

SERVICES SURVEY QUESTIONNAIRE

IF FRESH, ASK:

Can I speak to[FROM FILE]. [RESPONDENT MUST BE MD/OWNER/CEO. FINANCE DIRECTOR/CFO WOULD ALSO BE ABLE TO ANSWER THE QUESTIONS]

Hi, I'm calling from Ipsos MRBI conducting the European **Services** Confidence Study, supported by the European Commission and Bank of Ireland and which asks firms in the Services Sector about the business situation as they see it. It will just take two / a couple of minutes to complete. In keeping with Irish and International research codes of conduct, all your responses will be treated in the strictest confidence.

IF FRESH, ASK:

SQ Can I just confirm you are the CEO/ Managing Director/ Proprietor or someone with overall responsibility for the business?

- Yes **CONTINUE**
No **ALTERNATIVE CONTACT**

IF PANELLIST, ASK:

Can I speak to ... [FROM FILE].

Hi, I'm calling from Ipsos MRBI to conduct the next wave of the European **Services** Confidence Study. [REMINDEE RESPONDENT THAT THEY HAVE PREVIOUSLY CONDUCTED THE SURVEY IF NECESSARY].

ASK ALL:

MONTHLY QUESTIONS

When answering the following questions please exclude any seasonal variations in your sector.

- Q.1** How has your business situation developed over the past 3 months? It has...
- + Improved
 - = Remained unchanged
 - Deteriorated
- Refused/ not applicable (DNRO)
- Q.2** How has demand (turnover) for your company's services changed over the past 3 months? It has ...
- + Increased
 - = Remained unchanged
 - Decreased
- Refused/ not applicable (DNRO)
- Q.3** How do you expect the demand (turnover) for your company's services to change over the next 3 months? It will...
- + Increase
 - = Remain unchanged
 - Decrease
- Refused/ not applicable (DNRO)
- Q.3.1** The future development of your business situation is currently...
- ++ Easy to predict
 - + Moderately easy to predict
 - Moderately difficult to predict
 - Difficult to predict
- Refused/ not applicable (DNRO)

- Q.4** How has your firm's total employment changed over the past 3 months? It has...
- + Increased
 - = Remained unchanged
 - Decreased
 - Refused/ not applicable (DNRO)
- Q.5** How do you expect your firm's total employment to change over the next 3 months? It will...
- + Increase
 - = Remain unchanged
 - Decrease
 - Refused/ not applicable (DNRO)
- Q.6** How do you expect the prices you charge to change over the next 3 months? They will...
- + Increase
 - = Remain unchanged
 - Decrease
 - Refused/ not applicable (DNRO)
- Q.7** How have your input costs, excluding labour costs (i.e. average price of purchases), developed over the past 3 months? They have...
- + Increased
 - = Remained unchanged
 - Decreased
 - Refused/ not applicable (DNRO)
- Q.8** Do you consider your current overall order books to be...?
- + More than sufficient (above normal)
 - = Sufficient (normal for the season)
 - Not sufficient (below normal)
 - Refused/ not applicable (DNRO)
- Q.9** Do you consider your current export order books to be...?
- + More than sufficient (above normal)
 - = Sufficient (normal for the season)
 - Not sufficient (below normal)
 - Refused/ not applicable (DNRO)

QUARTERLY QUESTIONS - JANUARY, APRIL, JULY, OCTOBER

- Q.1** What main factors are currently limiting your business? **READ OUT. MULTICODE**
- Insufficient demand
 - Shortage of labour force
 - Shortage of space and/or equipment
 - Financial constraints
 - Uncertainty about economic policy in general (e.g. tax, government spending, regulation, central bank policy)
 - Uncertainty about economic policies impacting your sector
 - Rental costs
 - None
 - Other factors (please specify) **[Interviewer: probe other factors but do not read out specific other factors]**
- Q.2** If demand expanded, could you increase your volume of activity with your present resources?
- Yes
 - No



IF YES AT Q.2, ASK

Q.2.1 By about how many percent could you expand activity with present resources ___% (MAX 100)

ASK ALL

Q.3 How do you expect your export orders to develop over the next 3 months? They will...

- + Increase
- = Remain unchanged
- Decrease
- Refused/ not applicable (DNRO)

We are now going to ask a number of questions about your firm's "competitive position", either in Ireland or abroad if you export. Competitive position refers primarily to your ability to compete on price when selling in your markets and could be influenced by changes in costs or exchange rates. Please note that the UK is now **outside** the EU.

