

Department for
Business, Innovation,
Science and Trade

International Buyers and Investors Study 2024

Technical report

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2 Methodology note

In July 2026, the government created a new department called The Department for Business, Innovation, Science and Trade (BIST). The new department includes the former Department for Business and Trade (DBT) with parts of the former Department for Science, Innovation and Technology (DSIT) and the Investment Security Unit. The Department for Business, Innovation, Skills and Trade (BIST) brings together the UK's strengths in science, technology and innovation with the government's economic and industrial priorities. The new department has greater power to drive investment, support innovation and remove barriers holding back growth.

The International Traders and Investors Study (IBIS) was commissioned by the then Department for International Trade (DIT). DIT later became part of DBT, which is now part of BIST.

This report sets out the technical design and implementation of the second wave of the International Traders and Investors Study (ITIS) conducted by Populus in 2019.

2.1 Objectives

The core responsibilities for the Department for Business and Trade (DBT) include developing new trade and investment policies to promote UK businesses globally and providing support for the GREAT Trade and Investment Campaign, which promotes the UK as an attractive destination for high-value investment and a leading source for high-quality and innovative brands, goods and services. It supports several government ambitions under the themes of international trade and Global Britain, both of which are at the heart of the Industrial Strategy. Specifically, the campaign aims to deliver on the following objectives:

- raise or maintain investors' propensity to expand or invest in the UK
- increase or maintain investors' recognition of the GREAT campaign
- increase or maintain the proportion of investors (who also recognise the campaign) who agree that the campaign made them think now was a good time to invest in the UK
- raise or maintain buyers' propensity to buy goods and services from UK suppliers
- increase or maintain buyers' awareness of the GREAT campaign
- increase or maintain the proportion of buyers (who also recognise the campaign) who agree that the campaign motivates them to do business with the UK
- generate foreign direct investment (FDI) project leads for DBT's international pipeline
- generate a pipeline of export opportunities

To help meet these objectives, Yonder conducted 4,035 interviews with businesses that have the potential to buy from and/or invest in other countries. Fieldwork took place in 16 markets: France, Germany, the United States of America (USA), Japan, China, India, the United Arab Emirates (UAE), South Africa, Brazil, Turkey, Canada, Mexico, South Korea, Australia, Nigeria, and Saudi Arabia. The survey was conducted using CATI (Computer Assisted Telephone Interviewing) by our fieldwork partner, between 21 October 2024 and 10 February 2025.

2.2 Sampling

2.2.1 Sampling population

The research focused on the campaign's target audiences, that is, businesses that met the following criteria:

- profit making organisations with an annual turnover of at least $2,000,000 USD; organisations defined as 'Public Corporation', 'Central Government', 'Local Authority' and 'Non-profit body or Associations' were excluded
- had at least 10 employees across the whole organisation including in other countries
- said that they had previously, or were likely to, buy and/or invest internationally in the future

Businesses were selected for inclusion in the sample if they met criteria 1 and 2 (this information was included in the sample frame). Interviewers also verified this information at the start of the interview. Businesses were screened in the interview on the third criteria, of which outcomes are detailed under 'Sample selection'.

2.2.2 Sampling frame

The sample was drawn from Dun and Bradstreet, a commercially available international database of businesses. This frame was chosen in order to use a consistent sample frame to match the previous surveys. It is comprehensive in each of the markets, and ensures the ability to replicate the same methodology in potential future studies.

2.2.3 Sample design

This study is not intended to be a representative survey of all businesses within the target markets. In part, this is because there are no known business databases that fully reflect the business landscape of each of the markets targeted in this study. Another reason for this is the prohibitive resource that would be needed to collect a population representative sample for each market. Instead, this study is designed to be representative of businesses which met the 3 eligibility criteria above to be consistent over the 7 years (2018 to 2024).

This was a quota survey. Quotas were set on turnover (under and over $50,000,000) and sector to reflect the overall population of businesses in each market and quotas based on the 2023 final set of interviews achieved. This was consistent with the approach adopted in the 2018, 2019, 2020, 2021, 2022 and 2023 surveys. During fieldwork, the rates of sample incidence[1] informed adaptive quotas so more accurate targets could be set by size and sector.

Initial incidence rates in this study were informed by incidences obtained from the previous wave in 2023. As the incidence of businesses that had previously or were likely to buy or invest internationally varied considerably by sector, size and market, it was not possible to set precise

[1] The proportions of different types of businesses who were found to be eligible to participate in the study.

quotas by turnover and sector. Instead, the quotas acted to ensure that the sectoral profile of the businesses that were contacted was representative of the sectoral make-up of the Dun and Bradstreet sample frame for the key markets. Businesses were then asked several screening questions to identify whether they met criterion 3 and were therefore eligible to take part in the survey. This process is outlined in more detail in the following sections.

The Dun and Bradstreet business database, featuring sample listings of businesses and contact details, was used to identify contacts that satisfied the targetable eligibility criteria for this study. The sample listings included details by SIC code and within a specific geographic region. In each market, the sample was stratified by industry sector and number of employees prior to selection. A sample of businesses was selected in each market, representative of population data provided by Dun and Bradstreet of all contactable businesses on their database. Three batches of randomised sample were drawn from the list and then released throughout the fieldwork period.

Prior to contacting potential respondents, interviewers reviewed online executive profiles for additional information available about each record. In some instances, searches were run through websites, such as LinkedIn and ZoomInfo, to bolster review efforts. Reading through a contact's overview page and their past roles can help in building rapport and increases their likelihood of participation. However, if no further information could be obtained about a business or the respondent, they were not excluded from the potential pool of interviews and were contacted as normal. This approach was first carried out in 2019, with approximately 5% of all interviews, while the approach was carried out on around 40% to 50% of all interviews between 2020 to 2024 tracking.

2.2.4 Sample selection

In total, 90,581 businesses were selected from the Dun and Bradstreet database in 2024. Table 1.1 shows the total sample drawn by market.

The sample for each market was allocated into random batches and released gradually during fieldwork; subsequent batches were released when the live sample was exhausted. Each sample record was contacted at least 4 times, at different times/day of the week.

Table 1.1 Number of Dun and Bradstreet records by market

COUNTRY	TOTAL
Brazil	6,000
Canada	6,000
China	6,000
France	6,000
Germany	6,000
India	6,000

COUNTRY	TOTAL
Japan	6,000
South Africa	6,000
Turkey	6,000
UAE	6,000
USA	6,000
Mexico	6,000
South Korea	6,000
Australia	6,000
Nigeria	3,073
Saudi Arabia	3,508
TOTAL	90,581

As Table 1.1 shows, 6,000 records were drawn for each market in total except Nigeria and Saudi Arabia, for which 3,073 and 3,508 records were drawn, respectively. This reflects the size of the business universe in Nigeria and Saudi Arabia after removing businesses for which telephone contact and senior decision maker information was unavailable (the total size of the business universe in Nigeria and Saudi Arabia at the time of drawing the sample was 3,212 and 21,006[2] respectively).

In each market, the sample was stratified by turnover and sector prior to selection. A sample of businesses were selected in each market, representative of population data provided by Dun and Bradstreet, of all businesses on their database that were profit making, with at least 10 employees, and made at least $2,000,000 USD annual turnover. The population from which the sample was drawn based on these criteria is presented in Table 1.2, Table 1.3, and Table 1.4 below.

