

3.0. ANNEX 3

This Annex contains the following three documents:

- (i). Draft Questionnaire (2000 survey);
- (ii) Final Questionnaire (2000 survey).
- (iii) Final Questionnaire (2007 survey)

(i) Draft Questionnaire (2000 survey)

SURVEY OF UK KNITTING MANUFACTURERS WHO EXPORT

In Strictest Confidence:

(A) What do you consider to be the greatest challenge now facing UK knitting exporters? What should be done to meet it and by whom?

.....
[NOTE: .This is the draft survey questionnaire that was pre-tested.. See Chapter 3. Letters or figures in bold below, apart from main section headings, indicate broadly where this version has been modified to produce the final questionnaire..In some cases section sequences have been changed. As will be seen, in general the changes made have been primarily presentational, aimed at shortening the document and enhancing its clarity and simplicity].....
.....
.....

(Please continue overleaf if there is insufficient space here)

(A1) Particulars Of The Company

1. **Company Reference No**.....
2. **Turnover (£m)**.....and 5-year trend: Declining // Static // Increasing // Other (please identify) //
3. **No of employees**.....
4. **Status Of Company:** Independent // Subsidiary of a Group // Other (please identify) //.....
5. **Ownership of the firm?:** UK // Other EU // **USA** //; Other //
6. **Form Of Production:** Own factory // Outworkers// Other //.....
7. **Proportion of total Co sales that are produced in:** the UK (%)..... Abroad (%).....
If there is some `abroad`, in whose factories is it produced? Own // Subcontractors' //; Both //
8. **Directors:** (a) No of Ds..... (b) Directors' Titles.....
.....
9. **Does the firm prepare a formal (written) strategic plan?** Yes// No//.
If so, who does this.....and how often is it done.....years?

(B) The Firm's Main Technology. Which of the following does the firm have and use ?

1. **Electronic Knitting Machinery** Yes//; No //; N/ Applicable //
2. **Computer Assisted Design (CAD)** Yes//; No //; N/ Applicable //
3. **Fully Integrated Computerised MIS*** Yes//; No //
4. **Internet Presence** Yes// No //
- (a) **Electronic Data Interchange (EDI)+** Yes// No //

- (b) E-Mail Yes //; No //
- (c) Co Web Page Yes // No //
- 5. Facsimile Yes // No //
- 6. Other (please identify).. Yes // No //

(* MIS=Management Information System. EDI = for online communication, mainly with raw materials suppliers, retailers and intermediaries.Eg availability, sales data, re-order, call-off, invoicing)

Comments:

.....

- 7. What share, if any, of turnover is E-Commerce?..... % None //
- If you use E-Commerce, is it with: UK customers only //; Foreign customers only // Both // ?
- Is the E-Commerce share of turnover: Increasing // Static // Declining // ?

(C) Knitted Products And Their Characteristics

- 1.. PRODUCTS: Gender* Fashion Content* Price Level* Fibre* Brand/Contract* ?
- Hosiery //.....
- Outerwear //.....
- Underwear //.....

[Please code product characteristics as one or more of : MWC (Gender); LMH (F/Content & Price); N(natural), B(lends), M(anmade) (Fibre) ; and B, C, or B+C (Brand and/ or Contract)]

- 2. Does the firm's staff include a **certificated** designer? Yes // No //
- 3. Does the firm have its own design department? Yes // No //
- 4. Do you design separately for your export markets? Yes // No //
- 5. Is there a formal product development process? Yes // No //
- If there is, which departments participate?.....
- 6. Which of the product's characteristics are thought to make it attractive to customers?

(D) Exports: History, Scale, Trends And Other Aspects

- 1. If known, why did the firm begin exporting..?.....
- 2. Number of years the firm has been exporting?.
- 3. Has it been a continuous exporter over that period? Yes //; No //
- If not, when was the interruption and how long did it last.....(Years)?
- 4. What proportion of turnover is currently exported.....(%)?
- 5. What has been the trend in your exports over the past 5 years?
- 1. Strong decline // 2. Decline // 3. Static // 4. Increase // 5. Strong Increase //
- 6. Other (please say which).....

How do you account for that?.....