Q.4 How has your competitive position on the Irish market developed over the past 3 months? It has...

- + Improved
- = Remained unchanged
- Deteriorated
- Refused/ not applicable (DNRO)

Q.5 How has your competitive position on foreign markets inside the EU developed over the past 3 months? It has...

- + Improved
- = Remained unchanged
- Deteriorated
- Refused/ not applicable (DNRO)

Q.6 How has your competitive position on foreign markets outside the EU developed over the past 3 months? It has...

- + Improved
- = Remained unchanged
- Deteriorated
- Refused/ not applicable (DNRO)

Q.7 Thinking about the next one to three years, which of the following best describes your business ambitions?

- ++ Feeling confident and will actively pursue opportunities to grow the business
- + Plan to grow but remain cautious
- = Prefer to stay the same size
- Intend to scale down
- Refused/ not applicable (DNRO)

BIANNUAL QUESTIONS

ASK IN JANUARY AND JULY

Q.1 By what percentage do you expect to change basic pay for your employees over the next 12 months relative to the last 12 months? Would that be....

- Increase by more than 4%
- Increase by between 2 and 4%
- Increase by less than 2%
- More or less remain the same
- Fall by less than 2%
- Fall by between 2 and 4%
- Fall by more than 4%
- Don't know (DNRO)



ASK IN FEBRUARY AND SEPTEMBER

We are now going to ask a question about the broader operating environment in your region.

INTERVIEWER NOTE (DNRO): BY THIS WE MEAN INFRASTRUCTURE, WE ARE NOT REFERRING TO REGULATIONS OR TAX

Q.1 In order to strengthen the local economy and business environment in your region, which type of infrastructure do you think should be the priority for investment? **[Indicate one option] INTERVIEWER READ OUT**

- Transport (e.g. road, rail, airports, seaports)
- Telecommunications (e.g. fixed line, mobile, broadband)
- Basic infrastructure (e.g. water, waste, energy)
- Housing
- Refused/ not applicable (DNRO)

ANNUAL QUESTIONS

ASK IN MARCH

We are now going to ask some questions about your investment activity and plans. This information is particularly useful for the European Commission for monitoring developments in the EU. These investment questions are only asked twice per year.

Q.1 Did your total investment last year increase or decrease relative to two years ago? (i.e. 2021 vs 2020) It...

- Increased
- Remained unchanged
- Decreased
- Refused/Not applicable (DNRO)

Q.2 Did your investment in machinery and equipment last year increase or decrease relative to two years ago? (i.e. 2021 vs 2020)

- Increased
- Remained unchanged
- Decreased
- Refused/Not applicable (DNRO)

Q.3 Did your investment in land, building and infrastructure last year increase or decrease relative to two years ago? (i.e. 2021 vs 2020)

- Increased
- Remained unchanged
- Decreased
- Refused/Not applicable (DNRO)

Q.4 Did your investment in intangibles last year increase or decrease relative to two years ago? (i.e. 2021 vs 2020) Intangibles include R&D, software, data, intellectual property, training etc.

- Increased
- Remained unchanged
- Decreased
- Refused/Not applicable (DNRO)

Q.5 Do you expect your total investment this year to increase or decrease relative to last year? (i.e. 2022 vs 2021) It will...

- Increase
- Remain unchanged
- Decrease
- Refused/Not applicable (DNRO)

- Q.6** Do you expect your investment in machinery and equipment this year to increase or decrease relative to last year? (i.e. 2022 vs 2021)
- Increase
 - Remain unchanged
 - Decrease
 - Refused/Not applicable (DNRO)
- Q.7** Do you expect your investment in land, building and infrastructure this year to increase or decrease relative to last year? (i.e. 2022 vs 2021)
- Increase
 - Remain unchanged
 - Decrease
 - Refused/Not applicable (DNRO)
- Q.8** Do you expect your investment in intangibles this year to increase or decrease relative to last year? (i.e. 2022 vs 2021) It will...
- Increase
 - Remain unchanged
 - Decrease
 - Refused/Not applicable (DNRO)
- Q.9** How would you intend to finance any future investment? **READ OUT. MULTICODE**
- Internal funds (retained earnings, proprietors' funds)
 - Bank loan
 - External investor
 - Market based financing (e.g. issuance of shares/bonds)
 - Leasing
 - Other
 - No future investment plans

ANNUAL QUESTIONS

ASK IN NOVEMBER

We are now going to ask some questions about your investment activity and plans. This information is particularly useful for the European Commission for monitoring developments across the EU. These investment questions are only asked twice per year.

