estimated values described in our output are to the true results. Given that we are drawing upon information provided by a sample of businesses to make inferences about the wider population, there are several elements to consider in this regard.

2.4.1 Effective sample size

As discussed further in Section 2.4.2, the sample was designed primarily to give a robust read of the £500,000+ group and it was necessary to apply relatively large weights to the 'all businesses' data. These weights reduce the effective sample size for all businesses to a level where robust sub-group analysis is not possible. As such, and unless specified otherwise, all sub-group analysis in the NSRB report is based on £500,000+ businesses. Further details of the effective sample sizes for key sub-groups can be found by referring back to Section 1.8.

2.4.2 Sampling method

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

The use of quota sampling means that this approach constitutes a less methodologically robust design than a pure random probability method. Strictly speaking, confidence intervals and formal

statistical testing cannot be applied to quota samples given that each case does not have a known probability of selection.

The quota approach was adopted with a view to achieving the necessary number of interviews with key sub-groups in a cost-effective manner. Furthermore, the timeframes associated with a rigorous random probability approach would be too great for the timely collection of policy-relevant data.

Stratified random probability sampling was employed to select the base sample. This allowed for low incidence population sub-groups of analytical interest to be oversampled. Since not all businesses in the UK can or will take part, this approach also ensures that the selected sample within each stratum reflects the wider population of UK businesses.

2.4.3 Uncertainty and bias

Recruitment for the survey was conducted with a view to avoiding bias towards exporters in the sample. During recruitment, the survey was introduced to businesses in terms of DBT's remit to support businesses in the UK and help them to grow rather than focusing explicitly on DBT's role in driving exports. It should, however, be acknowledged that historically the survey's association with DIT may have meant that exporters were more inclined to participate than non-exporters. This may be true to a lesser extent for DBT, whose name alone places an equal focus on business and trade generally.

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

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

In the absence of a counterfactual showing how respondents' views would have differed in the event that the vote to leave the EU had never taken place, it is impossible to be certain of the effect that this has had on the survey data.

Wave 5 fieldwork was conducted at the outbreak of the COVID-19 pandemic and the EU exit transition period. Q1 fieldwork was conducted as the outbreak of COVID-19 grew and the UK went into lockdown. Additionally, just prior to Q1 fieldwork beginning, the UK had entered its 1-year EU exit transition period. During Q2 fieldwork, the first local lockdown began while other restrictions began to ease in other local areas. As Q3/Q4 fieldwork took place the legislation confirming the EU exit and future trading agreements was being finalised while lockdown measures continued. Further detail about the timeline of 2020 and the fieldwork dates can be found in the wave 5 main research findings report.²⁷

On December 31 2020, the UK officially left the EU and a few days later went into its third COVID-19 national lockdown. Public health measures were gradually relaxed from March onwards, and by July, most of these measures had been relaxed. Wave 6 Q1 and Q2 fieldwork took place during this period. All measures were relaxed as Q3 fieldwork took place. As Q4 took place, the first cases of the Omicron variant of COVID-19 were identified in the UK and cases started to rise once

²⁷ See the wave 5 main research findings report here:
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/994098/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020-wave-5-report.pdf

again. Further detail about the timeline of 2021 and the fieldwork dates can be found in the main research findings report²⁸.

Wave 7 fieldwork in 2022 was the first wave of NSRB to be conducted in entirety following the ratification of the EU / UK Trade and Cooperation Agreement. Furthermore, all legal restrictions around COVID-19 were officially lifted early in Q1 fieldwork. However, the wave 7 survey year was set within the context of several new and ongoing events which affected businesses both in the UK and around the world. The most impactful of these are detailed below, and further information about the timeline of 2022 and corresponding fieldwork dates can be found in the main research findings report²⁹:

- global trade, already under strain from the effects of the COVID-19 pandemic, suffered further from shocks including high inflation, tight financial conditions, economic slowdown in China, supply chain restrictions and the effect of Russia's illegal invasion of Ukraine
- supply chain bottlenecks driven by backlogs from the COVID-19 pandemic and intermittent lockdowns in key producer economies
- policies specific to the UK, such as the UK's exit from the EU, the Autumn 'Growth Plan' (mini budget) that was introduced by the Government in September 2022 and ongoing initiatives relating to areas such as 'Levelling Up' and the 'Green Agenda'

The UK faced several economic challenges during the wave 8 2023 fieldwork period. Growth was low in 2023 with 0.1% year on year GDP growth, which was below the OBR forecast (0.6%), as high inflation in 2023 and higher interest rates subdued activity. The economy entered a technical recession at the end of 2023, which included contraction during quarter 3 when the NSRB fieldwork was active. However, the economy did perform better than many forecasts had expected. A significant predicted recession did not occur.

At the time wave 8 fieldwork ended in November 2023 inflation was above the 2% Bank of England target, at 3.9%. However, this had fallen substantially from February, when it had been 10.4%. Higher inflation was initially primarily driven by global factors, such as higher global energy prices and post-pandemic supply chain bottlenecks, but domestic factors also had a prominent impact. Domestic drivers of inflation included wage growth. The UK was not alone in seeing low growth. German GDP fell over the year, and 9 EU economies experienced a recession in 2023.

In 2024, whilst the strain of the COVID-19 pandemic had begun to subside, global trade continued to suffer from shocks including high inflation, tight financial conditions, supply chain restrictions and the continued impact of global geopolitical unrest (Russia's illegal invasion of Ukraine and conflict in the middle east). Global trade and business confidence was also impacted by the US presidential election in November 2024. Circumstances specific to the UK also continued to have an influence on businesses, such as the UK's exit from the EU, the change in government after the 2024 general election, and the new Labour government's Autumn Budget. This government also announced policies and legislation impacting businesses, including a new industrial strategy and workers' rights.

The survey has mitigated the lack of a counterfactual where possible, for example by asking respondents to directly specify whether the campaign had affected certain behaviours. However, it

²⁸ See the wave 6 main research findings report here:

<https://assets.publishing.service.gov.uk/media/62fd0f25e90e0703e0050d95/dit-national-survey-of-uk-registered-businesses-2021-wave-6-report.pdf>

²⁹ See the wave 7 main research findings report here:

<https://assets.publishing.service.gov.uk/media/64d343b05cac650014c2dc76/dbt-national-survey-of-uk-registered-businesses-2022-wave-7-report.pdf>

was not possible to obtain a reliable attribution of effect for the majority of survey metrics and it is therefore important to bear the broader background factors in mind when interpreting the findings.

2.5 Timeliness and punctuality

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

The interval between the completion of fieldwork and the publication of the report is relatively short for this type of primary research undertaking. Fieldwork ended on 9 January 2025 and the full research report was published on 14th August 2025.

All releases are published in accordance with a pre-announced release timetable. Notification of the upcoming publication was placed in the GOV.UK Research and Statistics Calendar approximately 4 weeks prior to publication, in accordance with the Code of Practice for Statistics.

2.6 Accessibility and clarity

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

Several outputs from the NSRB are published and freely available alongside this technical report on the GOV.UK website.³⁰

An analytical report for wave 9 has been published, which provides an in-depth overview of findings from the £500,000+ business population alongside a summary of findings relating the total registered business population. The report is designed such that all key findings are described in the text and are therefore accessible by users who rely on screen readers. Visual content (primarily charts) has been included to give an easily understandable overview of key data. All visual content is supplemented by Alt Text to further improve accessibility.

From wave 7, data tabulations are published in an accessible format in OpenDocument Spreadsheets, with formatting guided by Government Analysis Function conventions. Data tabulations for earlier waves are published in an Excel format, following formatting conventions applicable at the time of publication.

2.7 Coherence and comparability

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

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

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

³⁰ <https://www.gov.uk/government/statistics/dbt-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2024>

There are no issues around coherence or comparability in these cases as IDBR data are matched directly onto the survey data set using unique IDBR serial numbers. The same applies to cases where weights were applied to IDBR data (as discussed in Section 1.7.1).

It should be noted that some of the figures quoted in this report differ from those derived from the Annual Business Survey (ABS). The ABS is the main structural business survey conducted by the Office for National Statistics (ONS). Among other things, it provides statistics relating to the number and percentage of exporters in Great Britain. As such, it is a highly important source of data and remains the primary source used to inform government departments' understanding of fundamental exporting metrics.

The NSRB and ABS, while having some shared content, have different methodologies and different fundamental objectives.

There are several reasons for the differences in estimates between the ABS and the NSRB. Foremost among these are:

- the ABS specifically targets sectors which account for around two thirds of the total economy and excludes sub-categories including much of the finance and agriculture sectors. In contrast, the results from the NSRB include all sectors (with the exception of public sector and charities)³¹
- respondents to the ABS provide answers in the context of their reporting unit, whereas the NSRB collects data at an enterprise level.³² This means that ABS might record a smaller proportion of 'exporters' among its survey population (essentially because there are some companies which are made up of a mixture of units which export and units which do not)
- there are methodological differences between the 2 surveys which may also have had some impact on the data:
 - different survey modes were employed. Prior to 2023, the ABS was conducted using a Pencil and Paper (PAPI) self-completion method, then in 2023 the ABS moved to online web-survey completion³³. In contrast, the NSRB uses a Computer Assisted Telephone Interviewing (CATI) method
 - the NSRB uses quotas rather than stratified random probability sampling to ensure a sufficient representation of different types of enterprise. Although the resulting data are weighted to reflect the wider population of businesses in the IDBR, this could still have an effect
- the Northern Ireland data which feeds into the ABS is collected by the Department of Finance and Personnel (DFPN) and is run as a separate exercise to the ONS data collection for Great Britain. The NSRB is conducted as a single survey covering the UK as a whole

³¹ More specifically, the NSRB sample was selected to include enterprises with a legal status of 1 (company), 2 (sole proprietor) or 3 (partnership) in the Inter-Departmental Business Register (IDBR).

³² The enterprise is the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision making, especially for the allocation of its current resources. An enterprise carries out 1 or more activities at 1 or more locations. An enterprise may be a sole legal unit. The reporting unit holds the mailing address for the business and is the unit for which businesses report their survey data to ONS. In general, the reporting unit is the same as the enterprise. In some of the more complex cases, enterprises are subdivided into reporting units known as kind-of-activity units, or KAUs, which group together all the offices, production facilities, etc. which are responsible for the production of the same type of product or service.

³³ [Latest questions for the Annual Business Survey \(ABS\) 2023 - Office for National Statistics](#)

The ABS is based on a survey of over 60,000 reporting units while the NSRB has a sample size of circa 3,000 respondents at each wave (and circa 1,400 in waves 1 and 2). Neither survey constitutes a census of UK businesses – as such, there are margins of error around the estimates that both surveys produce.

2.7.1 Change to weighting approach at waves 3 and 4

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

The weighting approach for the data set based on businesses with an annual turnover of £500,000+ is broadly consistent over time, and cross-wave comparisons are therefore reliable.

However, the weighting matrix for the ‘all businesses’ data set applied from wave 3 onwards was significantly more detailed than that used in waves 1 and 2 with regards to sub-divisions within the micro business category (that is businesses with 0 to 9 employees). This change in approach was enabled by the larger sample size of these later waves and means that the weighted wave 3 to 9 data is more representative than that of earlier waves. However, this also means that trends may have been affected and a degree of caution is necessary when comparing figures from wave 3 onwards for the total business population against earlier waves. Further detail of the weighting scheme can be found by referring back to Section 1.7.

