

Confidential

Service sector survey

Number 75 May 2017

Office use only:

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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 manufacturing conditions.

Please answer on behalf of your UK manufacturing operations only. If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

Please submit your response using one of the following options:

- By email – contact surveymanagementgroup@cbi.org.uk for an electronic questionnaire to complete
- By fax to 020 7836 1210 or 020 7836 5856
- Post your response (address at bottom of page).

Closing date: *Friday 12 May 2017.*

Thankyou very much in advance for your response.

Anna Leach – head of economic intelligence

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

trend over the next three months

- up same down n/a 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

trend over the next three months

- up same down n/a up same down n/a

Please complete and return to the
CBI survey management group by **Friday 12 May 2017**

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.

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- 82.1 Office administrative and support activities
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- 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**

Thank you for completing the survey



Confidential

Service sector survey

Number 119 July 2017

Office use only:

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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. Please answer on behalf of your UK services operations only. If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

Please submit your response using one of the following options:

- By email – contact surveymanagementgroup@cbi.org.uk for an electronic questionnaire to complete
- By fax to 020 7836 1210 or 020 7836 5856
- Post your response (address at bottom of page).

Closing date: *Friday 14 July 2017*

Thankyou very much in advance for your response.

Anna Leach – head of economic intelligence

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 **Friday 14 July 2017**

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 and the following 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"/>
Following 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"/> %					Following 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"/>
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"/> %							

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

Yes No

If yes – 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)

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 £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

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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

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

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- 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**

Confidential

Service sector survey

Number 118 June 2017

Office use only:

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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.

Please answer on behalf of your UK services operations only. If you have any questions, please do not hesitate to contact us at surveymanagementgroup@cbi.org.uk

Please submit your response using one of the following options:

- By email – contact surveymanagementgroup@cbi.org.uk for an electronic questionnaire to complete
- By fax to 020 7836 1210 or 020 7836 5856
- Post your response (address at bottom of page).

Closing date: *Wednesday 14 June 2017.*

Thankyou very much in advance for your response.

Anna Leach – head of economic intelligence

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 14 June 2017**

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 separate sheet)

Thank you for completing this survey.

Comments



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

Product code: 11876