- 6. What is the firm's export policy?
- 1. Reduce exports //; Hold share of turnover //; Increase exports //; Other // (please say what)
-
- 7. Who organises export shipments? Firm // Customer // Both, varying with market //
- How are exports shipped? By sea // By air // By rail // Varies with export market //

(E) Export Markets Served & Trends In Markets And Products .

*(Full lists of markets are essential to this research. Please treat **all** EU member states as separate markets; and ignore any indirect exports of your products eg via UK retailers with overseas branches.If possible, list export markets in descending order of importance).*

1. **Total** number of export **markets** served.....?

2. **What** are the names of these countries individually?

.....
.....
.....
.....

3. What changes, if any, have there been in the number of export markets over the past 5 years?

1. None //; 2. Lost some //; 3.Gained some //; 4. Lost & gained some //; 5. Other //

4. What number of exports markets.....do you consider right for your firm? Why is this?

5. **Which** export markets have you served for 5 years or longer?.....

.....
.....

6. In your export markets which main types of retailer sell your garments?

Supermarkets //, Chain stores //, Department stores //; Speciality stores //, Other (state which)

.....
.....

7. What were the main changes, if any, over the past 5 years in the **products** exported?

1. None //; 2. New products //; 3.Wider range //; 4.More fashion //; 5. Higher **prices** //

6. More natural.fibre //; 7. Other (please say what) //.....

(Tick one or more as appropriate/ relevant).

(F) Market Selection Methods Used (Formal/ informal).

*(Formal methods include eg assessment of foreign market potential through the analysis of their trade statistics; **informal methods** include speculative visits to retailers, meetings at trade fairs etc.).*

1. How did your firm select/ come to be selling to its present export markets?

Method: 1. Formal //; 2. Informal //; 3. Both //; 4. **Other (please say which)**.....

2. If you answered 'Both', about what proportion of the total was formal (%).....?

3 If **informal** methods were used, was this: in the UK //; Abroad //; Both // . ?

4. If selection methods were informal, was the approach made by:

1. The firm // 2. **Agent** // 3. Fgn Retailer //; 4.Other (please say which)?.....

5. How do you now sell abroad? Export Mgr //; UK Sales Force //; Comm Agent //; Other (state which)

.....
.....

(G) Marketing And Distribution Channels

(Please tick one or more channels, as appropriate, for your main markets)

1.Market (name) UKBO Fgn BO C/Agent Imp/ Distr . Direct Other
(please specify)

.....
.....
.....
.....

3. What quotation terms (FOB, CIF, FD etc.) are used.....? Which is most common?.....
4. What are your pricing objectives? Market share // Profitability (ROI+) // Other (please state)
5. **By whom** are export prices set? Firm alone // Firm/customer* negotiations // Some of Both // Other (please describe) //.....
 If by negotiation, does the firm find itself: Weaker // Equal to // Stronger // than the customer?
6. What is the **basis for pricing**? All costs plus percentage markup // Market price given, minimise costs / /
 Other (please describe //.....
 (* **'Customer'** is the commercial purchaser, not the final consumer. + ROI=Return on Investment).

(N) Export Performance And Profitability

1. Do you assess **separately** your firm's export performance? Yes // No //
2. If so, do you analyse? Sales Volume Yes // No // Profitability Yes // No // Both Yes // No //
3. Is any such analysis done? Overall // By market // By product // All 3 //
4. How do your export markets' sales margins compare with those obtainable in the UK?
Lower // Same // Some **Lwr/Some Higher** // Higher //; Much Higher //; Other /
 /.....
5. How profitable are your exports?
 1. Low // 2. Fair // 3. Average // 4. Good // 5. High //

(O) Possible Obstacles To Exporting

If you find any of the following obstacles to exporting, please tick.

1. Tariff and Non-tariff Barriers? Yes //; No // . If 'yes', in which export markets?.....
2. Competition in export markets? Yes // No // . If 'yes, in which markets and which exporters?
3. Exchange Rates Yes //; No // . If so, which currencies?.....
4. Payments Delays? Yes //; No //; If so, which countries?.....
5. Lead Times? Yes //; No //; If yes, which countries?.....
6. **Order Sizes**? Yes //; No //; If so, which countries?
7. Colouring? Yes //; No //; If yes, which countries?.....
8. **Other** (please identify).....

