**UKRI Foundation Industries Survey**

**OMB Research / Enterprise Research Centre**

**INTRODUCTION**

**Could I please speak to a member of the senior management team, or someone else, with responsibility for the development of new products and how these are delivered?**

**Good morning/afternoon. My name is xxxx and I’m calling from OMB Research, an independent market research agency.**

**We’ve been commissioned by the University of Warwick and Enterprise Research Centre to conduct a survey among businesses in the UK’s foundation industries. We’re conducting this study to look at how businesses go about developing their products, how they deliver them and what influences these activities.**

**The results from this study will be used to inform the government on how best to improve the way they support businesses within your industry.**

**It doesn’t matter if your organisation doesn’t do any new product development, we’re still interested in your views.**

**The survey will take around 20 minutes, depending on your answers. Is it convenient to speak to you now or would you prefer to make an appointment for another time?**

ADD IF NECESSARY:

* **Participation in this survey is voluntary, although your cooperation will ensure that the views expressed are representative of all businesses in your sector.**
* **If you would like, we will also email you a summary report of our findings as a thank you for taking part once the research has been completed**
* **Your organisation was selected at random from a list purchased from a commercial sample provider.**
* **If you would like to speak to someone about the survey please contact Michael Farrer (Associate Director, OMB Research) on 01732 220582. Alternatively, if you wish to talk to someone at University of Warwick about the research please call** INSERT NAME **on** INSERT NUMBER **or** INSERT EMAIL
* **The research is being conducted under the Code of Conduct of the Market Research Society. If you would like to confirm that OMB Research is a bona fide market research agency, you can contact the Market Research Society on 0800 975 9596.**

GDPR CONSENT

**The information you provide will be used for research purposes only and will be treated in the strictest confidence. OMB Research will not disclose to University of Warwick who has taken part in the research or divulge specific details about your organisation** **unless you agree to this at the end of the survey.**

**You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice, which is on our website (**IF NECESSARY:[www.ombresearch.co.uk/privacy](http://www.ombresearch.co.uk/privacy)**).**

**All calls are recorded for training and quality purposes.**

ASK ALL

**Z1. Before I continue, can I just confirm that you are happy to participate in the survey on this basis?** SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Yes, agreed to participate in survey | 1 | CONTINUE |
| Requested more information | 2 | SEND INFO EMAIL |
| No, declined to participate | 3 | CLOSE |

SECTION A. ABOUT THE BUSINESS

ASK ALL

**I’d like to start by asking some questions about the structure of your organisation.**

ASK ALL

**A1A I have** [INSERT SECTOR DESCRIPTION FROM SAMPLE] **as a general classification of your business’ principal activity. Bearing in mind this is a general classification only, does this sound about right?**

**READ OUT. SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |

## ASK IF SECTOR DESCRIPTION NOT CORRECT (A3=1)

**A1B What is the principal activity of your business?**

PROBE FULLY. RECORD DETAILS AND CODE TO 4 DIGITS.

**AS NECESSARY:**

* **What is the main product or service of this business?**
* **What exactly is made or done at this business?**

|  |  |  |
| --- | --- | --- |
| WRITE IN | 1 |  |

## ASK ALL

**A2A In which year did your business first start trading? This includes under all ownerships and all legal statuses?**

|  |  |  |
| --- | --- | --- |
| WRITE IN (4 DIGITS STARTING 1XXX/20XX | 1 |  |
| DO NOT READ OUT: Don’t know / Refused | 2 |  |

## ASK IF DK/REF YEAR ESTABLISHED (A2A=2)

**A2A Did it first start trading…?**

**READ OUT. SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| In the last five years | 1 |  |
| 6 to 10 years ago | 2 |  |
| 11 to 20 years ago | 3 |  |
| More than 20 years ago | 4 |  |
| DO NOT READ OUT: Don’t know | 5 |  |
| DO NOT READ OUT: Refused | 6 |  |

##

## ASK ALL

**A3 Could you tell me the postcode of your business’s main UK site?**

|  |  |  |
| --- | --- | --- |
| WRITE IN | 1 |  |
| DO NOT READ OUT: Don’t know / Refused | 2 |  |

## ASK ALL

**A4 How many working owners and partners does the business have? Please include yourself if you are a working owner or partner.**

|  |  |  |
| --- | --- | --- |
| WRITE IN | 1 |  |
| DO NOT READ OUT: Don’t know / Refused | 2 |  |