2.7.2 Change in £500,000+ turnover sub-group definition at wave 3

In the first NSRB report, which focused on data from waves 1 and 2, one of the key sub-groups of interest was £500,000+ SME/MSBs.³⁴

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

For wave 3 onwards, the equivalent group of interest was slightly amended and now constitutes **all** businesses with an annual turnover of £500,000+. This is a small change which means that the new definition now incorporates the very small number of businesses which have no employees and a turnover of £500,000+ (<1% of all £500,000+ businesses) and businesses with a turnover of £500m+ (<2% of all £500,000+ businesses). The inclusion of these extra companies in the definition will have had a minimal impact on trends and wave 1 and 2 data have not therefore been recalculated.

Strictly speaking, the text in reports should refer to ‘£500,000+ SME/MSBs’ when discussing the wave 1 and 2 data, and ‘£500,000+ businesses’ when discussing the wave 3 to 9 data. However, in the interests of legibility and bearing in mind the minimal difference in these definitions, a decision has been taken to refer to this sub-group as ‘£500,000+ businesses’ for all waves of survey data.

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

³⁴ The report for wave 1 and 2 is available here:

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

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

Since wave 2, DBT has adopted new company size definitions which tie up with the standard EU definition. Accordingly, reports generally no longer refer to SMEs³⁵ and MSBs and now use definitions which are driven by the number of employees in a given company, as follows:

- micro – 0 to 9 employees
- small (lower band) – 10 to 19 employees
- small (upper band) – 20 to 49 employees
- medium – 50 to 249 employees
- large – 250+ employees

2.8 Trade-offs between Output Quality Components

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

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

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

The other chief trade-off relates to effective base sizes. The primary focus of the survey is on businesses with a turnover of £500,000+ and the survey accordingly oversamples them relative to their incidence in the total population of registered businesses. This means that the effective base size of £500,000+ businesses is more robust than the effective base size for the total population of registered businesses. To mitigate this effect, the base size at from wave 3 onwards was increased and the sample structure amended, resulting in a more robust total population data set.

2.9 Performance, cost and respondent burden

Resources must not be used wastefully and desired research outcomes must be reached in a cost-effective manner. Respondent burden should be proportional to the needs of users and not excessive for respondents and this aspect of quality is defined accordingly.

The key survey metrics are not available elsewhere. While some survey content is duplicated from other surveys, this has been done deliberately as the information is needed to allow the necessary sub-group analysis. Furthermore, any duplication stems primarily from the Annual Business Survey

³⁵ SMEs may be used to refer to all businesses with fewer than 250 employees.

and an earlier evaluation of the 'GREAT Britain' campaign. Lead times for the ABS survey mean that even if data from duplicated questions were to be drawn directly from the ABS data set, it would not be contemporaneous with the NSRB data and would therefore be less useful for some purposes than the newly collected data. There have also been methodological changes to the ABS which mean that there has been a break in its time series data for many of the businesses which are of interest to DBT - the NSRB serves to fill some of these information gaps. In addition, issues around the age of the available data from the 'GREAT Britain' campaign evaluation, coupled with the fact that the survey was not a census and, as such, did not include all the companies interviewed in the NSRB, mean that it was not possible to usefully draw upon this data.

In terms of respondent burden, the average interview length was around 28 minutes in wave 7 Q1 and Q2. This was a substantial increase from earlier waves, resulting in greater respondent burden and therefore greater difficulty in achieving interviews. A major review of the questionnaire took place prior to the start of wave 7 Q3/Q4 fieldwork, as the longer length was not sustainable, and this resulted in it being reduced to around 20 minutes. The average interview length has remained at or just over 20 minutes since then.

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

2.10 Confidentiality, transparency and security

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

The survey was conducted by Verian, a specialist research organisation which conforms to the ISO 9001, 20252 and 27001 information security management standards as well as the MRS/ESOMAR codes of conduct. All survey data were anonymised by Verian. All personally identifiable information was removed (for example company name / address / phone number / respondent name) before survey data were passed to the department. Any open-ended responses which may allow third parties to identify an individual were also removed. No directly identifiable data has been made available to DBT throughout the course of the research. All published data were similarly anonymised and data in the wave 9 report was based on groups large enough to be non-disclosive.

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

2.11 Questionnaire

The questionnaire which was administered at wave 9 is shown below. All questions shown were asked in all quarters of wave 9 except where this is specified at the start of each question. Changes between quarters (including additions, deletions and wording changes) are summarised in Section 2.12 which follows the questionnaire.

The questionnaires administered at waves 1 and 2 can be sourced from the wave 2 technical appendix.³⁶ The wave 3, wave 4, wave 5, wave 6, wave 7 and wave 8 questionnaires are available in the respective reports' technical appendices.³⁷

NSRB wave 9 Questionnaire

Q1 : INTRO [ASK ALL] [SINGLE CODE]

Good morning, my name iscalling from GDCC, an independent research agency. We are conducting some research for the Department for Business and Trade.

INTERVIEWER NOTE: Ask to speak to owner/proprietor/MD/other senior decision maker who is best qualified to talk about the company's business - not HR or facilities. Repeat introduction if necessary.

Business Name: [pipe from sample BusinessName]

Business Size: [pipe label from sample xquota1]

GDCC are working with Verian, an independent research agency, on behalf of the Department for Business and Trade to conduct this research. The Department for Business and Trade covers many policies, one of which is to help businesses grow across all regions of the UK and help with strengthening supply chains. Your contribution with this research will help to shape some of their policies.

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

INTERVIEWER NOTE:

- If know already that you are talking to the correct person, code yes.
- Referrals can be taken to any UK site when the contact feels that there is someone in the company who is better placed to answer questions on the company's business activity.
- If person requires further information please select send email and ask for their email address to send them a letter about the research

³⁶ <https://www.gov.uk/government/publications/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs>

³⁷ Wave 3:

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

Wave 4:

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

Wave 5:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/994096/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020-technical-report-wave-5.pdf

Wave 6:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1098887/dit-national-survey-of-registered-businesses-technical-report-wave-6.pdf

Wave 7: <https://assets.publishing.service.gov.uk/media/64d345a25cac650014c2dc77/dbt-national-survey-of-uk-registered-businesses-2022-wave-7-technical-report.pdf>

Wave 8: <https://assets.publishing.service.gov.uk/media/66cef3b3704a0794913a899a/dbt-national-survey-of-uk-registered-businesses-2023-wave-8-technical-report.pdf>

1. Yes
2. Require reassurance email (open, record email address), continue
4. Refused (SCREEN OUT – code as refused)

SCRIPTER NOTE: If reassurance email is requested it should be sent at this point before proceeding.

Q2 [ASK ALL] [SINGLE CODE]

I just want to reassure you that your answers will remain confidential unless you say otherwise, and you have a right to withdraw at any time. This interview will be conducted in accordance with the MRS Code of Conduct and will be recorded and monitored for quality and training purposes in line with the Data Protection Act 2018 and our Privacy Policy. I can provide you with a link to our privacy policy if you are interested.

The interview length depends on your answers but on average lasts 20 minutes.

IF NECESSARY: If now is not convenient we are more than happy to arrange another time to give you a call or remove you from our contact list.

Would you be able to help us with this survey?

INTERVIEWER NOTE: If respondent asks for a copy of privacy notice please select 'Yes, SEND EMAIL, continue' and ask for their email address to send them a copy of the privacy notice, before continuing with the questionnaire.

IF NECESSARY: Your co-operation will ensure that the views expressed are representative of all businesses. Businesses have been randomly chosen from the Government's Inter-Departmental Business Register.

1. Yes, continue
3. Yes, require privacy policy (open, record email) continue
2. No (SCREEN OUT)

SCRIPTER NOTE: If privacy policy email is requested it should be sent at this point before proceeding.

Q4 [ASK ALL] [OPEN]

Please can I take your job title?

IF NECESSARY: Examples could include director, senior director, manager, CEO, CFO, owner/proprietor/MD or other senior decision maker.

--

98. Refused (Exclusive, position fixed)

Q53 : TURNCHK [ASK ALL] [SINGLE CODE]

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

INTERVIEWER NOTE: AN ESTIMATE IS FINE

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

Q47 : NUMEMPPEE [ASK ALL] [SINGLE CODE]

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

IF NECESSARY: This should not include workers who have recently been made redundant.

INTERVIEWER NOTE:

- Do not read out, pick based on what respondent says and then verify with respondent
 - Include full and part time
 - Include temporaries/casuals, but not agency staff
 - Exclude self-employed
 - Exclude owners/partners, but other directors count as employees
- Optional prompt - Is it more or less than 20?
- If they don't know ask them to give an estimate

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

Q5a [ASK ALL] [SINGLE CODE]

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

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

Q5b [ASK ONLY IF Q5a = 2/3] [SINGLE CODE]

Which sector does your business best fit into?

INTERVIEWER NOTE: Do not read out, pick based on what respondent says and then verify with respondent

1. Agriculture, forestry and fishing
2. Mining and quarrying
3. Manufacturing
4. Electricity, gas, steam and air conditioning supply
5. Water supply; sewerage, waste management and remediation activities
6. Construction
7. Wholesale and retail trade; repair of motor vehicles and motorcycles
8. Transportation and storage
9. Accommodation and food service activities
10. Information and communication
11. Financial and insurance activities
12. Real estate activities
13. Professional, scientific and technical activities
14. Administrative and support service activities
15. Public administration and defence; compulsory social security
16. Education
17. Human health and social work activities
18. Arts, entertainment and recreation
19. Other service activities
20. Activities of households as employers; undifferentiated goods-and services-producing activities of households for own use
21. Activities of extraterritorial organisations and bodies

Q5c [ASK IF Q5a = 1 AND SECTOR FROM SAMPLE = 3 MANUFACTURING, OR 7 WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES, OR 9 ACCOMMODATION AND FOOD SERVICE ACTIVITIES, OR Q5b = 3/7/9] [SINGLE CODE]

And within that sector, would you say that your business fits into any of the following sub-sectors?

INTERVIEWER NOTE: Read out, looking for best fit

IF NECESSARY: We consider the 'advanced manufacturing' sector to include businesses making use of advanced science and technology in their production process. This might include digital and automated processes. These processes might be based on results of your own Research & Development, external knowledge, making use of skilled workers, or another source of innovation. Note that this option covers all types of manufacturing, not just food and drink.

1. Advanced manufacturing, that is you make use of advanced science and technology in your production processes
2. Manufacture of Food and Drink
3. Wholesale, relating to food and drink
4. Distillery
5. Any other production of food and drink, including raising livestock or growing foodstuffs
6. None of the above

A19 [ASK ALL] [NUMERICAL]

How many working owners, partners or directors does the business have? Please include yourself if you are a working owner, partner or director.

IF NECESSARY: A working owner or partner may also be a company director or employee, as well as an owner or partner. They should be working in the business.

INTERVIEWER NOTE: Code not applicable if this question is not relevant.

ENTER NUMBER (MINIMUM ZERO, NO NEGATIVE VALUES)

- 97. Don't know
- 98. Refused
- 99. Not applicable

A18 [ASK TO 25% OF RESPONDENTS AT RANDOM, ASK IF A19>0] [NUMERICAL]

How many, if any, of your directors, partners and working owners are women?

IF NECESSARY: If you are unsure, please give your best estimate.

ENTER NUMBER (RANGE = ZERO UP TO VALUE AT A19)
--

- 97. Don't know
- 98. Refused

A17 [ASK IF A19>0] [NUMERICAL]

How many, if any, of your directors, owners and partners are from ethnic minority groups?

IF NECESSARY: If you are unsure, please give your best estimate.