Table 1.2 Dun and Bradstreet population profile for each market (by sector)[3]

SECTOR	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
A - Agriculture, Forestry & Fishing	76	1%	114	2%	27	0%	110	2%	35	1%	61	1%	25	1%

[2] Although the full Saudi Arabia business universe was 21,006, the amount of those records that had a telephone and a named Senior Decision Maker was 3,508.

[3] Dun and Bradstreet use the US 1987 SIC Major Industry Sector classification for countries outside of the UK. Dun and Bradstreet databases contain data collected worldwide and thus use a universal US 1987 SIC classification as opposed to UK specific classification only.

SECTOR	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
B - Mining & Quarrying	38	1%	96	2%	61	1%	28	0%	14	0%	134	2%	9	0%
C - Manufacturing	1,562	25%	778	13%	3,020	50%	1,179	20%	2,246	37%	1,330	23%	967	15%
D - Electricity, Gas, Steam & Aircon	51	1%	20	0%	77	1%	15	0%	84	1%	53	1%	17	0%
E - Water, Sewerage & Waste	30	1%	36	0%	38	1%	11	0%	68	1%	25	0%	63	1%
F - Construction	365	6%	617	10%	285	5%	852	14%	251	7%	419	7%	951	18%
G - Wholesale, Retail & Motor Repair	2,269	38%	1,566	28%	1,273	21%	1,785	30%	757	16%	2,661	42%	1,288	21%
H - Transport & Storage	375	7%	285	5%	226	3%	367	6%	263	4%	198	3%	326	7%
I - Accommodation & Food Service	43	1%	200	3%	59	1%	200	2%	57	1%	13	0%	146	2%
J - Information & Communication	94	2%	233	3%	159	2%	138	3%	285	4%	312	6%	241	4%
K - Finance & Insurance	171	2%	345	6%	85	3%	179	3%	597	9%	161	3%	124	2%
L - Real Estate	67	1%	144	3%	247	4%	64	1%	45	1%	61	1%	179	3%
M - Professional, Scientific & Technical	169	2%	489	8%	169	3%	389	7%	403	6%	216	3%	167	2%
N - Admin & Support	46	1%	25	0%	3	0%	68	1%	41	1%	27	1%	73	1%
P - Education	87	2%	98	2%	23	0%	57	1%	61	1%	62	1%	83	1%
Q - Health & Social Work	186	3%	322	5%	60	1%	264	4%	545	7%	75	1%	802	12%
R - Arts, Entertainment & Recreation	42	1%	126	2%	17	0%	36	1%	23	0%	35	1%	93	2%
S - Other Services	329	6%	506	7%	171	3%	258	4%	225	4%	157	3%	446	7%

SECTOR	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

SECTOR	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
A - Agriculture, Forestry and Fishing	318	3%	46	1%	9	0%	63	1%	117	2%	43	1%	87	2%
B - Mining and Quarrying	147	3%	45	1%	145	2%	51	1%	59	1%	15	0%	124	2%
C - Manufacturing	674	8%	2,693	42%	956	15%	967	15%	1,809	29%	2,601	44%	898	17%
D - Electricity, Gas, Steam and Aircon	29	0%	28	1%	14	0%	34	1%	32	0%	14	0%	43	1%
E - Water, Sewerage and Waste	2	0%	8	0%	13	0%	44	1%	21	1%	75	1%	39	1%
F - Construction	662	11%	267	6%	331	6%	695	11%	512	8%	811	13%	671	11%
G - Wholesale, Retail and Motor Repair	1,095	13%	2,111	35%	2762	48%	1,106	22%	1,952	34%	967	17%	1,149	20%
H - Transport and Storage	39	1%	334	6%	465	7%	222	3%	356	6%	263	5%	260	5%
I - Accommodation and Food Service	198	3%	59	2%	97	2%	161	3%	69	1%	47	1%	316	5%
J - Information and Communication	67	1%	56	1%	310	3%	271	4%	146	3%	251	4%	304	4%
K - Finance and Insurance	821	18%	70	1%	184	3%	313	6%	149	3%	83	1%	247	4%
L - Real Estate	4	0%	7	0%	10	0%	114	2%	27	1%	70	1%	343	4%
M - Professional, Scientific & Technical	26	0%	90	2%	223	4%	468	8%	382	6%	224	3%	519	9%
N - Admin and Support	1	0%	2	0%	10	0%	33	1%	23	0%	29	0%	79	1%

SECTOR	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
P - Education	72	2%	11	0%	21	1%	353	5%	43	1%	68	1%	129	2%
Q - Health and Social Work	315	5%	62	1%	41	1%	706	11%	52	1%	139	2%	315	5%
R - Arts, Entertainment and Recreation	28	0%	10	0%	10	0%	63	1%	23	1%	51	1%	132	2%
S - Other Services	1,502	31%	101	2%	399	6%	336	5%	228	4%	249	4%	345	6%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

SECTOR	NG (N)	NG (%)	SA (N)	SA (%)	TOTAL (N)	TOTAL (%)
A - Agriculture, Forestry and Fishing	63	1%	11	0%	1,205	1%
B - Mining and Quarrying	839	21%	80	2%	1,885	2%
C - Manufacturing	414	14%	1,062	27%	23,156	25%
D - Electricity, Gas, Steam and Aircon	28	1%	19	0%	558	1%
E - Water, Sewerage and Waste	1	0%	14	0%	488	1%
F - Construction	151	6%	448	12%	8,288	9%
G - Wholesale, Retail and Motor Repair	722	18%	831	29%	24,294	27%
H - Transport and Storage	185	5%	212	5%	4,376	5%
I - Accommodation and Food Service	34	1%	37	2%	1,736	2%
J - Information and Communication	110	4%	78	3%	3,055	3%

SECTOR	NG (N)	NG (%)	SA (N)	SA (%)	TOTAL (N)	TOTAL (%)
K - Finance and Insurance	148	5%	182	4%	3,859	5%
L - Real Estate	3	0%	9	0%	1,394	2%
M - Professional, Scientific & Technical	107	7%	186	6%	4,227	5%
N - Admin and Support	1	0%	5	0%	466	1%
P - Education	28	1%	10	0%	1,206	1%
Q - Health and Social Work	141	9%	32	1%	4,057	4%
R - Arts, Entertainment and Recreation	3	0%	2	0%	694	1%
S - Other Services	95	5%	290	7%	5,637	7%
TOTAL	3,073	100%	3,508	100%	90,581	100%

Table 1.3 Dun and Bradstreet population profile for each market (by business size)

BUSINESS SIZE	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
10 to 49	2,593	43%	4,631	77%	3,396	57%	4,514	75%	3,612	60%	4,577	76%	4,206	70%
50 to 249	2,640	44%	1,139	19%	2,018	34%	1,145	19%	1,490	25%	1,060	18%	1,443	24%
250 to 499	377	6%	99	2%	301	5%	160	3%	294	5%	169	3%	189	3%
500 to 999	216	4%	52	1%	171	3%	101	2%	332	6%	83	1%	86	1%
1,000 to 1,999	98	2%	41	1%	80	1%	52	1%	140	2%	54	1%	32	1%
2,000 to 4,999	43	1%	28	0%	21	0%	18	0%	75	1%	35	1%	26	0%

