

All we survey
Inside the CBI's business surveys



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Foreword

The CBI business surveys are vital in helping us understand the current and expected health of the UK economy. Their longevity reflects the prevailing value of business survey data and, most importantly, the dedication of the businesses who regularly contribute every month. Our surveys have a broad appeal and their value to the national and international business research communities continues to expand.

We want to share the detail to our surveys of business with you and I hope this publication will spark interest and discussion about *All we survey*. As the CBI's new director of economics, it is an exciting privilege to be at the centre of this activity, where tangible signs of economic growth are so keenly anticipated by business, government, the media and the general public. As the guardians of such a wealth of survey data, I consider it vital that we continue to increase the awareness, coverage and value of these surveys, while maintaining our established tradition for methodological rigour and analytical transparency.

This guide is timely. A real understanding of the economy and the demand for up-to-the minute economic information are now both at the top of everyone's agenda. With this very much in mind, our mission will be to nurture these key indicators, taken from the heart of business, for many years to come.



Stephen Gifford
CBI director of economics

History and background

introduction

The CBI's business surveys of the private sector economy have a long lineage. In February 1958, the industrial trends survey received its first responses from British manufacturers, as a direct result of the pressing need for really up-to-date information from industry on developments in their part of the economy. Those difficult prevailing economic conditions were a catalyst for identifying the value of regular, consistent and timely information from the desks of those in business, so that trends and cycles in the health of the economy could be captured and analysed scientifically. Since those early days, the CBI has maintained and developed a solid portfolio of qualitative business surveys central to its policy and lobbying activity and which are keenly observed and used by the media, the Bank of England and HM Treasury policymakers, national and international institutions, business analysts and the academic community.

CBI business surveys are qualitative – reflecting the respondent's subjective assessment of key aspects of their company sentiment and activity. Our respondents will typically be from the decision-makers in business – at chair or CEO level – and on a monthly and/or a quarterly basis, they add their valuable individual perspectives via our recognised questionnaires. The questions themselves remain the same – allowing the individual trend-line to build up month-by-month or quarter-by-quarter, to become part of the final CBI perspective – when all the responses have been included, anonymised and then calculated into what is known as 'an aggregate response'.

Each survey employs a highly accessible 'balance' methodology which focuses on the data yielded by subtracting a negative score from a positive score. Correctly interpreted, the balance data is a recognised and well-respected summary statistic that provides key information for building and analysing the business cycle. Data is collected for the same period in each month, building a reputable body of cyclical information, and up-to-date and transparent technical weighting measures are applied to the data derived from official statistics. The use of weighting lets us assign an appropriate economic value to each company that takes part.

These surveys have expanded significantly over the years to cover UK manufacturing and its regional dimension, retail, wholesale and motor trades distribution, business, professional and consumer services as well as financial services. As part of this long lineage, we provide key datasets to the European Commission's Economic Sentiment Indicator (ESI) on a monthly basis, ensuring the data we send them has been through a statistical harmonisation process, to conform and match with the internationally recognised and respected parameters of business survey practice.

At the heart of our surveys is our consistent methodology – where each individual response is treated with the utmost confidentiality, care and attention, where the trust that respondents from both CBI member and non-member companies demand is enacted and enhanced and where scientific care is taken to ensure our questions continue to be relevant, monitored and communicated to as wide an audience as possible. Our survey samples are made up of senior executives who are managing and optimising their businesses in tough times: it is our privilege to be able to capture their data and carry it through the calculation, analysis and interpretation process in tandem with the CBI economists, so we can offer aggregated key insights into the macro-economy on a regular basis. We thank them for their valued input.

We hope this guide is a useful introduction to the structure of our business survey work and that it encourages you to develop your understanding of how these surveys work. We will of course be pleased to hear from you at any time.



Jonathan Wood
head of CBI survey management group

Meet the team



Jonathan Wood head of group

Jonathan is responsible for the operation and technical and business development of the CBI's business surveys. He manages a team of three full-time staff and has over 30 years experience in the field of business survey development and management. Jonathan has attended the DGii ECFIN meetings at the European Commission since 1984 and has worked closely with the EU/OECD on data harmonisation and survey methodology issues. He also has responsibility for the sub-contract survey processing and programming work completed on behalf of the European Commission.

Jonathan has been instrumental in the origination and ongoing development of its surveys of distributive retail and wholesale/motor trade (1983), financial services (1989) and the service sector (1998 UK and 2002 EU) as well as the long-running CBI regional trends survey (1990). Jonathan also provides key consultative survey advice to CBI member companies, as well as forging research links with national and international stakeholders and the academic community.

Jonathan is a member of the Centre for International Research on Economic Tendency Surveys (CIRET).



Nicola Grimwood senior survey coordinator

Nicola has worked at the CBI since May 2000 and is responsible for the day-to-day operations of the CBI business surveys and directly for their efficient field work, processing and data distribution to UK stakeholders and the European Commission. Nicola has extensive experience of data processing techniques, postal and online survey methodology, contingency management, data testing and analysis.

She has first-line responsibility for all main periodicity, frequency, non-response issues across the entire portfolio of CBI Business surveys. Nicola has worked on all the CBI surveys and has been responsible both ensuring their consistent accuracy and risk management activity and for team development activity. She works closely with the CBI's chosen IT and statistical sub-contractors to ensure the effective and accurate development of new survey question requirements on the CBI survey system and other developmental statistics-related issues.

Nicola has been instrumental in scoping, developing and using a new micro-data function which has provided exceptional new perspectives and opportunities for the understanding and use of our business survey data, not least in enacting the recent NACE Rev: 2 and SIC 2007 projects on behalf of the European Commission and CBI national requirements. She is also responsible for CBI data supply to the Bank of England, HM Treasury and data vendor organisations in the UK and across the world.



Rebecca Wong
survey operations and research executive

Rebecca has project-led this guide to success from initial developments to the final stages of production, a guide providing a detailed insight and analysis in to the structure, procedures and methodologies used for the CBI's business surveys. Rebecca joined the survey management group in May 2011, having worked in the public sector for the NHS, where she gained significant experience for handling large amounts of sensitive data.

She is responsible for enacting confidential data scrutiny and processing across our portfolio of surveys on a monthly basis and supplying key data deliveries to our stakeholders and data vendors. Rebecca conducts regular corporate research across the entire spectrum of private sector activity to develop and maintain the representative nature of our survey samples using a wide variety of industry research resources, and also provides project and research support to the team. Other responsibilities include implementing new and innovative ways to boost CBI survey activity and improving the directorate's survey brand presence online, capturing the CBI's survey and website statistics on a monthly basis.



Christopher Taylor
technical survey development executive

Christopher joined the survey management group in May 2010, bringing with him extensive experience in data processing, data entry, sampling, recruitment and corporate research. Christopher has a background in financial administration and client interaction and management and had a major involvement in developing a financial tracking and data tracking system for the UK's largest rail services provider.

He is working on all the CBI business surveys and in particular on detailed non-response activity and corporate research to enrich the survey samples that we have developed. He is responsible for sourcing significant companies for the retail and service sector survey in particular based upon their turnover and employment measures and has developed special tools to monitor response and non-response and the quality of company that enters the survey frames. Christopher uses the latest publically available company database recruitment sources to enrich our samples, and is embarking on web-enablement activity for the group.

'The survey management group (SMG) is the guardian of CBI data, ensuring all activities are carried out with utmost confidentiality and accuracy, enabling respondents to complete the business surveys with complete confidence'

Survey methodology

Keeping it safe and sound

The CBI survey management group executes the highest standards of confidentiality for all participants, protecting the individual's identity and the data they provide. All business surveys and their data are calculated and analysed on an anonymous basis, and so to maintain anonymity we do not publish datasets with too few participants.

As the group encounters and deals with highly sensitive and competitive individual company data on a daily basis, it is vital that no-one outside of the group is allowed access to a company's identity or data. This strict guarantee is reinforced by the European Commission's established regulations on survey secrecy governing EU institutes supplying data as part of a survey.

All CBI staff queries regarding the confidentiality of participants and its policy are addressed to Jonathan Wood, head of the survey management group (SMG). Our policy of processing all replies in-house and storing them under strict confidential controls ensures nobody outside the survey management group has access to the identity or identifiable data from any participating company.

Keeping it accurate

Questionnaires are scrutinised manually as we receive them to ensure all data is present, and are not revised at any time, ensuring a true representation of the data received from participants. After the scrutiny procedure the questionnaires are processed directly and put into aggregations to be categorised. The survey data is not seasonally adjusted and this conforms with European Commission requirements – where all questions exclude seasonal variations from their answers.

Exhibit 1 CBI survey methodology

Despatch

Surveys are despatched to participants.

1

Collection

Surveys are personally collected by the survey management group once complete and returned.

2

Scrutiny and processing

All surveys are manually scrutinised and processed with high levels of accuracy on the in-house survey system.

3

Raw weighted data

Once the data has been collected in the specified time period, it is calculated using weights and survey originals are stored under strict confidentiality controls.

4

Economic analysis

Once the weighted figures are produced, they are analysed by the economic analysis team.

5

Data preparation and usage

The data is released at the specified date and time to key stakeholders and data vendors.

6

Release

Data finally released to the media and the public.

7

Processes and operations

Constant development and maintenance of the qualitative 'trends' style methodology are just two of the ongoing tasks for the survey management group. This includes the responsibility for the operation and order of complete and regular cycles of business surveys, all of which takes place in-house. To maximise regular and good response rates, the format and design are consistent across the whole suite of surveys. We also regularly monitor our business sample, making improvements when necessary to ensure the sample is optimised at all times. This means we can approach, potential new companies with a higher chance of them participating.

The samples are a blend of parent and subsidiary files sourced from UK sector trade associations, CBI regional office contacts and publically available databases such as OneSource and Kompass. Once contact names and addresses have been found for companies from a wide range of sectors, the target company is approached to determine which survey they can best contribute to. Surveys are sent back by post, fax and PDF, and are personally collected by members of the survey management group and manually scrutinised before being processed into the survey system.

There may be instances where participants have not completed components of the questionnaire. In these cases the SMG will either contact the respondent or will impute the data where it is appropriate to do so.

Data from the questionnaire is entered with great care and precision to ensure a true representation of response. This is done using our in-house system which runs on SQL software and was developed by Jonathan Wood in 1999/2000.

After processing the survey results, data is then produced using the percentage balance formula, calculated on the basis of the differences between those who have answered negative and those positive. The processed data is then finally supplied to the CBI's own economists, the Directorate-General for economic and financial affairs of the European Commission, and key stakeholders such as the Bank of England, HM Treasury and data vendors.

The survey management group has previously conducted preliminary computer calculation runs in response to changes in interest rates or as a result of exceptional national or global events – such as 9/11, the 2004 Madrid bombings or the 2011 Japanese tsunami. Should interest rates change, pre-runs of the data will be conducted in advance of the final calculation date. Conducting these pre-runs will ensure that there are relevant referencing points and periods available within the data: these reference points allow trends to be identified and comparisons to be made before and after an incident.

From the calculation runs, data is automatically produced at firm level with detailed time series for all surveys, capturing all the micro-data, and this is used as a complementary tool by the SMG and CBI economists to assist their understanding of components in the survey data. The data is restricted to internal use except previously for the National Institute for Economic and Social Research (NIESR) and currently the Bank of England, where anonymised micro-data is shared under strict contract agreements.

Balance methodology

Once responses are processed they are converted into weighted data derived from the percentage balances. These statistics are figures derived from the difference between the weighted percentage of the companies answering in the positive, minus those answering negative. In turn this allows a single figure with a plus or minus value to represent the answer to any question in any survey. So by subtracting the 'downs' from the 'ups', the resulting percentage 'balance' is a summary statistic normally used in qualitative surveys to indicate a trend with a positive/negative

balance indicating a rising/falling trend. Since most of the questions refer to changes in the value of a variable, the absolute value of a balance will give a guide to the change in the variable concerned.

Corporate research and recruitment activities

The survey samples are a mixture of CBI members, non-member companies and external data sources such as OneSource, Kompas and trade association members. Every potential participant approached is carefully researched and selected for each survey from sourcing the correct address to finding the right contact to gain the best chances of response. Another strategy the group has implemented when recruiting is approaching only private parent and independent companies, minimising subsidiaries, to make sure the company's trade status is not dormant and does not have a gazette code present.

When a company's status is dormant, it indicates that it is a company with significant limited accounting transactions during the accounting period. Companies with a gazette code present are also avoided as those with one attached implies that the company has been categorised as failing or has already failed, with the usual codes being in liquidation, administration, closed or dissolved. These rigorous criteria reduce the number of 'gone-aways' the group receives and makes a more effective post.

Exhibit 2 Numbers of participants approached

Survey	New participants (quarterly)	Regular sample (every survey period)
Industrial trends/ investment intentions	1,000	2,200
Distributive trades	800	900
Service sector	800	770
Financial services	1,000	450

Each survey has a targeted recruitment sample size every quarter, which varies according to each survey alongside the sample already on the survey system.

CBI business survey system

Set up in 2000, the survey system manages the complete survey operation on one unified IT platform and was developed to convert, transfer and enhance all SMG survey processes.

Managed on a secure intranet using Microsoft web browser technology, the system is accessible only to members of the survey management group, again reinforcing the confidential and sensitive treatment of the surveys.

Benefits of the system:

- All surveys are managed under one secure database
- The SMG has complete management and control over the data, including the pre-data entry scrutiny process. This is crucial for the integrity of the survey data, as each survey requires an intuitive approach
- The system allows us to adapt existing surveys to incorporate new features and construct completely new surveys, which is of immediate benefit to the CBI's economics directorate, reduces reliance on external software/systems support, and means we keep all survey activity in-house and confidential
- The system reduces the calculation processing times significantly
- The SMG can transmit final data by email, allowing the CBI to meet all transmission requirements of the European Commission and other business organisations
- Unnecessary administrative activities have been significantly reduced
- The system offers flexibility and is built to take forward the likely future requirements for web-enabled surveys.

Capturing survey response patterns

At the end of every survey period, Excel spreadsheet reports are produced to keep records of the daily incoming responses. This is then broken down further to show the method of return – fax, post or email – giving us a record of the most effective and popular choice of return for participants.

Other reports produced by the group are the monthly and annual reports of all survey totals, exploring trends and linking reasons for falls and rises in response patterns to national or global events or the health of the UK economy. This kind of vital information can in turn be used to explain certain results during press conferences and allows those outside the CBI to take wider external circumstances into consideration.

An additional report is produced monthly showing the number of new participants a survey has gained during a recruitment drive, and the number of gone-aways is also noted for comparison. If from the reports we discover a large portion of the gone-away companies were not suitable (ie in administration, liquidation, closed or dissolved), discussions among the survey management group will then be made about the revisions needed to the recruitment strategy in order to reduce the number of gone-aways.

Sampling and non-response

The survey management group devotes considerable time to optimising the sample, ensuring it is in reliable condition and that it covers all sectors evenly for each survey, to provide a true representation of businesses in the UK. Existing companies who have not responded to the survey within the last six months will have their details examined using online resources such as the company's website, Companies House and OneSource to check whether contact or address details have changed and the status of the company – ie dissolved, in administration, in liquidation or closed. A decision is then made on whether the details should be amended or whether to approach them as a new participant or remove them from the database.



3 Technical structure

Weights and aggregates

Essential to the integrity of our surveys is the scientifically calculated weighting process we apply to all of them.

The main purpose of the weighting frame is to identify the constituent blocks of respondents (usually addressed as 'cells') and then applying a pre-determined weighting value in the total survey result, irrespective of the actual total number of replies received from participants in each cell.

The weights and aggregates are a central part of calculating the results of each survey, and the process integrates individual responses to total data for each sector with the panel of responses as a whole. Designed to provide an appropriate value to individual survey data according to size and turnover, and based on data from Office for National Statistics (ONS) and other official sources, these weights are used during the calculation process to ensure individual and aggregate survey data reflect the appropriate balance of company and sector proportion in the macro-economy.

The calculation process

The percentage of answers to each reply option is calculated. At this stage two alternatives become available:

- A simple counting of the answers and a weighted counting. Numbers of positive and negative replies are counted which are then expressed as percentages of the total number of firms in the sector.
- A weighting coefficient is used for each firm representing a component of its official size, such as the employment, turnover or the production of the company.

The answers to each option are then given as the sum of coefficients of the firms that have given the same reply. The aim at this point is to reduce the bias introduced by the inclusion of companies with different sizes. The weighting of the business survey results does not follow the same reasoning as that applied to the calculation of official statistical indicators.

In the case of business survey information there are no quantities involved, therefore weighting individual responses according to some element of size (employment or number of establishments) can attach a greater significance to judgements and predictions of larger firms. This may at first imply that larger firms judge or predict better than small firms, but it should not be held as an assumption in relation to the effect of the weights and will give a greater weight proportion of smaller firms with the survey panel as a result.

Thus the main reason for applying weights to individual responses is the assumption that all firms regardless of size, base their reply on the direction of change/trend in a particular answer to the same estimated subjective rate. If this is the case, it is safe and reasonable to assume that a 'positive' or 'increase' answer to a particular question from a larger firm, carries more weight than the same answer from a smaller firm.

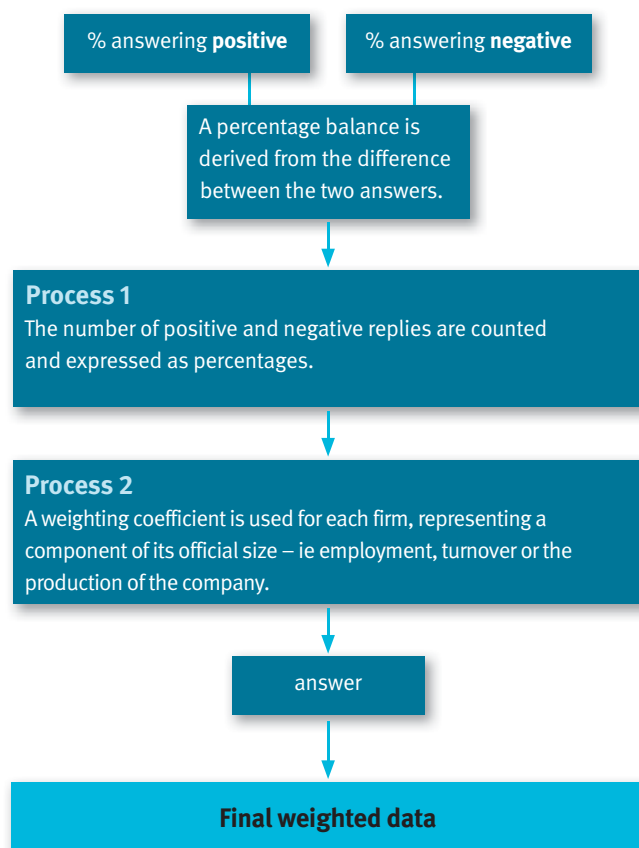
Once the results for each sector/grouping have been calculated, the results for the overall total are calculated as weighted averages by sector/grouping. Weighting measures at this stage reflect the relative significance of each sector in the survey frame via the measure derived from official statistics. This is used to improve the quality of the sample data by correcting possible discrepancies of representation.

When business survey data is aggregated to higher levels, a weighted average of country results is obtained by applying relevant country weights. These weighting values are value-added or export-based in the case of the industrial trends survey (industry) and private consumption in the case of distributive trades survey (retail).

Keeping the weights up to date

To maintain the highest possible standard of data, the survey management group conducts yearly updates of the survey weights. This ensures the data is as representative as it can be with external data/ economic trends and that all participants are represented correctly in the results. We have established a robust process allowing survey weights to be updated efficiently and effectively.