ENTER NUMBER (RANGE = ZERO UP TO VALUE AT A19)
--

- 97. Don't know
- 98. Refused

A16 [ASK IF A17>0 BUT NOT IF A17 = 97 (DON'T KNOW) OR 98 (REFUSED)] [MULTICODE]

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 directors who are from ethnic minority groups belong to?

INTERVIEWER NOTE: Prompt as necessary

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

SCRIPTER NOTE: Dummy variable, do not display

Q11_Q40B_DUMMY Split sample at random, with 50% to answer Q11 and 50% to answer Q40B.

1. Allocate to Q11
2. Allocate to Q40B

INTRO_GROWTH [ASK IF Q11_Q40B_DUMMY = 1]

I'd now like you to think about any plans you may have for the future of your business, even if they are not firm plans yet.

Q11 : GROWATT [ASK IF Q11_Q40B_DUMMY = 1] [SINGLE CODE]

Which of these best describes your thinking on growth?

INTERVIEWER NOTE: Read out

Rotated

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

Q15A_INT [ASK ALL]

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

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

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

INTERVIEWER NOTE: If necessary -

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

Services are transactions in which knowledge, actions or skills are provided by the seller to the buyer, and no physical goods are transferred. Examples include delivery, hospitality, repair & maintenance and entertainment.

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

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

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

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

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

Q15B [ASK ONLY BUSINESSES IN NORTHERN IRELAND] [SINGLE CODE]

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

INTERVIEWER NOTE: If necessary -

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

Services are transactions in which knowledge, actions or skills are provided by the seller to the buyer, and no physical goods are transferred. Examples include delivery, hospitality, repair & maintenance and entertainment.

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

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

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

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

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

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

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

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

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

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

INTERVIEWER NOTE: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 “We are exporting more than we were”.

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

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

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

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

INTERVIEWER NOTE:

- We are now thinking about exports to countries other than the Republic of Ireland'
- If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 “We are exporting more than we were”.

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

Q17A INT [ASK ALL]

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

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

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

INTERVIEWER NOTE: If necessary -

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

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

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

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

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

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

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

Q17B [ASK ONLY BUSINESSES IN NORTHERN IRELAND] [SINGLE CODE]

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

INTERVIEWER NOTE: If necessary -

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

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

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

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

Q17Bi [ASK ONLY BUSINESSES IN NORTHERN IRELAND WHICH HAVE EVER EXPORTED SERVICES (17B = 1/2/3)] [SINGLE CODE]

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

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

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

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

INTERVIEWER NOTE: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 “We are exporting more than we were”.

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

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

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

INTERVIEWER NOTE: If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 “We are exporting more than we were”.

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

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

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

INTERVIEWER NOTES:

- If necessary - ‘We are now thinking about exports to countries other than the Republic of Ireland’
- If respondent has restarted exporting in the last 12 months, having previously lapsed, they should be coded under 2 “We are exporting more than we were”.

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

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

Which of these best describes your business?

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

Q19 [ASK IF PRODUCTS/SERVICES ARE UNSUITABLE FOR EXPORT (Q19a = 1)] [MULTICODE]

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

INTERVIEWER NOTE: Do not read out

1. It's only me, or the service is only provided by me, or I'm a one man band
2. Can't upscale my business because I'm the only one who can deliver the service / I have specific expertise
3. It's just a one-off (e.g. a single restaurant)
4. It's a local service or business only
5. My product or service is not transportable
6. My product or service is not unique or special enough to export
7. I don't believe people overseas would want my product or service
12. My product/service is only relevant in this country
10. I don't believe my product or service is cost competitive in the international markets
13. Costs (too high)
11. It is not lawful to sell my product in some overseas markets (i.e. legislation required in some markets)
14. Reasons relating to UK legislation
8. I can't make or supply enough
15. Provide a service (so can't export)
16. Products are perishable/difficult to export
17. Because of the nature of the business
18. Can't export / Not suitable / Retail not suitable for export
19. Not looking to export
9. Other (write in)

**Q19x [ASK IF PRODUCTS/SERVICES COULD BE DEVELOPED FOR EXPORT (Q19a = 2)]
[MULTICODE]**

Given that your products or services could be suitable for export, are there any particular reasons why you have not exported yet?

INTERVIEWER NOTE: Do not read out

1. I have enough business in this country, so don't need to sell overseas
2. I don't have the capacity to produce any more
3. I don't believe my product or service is cost competitive in the international markets
4. Shipping costs are too high
5. Tariffs or duties are too high
6. I haven't researched other markets so I don't know if there is demand for my product/service
7. I don't know what I need to do in order to export
8. I'm not interested in exporting
9. No particular reason / Other priorities / Haven't got round to it
10. I'm not sure the effort would be worth it
11. It's too risky in the current economic environment
12. I don't have time to look into exporting
97. Other (write in)

Q24A1 [ASK IF HAVE EVER EXPORTED: IF 15A = 1 OR 15B = 1/2/3 OR 17A = 1 OR 17B = 1/2/3] [SINGLE CODE]

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

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

**Q25A [ASK IF HAVE EVER EXPORTED: IF 15A = 1 OR 15B = 1/2/3 OR 17A=1 OR 17B = 1/2/3]
[MULTICODE]**

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

IF NECESSARY: By exporting, this means any goods or services sold by a UK company to an individual or organisation based outside of the UK. This includes transactions made with any branch or subsidiary that is located outside of the UK

INTERVIEWER NOTES:

- Read out, excluding codes 12, 13 and 98
- The United Arab Emirates consists of seven separate Emirates which are Dubai, Abu Dhabi, Sharjah, Ajman, Umm al-Quwain, Ras al-Khaimah, and Fujairah

SCRIPTER NOTE: Randomise order, with codes 12, 13 and 98 at the bottom of list

1. USA
2. Australia
3. China
4. New Zealand
5. Japan
6. South Africa
8. Brazil
16. India
17. Canada
18. Mexico
19. Any of the following Gulf states: United Arab Emirates (UAE), Bahrain, Kuwait, Oman, Qatar, Saudi Arabia
20. South Korea
11. The European Union (EU)
21. Turkey
22. Israel
23. Switzerland
12. Any other countries or regions
13. None of these
98. Don't know

Q25C [ASK IF Q25A = 12] [MULTICODE]

Of the other countries or regions you have exported to over the last five years, does this include any of the following:

INTERVIEWER NOTE: Read out, excluding codes 7 and 98

SCRIPTER NOTE: Randomise order, with codes 7 and 98 at the bottom of list

1. Peru
2. Chile
3. Malaysia
4. Brunei
5. Vietnam
6. Singapore
7. None of these
98. Don't know

Q25B [ASK IF HAVE EVER EXPORTED BUT HAVEN'T SELECTED ALL COUNTRIES AT Q25A: IF (15A = 1 OR 15B = 1/2/3 OR 17A = 1 OR 17B = 1/2/3) AND NOT (Q25A = ALL OF 1,2,3,4,5,6,8,11,12,16,17,18,19,20,21,22,23)] [MULTICODE]

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

IF NECESSARY: By exporting, this means any goods or services sold by a UK company to an individual or organisation based outside of the UK. This includes transactions made with any branch or subsidiary that is located outside of the UK.

INTERVIEWER NOTES:

- Read out, excluding codes 12, 13 and 98
- The United Arab Emirates consists of seven separate Emirates which are Dubai, Abu Dhabi, Sharjah, Ajman, Umm al-Quwain, Ras al-Khaimah, and Fujairah

SCRIPTER NOTES:

- Do not show country code to interviewer if it was selected at Q25A
- Randomise order, with codes 12, 13 and 98 at the bottom of list

1. USA
2. Australia
3. China
4. New Zealand
5. Japan
6. South Africa
8. Brazil
16. India
17. Canada
18. Mexico
19. Any of the following Gulf States: United Arab Emirates (UAE), Bahrain, Kuwait, Oman, Qatar, Saudi Arabia
20. South Korea
11. The European Union (EU)
21. Turkey
22. Israel
23. Switzerland
12. Any other countries or regions (DNR)
13. None of these (DNR, Exclusive)
98. Don't know (DNR, Exclusive)

Q25D [ASK IF Q25B = 12] [MULTICODE]

Of the other countries or regions you have seriously considered exporting to over the last five years, does this include any of the following:

INTERVIEWER NOTE: Read out, excluding codes 7 and 98

SCRIPTER NOTE: Randomise order, with codes 7 and 98 at the bottom of list

1. Peru
2. Chile
3. Malaysia
4. Brunei
5. Vietnam
6. Singapore
7. None of these
98. Don't know

SCHAIN1 [ASK ALL] [SINGLE CODE]

Which of the following best describes your business's experience of supply chains?

By supply chains we mean being able to source the inputs or supplies needed to produce your goods or services.

INTERVIEWER NOTE: Read out

1. My business has never experienced supply chain issues
2. My business is currently experiencing supply chain issues
3. My business has experienced supply chain issues within the last 3 years, but these are now resolved
4. My business has experienced supply chain issues more than 3 years ago, but these are now resolved
5. This isn't applicable because my business does not have a supply chain
6. Don't know (Do not read out)

SCHAIN2 [ASK IF SCHAIN1 = 2/3] [MULTICODE]

Which of the following do you feel caused the supply chain issues you [IF SCHAIN1 = 2: are currently experiencing / IF SCHAIN2 = 3: experienced within the last few years]?

INTERVIEWER NOTE: Read out

Random

1. COVID-19
2. EU Exit (Brexit)
3. War or conflict
4. Rising energy prices
5. The cost of shipping
6. General economic/inflationary pressure (including cost of living pressures)
7. Difficulty sourcing suitable or affordable parts
8. Strikes or Industrial action
98. Any other reason (specify)
99. Don't know (Do not read out)

SCHAIN3 [ASK IF SCHAIN1 = 3] [MULTICODE]

How were you able to resolve the supply chain issues you experienced in the last few years?

INTERVIEWER NOTE: Do not read out

1. Restructured businesses
2. Found alternative suppliers
3. Found alternative routes to export
4. Found alternative suppliers in the UK
5. Found alternative suppliers overseas
6. Working with different freight/shipping companies
7. Got advice from trade intermediaries/consultants
8. Advice/support from Export Support Service - International Markets
9. Advice/support on gov.uk
12. Advice/support on great.gov.uk
13. Advice/support from 'Ask the export support team a question' on gov.uk or 'Contact us' form on great.gov
14. Advice from a DBT International Trade Advisor
10. Advice/support from other government support service
11. Advice/support from business representative organisations or membership bodies (e.g. Chambers of Commerce or the Institute of Directors)
98. Any other reason (specify)
99. Don't know

QIMP1 [ASK ALL] [SINGLE CODE]

In the last 12 months has your business imported goods and services from outside the UK?

INTERVIEWER NOTE: Read out

1. Yes
2. No, not in the last 12 months but we have done this previously
3. No, we have never done this
4. Don't know (DO NOT READ OUT)

Q24D [ASK ALL WHO HAVE EVER EXPORTED OR WHOSE PRODUCTS OR SERVICES COULD BE DEVELOPED FOR EXPORT, AND HAVE EXPORTED OR CONSIDERED EXPORTING TO A CORE COUNTRY (USA, AUSTRALIA, EU, INDIA OR ONE OF THE GULF STATES) (IF Q25A = 1/2/11/16/19 OR Q25B = 1/2/11/16/19)] [SINGLE CODE]

On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following when it comes to exporting to [RANDOMLY SELECT ONE OF CORE COUNTRIES MENTIONED AT Q25A or Q25B]?