## ASK ALL

**A5 How many, if any, of these are women?**

|  |  |  |
| --- | --- | --- |
| WRITE IN | 1 |  |
| DO NOT READ OUT: Don’t know / Refused | 2 |  |

## ASK ALL

**A6 Is your business a family owned business, that is one which is majority owned by members of the same family?**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| Don’t know | 3 |  |
| Refused | 4 |  |

## ASK ALL

**A7 Is the business UK or foreign-owned?**

|  |  |  |
| --- | --- | --- |
| UK-owned with no overseas operations | 1 |  |
| UK with overseas subsidiaries | 2 |  |
| Foreign-owned | 3 |  |
| Don’t know | 4 |  |
| Refused | 5 |  |

READ OUT IF FOREIGN OWNED (A7=2-3)

**For the rest of this interview, when I ask about your business I’d like you to answer just about your UK operation, so excluding any overseas sites or companies that are part of your business.**

SECTION B. FOUNDATION INDUSTRY

## ASK ALL

**B1 What proportion of your sales are to other businesses?**

AS NECESSARY: **By ‘other businesses’ we mean not to consumers.**

|  |  |  |
| --- | --- | --- |
| All of them (100%) | 1 |  |
| 80% – 99% | 2 |  |
| 60% – 79% | 3 |  |
| 40% - 59% | 4 |  |
| 20% - 39% | 5 |  |
| 1% - 19% | 6 |  |
| None of them (0%) | 7 |  |
| Don’t know | 8 |  |
| Refused | 9 |  |

## ASK ALL

**B3 Is your business mainly concerned with providing materials to other businesses lower down the supply chain or is it mainly concerned with the retail end of the supply chain**

READ OUT. SINGLE CODE

|  |  |  |
| --- | --- | --- |
| Businesses lower down the supply chain | 1 |  |
| Retail end of the supply chain | 2 |  |
| Don’t know | 3 |  |
| Refused | 4 |  |

SECTION C – EMPLOYMENT

ASK ALL

**C1A Excluding owners and partners, approximately how many employees are currently on your payroll in the UK across all sites?**

**AS NECESSARY:**

* **Include full and part time staff**
* **Include temporaries/casuals, but not agency staff**
* **Exclude self-employed**
* **Exclude owners/partners, but other directors count as employees**

|  |  |  |
| --- | --- | --- |
| ENTER NUMBER | 1 |  |
| DO NOT READ OUT: Don’t know/Refused | 2 |  |

IF DK/REF NUMBER OF EMPLOYEES (C1A=2)

**C1B Would you be able to tell me which of the following bands the number of employees falls into?**

**AS NECESSARY:**

* **Include full and part time staff**
* **Include temporaries/casuals, but not agency staff**
* **Exclude self-employed**
* **Exclude owners/partners, but other directors count as employees**

|  |  |  |
| --- | --- | --- |
| 0-9 | 1 | CLOSE |
| 10-49 | 2 |  |
| 50-249 | 3 |  |
| 250+ | 4 |  |
| DO NOT READ OUT: Don’t know | 5 |  |
| DO NOT READ OUT: Refused | 6 |  |

ASK ALL

**C2A How many employees did the business have on the payroll 12 months ago across all UK sites (still excluding owners and partners)?**

|  |  |  |
| --- | --- | --- |
| ENTER NUMBER | 1 |  |
| DO NOT READ OUT: Don’t know/Refused | 2 |  |

**ASK IF DK/REF NUMBER OF EMPLOYEES 12 MONTHS AGO (C2A=2)**

**C2B Would you say that it was…?**

|  |  |  |
| --- | --- | --- |
| More than currently | 1 |  |
| The same | 2 |  |
| Fewer | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

## ASK ALL

**C3A How many employees do you expect the business to have on the payroll in the UK in twelve months’ time (excluding owners and partners)?**

**AS NECESSARY:**

* **Include full and part time staff**
* **Include temporaries/casuals, but not agency staff**
* **Exclude self-employed**
* **Exclude owners/partners, but other directors count as employees**

|  |  |  |
| --- | --- | --- |
| ENTER NUMBER | 1 |  |
| DO NOT READ OUT: Don’t know/Refused | 2 |  |

**ASK IF DK/REF NUMBER OF EMPLOYEES IN 12 MONTHS TIME (C3A=2)**

**C3B Do you think it will be…?**

|  |  |  |
| --- | --- | --- |
| More than currently | 1 |  |
| The same | 2 |  |
| Fewer | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

SECTION D. EXPORTS AND IMPORTS

## ASK ALL

**I’d now like to ask you a few questions about your businesses export activity. By this I mean any goods or services sold by you to an individual or organisation based outside of the UK.**

## ASK ALL

**D1 In the past 12 months did your business export any SERVICES outside of the UK? This could include commissions, royalties and licences** <ADD IF IN NORTHERN IRELAND**: This includes sales to the Republic of Ireland**>**. This does not include exports of goods.**

 SINGLE CODE.