BUSINESS SIZE	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
5,000+	33	1%	10	0%	13	0%	10	0%	57	1%	22	0%	18	0%
TOTAL	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %

BUSINESS SIZE	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
10 to 49	5,224	87%	3,245	54%	3,344	56%	3,380	56%	1,719	29%	4,681	78%	3,959	66%
50 to 249	729	12%	2,091	35%	2,220	37%	1,895	32%	2,852	48%	1,082	18%	1,297	22%
250 to 499	39	1%	360	6%	215	4%	314	5%	704	12%	120	2%	229	4%
500 to 999	3	0%	163	3%	94	2%	184	3%	368	6%	67	1%	158	3%
1,000 to 1,999	1	0%	85	1%	48	1%	95	2%	179	3%	41	1%	122	2%
2,000 to 4,999	2	0%	37	1%	36	1%	75	1%	106	2%	7	0%	116	2%
5,000+	2	0%	19	0%	43	1%	57	1%	72	1%	2	0%	119	2%
TOTAL	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %

BUSINESS SIZE	NG (N)	NG (%)	SA (N)	SA (%)	N	%
10 to 49	2,062	67%	1,216	35%	56,359	62%
50 to 249	770	25%	1417	40%	25,288	28%
250 to 499	117	4%	297	8%	3,984	4%
500 to 999	55	2%	219	6%	2,352	3%

BUSINESS SIZE	NG (N)	NG (%)	SA (N)	SA (%)	N	%
1,000 to 1,999	29	1%	140	4%	1,237	1%
2,000 to 4,999	30	1%	136	4%	791	1%
5,000+	10	0%	83	2%	570	1%
TOTAL	3,073	100 %	3,508	100 %	90,581	100%

Table 1.4 Dun and Bradstreet population profile for each market (by annual turnover)

ANNUAL TURNOVER	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
$2,000,000 to $10,000,000	4,849	83%	4,398	72%	5,077	80%	4,060	68%	3,994	70%	5,174	87%	4,282	71%
$10,000,000 to $50,000,000	897	13%	1,277	22%	741	15%	1,376	24%	1,036	17%	616	11%	1,267	22%
$50,000,000 to $100,000,000	112	2%	151	3%	94	2%	294	4%	362	6%	88	1%	180	3%
$100,000,000 to $500,000,000	108	1%	129	3%	66	2%	217	4%	470	6%	89	1%	200	3%
$500,000,000 to $1,000,000,000	15	0%	26	0%	12	0%	23	0%	65	1%	16	0%	36	1%
$1,000,000,000 and over	19	0%	19	0%	10	0%	30	0%	73	1%	17	0%	35	0%
TOTAL	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %

ANNUAL TURNOVER	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
$2,000,000 to $10,000,000	5,775	96%	3,802	68%	4,508	72%	4,181	66%	3,738	61%	4,193	71%	4,224	70%
$10,000,000 to $50,000,000	211	4%	1,666	26%	986	18%	1,317	24%	1,651	28%	1,432	23%	1,052	18%

ANNUAL TURNOVER	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
$50,000,000 to $100,000,000	7	0%	271	3%	194	4%	198	4%	267	5%	189	3%	231	4%
$100,000,000 to $500,000,000	6	0%	214	2%	216	4%	205	4%	251	5%	140	2%	324	5%
$500,000,000 to $1,000,000,000	1	0%	26	0%	44	1%	42	1%	39	1%	25	0%	77	1%
$1,000,000,000 and over		0%	21	0%	52	1%	57	1%	54	1%	21	0%	92	2%
TOTAL	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %	6,000	100 %

ANNUAL TURNOVER	NG (N)	NG (%)	SA (N)	SA (%)	N	%
$2,000,000 to $10,000,000	2,575	84%	2,454	70%	67,284	74%
$10,000,000 to $50,000,000	343	11%	609	17%	16,477	18%
$50,000,000 to $100,000,000	57	2%	129	4%	2,824	3%
$100,000,000 to $500,000,000	56	2%	218	6%	2,909	3%
$500,000,000 to $1,000,000,000	20	1%	42	1%	509	1%
$1,000,000,000 and over	22	1%	56	2%	578	1%
TOTAL	3,073	100 %	3,508	100 %	90,581	100%

The eligibility rate for each sector (within each country) was closely monitored throughout fieldwork, and the target number of interviews adjusted to reflect the eligibility rate in the field. This process was repeated for the different sectors and the target for each sector was scaled to ensure that the total number of interviews met the overall target of 250 interviews per market. Conversion rates of the total loaded sample are shown below by sector (Table 1.5), business size (Table 1.6),

and annual turnover (Table 1.7), followed by definitions of each of the conversion stages. Further information on final sample outcomes can be seen in Table 1.8.

Table 1.5 Dun and Bradstreet population profile conversion rates (by sector)

SECTOR	TOTAL	Construction	Manufacturing	Other	Professional Services	Wholesale
Sample purchased	90,581	8,288	23,156	21,842	13,001	24,294
Unused sample	2,547	173	448	394	477	1055
Sent to number lookup	88,034	8,115	22,708	21,448	12,524	23,239
Successful lookup	88,034	8,115	22,708	21,448	12,524	23,239
Loaded to CATI	88,034	8,115	22,708	21,448	12,524	23,239
Total number of started surveys	43,487	3,897	11,929	8,767	6,551	12,343
Screened interviews	4,613	398	1,277	982	954	1,002
Partially completed interviews	578	53	147	107	135	136
Total completed interviews	4,035	345	1,130	875	819	866

Table 1.6 Dun and Bradstreet population profile conversion rates (by business size)

BUSINESS SIZE	TOTAL	10 to49 employees	50 to 249 employees	250 to 499 employees	500 to 999 employees	1,000 to 1,999 employees	2,000 to 4,999 employees	Over 5,000 employees
Sample purchased	90,581	56,359	25,288	3,984	2,352	1237	791	570
Unused sample	2,547	1,359	773	210	88	62	37	18
Sent to number lookup	88,034	55,000	24,515	3,774	2,264	1,175	754	552
Successful lookup	88,034	55,000	24,515	3,774	2,264	1,175	754	552
Loaded to CATI	88,034	55,000	24,515	3,774	2,264	1,175	754	552
Total number of started surveys	43,487	25,245	12,034	2,781	1,322	987	596	522
Screened interviews	4,613	1,752	1,188	566	400	258	214	235
Partially completed interviews	578	275	120	36	23	35	33	56
Total completed interviews	4,035	1,477	1,068	530	377	223	181	179

Table 1.7 Dun and Bradstreet population profile conversion rates (by annual turnover)

ANNUAL TURNOVER	TOTAL	$2,000,000 to $10,000,000	$10,000,000 to $50,000,000	$50,000,000 to $100,000,000	$100,000,000 to $500,000,000	$500,000,000 to $1,000,000,000	$1,000,000,000 and over
Sample purchased	90,581	67,347	16,392	2,838	2,915	507	582
Unused sample	2,547	2084	397	32	20	7	7
Sent to number lookup	88,034	65,263	15,995	2,806	2,895	500	575
Successful lookup	88,034	65,263	15,995	2,806	2,895	500	575
Loaded to CATI	88,034	65,263	15,995	2,806	2,895	500	575

ANNUAL TURNOVER	TOTAL	$2,000,000 to $10,000,000	$10,000,000 to $50,000,000	$50,000,000 to $100,000,000	$100,000,000 to $500,000,000	$500,000,000 to $1,000,000,000	$1,000,000,000 and over
Total number of started surveys	43,487	26,227	12,102	2,412	1,893	451	402
Screened interviews	4,613	1,854	1,201	753	401	201	203
Partially completed interviews	578	288	187	65	18	12	8
Total completed interviews	4,035	1,407	1,134	677	438	196	183

Sample purchased: total sample purchased; contact information is available for all records.