INTERVIEWER NOTES: Read out each statement in turn

SCRIPTER NOTES:

- Select country to text fill in question text from core countries selected at Q25A or Q25B (Q25A = 1, 2, 11, 16 or 19 OR Q25B = 1, 2, 11, 16 or 19)
- Display as dynamic grid and randomise order of statements
- Include Don't know response for each statement
- Data values should be 1 to 11 and 12 for Don't know. So, 1:0, 2:1, 3:2 etc up to 11:10 and 12: Don't know

1. Cost
2. Lack of knowledge
3. The capacity of your business to export and cater for international contracts, for example having the right number of people, machinery, skill levels etc.
4. Access to contacts, customers and the right networks
5. Time taken to comply with export procedures

SCRIPTER NOTES:

- If respondent gives a score of 6 or higher to more than one statement at Q24D, randomly select one of them and route respondent to the equivalent question at Q24D1/2/3/4/5 accordingly
- If respondent gives a score of 6 or higher to only one statement at Q24D, route respondent to the equivalent question at Q24D1/2/3/4/5 accordingly
- If respondent does not give any codes at Q24D a score of 6 or higher, skip to logic at Q24xE

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

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-9, 37, 38, 99

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

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

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-10, 14

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

**Q24D3 [ASK IF Q24D = 3 (CAPACITY) IS SELECTED IN THE LOGIC AFTER Q24D]
[MULTICODE]**

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-9

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

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

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-6

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

**Q24D5 [ASK IF Q24D = 5 (TIME TAKEN) IS SELECTED IN THE LOGIC AFTER Q24D]
[MULTICODE]**

You mentioned the time taken to comply with export procedures as an important barrier. Which of the following specific time issues, if any, have caused you genuine difficulties or put you off exporting?

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Group codes 1-3 and 4-6 together in randomisation. Randomise within those groupings and randomise the order of the groups themselves.

1. Time to research and understand what UK government processes and forms need to be completed to export
2. Time to research and understand what processes and forms need to be completed for the country of destination
3. Time to bring together all the information required to complete all the required declarations or other documentation
4. Time to complete UK Government customs declarations
5. Time to complete country of destination forms
6. Time related to complete import procedures or demonstrate goods comply with standards in the destination country
7. Time needed to understand rules of origin
97. Other (specify)
98. Don't know
99. None of the above

Q24xE [ASK ALL WHO HAVE EVER EXPORTED OR WHOSE PRODUCTS OR SERVICES COULD BE DEVELOPED FOR EXPORT AND HAVE NOT ALREADY ANSWERED Q24D (IF ((15A = 1 OR 15B = 1/2/3 OR 17A = 1 OR 17B = 1/2/3) OR (Q19a = 2)) AND NOT (Q25A = 1/2/11/16/19 OR Q25B = 1/2/11/16/19))] [SINGLE CODE]

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

INTERVIEWER NOTES:

- Read out each statement in turn
- This applies to all countries you may export to

SCRIPTER NOTES:

- Display as dynamic grid and randomise order of statements
 - Include Don't know response for each statement
 - Data values should be 1 to 11 and 12 for Don't know. So, 1:0, 2:1, 3:2 etc up to 11:10 and 12: Don't know
1. Cost
 2. Lack of knowledge
 3. The capacity of your business to export and cater for international contracts, for example having the right number of people, machinery, skill levels etc.
 4. Access to contacts, customers and the right networks
 5. Time taken to comply with export procedures

SCRIPTER NOTES:

- If respondent gives a score of 6 or higher to more than one statement at Q24xE, randomly select one of them and route respondent to the equivalent question at Q24xE1/2/3/4/5 accordingly
- If respondent gives a score of 6 or higher to only one statement at Q24xE, route respondent to the equivalent question at Q24xE1/2/3/4/5 accordingly
- If respondent does not give any codes at Q24xE a score of 6 or higher, skip to text before FTA1

**Q24xE1 [ASK IF Q24xE = 1 (COST) IS SELECTED IN THE LOGIC AFTER Q24xE]
[MULTICODE]**

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-9, 13-15

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

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

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-10, 14

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

Q24xE3 [ASK IF Q24xE = 3 (CAPACITY) IS SELECTED IN THE LOGIC AFTER Q24xE] [MULTICODE]

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-8

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

**Q24xE4 [ASK IF Q24xE = 4 (ACCESS) IS SELECTED IN THE LOGIC AFTER Q24xE]
[MULTICODE]**

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Randomise order of codes 1-6

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

**Q24xE5 [ASK IF Q24xE = 5 (TIME TAKEN) IS SELECTED IN THE LOGIC AFTER Q24xE]
[MULTICODE]**

You mentioned time taken to comply with export procedures as an important barrier. Which of the following specific time issues, if any, have caused you genuine difficulties or put you off exporting?

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Group codes 1-3 and 4-6 together in randomisation. Randomise within those groupings and randomise the order of the groups themselves.

1. Time to research and understand what UK government processes and forms need to be completed to export
2. Time to research and understand what processes and forms need to be completed for the country of destination
3. Time to bring together all the information required to complete all the required declarations or other documentation
4. Time to complete UK Government customs declarations
5. Time to complete country of destination forms
6. Time related to complete import procedures or demonstrate goods comply with standards in the destination country
7. Time needed to understand rules of origin
97. Other (Specify)
98. Don't know
99. None of the above

[ASK ALL]

INTERVIEWER NOTE: Please read out the following Free Trade Agreement Questions clearly and slowly.

The next set of questions are about Free Trade Agreements between the UK Government and other countries.

Free Trade Agreements (FTAs) are made between two or more countries and set out the preferential rules for buying or selling goods or services between them. They reduce restrictions on trade, which can make buying and selling easier and cheaper.

FTA1 [ASK ALL] [SINGLE CODE]

How much do you know about the UK's Free Trade Agreements?

INTERVIEWER NOTE: Read out

1. A great deal
2. A fair amount
3. I've heard about them but don't know much about them
4. I don't know anything about them
5. Don't know (Do not read out)

FTA_INTRO [SHOW IF EVER EXPORTED OR EVER IMPORTED (Q15A = 1 OR Q15B = 1-3 OR Q17A = 1 OR Q17B = 1-3 OR QIMP1 = 1-2)]

When two countries have a trade agreement in place, they typically reduce barriers to trade, such as reduced customs duties on certain goods or services.

INTERVIEWER NOTE: Read out the following only if the respondent needs an example

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

INTERVIEWER NOTE: Read out if necessary (if respondent knows little or nothing about FTAs)

Even though you may have limited knowledge of the UK's Free Trade Agreements, we are still interested to hear whether they might be relevant to your business and gather some further opinion on this topic.

**FTA2 [ASK IF EVER EXPORTED (Q15A = 1 OR Q15B = 1-3 OR Q17A = 1 OR Q17B = 1-3)]
[MULTICODE]**

Thinking about the goods or services you most frequently **export**, are they eligible for any of the following benefits?

INTERVIEWER NOTE: Read out

Random

1. Reduced customs duties
2. Increased mobility of staff
3. Ability to participate in government procurement in partner country
4. Reciprocal recognition of qualifications, for example architectural qualifications being valid in UK and partner countries
5. Sanitary and phytosanitary arrangements (SPS), for example rules about moving plants between partner countries
6. Ease of investment in each other's countries
8. Ability to easily transfer data between countries
11. Mutual recognition of product regulation or testing requirements
9. Other (write in)
10. None of these (DO NOT READ OUT)
98. Don't know (DO NOT READ OUT)

FTA3 [ASK IF GOODS AND SERVICES EXPORTED ARE ELIGIBLE FOR BENEFITS (FTA2 = 1-6/8/11)] [SINGLE CODE]

You mentioned that your goods or services have been eligible for (RANDOMLY SELECT CODE 1-6/8/11 FROM FTA2). How often do the goods or services you export benefit from this?

INTERVIEWER NOTE: Read out

1. Always or almost always
2. Most of the time
3. Some of the time
4. Never or almost never
98. Don't know (DO NOT READ OUT)

FTA4 [ASK IF EVER IMPORTED (QIMP1 = 1-2)] [MULTICODE]

Thinking about the goods or services you most frequently **import**, are they eligible for any of the following benefits?

INTERVIEWER NOTE: Read out

Random

1. Reduced customs duties
2. Increased mobility of staff
3. Ability to participate in government procurement in partner country
4. Reciprocal recognition of qualifications, for example architectural qualifications being valid in UK and partner countries
5. Sanitary and phytosanitary arrangements (SPS), for example rules about moving plants between partner countries
6. Ease of investment in each other's countries
8. Ability to easily transfer data between countries
11. Mutual recognition of product regulation or testing requirements
9. Other (write in)
10. None of these (DO NOT READ OUT)
98. Don't know (DO NOT READ OUT)

FTA5 [ASK ALL] [STATEMENT GRID]

To what extent do you agree or disagree with the following statements, relating to Free Trade Agreements? Would you say that you agree strongly, agree slightly, neither agree nor disagree, disagree slightly or disagree strongly that...

Random

		Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(Don't know)
1	FTAs between the UK and other countries will benefit my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	I'm confident I would know how to trade through an FTA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	The government is providing information and support to help businesses like mine access the benefits of FTAs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	FTAs between the UK and other countries will benefit my sector/industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FTA6 [ASK TO RANDOM 50% OF RESPONDENTS] [MULTICODE]

Where would you go to find information and support relating to Free Trade Agreements?

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Keep codes 2 and 11 together but randomise the order of these.

Random

1. The UK government (including the Department for Business and Trade)
2. Gov.uk
11. great.gov.uk
3. Trade bodies and business groups
5. Business or professional contacts
6. Consultancy firm
7. A legal advice firm/lawyers
8. A freight, parcel, or logistics specialist (ship, train, truck, or airplane)
10. An in-market distributor
97. Anywhere else (specify)
98. Don't know (DO NOT READ OUT)
99. Nowhere/I wouldn't do this (DO NOT READ OUT)

Q27: EXPORT [ASK THOSE WHO HAVEN'T EXPORTED IN THE PAST 12 MONTHS AND ARE NOT UNABLE TO EXPORT (NOT (Q15Ai = 1 OR Q15Bi = 1/2/3 OR Q17Ai = 1 OR Q17Bi = 1/2/3) AND NOT (Q19A = 1)) [SINGLE CODE]

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

INTERVIEWER NOTE: If respondent says they already do export but were just taking a break clarify when they next expect to export and code accordingly

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

Q30: EXP_KNOW [ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT (NOT Q19a = 1)] [STATEMENT GRID]

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

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

Q31_DUMMY [IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT (NOT Q19a = 1)] [FOR SCRIPTING, DO NOT DISPLAY]

Split sample at random, with 50% to answer Q31 and 50% to answer Q31a.

1. Allocate to Q31
2. Allocate to Q31a

Q31: EXP_STAT [ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT AND ALLOCATED TO Q31 (NOT Q19a = 1 AND Q31_DUMMY = 1)] [STATEMENT GRID]

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

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

Random

		Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(Don't know)
3	There is a lot of support available to help small and medium businesses start exporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	There is a lot of opportunity for my business to grow internationally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	There are too many risks in taking a business international	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	There would not be enough demand for my business overseas to make it worthwhile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	There are enough opportunities for growth within the UK to mean my business isn't interested in exports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	There is a lot of demand for UK products or services around the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q31a [ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT AND ALLOCATED TO Q31a (NOT Q19a = 1 AND Q31_DUMMY = 2)] [STATEMENT GRID]

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

Random

		Yes	No	Don't know
1	Managerial time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Staff capacity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Staff skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Capability to assess international competition for your product or service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Capability to assess the cost of exporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Capability to develop an export business plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Adequate supply chains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Access to support & advisory services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Financial resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Capability to research and understand Free Trade Agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q33: EXPAD_B [ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT (NOT Q19a = 1)] [SINGLE CODE]

Have you ever sought advice and support about exporting?