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

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

## ASK ALL

**D2 And in the past 12 months did your business export any GOODS outside of the UK?** <ADD IF IN NORTHERN IRELAND**: This includes sales to the Republic of Ireland**>**. This does not include exports of services.**

 SINGLE CODE.

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

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

## ASK IF EXPORT GOODS OR SERVICES (D1=1 OR D2=1)

**D3A What proportion of your turnover in the last 12 months was accounted for by exports?** <IF (D1=1 AND D2=1) **Please combine sales of goods and services**>

|  |  |  |
| --- | --- | --- |
| ENTER PROPORTION (0-100%) | 1 |  |
| DO NOT READ OUT: Don’t know/Refused | 2 |  |

## ASK IF DK/REF PROPORTION OF EXPORT SALES (D3A=2)

**D3B Would you say it was…?**

|  |  |  |
| --- | --- | --- |
| Up to 5% | 1 |  |
| 6% to 10% | 2 |  |
| 11% to 25% | 3 |  |
| 26% to 50% | 4 |  |
| 51% to 75% | 5 |  |
| 76% to 90% | 6 |  |
| More than 90% | 7 |  |
| DO NOT READ OUT: Don’t know | 8 |  |
| DO NOT READ OUT: Refused | 9 |  |

## ASK IF EXPORT GOODS OR SERVICES (D1=1 OR D2=1)

**D4 In the past 12 months have you exported to...**

READ OUT. CODE ALL THAT APPLY.

|  |  |  |
| --- | --- | --- |
| The European Union | 1 |  |
| The USA | 2 |  |
| EFTA Countries (AS NECESSARY: Switzerland, Iceland, Liechtenstein and Norway) | 3 |  |
| Canada | 4 |  |
| Turkey | 5 |  |
| South Korea | 6 |  |
| China | 7 |  |
| India | 8 |  |
| Other non-European Union countries | 9 |  |
| DO NOT READ OUT: Don’t know | 10 | EXCLUSIVE |
| DO NOT READ OUT: Refused | 11 | EXCLUSIVE |

## ASK ALL

**D5 And moving on to think about imports. In the past 12 months, have you directly imported goods or services from outside the UK?**

SINGLE CODE

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

## ASK IF DIRECTLY IMPORTED GOODS/SERVICES (D5=1)

**D6A Thinking about your purchased inputs, and by purchased inputs I mean everything that you buy in to the company, so basically everything except your labour costs.**

**Approximately what proportion of your business’s inputs are sourced from outside the UK?**

SINGLE CODE

|  |  |  |
| --- | --- | --- |
| ENTER PERCENTAGE (0-100%) | 1 |  |
| DO NOT READ OUT: Don’t know / Refused | 2 |  |

## ASK IF DONT KNOW PERCENTAGE OF IMPORTED INPUTS (D6A=2)

**D6B If you had to estimate this proportion, into which of the following bands would you place it? Would you say…?**

READ OUT. SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Zero/nothing | 1 |  |
| Up to 10% | 2 |  |
| 11% to 20% | 3 |  |
| 21% to 30% | 4 |  |
| More than 30% | 5 |  |
| DO NOT READ OUT: Don’t know | 6 |  |
| DO NOT READ OUT: Refused | 7 |  |

## ASK IF DIRECTLY IMPORTED GOODS/SERVICES (D5=1)

**D7 In the past 12 months, have you imported goods or services from…**

|  |  |  |
| --- | --- | --- |
| The European Union | 1 |  |
| The USA | 2 |  |
| EFTA Countries (AS NECESSARY: Switzerland, Iceland, Liechtenstein and Norway) | 3 |  |
| Canada | 4 |  |
| Turkey | 5 |  |
| South Korea | 6 |  |
| China | 7 |  |
| India | 8 |  |
| Other non-European Union countries | 9 |  |
| DO NOT READ OUT: Don’t know | 10 |  |
| DO NOT READ OUT: Refused | 11 |  |