Exhibit 3 The calculation process



Data vendors, stakeholders, external software support and internal staff (press office and IT) are notified during annual reweighting work to ensure every process of the project runs smoothly and successfully. The figures for the weights are then applied to the survey system. Before going live with the new weight changes, thorough testing is conducted by analysing the results with our own backcast data to ensure the data produced from all the surveys is rigorously examined and analysed before publication.

Redefining sectors

In 2010 the survey management group undertook a full technical conversion project to maintain the integrity of our data and to redefine the way sectors are classified and reported in CBI surveys. We took into account the statistical standards which allow for comparisons to be made across other external indicators, ensuring surveys provide reliable data on industry/economic trends. The process was conducted in respect of the Standard Industry Classification (SIC) and the EU NACE classification scheme.

The conversion necessitated clearly defined and agreed classification systems for economic activities, bringing these up to standard and ensuring use of the most recent form of the industry classifications in the UK, consistent with the latest Standard Industrial Classification (SIC 2007).

When survey results are collated and aggregated every month or quarter, the raw data is categorised by firm size and sector and each response is given a weight according to the proportion of UK economic activity it represents. The subsector weights derive from the latest Office for National Statistics (ONS) annual business inquiry of business and consumer behaviour (2010) provided to the European Commission. The Commission's own requirements mean we are consistently making sure all new sector groups in the surveys reflect the latest industrial EU NACE classification (Rev.2).

How things have changed

To reflect the current relative importance of differing sub-sectors in the manufacturing sector, the weights of sub-sectors for the industrial trends survey have changed because of the reclassification, as a result of changes in economic activity. For example, under the previous classification, the manufacture of food and beverages was grouped into one division but under SIC (2007) these are now separated.

The most evident change is the service sector survey and its full classification of the sector, with it now being a lot more detailed to reflect the growing importance of the UK service sector as it has evolved over time. For example, the SIC code '63.12 web portals'

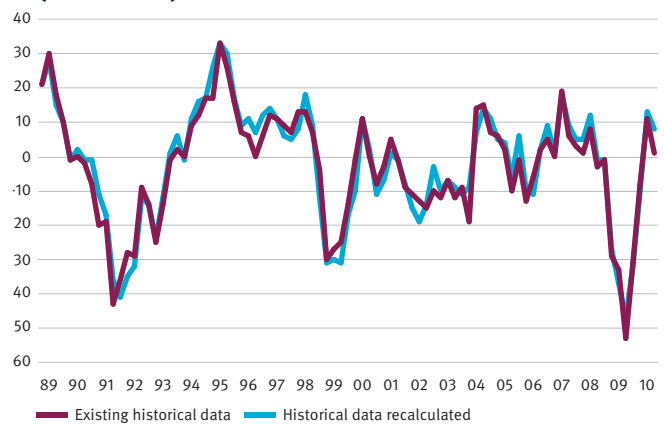
is now a new stand alone classification under the heading of 'Information service activities' rather than being conjoined in to another existing classification.

As well as breaking down business sectors into more granular detail, the expansion and widening of the coverage in the service sector survey has been made. For example, coverage of 'transport of goods & post' sub-sector has widened to capture freight water and air transport, warehousing and other support activities for transportation.

Since July 2010, all our quarterly and monthly surveys have been published using the new sector classifications and spliced onto existing historical data. Although the reclassification of the survey results have changed in terms of the way the subsector data is categorised and aggregated, the overall revision has had little change to the headline data in the business surveys. After studying the existing historical survey data and the equivalent figures recalculated using the revised classification and survey weights at an aggregate level, the differences between the 'old' and the 'new' weighted ITS survey data are statistically insignificant.

The reclassification and re-weighting exercise has caused little or no change to the long-term trend of the survey results. Comparisons to existing survey data with equivalent results recalculated using the revised sector classifications and weights, showed that the average difference between the two datasets over time is statistically insignificant for all the survey questions.

Exhibit 4 ITS Q8 – volume of output, past 3 months (% balance)



Data supplies, vending and stakeholders

As well as being exploited by our economists, CBI survey data is also used on a much wider scale. For example, the processed data has been featured extensively in the Bank of England's research and analysis publications, including in its 2010 Q3 quarterly bulletin *What can we learn from surveys of business expectations?* by Tracy Wheeler.

The data plays a key part in the discussion process of the CBI's economic affairs committee where the assessment of the macro-economy is developed. The CBI's director of economics and colleagues also regularly discuss CBI business survey data with the Bank of England, the Treasury and the Office for Budgetary Responsibility (OBR).

The results are also keenly anticipated by the media and by business in general. CBI data is also available to companies and analysts – such as data vendors and stakeholders – on a monthly and quarterly basis, demonstrating the breadth and penetration of the survey management group's work.

“The [CBI’s] processed data has been featured extensively in the Bank of England’s research and analysis publications.”



Industrial trends survey

The industrial trends survey (ITS) is the longest running UK private sector qualitative business tendency survey. It covers 39 sectors of UK manufacturing industry by three employment size bands and is completed at chairman, managing director, chief executive, finance director, operation director/production manager level. It celebrated its 50th anniversary in 2008.

Inception

Quarterly – 1958, monthly – 1975.

Frequency

Quarterly – conducted every January, April, July and October.

Monthly – conducted every February, March, May, June, August, September, November and December.

Sponsorship

Neither the monthly nor quarterly survey is sponsored.

Range of economic activity

UK manufacturing and processing industries. The survey contains three employment size groups and three market sectors (investment, intermediate and consumer goods) and covers 17 broad group headings and 39 individual industry sectors.

Technical structure

The survey contains a weighting system made up of 39 individual industries by three employment size groups, which converts to a matrix of 234 cells. The weighting values in each cell are derived from official government data provided by Office for National Statistics (ONS). The values cover manufacturing output and gross value-added. The gross value-added measure relates to the value generated by any unit engaged in production and the contribution of individual sectors/industries to the gross domestic product (GDP). The weighting matrix allows company size and economic importance to be taken into account as key components of calculation methodology.

Survey period and lead-time to release

Two and a half weeks is the normal survey period, during which completed questionnaires are returned to the survey management group for processing and usually sent out during the latter part of the final week of any month. The analysed data is usually released within five working days for the monthly trends survey and within eight working days for the quarterly survey. During this period the data is analysed by the economic analysis department.

Sample and response characteristics

The industrial trends survey represents around 12% of the total employment within UK manufacturing. The survey has an average response rate of 424 responses, making up of around 21% of the total number of firms on our survey panel. The survey has a core of around 400 companies with the balance made up of irregular participants and companies who have responded for the first time. Survey responses are generally slightly less in the quarterly questionnaires – possibly due to the number of extra questions companies have to answer.

Number of questions and answering times

The quarterly survey has 24 questions and the monthly survey has four questions, with a number of these having sub-sections. The quarterly survey will take on average five minutes to complete, whereas the monthly survey will take only one and a half minutes to complete.

Main subject areas

The quarterly survey covers optimism regarding the general and export business situation, investment, capacity, order books, numbers employed, output, deliveries, stocks, prices, constraints to output, export orders, constraints on investment, competitiveness on domestic, EU and non-EU markets, innovation and training. On the other hand, the monthly survey covers domestic and export orders, stocks, price and output expectations.

financial services survey (FSS)

property trends survey (PTS)

service sector survey (SSS)
– monthly and quarterly

1989

1994-2009

1998

The questions relate to the trend in an economic variable using the percentage balance. It also has subjective questions concerning normality and adequacy, constraint-style questions not provided by official statistics and expectation questions which allow comparisons with past data and the development of the business cycle.

Key benefits of qualitative business survey data

The ITS builds up a consistent business cycle that can be tracked with official statistics and used for extensive key business research, providing an accurate picture of perceptions and expectations that allow the business community a sound basis for evaluating the current situation and for the formulation of future strategic decision making. The data forms the basis for the CBI's short-term forecasts of UK manufacturing published each quarter in the economic and business outlook and provides a strengthening of the interpretative perspective of the data that relies heavily on comparisons with past data. Therefore, the survey questions cannot easily be changed without disturbing the predictive nature of the results.

Data supply to the European Commission

The key questions from both surveys are supplied in harmonised form to the European Commission each time they are produced. The CBI has supplied this information to the EC for over 35 years and is a key survey data provider for the current EC survey *Conjuncture*, made up of business survey experts from all the EU member states. The CBI receives an annual financial grant from the European Commission for the supply of this data.

'[The ITS] provides an accurate picture of perceptions and expectations that allow the business community a sound basis for evaluating the current situation and for the formulation of future strategic decision making.'

Confidential



In the event of industrial action by postal workers, please fax your response to the usual dedicated numbers below.

Industrial trends survey Number 207 January 2013

For office use only:

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Welcome to the CBI quarterly industrial trends survey. We would like to thank you for your valued support of the survey – providing us with a key insight into manufacturing conditions. The survey includes special questions on firms’ price inflation and wage growth expectations. Data from these questions will be provided to The Bank of England on a strictly confidential and anonymised basis. If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is **Wednesday 9 January 2013**. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK manufacturing operations only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 Are you more, or less, optimistic than you were three months ago about the general business situation in your industry?

More	Same	Less
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Are you more, or less, optimistic about your export prospects for the next twelve months than you were three months ago?

More	Same	Less	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 Do you expect to authorise more or less capital expenditure in the next twelve months than you authorised in the past twelve months on:

	More	Same	Less	n/a
a) Buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Plant and machinery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Is your present level of output below capacity (ie are you working below a satisfactory full rate of operation)?

Yes	No	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4a What is your current rate of operation as a percentage of full capacity?

(please tick one box below. All participants should answer this question)

<input type="checkbox"/> 1-5	<input type="checkbox"/> 6-10	<input type="checkbox"/> 11-15	<input type="checkbox"/> 16-20	<input type="checkbox"/> 21-25	<input type="checkbox"/> 26-30	<input type="checkbox"/> 31-35
<input type="checkbox"/> 36-40	<input type="checkbox"/> 41-45	<input type="checkbox"/> 46-50	<input type="checkbox"/> 51-55	<input type="checkbox"/> 56-60	<input type="checkbox"/> 61-65	<input type="checkbox"/> 66-70
<input type="checkbox"/> 71-75	<input type="checkbox"/> 76-80	<input type="checkbox"/> 81-85	<input type="checkbox"/> 86-90	<input type="checkbox"/> 91-95	<input type="checkbox"/> 96-100	<input type="checkbox"/> 100%+

(ie overtime/extra shifts)

5 Excluding seasonal variations, do you consider that in volume terms:

	Above normal	Normal	Below normal	n/a
a) Your present total order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Your present export order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	More than adequate	Adequate	Less than adequate	n/a
c) Your present stocks of finished goods are	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please complete and return to the
CBI survey management group by **Wednesday 9 January 2013**

6 Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months, with regard to:

	Trend over past three months				Expected trend over next three months				
	Up	Same	Down	n/a	Up	Same	Down	n/a	
Numbers employed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7 Volume of total new orders <i>of which:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
a) domestic orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
b) export orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8 Volume of output (ie production)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9 Volume of:									
a) domestic deliveries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
b) export deliveries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10 Volume of stocks of:									
a) raw materials and brought-in supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
b) work in progress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
c) finished goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11 Average costs per unit of output	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12 Average selling prices at which:									
a) domestic orders are booked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
b) export orders are booked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13 Approximately how many months' production is accounted for by your present order book or production schedule?									
	<input type="checkbox"/> <1	<input type="checkbox"/> 1-3	<input type="checkbox"/> 4-6	<input type="checkbox"/> 7-9	<input type="checkbox"/> 10-12	<input type="checkbox"/> 13-18	<input type="checkbox"/> 18+	<input type="checkbox"/> n/a	

14 What factors are likely to limit your output over the next three months?

(please leave completely blank if you have no limits to output)

Orders or sales	Skilled labour	Other labour	Plant capacity	Credit or finance	Materials or components	Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15 What factors are likely to limit your ability to obtain export orders over the next three months?

(please leave completely blank if you have no limits to output)

Prices <small>(compared with overseas competitors)</small>	Delivery dates	Credit or finance	Quota and import licence restrictions	Political or economic conditions abroad	Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15a Excluding seasonal variations, what has been the trend in your competitiveness over the past three months, and what are the expected trends for the next three months, with regard to (please tick one box on each line):

	Past three months				Next three months			
	Improved	Unchanged	Worsened	n/a	Improved	Unchanged	Worsened	n/a
UK market only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other EU markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-EU markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16a In relation to expected demand over the next twelve months, is your present fixed capacity:

More than adequate	Adequate	Less than adequate
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16b What are the main reasons for any expected capital expenditure authorisations on buildings, plant or machinery over the next twelve months? (if you tick more than one factor, please rank in order of importance)

<input type="text"/>	To expand capacity	<input type="text"/>	To increase efficiency	<input type="text"/>	For replacement
<input type="text"/>	Other	<input type="text"/>	n/a		

16c What factors are likely to limit (wholly or partly) your capital expenditure authorisations over the next twelve months? (if you tick more than one factor, please rank in order of importance)

<input type="text"/>	Inadequate net return on proposed investment	<input type="text"/>	Uncertainty about demand
<input type="text"/>	Shortage of internal finance	<input type="text"/>	Shortage of labour, including managerial and technical staff
<input type="text"/>	Inability to raise external finance	<input type="text"/>	Other
<input type="text"/>	Cost of finance	<input type="text"/>	n/a

17 Do you expect to authorise more or less expenditure in the next twelve months than you authorised over the past twelve months on:

	more	same	less	n/a
a) Product and process innovation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Training and retraining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18 What has been the percentage change over the past 12 months in the general level of output prices in the UK markets that your firm competes in and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change				
	-8.1% to -10%	-6.1% to -8%	-4.1% to -6%	-2.1% to -4%	-0.1% to -2%		0.1% to 2%	2.1% to 4%	4.1% to 6%	6.1% to 8%	8.1% to 10%
Past 12 months	<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"/>
Next 12 months	<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"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %						Next 12 months <input type="text"/> %				

19 What has been the percentage change over the past 12 months in your firm's own average output price for goods sold into UK markets and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change				
	-8.1% to -10%	-6.1% to -8%	-4.1% to -6%	-2.1% to -4%	-0.1% to -2%		0.1% to 2%	2.1% to 4%	4.1% to 6%	6.1% to 8%	8.1% to 10%
Past 12 months	<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"/>
Next 12 months	<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"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %						Next 12 months <input type="text"/> %				

20 What has been the percentage change over the past 12 months in your firm's wage/salary cost per person employed (including overtime and bonuses) and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change		No change	Positive percentage change								
	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%	5.1% to 6%	6.1% to 7%	7.1% to 8%	
Past 12 months	<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"/>	
Next 12 months	<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"/>	
Other (please specify % +/-)	Past 12 months <input type="text"/> %							Next 12 months <input type="text"/> %				

Basic data section

Please enter here the code number of the main manufacturing activity covered by this return. (If you are unsure of your correct Industrial Classification, please state clearly below your manufacturing activity being as specific as possible)

How many employees are covered by this return?

1-199 200-499 500-4,999 5,000 and over

What is the annual ex-works value of your **direct exports**?

Nil-£75k £75k-£1m £1m-£3m £3m-£8m £8m-£15m £15m-£25m
 £25m-£40m £40m-£60m £60m-£100m £100m-£150m Over £150m

Please indicate the **annual turnover** covered by this return (please answer on behalf of your UK operation only)

£0-999k £1-9.9m £10-24.9m £25-99.9m £100-499m £500m+

Please enter the appropriate regional code according to the main geographic location of your manufacturing activities

(please see list below)

Regional codes 1-11

Code 1

Wales (Counties)
Gwent
Gwynedd
Mid Glamorgan
Powys
South Glamorgan
West Glamorgan

Code 2

Scotland (L A Region)
Borders
Central
Dumfries and Galloway
Fife
Grampian
Highland
Lothian
Strathclyde
Tayside
Islands

Code 3

Northern Ireland (Borders)
Belfast
South Eastern
Southern
North Eastern
Western

Code 4

North
Cleveland
Cumbria
Durham
Northumberland
Tyne and Wear

Code 5

Yorkshire & the Humber
East Yorkshire
(formerly Humberside)
North Yorkshire
South Yorkshire
West Yorkshire

Code 6

East Midlands
Derbyshire
Leicestershire
Lincolnshire
Northamptonshire
Nottinghamshire

Code 7

East Anglia
Camb
Norfolk
Suffolk

Code 8

South East
Bedfordshire
Berkshire
Buckinghamshire
East Sussex
Essex
Greater London
Hampshire
Hertfordshire
Isle of Wight
Kent
Oxfordshire
Surrey
West Sussex

Code 9

South West
Bath & North East Somerset
City of Bristol
North Somerset
South Gloucestershire
Cornwall
Devon
Dorset
Gloucestershire
Somerset
Wiltshire

Code 10

West Midlands
Hereford and Worcs.
Shropshire
Staffordshire
Warwickshire
West Midlands (met. county)

Code 11

North West
Cheshire
Greater Manchester
Lancashire
Merseyside



The CBI supplies the European Commission with harmonised manufacturing data, derived from the industrial trends survey. The CBI acknowledges the European Union's financial support for the technical development and supply of this data.

Your company details **please complete as fully as possible**

Your name

Your position

Company name

Address

Postcode

Telephone

Email

Confidential

**In the event of industrial action by postal workers,
please fax your response to the usual dedicated numbers below.**

Monthly trends enquiry Number 207a February 2013

For office use only:

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Welcome to the CBI monthly industrial trends survey.

We would like to thank you for your valued support of the survey – providing us with a key insight into manufacturing conditions.

If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is **Wednesday 13 February 2013**. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK manufacturing operations only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 Excluding seasonal variations, do you consider that in volume terms:

	above normal	normal	below normal	n/a
(a) Your present total order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Your present export order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Your present stocks of finished goods are:

	more than adequate	adequate	less than adequate	n/a
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 Excluding seasonal variations, what has been the trend over the **past** three months and what are the expected trends over the **next** three months with regard to:

	up	same	down	n/a
Volume of output: Past three months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Next three months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Excluding seasonal variations, please indicate the expected trend over the **next** three months with regard to:

	up	same	down	n/a
Average prices at which domestic orders are booked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Numbers employed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please complete and return to the
CBI survey management group by **Wednesday 13 February 2013**

Basic data section

Please enter the code number of the main manufacturing activity covered by this return. If unsure of your correct standard industrial classification, please state clearly below your main manufacturing activity

How many employees are covered by this return?

1-199 200-499 500-4,999 5,000 and over

What is the annual ex-works value of your direct exports?

nil-£75k £75k-£1m £1m-£3m £3m-£8m £8m-£15m £15m-£25m £25m-£40m £40m-£60m £60m-£100m £100m-£150m over £150m

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

£0-999k £1-9.9m £10-24.9m £25-99.9m £100-499m £500m+

Please enter the appropriate regional code according to the main geographic location of your manufacturing activities (see list)

Regional codes 1-11 ***Code 1**

Wales (Counties)
Flintshire
Gwent
Gwynedd
Mid Glamorgan
Powys
South Glamorgan
West Glamorgan

Code 2

Scotland (L A Region)
Borders
Central
Dumfries and Galloway
Fife
Grampian
Highland
Lothian
Strathclyde
Tayside
Islands

Code 3

Northern Ireland
(Borders)
Belfast
South Eastern
Southern
North Eastern
Western

Code 4

North
Cleveland
Cumbria
Durham
Northumberland
Tyne and Wear

Code 5

Yorkshire & the Humber
East Yorkshire
(formerly Humberside)
North Yorkshire
South Yorkshire
West Yorkshire

Code 6

East Midlands
Derbyshire
Leicestershire
Lincolnshire
Northamptonshire
Nottinghamshire

Code 7

East Anglia
Camb
Norfolk
Suffolk

Code 8

South East
Bedfordshire
Berkshire
Buckinghamshire
East Sussex
Essex
Greater London
Hampshire
Hertfordshire
Isle of Wight
Kent
Oxfordshire
Surrey
West Sussex

Code 9

South West
Bath & North East Somerset
City of Bristol
North Somerset
South Gloucestershire
Cornwall
Devon
Dorset
Gloucestershire
Somerset
Wiltshire

Code 10

West Midlands
Hereford and Worcs.
Shropshire
Staffordshire
Warwickshire
West Midlands (met. county)

Code 11

North West
Cheshire
Greater Manchester
Lancashire
Merseyside



*The CBI supplies the European Commission with harmonised manufacturing data, derived from the industrial trends survey.
The CBI acknowledges the European Union's financial support for the technical development and supply of this data.*

Your company details please complete as fully as possible

Your name

Your position

Company name

Address

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Distributive trades survey

The distributive trades survey (DTS) is aimed at chairman, chief executive, finance director, sales manager, proprietor, shop or department manager, sole trader/owner-manager level. Covering 24 sectors of UK retail, wholesale and motor trade activity by three employment size bands, it has an authoritative time series of data stretching back to its inception in 1983. The DTS has established a sound reputation and is widely reported as the CBI's 'high street' survey, which also takes in to account internet sales and will celebrate its 30th anniversary in July 2013.