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

Q34b [ASK ONLY IF BUSINESS DOES NOT SAY THEIR PRODUCTS OR SERVICES WOULD NEVER BE SUITABLE FOR EXPORT (NOT Q19a = 1)] [MULTICODE]

Which, if any, of the following UK Government trade support services are you aware of?

INTERVIEWER NOTE: Read out

Random

1. Export Support Service, or 'Ask the export support team a question' on GOV.UK
2. International Trade Advisors
3. International Market Export Support (previously known as Enhanced International Support Service)
4. Digital Exporting Programme or the 'E-exporting Programme'
5. The UK Export Academy
6. Gov.uk tools such as the 'Check how to export goods', or 'Check duties and customs procedures for exporting goods'
11. Gov.uk services such as 'report a trade barrier' or 'check international trade barriers'
12. UK export licensing system (LITE and SPIRE)
13. Import case management system (ICMS), or the service to apply for an import licence or export certificate
14. Help to Grow: helptogrow.campaign.gov.uk
15. Great.gov.uk
9. None of these (DO NOT READ OUT – SINGLE CODE – FIX AT END)
10. Don't know (DO NOT READ OUT – SINGLE CODE – FIX AT END)

Q34c [ASK IF AWARE OF ANY GOVERNMENT SUPPORT SERVICES (Q34b = 1-6 OR 11-15)] [MULTICODE]

And which, if any, of these have you used?

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Only display codes mentioned at Q34b

Random (same order as Q34b)

1. Export Support Service, or 'Ask the export support team a question' on GOV.UK
2. International Trade Advisors
3. International Market Export Support (previously known as Enhanced International Support Service)
4. Digital Exporting Programme or the 'E-exporting Programme'
5. The UK Export Academy
6. Gov.uk tools such as the 'Check how to export goods', or 'Check duties and customs procedures for exporting goods'
11. Gov.uk services such as 'report a trade barrier' or 'check international trade barriers'
12. UK export licensing system (LITE and SPIRE)
13. Import case management system (ICMS), or the service to apply for an import licence or export certificate
14. Help to Grow: helptogrow.campaign.gov.uk
15. Great.gov.uk
9. None of these (DO NOT READ OUT – SINGLE CODE – FIX AT END)
10. Don't know (DO NOT READ OUT – SINGLE CODE – FIX AT END)

**Q40B [ASK TO RANDOMLY SELECTED HALF OF SAMPLE (Q11_Q40B_DUMMY = 2)]
[SINGLE CODE]**

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

INTERVIEWER NOTE: Read out

SCRIPTER NOTE: Invert scale to half of sample

1. Increase substantially
2. Increase a little
3. Stay about the same
4. Decrease a little
5. Decrease substantially
6. Don't know (DO NOT READ OUT)

Q39 : AD_AWARE [ASK ALL] [SINGLE CODE]

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

1. Yes
2. No
3. Not sure

**Q40 : AD_SOURCE [ASK ONLY IF AWARE OF ADVERTISING (Q39 : AD_AWARE = 1)]
[MULTICODE]**

Where did you see or hear this information or advertising?

INTERVIEWER NOTE: Do not read out

1. TV programme or news
2. TV advertising
3. Radio programme or news
4. Radio advertising
5. National newspaper article
6. National newspaper advertising
7. Local newspaper article
8. Local newspaper advertising
9. Magazine article
10. Magazine advertising
11. Trade press article
12. Trade press advertising
35. Through the post (direct mail)
13. LinkedIn
14. X, formerly Twitter
15. Facebook
29. Instagram
16. Other social networking sites
30. Gmail
31. Search engine or Google or Bing
27. Great.gov.uk website
28. UK Export Finance website
18. On another website (Specify)
19. Advertising on the internet
36. Online article
20. Marketing email
21. Marketing telephone call
22. At an event
23. Poster or billboard
32. Screens in public places
24. Accountant or business advisor
25. Word of mouth
33. International Trade Week
34. Digital display banners
37. Business Organisation or Trade Association
26. Other (Specify)
98. Don't know

Q40 : AD_SOURCE B [ASK ONLY IF AWARE OF ADVERTISING (Q39 : AD_AWARE = 1)] [MULTICODE]

Can you briefly describe any elements of the advertisements or publicity you have seen?

INTERVIEWER NOTE: Do not read out

1. The phrase "Made in the UK, Sold to the World"
2. The phrase "Made in [NAME OF A CITY OR REGION], Sold to the world"
3. Another phrase starting with "Made in"
4. Any mention of a UK city or region
5. Showed a business which exports their goods
6. Mentioned how many countries the business in the advert sells to
7. Gov.uk / HM Government / UK Government (logo)
8. The phrase "Grow your sales internationally"
9. The phrase "Become an export expert"
11. UK Export Academy
14. Export advice / webinar / workshop
15. Grow sales abroad; opportunity abroad / globally; new markets around the world; grow business internationally
16. The GREAT logo
17. Reference to free trade agreements (FTAs)
98. Other (Specify)
99. Can't remember anything

AD4 [ASK ONLY IF AWARE OF ADVERTISING (Q39 : AD_AWARE = 1)] [MULTICODE]

Who do you think was responsible for the information or advertising you remember seeing?

INTERVIEWER NOTE: Do not read out

1. UK Government
2. Scottish Government
3. Welsh Assembly
4. Government of Northern Ireland
5. Department for Business and Trade (or Department for International Trade (DIT) or Department for Trade and Industry (DTI))
6. UK Export Finance (UKEF)
7. Foreign, Commonwealth and Development Office (FCDO)
8. HMRC
9. Made in UK, Sold to the World
10. GREAT / Exporting is GREAT
11. Federation of Small Businesses
12. Chambers of Commerce
13. Trade association
14. UK banks (e.g. Barclays, HSBC, Lloyds Bank, RBS, Santander)
95. Other (Specify)
98. Can't remember (Exclusive)

AD5 [ASK ALL] [SINGLE CODE]

For the next few questions I'd like you to look at some images on a website. Could you open your browser and type in the following website address? It is www.nsrbsurvey.co.uk.

INTERVIEWER NOTES:

- Do not read out
 - Dictate the website address slowly and clearly and repeat if necessary, then code below as appropriate
1. Respondent can access website
 2. Respondent unable to access website

AD7 [ASK ALL WHO CAN ACCESS THE WEBSITE (AD5 = 1)] [SINGLE CODE]

You should see a heading saying 'SCREEN 1'. This screen shows images from a range of adverts. Please scroll down and when you have seen all of the images, I'd like you to tell me whether you have seen any of these adverts, or adverts very similar to them, since October 2022.

SCRIPTER NOTE: Images from MIUK campaign

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

AD8 [ASK IF RECOGNISE MIUK ADS (AD7 = 1)] [MULTICODE]

And where did you see those adverts? Were they on or in...

INTERVIEWER NOTES:

- If necessary – I'm still talking about the ads on Screen 1
- Read out, code all that apply

SCRIPTER NOTE: Group codes 1-5, 6-8, 9-10 and randomise group order and code order within groups (but hold code 5 at bottom of the 1-5 group). Hold codes 11 and 98 at bottom of list.

1. Facebook
2. Instagram
3. X, formerly known as Twitter
4. Google or Bing
5. Online adverts on a website
6. A national newspaper or national magazine
7. A local newspaper or local magazine
8. A trade magazine or trade paper
9. A billboard or poster in a public place
10. A digital radio site
11. Somewhere else (Specify)
98. Don't know

**AD11 [ASK ALL WHO CAN ACCESS WEBSITE AND DID NOT SAY 'COULD NOT SEE ADS'
(AD5 = 1 AND NOT AD7 = 3)] [SINGLE CODE]**

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

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

**AD12 [ASK ALL WHO CAN ACCESS WEBSITE AND DID NOT SAY 'COULD NOT SEE ADS'
(AD5 = 1 AND NOT AD7 = 3)] [STATEMENT GRID]**

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

Random

		Agree strongly	Agree slightly	Disagree slightly	Disagree strongly	Don't know
1	The advertising is relevant to you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	The advertising told you something new	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	This advertising stands out from other advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	This advertising is clear and easy to understand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	You trust the information given by these adverts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	The adverts made me realise the government can help me export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	The adverts showed new trade deals are creating opportunities for businesses like mine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	The adverts made it clear where to go to for exporting information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	The ads made me think about exploring exporting options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

AD13A [ASK IF RECOGNISE ADS (AD7 = 1)] [MULTICODE]

What, if anything, have you done as a result of seeing or hearing these adverts?

INTERVIEWER NOTES:

- Do not read out
- Code all that apply
- Prompt: Anything else?

14. Visited the great.gov.uk website or clicked the link in the advert
19. Visited / found answers on DBT's great.gov guidance and support pages
20. Sent an enquiry to the Export Support Team for further advice
3. Enrolled for the UK Export Academy or found out more about the programme
4. Attended an exporting webinar / event by Department for Business and Trade / Department for International Trade (DIT)
5. Visited the Department for Business and Trade / Department for International Trade (DIT) website
7. Phoned or visited UK Export Finance
15. Registered for International Trade Week events
17. Contacted an International Trade Advisor
18. Researched Free Trade Agreements
8. Done a basic assessment of your company's export potential e.g. looked at whether the good or service can be exported or gained commitment of Directors or Board
9. Assessed company's current readiness to export e.g. looked at staffing or resources costs/sales literature or export pricing
10. Investigated the rules of doing business with a country e.g. investigated regulation and rules of doing business with the country/tax/distribution and logistics/payment options/representatives/paperwork
11. Researched other aspects of an overseas market e.g. researched demand, competitors, customers, distribution channels, promotion or visited the country
12. Developed an export business plan e.g. formally planning financing, drawing up a sales and marketing plan, selecting distribution channels or developing market entry strategies
13. Something else (Specify)
97. Nothing
98. Don't know

AD13B [ASK ALL WHO CAN VIEW THE ADS (AD7 = 1/2/98)] [MULTICODE]

And is there anything else that you plan to do, or will consider doing, as a result of seeing these adverts?

INTERVIEWER NOTES:

- Do not read out
- Code all that apply
- Prompt: Anything else?

14. Visit the great.gov.uk website or click the link in the advert
19. Visit DBT's great.gov guidance and support pages
20. Send an enquiry to the Export Support Team for further advice
3. Enrol for the UK Export Academy or find out more about the programme
4. Attend an exporting webinar / event by Department for Business and Trade / Department for International Trade (DIT)
5. Visit the Department for Business and Trade / Department for International Trade (DIT) website
7. Phone or visit UK Export Finance
15. Register for International Trade Week events
17. Contact an International Trade Advisor
18. Research Free Trade Agreements
8. Do a basic assessment of your company's export potential e.g. look at whether the good or service can be exported or gain commitment of Directors or Board
9. Assess company's current readiness to export e.g. look at staffing or resources costs/sales literature or export pricing
10. Investigate the rules of doing business with a country e.g. investigate regulation and rules of doing business with the country/tax/distribution and logistics/payment options/representatives/paperwork
11. Research other aspects of an overseas market e.g. research demand, competitors, customers, distribution channels, promotion or visit the country
12. Develop an export business plan e.g. formally planning financing, drawing up a sales and marketing plan, selecting distribution channels or develop market entry strategies
13. Something else (Specify)
97. Nothing
98. Don't know

AD14 [ASK IF THERE IS A CHANCE THEY WILL START EXPORTING IN THE FUTURE AND RECOGNISED ADS (Q27 = 1/2 AND AD7 = 1)] [SINGLE CODE]

You mentioned earlier that there was some possibility that you might start exporting in the future. To what extent would you say that your interest in exporting was a direct result of the adverts that you saw before today? Would you say the advertising campaign...