**D8 Where do you source your ram material inputs from?**

|  |  |  |
| --- | --- | --- |
| Entirely from the UK | 1 |  |
| Over 75% from the UK, the remainder imported | 2 |  |
| Between 51 -75% from the UK, the remainder imported | 3 |  |
| Evenly split between UK and imports | 4 |  |
| Between 25%-50% from the UK and the rest imported | 5 |  |
| Less than a quarter from the UK, mostly imported | 6 |  |
| Entirely imported | 7 |  |
| Don’t know | 8 |  |

SECTION E. AMBITION

## ASK ALL

## **I’d now like to move on to talking about your business’s plans for the future.**

## ASK ALL

**E1 Firstly, do you have a formal written business plan? If so, is it kept up to date?**

READ OUT. SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Yes - it is kept up to date | 1 |  |
| Yes - but not kept up to date | 2 |  |
| No | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

## ASK ALL

**E2 Over the next three years, do you aim to grow the sales of your business?**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

## ASK IF INTEND TO GROW SALES (E2=1)

**E3A By approximately what percentage do you aim to have grown your sales in three years’ time?**

READ OUT. SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| 1 – 9% | 1 |  |
| 10% – 24% | 2 |  |
| 25% – 49% | 3 |  |
| 50% – 74%  | 4 |  |
| 75% – 99% | 5 |  |
| 100% or more | 6 |  |
| DO NOT READ OUT: Don’t know | 7 |  |
| DO NOT READ OUT: Refused | 8 |  |

ASK ALL

**E4 Does your business plan to do any of the following over the next three years?**

READ OUT. MULTICODE. RANDOMISE CODES 1 TO 8

|  |  |  |
| --- | --- | --- |
| Increase the skills of the workforce | 1 |  |
| Increase the leadership capability of managers | 2 |  |
| Capital investment (in premises, machinery, etc.) | 3 |  |
| Develop and launch new products/services | 4 |  |
| Introduce new working practices | 5 |  |
| Invest in R&D | 6 |  |
| Increase export sales or begin selling to new overseas markets | 7 |  |
| Recruitment of new staff | 8 |  |
| None of these | 9 | EXCLUSIVE |
| DO NOT READ OUT: Don’t know | 10 | EXCLUSIVE |
| DO NOT READ OUT: Refused | 11 | EXCLUSIVE |

ASK ALL

**E5 Over what time period does your business typically plan for investment in the following?**

READ OUT. RANDOMISE A TO C. SINGLE CODE FOR EACH OPTION.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | 1 year or less | 2 to 3 years | 4 to 5 years | 6 to 10 years | More than 10 years | Don’t know | Refused |
| A. Capital equipment |  |  |  |  |  |  |  |
| B. Innovation and/or R&D |  |  |  |  |  |  |  |
| C. Training |  |  |  |  |  |  |  |

## ASK ALL

**E6 And thinking specifically about your growth ambitions within the UK, which of the following best describes your current strategy? Would you say that you are…?**

|  |  |  |
| --- | --- | --- |
| Targeting substantial growth | 1 |  |
| Aiming to grow gradually | 2 |  |
| Currently stable but gearing up for growth | 3 |  |
| Currently stable and maintaining market position | 4 |  |
| Managing decline | 5 |  |
| (Something else – SPECIFY) | 6 |  |
| DO NOT READ OUT: Don’t know | 7 |  |
| DO NOT READ OUT: Refused | 8 |  |

SECTION F – OBSTACLES TO BUSINESS PERFORMANCE

## ASK ALL

## **F1 I'd now like to ask you some questions about issues, obstacles or difficulties that your business might face in achieving your business objectives.**

## **Which of the following would you say are major obstacles to the success of your business in general?**

## **READ OUT. RANDOMISE CODES 1-9 ONLY. CODES 10-11 MUST ALWAYS BE AFTER CODES 1-8. CODE ALL THAT APPLY.**

|  |  |  |
| --- | --- | --- |
| Obtaining finance | 1 |  |
| Taxation, VAT, PAYE, National Insurance, business rates | 2 |  |
| Staff recruitment and skills | 3 |  |
| Regulations/red tape | 4 |  |
| Availability/cost of suitable premises | 5 |  |
| Competition in the market | 6 |  |
| Workplace pensions | 7 |  |
| Liquidity/cashflow | 8 |  |
| Late payment | 9 |  |
| UK exit from the EU | 10 |  |
| National Living Wage | 11 |  |
| Any other major issues of obstacles? (SPECIFY) | 12 |  |
| None of these | 13 | EXCLUSIVE |
| DO NOT READ OUT: Don’t know | 14 | EXCLUSIVE |
| DO NOT READ OUT: Refused | 15 | EXCLUSIVE |