Inception

Monthly and quarterly – July 1983.

Sponsorship status

The CBI monthly and quarterly distributive trades survey were sponsored by The Financial Times from 1984 to 1989. They are not currently sponsored.

Frequency

Quarterly – conducted every February, May, August and November.
Monthly – conducted every January, March, April, June, July, September, October and December.

Range of economic activity covered

All UK outlet based retail and wholesale activity at the head office or regional HQ level, includes mail order and motor parts and accessory activity. The survey contains 24 retail sectors, three types of retail outlet, motor trades and mail order retailing and eight wholesale sectors which are differentiated by three employment sizes and motor trade activity is broken down further in to new vehicles and parts and accessories sales.

Technical structure

The survey infrastructure contains a weighting mechanism made up of two sets of weighting attributes. The standard weights consist of 24 sectors by three employment size bands, converting to a matrix of 72 cells. The secondary weights consist of three types of outlet (single outlet retailing, retailer with 2-9 branches and retailer with ten-plus branches) by three employment size bands. This converts to a matrix of nine cells. The survey data is weighted according to the gross value added (GVA) of each firm's sector and employment size.

Survey period and lead-time to release

Generally, two and a half working weeks are allocated for each survey period, during which completed questionnaires are returned to the survey management group for processing. The survey is usually sent out in the first week of the month with responses required by the last week of the same month. The analysed data is usually released within five working days for the monthly distributive trades survey and within eight to ten working days for the quarterly survey. During this period, the data is analysed by the economic analysis department.

Sample and response characteristics

The distributive trades survey sample is made up of around 500 companies specialising in retail sale and motor trades and another 350 in wholesale. The survey has a consistent average response rate of 145 a month, dipping slightly in the quarterly months, possibly due to the increase in the number of questions. The survey has a core of some 130 respondents, including 60 retailers and wholesalers with over 500 employees. The balance is made up of irregular participants and companies who respond for the first time. The survey response rates between the quarterly and the monthly surveys are generally balanced.

Number of questions and answering times

The quarterly and monthly questionnaires both take two to five minutes to complete. The quarterly survey has nine questions and the monthly survey has seven. Both questionnaires contain extra internet supplementary questions regarding their volume of sales and expectations on growth.

Main question subject areas

Both surveys cover volume of sales, orders on suppliers, sales for the time of year, stocks and internet sales, while the quarterly survey also covers imports, selling prices, numbers employed, investment and business situation. The questions relate to the trend in an economic variable using the percentage balance.

Key benefits of qualitative survey data

The survey has built up a consistent idea of the business cycle that can be tracked with official statistics for retail sales and distribution sector output. The data provides an accurate picture of the perceptions and expectations which in turn gives managers a sound basis for formulating strategic sales decisions.

Data supply to the European Commission

The key questions from the quarterly and monthly surveys are supplied in harmonised form to the European Commission each time they are produced. The CBI has supplied this information to the EC for nearly 30 years and is a key survey data provider for the current EC survey *Conjuncture*, made up of business survey experts from all the member states. The CBI receives an annual financial grant from the European Commission for the supply of this data.



Confidential



In the event of industrial action by postal workers, please fax your response to the usual dedicated numbers below.

Distributive trades survey
Number 354 December 2012

For office use only:
[] [] [] [] [] [] [] []

Welcome to the CBI monthly distributive trades survey. We would like to thank you for your valued support of the survey – providing us with a key insight into retail and wholesale conditions.

If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is Wednesday 12 December 2012. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK distributive activities only.

Thankyou very much in advance for your response.
Jonathan Wood – head of CBI survey management group

How do your sales and orders for this month and your expectations for the next month compare with those in the same month a year ago?

Form with checkboxes for sales and orders comparison across December, January, and the next three months.

What is the position with regard to your:

Form with checkboxes for business position (Good, Average, Poor, n/a) for sales and stocks.

5 Over the next three months, do you expect your overall business situation to:
[] Improve [] Remain stable [] Deteriorate

6 How does your employment compare with that in the same month a year ago?

Form with checkboxes for employment comparison across December, January, and the next three months.

7 How do you expect your average selling prices to change over the next three months? (please exclude seasonal variations)
[] Up [] Same [] Down [] n/a

Please complete and return to the CBI survey management group by Wednesday 12 December 2012

Internet sales

8 Do you currently sell goods over the internet?

Yes No (but plan to) No (no plans to)

9 How do your volume of internet sales for this month and your expectations for the next month compare with those in the same month a year ago?

December				January			
up	same	down	n/a	up	same	down	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10 How do your average prices for goods sold over the internet for this month and your expectations for the next month compare with those in the same month a year ago?

December				January			
up	same	down	n/a	up	same	down	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Basic data section

Please enter the business activity covered by this return (see codes opposite)

How many employees are covered by this return?

0-25 26-99 100-499 500 and over

What type of business does your reply cover?

Single outlet retailing Retailers with 2-9 branches Retailers with 10+ branches Mail order Motor trades Wholesaling

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

£0-999k £1-9.9m £10-24.9m £25-99.9m £100-499m £500m+

Your company details please complete as fully as possible

Your name Your position

Company name

Address

Postcode

Telephone Email

CBI classification listing for the distributive trades survey

Please code your response according to your main activity listed below. These codes are taken from the 2007 Standard Industrial Classification published by the Office of National Statistics.

Motor trades

- 45.1 Sale of motor vehicles
- 45.2 Maintenance and repair of motor vehicles
- 45.3 Sale of motor vehicle parts and accessories
- 45.4 Sale, maintenance and repair of motorcycles and related parts and accessories

Wholesale trade, except of motor vehicles and motorcycles

- 46.1 Wholesale on a fee or contract basis
- 46.2 Wholesale of agricultural raw materials and live animals
- 46.3 Wholesale of food, beverages and tobacco

Wholesale of household goods

- 46.41 Wholesale of textiles
- 46.42 Wholesale of clothing and footwear
- 46.43 Wholesale of electrical household appliances
- 46.44 Wholesale of china and glassware and cleaning materials
- 46.45 Wholesale of perfume and cosmetics
- 46.46 Wholesale of pharmaceutical goods
- 46.47 Wholesale of furniture, carpets and lighting equipment
- 46.48 Wholesale of watches and jewellery
- 46.49 Wholesale of other household goods

Wholesale of information and communication equipment

- 46.5 Wholesale of information and communication equipment

Wholesale of other machinery, equipment and supplies

- 46.61 Wholesale of agricultural machinery, equipment and supplies
- 46.62 Wholesale of machine tools
- 46.63 Wholesale of mining, construction and civil engineering machinery
- 46.64 Wholesale of machinery for the textile industry and of sewing and knitting machines
- 46.65 Wholesale of office furniture
- 46.66 Wholesale of other office machinery and equipment
- 46.69 Wholesale of other machinery and equipment

Other specialised wholesale

- 46.71 Wholesale of solid, liquid and gaseous fuels and related products
- 46.72 Wholesale of metals and metal ores
- 46.73 Wholesale of wood, construction materials and sanitary equipment
- 46.74 Wholesale of hardware, plumbing and heating equipment and supplies
- 46.75 Wholesale of chemical products
- 46.76 Wholesale of other intermediate products
- 46.77 Wholesale of waste and scrap
- 46.9 Non-specialised wholesale trade

Retail sale in non-specialised stores

- 47.11 Retail sale in non-specialised stores with food, beverages or tobacco predominating
- 47.19 Other retail sale in non-specialised stores
- 47.2 Retail sale of food, beverages and tobacco in specialised stores
- 47.3 Retail sale of automotive fuel in specialised stores
- 47.4 Retail sale of information and communication equipment in specialised stores
- 47.5 Retail sale of other household equipment in specialised stores
- 47.51 Retail sale of textiles in specialised stores
- 47.52 Retail sale of hardware, paints and glass in specialised stores
- 47.53 Retail sale of carpets, rugs, wall and floor coverings in specialised stores
- 47.54 Retail sale of electrical household appliances in specialised stores
- 47.59/1 Retail sale of musical instruments and scores in specialised stores
- 47.59/9 Retail sale of furniture, lighting equipment and other household articles (other than musical instruments) not elsewhere classified, in specialised stores

Retail sale of cultural and recreation goods in specialised stores

- 47.61 Retail sale of books in specialised stores
- 47.62 Retail sale of newspapers and stationery in specialised stores
- 47.63 Retail sale of music and video recordings in specialised stores
- 47.64 Retail sale of sporting equipment in specialised stores
- 47.65 Retail sale of games and toys in specialised stores

Retail sale of other goods in specialised stores

- 47.71 Retail sale of clothing in specialised stores
- 47.72 Retail sale of footwear and leather goods in specialised stores
- 47.73 Dispensing chemist in specialised stores
- 47.74 Retail sale of medical and orthopaedic goods in specialised stores
- 47.75 Retail sale of cosmetic and toilet articles in specialised stores
- 47.76 Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores
- 47.77 Retail sale of watches and jewellery in specialised stores
- 47.78 Other retail sale of new goods in specialised stores
- 47.79 Retail sale of second-hand goods in stores
- 47.8 Retail sale via stalls and markets
- 47.9 Retail trade not in stores, stalls or markets
- 47.91 Retail sale via mail order houses or via Internet
- 47.99 Other retail sale not in stores, stalls or markets



Confidential



In the event of industrial action by postal workers, please fax your response to the usual dedicated numbers below.

Distributive trades survey
Number 355 January 2013

For office use only: [grid]

Welcome to the CBI distributive trades survey. We would like to thank you for your valued support of the survey – providing us with a key insight into retail and wholesale conditions.

The closing date for this survey is Wednesday 16 January 2013. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

How do your sales and orders for this month and your expectations for the next month compare with those in the same month a year ago?

Table with columns for January and February, and rows for Volume of sales and Volume of orders placed on suppliers. Includes 'Past three months' and 'Next three months' sub-sections.

What is the position with regard to your:

Table with columns for January and February, and rows for Volume of sales, for the time of year and Volume of stocks, in relation to expected sales.

5 Over the next three months, do you expect your overall business situation to:

Improve, Remain stable, Deteriorate

Please complete and return to the CBI survey management group by Wednesday 16 January 2013

6 How does your employment compare with that in the same month a year ago?

	January				February			
	Up	Same	Down	n/a	Up	Same	Down	n/a
Numbers employed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
of which: a) full-time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) part-time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6a Numbers employed	Past three months				Next three months			
	Up	Same	Down	n/a	Up	Same	Down	n/a
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7 How do you expect your average selling prices to change over the next three months? (please exclude seasonal variations)

Up Same Down n/a

8 What has been the percentage change over the past 12 months in the general level of selling prices in the UK markets that your firm competes in and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change							
	-4.1% to -5%	-3.1% to -4%	-2.1% to -3%	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%			
Past 12 months	<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"/>			
Next 12 months	<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"/>			
Other (please specify % +/-)	Past 12 months					<input type="text"/>	%	Next 12 months					<input type="text"/>	%

9 What has been the percentage change over the past 12 months in your firm's own average selling price in UK markets and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change							
	-4.1% to -5%	-3.1% to -4%	-2.1% to -3%	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%			
Past 12 months	<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"/>			
Next 12 months	<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"/>			
Other (please specify % +/-)	Past 12 months					<input type="text"/>	%	Next 12 months					<input type="text"/>	%

10 What has been the percentage change over the past 12 months in your firm's wage/salary cost per person employed (including overtime and bonuses) and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change		No change	Positive percentage change								
	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%	5.1% to 6%	6.1% to 7%	7.1% to 8%	
Past 12 months	<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"/>	
Next 12 months	<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"/>	
Other (please specify % +/-)	Past 12 months			<input type="text"/>	%	Next 12 months					<input type="text"/>	%

Internet sales

11 Do you currently sell goods over the internet?

Yes No (but plan to) No (no plans to)

12 How do your volume of internet sales for this month and your expectations for the next month compare with those in the same month a year ago?

January				February			
up	same	down	n/a	up	same	down	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13 How do your average prices for goods sold over the internet for this month and your expectations for the next month compare with those in the same month a year ago?

January				February			
up	same	down	n/a	up	same	down	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Basic data section

Please enter the business activity covered by this return (please refer to the standard industrial classification on the reverse of the questionnaire)

How many employees are covered by this return?

0-25 26-99 100-499 500 and over

What type of business does your reply cover?

Single outlet retailing Retailers with 2-9 branches Retailers with 10+ branches Mail order Motor trades Wholesaling

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

£0-999k £1-9.9m £10-24.9m £25-99.9m £100-499m £500m+

Your company details please complete as fully as possible

Your name _____ Your position _____

Company name _____

Address _____

Postcode _____

Telephone _____ Email _____

The CBI acknowledges the European Union's financial support for the technical development and supply of this data.

CBI classification listing for the distributive trades survey

Please code your response according to your main activity listed below. These codes are taken from the 2007 Standard Industrial Classification published by the Office of National Statistics.

Motor trades

- 45.1 Sale of motor vehicles
- 45.2 Maintenance and repair of motor vehicles
- 45.3 Sale of motor vehicle parts and accessories
- 45.4 Sale, maintenance and repair of motorcycles and related parts and accessories

Wholesale trade, except of motor vehicles and motorcycles

- 46.1 Wholesale on a fee or contract basis
- 46.2 Wholesale of agricultural raw materials and live animals
- 46.3 Wholesale of food, beverages and tobacco

Wholesale of household goods

- 46.41 Wholesale of textiles
- 46.42 Wholesale of clothing and footwear
- 46.43 Wholesale of electrical household appliances
- 46.44 Wholesale of china and glassware and cleaning materials
- 46.45 Wholesale of perfume and cosmetics
- 46.46 Wholesale of pharmaceutical goods
- 46.47 Wholesale of furniture, carpets and lighting equipment
- 46.48 Wholesale of watches and jewellery
- 46.49 Wholesale of other household goods

Wholesale of information and communication equipment

- 46.5 Wholesale of information and communication equipment

Wholesale of other machinery, equipment and supplies

- 46.61 Wholesale of agricultural machinery, equipment and supplies
- 46.62 Wholesale of machine tools
- 46.63 Wholesale of mining, construction and civil engineering machinery
- 46.64 Wholesale of machinery for the textile industry and of sewing and knitting machines
- 46.65 Wholesale of office furniture
- 46.66 Wholesale of other office machinery and equipment
- 46.69 Wholesale of other machinery and equipment

Other specialised wholesale

- 46.71 Wholesale of solid, liquid and gaseous fuels and related products
- 46.72 Wholesale of metals and metal ores
- 46.73 Wholesale of wood, construction materials and sanitary equipment
- 46.74 Wholesale of hardware, plumbing and heating equipment and supplies
- 46.75 Wholesale of chemical products
- 46.76 Wholesale of other intermediate products
- 46.77 Wholesale of waste and scrap
- 46.9 Non-specialised wholesale trade

Retail sale in non-specialised stores

- 47.11 Retail sale in non-specialised stores with food, beverages or tobacco predominating
- 47.19 Other retail sale in non-specialised stores
- 47.2 Retail sale of food, beverages and tobacco in specialised stores
- 47.3 Retail sale of automotive fuel in specialised stores
- 47.4 Retail sale of information and communication equipment in specialised stores
- 47.5 Retail sale of other household equipment in specialised stores
- 47.51 Retail sale of textiles in specialised stores
- 47.52 Retail sale of hardware, paints and glass in specialised stores
- 47.53 Retail sale of carpets, rugs, wall and floor coverings in specialised stores
- 47.54 Retail sale of electrical household appliances in specialised stores
- 47.59/1 Retail sale of musical instruments and scores in specialised stores
- 47.59/9 Retail sale of furniture, lighting equipment and other household articles (other than musical instruments) not elsewhere classified, in specialised stores

Retail sale of cultural and recreation goods in specialised stores

- 47.61 Retail sale of books in specialised stores
- 47.62 Retail sale of newspapers and stationery in specialised stores
- 47.63 Retail sale of music and video recordings in specialised stores
- 47.64 Retail sale of sporting equipment in specialised stores
- 47.65 Retail sale of games and toys in specialised stores

Retail sale of other goods in specialised stores

- 47.71 Retail sale of clothing in specialised stores
- 47.72 Retail sale of footwear and leather goods in specialised stores
- 47.73 Dispensing chemist in specialised stores
- 47.74 Retail sale of medical and orthopaedic goods in specialised stores
- 47.75 Retail sale of cosmetic and toilet articles in specialised stores
- 47.76 Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores
- 47.77 Retail sale of watches and jewellery in specialised stores
- 47.78 Other retail sale of new goods in specialised stores
- 47.79 Retail sale of second-hand goods in stores
- 47.8 Retail sale via stalls and markets
- 47.9 Retail trade not in stores, stalls or markets
- 47.91 Retail sale via mail order houses or via Internet
- 47.99 Other retail sale not in stores, stalls or markets



Confidential



In the event of industrial action by postal workers, please fax your response to the usual dedicated numbers below.

Distributive trades quarterly survey Number 356 February 2013

For office use only:

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Welcome to the CBI quarterly distributive trades survey.

We would like to thank you for your valued support of the survey – providing us with a key insight into retail and wholesale conditions.

If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is **Wednesday 13 February 2013**. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK distributive activities only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

How do your sales and orders for this month and your expectations for next month compare with those in the same month a year ago?

	February				March			
	up	same	down	n/a	up	same	down	n/a
1 Volume of sales	<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 Volume of orders placed on suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Past three months				Next three months			
	up	same	down	n/a	up	same	down	n/a
2a Volume of sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2b Volume of orders placed on suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is the position with regard to your:

	February				March			
	good	average	poor	n/a	good	average	poor	n/a
3 Volume of sales, for the time of year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	too high	adequate	too low	n/a	too high	adequate	too low	n/a
4 Volume of stocks, in relation to expected sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5 Compared with a year ago, is the current proportion of your deliveries from suppliers accounted for by imports?

more	same	less	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please complete and return to the CBI survey management group by **Wednesday 13 February 2013**

CBI Centre Point 103 New Oxford Street London WC1A 1DU
T: +44 (0)20 7395 8081/8108 F: +44 (0)20 7836 1210/5856 Email: surveymanagementgroup@cbi.org.uk

Please turn over to complete the questionnaire ▶

Basic data section

Please enter the business activity covered by this return (please refer to the Standard Industrial Classification opposite)

How many employees are covered by this return?

0-25	26-99	100-499	500 and over
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What type of business does your reply cover?