1. Was 100% responsible - you definitely wouldn't be considering exporting if you hadn't seen the campaign
2. Was 75% responsible – the campaign was the most important factor in making you interested in exporting, but it was something that you'd vaguely been considering beforehand
3. Was 50% responsible – you were already thinking about exporting, but the campaign still played an important role in raising your interest
4. Was 25% responsible – you were already thinking seriously about exporting and the campaign only played a small part in your decision
5. The campaign had no real impact at all on your interest in exporting

AD15 [ASK IF STARTED EXPORTING OR EXPORT MORE IN THE LAST 12 MONTHS AND RECOGNISED ADS ((16A= 1/2 OR 16B = 1/2 OR 16C = 1/2 OR 18A = 1/2 OR 18B = 1/2 OR 18C = 1/2) AND (AD7 = 1))] [SINGLE CODE]

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

1. Was 100% responsible - you definitely wouldn't be exporting more if you hadn't seen the campaign
2. Was 75% responsible – the campaign was the most important factor in growing exports, but it was something that you'd vaguely been considering beforehand
3. Was 50% responsible – you were already thinking about growing exports, but the campaign still played an important role in raising your interest
4. Was 25% responsible – you were already thinking seriously about growing exports and the campaign only played a small part in your decision
5. The campaign had no real impact at all on your export growth

AD6B [ASK ALL WHO CAN ACCESS THE WEBSITE (AD5 = 1)] [SINGLE CODE]

We'd now like you to look at the website again. (IF NECESSARY: This is www.nsrbsurvey.co.uk). Please click the arrow to move to Screen 2. You should see a heading saying 'SCREEN 2'. Before today had you seen any of these adverts (or adverts very similar to them) for the UK Export Academy or great.gov help and support services on this screen?

INTERVIEWER NOTES:

- If necessary – These adverts have been running since July 2023
- Probe to scroll down the page
- If necessary – There are no further questions about this advertising or that will require you to look at this website

SCRIPTER NOTE: Images of 'UK Export Academy' advert ('Become an Export Expert') and 3 x gov.uk help and support services ads ('Selling Overseas', 'Grow Your International Sales' and 'Grow Your Business In New Markets') on Screen 2

1. Yes – have seen the 'UK Export Academy' adverts (purple texts and images)
5. Yes – have seen the 'great.gov help and support services' adverts (blue text and images)
3. No – haven't seen adverts
4. Respondent could not view images on website
98. Don't know

Re-Cont [ASK ALL] [SINGLE CODE]

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

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

1. Agreed to recontact
2. Did not agree to recontact

Q49 : RECONTACT [ASK ALL WHO AGREED TO RECONTACT (Re-Cont = 1)] [MULTICODE]

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

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

INTERVIEWER NOTE: Record both email and telephone number if respondent agrees

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

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

Q50 : DATA [ASK ALL] [SINGLE CODE]

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

These might include records kept by HM Revenue and Customs and the Office for National Statistics such as, but not limited to, the Inter-Departmental Business Register (IDBR). This would be possible by Verian sharing the serial number attached to your business on the IDBR, to the Department for Business and Trade.

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

1. Yes
2. No

Q50A [ASK RANDOM QUARTER SAMPLE] [SINGLE CODE]

At the beginning of this interview we mentioned that it would be recorded, which only Verian has access to. The Department for Business and Trade would be interested in listening to some of the recordings. Do we have your permission to pass your interview, which include your name and survey answers, on to them?

1. Yes
2. No

Q51 : NAME [ASK ALL] [OPEN]

And can I please take your name?

IF QUERIED: This is to allow our quality assurance team to validate that the interview with you today was conducted correctly. If you gave permission for us to contact you about further research, your name will also be used for that. Your name will not be associated with any of the answers that you have given and will remain confidential (FILTER: Include the following addition for those also asked Q50A - unless you have given consent in the previous question).

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98. Refused (Exclusive)

T4 [ASK ALL]

Finally, I would just like to confirm that my name is <?> and I've been calling you from GDCC. This interview was conducted on behalf of Verian and the Department for Business and Trade in accordance with the MRS Code of Conduct and with our Privacy Policy which can be found at www.gdcc.com/privacy-statement.

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

IF YES:

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

To find our further information about my organisation or the nature of this particular survey you can contact GDCC's Data Protection Officer or the research team at Verian.

Contact Details (Redacted)

Thank you very much for your time and goodbye.

IF NO:

Thank you very much for your time and goodbye.

2.12 Question changes

Although the format of the survey allows for it, there were no additions or removals of questions during wave 9. The only changes to questions were wording changes as a result of the introduction of the new fieldwork supplier (GDCC) from Q3/Q4. These changes can be found in Figure 2.1 below.

Figure 2.1: Questions changed between quarters

Quarter changed	Question number	Question text and description of change
Q3/Q4	Q1: INTRO	<p>Change to introduction text as a result of change in fieldwork supplier from the start of Q3/Q4:</p> <p>Q1 & Q2: Good morning, my name iscalling from Verian, an independent research agency. We are conducting some research for the Department for Business and Trade.</p> <p>Q3/Q4: Good morning, my name iscalling from GDCC, an independent research agency. We are conducting some research for the Department for Business and Trade. GDCC are working with Verian, an independent research agency, on behalf of the Department for Business and Trade to conduct this research.</p>
Q3/Q4	T4	<p>Changes to text as a result of change in fieldwork supplier from the start of Q3/Q4:</p> <p>Q1 & Q2: Finally, I would just like to confirm that my name is <?> and I've been calling you from Verian. This interview was conducted on behalf of the Department for Business and Trade in accordance with the MRS Code of Conduct and with our Privacy Policy which can be found at https://www.veriangroup.com/uk-surveys.</p> <p>Q3/Q4: Finally, I would just like to confirm that my name is <?> and I've been calling you from GDCC. This interview was conducted on behalf of Verian and the Department for Business and Trade in accordance with the MRS Code of Conduct and with our Privacy Policy which can be found at www.gdcc.com/privacy-statement.</p> <p>Q1 & Q2: To find out further information about my organisation or the nature of this particular survey you can contact the Telephone Centre Manager on the following numbers during office hours:</p> <p>Contact Details (Redacted)</p>

		<p>Q3/Q4:</p> <p>To find our further information about my organisation or the nature of this particular survey you can contact GDCC's Data Protection Officer or the research team at Verian.</p> <p>Contact Details (Redacted)</p>
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3. Appendices

3.1 Appendix 1 – wave 1 to wave 9 weights

3.1.1 Wave 1 and 2 weights

At waves 1 and 2, data were weighted on 4 fundamental variables to ensure that the survey data quoted in the main survey report was representative of the population of IDBR businesses. Weights were applied to turnover interlocked with number of employees, region and sector (based on Standard Industry Classifications).

Two separate sets of data were created, each weighted on the above factors. One of these was based on all businesses; the other on £500,000+ SMEs/MSBs. The difference between the weighted and unweighted sample profiles is summarised in Figures 3.1 and 3.2. The data in these Figures have been rounded – as such, the sum of the sub-groups may differ slightly from the overall total figures.

As discussed earlier, the wave 1 and 2 sample structure focused on £500,000+ SMEs/MSBs, which were over-sampled as a proportion of the total. That being the case, the weights applied to the Total Businesses data set were relatively heavy and this affects the reliability of the data. This is discussed further in the following section.

Figure 3.1: Wave 1 and 2 unweighted versus weighted sample profile among the Total Business sample (number and % of total)

Company size	Wave 1 Unweighted	Wave 1 Weighted	Wave 2 Unweighted	Wave 2 Weighted
£500,000+ SME with 1 to 4 employees	174 (12%)	61 (4%)	202 (14%)	69 (5%)
£500,000+ SME with 5 to 9 employees	185 (13%)	67 (5%)	158 (11%)	67 (5%)
£500,000+ SME with 10 to 49 employees	460 (33%)	120 (9%)	461 (33%)	119 (8%)
£500,000+ SME with 50 to 99 employees	96 (7%)	15 (1%)	77 (5%)	15 (1%)
£500,000+ SME with 100 to 249 employees	49 (3%)	6 (0%)	50 (4%)	6 (0%)
MSB with 1 or more employees	196 (14%)	8 (1%)	191 (13%)	9 (1%)
All other businesses on IDBR frame (No employees OR those with a turnover below £500k but above the threshold of the IDBR OR those with a turnover £500m+)	245 (17%)	1128 (80%)	279 (20%)	1134 (80%)
Region	Wave 1 Unweighted	Wave 1 Weighted	Wave 2 Unweighted	Wave 2 Weighted
North	251 (18%)	266 (19%)	263 (19%)	268 (19%)
Midlands	369 (26%)	344 (24%)	341 (24%)	347 (24%)
South	551 (39%)	611 (43%)	632 (45%)	619 (44%)
Scotland	95 (7%)	92 (7%)	81 (6%)	92 (6%)
Wales	72 (5%)	49 (3%)	48 (3%)	49 (3%)
Northern Ireland	67 (5%)	43 (3%)	53 (4%)	42 (3%)
Sector (based on SICs)	Wave 1 Unweighted	Wave 1 Weighted	Wave 2 Unweighted	Wave 2 Weighted
Manufacturing	232 (17%)	198 (14%)	235 (17%)	197 (14%)
Infrastructure	202 (14%)	259 (18%)	188 (13%)	268 (19%)
Distribution	428 (30%)	406 (29%)	420 (30%)	399 (28%)
Finance, Professional, Technical and Creative	252 (18%)	295 (21%)	289 (20%)	303 (21%)
Other	291 (21%)	247 (18%)	286 (20%)	251 (18%)
Overall Total	1,405	1,405	1,418	1,418

Figure 3.2: Wave 1 and 2 unweighted versus weighted sample profile among the £500,000+ SMEs/MSBs sample

Company size	Wave 1 Unweighted	Wave 1 Weighted	Wave 2 Unweighted	Wave 2 Weighted
£500,000+ SME with 1 to 4 employees	174 (15%)	256 (22%)	202 (18%)	279 (24%)
£500,000+ SME with 5 to 9 employees	185 (16%)	280 (24%)	158 (14%)	267 (23%)
£500,000+ SME with 10 to 49 employees	460 (40%)	503 (43%)	461 (40%)	477 (42%)
£500,000+ SME with 50 to 99 employees	96 (8%)	61 (5%)	77 (7%)	58 (5%)
£500,000+ SME with 100 to 249 employees	49 (4%)	25 (2%)	50 (4%)	24 (2%)
MSB with 1 or more employees	196 (17%)	34 (3%)	191 (17%)	34 (3%)
All other businesses on IDBR frame (No employees OR those with a turnover below £500k but above the threshold of the IDBR OR those with a turnover £500m+)	n/a	n/a	n/a	n/a
Region	Wave 1 Unweighted	Wave 1 Weighted	Wave 2 Unweighted	Wave 2 Weighted
North	213 (18%)	229 (20%)	201 (18%)	224 (20%)
Midlands	309 (27%)	289 (25%)	285 (25%)	284 (25%)
South	448 (39%)	490 (42%)	500 (44%)	484 (42%)
Scotland	78 (7%)	78 (7%)	71 (6%)	76 (7%)
Wales	56 (5%)	41 (4%)	38 (3%)	40 (4%)
Northern Ireland	56 (5%)	33 (3%)	44 (4%)	32 (3%)
Sector (based on SICs)	Wave 1 Unweighted	Wave 1 Weighted	Wave 2 Unweighted	Wave 2 Weighted
Manufacturing	203 (18%)	164 (14%)	196 (17%)	159 (14%)
Infrastructure	168 (14%)	198 (17%)	152 (13%)	201 (18%)
Distribution	356 (31%)	353 (30%)	338 (30%)	342 (30%)
Finance, Professional, Technical and Creative	210 (18%)	209 (18%)	225 (20%)	207 (18%)
Other	223 (19%)	236 (20%)	228 (20%)	229 (20%)
Overall Total	1,160	1,160	1,139	1,139