## ASK ALL

# ****F3 Which of the following do you consider to be a competitive advantage for your company?****

READ OUT. RANDOMISE CODES 1-11. CODE ALL THAT APPLY.

|  |  |  |
| --- | --- | --- |
| Quality | 1 |  |
| Price | 2 |  |
| Customer service | 3 |  |
| Delivery times | 4 |  |
| Use of technology | 5 |  |
| Productivity consistency | 6 |  |
| Product performance | 7 |  |
| Design | 8 |  |
| Customisation | 9 |  |
| Environmental credentials | 10 |  |
| DO NOT READ OUT: None of the above | 11 | EXCLUSIVE |
| DO NOT READ OUT: Don’t know | 12 | EXCLUSIVE |
| DO NOT READ OUT Refused | 13 | EXCLUSIVE |

SECTION G. ACCESS TO FINANCE

ASK ALL

**I’d now like you to think about how your business accesses finance.**

ASK ALL

## **G1 Have you tried to obtain external finance for your business in the past 12 months?**

##  **SINGLE CODE. IF YES, PROBE WHETHER TRIED TO OBTAIN EXTERNAL FINANCE ONCE OR MORE THAN ONCE IN THE LAST 12 MONTHS**

## **AS NECESSARY: This can include loans from friends and family and active rearrangement of an overdraft facility**

|  |  |  |
| --- | --- | --- |
| Yes – once | 1 |  |
| Yes – more than once | 2 |  |
| No | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

ASK ALL TRYING TO OBTAIN EXTERNAL FINANCE (G1=1-2)

## **G2 And were you successful in obtaining…?**

##  **SINGLE CODE**

|  |  |  |
| --- | --- | --- |
| All of the finance you applied for | 1 |  |
| Some of it | 2 |  |
| None | 3 |  |
| (Decision is pending) | 4 |  |
| DO NOT READ OUT: Don’t know | 5 |  |
| DO NOT READ OUT: Refused | 6 |  |

ASK ALL TRYING TO OBTAIN EXTERNAL FINANCE (G1=1-2)

## **G3 What did you try to obtain this finance for? Was it for…?**

##  **SINGLE CODE. RANDOMISE STATEMENTS A TO G.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Yes | No | Don’t know | Refused |
| A. Working capital / cashflow |  |  |  |  |
| B. Acquisition of capital equipment / vehicles |  |  |  |  |
| C. Buildings |  |  |  |  |
| D. Investment in new processes |  |  |  |  |
| E. Investment in new goods/services |  |  |  |  |
| F. Marketing |  |  |  |  |
| G. Staff training |  |  |  |  |

H. INNOVATION

ask all

**I’d now like you to think about innovation within your business.**

ask all

## **H1 Has your business introduced any new or significantly improved goods or services in the last three years? This excludes the resale of goods purchased from other businesses, or changes of a solely aesthetic nature.**

## **SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

Ask IF INTRODUCED NEW/SIG. IMPROVED GOODS OR SERVICES (H1=1)

## **H2 Were any of these new or significantly improved goods and services innovations new to the market, or were they all just new to your business?**

## **SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| At least some new to the market | 1 |  |
| All just new to the business | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

ask all

## **H3 Has your business introduced any new or significantly improved processes for producing or supplying goods or services in the last three years?**

## **SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

Ask IF INTRODUCED NEW/SIG. IMPROVED PROCESSES (H3=1)

## **H4 Were any of these new or significantly improved processes new to your industry, or were they all just new to your business?**

## **SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| At least some new to the industry | 1 |  |
| All just new to the business | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