- Q.1** Did your total investment this year increase or decrease relative to last year? (i.e. 2021 vs 2020)
- Increased
 - Remained unchanged
 - Decreased
 - Refused/Not applicable (DNRO)
- Q.2** Do you expect your total investment next year to increase or decrease relative to this year? (i.e. 2022 vs 2021). It will...
- Increase
 - Remain unchanged
 - Decrease
 - Refused/Not applicable (DNRO)
- Q.3** Which of the following categories of investment activity are you carrying out this year? (2021) **READ OUT. MULTICODE**
- Replacement of worn-out buildings, equipment and IT
 - Extension of capacity for existing or new products/services
 - Investment designed to streamline processes
 - Other investment objectives (regulatory obligations, safety etc.)
 - Refused/Not applicable (DNRO)

Q.4 Which of the following categories of investment activity do you plan to do next year? (2022) **READ OUT. MULTICODE**

- Replacement of worn-out buildings, equipment and IT
- Extension of capacity for existing or new products/services
- Investment designed to streamline processes
- Other investment objectives (regulatory obligations, safety etc.)
- Refused/Not applicable (DNRO)

Q.5 What main factors are driving your investment activity this year? (2021) **READ OUT. MULTICODE**

- Demand for your services (sales)
- Financial conditions
- Technical factors (this includes the impact of technological changes such as the need to upgrade equipment and the availability of skilled labour)
- Other factors (this includes public policy e.g. tax, government spending, regulation; uncertainty about economic policy, and other factors relevant to your firm or sector)
- Refused/Not applicable (DNRO)

Q.6 What main factors are driving your investment decisions for next year? (2022) **READ OUT. MULTICODE**

- Demand for your services (sales)
- Financial conditions
- Technical factors (this includes the impact of technological changes such as the need to upgrade equipment and the availability of skilled labour)
- Other factors (this includes public policy e.g. tax, government spending, regulation; uncertainty about economic policy, and other factors relevant to your firm or sector)
- Refused/Not applicable

Q.7 How would you intend to finance any future investment? **READ OUT. MULTICODE**

- Internal funds (retained earnings, proprietors' funds)
- Bank loan
- External investor
- Market based financing (e.g. issuance of shares/bonds)
- Leasing
- Other
- No future investment plans

IF FRESH

Q.ROK1 Can I please confirm your details? **CHECK DETAILS SUCH AS NACE CODE AND COUNTY ARE CORRECT AND UPDATE IF NEEDED**

IF PANELLIST

Q.ROK2 UPDATE RESPONDENT DETAILS IF THE RESPONDENT PROMPTS THERE HAS BEEN CHANGES

ASK ALL

Q.W Can I ask the age of the business?

- Less than 2 years
- 2 to 5 years
- 6 to 10 years
- 11 to 15 years
- More than 15 years
- Don't know



Q.X Can I confirm that there are (FROM SAMPLE) employees in your company?

OPTION TO CHANGE NUMBER OF EMPLOYEES

IF PANELLIST

Thank you for taking part, your help in this European-wide study is greatly appreciated.

IF PANELLIST (DNRO)

Q.(i) Does the respondent want to be taken off the panel/ not contacted again?

- Yes – remove
- No

INTERVIEW ENDS FOR PANELLIST

IF FRESH

Q.Y Does your business engage in international trade, by this we mean does it export or import goods or services?

- Yes
- No

Q.Z Is your company.....

- Irish owned
- Foreign owned

Q.A Thank you for taking part. The Study is conducted monthly and those taking part will be sent a note on the key findings every month for the Services Sector by Bank of Ireland who are supporting the survey in Ireland. Would you be available to take part in future confidence studies?

Agree ACTIVE.....	
Refuse DECLINE	

Q.B Would you prefer to receive a copy of the results by post or email?

- Post
- Email
- Prefer not to receive

IF EMAIL, COLLECT EMAIL ADDRESS CAREFULLY:

Q.C Can I take down your Email address? **(PLUS CONFIRMATION OF EMAIL)**

--	--

FOR THOSE WHO ANSWERED “AGREE” AT QA.

Thank you for taking part, your help in this European-wide study is greatly appreciated.