If any of the above are problems, what action if any have you taken to deal with them?

How effective has that been?.....

(P) Communication & Promotion (Note: Major restructuring of this section made)

1. If a branded producer, does your firm promote by advertising via overseas media? Yes // No // . If 'yes', which channels are used? Radio // TV // Leading magazines // Other printed media Yes // No // Other (please identify).....
2. Do you assess the effectiveness of such advertising? Yes // No //
 If you do, which kind of media is most effective?.....
3. If your firm **produces on contract**, what kind (s) of extra activities, if any, does it use to promote its products?
- Do you assess their effectiveness? Yes // No // . If so, how effective are they?.....

4. On average how often each year, if at all, are overseas customers visited by company reps#?.....
 5. How often is the firm visited in the UK by representatives of overseas customers?....Times. Not at all / /
 6. On average how many man-days a year does the firm spend promoting its products abroad?.. / ..man-days
 7. How important are the Internet/ EDI to good communication with your customers?
 1. Not very important //
 2. Important //
 3. Very important //
- (# To include Commission Agents).

(Q) Firm's Own Perceptions

1. How, if at all, have your exports been affected by the completion of the Single Market?.....

2. What main trends do you observe in your export markets as a whole?

3. How, if at all, do you see these trends affecting your firms exports over the next five years? And those of your main competitors?.....

(If more space is needed, please continue below)

Thank you very much for providing so much valuable information. It will be treated as strictly confidential. Kindly check again to ensure that all of the questions have been answered and then return the completed document to Owen Murphy in the enclosed SAE..

(ii) Final Questionnaire (2000 survey)

SURVEY OF UK KNITTING MANUFACTURERS WHO EXPORT
In Strictest Confidence:

No.....

The Company's Perspective

What do you consider to be the greatest challenge now facing UK knitting exporters? What should be done to meet it and by whom?

.....

(Please continue overleaf if there is not enough space here)

(A) Particulars Of The Company

1. Turnover £[] (m) & 5-year trend: *(Please circle one number on the scale)*

Static
 Strong Decline | 5 4 3 2 1 0 1 2 3 4 5 | Strong Growth

2. No of employees ? Now [] 5 Years ago []

3. Status Of Company? Independent Subsidiary of a Group Other (please identify)

[].....

4. Ownership? UK Other EU Other

5. Form Of Production: Own factory Outworkers Other

6. Shares of total Co sales that are produced in: the UK (%) [] Abroad (%) []

If there is some `abroad`, in whose factories is it produced? Own Subcontractors' Both

7. Directors: (a) No of Ds [] (b) Their Job Titles.....

8. Does the firm prepare a formal (written) strategic plan? Yes No

If so, who does this.....and how often is it done? Every [] year (s)

(B) The Firm's Main Technology. Which of the following does the firm have and use ?

1. Electronic Knitting Machinery Yes No N/ Applicable

2. Computer Assisted Design (CAD) Yes No N/ Applicable

3. Fully Integrated Computerised MIS* Yes No

4. Internet Presence Yes No

(a) Electronic Data Interchange (EDI)+ Yes No

(b) E-Mail Yes No

(c) Co Web Page Yes No

5. Facsimile Yes No

6. Other (please identify).. Yes No

(MIS=Management Information System.+ EDI = for online communication, mainly with raw materials suppliers, retailers and intermediaries.Eg availability, sales data, re-order, call-off, invoicing)*

7. What share, if any, of turnover is E-Commerce? []% None .

If you use E-Commerce, is it with: UK customers only Foreign customers only Both ?

Is the E-Commerce share of turnover: Increasing Static Declining ?

(C) Knitted Products And Their Characteristics

1.. PRODUCTS: Gender Fashion Content Price Level Fibre Brand/Contract?

Hosiery

Outerwear.....

Underwear.....

[Please code product characteristics as one or more of : MWC (Gender); LMH (F/Content & Price); N(natural), B(lends), M(anmade) (Fibre) ; and B, C, or B+C (Brand and/ or Contract)]

2. Does the firm's staff include a qualified designer? Yes No

3. Does the firm have its own design department? Yes No

4. Do you design separately for your export markets? Yes No

5. Is there a formal product development process? Yes No

If there is, which departments participate?.....