**ASK IF INTRODUCED NEW/SIG IMPROVED PRODUCTS OR PROCESSES (H1=1 OR H3=1)**

**H5 During the last three years, what were the most important factors in your decision to innovate?**

 **DO NOT READ OUT. CODE ALL THAT APPLY.**

|  |  |  |
| --- | --- | --- |
| Increasing range of goods/services | 1 |  |
| Entering new markets | 2 |  |
| Increasing market share | 3 |  |
| Improving quality of goods/services | 4 |  |
| Improving flexibility for producing goods/services | 5 |  |
| Improving capacity for producing goods/services | 6 |  |
| Increasing value added | 7 |  |
| Reducing costs per unit produced or provided | 8 |  |
| Improving health and safety | 9 |  |
| Reducing environmental impacts | 10 |  |
| Replacing outdated products or processes | 11 |  |
| Reducing energy use/costs | 12 |  |
| Meeting regulatory requirements (including standards) | 13 |  |
| Limited opportunities to pilot to develop due to continuous product processes | 14 |  |
| Other (SPECIFY) | 15 |  |
| DO NOT READ OUT: Don’t know | 16 |  |
| DO NOT READ OUT: Refused | 17 |  |

**ASK IF MORE THAN ONE SELECTED AT H5**

**H6A Of these, which was the most important factor in your decision to innovate?**

**ASK IF ENERGY MENTIONED AT H6A (H6A=X)**

**H6B In the past three years have you invested in new technologies or processes to improve energy and resource efficiency in your company?**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

**ASK IF HAVE INVESTED IN NEW ENERGY TECH/PROCESSES (H6B=1)**

**H6C And to what extent do you see further opportunities to improve energy and resource efficiency within your businesses?**

 **Please answer on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree.**

 **So firstly…**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | 1 – Strongly disagree | 2 | 3 | 4 | 5 – Strongly agree | (Don’t Know) |
| \_1 | We have done all we can with existing technology  | 1 | 2 | 3 | 4 | 5 | 6 |
| \_2 | We have made the investments we can with the cash available | 1 | 2 | 3 | 4 | 5 | 6 |
| \_3 | We know there is technology that would allow us to do more, but it is too expensive | 1 | 2 | 3 | 4 | 5 | 6 |
| \_4 | We know there is technology that would allow us to do, but it is not proven in the UK | 1 | 2 | 3 | 4 | 5 | 6 |

**ASK IF NO INNOVATION CONDUCTED (H1<>1 AND H3<>1)**

**H8 Over the past three years, which of the following factors acted as a constraint to innovation activities?**

 **READ OUT. CODE ALL THAT APPLY.**

|  |  |  |
| --- | --- | --- |
| Excessive perceived economic risks | 1 |  |
| Direct innovation costs too high | 2 |  |
| Cost of finance | 3 |  |
| Availability of finance | 4 |  |
| Lack of qualified personnel | 5 |  |
| Lack of information on technology | 6 |  |
| Lack of information on markets | 7 |  |
| Market dominated by established businesses | 8 |  |
| Uncertain demand for innovative goods/services | 9 |  |
| UK government regulations | 10 |  |
| EU regulations (including standards) | 11 |  |
| Uncertainty around the UK’s exit from the EU | 12 |  |
| Limited opportunities to pilot or develop due to continuous production process | 13 |  |
| No need due to previous innovation | 14 |  |
| No need due to market conditions | 15 |  |
| Other (SPECIFY) | 16 |  |
| None of these | 17 | EXCLUSIVE |
| DO NOT READ OUT: Don’t know | 18 | EXCLUSIVE |
| DO NOT READ OUT: Refused | 19 | EXCLUSIVE |

**ASK IF MORE THAN ONE CONSTRAINT SELECTED AT H8**

**H9 Of these, which was the most important factor in your decision not to innovate?**

 **SINGLE CODE. CATI TO DISPLAY CODES SELECTED AT H8**

|  |  |  |
| --- | --- | --- |
| Excessive perceived economic risks | 1 |  |
| Direct innovation costs too high | 2 |  |
| Cost of finance | 3 |  |
| Availability of finance | 4 |  |
| Lack of qualified personnel | 5 |  |
| Lack of information on technology | 6 |  |
| Lack of information on markets | 7 |  |
| Market dominated by established businesses | 8 |  |
| Uncertain demand for innovative goods/services | 9 |  |
| UK government regulations | 10 |  |
| EU regulations (including standards) | 11 |  |
| Uncertainty around the UK’s exit from the EU | 12 |  |
| Limited opportunities to pilot or develop due to continuous production process | 13 |  |
| No need due to previous innovation | 14 |  |
| No need due to market conditions | 15 |  |
| <INSERT “Other (SPECIFY)” FROM H8> | 16 |  |
| None of these | 17 | EXCLUSIVE |
| DO NOT READ OUT: Don’t know | 18 | EXCLUSIVE |
| DO NOT READ OUT: Refused | 19 | EXCLUSIVE |