Unused sample: this is the remaining sample not used after meeting quota targets. This was established after looking up and dialling a total of 88,034 of the sample.

Sent to number lookup: number of records used to contact potential respondents with at least 1 attempt.

Successful lookup: number of records that were successfully looked up.

Loaded to CATI: number of records that were loaded to the computer-aided telephone interviewing system.

Total number of started surveys: total number of interviews after screening – includes total interview completes, partial interview completes, refusals, and respondents who do not meet criteria.

Screened interviews: number of respondents who qualify for survey and have taken part in an interview.

Partially completed interviews: number of respondents who only partially completed the survey – not included in the final survey data (total completes).

Total completed interviews: number of respondents who qualify for the survey and have fully completed an interview.

2.2.5 Business population

Large differences in business population counts across markets and sectors were observed, as drawn from the Dun and Bradstreet database, from 2018 to 2024. Overall, there was no consistent pattern in the differences between population counts between 2018 to 2019, 2019 to 2020, 2020 to 2021, 2021 to 2022, 2022 to 2023, and 2023 to 2024. For example, some sectors saw a significant reduction of businesses from 2021 to 2023 but saw a significant increase in the same sector moving into 2024. This pattern was not consistent across sectors within the same market or among other markets.

Counts information was drawn from the same source (Dun and Bradstreet) with the same definitions (businesses with at least 10 employees and annual turnover of at least $2,000,000 USD) using the same SIC definitions for sector grouping across waves. Dun and Bradstreet have confirmed that there has been no change to the SICs over the past year. All international data has historically been, and is still currently, segmented by US 1987 SIC, which is a standard static classification system. Dun and Bradstreet have also confirmed that they regularly update and clean their databases throughout the year. The Dun and Bradstreet global marketable file contains details relating to active trading companies known to Dun and Bradstreet. The database is limited to companies whose records Dun and Bradstreet have been able to obtain and verify through public sources, direct contact, and third parties. This means that Dun and Bradstreet has been able to ascertain that a business is actively trading, its location, the industry sector, and in most cases its size. Database populations will, therefore, change over time both as a result of increases or decreases in real life as well as and due to database management. Table 1.8 below includes the percentage change in population counts year-on-year.

Table 1.8 Population counts – percentage shift in counts year on year

SECTOR	FR 2020 to 2021	FR 2021 to 2022	FR 2022 to 2023	FR 2023 to 2024	CN 2020 to 2021	CN 2021 to 2022	CN 2022 to 2023	CN 2023 to 2024	JP 2020 to 2021	JP 2021 to 2022	JP 2022 to 2023	JP 2023 to 2024
Manufacturing	0%	-2%	-10%	1%	19%	47%	17%	22%	-2%	-43%	-21%	-3%
Construction	3%	-3%	-13%	-8%	118%	85%	14%	40%	2%	-23%	-15%	-13%
Wholesale, Retail and Motor Repair	7%	-6%	-19%	-6%	91%	57%	14%	40%	-2%	-34%	-10%	-2%
Professional services	8%	-5%	-23%	0%	106%	29%	8%	36%	1%	-20%	-6%	-1%
Other services	-1%	-15%	-14%	3%	48%	42%	13%	38%	0%	-18%	-5%	-20%
TOTAL	3%	-8%	-16%	-2%	54%	50%	14%	33%	0%	-26%	-10%	-12%

SECTOR	US 2020 to 2021	US 2021 to 2022	US 2022 to 2023	US 2023 to 2024	BR 2020 to 2021	BR 2021 to 2022	BR 2022 to 2023	BR 2023 to 2024	ZA 2020 to 2021	ZA 2021 to 2022	ZA 2022 to 2023	ZA 2023 to 2024
Manufacturing	-3%	0%	0%	-5%	-1%	21%	-4%	1%	19%	261%	111%	109%
Construction	-4%	0%	0%	-5%	-1%	55%	-9%	0%	9%	974%	106%	62%

SECTOR	US 2020 to 2021	US 2021 to 2022	US 2022 to 2023	US 2023 to 2024	BR 2020 to 2021	BR 2021 to 2022	BR 2022 to 2023	BR 2023 to 2024	ZA 2020 to 2021	ZA 2021 to 2022	ZA 2022 to 2023	ZA 2023 to 2024
Wholesale, Retail and Motor Repair	-4%	-1%	-1%	-8%	-1%	8%	-2%	3%	37%	161%	110%	66%
Professional services	-6%	1%	2%	8%	3%	51%	-7%	1%	155%	85%	59%	25%
Other services	-6%	0%	3%	13%	1%	65%	-5%	0%	51%	648%	120%	-1%
TOTAL	-5%	0%	1%	2%	0%	25%	-4%	1%	75%	306%	103%	28%

SECTOR	TR 2020 to 2021	TR 2021 to 2022	TR 2022 to 2023	TR 2023 to 2024	CA 2020 to 2021	CA 2021 to 2022	CA 2022 to 2023	CA 2023 to 2024	KR 2020 to 2021	KR 2021 to 2022	KR 2022 to 2023	KR 2023 to 2024
Manufacturing	0%	-18%	-45%	-13%	1%	0%	1%	1%	-	29%	4%	-8%
Construction	-2%	-15%	-54%	-35%	1%	2%	2%	3%	-	53%	5%	1%
Wholesale, Retail and Motor Repair	0%	-15%	-46%	-15%	1%	2%	2%	2%	-	19%	-7%	-11%
Professional services	3%	-19%	-56%	-16%	3%	2%	2%	3%	-	9%	-13%	2%
Other services	0%	-15%	-53%	-30%	1%	3%	1%	3%	-	-7%	10%	-1%
TOTAL	0%	-16%	-48%	-18%	2%	2%	1%	2%	-	20%	1%	-5%

SECTOR	MX 2020 to 2021	MX 2021 to 2022	MX 2022 to 2023	MX 2023 to 2024	AU 2020 to 2021	AU 2021 to 2022	AU 2022 to 2023	AU 2023 to 2024	NG 2020 to 2021	NG 2021 to 2022	NG 2022 to 2023	NG 2023 to 2024
Manufacturing	-	9%	9%	-2%	-	-8%	-5%	-3%	-	-	0%	-17%
Construction	-	7%	5%	-5%	-	5%	-9%	-2%	-	-	9%	-24%
Wholesale, Retail and Motor Repair	-	30%	6%	-14%	-	-10%	-5%	-4%	-	-	15%	8%
Professional services	-	19%	9%	0%	-	-6%	-4%	4%	-	-	-13%	-39%

SECTOR	MX 2020 to 2021	MX 2021 to 2022	MX 2022 to 2023	MX 2023 to 2024	AU 2020 to 2021	AU 2021 to 2022	AU 2022 to 2023	AU 2023 to 2024	NG 2020 to 2021	NG 2021 to 2022	NG 2022 to 2023	NG 2023 to 2024
Other services	-	26%	6%	-12%	-	-26%	-4%	-4%	-	-	5%	-14%
TOTAL	-	20%	7%	-8%	-	-14%	-5%	-2%	-	-	3%	-15%

SECTOR	SA 2020 to 2021	SA 2021 to 2022	SA 2022 to 2023	SA 2023 to 2024
Manufacturing	-	-	-	626%
Construction	-	-	-	531%
Wholesale, Retail and Motor Repair	-	-	-	162%
Professional services	-	-	-	158%
Other services	-	-	-	517%
TOTAL	-	-	-	390%

Brazil, South Africa, and Turkey were included in tracking for the first time in 2019, Canada was included in 2020, and Mexico, South Korea, and Australia were included in 2021, while Nigeria was included in 2022. Saudi Arabia was added to tracking the first time in 2023.