<input type="checkbox"/> single outlet retailing	<input type="checkbox"/> retailers with 2-9 branches	<input type="checkbox"/> retailers with 10+ branches
<input type="checkbox"/> mail order	<input type="checkbox"/> motor trades	<input type="checkbox"/> wholesaling

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

£0-999k	£1-9.9m	£10-24.9m	£25-99.9m	£100-499m	£500m+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SPECIMEN ONLY

Your company details **please complete as fully as possible**

Your name Your position

Company name

Address

Postcode

Telephone Email

CBI classification listing for the distributive trades survey

Please code your response according to your main activity listed below. These codes are taken from the 2007 Standard Industrial Classification published by the Office of National Statistics.

Motor trades

- 45.1 Sale of motor vehicles
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- 45.4 Sale, maintenance and repair of motorcycles and related parts and accessories

Wholesale trade, except of motor vehicles and motorcycles

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- 46.2 Wholesale of agricultural raw materials and live animals
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- 46.44 Wholesale of china and glassware and cleaning materials
- 46.45 Wholesale of perfume and cosmetics
- 46.46 Wholesale of pharmaceutical goods
- 46.47 Wholesale of furniture, carpets and lighting equipment
- 46.48 Wholesale of watches and jewellery
- 46.49 Wholesale of other household goods

Wholesale of information and communication equipment

- 46.5 Wholesale of information and communication equipment

Wholesale of other machinery, equipment and supplies

- 46.61 Wholesale of agricultural machinery, equipment and supplies
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- 47.5 Retail sale of other household equipment in specialised stores
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- 47.53 Retail sale of carpets, rugs, wall and floor coverings in specialised stores
- 47.54 Retail sale of electrical household appliances in specialised stores
- 47.59/1 Retail sale of musical instruments and scores in specialised stores
- 47.59/9 Retail sale of furniture, lighting equipment and other household articles (other than musical instruments) not elsewhere classified, in specialised stores

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- 47.91 Retail sale via mail order houses or via Internet
- 47.99 Other retail sale not in stores, stalls or markets



Financial services survey



The financial services survey (FSS) was first conducted in December 1989, covering ten sectors of UK financial services and six employment size bands. It is completed at chief executive, finance director, accountant, partner, president, vice-president, strategic director, new business director level. This quarterly survey of short and medium-term trends in UK financial services has developed as an authoritative indicator of this fast-growing and most diverse of sectors. In January 2000, the CBI celebrated ten years of conducting this survey with its sponsors at London's Trinity House, and we saw its 20th anniversary in January 2010.

Inception

December 1989.

Sponsorship

The survey is sponsored by PwC, a global professional services firm.

Frequency

Quarterly – conducted every March, June, September and December.

Technical structure

The infrastructure contains a weighting system made up of ten sectors (one of which is broken down further into three sub-sectors) by six employment size groups. This converts to a matrix of 72 individual cells.

Survey period and lead-time to release

Two working weeks are allotted for the survey period, during which questionnaires are returned to the CBI survey management group for processing. The survey is usually sent out during the latter part of the final week of the month. There is a longer lead-time between final data processing and public release to allow for detailed analysis by the CBI and evaluation and comment from the sponsor. The sponsor also enriches the survey by providing specialist sector information from its senior partners.

Sample and response characteristics

The FSS represents around 7% of the total current UK employment within this activity. The survey has a response rate between 90 and 110 respondents covering a significant spectrum from this diverse sector. The survey has a core of some 75-80 companies with the balance made up of irregular participants and companies responding for the first time.

Number of questions and answering times

The survey will take on average seven to ten minutes to complete. It has 25 questions, a number of which have sub-sections, including separate options for general and life insurance companies.

Main question subject areas

The survey covers business optimism, value and volume of business, charges, costs and profitability (including question options for general and life insurance), employment, training, marketing expenditure, investment, prospects and competitiveness. The questions relate to the trend in an economic variable using the percentage balance, subjective questions concerning normality and adequacy, constraint style questions that are not provided by official statistics and expectation questions that allow comparisons with past data and the development of the business cycle.

Key benefits of qualitative business survey data

The survey data builds up a consistent business cycle that can be tracked with official financial intermediation sector statistics. It provides a far more detailed breakdown of activity in UK financial services than is currently available from official sources. The data can be used to formulate short-term forecasts for the UK financial services sector.

Data supply to the European Commission

The Commission does not currently require the supply of separate UK financial services data from the CBI.

Financial services survey

Number 94 March 2013

For office use only:

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Welcome to the CBI/PwC financial services survey. We would like to thank you for your valued support of the survey – providing us with a key insight into financial services conditions. The survey includes special questions on firms’ price inflation and wage growth expectations. Data from these questions will be provided to The Bank of England on a strictly confidential and anonymised basis. If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is Thursday 7 March 2013. Please complete and return your responses to us by this date using our dedicated fax numbers of 020 78361210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK operations only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 Are you more, or less, optimistic than you were three months ago about the overall business situation in your sector?

More	Same	Less
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Value and volume of business

2 Excluding seasonal variations, do you consider that in volume terms:

	Above normal	Normal	Below normal
(a) Your present level of business is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Your present level of business with overseas customers is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months in:

	Past three months				Next three months			
	Up	Same	Down	n/a	Up	Same	Down	n/a
(a) Volume of business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Value* of fee, commission or premium income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Value* of net interest, investment or trading income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Value* of new business (life insurance companies only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*in sterling

Sponsored by:



Please complete and return to the CBI survey management group by Thursday 7 March 2013

Marketing expenditure

7 Do you expect to authorise more or less expenditure on marketing activities in the next 12 months than you authorised in the past 12 months?

More	Same	Less	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Capital expenditure

8 Do you expect to authorise more or less capital expenditure in the next 12 months than you authorised in the past 12 months on?

	More	Same	Less	n/a
(a) Land and buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Vehicles, plant and machinery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Information technology*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Including software, hardware, personnel and any other expenses related to information technology

9 What are the main reasons for any expected capital expenditure authorisation over the next 12 months? If you tick more than one factor it would be helpful if you could rank them in order of importance, where 1 = most important.

To provide new services	<input type="text"/>
To increase efficiency/speed	<input type="text"/>
To reach new customers	<input type="text"/>
For replacement	<input type="text"/>
To expand capacity	<input type="text"/>
Statutory legislation and regulation	<input type="text"/>
Other (please specify)	<input type="text"/>

10 What factors are likely to limit (wholly or partly) your capital expenditure authorisations over the next 12 months? If you tick more than one factor it would be helpful if you could rank them in order of importance, where 1 = most important.

Inadequate net return on proposed investment	<input type="text"/>
Shortage of finance	<input type="text"/>
Cost of finance	<input type="text"/>
Uncertainty about demand/business prospects	<input type="text"/>
Shortage of labour including managerial and supervisory staff	<input type="text"/>
Other (please specify)	<input type="text"/>

Business prospects

11 What factors are likely to limit your ability to increase your level of business over the next 12 months? Please tick the most important factor or feature. If you tick more than one factor or feature, it would be helpful if you could rank them in order of importance, where 1 = most important.

	Total business	Business with overseas customers
Level of demand	<input type="text"/>	<input type="text"/>
Staff turnover	<input type="text"/>	<input type="text"/>
Availability of professional staff	<input type="text"/>	<input type="text"/>
Availability of clerical staff	<input type="text"/>	<input type="text"/>
Adequacy of systems capacity	<input type="text"/>	<input type="text"/>
Ability to raise funds	<input type="text"/>	<input type="text"/>
of which:		
Ability to raise capital	<input type="text"/>	<input type="text"/>
Availability of wholesale funds	<input type="text"/>	<input type="text"/>
Competition	<input type="text"/>	<input type="text"/>
Statutory legislation and regulation	<input type="text"/>	<input type="text"/>
Other (please specify)	<input type="text"/>	<input type="text"/>

11.1 What do you expect to spend on regulatory compliance in the next 12 months compared to the past 12 months?

More	Same	Less	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12 Where do you see your competition coming from in the next 12 months? (if you tick more than one factor, please rank in order of importance, where 1 = most important and 5 = least important)

- | | |
|--------------------------------------------------------------|--------------------------|
| Your sector of financial services | <input type="checkbox"/> |
| Other sectors of financial services | <input type="checkbox"/> |
| Companies currently positioned outside of financial services | <input type="checkbox"/> |
| New entrants | <input type="checkbox"/> |
| Other (please tick and specify) | <input type="checkbox"/> |

Growth

13 Where do you think your growth will come from over the next 3 months? (Please tick as appropriate)

- | | |
|----------------------------------------|--------------------------|
| Cross sales to new customers | <input type="checkbox"/> |
| Cross sales to existing customers | <input type="checkbox"/> |
| Acquisition of domestic customers | <input type="checkbox"/> |
| Acquisition of international customers | <input type="checkbox"/> |
| New products | <input type="checkbox"/> |
| No growth expected | <input type="checkbox"/> |

14 Relative to the past 12 months, how important do you think the following elements will be to your organisation's growth strategy over the next 12 months?

Organic growth activities

- | | More important | About the same | Less important | n/a |
|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Acquiring new customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cross-selling to existing customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Retaining existing customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Launching new products/services | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Inorganic growth activities

- | | | | | |
|------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Engaging in M&A transactions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Forming strategic partnerships/alliances | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Market focus for growth

- | | | | | |
|--------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Increasing market share in domestic markets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Increasing market share in international markets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Investment in enablers to growth

- | | | | | |
|-------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Brand and advertising | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sales forces and distribution channels | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| CRM/marketing capabilities (eg pricing, segmentation, profitability analysis) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Performance measurement processes/tools | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| IT systems and applications | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

15 What has been the percentage change over the past 12 months in the general level of selling prices in the UK markets that your firm competes in and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change					
	-4.1% to -5%	-3.1% to -4%	-2.1% to -3%	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%	
Past 12 months	<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"/>	
Next 12 months	<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"/>	
Other (please specify % +/-)	Past 12 months <input type="text"/>					%	Next 12 months <input type="text"/>					%

16 What has been the percentage change over the past 12 months in your firm's own average selling price/commissions/fees/charges in UK markets and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change					
	-4.1% to -5%	-3.1% to -4%	-2.1% to -3%	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%	
Past 12 months	<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"/>	
Next 12 months	<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"/>	
Other (please specify % +/-)	Past 12 months <input type="text"/>					%	Next 12 months <input type="text"/>					%

17 What has been the percentage change over the past 12 months in your firm's wage/salary cost per person employed (including overtime and bonuses) and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change		No change	Positive percentage change								
	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%	5.1% to 6%	6.1% to 7%	7.1% to 8%	
Past 12 months	<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"/>	<input type="checkbox"/>
Next 12 months	<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"/>	<input type="checkbox"/>
Other (please specify % +/-)	Past 12 months <input type="text"/>				%	Next 12 months <input type="text"/>				%		

Consumer debt

18 What has been the trend over the past three months and what is the expected trend over the next three months with regard to volumes of new unsecured consumer loan approvals?

Past three months				Next three months			
Up	Same	Down	n/a	Up	Same	Down	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19 What has been the trend over the past three months and what is the expected trend over the next three months with regard to delinquency (ie loans in arrears) for unsecured consumer lending?

Past three months				Next three months			
Up	Same	Down	n/a	Up	Same	Down	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Financial market conditions

Please indicate the following:

20 What do you consider to be the likelihood of further deterioration in financial market conditions over the next six months? (please select one only)

Low likelihood

Medium likelihood

High likelihood

21 How soon do you expect 'normal' financial market conditions (in terms of volatility/liquidity/credit margins) to resume? (please select one only)

Within three months

Within six months

Beyond six months

22 Are changes in regulation resulting in a more or less competitive UK financial services centre?

More competitive	No change	Less competitive
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Basic data section

How many employees are covered by this return? (please tick one box only)

- (a) 1 – 49
 (b) 50 – 199
 (c) 200 – 499
 (d) 500 – 1,999
 (e) 2,000 – 4,999
 (f) 5,000 and over

Please indicate the nature of the business covered by this return (please tick one box only)

- (a) Banking
 (b) Finance houses and other lending institutions
 (c) Building societies
 (d) General insurance
 (e) Life insurance
 (f) Insurance brokers
 (g) Investment management (including pension funds, unit trusts and investment trusts):
 Fund management
 Pension funding
 Trusts, funds and similar financial entities
 (h) Securities trading/stockbroking
 (i) Private equity
 (j) Other financial institutions



Your company details **please complete as fully as possible**

Your name

Your position

Company name

Address

Postcode

Telephone

Email

Service sector survey

Developed in November 1998 for the UK and in 2002 for the European Commission, the service sector survey (SSS) is the newest of the CBI's portfolio of business surveys. It covers 40 sectors of the UK service activity and is completed at chairman, chief executive, partner, consultant, finance director and sales director level. It provides data on the most homogeneous component of UK private sector activity – the fastest developing economic sector – and celebrates its 15th anniversary in 2013.

Inception

Monthly and quarterly both developed in December 1998.

Sponsorship

The SSS was sponsored by professional services firm Deloitte & Touche from 1998 to 2001 and then by Grant Thornton from 2002-09, but is not currently sponsored.

Frequency

Quarterly – conducted every February, May, August and November.

Monthly – conducted every January, March, April, June, July, September, October and December.

Range of economic activity covered

The survey covers the aggregated data from 40 sectors to form statistics for three aggregate groups – consumer, business and professional services. These sectors add up to 38% of GDP.

The very broad range of activity is highlighted by the fact that the survey covers a wide spectrum of the UK service industry including management consultants and accountants, bar chains, contract cleaning, market research and tour operators.

Technical structure

The data is weighted using two sets of weights which are then combined into a table, the first comprising of 40 sectors which are weighted according to the gross value added (GVA). The weighted data is then aggregated in to three main groups (consumer, business and professional services). Business and professional services are then further aggregated in to one singular group.

The second weights involve the data being weighted according to the employment size of the individual firms. This is then applied across to 40 sectors accordingly, from nine size bands to three aggregated size bands (0-499, 500-4,999, 5,000 and over), allowing us to deliver employee-weighted data.

Survey period and lead-time to release

Two and a half working weeks are allotted for the survey period, during which completed questionnaires are returned to the CBI survey management group. The survey is sent out during the last week of the month. The analysed data is usually released within a working week after the processing of the data every quarter.

Response characteristics

The survey has an average response rate of around 165 companies. The survey has a core of some 155 companies with the balance made up of irregular participants and companies who respond for the first time.

Number of questions and answering times

The monthly survey has six questions and the quarterly survey has 14 questions, a number of which have sub-sections. The monthly survey takes two minutes to complete and the quarterly around five minutes. The quarterly questionnaire contains a new question on capacity on behalf of the European Commission.

Main question subject areas

The survey covers a broad range of macro-economic issues such as business optimism, value and volume of business, charges, costs and profitability, employment and training, investment, business prospects, competitiveness and capacity, and the main reasons for investment.

The questions relate to the trend in an economic variable using the percentage balance. There are also subjective questions concerning normality and adequacy, constraint-style questions not provided by official statistics and expectation questions that allow comparisons with past data and the development of the business cycle.

Key benefits of qualitative business survey data

This survey is fast building a consistent business cycle that can be tracked with official statistics and used for extensive key business research. It provides an accurate picture of perceptions and expectations which allows the business community a sound basis for evaluating the current situation and future strategic decision making.

Data supply to the European Commission

The Commission has received the monthly and quarterly survey data for nearly 11 years. Initially started as a pilot in September 2002, the data was incubated for a full year before being publically released in 2003. The CBI receives an annual financial grant from the Commission for supply of this data.



In the event of industrial action by postal workers, please fax your response to the usual dedicated numbers below.

For office use only:

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Service sector survey Number 82 December 2012

Welcome to the CBI monthly service sector survey. We would like to thank you for your valued support of the survey – providing us with a key insight into service sector conditions.

If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is **Wednesday 12 December 2012**. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK services only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 Excluding seasonal variations, do you consider that in volume terms, your present level of business – ie business situation – is:

Above normal Normal Below normal

2 Excluding seasonal variations, what has been the trend over the past three months with regard to your volume of business – ie demand?

Up Same Down n/a

3 Excluding seasonal variations, what are the expected trends for the next three months with regard to your volume of business – ie demand?

Up Same Down n/a

4 Excluding seasonal variations, what has been the trend over the past three months with regard to numbers employed?

Up Same Down n/a

5 Excluding seasonal variations, what are the expected trends for the next three months with regard to numbers employed?

Up Same Down n/a

6 Excluding seasonal variations, what are the expected trends for the next three months with regard to average selling prices?

Up Same Down n/a

Please complete and return to the
CBI survey management group by **Wednesday 12 December 2012**

Basic data section

Please complete as fully as possible. All information submitted will be handled in the strictest confidence.

How many employees are covered by this return? (please answer on behalf of your UK operation only)

1-9 10-19 20-49 50-99 100-199 200-499 500-4,999 5,000-19,999 20,000+

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

up to £49k £50-99k £100-249k £250-499k £500-999k
 £1-4.99m £5-9.99m £10-19.99m £20-99.99m £100-499m £500m+

Please indicate the main business activity code covered by this return (please refer to the separate SIC sheet).

Please specify your business activity below if you are unsure of your SIC code.

Please indicate the type of organisation covered by this return

Enterprise * Subsidiary * Business unit * Other (please tick and specify)

* **Enterprise:** the total company, which may comprise several subsidiary companies

* **Subsidiary:** a legal entity, where the majority or all the shares are owned by a parent/holding company

* **Business unit:** a unit site, factory or part of a company with clearly defined responsibility as a profit centre

Please indicate the main UK region covered by this return (please refer to the regional code list on the separate sheet)

Thankyou for completing this survey.

Comments



Your company details please complete as fully as possible

Your name

Your position

Company name

Address

Postcode

Telephone

Email

Confidential

**In the event of industrial action by postal workers,
please fax your response to the usual dedicated numbers below.**

For office use only:

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Service sector survey Number 83 January 2013

Welcome to the CBI service sector survey. We would like to thank you for your valued support of the survey – providing us with a key insight into service sector conditions. The survey includes special questions on firms’ price inflation and wage growth expectations. Data from these questions will be provided to The Bank of England on a strictly confidential and anonymised basis. If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is Wednesday 16 January 2013. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK services operations only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 Excluding seasonal variations, do you consider that in volume terms, your present level of business – ie business situation – is:

Above normal Normal Below normal

2 Excluding seasonal variations, what has been the trend over the past three months with regard to your volume of business – ie demand?

Up Same Down n/a

3 Excluding seasonal variations, what are the expected trends for the next three months with regard to your volume of business – ie demand?

Up Same Down n/a

4 Excluding seasonal variations, what has been the trend over the past three months with regard to numbers employed?

Up Same Down n/a

5 Excluding seasonal variations, what are the expected trends for the next three months with regard to numbers employed?

Up Same Down n/a

6 Excluding seasonal variations, what are the expected trends for the next three months with regard to average selling prices?

Up Same Down n/a

7 What factors are currently limiting your business? (please tick all appropriate boxes)

- | | |
|--------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Insufficient demand | <input type="checkbox"/> Financial constraints (either shortage of internal finance or inability to raise external finance) |
| <input type="checkbox"/> Shortage of labour (including managerial/supervisory staff) | <input type="checkbox"/> Other limiting factors |
| <input type="checkbox"/> Shortage of space/equipment (systems capacity) | <input type="checkbox"/> No limiting factors at present |

Please complete and return to the
CBI survey management group by Wednesday 16 January 2013

8 What has been the percentage change over the past 12 months in the general level of selling prices in the UK markets that your firm competes in and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change				
	-4.1% to -5%	-3.1% to -4%	-2.1% to -3%	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%
Past 12 months	<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"/>
Next 12 months	<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"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %					Next 12 months <input type="text"/> %					

9 What has been the percentage change over the past 12 months in your firm's own average selling price/commissions/fees/charges in UK markets and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change					No change	Positive percentage change				
	-4.1% to -5%	-3.1% to -4%	-2.1% to -3%	-1.1% to -2%	-0.1% to -1%		0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%
Past 12 months	<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"/>
Next 12 months	<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"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %					Next 12 months <input type="text"/> %					

10 What has been the percentage change over the past 12 months in your firm's wage/salary cost per person employed (including overtime and bonuses) and what is expected to occur over the next 12 months? (please tick one box only on each line)

	Negative percentage change			No change	Positive percentage change							
	-1.1% to -2%	-0.1% to -1%			0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%	5.1% to 6%	6.1% to 7%	7.1% to 8%
Past 12 months	<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"/>	<input type="checkbox"/>
Next 12 months	<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"/>	<input type="checkbox"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %					Next 12 months <input type="text"/> %						

11 If demand expanded, could you increase your volume of activity* with your present resources? (* ie volume of business)

Yes No

If so – by how much? %

Basic data section Please complete as fully as possible. All information submitted will be handled in the strictest confidence.