ASK ALL

## **H10 In the past three years, has your business collaborated with other businesses in the supply chain to develop new products, services or processes?**

##  **SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Yes - Often | 1 |  |
| Yes - Sometimes | 2 |  |
| No - Never | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

ASK ALL

## **H11 In the past three years, has your business collaborated with organisations outside of the supply chain to develop new products, services or processes?**

## **SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Yes - Often | 1 |  |
| Yes - Sometimes | 2 |  |
| No - Never | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

ASK IF ANY COLLABORATION (H10=1 OR H11=1)

## **H12 And who <IF (H10=1 & H11<>1) in your supply chain / IF (H10<>1 & H11=1) outside of your supply chain> did you collaborate with <IF (H10=1 & H11=1) both within and outside of your supply chain>?**

## **do not read out. code all that apply.**

|  |  |  |
| --- | --- | --- |
| Customers | 1 |  |
| Universities | 2 |  |
| Other company in your supply chain | 3 |  |
| KTP (Knowledge Transfer Partnership) | 4 |  |
| Catapult (The Catapult Network) | 5 |  |
| Other (SPECIFY) | 6 |  |
| DO NOT READ OUT: Don’t know | 7 |  |
| DO NOT READ OUT: Refused | 8 |  |

ASK IF ANY COLLABORATION (H10=1 OR H11=1)

## **H13 And which of the following did this collaboration involve?**

## **read out. code all that apply.**

|  |  |  |
| --- | --- | --- |
| Product design | 1 |  |
| New technology adoption | 2 |  |
| Production process improvements | 3 |  |
| Improving energy or resource efficiency | 4 |  |
| Forecasting demand | 5 |  |
| Lean adoption | 6 |  |
| New business models | 7 |  |
| Customising products or services for customers | 8 |  |
| Anything else? (SPECIFY) | 9 |  |
| DO NOT READ OUT: Don’t know | 10 |  |
| DO NOT READ OUT: Refused | 11 |  |

ASK ALL

## **H14 Who is involved in the decision making process on innovation in your business?**

## **read out. code all that apply.**

|  |  |  |
| --- | --- | --- |
| Senior managers | 1 |  |
| Production employees | 2 |  |
| R&D department | 3 |  |
| Consultants | 4 |  |
| Another company in the group | 5 |  |
| Other (SPECIFY) | 6 |  |
| DO NOT READ OUT: Don’t know | 7 |  |
| DO NOT READ OUT: Refused | 8 |  |

ASK ALL

## **H15A Is your business a member of a trade organisation or representative body?**

## **read out. code all that apply.**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

ASK IF MEMBER OF TRADE/REP BODY (H15A=1)

## **H15B Does this organisation actively encourage and support innovation within your sector?**

## **read out. code all that apply.**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

SECTION I. BUSINESS SUPPORT

ASK ALL

**I1 In the last 12 months have you sought external advice or information on matters affecting your business? We are only interested when this has been more than a casual conversation.**

 SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

**ASK IF SOUGHT EXTERNAL ADVICE/INFORMATION (I1=1)**

**I2 Was the advice or support you sought concerned with innovation?**

 SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |
| DO NOT READ OUT: Refused | 4 |  |

**ASK IF ADVICE WAS IN RELATION TO INNOVATION (I2=1)**

**I4 What was the outcome of the advice sought?**

READ OUT. **CODE ALL THAT APPLY.**

|  |  |  |
| --- | --- | --- |
| Innovated more quickly | 1 |  |
| Secured finance | 2 |  |
| Identified partners | 3 |  |
| Overcame technical issues | 4 |  |
| Identified additional commercial opportunities | 5 |  |
| Other (SPECIFY) | 7 |  |
| DO NOT READ OUT: Don’t know | 8 |  |
| DO NOT READ OUT: Refused | 9 |  |

**ASK ALL**

**I3 In the last three years, have you applied for or received R&D tax credits, innovation loans or other innovation support e.g. through Framework programmes?**

 SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |
| DO NOT READ OUT: Don’t know | 3 |  |

SECTION J. MANAGEMENT CAPABILITY

ASK ALL

**J1 Looking at your sector as a whole, to what extent would you agree that innovation is constrained by poorly developed management and leadership skills? Would you say…?**

READ OUT. RANDOMISE ORDER. SINGLE CODE PER ROW.