2.3 Questionnaire design

The questionnaire was developed in collaboration with DBT and was based on the 2023 IBIS questionnaire. A copy of the questionnaire is available in the appendix at the end of this document.

The questionnaire was translated into local languages, as well as being available in English in all countries. Table 1.9 below shows the proportion of languages used across interviews in each market. Interviewers were briefed by our fieldwork partner in their local languages. Interviewers received written briefing notes, a copy of the survey questionnaire, and a letter to send to respondents providing more information about the survey.

Table 1.9 Proportion of languages used in interviews across markets

COUNTRY	English	Arabic	French	German	Mandarin	Japanese	Portuguese	Turkish	Canadian French	Spanish	Korean
INDIA	100%	-	-	-	-	-	-	-	-	-	-
USA	100%	-	-	-	-	-	-	-	-	-	-
UAE	88%	12%	-	-	-	-	-	-	-	-	-
S. AFRICA	100%	-	-	-	-	-	-	-	-	-	-
CANADA	97%	-	-	-	-	-	-	-	3%	-	-
FRANCE	8%	-	92%	-	-	-	-	-	-	-	-
GERMANY	14%	-	-	86%	-	-	-	-	-	-	-
CHINA	-	-	-	-	100%	-	-	-	-	-	-
JAPAN	-	-	-	-	-	100%	-	-	-	-	-
BRAZIL	-	-	-	-	-	-	100%	-	-	-	-
TURKEY	-	-	-	-	-	-	-	100%	-	-	-
MEXICO		-	-	-	-	-	-	-	-	100%	-
SOUTH KOREA		-	-	-	-	-	-	-	-	-	100%
AUSTRALIA	100%	-	-	-	-	-	-	-	-	-	-
NIGERIA	100%	-	-	-	-	-	-	-	-	-	-
SAUDI ARABIA	91%	9%	-	-	-	-	-	-	-	-	-

The average interview length was 25 minutes. The minimum length was 20 minutes and maximum length was 45 minutes. Table 1.10 below outlines the questionnaire length by market.

Table 1.10 Questionnaire length

	OVERALL	FRANCE	GERMANY	USA	S. AFRICA	INDIA	JAPAN	CHINA	BRAZIL
AVG. LENGTH (MINS)	25	24	26	21	27	25	26	30	30

	UAE	TURKEY	CANADA	MEXICO	S. KOREA	AUSTRALIA	NIGERIA	SAUDI ARABIA	
AVG. LENGTH (MINS)	22	25	22	26	28	23	24	24	

2.3.1 Questionnaire content

The survey started with a series of screening questions to identify eligible businesses to complete the survey.

The following types of businesses were screened out:

- charitable organisations

- businesses with fewer than 10 employees
- businesses with an annual turnover of less than $2,000,000 USD (or equivalent in local currency)
- businesses who have not planned or do not plan to buy or invest internationally

Businesses that passed the screener were asked questions on these themes:

- awareness of promotional activity (unprompted)
- buying and Investment activities in the UK and competitor countries
- key attributes associated with the UK and competitor countries
- campaign awareness (prompted)
- awareness of DBT and key information sources
- knowledge and impact of free trade agreements/arrangements
- perceptions of a proposed self-service digital platform that investment businesses could use independently to help with completing investment projects in the UK

Respondents were classified as a 'buyer' or 'investor' based on their survey responses. They were then asked questions about their buying or investment intentions and their perception of the UK in relation to buying or investment. The aim was to achieve an approximately equal number of interviews about buying and investing. Businesses that were both a prospective buyer and investor were allocated to the group with the least number of responses within that market at the time of interview.

2.3.2 Currency conversions

Respondents were asked about their company's annual turnover, and businesses with a turnover less than that equivalent to USD $2,000,000 were screened out. To enable ease of responding for participants, the currency bands were rounded in 2024. In order to keep the screening criteria consistent at $2,000,000, the $2,000,000 equivalent figures in each market were kept as specific as possible, using the following logic:

Table 1.11a Rounding of screening criteria – equivalent to $2,000,000 (2024)

Sum	Rounding
Sums of 10,000,000 and under	Up to 1 decimal point
Sums of 11,000,000 to 100,000,000	Rounded to the nearest 1,000,000
Sums over 100,000,000	Rounded to the nearest 10,000,000

The rest of the bands (equivalent to over $2,000,000) were rounded using the following logic:

Table 1.12b Rounding of screening criteria – equivalent to over $2,000,000 (2024)

Sum	Rounding
Sums of 10,000,000 and under	Rounded to nearest 1,000,000
Sums of 10,000,000 to 100,000,000	Rounded to nearest 10,000,000
Sums of 100,000,000 to 1,000,000,000	Rounded to nearest 100,000,000
Sums of 1,000,000,000 to 10,000,000,000	Rounded to nearest 1,000,000,000
Sums of 10,000,000,000 and above	Rounded to nearest 10,000,000,000

Since the screening criteria was kept as specific as possible, it is unlikely that this had any impact on the final 2024 data. Please note that these conversions were based on the conversion rates from Google Finance on 16/10/2024. The exchange rates were as follows:

Table 1.13 Currency conversion rates (as of 16 October 2024)

Currency	China (CNY)	Japan (JPY)	France/ Germany (EUR)	UAE (AED)	India (INR)	Brazil (BRL)	South Africa (ZAR)
Units per USD	7.11	149.22	0.92	3.67	84.03	5.64	17.59

Currency	Turkey (TRY)	Mexico (MXN)	South Korea (KRW)	Canada (CAD)	Australia (AUD)	Nigeria (NGN)	Saudi Arabia (SAR)
Units per USD	34.20	19.92	1,362.78	1.38	1.50	1635.94	3.75

2.3.3 Campaign materials

All respondents were asked to go online to view a selection of campaign materials to aid recall, as part of the interview. Prospective investors and buyers were shown images from the GREAT Trade and Investment campaign, relevant to their classification.

In total, 2,830 respondents (70%) were able to view the material online. In contrast, 1,229 respondents (30%) were read descriptions[4] of the images, due to either the inability or refusal to access the internet during the time of interviewing. Examples of GREAT campaign material evaluated in this study are shown below in Figure 1.1.

[4] The full descriptions of the campaign material can be found in the questionnaire in the appendix.

Figure 1.1 Sample Images shown to respondents with access to the online web page



Figure 1.1 shows examples of GREAT campaign advertisements with taglines including 'Great Minds see beyond the binary', 'Great Investments are creating a sustainable future', and 'Great Inventions push everyone forward'.