How many employees are covered by this return? (please answer on behalf of your UK operation only)

1-9 10-19 20-49 50-99 100-199 200-499 500-4,999 5,000-19,999 20,000+

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

up to £49k £50-99k £100-249k £250-499k £500-999k
 £1-4.99m £5-9.99m £10-19.99m £20-99.99m £100-499m £500m+

Please indicate the main business activity code covered by this return.

Please specify your business activity below if you are unsure of your SIC code.

Please indicate the type of organisation covered by this return

Enterprise * Subsidiary * Business unit * Other (please tick and specify)

* **Enterprise:** the total company, which may comprise several subsidiary companies

* **Subsidiary:** a legal entity, where the majority or all the shares are owned by a parent/holding company

* **Business unit:** a unit site, factory or part of a company with clearly defined responsibility as a profit centre

Please indicate the main UK region covered by this return

(please refer to the regional code list on the rear of this questionnaire)

Your company details please complete as fully as possible

Your name	Your position
Company name	
Address	
	Postcode
Telephone	Email

The CBI acknowledges the European Union's financial support for this survey

Classification listing for the service sector survey

Please code your response according to your main activity listed below. These codes are taken from the 2007 Standard Industrial Classification published by the Office of National Statistics.

Land transport and transport via pipelines

- 49.1 Passenger rail transport, interurban
- 49.2 Freight rail transport
- 49.3 Other passenger land transport – eg bus, coach, taxi plus urban and suburban rail
- 49.4 Freight transport by road and removal services
- 49.5 Transport via pipeline

Water transport

- 50.1 Sea and coastal passenger water transport
- 50.2 Sea and coastal freight water transport
- 50.3 Inland passenger water transport
- 50.4 Inland freight water transport

Air transport

- 51.1 Passenger air transport
- 51.2 Freight air transport and space transport

Warehousing and support activities for transportation

- 52.1 Warehousing and storage
- 52.2 Support activities for transportation

Postal and courier activities

- 53.1 Postal activities under universal service obligation
- 53.2 Other postal and courier activities

Accommodation

- 55.1 Hotels and similar accommodation
- 55.2 Holiday and other short-stay accommodation
- 55.3 Camping grounds, recreational vehicle parks and trailer parks
- 55.9 Other accommodation

Food and beverage service activities

- 56.1 Restaurants and mobile food service activities
- 56.2 Event catering and other food service activities
- 56.3 Beverage serving activities

Publishing activities

- 58.1 Publishing of books, periodicals and other publishing activities
- 58.2 Software publishing

Motion picture, video and television programme production, sound recording and music publishing activities

- 59.1 Motion picture, video and television programme activities
- 59.2 Sound recording and music publishing activities

Programming and broadcasting activities

- 60.1 Radio broadcasting
- 60.2 Television programming and broadcasting activities

Telecommunications

- 61.1 Wired telecommunications activities
- 61.2 Wireless telecommunications activities
- 61.3 Satellite telecommunications activities
- 61.9 Other telecommunications activities

Computer programming, consultancy and related activities

- 62.01 Computer programming activities
- 62.02 Computer consultancy activities
- 62.03 Computer facilities management activities
- 62.09 Other information technology and computer service activities

Information service activities

- 63.1 Data processing, hosting and related activities, web portals
- 63.11 Data processing, hosting and related activities
- 63.12 Web portals
- 63.9 Other information service activities

Real estate activities

- 68.1 Buying and selling of own real estate
- 68.2 Renting and operating of own or leased real estate
- 68.3 Real estate activities on a fee or contract basis

Legal and accounting activities

- 69.1 Legal activities
- 69.2 Accounting, bookkeeping and auditing activities, tax consultancy

Activities of head offices, management consultancy activities

- 70.1 Activities of head offices
- 70.2 Management consultancy activities

Architectural and engineering activities; technical testing and analysis

- 71.1 Architectural and engineering activities and related technical consultancy
- 71.2 Technical testing and analysis

Scientific research and development

- 72.1 Research and experimental development on natural sciences and engineering
- 72.2 Research and experimental development on social sciences and humanities

Advertising and market research

- 73.1 Advertising
- 73.2 Market research and public opinion polling

Other professional, scientific and technical activities

- 74.1 Specialised design activities
- 74.2 Photographic activities
- 74.3 Translation and interpretation activities
- 74.9 Other professional, scientific and technical activities not elsewhere classified

Veterinary activities

- 75.0 Veterinary activities

Renting and leasing activities

- 77.1 Renting and leasing of motor vehicles
- 77.2 Renting and leasing of personal and household goods
- 77.3 Renting and leasing of other machinery, equipment and tangible goods
- 77.4 Leasing of intellectual property and similar products, except copyrighted works

Employment activities

- 78.1 Activities of employment placement agencies
- 78.2 Temporary employment agency activities
- 78.3 Other human resources provision

Travel agency, tour operator reservation service and related activities

- 79.1 Travel agency and tour operator activities
- 79.11 Travel agency activities
- 79.12 Tour operator activities
- 79.9 Other reservation service and related activities

Security and investigation activities

- 80.1 Private security activities
- 80.2 Security systems service activities
- 80.3 Investigation activities

Services to buildings and landscape activities

- 81.1 Combined facilities support activities
- 81.2 Cleaning activities
- 81.3 Landscape service activities

Office administrative, office support and other business support activities

- 82.1 Office administrative and support activities
- 82.2 Activities of callcentres
- 82.3 Organisation of conventions and trade shows
- 82.9 Business support service activities not elsewhere classified

Residential care activities

- 87 Residential care activities

Creative, arts and entertainment activities

- 90.0 Creative, arts and entertainment activities

Libraries, archives, museums and other cultural activities

- 91.01 Library and archives activities
- 91.02 Museums activities
- 91.03 Operation of historical sites and buildings and similar visitor attractions
- 91.04 Botanical and zoological gardens and nature reserves activities

Gambling and betting activities

- 92.0 Gambling and betting activities

Sports activities and amusement and recreation activities

- 93.1 Sports activities
- 93.11 Operation of sports facilities
- 93.12 Activities of sport clubs
- 93.13 Fitness facilities
- 93.19 Other sports activities
- 93.2 Amusement and recreation activities
- 93.21 Activities of amusement parks and theme parks
- 93.29 Other amusement and recreation activities

Activities of membership organisations

- 94.1 Activities of business, employers and professional membership organisations
- 94.2 Activities of trade unions
- 94.9 Activities of other membership organisations

Repair of computers and personal and household goods

- 95.1 Repair of computers and communication equipment
- 95.2 Repair of personal and household goods

Other personal service activities

- 96.01 Washing and (dry-) cleaning of textile and fur products
- 96.02 Hairdressing and other beauty treatment
- 96.03 Funeral and related activities
- 96.04 Physical well-being activities
- 96.09 Other personal service activities not elsewhere classified

Regional codes 1-14**Code 1****Wales (counties)**

- Flintshire
- Gwent
- Gwynedd
- Mid Glamorgan
- Powys
- South Glamorgan
- West Glamorgan

Code 2**Scotland (L A region)**

- Borders
- Central
- Dumfries & Galloway
- Fife
- Grampian
- Highland
- Lothian
- Strathclyde
- Tayside
- Islands

Code 3**Northern Ireland (borders)**

- Belfast
- South Eastern
- Southern
- North Eastern
- Western

Code 4**North East**

- Cleveland
- Durham
- Northumberland
- Tyne & Wear

Code 5**North West**

- Cumbria
- Cheshire
- Greater Manchester
- Lancashire

Code 6**Merseyside**

- Merseyside

Code 7**Yorkshire & the Humber**

- Humberside
- North Yorkshire
- South Yorkshire
- West Yorkshire

Code 8**East Midlands**

- Derbyshire
- Leicestershire
- Lincolnshire
- Northamptonshire
- Nottinghamshire

Code 9**West Midlands**

- Hereford & Worcester
- Shropshire
- Staffordshire
- Warwickshire
- West Midlands (met. county)

Code 10**South West**

- Bath & North East Somerset
- City of Bristol
- North Somerset
- South Gloucestershire
- Cornwall
- Devon
- Dorset
- Gloucestershire
- Somerset
- Wiltshire

Code 11**East of England**

- Norfolk
- Suffolk
- Bedfordshire
- Cambridgeshire
- Essex
- Hertfordshire

Code 12**South East**

- Berkshire
- Buckinghamshire
- East Sussex
- Hampshire
- Isle of Wight
- Kent
- Oxfordshire
- Surrey
- West Sussex

Code 13**London**

- Greater London

Code 14**Whole UK**

In the event of industrial action by postal workers, please fax your response to the usual dedicated numbers below.

Service sector survey Number 58 February 2013

For office use only:

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Welcome to the CBI quarterly service sector survey.

We would like to thank you for your valued support of the survey – providing us with a key insight into service sector conditions.

If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is **Wednesday 13 February 2013**. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK services activities only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 Are you more, or less, optimistic than you were three months ago about the general business situation in your sector?

more same less

2 Excluding seasonal variations, do you consider that in value terms, your present level of business is:

above normal normal below normal

2a Excluding seasonal variations, do you consider that in volume terms, your present level of business is:

above normal normal below normal

Value and volume of business

3 Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months with regard to:

Value of business
trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

3a Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months with regard to:

Volume of business
trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

Please complete and return to the
CBI survey management group by **Wednesday 13 February 2013**

4 Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months with regard to:

a) The value of business with customers in the UK market

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

b) The value of business with overseas-based customers in other EU markets

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

c) The value of business with overseas-based customers in non-EU markets

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

Charges, costs and profitability

5 Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months with regard to:

a) Average selling prices

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

b) Average commissions/fees/charges

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

c) Total costs per person employed

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

d) Overall profitability of business

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

Employment and training

6 Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months with regard to:

a) Numbers employed

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

of which:

Full-time

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

Part-time

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

b) Training/retraining expenditure

trend over the past three months

up same down n/a

trend over the next three months

up same down n/a

Capital expenditure

7 Do you expect to authorise more or less capital expenditure in the next twelve months than you authorised in the past twelve months on:

a) Land and buildings

more same less n/a

b) Information technology *

more same less n/a

c) Vehicles, plant and machinery

more same less n/a

* Including hardware/software/personnel and any other expenses related to IT

8 What are the main reasons for any expected capital expenditure authorisations over the next twelve months?

- | | |
|---------------------------------------------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> To expand capacity | <input type="checkbox"/> To reach new customers |
| <input type="checkbox"/> To increase efficiency/speed/to exploit new technology | <input type="checkbox"/> Euro-related |
| <input type="checkbox"/> For replacement | <input type="checkbox"/> E-business related |
| <input type="checkbox"/> To provide new services | <input type="checkbox"/> Other (please tick and specify) |

9 What factors are likely to limit (wholly or partly) your capital expenditure authorisations over the next twelve months?

- | | |
|-----------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <input type="checkbox"/> Inadequate net return on proposed investment | <input type="checkbox"/> Uncertainty about demand/business prospects |
| <input type="checkbox"/> Shortage of internal finance | <input type="checkbox"/> Shortage of labour
(including managerial/supervisory staff) |
| <input type="checkbox"/> Inability to raise external finance | <input type="checkbox"/> Other (please tick and specify) |
| <input type="checkbox"/> Cost of finance | |

Business prospects

10 Do you expect to expand your business more in the next twelve months than you did over the past twelve months?

yes no n/a

11 What factors are likely to limit your ability to increase your level of business over the next twelve months?

	total business	with overseas customers
Level of demand/sales	<input type="checkbox"/>	<input type="checkbox"/>
Availability of professional staff	<input type="checkbox"/>	<input type="checkbox"/>
Availability of clerical/other staff	<input type="checkbox"/>	<input type="checkbox"/>
Adequacy of systems capacity	<input type="checkbox"/>	<input type="checkbox"/>
Ability to raise funds	<input type="checkbox"/>	<input type="checkbox"/>
Domestic competition	<input type="checkbox"/>	<input type="checkbox"/>
Overseas competition	<input type="checkbox"/>	<input type="checkbox"/>
Other (please tick and specify)	<input type="checkbox"/>	<input type="checkbox"/>

12 How do you consider the competitiveness of your UK-based operation has changed vis-a-vis competitors based overseas/or your own overseas subsidiaries (where relevant)?

a) In UK markets

trend over the past three months

improved no change decreased n/a

trend over the next three months

improve no change decrease n/a

b) In other EU markets

trend over the past three months

improved no change decreased n/a

trend over the next three months

improve no change decrease n/a

c) In non-EU markets

trend over the past three months

improved no change decreased n/a

trend over the next three months

improve no change decrease n/a

Basic data section

Please complete the details below as fully as possible. All information submitted will be handled in the strictest confidence.

How many employees are covered by this return? (please answer on behalf of your UK operation only)

1-9 10-19 20-49 50-99 100-199
 200-499 500-4,999 5,000-19,999 20,000+

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

up to £49k £50-99k £100-249k £250-499k £500-999k
 £1-4.99m £5-9.99m £10-19.99m £20-99.99m £100-499m £500m+

Please indicate the main business activity covered by this return (please refer to the Standard Industrial Classification on pages 5 and 6 of the questionnaire). Please specify your business activity below, if you are unsure of your SIC code.

Please indicate the type of organisation covered by this return

enterprise * subsidiary * business unit * other (please tick and specify)

* *Enterprise*: the total company, which may comprise several subsidiary companies

* *Subsidiary*: a legal entity, where the majority or all the shares are owned by a parent/holding company

* *Business unit*: a unit site, factory or part of a company with clearly defined responsibility as a profit centre

Please indicate the main UK region covered by this return (please refer to the regional code list on the rear of this questionnaire)

Your company details please complete as fully as possible

Your name Your position

Company name

Address

Postcode

Telephone Email

Classification listing for the service sector survey

Please code your response according to your main activity listed below. These codes are taken from the 2007 Standard Industrial Classification published by the Office of National Statistics.

Land transport and transport via pipelines

- 49.1 Passenger rail transport, interurban
- 49.2 Freight rail transport
- 49.3 Other passenger land transport – eg bus, coach, taxi plus urban and suburban rail
- 49.4 Freight transport by road and removal services
- 49.5 Transport via pipeline

Water transport

- 50.1 Sea and coastal passenger water transport
- 50.2 Sea and coastal freight water transport
- 50.3 Inland passenger water transport
- 50.4 Inland freight water transport

Air transport

- 51.1 Passenger air transport
- 51.2 Freight air transport and space transport

Warehousing and support activities for transportation

- 52.1 Warehousing and storage
- 52.2 Support activities for transportation

Postal and courier activities

- 53.1 Postal activities under universal service obligation
- 53.2 Other postal and courier activities

Accommodation

- 55.1 Hotels and similar accommodation
- 55.2 Holiday and other short-stay accommodation
- 55.3 Camping grounds, recreational vehicle parks and trailer parks
- 55.9 Other accommodation

Food and beverage service activities

- 56.1 Restaurants and mobile food service activities
- 56.2 Event catering and other food service activities
- 56.3 Beverage serving activities

Publishing activities

- 58.1 Publishing of books, periodicals and other publishing activities
- 58.2 Software publishing

Motion picture, video and television programme production, sound recording and music publishing activities

- 59.1 Motion picture, video and television programme activities
- 59.2 Sound recording and music publishing activities

Programming and broadcasting activities

- 60.1 Radio broadcasting
- 60.2 Television programming and broadcasting activities

Telecommunications

- 61.1 Wired telecommunications activities
- 61.2 Wireless telecommunications activities
- 61.3 Satellite telecommunications activities
- 61.9 Other telecommunications activities

Computer programming, consultancy and related activities

- 62.01 Computer programming activities
- 62.02 Computer consultancy activities
- 62.03 Computer facilities management activities
- 62.09 Other information technology and computer service activities

Information service activities

- 63.1 Data processing, hosting and related activities, web portals
- 63.11 Data processing, hosting and related activities
- 63.12 Web portals
- 63.9 Other information service activities

Real estate activities

- 68.1 Buying and selling of own real estate
- 68.2 Renting and operating of own or leased real estate
- 68.3 Real estate activities on a fee or contract basis

Legal and accounting activities

- 69.1 Legal activities
- 69.2 Accounting, bookkeeping and auditing activities, tax consultancy

Activities of head offices, management consultancy activities

- 70.1 Activities of head offices
- 70.2 Management consultancy activities

Architectural and engineering activities; technical testing and analysis

- 71.1 Architectural and engineering activities and related technical consultancy
- 71.2 Technical testing and analysis

Scientific research and development

- 72.1 Research and experimental development on natural sciences and engineering
- 72.2 Research and experimental development on social sciences and humanities

Advertising and market research

- 73.1 Advertising
- 73.2 Market research and public opinion polling

Other professional, scientific and technical activities

- 74.1 Specialised design activities
- 74.2 Photographic activities
- 74.3 Translation and interpretation activities
- 74.9 Other professional, scientific and technical activities not elsewhere classified

Veterinary activities

- 75.0 Veterinary activities

Renting and leasing activities

- 77.1 Renting and leasing of motor vehicles
- 77.2 Renting and leasing of personal and household goods
- 77.3 Renting and leasing of other machinery, equipment and tangible goods
- 77.4 Leasing of intellectual property and similar products, except copyrighted works

Employment activities

- 78.1 Activities of employment placement agencies
- 78.2 Temporary employment agency activities
- 78.3 Other human resources provision

Travel agency, tour operator reservation service and related activities

- 79.1 Travel agency and tour operator activities
- 79.11 Travel agency activities
- 79.12 Tour operator activities
- 79.9 Other reservation service and related activities

Security and investigation activities

- 80.1 Private security activities
- 80.2 Security systems service activities
- 80.3 Investigation activities

Services to buildings and landscape activities

- 81.1 Combined facilities support activities
- 81.2 Cleaning activities
- 81.3 Landscape service activities

Office administrative, office support and other business support activities

- 82.1 Office administrative and support activities
- 82.2 Activities of callcentres
- 82.3 Organisation of conventions and trade shows
- 82.9 Business support service activities not elsewhere classified

Residential care activities

- 87 Residential care activities

Creative, arts and entertainment activities

- 90.0 Creative, arts and entertainment activities

Libraries, archives, museums and other cultural activities

- 91.01 Library and archives activities
- 91.02 Museums activities
- 91.03 Operation of historical sites and buildings and similar visitor attractions
- 91.04 Botanical and zoological gardens and nature reserves activities

Gambling and betting activities

- 92.0 Gambling and betting activities

Sports activities and amusement and recreation activities

- 93.1 Sports activities
- 93.11 Operation of sports facilities
- 93.12 Activities of sport clubs
- 93.13 Fitness facilities
- 93.19 Other sports activities
- 93.2 Amusement and recreation activities
- 93.21 Activities of amusement parks and theme parks
- 93.29 Other amusement and recreation activities

Activities of membership organisations

- 94.1 Activities of business, employers and professional membership organisations
- 94.2 Activities of trade unions
- 94.9 Activities of other membership organisations

Repair of computers and personal and household goods

- 95.1 Repair of computers and communication equipment
- 95.2 Repair of personal and household goods

Other personal service activities

- 96.01 Washing and (dry-) cleaning of textile and fur products
- 96.02 Hairdressing and other beauty treatment
- 96.03 Funeral and related activities
- 96.04 Physical well-being activities
- 96.09 Other personal service activities not elsewhere classified

Regional codes 1-14**Code 1****Wales (counties)**

- Flintshire
- Gwent
- Gwynedd
- Mid Glamorgan
- Powys
- South Glamorgan
- West Glamorgan

Code 2**Scotland (L A region)**

- Borders
- Central
- Dumfries & Galloway
- Fife
- Grampian
- Highland
- Lothian
- Strathclyde
- Tayside
- Islands

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- Southern
- North Eastern
- Western

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- Northumberland
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- Cheshire
- Greater Manchester
- Lancashire

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- Merseyside

Code 7**Yorkshire & the Humber**

- Humberside
- North Yorkshire
- South Yorkshire
- West Yorkshire

Code 8**East Midlands**

- Derbyshire
- Leicestershire
- Lincolnshire
- Northamptonshire
- Nottinghamshire

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- Staffordshire
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- North Somerset
- South Gloucestershire
- Cornwall
- Devon
- Dorset
- Gloucestershire
- Somerset
- Wiltshire

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- Norfolk
- Suffolk
- Bedfordshire
- Cambridgeshire
- Essex
- Hertfordshire

Code 12**South East**

- Berkshire
- Buckinghamshire
- East Sussex
- Hampshire
- Isle of Wight
- Kent
- Oxfordshire
- Surrey
- West Sussex

Code 13**London**

- Greater London

Code 14**Whole UK**

Thankyou for completing the survey



Investment intentions survey

The investment intentions survey (IIS) is conducted exclusively for the European Commission on a twice-a-year basis, covering European Commission NACE sectors of the UK manufacturing industry. The survey is sent to the identical sample that responds to the industrial trends survey. Data is then supplied exclusively to the European Commission and not published independently by the CBI, but can be found in the Commission's economic supplement.