3.1.2 Wave 3, 4, 5, 6, 7, 8 and 9 weights

The main difference between the wave 3 to 9 weights and those used in waves 1 and 2 is that the total population weights in the later waves are more granular when it comes to adjusting the profile of companies with a turnover of less than £500,000 (with additional controls on very small companies with only 0 to 2 employees). This means that trends among the total business population may have been affected (with data from waves 3 to 9 being more accurate). The total business population weights were applied to turnover interlocked with number of employees, region and sector (based on Standard Industry Classifications). The £500,000+ sample weights were applied to the following variables³⁸:

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

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

³⁸ Due to low cell accounts across some of the interlocking cells it is sometimes necessary to condense some of the target cells and so these can vary slightly from wave to wave. For example, in wave 8 region was not interlocked with turnover or number of employees at all and in wave 9 region was only interlocked with number of employees. Unweighted and weighted profiles for all waves are still provided across the full breakdown of firmographic information, even if weighting targets have not specifically been applied to all of these individual cells.

Figure 3.3: Wave 3 to 9 unweighted (unwtd) versus weighted (wtd) sample profile among the Total Business sample

Company size		W3	W4	W5	W6	W7	W8	W9
Less than £500,000 turnover with 0 to 2 employees	Unwtd	250 (8%)	288 (10%)	247 (8%)	305 (10%)	395 (13%)	506 (17%)	503 (17%)
	Wtd	1887 (63%)	1848 (62%)	1828 (61%)	1822 (61%)	1776 (59%)	1742 (58%)	1704 (57%)
Less than £500,000 turnover with 3 to 9 employees	Unwtd	169 (6%)	223 (7%)	168 (6%)	187 (6%)	173 (6%)	271 (9%)	256 (9%)
	Wtd	437 (15%)	458 (15%)	442 (15%)	448 (15%)	484 (16%)	454 (15%)	428 (14%)
Less than £500,000 turnover with 10+ employees	Unwtd	37 (1%)	41 (1%)	29 (1%)	25 (1%)	28 (1%)	46 (2%)	28 (1%)
	Wtd	63 (2%)	65 (2%)	60 (2%)	62 (2%)	63 (2%)	68 (2%)	58 (2%)
£500,000 to £499,999,999 turnover with 0 to 19 employees	Unwtd	1340 (45%)	1199 (40%)	1394 (46%)	1324 (44%)	1412 (47%)	1474 (49%)	1444 (49%)
	Wtd	449 (15%)	466 (16%)	503 (17%)	502 (17%)	512 (17%)	567 (19%)	608 (20%)
£500,000 to £499,999,999 turnover with 20 to 49 employees	Unwtd	527 (18%)	572 (19%)	565 (19%)	364 (12%)	393 (13%)	312 (10%)	400 (13%)
	Wtd	99 (3%)	102 (3%)	103 (3%)	103 (3%)	103 (3%)	107 (4%)	110 (4%)
£500,000 to £499,999,999 turnover with 50 to 249 employees	Unwtd	507 (17%)	530 (18%)	499 (17%)	638 (21%)	453 (15%)	296 (10%)	251 (8%)
	Wtd	48 (2%)	51 (2%)	53 (2%)	53 (2%)	52 (2%)	54 (2%)	55 (2%)
£500,000 to £499,999,999 turnover with 250+ employees OR £500m+ turnover	Unwtd	161 (5%)	147 (5%)	99 (3%)	159 (5%)	147 (5%)	99 (3%)	87 (3%)
	Wtd	12 (0%)	11 (0%)	12 (0%)	12 (0%)	11 (0%)	12 (0%)	13 (0%)

Region		W3	W4	W5	W6	W7	W8	W9
North	Unwtd	544 (18%)	496 (17%)	534 (18%)	493 (16%)	481 (16%)	492 (16%)	489 (16%)
	Wtd	559 (19%)	562 (19%)	550 (18%)	549 (18%)	555 (19%)	569 (19%)	557 (19%)
Midlands	Unwtd	771 (26%)	740 (25%)	773 (26%)	738 (25%)	747 (25%)	728 (24%)	749 (25%)
	Wtd	745 (25%)	731 (24%)	732 (24%)	733 (24%)	770 (26%)	738 (25%)	732 (25%)
South	Unwtd	1268 (42%)	1164 (39%)	1085 (36%)	1153 (38%)	1141 (38%)	1168 (39%)	1155 (39%)
	Wtd	1280 (43%)	1294 (43%)	1309 (44%)	1308 (44%)	1261 (42%)	1286 (43%)	1278 (43%)
Scotland	Unwtd	202 (7%)	200 (7%)	201 (7%)	206 (7%)	213 (7%)	209 (7%)	203 (7%)
	Wtd	200 (7%)	199 (7%)	198 (7%)	195 (7%)	188 (6%)	193 (6%)	190 (6%)
Wales	Unwtd	99 (3%)	200 (7%)	202 (7%)	206 (7%)	209 (7%)	201 (7%)	199 (7%)
	Wtd	117 (4%)	121 (4%)	118 (4%)	123 (4%)	129 (4%)	121 (4%)	119 (4%)
Northern Ireland	Unwtd	107 (4%)	200 (7%)	206 (7%)	206 (7%)	210 (7%)	206 (7%)	174 (6%)
	Wtd	90 (3%)	93 (3%)	94 (3%)	94 (3%)	99 (3%)	97 (3%)	98 (3%)
Sector (based on SICs)		W3	W4	W5	W6	W7	W8	W9
Manufacturing	Unwtd	519 (17%)	547 (18%)	575 (19%)	561 (19%)	548 (18%)	471 (16%)	508 (17%)
	Wtd	365 (12%)	367 (12%)	363 (12%)	363 (12%)	375 (13%)	373 (12%)	362 (12%)
Infrastructure	Unwtd	387 (13%)	396 (13%)	406 (14%)	473 (16%)	452 (15%)	463 (15%)	453 (15%)
	Wtd	544 (18%)	540 (18%)	558 (19%)	574 (19%)	574 (19%)	630 (21%)	618 (21%)
Distribution	Unwtd	915 (31%)	977 (33%)	988 (33%)	991 (33%)	942 (31%)	937 (31%)	868 (29%)
	Wtd	652 (22%)	690 (23%)	692 (23%)	713 (24%)	750 (25%)	721 (24%)	705 (24%)
Finance, Professional, Technical and Creative	Unwtd	630 (21%)	569 (19%)	511 (17%)	513 (17%)	592 (20%)	624 (21%)	602 (20%)
	Wtd	954 (32%)	938 (31%)	923 (31%)	889 (30%)	842 (28%)	793 (26%)	796 (27%)
Other	Unwtd	540 (18%)	511 (17%)	521 (17%)	464 (15%)	467 (16%)	509 (17%)	538 (18%)
	Wtd	476 (16%)	465 (16%)	465 (16%)	464 (16%)	460 (15%)	487 (16%)	495 (17%)
Overall Total	Unwtd	2,991	3,000	3,001	3,001	3,002	3,004	2,969
	Wtd	2,991	3,000	3,001	3,001	3,002	3,001	2,975

Figure 3.4: Wave 3 to 9 unweighted (unwtd) versus weighted (wtd) £500,000+ sample profile

Region interlocked with turnover and number of employees		W3	W4	W5	W6	W7	W8	W9
North with £500,000+ turnover and 20 to 49 employees	Unwtd	99 (4%)	81 (3%)	108 (4%)	73 (3%)	58 (2%)	51 (2%)	62 (3%)
	Wtd	89 (4%)	86 (4%)	85 (3%)	83 (3%)	82 (3%)	76 (4%)	70 (3%)
North with £500,000+ turnover and 50 to 249 employees	Unwtd	118 (5%)	110 (4%)	111 (4%)	128 (5%)	95 (4%)	58 (3%)	35 (2%)
	Wtd	46 (2%)	43 (2%)	44 (2%)	42 (2%)	40 (2%)	32 (2%)	27 (1%)
North - All other with £500,000+ turnover	Unwtd	255 (10%)	202 (8%)	248 (10%)	202 (8%)	228 (9%)	254 (12%)	262 (12%)
	Wtd	360 (14%)	347 (14%)	366 (14%)	353 (14%)	347 (14%)	326 (15%)	333 (15%)
Midlands with £500,000+ turnover and 20 to 49 employees	Unwtd	139 (5%)	148 (6%)	131 (5%)	82 (3%)	86 (4%)	57 (3%)	115 (5%)
	Wtd	104 (4%)	100 (4%)	99 (4%)	95 (4%)	80 (3%)	55 (3%)	85 (4%)
Midlands with £500,000+ turnover and 50 to 249 employees	Unwtd	140 (6%)	119 (5%)	137 (5%)	189 (8%)	114 (5%)	94 (4%)	76 (3%)
	Wtd	51 (2%)	49 (2%)	50 (2%)	49 (2%)	44 (2%)	63 (3%)	29 (1%)
Midlands - All other with £500,000+ turnover	Unwtd	386 (15%)	331 (14%)	401 (16%)	351 (14%)	384 (16%)	374 (17%)	354 (16%)
	Wtd	492 (19%)	468 (19%)	501 (20%)	491 (20%)	462 (19%)	425 (20%)	429 (20%)
South with £500,000+ turnover and 20 to 49 employees	Unwtd	225 (9%)	222 (9%)	208 (8%)	121 (5%)	128 (5%)	107 (5%)	145 (7%)
	Wtd	160 (6%)	155 (6%)	156 (6%)	151 (6%)	141 (6%)	126 (6%)	123 (6%)
South with £500,000+ turnover and 50 to 249 employees	Unwtd	187 (7%)	229 (9%)	175 (7%)	220 (9%)	171 (7%)	113 (5%)	96 (4%)
	Wtd	81 (3%)	79 (3%)	81 (3%)	79 (3%)	75 (3%)	59 (3%)	63 (3%)
South - All other with £500,000+ turnover	Unwtd	655 (26%)	517 (21%)	532 (21%)	600 (24%)	604 (25%)	601 (28%)	592 (27%)
	Wtd	834 (33%)	812 (33%)	852 (33%)	828 (33%)	815 (34%)	742 (34%)	745 (34%)
Scotland with £500,000+ turnover and 20 to 49 employees	Unwtd	30 (1%)	41 (2%)	36 (1%)	26 (1%)	39 (2%)	46 (2%)	30 (1%)
	Wtd	28 (1%)	27 (1%)	27 (1%)	26 (1%)	29 (1%)	30 (1%)	22 (1%)
Scotland with £500,000+ turnover and 50 to 249 employees	Unwtd	33 (1%)	30 (1%)	32 (1%)	40 (2%)	26 (1%)	12 (1%)	15 (1%)
	Wtd	15 (1%)	14 (1%)	14 (1%)	14 (1%)	12 (1%)	4 (0%)	8 (0%)
Scotland - All other with £500,000+ turnover	Unwtd	104 (4%)	102 (4%)	106 (4%)	110 (4%)	115 (5%)	113 (5%)	106 (5%)