2.4 Fieldwork

Interviews were conducted with a senior individual after they had confirmed their involvement in making decisions about investments, and/or buying products or services, on behalf of their organisation at the beginning of the interview.

Computer-assisted telephone interviewing (CATI) conducted by our fieldwork partner[5] was used in all countries. The survey scripting was also carried out by our fieldwork partner and fully managed by Yonder's central research team. Interviewing teams were supplied with secure access to the script for their market.

Interviewers were briefed by supervisors prior to commencing fieldwork. All interviewing was conducted during standard working hours, unless otherwise requested. Where respondents were unable to participate at the point of first contact, follow-up appointments were booked as necessary. The overall fieldwork outcomes are summarised in Table 1.13 below:

[5] Our fieldwork partners are a fieldwork and research agency chosen by Yonder as a partner for computer-assisted telephone interviewing amongst businesses audiences.

Table 1.14 Sample outcomes

Conversion Stage	TOTAL	FR	DE	US	ZA	IN	JP	CN	BR	AE	TR	CA	MX	KR	AU	NG	SA
Completed Interviews	4,035	250	250	253	254	250	250	250	251	260	250	253	250	251	259	252	252
Sample Called	88,034	5,860	5,827	5,833	5,754	5,264	5,862	5,929	5,888	5,879	5,904	5,852	5,893	5,923	5,854	3,069	3,443
Soft Appointments	1,078	55	115	34	28	45	97	102	91	55	123	88	76	45	110	8	6
Hard Appointments	402	24	23	13	24	9	21	44	45	21	45	23	30	25	38	5	12
Maximum call attempts	15,666	987	738	1,092	1,022	1,192	988	1,092	876	1,254	1,364	644	1,209	836	921	666	785
Screen outs (that is, ineligible)	12,492	792	894	549	840	842	687	722	875	994	776	786	675	756	728	746	830
Refusals	26,382	2,119	1,676	2,636	1,486	603	2,183	2,391	1,982	1,024	1,261	1,832	1,872	2,031	1,872	622	792
Unused	2,547	140	173	167	246	736	138	71	112	121	96	148	107	77	146	4	65
Eligibility rate	24%	24%	22%	32%	23%	23%	27%	26%	22%	21%	24%	24%	27%	25%	26%	25%	23%
Co-operation rate	39%	33%	41%	23%	42%	64%	30%	29%	36%	55%	45%	36%	33%	33%	35%	62%	58%

Sample called: number of records that were successfully looked up.

Soft appointments: outstanding soft appointments remained unfulfilled as quota cells had been filled. Soft appointments can usually be described as permissions to call back at another time if respondent is busy/unavailable.

Hard appointments: outstanding hard appointments remained unfulfilled as quota cells had been filled. Hard appointments are confirmed by respondents and booked for a pre-arranged time and date.

Maximum call attempts: non-responses from potential respondents after a maximum of 6 call attempts.

Screen-outs: calls/interviews that do not meet the study criteria (that is to say, businesses who said that they had not previously, or were not likely to buy and/or invest internationally in the future).

Refusals: instances where those called do not wish to take part in the survey.

Unused: sample not used after meeting required target number of completes.

Eligibility rate: incidence rate of business eligible for the study: completes/(completes + screen out).

Co-operation rate: co-operation rate based on estimated eligibility: % = completed interviews / (completed interviews + (refusal*eligibility rate))*100.

2.4.1 Screening and Eligibility

The proportion of business who were eligible to take part in the study in 2024 remained broadly in line with eligibility in 2023. Table 1.14, Table 1.15, and Table 1.16 show screened, screen-out

counts, and eligibility comparisons between 2020, 2021, 2022, 2023 and 2024. For the purpose of comparison, the tables below include all markets, except Mexico, South Korea, Australia, Nigeria, and Saudi Arabia (11 consistent markets).

Table 1.15 Screened

Screened	Wave 3 (2020)	Wave 4 (2021)	Wave 5 (2022)	Wave 6 (2023)	Wave 7 (2024)
Manufacturing	3,134	3,302	2,730	2,670	2,638
Construction	893	1,052	1,300	1,109	1,218
Wholesale, Retail and Motor Repair	2,641	2,963	2,483	2,634	2,597
Professional services	1,748	1,811	1,800	2,028	2,118
Other services	1,528	2,172	2,083	2,579	2,556

Screened counts are the total of all businesses who qualify for the study based on targetable information (10+ employees and at least $2,000,000 revenue) plus those that were later screened out; 2018 screening data not available for comparison. 2018 sector profile information unavailable.

Table 1.16 Screen-outs

Screen-outs	Wave 3 (2020)	Wave 4 (2021)	Wave 5 (2022)	Wave 6 (2023)	Wave 7 (2024)
Manufacturing	1,879	2,140	1,957	1,840	2,134
Construction	757	849	1,003	872	916
Wholesale, Retail and Motor Repair	2,034	2,426	1,842	2,077	2,156
Professional services	1,204	1,336	1,320	1,458	1,470
Other services	1,297	1,770	1,514	2,045	2,081

Screen-outs are all the screened businesses who also said that they had not previously, or were not likely to, buy and/or invest internationally in the future.

Table 1.17 Eligibility rate

Eligibility	Wave 3 (2020)	Wave 3 (2020)	Wave 4 (2021)	Wave 4 (2021)	Wave 5 (2022)	Wave 5 (2022)	Wave 6 (2023)	Wave 6 (2023)	Wave 7 (2024)	Wave 7 (2024)
Total Sample Loaded	66,000	66,000	66,000	66,000	66,000	66,000	66,000	66,000	66,000	66,000
Manufacturing	1,255	1.9%	1,162	1.8%	773	1.2%	830	1.3%	504	0.8%
Construction	136	0.2%	203	0.3%	297	0.5%	237	0.4%	302	0.5%

Eligibility	Wave 3 (2020)	Wave 3 (2020)	Wave 4 (2021)	Wave 4 (2021)	Wave 5 (2022)	Wave 5 (2022)	Wave 6 (2023)	Wave 6 (2023)	Wave 7 (2024)	Wave 7 (2024)
Wholesale, Retail and Motor Repair	607	0.9%	537	0.8%	641	1.0%	557	0.8%	441	0.7%
Professional services	544	0.8%	475	0.7%	480	0.7%	570	0.9%	648	1.0%
Other services	231	0.4%	402	0.6%	569	0.9%	534	0.8%	475	0.7%

Eligibility rate calculated as the proportion of respondents from the total sample loaded who qualify for the survey based on all 3 criteria (must have 10 or more employees, make at least $2,000,000 USD in turnover, and be willing to buy from or invest in the UK).

2.5 Weighted and unweighted sample profiles

The weighting scheme used was replicated from the previous wave for consistency and comparability.

The screened sample was weighted to reflect the population of eligible businesses from the Dun and Bradstreet business database. All screened-out businesses were then removed, and the weights rescaled for completed interviews only. Table 1.17 presents the weighted and unweighted interviews by market.