Inception

Before the CBI took over its operation in 1987 the survey had been conducted on behalf of the European Commission by the Business Statistics Office, one of the forerunners of the current Office for National Statistics (ONS).

Frequency

Twice a year – conducted in March and November (despatched at the same time as the March and November monthly industrial trends survey).

Range of economic activity covered

UK manufacturing and processing industries. Although its survey sample is identical to that of the industrial trends survey, it is an exclusive supply product and the stratification of the industry sectors reported on is different to the main manufacturing survey. The survey provides aggregated data for basic materials, equipment, goods, extractive industries, food industry (including drink and tobacco), metal working and processing industries. Data is also derived for three employment size bands and total manufacturing investment including and excluding extractive industries. The CBI produces data according to the main industrial trends survey structure for its own internal research.

Technical structure

The survey infrastructure is based entirely on the weighting system for the quarterly and monthly industrial trends survey of UK manufacturing.

Survey period and lead-time to release

The survey is despatched at the same time as the questionnaires for the March and November monthly industrial trends survey. Two and a half working weeks are allotted for the survey period, and processed by survey management group. The analysed data is usually processed during the end of the month in question with electronic supply to the European Commission by the start of the following month. The data is analysed by the Commission's Directorate General ii-Economic and Financial Affairs.

Survey sample and response characteristics

This survey uses the industrial trends survey sample and receives an average response of around 300 replies. This is around 65% of the average response to the normal quarterly or monthly industrial trends survey and as such does provide a robust measurement of investment activity in UK manufacturing. The survey response is based on a core of the main sample and is generally a good mix of the small, medium and large companies.

Number of questions and answering times

There are two questions in the March survey and four questions in the November survey. A number of these questions have sub-sections. The survey generally takes around five minutes to complete. The purpose of investment section requires a level of quantitative detail that may require internal consultation by the participant beyond the norm expected for CBI business surveys. This may increase the overall completion time.

Main question subject areas

The survey is split into three main sections. Purpose of investment seeks information about replacement and extension of production capacity, rationalisation and other aims. This section requires percentages for the proportion of investment undertaken over the current year and the past two years. The 'factors influencing investment' section concerns current and expected influences on investment for the current and next year. The percentage change in the value of investment asks for comparisons with the previous two years. In November, the percentage change in the value of investment is required for next year in comparison to the current year.

Key benefits of qualitative business survey data

It builds up a consistent business cycle of harmonised information that provides the European Union with a robust twice-a-year analysis of manufacturing investment for the UK. It is vital for comparison purposes with the investment experience of other member states. The survey data presents a solid mix of quantitative and qualitative data, providing a comprehensive picture of both perceptions and expectations and actual percentage changes in investment undertaken.

Data supply to the European Commission

Data derived from the survey has been provided exclusively to the European Commission since 1987. The CBI receives an annual financial grant from the EC for supply of this data.



Confidential



In the event of industrial action by postal workers, please fax your response to the usual dedicated numbers below.

Investment intentions survey
Number 51 November 2012

For office use only: [] [] [] [] [] [] [] []

Welcome to the CBI/European Commission twice-yearly investment intentions survey. We would like to thank you for your valued support of the survey – providing us with a key insight into manufacturing investment conditions.

The closing date for this survey is Wednesday 14 November 2012. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK manufacturing activities only.

If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 The purpose of investment (please indicate in percentage terms the proportion of investment undertaken for each of the following reasons)

Table with 2 columns: 2012, 2013. Rows: a) Replacement of production capacity, b) Extension of production capacity, c) Rationalisation, d) Other aims (safety, pollution control etc)

2 Factors influencing investment (please tick one box for each of the options below)

a) Factors known to have influenced investment in 2012

Table with 7 columns: 2012, Very stimulating, Stimulating, No influence, Limiting, Very limiting, No answer. Rows: Demand, Financial resources or expected profits, Technical factors, Other factors

b) Factors expected to influence investment in 2013

Table with 7 columns: 2013, Very stimulating, Stimulating, No influence, Limiting, Very limiting, No answer. Rows: Demand, Financial resources or expected profits, Technical factors, Other factors

Please turn over to complete the basic data section

Please complete and return to the CBI survey management group by Wednesday 14 November 2012

3 Please indicate the percentage change in the value of investment* undertaken/authorised this year by your company, compared with the investment last year. Please tick one box only for each year

	Positive percentage change										No change		Negative percentage change											
	0.1 to 4	4.1 to 8	8.1 to 12	12.1 to 16	16.1 to 20	20.1 to 24	24.1 to 28	28.1 to 32	32.1 to 36	36.1 to 40	>40		-0.1 to -4	-4.1 to -8	-8.1 to -12	-12.1 to -16	-16.1 to -20	-20.1 to -24	-24.1 to -28	-28.1 to -32	-32.1 to -36	-36.1 to -40	>-40	
2011	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
2012	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Please indicate the expected percentage change in the value of investment* undertaken/authorised by your company for next year, compared with this year. Please tick one box only for each year

	Positive percentage change										No change		Negative percentage change											
	0.1 to 4	4.1 to 8	8.1 to 12	12.1 to 16	16.1 to 20	20.1 to 24	24.1 to 28	28.1 to 32	32.1 to 36	36.1 to 40	>40		-0.1 to -4	-4.1 to -8	-8.1 to -12	-12.1 to -16	-16.1 to -20	-20.1 to -24	-24.1 to -28	-28.1 to -32	-32.1 to -36	-36.1 to -40	>-40	
2012	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
2013	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Investment is defined as any authorised expenditure including plant and machinery, vehicles, buildings, leasing of fixed assets, innovation and information technology (which includes software, hardware, personnel and other IT-related expenses. This definition excludes marketing and training expenditure)

Basic data section

Please enter here the SIC code number of the main manufacturing activity covered by this return

How many employees are covered by this return?

0-49	50-99	100-199	200-249	250-499	500-999	1000-4999	5000+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is the annual ex-works value of your direct exports?

nil-£75k	£75k-£1m	£1m-£3m	£3m-£8m	£8m-£15m	£15m-£25m	£25m-£40m	£40m-£60m	£60m-£100m	£100m-£150m	over £150m
<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"/>

Comments

Thankyou for supporting this survey

The CBI supplies the European Commission with harmonised manufacturing investment data derived from this survey.
The CBI acknowledges the European Union's financial support for the technical development and supply of this data.



Your company details please complete as fully as possible

Your name Your position

Company name

Address

Postcode

Telephone Email

Investment intentions survey Number 50 March 2012

For office use only:

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If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

The closing date for this survey is **Wednesday 14 March 2012**. Please fax your responses to us by this date using our dedicated fax numbers of 020 7836 1210/5856 or send to the survey management group at the postal address cited below. Please answer on behalf of your UK manufacturing activities only.

Thankyou very much in advance for your response.

Jonathan Wood – head of CBI survey management group

1 Please indicate the percentage change in the value of investment* undertaken/authorised last year by your company, compared with the investment two years ago. Please tick one box only for each year

	Positive percentage change										No change		Negative percentage change											
	0.1 to 4	4.1 to 8	8.1 to 12	12.1 to 16	16.1 to 20	20.1 to 24	24.1 to 28	28.1 to 32	32.1 to 36	36.1 to 40	>40		-0.1 to -4	-4.1 to -8	-8.1 to -12	-12.1 to -16	-16.1 to -20	-20.1 to -24	-24.1 to -28	-28.1 to -32	-32.1 to -36	-36.1 to -40	>-40	
2010	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
2011	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Please indicate the expected percentage change in the value of investment* undertaken/authorised by your company for this year, compared with investment last year. Please tick one box only for each year

	Positive percentage change										No change		Negative percentage change											
	0.1 to 4	4.1 to 8	8.1 to 12	12.1 to 16	16.1 to 20	20.1 to 24	24.1 to 28	28.1 to 32	32.1 to 36	36.1 to 40	>40		-0.1 to -4	-4.1 to -8	-8.1 to -12	-12.1 to -16	-16.1 to -20	-20.1 to -24	-24.1 to -28	-28.1 to -32	-32.1 to -36	-36.1 to -40	>-40	
2011	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>
2012	<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Investment is defined as any authorised expenditure including plant and machinery, vehicles, buildings, leasing of fixed assets, innovation and information technology (which includes software, hardware, personnel and other IT-related expenses. This definition excludes marketing and training expenditure)

Please turn over to complete the basic data section ▶

Please complete and return to the
CBI survey management group by **Wednesday 14 March 2012**

Basic data section

Please enter here the SIC code number of the main manufacturing activity covered by this return

How many employees are covered by this return?

0-49
 50-99
 100-199
 200-249
 250-499
 500-999
 1000-4999
 5000+

What is the annual ex-works value of your direct exports?

nil-£75k
 £75k-£1m
 £1m-£3m
 £3m-£8m
 £8m-£15m
 £15m-£25m
 £25m-£40m
 £40m-£60m
 £60m-£100m
 £100m-£150m
 over £150m

Comments

SPECIMEN ONLY

Thankyou for supporting this survey

The CBI supplies the European Commission with harmonised manufacturing investment data derived from this survey. The CBI acknowledges the European Union's financial support for the technical development and supply of this data.

Your company details please complete as fully as possible

Your name

Your position

Company name

Address

Postcode

Telephone

Email

Past surveys and commissioning requests

Past survey activity

From November 1994 to November 2009 the CBI conducted a property trends survey which was sent to participants twice a year during May and November. This survey sought information about property requirements from all economic activity in the UK private sector. It contained six employment size groups, eight turnover bands, seven regions and four types of business categories. The survey's average response rate was between 150 and 200 respondents across all activity in the private sector, the sample having a significant number of companies with 5,000 or more employees.

The questionnaire consisted of two main subject areas: the macro-economic picture (questions on optimism relating to business situation, change in business output and change in overall employment), followed by property-related questions on floor space, change in overall property holdings, investment and limits to investment, change in sector holdings and regional changes.

External commissioning – Bank of England questions

As a result of a direct request from the Bank of England Monetary Analysis Division in 2007, the CBI has developed and embedded a special set of questions exclusively for the Bank's use across our suite of business surveys (except for the investment intentions survey). These questions cover output prices in the UK/overseas markets and wage/salary costs per person employed in industry, services, retail, wholesale, motor trades and financial services. The results of these questions along with anonymised micro-data are supplied to the Bank of England on an exclusive basis, allowing it to inform the perspectives and decision-making of the Bank's monetary policy committee and to increase the available research into inflation.

The questions were piloted across the first three months on supplementary questionnaires from July 2008 to January 2009 and were embedded into the main bodies of the questionnaires permanently from April 2010.

The Bank of England questions appear in the following surveys:

- Industrial trends, distributive trades and service sector survey – January, April, July and October
- CBI/PwC financial services survey – March, June, September and December.



The European dimension

Harmonised data supply to the European Commission

The survey management group has supplied its survey data in harmonised form to the Commission since the late 1970s. We are proud to be part of the 'European business and consumer tendency surveys' programme and particularly in the continuing development of the principle of harmonisation, working closely with the Commission's Economic and Financial Affairs Directorate. Harmonisation requires that national survey data is also processed and calculated in accordance with the required European industry groups and classifications. This process is applied to our manufacturing, retail, services and investment survey data so that we are able to supply national UK data and harmonised national data to the Commission's European Sentiment Indicator (ESI).

Harmonisation takes place across survey field work, trend periods, data output structures, industrial classifications and survey questions to ensure consistency with Commission requirements and in our survey methods. Small and acceptable differences in harmonisation parameters occur where the characteristics of the national surveys require them. The CBI works closely with the European Commission to ensure rigour and transparency in our processes and structures in accordance with international guidelines. The latest significant harmonisation exercise took place in 2010, when all relevant industrial classifications on our surveys

(the official codes that delineate one economic activity from another) were converted and updated in line with the major revisions to the European NACE classification system. The CBI regularly participates in the annual business and consumer survey workshops, held every autumn in Brussels. Every two years, the European Commission is joined by the Organisation for Economic Cooperation and Development (OECD) to discuss a wide-ranging agenda regarding survey methodology and economic indicators to continue the optimisation of business tendency survey work. The Commission's business survey programme is governed by a legal framework of annual grants and every four years a tendering process takes place through the Official Journal of the European Union (OJEU). The CBI acknowledges EU financial support for the technical development and supply of this data. Within this important survey programme, the academic study of business survey data in international forums is significant and wide-ranging, allowing researchers, economists and statisticians to gain extra insights into the meaning and significance of data and the answering behaviour of participants. The Centre for International Research on Economic Tendency Surveys (CIRET) has a lead role in the coordination and dissemination of this specialist research approach to survey data. Based at the KOF Swiss Economic Institute in Zurich, the centre organises conferences every two years to discuss the latest developments in this type of research.



Specialist survey research

Answering practices

For correct interpretation and analysis of our business surveys, it's essential that we have a clear understanding of the basis on which respondents reply. So every five years, we conduct research to explore and develop understanding of the considerations underlying companies' current response practices to our monthly and quarterly questionnaires. These surveys help us achieve a better understanding of the results and determine whether the current questionnaires need any modifications and improvements.

The answering practices survey provides valuable insight into:

- How companies assess business confidence and export optimism
- The underlying reasons for answering 'constraint'-style questions
- How participants assess an accurate measure of costs, capacity and profitability
- How participants answer 'up', 'same' or 'down' questions as the main parameters
- Participants' opinions about the surveys and their suggestions for improvement.

The answering practices survey therefore gives us a scientific look into the motivations of the participant when answering qualitative subjective opinion-based surveys. The response rates are very encouraging – between 50 and 90% of the normally expected regular survey response rate. The answering practices survey conducted in September 2012 for the service sector survey featured a special section of questions relating to capacity issues which were of great interest to the European Commission's harmonised programme. The survey also examined the special Bank of England price/wage questions.

The latest answering practices survey carried out for the industrial trends survey in April 2013 included a special section on capacity issues, developed with the Bank of England.

Academic research

CBI survey data can be accessed by researchers and academic or institutional bodies at any time, with users including the Bank of England and the National Institute for Economic and Social Research (NIESR). The CBI has carried out co-operative exercises with the National Institute for Economic and Social Research (NIESR) in 2005/06 to assist in the detailed studies of the value of disaggregated survey data from 1987-1997. We also collaborated with the Office for National Statistics (ONS) and the NIESR to help the investigation of the value of official and private sector survey data in determining and evolving flash indicators of GDP/inflation, where a significant amount of project work was undertaken.

For example, an in-depth consultation exercise with our sample of industrial trends survey participants, asked for consent in allowing their firm-level data to be used discreetly in a scientifically managed study undertaken by the NIESR using the facilities of the ONS micro-lab. As a result the CBI has been able to develop access to its own firm-level survey data for significant research purposes.

In 2003, Martin Weale (then director of NIESR) reported the preliminary findings of the NIESR disaggregation research at the joint EU/OECD workshops in Brussels. This resulted in the clearance by the CBI of the finalised version of *Qualitative business surveys: signal or noise?* authored by Silvia Lui, James Mitchell and Martin Weale and published on August 2010 in the journal of the Royal Statistical Society. The CBI's survey management group and economic analysis group played a major active role in promoting public awareness of this research work by hosting a seminar of the same name in March 2008 co-chaired by Martin Weale of NIESR and the CBI's Jonathan Wood. The seminar was organised as part of the social science week of the Economic and Social Research Council (ESRC). We look forward to further opportunities to collaborate with the research community in the future.

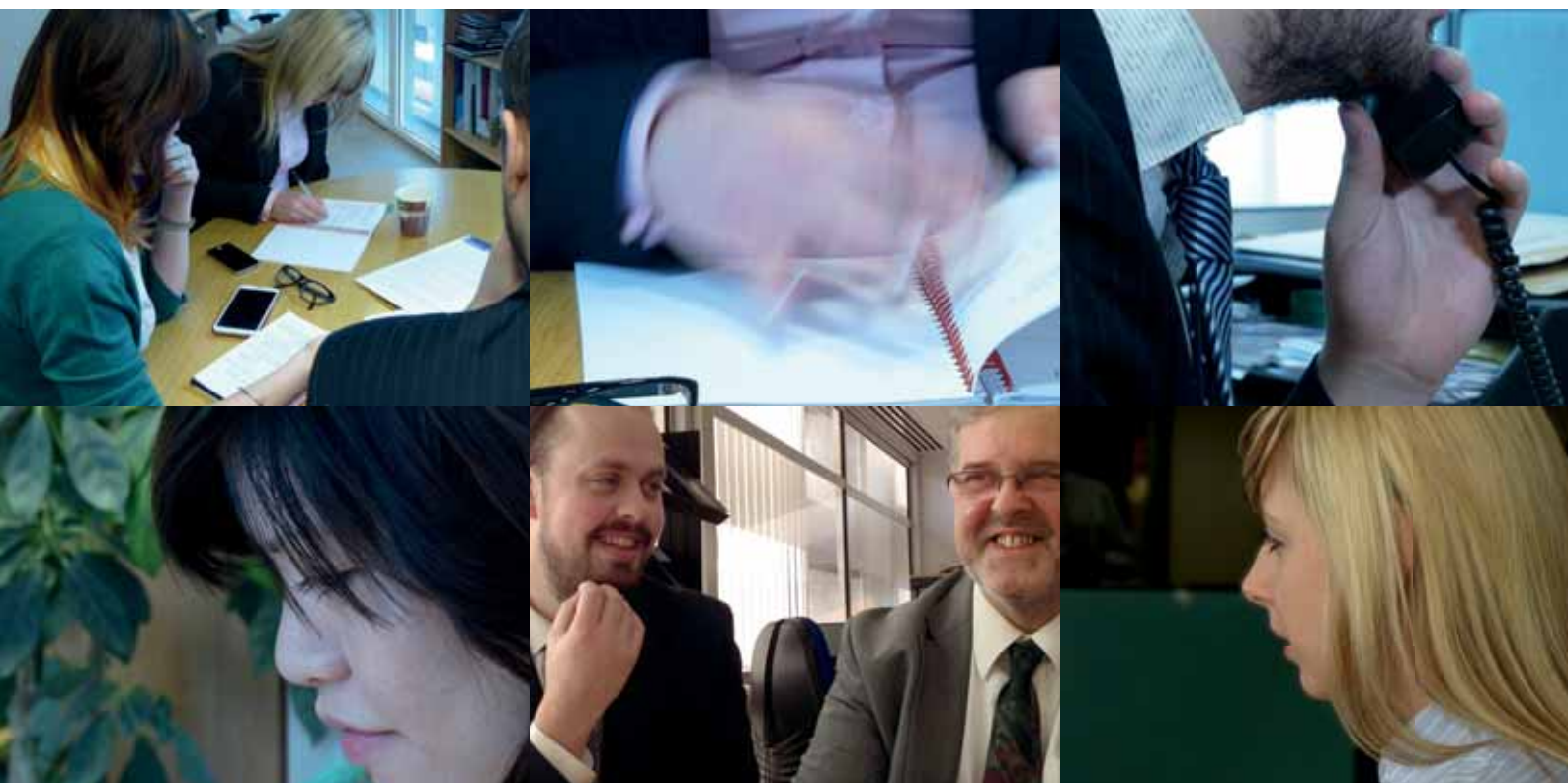
Anniversaries

The significant longevity of the CBI business surveys says much about their value and relevance in an increasingly busy survey environment. For instance, 2008 gave us an opportunity to reflect on and celebrate our quarterly industrial trends survey of UK manufacturing, conducted since 1958. Key external stakeholders at the Bank of England, the Treasury and those in academic business research gave us their own assessments of this ongoing work.