	Wtd	119 (5%)	114 (5%)	119 (5%)	115 (5%)	113 (5%)	101 (5%)	105 (5%)
Wales with £500,000+ turnover and 20 to 49 employees	Unwtd	17 (1%)	44 (2%)	51 (2%)	27 (1%)	45 (2%)	27 (1%)	29 (1%)
	Wtd	15 (1%)	15 (1%)	15 (1%)	15 (1%)	20 (1%)	14 (1%)	13 (1%)
Wales with £500,000+ turnover and 50 to 249 employees	Unwtd	20 (1%)	28 (1%)	28 (1%)	40 (2%)	31 (1%)	11 (1%)	13 (1%)
	Wtd	8 (0%)	7 (0%)	7 (0%)	7 (0%)	7 (0%)	3 (0%)	3 (0%)
Wales - All other with £500,000+ turnover	Unwtd	43 (2%)	95 (4%)	91 (4%)	103 (4%)	95 (4%)	100 (5%)	116 (5%)
	Wtd	63 (2%)	60 (2%)	65 (3%)	63 (3%)	62 (3%)	59 (3%)	60 (3%)
Northern Ireland with £500,000+ turnover and 20 to 49 employees	Unwtd	17 (1%)	36 (1%)	31 (1%)	36 (1%)	38 (2%)	25 (1%)	20 (1%)
	Wtd	13 (1%)	12 (0%)	11 (0%)	11 (1%)	14 (1%)	9 (0%)	8 (0%)
Northern Ireland with £500,000+ turnover and 50 to 249 employees	Unwtd	12 (0%)	17 (1%)	18 (1%)	26 (1%)	19 (1%)	16 (1%)	19 (1%)
	Wtd	5 (0%)	6 (0%)	6 (0%)	6 (0%)	7 (0%)	3 (0%)	5 (0%)
Northern Ireland – All other with £500,000+ turnover	Unwtd	55 (2%)	96 (4%)	113 (4%)	111 (4%)	129 (5%)	122 (6%)	97 (4%)
	Wtd	53 (2%)	52 (2%)	58 (2%)	55 (2%)	56 (2%)	53 (2%)	53 (2%)

Sector interlocked with turnover and number of employees		W3	W4	W5	W6	W7	W8	W9
Manufacturing with £500,000+ turnover and 20 to 49 employees	Unwtd	93 (4%)	117 (5%)	114 (4%)	78 (3%)	82 (3%)	51 (2%)	105 (5%)
	Wtd	63 (2%)	59 (2%)	58 (2%)	56 (2%)	57 (2%)	45 (2%)	57 (3%)
Manufacturing with £500,000+ turnover and 50 to 249 employees	Unwtd	126 (5%)	127 (5%)	127 (5%)	194 (8%)	125 (5%)	76 (3%)	49 (2%)
	Wtd	41 (2%)	39 (2%)	39 (2%)	38 (2%)	36 (2%)	30 (1%)	12 (1%)
Manufacturing - All other with £500,000+ turnover	Unwtd	243 (10%)	218 (9%)	266 (10%)	229 (9%)	259 (11%)	232 (11%)	255 (12%)
	Wtd	228 (9%)	216 (9%)	232 (9%)	225 (9%)	216 (9%)	193 (9%)	201 (9%)
Infrastructure with £500,000+ turnover and 20 to 49 employees	Unwtd	66 (3%)	57 (2%)	73 (3%)	54 (2%)	63 (3%)	49 (2%)	65 (3%)
	Wtd	51 (2%)	50 (2%)	49 (2%)	47 (2%)	47 (2%)	44 (2%)	40 (2%)
Infrastructure with £500,000 turnover and 50 to 249 employees	Unwtd	51 (2%)	61 (2%)	60 (2%)	106 (4%)	68 (3%)	53 (2%)	44 (2%)
	Wtd	23 (1%)	23 (1%)	23 (1%)	22 (1%)	22 (1%)	36 (2%)	15 (1%)
Infrastructure - All other with £50,000+ turnover	Unwtd	227 (9%)	222 (9%)	222 (9%)	246 (10%)	247 (10%)	261 (12%)	240 (11%)
	Wtd	388 (15%)	383 (16%)	414 (16%)	404 (16%)	395 (16%)	347 (16%)	375 (17%)
Distribution with £500,000+ turnover and 20 to 49 employees	Unwtd	145 (6%)	175 (7%)	186 (7%)	135 (5%)	116 (5%)	110 (5%)	94 (4%)
	Wtd	122 (5%)	118 (5%)	118 (5%)	114 (5%)	108 (5%)	93 (4%)	89 (4%)
Distribution with £500,000+ turnover and 50 to 249 employees	Unwtd	134 (5%)	163 (7%)	125 (5%)	168 (7%)	147 (6%)	103 (5%)	78 (4%)
	Wtd	48 (2%)	48 (2%)	48 (2%)	46 (2%)	49 (2%)	36 (2%)	39 (2%)
Distribution - All other with £500,000+ turnover	Unwtd	491 (19%)	460 (19%)	526 (21%)	538 (22%)	531 (22%)	508 (23%)	479 (22%)
	Wtd	570 (22%)	542 (22%)	565 (22%)	546 (22%)	544 (23%)	495 (23%)	496 (23%)
Financial services with £500,000+ turnover and 20 to 49 employees	Unwtd	103 (4%)	100 (4%)	85 (3%)	46 (2%)	58 (2%)	49 (2%)	50 (2%)
	Wtd	76 (3%)	75 (3%)	77 (3%)	75 (3%)	74 (3%)	66 (3%)	69 (3%)
Financial services with £500,000+ turnover and 50 to 249 employees	Unwtd	85 (3%)	82 (3%)	69 (3%)	61 (2%)	57 (2%)	35 (2%)	30 (1%)
	Wtd	41 (2%)	40 (2%)	42 (2%)	41 (2%)	34 (1%)	26 (1%)	25 (1%)
Financial services - All other with £500,000+ turnover	Unwtd	305 (12%)	236 (10%)	239 (9%)	240 (10%)	288 (12%)	279 (13%)	284 (13%)
	Wtd	350 (14%)	342 (14%)	362 (14%)	353 (14%)	349 (15%)	319 (15%)	319 (15%)

Other with £500,000+ turnover and 20 to 49 employees	Unwtd	120 (5%)	123 (5%)	107 (4%)	52 (2%)	75 (3%)	54 (2%)	87 (4%)
	Wtd	99 (4%)	93 (4%)	92 (4%)	90 (4%)	79 (3%)	63 (3%)	68 (3%)
Other with £500,000+ turnover and 50 to 249 employees	Unwtd	114 (4%)	100 (4%)	120 (5%)	114 (5%)	59 (2%)	37 (2%)	53 (2%)
	Wtd	53 (2%)	50 (2%)	51 (2%)	50 (2%)	44 (2%)	36 (2%)	43 (2%)
Other - All other with £500,000+ turnover	Unwtd	232 (9%)	207 (8%)	238 (9%)	224 (9%)	230 (10%)	284 (13%)	269 (12%)
	Wtd	385 (15%)	370 (15%)	388 (15%)	377 (15%)	351 (15%)	352 (16%)	335 (15%)

Turnover interlocked with number of employees		W3	W4	W5	W6	W7	W8	W9
£500,000 to £24,999,999 turnover with 0 to 4 employees	Unwtd	594 (23%)	491 (20%)	572 (22%)	549 (22%)	610 (25%)	525 (24%)	377 (17%)
	Wtd	631 (25%)	634 (26%)	695 (27%)	689 (28%)	685 (29%)	664 (30%)	710 (33%)
£500,000 to £24,999,999 turnover with 5 to 9 employees	Unwtd	208 (8%)	171 (7%)	200 (8%)	196 (8%)	232 (10%)	485 (22%)	516 (24%)
	Wtd	611 (24%)	588 (24%)	623 (24%)	600 (24%)	574 (24%)	532 (24%)	522 (24%)
£500,000 to £24,999,999 turnover with 10 to 19 employees	Unwtd	477 (19%)	469 (19%)	569 (22%)	483 (19%)	497 (21%)	393 (18%)	454 (21%)
	Wtd	624 (25%)	576 (24%)	586 (23%)	559 (23%)	535 (22%)	465 (21%)	447 (21%)
£500,000 to £24,999,999 turnover with 20 to 49 employees	Unwtd	451 (18%)	512 (21%)	495 (19%)	272 (11%)	307 (13%)	240 (11%)	333 (15%)
	Wtd	401 (16%)	388 (16%)	385 (15%)	374 (15%)	346 (14%)	304 (14%)	315 (14%)
£500,000 to £24,999,999 turnover with 50 to 99 employees	Unwtd	241 (10%)	242 (10%)	223 (9%)	290 (12%)	143 (6%)	48 (2%)	64 (3%)
	Wtd	124 (5%)	121 (5%)	121 (5%)	118 (5%)	102 (4%)	65 (3%)	71 (3%)
£500,000 to £24,999,999 turnover with 100 to 249 employees	Unwtd	82 (3%)	76 (3%)	100 (4%)	79 (3%)	41 (2%)	40 (2%)	28 (1%)
	Wtd	51 (2%)	50 (2%)	49 (2%)	48 (2%)	39 (2%)	72 (3%)	34 (2%)
£25m to £499,999,999 turnover with 0 to 19 employees	Unwtd	61 (2%)	68 (3%)	53 (2%)	96 (4%)	73 (3%)	71 (3%)	97 (4%)
	Wtd	10 (0%)	11 (0%)	12 (1%)	13 (1%)	17 (1%)	17 (1%)	26 (1%)
£25m+ with 20 to 49 employees	Unwtd	76 (3%)	60 (2%)	70 (3%)	93 (4%)	87 (4%)	73 (3%)	68 (3%)
	Wtd	8 (0%)	7 (0%)	8 (0%)	8 (0%)	18 (1%)	7 (0%)	8 (0%)
£25m+ with 50 to 249 employees	Unwtd	187 (7%)	215 (9%)	178 (7%)	274 (11%)	272 (11%)	216 (10%)	162 (7%)
	Wtd	30 (1%)	29 (1%)	32 (1%)	31 (1%)	45 (2%)	27 (1%)	29 (1%)
£500m+ with fewer than 20 or 250+ employees OR £500,000+ turnover with 250+ employees	Unwtd	158 (6%)	144 (6%)	97 (4%)	153 (6%)	143 (6%)	90 (4%)	83 (4%)
	Wtd	46 (2%)	44 (2%)	45 (2%)	44 (2%)	44 (2%)	28 (1%)	21 (1%)
Overall Total	Unwtd	2,535	2,448	2,557	2,485	2,405	2,181	2,182
	Wtd	2,535	2,448	2,557	2,485	2,405	2,181	2,182

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About the Department for Business and Trade

The Department for Business and Trade is an economic growth department. We ensure fair, competitive markets at home, secure access to new markets abroad and support businesses to invest, export and grow. Our priorities are the Industrial Strategy, Make Work Pay, the Trade Strategy and the Plan for Small Business.

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