Due to small base sizes, sector classifications were merged into these categories:

- manufacturing
- construction
- wholesale, retail and motor repair
- professional services (information and communication; finance, insurance and real estate; professional, scientific and technical; admin and support; education, health and social work)
- other (agriculture, forestry, fishing; mining and quarrying; electricity, gas, steam and aircon; water, sewerage and waste; transport and storage; accommodation and food service; arts, recreation and other services)

Table 1.18 Weighted (w) and unweighted (u) sample profiles

			TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
BR	w	N	251	53	35	43	71	20
BR	w	%	6%	5%	10%	6%	7%	9%
BR	u	N	251	58	22	70	50	20
BR	u	%	6%	5%	6%	8%	6%	8%
CA	w	N	253	81	25	43	58	14

			TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
CA	w	%	6%	7%	7%	6%	5%	6%
CA	u	N	253	63	24	57	55	16
CA	u	%	6%	6%	7%	7%	7%	6%
CN	w	N	250	58	13	58	79	11
CN	w	%	6%	5%	4%	8%	7%	5%
CN	u	N	250	83	22	58	53	9
CN	u	%	6%	7%	6%	7%	6%	4%
FR	w	N	250	77	22	56	49	11
FR	w	%	6%	7%	6%	8%	5%	5%
FR	u	N	250	66	26	62	44	13
FR	u	%	6%	6%	8%	7%	5%	5%
DE	w	N	250	66	34	62	56	8
DE	w	%	6%	6%	9%	9%	5%	3%
DE	u	N	250	85	19	42	58	11
DE	u	%	6%	8%	6%	5%	7%	4%
IN	w	N	250	110	13	22	76	14
IN	w	%	6%	10%	3%	3%	7%	6%
IN	u	N	250	83	17	54	59	18
IN	u	%	6%	7%	5%	6%	7%	7%
JP	w	N	250	110	15	42	61	5
JP	w	%	6%	10%	4%	6%	6%	2%
JP	u	N	250	76	23	49	49	11
JP	u	%	6%	7%	7%	6%	6%	4%
ZA	w	N	254	101	5	43	31	31
ZA	w	%	6%	9%	1%	6%	3%	14%
ZA	u	N	254	66	15	42	45	36
ZA	u	%	6%	6%	4%	5%	5%	14%
TK	w	N	250	35	35	19	78	25
TK	w	%	6%	3%	10%	3%	7%	11%
TK	u	N	250	83	20	47	37	19
TK	u	%	6%	7%	6%	5%	5%	7%

			TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
AE	w	N	260	57	34	53	76	14
AE	w	%	6%	5%	9%	8%	7%	6%
AE	u	N	260	50	30	70	53	20
AE	u	%	6%	4%	9%	8%	6%	8%
US	w	N	253	76	27	50	62	8
US	w	%	6%	7%	7%	7%	6%	4%
US	u	N	253	56	21	59	61	12
US	u	%	6%	5%	6%	7%	7%	5%
MX	w	N	250	46	21	36	75	23
MX	w	%	6%	4%	6%	5%	7%	10%
MX	u	N	250	63	18	57	53	19
MX	u	%	6%	6%	5%	7%	6%	7%
KR	w	N	251	67	9	29	74	16
KR	w	%	6%	6%	2%	4%	7%	7%
KR	u	N	251	100	14	36	46	12
KR	u	%	6%	9%	4%	4%	6%	5%
AU	w	N	259	83	31	69	30	11
AU	w	%	6%	7%	8%	10%	3%	5%
AU	u	N	259	64	31	57	46	15
AU	u	%	6%	6%	9%	7%	6%	6%
NG	w	N	252	92	30	27	77	3
NG	w	%	6%	8%	8%	4%	7%	1%
NG	u	N	252	70	16	49	58	7
NG	u	%	6%	6%	5%	6%	7%	3%
SA	w	N	252	32	18	54	111	13
SA	w	%	6%	3%	5%	8%	10%	6%
SA	u	N	252	64	27	57	52	18
SA	u	%	6%	6%	8%	7%	6%	7%

2.6 Effective base sizes and margins of error

Applying weighting to data, whilst making the figures more representative, can also reduce the statistical reliability of the results by reducing the effective base sizes for the purpose of statistical testing.[6] The impact of weighting for each market is shown in Table 1.18, along with the required ranges for different sample sizes and percentages associated with confidence intervals at the 95% confidence level. This means that if the survey were to be conducted 100 times, a finding of the same nature would be found on at least 95 occasions. For example, if 10% or 90% of a sample of 4,035 gives a particular answer, the chances are 95 in 100 that the 'true' value will fall within the range of plus or minus 1.0 percentage points from the sample results.

Table 1.19 Effective base sizes

	TOTAL (unweighted)	Effective base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
TOTAL	4,035	3,563	±0.9	±1.2	±1.4	±1.5	±1.5
USA	253	238	±3.7	±4.9	±5.7	±6.0	±6.2
France	250	246	±3.7	±5.0	±5.7	±6.1	±6.2
Germany	250	223	±3.7	±5.0	±5.7	±6.1	±6.2
China	250	226	±3.7	±5.0	±5.7	±6.1	±6.2
Japan	250	215	±3.7	±5.0	±5.7	±6.1	±6.2
UAE	260	242	±3.7	±4.9	±5.6	±6.0	±6.1
India	250	219	±3.7	±5.0	±5.7	±6.1	±6.2
Brazil	251	226	±3.7	±5.0	±5.7	±6.1	±6.2
South Africa	254	226	±3.7	±4.9	±5.6	±6.0	±6.2
Turkey	250	175	±3.7	±5.0	±5.7	±6.1	±6.2
Canada	253	244	±3.7	±4.9	±5.7	±6.0	±6.2
Mexico	250	227	±3.7	±5.0	±5.7	±6.1	±6.2
South Korea	251	220	±3.7	±5.0	±5.7	±6.1	±6.2
Australia	259	242	±3.7	±4.9	±5.6	±6.0	±6.1
Nigeria	252	208	±3.7	±4.9	±5.7	±6.1	±6.2
Saudi Arabia	252	186	±3.7	±4.9	±5.7	±6.1	±6.2

[6] Statistical testing can only be applied in pure terms to random probability approaches, which is not the case here. We have applied statistical testing for this study for illustrative purposes.

2.7 Data processing and analytics

No data entry was required because the survey was conducted using CATI, and therefore, all routings were built into the script.

Sub-group analysis was carried out on the 2024 data to understand differences in responses. No additional analytical processes were applied.

2.8 Sub-group definitions

This section provides an overview of the subgroups used for analysis in this study. Respondents were classified into each group based on the responses they gave in the survey. Some of the information was taken from the sample profile but respondents were asked to confirm the sample information was correct during the interview. This was the case for size, sector, and market groups.

2.8.1 Business size

Sub-group analysis was based on business turnover and size. Table 1.19 shows how the overall sample breaks down by company turnover and number of employees. This breakdown was reflective of the target sample for this study: businesses who buy/invest internationally or are considering doing so, and those with a minimum annual turnover of $2,000,000 USD and at least 10 employees.