Likewise, 2010 saw the CBI/PwC financial services survey celebrate its 20th anniversary. This was a great opportunity for us to work with PwC to develop thought-leadership, reflecting on the swiftly changing face of this sector as well as a perspective on how it might develop in the future. Both anniversaries helped increase and promote understanding of the value of these surveys to a wide business audience. These anniversaries have also been very useful in allowing us to gauge the closeness of our survey data to officially sourced data, thus providing another opportunity for public scrutiny and statistical evaluation.

Thankyou

Such longevity would of course not be possible without the dedicated input of our highly valued survey respondents, who give so willingly of their time in a highly pressurised business environment. Above all, the anniversaries are therefore a key opportunity for the CBI to say a huge and resounding thankyou to all of them.



Confidential

Answering practices enquiry 2012

Enriching our understanding of participant response

Office use only

service sector survey

An important part of the correct interpretation of survey data is an awareness of the basis on which respondents reply. This questionnaire is therefore designed to investigate the considerations underlying companies' current response practices to the CBI's monthly and quarterly service sector survey.

The answers to this enquiry will enable us to gain a better understanding of the results and determine whether any modifications need to be made to the current questionnaires.

Throughout this enquiry, please refer to the enclosed facsimiles of the service sector survey forms, which are provided for your assistance in answering this questionnaire.

Please fax your response back to the CBI survey management group on **020 7836 1210/5856** or use the enclosed business reply paid envelope for your convenience, or you can scan your completed survey and email it to us as a PDF.

If you have any queries concerning this questionnaire or the service sector survey in general, please contact survey officer **Chris Taylor** on **020 7395-8108**.

Thankyou in advance for your assistance.

Please return by **Friday 28 September 2012**.

Quarterly section (please refer to facsimile A)

1a Please specify how you answer question 1 – ie Are you more or less optimistic than you were three months ago about the general business situation in your sector? (please tick one box only)

- i** A comparison of optimism/pessimism at the time of answering, against three months earlier
- ii** An indication of whether at the time of answering you are optimistic, neutral or pessimistic
- iii** A combination of option **i** and option **ii**
- iv** Other (please specify).....

1b When considering question 1, how would your answer be mainly determined? (please tick one box only)

- i** By your own company's current prospects/performance
- ii** By a view on the general economy as it affects your sector

Please complete and return to the
CBI survey management group by **Friday 28 September 2012**

Survey management group CBI Centre Point 103 New Oxford Street London WC1A 1DU
T: +44 (0)20 7395 8108/8081 F: +44 (0)20 7836 1210/5856 Email: surveymanagementgroup@cbi.org.uk

Please turn over to complete the questionnaire ▶

1c What are the most important factors influencing how you would answer question 1 – ie optimism about the general business situation? (please tick and rank your answer in order of importance, where 1 = most important)

- i Volume of current business
- ii Level of new enquiries
- iii Profitability
- iv Interest rates
- v Political or economic conditions in the UK
- vi Political or economic conditions abroad
- vii Exchange rates
- viii Other (please specify).....

2a When answering question 2a what yardstick do you use to assess whether or not your present level of business is 'normal' in volume terms? (please tick and rank as appropriate in each column)

- i The past level of work or an historical average
- ii Budgeted plans or forecasts
- iii Potential work capacity of your staff
- iv Average growth rates of your business
- v Other (please tick and specify).....

If you ticked option i, does your assessment of the 'normal' level of business change over time?

Yes No

If you answered 'yes' please indicate over which time period this assessment has altered: (please tick one box only)

- i Past twelve months
- ii Past 1-5 years
- iii More than 5 years

2b When assessing 'normality', what variation around the level of business would you consider as falling within the reply 'normal'? (please tick one box only)

- | | |
|-------------------------------------|----------------------------------|
| i up to 1% <input type="checkbox"/> | iv 5-8% <input type="checkbox"/> |
| ii 1-2% <input type="checkbox"/> | v 9-12% <input type="checkbox"/> |
| iii 3-4% <input type="checkbox"/> | vi >12% <input type="checkbox"/> |

3a For question 3, when answering, how do you measure the trend in the value of business compared to three months earlier? (please tick and rank in order of importance, where 1 = most important)

- i The total turnover received compared with three months ago
- ii By a subjective assessment
- iii Other (please tick and specify).....

3b For question 3a, when answering, how do you measure the trend in the volume of business compared to three months earlier? (please tick and rank in order of importance, where 1 = most important)

- i By number of transactions undertaken
- ii Number of hours billed
- iii Value of income received
- iv By a subjective assessment
- v Other (please tick and specify).....

3c Would you say your view on the trend over the coming three months is? (please tick and rank in order of importance, where 1 = most important)

- i Highly influenced by current conditions
- ii Influenced by planned activity that you know of within your firm
– eg new product launch, forthcoming sales drive, closure of branch etc
- iii Independent of the past quarter
- iv Predicated on trends in the economy
- v Other (please tick and specify).....

3d When answering questions 3 to 6 inclusive which refer to the 'trend' over the past three months (or the expected trend over the next three months), do you answer in terms of the change being: (please tick one box only)

- i From beginning to end of the three-month period
- ii In the three months as a whole compared to the previous three months
- iii In the past three months as a whole compared with the same three months of the previous year
- iv Some combination of the above options
- v Other (please tick and specify).....

4 Questions 2 through 6 on the service sector survey ask respondents to exclude seasonal variations. Are you able to exclude seasonal variations when answering this question? (please tick one box only)

If yes, please indicate how this is done

- i Subjectively
- ii By an established quantitative procedure

If no, is this because:

- i Seasonal factors are not significant for your business
- ii Seasonal factors are impossible to measure
- iii Other (please tick and specify).....

5a For questions 3 through 6 on the service sector survey, what percentage variation around a no-change base would you say would act as trigger point to cause you to answer 'up' or 'down'? (please tick one box only)

- i up to 1%
- ii 1-2%
- iii 3-4%
- iv 5-8%
- v >8%

5b When answering 'up' or 'down' in questions 3, 4, 5 and 6 of the service sector survey, is it in terms of: (please tick one box only)

- i The variable concerned has or is expected to rise/fall
- ii The variable concerned has or is expected to rise/fall more quickly than it has been rising/falling

6 In the service sector survey, question 5a seeks information on past and expected trends in average selling prices. Do you revise list prices at which your services are charged at the same time every year? (please tick one box only)

Yes No

If yes, is it in:

- i January (ie beginning of calendar year)
- ii April (ie beginning of tax year)
- iii Other (please tick and specify).....

If no, do you: (please tick those which apply to you)

- i Adjust prices depending on what the market or customer will bear
- ii Use pricing behaviour to reflect changes in costs
- iii Try to hold prices but periodically adjust them and not have any set date in mind
- iv Use lower prices as reward (for bulk orders, prompt payment etc)

7 When answering question 5d regarding the trend and expected trend for the overall profitability of business, does this refer to: (please tick one box only)

- i Total profits (total revenues less total costs)
- ii Some measure of profit margins on sales
- iii Other (please tick and specify).....

8a Question 7 of the survey seeks information on capital expenditure authorisation in the next twelve months compared with the previous twelve months. What proportion of your total planned capital spending in a typical year is accounted for by: (the proportions should add up to 100% – please specify proportion)

- i Land and buildings %
- ii Vehicles, plant and machinery %
- iii Information technology* %
- iv Other (please tick and specify)..... %

* This includes software/hardware, personnel and any other expenses related to information technology

9a Question 10 of the survey asks Do you expect to expand your business more in the next twelve months than you did over the past twelve months? (This may be read as a verdict on the strength of expansion, yet the answer may be conditioned on the extent of available capacity). When answering question 10, which factors do you consider most relevant: (please rank in order of importance, with 1 = most important)

- i Expectation that you will sell more/less in the coming year than the past year
- ii Expectation that you will have more capacity 12 months from now
- iii Extent of currently unused capacity (which could depress answer)
- iv Expectation that growth rate of sales will accelerate in year ahead
- v Other (please tick and specify).....

**9b When answering question 10, do you also think of the following before answering yes or no:
(please tick those that apply)**

- i The extent of price discounting
- ii The severity of competition
- iii Rising costs of doing business in the UK
- iv Outlook for, or risks to, the economy
- v Increasing regulatory compliance
- vi Extent of unused capacity
- vii Other (please tick and specify).....

10 In question 11 we ask *What factors are likely to limit your ability to increase your level of business over the next twelve months?* **and supply several options such as ‘overseas competition’ and ‘level of demand/sales’.**
Do you think another option entitled ‘statutory legislation and regulation’ could usefully be added?

Yes No

11 Question 12 asks *How do you consider the competitiveness of your UK-based operation has changed vis-à-vis competitors based overseas/or your own overseas subsidiaries (where relevant) over the past and coming three months?* **When answering this question, how do you currently measure your competitiveness?**
(please tick one box only)

- i Increasing market share compared with that held by overseas competitors
- ii Winning business at the expense of overseas competitors
- iii Lower charges for work undertaken compared with overseas competitors
- iv Greater business profitability compared with overseas competitors
- v Subjective assessment
- vi Other (please tick and specify).....

Monthly section – January, April, July and October questionnaires (please refer to facsimile B)

12 Question 8 asks *What has been the percentage change over the past twelve months in the general level of selling prices in the UK markets that your firm competes in and what is expected to occur over the next twelve months?*

(please tick and rank in order of importance, where 1 = most important) Do you answer:

- i With reference to pricing of direct competitors, or local market conditions
- ii Considering the UK market as a whole
- iii With reference to a general measure of UK inflation(eg the retail price index)
- iv Based on experience of your own business's past pricing behaviour
- v Other (please tick and specify).....

13 When answering question 8 and question 9 – *What has been the percentage change over the past twelve months in your firm's own average selling price/commissions/fees/charges in UK markets and what is expected to occur over the next twelve months? – Do you find that the one percentage point range allowed for each box:*

- i Is about right
- ii Is hard to assess within 1%

If ii, what range of percentage change do you think you can approximate to?

%

14 With regards to question 8 and question 9, what do you consider when answering:
(please tick and rank in order of importance, where 1 = most important)

- i Trend over past the 12 months
- ii General expectation for RPI or general inflation
- iii The need to amend prices based on your costs' recent or foreseen development
- iv A broader economic assessment (what the market will bear, etc)
- v Actions of direct competitors or local market conditions
- vi Other (please tick and specify).....

15 With regard to question 8 and Question 9, when would you tick the 'no change' box?

- i When prices are not changing
- ii When the rate of increase in prices is not changing

16 Question 9 asks *What has been the percentage change over the past twelve months in your firm's own average selling price/commissions/fees/charges and what is expected to occur over the next twelve months?***Do you give an estimate of the price change based on:**

- i Your company's main service/activity
- ii Your company's various services/activities, with a combined average that factors in the most important

17 Question 10 asks *What has been the percentage change over the past twelve months in your firm's wage/salary cost per person employed (including overtime and bonuses) and what is expected to occur over the next twelve months?***Do you find that the one percentage point range allowed for each box:**

- i Is about right
- ii Is hard to assess within 1%

If ii, what range of percentage change do you think you can approximate to? %**18 With regards to question 10 what do you consider when answering (please tick and rank in order of importance, where 1 = most important)**

- i Trend over past the 12 months
- ii General expectation for RPI or general inflation
- iii The need to amend salaries based on your costs' recent or foreseen development
- iv A broader economic assessment (what the market will bear, etc)
- v Actions of direct competitors or local market conditions
- vi Other (please tick and specify).....

19 With regard to question 10, when would you tick the 'no change' box?

- i When prices are not changing
- ii When the rate of increase in prices is not changing

20a Question 11 asks *If demand expanded, could you increase your volume of activity (ie volume of business) with your present resources?* **Please indicate your main consideration when answering – is it: (please tick one box only)**

- i Solely with your company's own resources of space, equipment and staff
- ii Solely with outside/external, subcontracted resources of space, equipment and staff
- iii With own resources of space, equipment but with subcontracted staff
- iv With outside/external resources of space and equipment using own staff
- v With some other combination of own/bought-in/subcontracted resources and/or staff
- vi Other (please tick and specify).....

20b With regards to question 11, do you also factor in financial considerations when answering?

Yes No

20c Question 11 continues *If so, by how much?* **When you specify a possible percentage increase in your volume of activity, is this:**

- i the percentage increase relative to your current volume of activity?
For example, if your turnover is currently 800 [units], and you estimate that with your present resources you could reach a turnover of 1,000, you would specify 25% (ie $1,000-800/800 = 25\%$)
- or
- ii the difference between your present level of activity and the maximum level of activity that you could reach with your present resources ('full capacity')? For example, if your turnover is currently 800 [units], and you estimate that with your present resources you could reach a turnover of 1,000, you would specify 20% (ie you are working currently at 80% of your 'full capacity' and you could add another 20% to reach 'full capacity')

Corporate insight

21 Who usually fills in the service sector survey? (please tick as appropriate, and underline the specific job-title)

- i Chairman/MD/CEO/deputy chairman/vice-president
- ii Director of function (eg finance, marketing, commercial, portfolio, corporate actuary etc)
- iii Planning and strategy director
- iv General manager/company secretary/accountant
- v Other (please tick and specify).....

22a Do you consider that the CBI's larger quarterly service sector survey questionnaire is easy to complete?Yes No **If you answered 'no', do you experience significant difficulty because: (please tick as appropriate)**

- i The questions are not wholly relevant to your company
- ii The time horizon indicated is inappropriate to your company
- iii Other (please tick and specify).....

If you have specific suggestions for improving the phrasing of any of the questions, please specify below:**22b Participant non-response is a key issue for the CBI in determining the quality of the regular survey data.**

If you have ever decided not to respond to the survey occasionally or on a regular basis, is this decision related to: (please tick as appropriate)

- i The length of the questionnaire
- ii The lack of available company time to complete it
- iii That your company is receiving a significant number of regular external survey invitations
- iv Considered a low priority
- v Absence
- vi Other (please tick and specify).....

23 At what level are the survey results used in your company? (please tick as appropriate)

- i Chairman/MD/CEO/deputy chairman/vice-president
- ii Director of function (eg finance, marketing, commercial, portfolio, corporate actuary etc)
- iii Planning and strategy director
- iv General manager/company secretary/accountant
- v Other (please tick and specify).....

24a How do you regard the results of the survey? (please use the scale provided and insert number 1-4 in the boxes below: 1 = invaluable, 2 = useful, 3 = limited use, 4 = of no use)

- i Overall written analysis and results
- ii Results for your sector
- iii The general presentation of the results

If you inserted 1-3 in the boxes, how do you use the survey results? Is it: (please tick one box only)

- i Regularly in your planning (eg for monitoring purposes)
- ii On a periodic basis (eg when preparing operation plans/budgets)
- iii Other (please tick and specify).....

24b If you have any suggestions for improving the survey results brief, please indicate below.

24c Please specify below if you have any suggestions for improving the usefulness of the survey from your point of view.

25 Do you consider that any new questions or topics should be added to extend the coverage of the survey?

Yes No

If yes, please specify up to three new questions or topics which you think would add value:

- i
- ii
- iii

26 Would you like to be offered the choice of being able to complete the survey online/by email as well as by post?

Yes No

If yes, would you be willing to participate in a web enablement trial?

Yes No

Basic data section

Many thanks from the CBI survey management group for your ongoing support, which is highly valued. In due course we will be preparing a research paper based on the anonymised results of this survey, and will be very happy to send you a copy when complete.

Please indicate the number of employees covered by this return:

1-49 50-199 200-499 500-4,999 5,000+

Please indicate the annual turnover covered by this return:

up to £500k £501k-£1m £1.1m-£2m £2.1m-£5m £5.1m-£10m
 £10.1m-£20m £20.1-£100m £101.1m-£500m £500m +

Please indicate the main business activity code covered by this return:

- Travel services
- Leisure, personal care and private healthcare
- Telecommunications/computing
- Management, legal services and chartered accountants
- Property services, architects and design consultants
- Office and personnel services
- Hotels, bars and restaurants
- Transport of goods and post
- Marketing and advertising

Your company details **please complete as fully as possible, printing your details clearly**

Your name

Your position

Company name

Address

Postcode

Email

Please tick if you are happy for us to use this email address in a web-enablement trial



Product code: ECO_SUR_303

The future

Capturing data electronically

A major project for us now is web-enablement, which will mean survey participants being able to respond online in addition to existing response methods. It will be quick, easy, cost-free and more environmentally friendly. It should also boost the surveys response figures and their online presence.

Fax currently remains the most popular method of general response, followed closely by post (we also offer email and phone). We expect web/electronic response rates to quickly increase due to its simplicity and cost-free nature for participants. Another bonus is that we will receive survey data instantly, avoiding the delays sometimes caused by traditional methods.

The conclusion from the focus group we set up to look into this new response method was that the top priority was the security and confidentiality of the company's identity and its data. So a web-enabled electronic capture response system will have to continue the survey management group's imperative of maintaining the confidence of participants. The SMG will also conduct thorough testing of this method before it goes live to check compatibility with our existing survey system.

As well as getting higher response rates, the new web-enabled method will also allow us to increase the profile and visibility of the range of surveys.

Improving our visibility is an ongoing process involving new techniques and approaches, as well as quarterly meetings with internal web developers to discuss website metrics to ensure the CBI retains peak form against its competitors.

Alongside confidentiality and security, our other top priority will be the exact electronic replication of our well-recognised questionnaire onscreen, giving participants the optimum answering experience.

Reaping the benefits

There are many benefits to participating in CBI business surveys. Participants' survey data provides information and strategic intelligence on macro-economic issues, demonstrated by the analytical expertise of the CBI's economic analysis teams.

Our full economic commentary on how the economy is moving and economic forecasts, helps businesses make better decisions and broaden their economic intelligence of the UK economy.

We value your input

To find out more about how to gain these benefits and for the opportunity to participate in our market-leading business surveys on business conditions and trends, please contact senior survey coordinator Nicola Grimwood or survey operations and research executive Rebecca Wong.

We would be very pleased to hear from you in our regular business survey activity.