|  |  |  |
| --- | --- | --- |
| Frequently | 1 |  |
| Sometimes | 2 |  |
| Seldom | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

ASK ALL

**J2 How often is the business’s innovation strategy discussed at board level?**

READ OUT. RANDOMISE ORDER. SINGLE CODE PER ROW.

|  |  |  |
| --- | --- | --- |
| Quarterly | 1 |  |
| Annually | 2 |  |
| Less frequently / Ad hoc | 3 |  |
| Never |  |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

K. TURNOVER

# ASK ALL

**K1A Can you please tell me the turnover of your business in the past 12 months?**

## RECORD NUMBER.

## AS NECESSARY: **If you have more than one site please provide the figure across all UK sites**

|  |  |  |
| --- | --- | --- |
| ENTER NUMBER (£) | 1 |  |
| DO NOT READ OUT: Don’t know/refused | 2 |  |

# IF DK/REF TURNOVER (K1A=2)

**K1B Do you know the approximate turnover of your business in the last 12 months. Is it…?**

**READ OUT UNTIL ANSWER GIVEN. SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Less than £85,000 | 1 |  |
| £85,000 - £99,999 | 2 |  |
| £100,000 - £249,999 | 3 |  |
| £250,000 - £499,999 | 4 |  |
| £500,000 - £999,999 | 5 |  |
| £1m – £1.99m | 6 |  |
| £2m - £2.8m | 7 |  |
| £2.81m - £4.99m | 8 |  |
| £5m - £9.99m | 9 |  |
| £10m - £14.99m | 10 |  |
| £15m - £24.99m | 11 |  |
| £25m or more | 12 |  |
| DO NOT READ OUT: Don’t know | 13 |  |
| DO NOT READ OUT: Refused | 14 |  |

# ASK ALL

**K2 Compared with the previous 12 months, has your turnover increased, decreased or stayed roughly the same?**

**SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Increased | 1 |  |
| Decreased | 2 |  |
| Stayed the same | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

# ASK ALL

**K3 In the next 12 months, do you expect your turnover to increase, decrease or stay roughly the same?**

**SINGLE CODE.**

|  |  |  |
| --- | --- | --- |
| Increase | 1 |  |
| Decrease | 2 |  |
| Stay the same | 3 |  |
| DO NOT READ OUT: Don’t know | 4 |  |
| DO NOT READ OUT: Refused | 5 |  |

L. CLOSING

# READ OUT TO ALL

# That’s the end of the interview, thank you very much for your time. I just need to run through a few questions before you go.

# ASK ALL

**L1 As part of this research, the University of Warwick will be conducting some further follow up work on this topic to improve their understanding of the issues identified by this survey. Would you be willing for us to pass on your name, contact details and relevant survey responses so they could invite you to take part?**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |

ASK ALL AGREEING TO FURTHER CONTACT (L1=1)

**L2 And can I just confirm the best number to contact you on is [**SHOW TELEPHONE NUMBER**]?**

 SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No - write in number | 2 |  |

# ASK ALL AGREEING TO FURTHER CONTACT (L1=1)

**L3 And can I take a note of your email address please?**

 SINGLE CODE.EMAIL

|  |  |  |
| --- | --- | --- |
| Yes – WRITE IN EMAIL | 1 |  |
| No | 2 |  |

ASK ALL

**L4 <IF N1=2 For quality control purposes, > Can I just confirm your name?**

SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| Yes - Write in name | 1 |  |
| No – refused | 2 |  |

# ASK ALL

**L5 If you would like, we can also email you a summary report of our findings as a thank you for taking part once the research has been completed**. **Would you like us to email you the report?**

SINGLE CODE.

|  |  |  |
| --- | --- | --- |
| IF L3=YES: Yes | 1 |  |
| IF L3=NO OR L1=NO Yes - Write in email | 2 |  |
| No | 3 |  |

ASK ALL

**N5 It is sometimes possible to link the data we have collected with other government surveys or datasets to enable further statistical analysis. Would you be happy for this to be done?**

SINGLE CODE.

ADD IF NECESSARY: **Your confidentiality will be maintained, and linked data will be anonymised and only used for statistical purposes.**

|  |  |  |
| --- | --- | --- |
| Yes | 1 |  |
| No | 2 |  |

READ OUT TO ALL

**Finally, I would just like to confirm that this survey has been carried out by OMB Research and within the rules of the MRS Code of Conduct.**