6. Which of the product's characteristics are thought to make it attractive to customers?.....

- Economies of scale
- Spreading risk
- Disposal of surplus stock
- Fashion trends feedback
- Other trends feedback
- Other benefits (please identify).....

(I) Organisation For Exporting

1. How is your firm organised for exporting? Does it have all/ any of the following?
 Special export department? Yes No If yes, what services does it provide?

 Special production lines? Yes No
 Special staff skills? * Yes No . If so, what are these skills?

2. Do you have an export manager? Yes No If not, who is in charge of exports?

3. Is there a separate budget for exports? Yes No
4. Are formal export market plans prepared? Yes No . If so, by whom?.....
5. Which step in the planning process do you find the most difficult?.....

6. Are export sales forecasts prepared? Yes No . If so, is this done separately for each export market?
 Yes No

(J) Product Pricing Methods And Conditions

1. What are your pricing objectives? ROI* Market share Other (please describe).....

2. Do you price separately for each export market? Yes No . If not, what do you do?

 Does separate pricing, if any, reflect: Cost variations only ? Pricing policy only ? Both ? Other ?
3. How do you calculate export prices? Cost plus* Market based * Other (please describe)

4. Do you price/ invoice in: Sterling Local currency Both Other (please identify).....?
- Which currency is dominant:? £ Local currency Equal Other
 Do you cover forward against exchange rate risk? Yes No

(Overl)

5. Which quotation terms apply (eg FOB, CIF, FD*).....and which is most common.....?
 6. In price negotiations does the firm usually find itself: Weaker Equal to Stronger than the Customer* ?

(* ROI = Return On Investment (Profit); Cost plus = Marginal or full cost plus fixed percentage margin;
 Market based = Final price set in line with the firm's costs, pricing objectives and market demand/
 competition; FD = Franco domicile; Customer = the commercial purchaser, not the final consumer)

(K) Export Performance And Profitability

1. Do you assess separately (from UK market sales) your firm's export performance? Yes No
2. Is any such analysis done? Overall By market By product All of these
3. Do you analyse? Sales Volume Yes No Profitability Yes No Both Yes No
4. Overall, how do export sales margins compare with those in the UK? *(Please ring one number).*

Same

Much Lower Much higher

5 4 3 2 1 0 1 2 3 4 5

5. How profitable are your exports overall? *(Please tick one box)*
1. Low 2. Fair 3. Average 4. Good 5. High

(L) Export Markets: Firm's Main Sources Of Information On Market Trends & Needs

1. Formal Market Research? Yes No Rank
2. Participation in inward and outward trade missions? Yes No
3. Visits to Trade Fairs/Exhibitions? Yes No
4. Visits to retail stores in overseas markets? Yes No
5. Feedback, from:
 - (a) Marketing & Distribution intermediaries? Yes No
 - (b) Final retail customers? Yes No
 - (c) Other feedback (pse state which)?..... Yes No
6. Trade press, newsletters and similar? Yes No
7. Other sources? If so, which?.....

(Please indicate your best 3 sources in rank order, with No 1 being the most useful)

(M) Main External Services Used And Their Value

If you use any of the following external services to UK exporters, how do you rate them?

Organisation	Services (please say which)	Usefulness?
<input type="checkbox"/> BKCEC
<input type="checkbox"/> Trade Partners
<input type="checkbox"/> ECGD
<input type="checkbox"/> UK Embassies
<input type="checkbox"/> Chambers of Commerce
<input type="checkbox"/> Other (please specify)

(Please indicate which services of these bodies are used and score these for usefulness:

**VU= very useful; U = Useful; NVU = Not very useful.)*

(N) Possible Obstacles To Exporting

If you find any of the following obstacles to exporting, please tick.

1. Tariff and Non-tariff Barriers? Yes No If 'yes', in which export markets?.....
2. Competition in export markets? Yes No . If 'yes, in which markets?.....
3. Exchange Rates Yes No . If so, which currencies?.....
4. Payments Delays? Yes No If so, which countries?.....
5. Lead Times? Yes No If yes, which countries?.....
6. Small Order Sizes? Yes No If so, which countries?
7. Colouring? Yes No If yes, which countries?.....
8. Finance for exports? Yes No If so, which countries?