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By post

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Classification codes

CBI classification listing for the industrial trends survey

These codes are taken from the new Standard Industrial Classification (SIC 2007) published by the Office of National Statistics.

07	Mining of metal ores	24.1	Manufacture of basic iron and steel and of ferro-alloys
08	Other mining and quarrying	24.2	Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
10.1	Processing and preserving of meat and production of meat products	24.3	Manufacture of other products of first processing of steel
10.2	Processing and preserving of fish, crustaceans and molluscs	24.4	Manufacture of basic precious and other non-ferrous metals
10.3	Processing and preserving of fruit and vegetables	24.5	Casting of metals
10.4	Manufacture of vegetable and animal oils and fats	25.1	Manufacture of structural metal products
10.5	Manufacture of dairy products	25.2	Manufacture of tanks, reservoirs and containers of metal
10.6	Manufacture of grain mill products, starches and starch products	25.3	Manufacture of steam generators, except central heating hot water boilers
10.7	Manufacture of bakery and farinaceous products	25.4	Manufacture of weapons and ammunition
10.8	Manufacture of other food products	25.5	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
10.9	Manufacture of prepared animal feeds	25.6	Treatment and coating of metals; machining
11	Manufacture of beverages	25.7	Manufacture of cutlery, tools and general hardware
12	Manufacture of tobacco products	25.9	Manufacture of other fabricated metal products
13.1	Preparation and spinning of textile fibres	26.1	Manufacture of electronic components and boards
13.2	Weaving of textiles	26.2	Manufacture of computers and peripheral equipment
13.3	Finishing of textiles	26.3	Manufacture of communication equipment
13.9	Manufacture of other textiles	26.4	Manufacture of consumer electronics
14	Manufacture of wearing apparel	26.5	Manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks
14.1	Manufacture of wearing apparel, except fur apparel	26.6	Manufacture of irradiation, electromedical and electrotherapeutic equipment
14.2	Manufacture of articles of fur	26.7	Manufacture of optical instruments and photographic equipment
14.3	Manufacture of knitted and crocheted apparel	26.8	Manufacture of magnetic and optical media
15	Manufacture of leather and related products	27.1	Manufacture of electric motors, generators, transformers and electricity distribution and control apparatus
15.1	Tanning and dressing of leather; manufacture of leather goods; fur	27.2	Manufacture of batteries and accumulators
15.2	Manufacture of footwear	27.3	Manufacture of wiring and wiring devices
16	Manufacture of wood and of products of wood/cork, except furniture; manufacture articles of straw/plaiting materials	27.4	Manufacture of electric lighting equipment
16.1	Sawmilling and planing of wood	27.5	Manufacture of domestic appliances
16.2	Manufacture of products of wood, cork, straw and plaiting materials	27.9	Manufacture of other electrical equipment
17	Manufacture of paper and paper products	28	Manufacture of machinery and equipment not elsewhere classified
17.1	Manufacture of pulp, paper and paperboard	28.1	Manufacture of general-purpose machinery: engines and turbines (except aircraft, vehicle and cycle engines); fluid power equipment; pumps and compressors; taps and valves; bearings, gears, gearing and drive elements
17.2	Manufacture of articles of paper and paperboard	28.2	Manufacture of other general-purpose machinery
18	Printing and reproduction of recorded media	28.3	Manufacture of agricultural and forestry machinery
18.1	Printing and service activities related to printing	28.4	Manufacture of metal forming machinery and machine tools
18.2	Reproduction of recorded media	28.9	Manufacture of other special-purpose machinery
19	Manufacture of coke and refined petroleum products	29	Manufacture of motor vehicles, trailers and semi-trailers
19.1	Manufacture of coke oven products	29.1	Manufacture of motor vehicles
19.2	Manufacture of refined petroleum products	29.2	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
20.1	Manufacture of basic chemicals, fertilisers and nitrogen compounds, plastics and synthetic rubber in primary forms	29.3	Manufacture of parts and accessories for motor vehicles
20.2	Manufacture of pesticides and other agrochemical products	30.1	Building of ships and boats
20.3	Manufacture of paints, varnishes and similar coatings, printing ink and mastics	30.2	Manufacture of railway locomotives and rolling stock
20.4	Manufacture of soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations	30.3	Manufacture of air and spacecraft and related machinery
20.5	Manufacture of other chemical products	30.4	Manufacture of military fighting vehicles
20.6	Manufacture of man-made fibres	30.9	Manufacture of transport equipment not elsewhere classified
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations	31	Manufacture of furniture
21.1	Manufacture of basic pharmaceutical products	32.1	Manufacture of jewellery, bijouterie and related articles
21.2	Manufacture of pharmaceutical preparations	32.2	Manufacture of musical instruments
22.1	Manufacture of rubber products	32.3	Manufacture of sports goods
22.2	Manufacture of plastics products	32.4	Manufacture of games and toys
23.1	Manufacture of glass and glass products	32.5	Manufacture of medical and dental instruments and supplies
23.2	Manufacture of refractory products	32.9	Manufacturing not elsewhere classified
23.3	Manufacture of clay building materials	33	Repair and installation of machinery and equipment
23.4	Manufacture of other porcelain and ceramic products	33.1	Repair of fabricated metal products, machinery and equipment
23.5	Manufacture of cement, lime and plaster	33.2	Installation of industrial machinery and equipment
23.6	Manufacture of articles of concrete, cement and plaster		
23.7	Cutting, shaping and finishing of stone		
23.9	Manufacture of abrasive products and non-metallic mineral products not elsewhere classified		
24	Manufacture of basic metals		

CBI classification listing for the distributive trades survey

These codes are taken from the new Standard Industrial Classification (SIC 2007) published by the Office of National Statistics.

Motor trades

- 45.1 Sale of motor vehicles
- 45.2 Maintenance and repair of motor vehicles
- 45.3 Sale of motor vehicle parts and accessories
- 45.4 Sale, maintenance and repair of motorcycles and related parts and accessories

Wholesale trade, except of motor vehicles and motorcycles

- 46.1 Wholesale on a fee or contract basis
- 46.2 Wholesale of agricultural raw materials and live animals
- 46.3 Wholesale of food, beverages and tobacco

Wholesale of household goods

- 46.41 Wholesale of textiles
- 46.42 Wholesale of clothing and footwear
- 46.43 Wholesale of electrical household appliances
- 46.44 Wholesale of china and glassware and cleaning materials
- 46.45 Wholesale of perfume and cosmetics
- 46.46 Wholesale of pharmaceutical goods
- 46.47 Wholesale of furniture, carpets and lighting equipment
- 46.48 Wholesale of watches and jewellery
- 46.49 Wholesale of other household goods

Wholesale of information and communication equipment

- 46.5 Wholesale of information and communication equipment

Wholesale of other machinery, equipment and supplies

- 46.61 Wholesale of agricultural machinery, equipment and supplies
- 46.62 Wholesale of machine tools
- 46.63 Wholesale of mining, construction and civil engineering machinery
- 46.64 Wholesale of machinery for the textile industry and of sewing and knitting machines
- 46.65 Wholesale of office furniture
- 46.66 Wholesale of other office machinery and equipment
- 46.69 Wholesale of other machinery and equipment

Other specialised wholesale

- 46.71 Wholesale of solid, liquid and gaseous fuels and related products
- 46.72 Wholesale of metals and metal ores
- 46.73 Wholesale of wood, construction materials and sanitary equipment
- 46.74 Wholesale of hardware, plumbing and heating equipment and supplies
- 46.75 Wholesale of chemical products
- 46.76 Wholesale of other intermediate products
- 46.77 Wholesale of waste and scrap
- 46.9 Non-specialised wholesale trade

Retail sale in non-specialised stores

- 47.11 Retail sale in non-specialised stores with food, beverages or tobacco predominating
- 47.19 Other retail sale in non-specialised stores
- 47.2 Retail sale of food, beverages and tobacco in specialised stores
- 47.3 Retail sale of automotive fuel in specialised stores
- 47.4 Retail sale of information and communication equipment in specialised stores
- 47.5 Retail sale of other household equipment in specialised stores
- 47.51 Retail sale of textiles in specialised stores
- 47.52 Retail sale of hardware, paints and glass in specialised stores
- 47.53 Retail sale of carpets, rugs, wall and floor coverings in specialised stores
- 47.54 Retail sale of electrical household appliances in specialised stores
- 47.59/1 Retail sale of musical instruments and scores in specialised stores
- 47.59/9 Retail sale of furniture, lighting equipment and other household articles (other than musical instruments) not elsewhere classified, in specialised stores

Retail sale of cultural and recreation goods in specialised stores

- 47.61 Retail sale of books in specialised stores
- 47.62 Retail sale of newspapers and stationery in specialised stores
- 47.63 Retail sale of music and video recordings in specialised stores
- 47.64 Retail sale of sporting equipment in specialised stores
- 47.65 Retail sale of games and toys in specialised stores

Retail sale of other goods in specialised stores

- 47.71 Retail sale of clothing in specialised stores
- 47.72 Retail sale of footwear and leather goods in specialised stores
- 47.73 Dispensing chemist in specialised stores
- 47.74 Retail sale of medical and orthopaedic goods in specialised stores
- 47.75 Retail sale of cosmetic and toilet articles in specialised stores
- 47.76 Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores
- 47.77 Retail sale of watches and jewellery in specialised stores
- 47.78 Other retail sale of new goods in specialised stores
- 47.79 Retail sale of second-hand goods in stores
- 47.8 Retail sale via stalls and markets
- 47.9 Retail trade not in stores, stalls or markets
- 47.91 Retail sale via mail order houses or via Internet
- 47.99 Other retail sale not in stores, stalls or markets

CBI classification listing for the service sector survey

These codes are taken from the new Standard Industrial Classification (SIC 2007) published by the Office of National Statistics.

Land transport and transport via pipelines

- 49.1 Passenger rail transport, interurban
- 49.2 Freight rail transport
- 49.3 Other passenger land transport – eg bus, coach, taxi plus urban and suburban rail
- 49.4 Freight transport by road and removal services
- 49.5 Transport via pipeline

Water transport

- 50.1 Sea and coastal passenger water transport
- 50.2 Sea and coastal freight water transport
- 50.3 Inland passenger water transport
- 50.4 Inland freight water transport

Air transport

- 51.1 Passenger air transport
- 51.2 Freight air transport and space transport

Warehousing and support activities for transportation

- 52.1 Warehousing and storage
- 52.2 Support activities for transportation

Postal and courier activities

- 53.1 Postal activities under universal service obligation
- 53.2 Other postal and courier activities

Accommodation

- 55.1 Hotels and similar accommodation
- 55.2 Holiday and other short-stay accommodation
- 55.3 Camping grounds, recreational vehicle parks and trailer parks
- 55.9 Other accommodation

Food and beverage service activities

- 56.1 Restaurants and mobile food service activities
- 56.2 Event catering and other food service activities
- 56.3 Beverage serving activities

Publishing activities

- 58.1 Publishing of books, periodicals and other publishing activities
- 58.2 Software publishing

Motion picture, video and television programme production, sound recording and music publishing activities

- 59.1 Motion picture, video and television programme activities
- 59.2 Sound recording and music publishing activities

Programming and broadcasting activities

- 60.1 Radio broadcasting
- 60.2 Television programming and broadcasting activities

Telecommunications

- 61.1 Wired telecommunications activities
- 61.2 Wireless telecommunications activities
- 61.3 Satellite telecommunications activities
- 61.9 Other telecommunications activities

Computer programming, consultancy and related activities

- 62.01 Computer programming activities
- 62.02 Computer consultancy activities
- 62.03 Computer facilities management activities
- 62.09 Other information technology and computer service activities

Information service activities

- 63.1 Data processing, hosting and related activities, web portals
- 63.11 Data processing, hosting and related activities
- 63.12 Web portals
- 63.9 Other information service activities

Real estate activities

- 68.1 Buying and selling of own real estate
- 68.2 Renting and operating of own or leased real estate
- 68.3 Real estate activities on a fee or contract basis

Legal and accounting activities

- 69.1 Legal activities
- 69.2 Accounting, bookkeeping and auditing activities, tax consultancy

Activities of head offices, management consultancy activities

- 70.1 Activities of head offices
- 70.2 Management consultancy activities

Architectural and engineering activities; technical testing and analysis

- 71.1 Architectural and engineering activities and related technical consultancy
- 71.2 Technical testing and analysis

Scientific research and development

- 72.1 Research and experimental development on natural sciences and engineering
- 72.2 Research and experimental development on social sciences and humanities

Advertising and market research

- 73.1 Advertising
- 73.2 Market research and public opinion polling

Other professional, scientific and technical activities

- 74.1 Specialised design activities
- 74.2 Photographic activities
- 74.3 Translation and interpretation activities
- 74.9 Other professional, scientific and technical activities not elsewhere classified

Veterinary activities

- 75.0 Veterinary activities

Renting and leasing activities

- 77.1 Renting and leasing of motor vehicles
- 77.2 Renting and leasing of personal and household goods
- 77.3 Renting and leasing of other machinery, equipment and tangible goods
- 77.4 Leasing of intellectual property and similar products, except copyrighted works

Employment activities

- 78.1 Activities of employment placement agencies
- 78.2 Temporary employment agency activities
- 78.3 Other human resources provision

Travel agency, tour operator reservation service and related activities

- 79.1 Travel agency and tour operator activities
- 79.11 Travel agency activities
- 79.12 Tour operator activities
- 79.9 Other reservation service and related activities

Security and investigation activities

- 80.1 Private security activities
- 80.2 Security systems service activities
- 80.3 Investigation activities

Services to buildings and landscape activities

- 81.1 Combined facilities support activities
- 81.2 Cleaning activities
- 81.3 Landscape service activities

Office administrative, office support and other business support activities

- 82.1 Office administrative and support activities
- 82.2 Activities of callcentres
- 82.3 Organisation of conventions and trade shows
- 82.9 Business support service activities not elsewhere classified

Residential care activities

- 87 Residential care activities

Creative, arts and entertainment activities

- 90.0 Creative, arts and entertainment activities

Libraries, archives, museums and other cultural activities

- 91.01 Library and archives activities
- 91.02 Museums activities
- 91.03 Operation of historical sites and buildings and similar visitor attractions
- 91.04 Botanical and zoological gardens and nature reserves activities

Gambling and betting activities

- 92.0 Gambling and betting activities

Sports activities and amusement and recreation activities

- 93.1 Sports activities
- 93.11 Operation of sports facilities
- 93.12 Activities of sport clubs
- 93.13 Fitness facilities
- 93.19 Other sports activities
- 93.2 Amusement and recreation activities
- 93.21 Activities of amusement parks and theme parks
- 93.29 Other amusement and recreation activities

Activities of membership organisations

- 94.1 Activities of business, employers and professional membership organisations
- 94.2 Activities of trade unions
- 94.9 Activities of other membership organisations

Repair of computers and personal and household goods

- 95.1 Repair of computers and communication equipment
- 95.2 Repair of personal and household goods

Other personal service activities

- 96.01 Washing and (dry-) cleaning of textile and fur products
- 96.02 Hairdressing and other beauty treatment
- 96.03 Funeral and related activities
- 96.04 Physical well-being activities
- 96.09 Other personal service activities not elsewhere classified

CBI classification listing for the financial services survey

These codes are taken from the new Standard Industrial Classification (SIC 2007) published by the Office of National Statistics.

Financial service activities, except insurance and pension funding**Monetary intermediation**

- 64.1 Monetary intermediation
- 64.19/1 Banks
- 64.19/2 Building Societies

Activities of holding companies

- 64.2 Private equity/Activities of holding companies

Trusts, funds and similar financial entities

- 64.3 Investment management/Trusts, funds and similar financial entities

Other financial service activities, except insurance and pension funding

- 64.9 Other financial service activities, except insurance and pension funding
- 64.91 Other financial institutions/Financial leasing
- 64.92 Finance houses/Other credit granting
- 64.99 Other financial institutions/Other financial service activities, except insurance and pension funding n.e.c.

Insurance, reinsurance and pension funding, except compulsory social security**Insurance**

- 65.1 Insurance
- 65.11 Life insurance
- 65.12 General insurance/Non-life insurance

Reinsurance

- 65.20/1 Life insurance/Reinsurance
- 65.20/2 General insurance/Reinsurance

Pension funding

- 65.3 Investment management/Pension funding

Activities auxiliary to financial services and insurance activities**Activities auxiliary to financial services, except insurance and pension funding**

- 66.1 Activities auxiliary to financial services, except insurance and pension funding
- 66.11 Administration of financial markets
- 66.12 Security and commodity contracts brokerage
- 66.19 Other activities auxiliary to financial services, except insurance and pension funding

Activities auxiliary to insurance and pension funding

- 66.2 Activities auxiliary to insurance and pension funding
- 66.21 Risk and damage evaluation
- 66.22 Insurance brokers/Activities of insurance agents and brokers
- 66.29 Other activities auxiliary to insurance and pension funding

Fund management activities

- 66.3 Investment management/Fund management activities

Glossary

Aggregations/aggregate response

Responses that are collected together by their structural characteristics to form a total representation of a sector, size band etc.

Anonymised/confidentiality

To secure and protect individual company identity and their individual data.

Balance methodology

Process whereby a single statistical figure is derived from the difference between the weighted percentage of the companies answering in positive and minus the percentage replying with negative.

Dormant company

A company with significant accounting transactions' during the accounting period.

European harmonisation

An officially defined process of conformity across of all aspects of business survey methodology, to ensure process and data quality and best practice.

European industrial activity classification (NACE Rev.2)

European Classification of Economic Activities

Firm-level data/micro-data

Individual respondent level data – usually a line of respondent data – question by question – providing the survey researcher with granular insight into a company or individual's response.

Gazette code

A code attached to a company, if it is failing or has already failed, with the usual codes being in liquidation, administration, closed or dissolved.

Independent

A stand-alone entity meaning it is not owned by a company, nor does it own another company.

Item non-response unit

If participants do not complete a question thoroughly enough or have incorrectly filled in the question, the survey management group will either contact the company or impute the answer accordingly so there are no inconsistencies within the data.

Macro-economy

Analysis of a country's economy as a whole.

Parent company

A parent company is a company that owns enough voting stock in another firm to influence its management and operations. This can be done either through a majority shareholding or if the subsidiary was set up specifically to handle one aspect of the larger organisations operations.

Private company

A private company does not sell its shares to the wider public and its shares can only be traded with the permission of the Board of Directors. A private company will have Ltd after its name.

Public company

A public company or publicly traded company is owned by a group of shareholders that offers its securities such as stock/shares and bonds/loans for sale to the general public, typically through a stock exchange. A public company will have PLC after its name.

Qualitative

With the emphasis being put on the descriptive value and meaning of data rather than the measurable, numerical side of data, providing a more in-depth analysis of the macro-economy data.

Raw weighted data

Survey responses aggregated using a 'weighting' method – ie assigning a numerical factor to those respondents which provide a larger contribution to economic output.

SIC (Standard Industrial Classifications)

A numerical classification developed by national and international official statistical bodies to represent all economic activity at broad and granular level.

Subsidiary

A subsidiary is a company where the majority or all the shares are owned by a parent/holding company or is set up specifically to handle one aspect of the larger organisations operations.

Survey weights

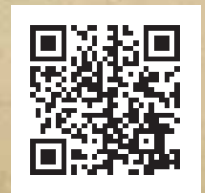
Derived from official sources, weights data are applied to survey responses prior to calculation to reflect the economic contribution of each company to the overall sector population; therefore the larger the company, the larger the weight.

Weighting matrices

A technical grid populated by officially sourced data which is then applied to sectors and other measures.

For further information on this report,
or for a copy in large text format contact:

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CBI

Our mission is to promote the conditions in which
businesses of all sizes and sectors in the UK can
compete and prosper for the benefit of all.

To achieve this, we campaign in the UK, the EU and
internationally for a competitive business landscape.

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