Table 1.20 Breakdown of respondents by size and turnover (unweighted)

Annual Turnover (USD $)	N	%	Number of Employees	N	%
$2,000,000 to $10,000,000	1,407	35%	10 to 49	1,477	37%
$10,000,000 to $50,000,000	1,134	28%	50 to 249	1,068	26%
$50,000,000 to $100,000,000	677	17%	250 to 499	530	13%
$100,000,000 to $500,000,000	438	11%	500 to 999	377	9%
$500,000,000 to $1,000,000,000	196	5%	1,000 to 1,999	223	6%
$1,000,000,000 and over	183	5%	2,000 to 4,999	181	4%

Annual Turnover (USD $)	N	%	Number of Employees	N	%
TOTAL	4,035	100%	5,000 and over	179	4%
			TOTAL	4,035	100%

2.8.2 Sector

Table 1.20 shows the sector breakdown of businesses within the study. A sample of businesses in each market was obtained from Dun and Bradstreet, and as interviews progressed the quotas were adapted according to the findings from the screening and eligibility checks. The profile by sector was adapted to be reflective of the target population.

Table 1.21 Breakdown of respondents by sector (unweighted)

Sector	N	%
A - Agriculture, Forestry, Fishing	57	1%
B - Mining, Quarrying	50	1%
C - Manufacturing	1,130	28%
D - Electricity, Gas, Steam and Aircon	73	2%
E - Water, Sewerage, Waste	10	0%
F - Construction	345	9%
G - Wholesale, Retail, Motor Repair	866	21%
H - Transport/ Storage	189	5%
I - Accommodation/ Food Service	97	2%
J - Information and Communication	197	5%
K - Finance and Insurance	280	7%
L - Real Estate	71	2%
M - Professional, Scientific, Technical	243	6%
N - Admin and Support	28	1%
P - Education	39	1%
Q - Health and Social Work	81	2%

Sector	N	%
R - Arts/ Entertainment/ Recreation	23	1%
S - Other Services	256	6%
TOTAL	4,035	100%

2.8.3 Market

When interpreting overall findings, it is important to consider that there are 2 sets of total findings presented that are aggregated results from across markets: 16-market totals and 11-market totals. The trended 11-market totals represent the aggregated data of markets that were consistently present in the 2020, 2021, 2022, 2023 and 2024 surveys, respectively. All markets are included in the aggregated scores except Mexico, South Korea, Australia, Nigeria, and Saudi Arabia. In contrast, the 16-market aggregated results include all markets surveyed in 2024 only. Almost equal numbers of interviews have been conducted in each market and each is given equal weight within the overall total (this means all markets have been treated equally in the weighting scheme regardless of their number of eligible businesses). The 'total' therefore reflects views across these 11 or 16 markets.

In most research studies, there will be an element of cultural bias[7] which affects how people in different countries respond to survey questionnaires. However, in this study, we believe that variations within samples in each market and broader socio-political factors will have a greater effect on how respondents answer questions about doing business with other countries and the subsequent variations by market.

2.8.4 Buy and Invest

In order to be eligible to participate in the survey, businesses needed to either already be buying or investing internationally or be considering doing so in the future. For the purposes of the survey, every respondent was assigned to either a 'buyer' or 'investor' sub-group depending on their current/potential international business activities. This approach was taken to keep the questionnaire length manageable – in particular sections of the survey, each respondent was only asked about either buying or investment factors and not both, which would have made the questionnaire too long.

While every respondent in the survey was assigned to either a 'buyer or 'investor' group, it is important to bear in mind that there was significant overlap between the 2 groups. As Figure 1.2 shows, a majority of respondents were both. There were significantly more businesses that were currently only buying/would only consider buying (17%) compared to those that were currently only investing/would only consider investing (9%).

[7] International research Golden rules, making sense of international data

Within the overall sample for the 11 consistent markets in 2024, 1,385 respondents were classified as ‘buyers’ and asked questions relating to buying, whilst 1,386 were classified as ‘investors’ and were asked questions relating to investment. For the overall 16 markets in 2024, the sample size for ‘buyers’ increased to 2,016 respondents, and for ‘investors’, this increased to 2,019.

Figure 1.2 Breakdown of respondents by international trading and investment activities – 11-market total (unweighted)

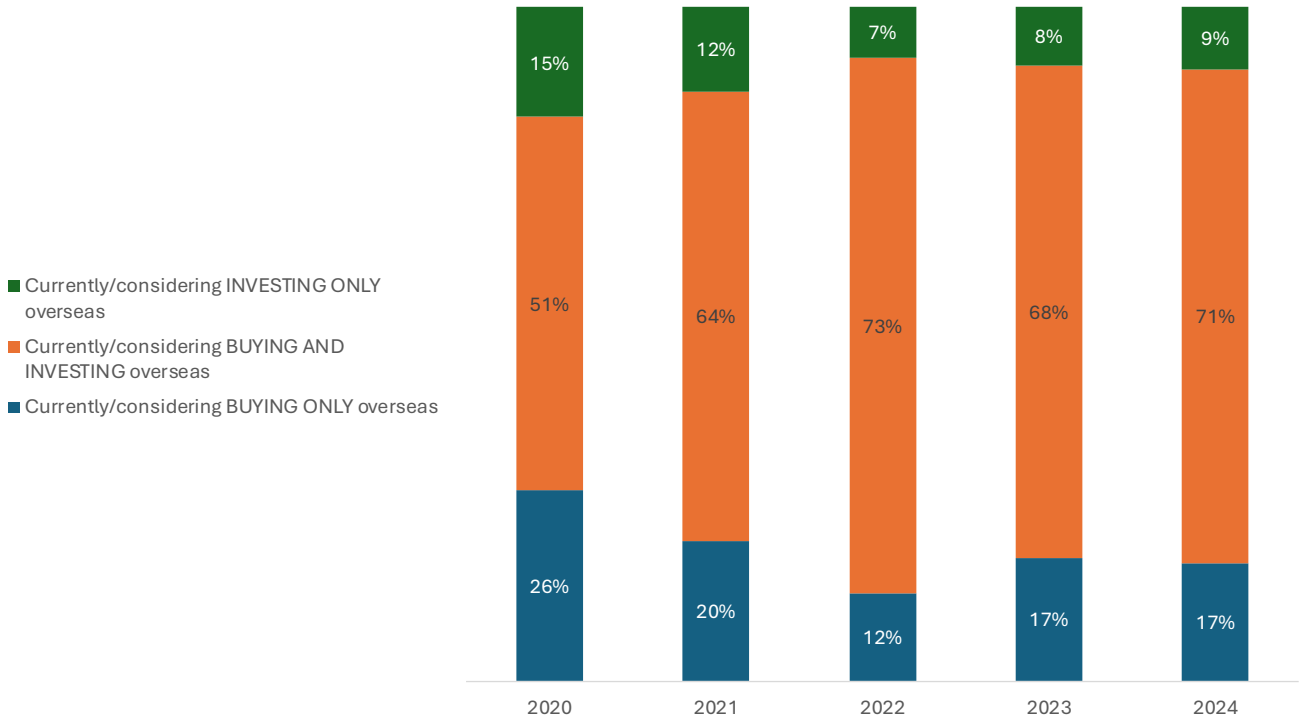

Figure 1.2 shows the proportion of businesses that are ONLY currently or considering buying overseas, businesses that are ONLY currently or considering investing overseas, and businesses that are currently or considering buying AND investing overseas. Figures from 2020 to 2024 are shown.

2.8.5 GREAT Recognition

As well as questions relating to UK business promotional activity more broadly, respondents were asked specifically about GREAT campaign material. Those who were willing and could access the internet at the point of interviewing were prompted with a selection of images taken from GREAT campaign (shown to buyers/investors accordingly) in local languages, as well as the over-arching campaign logo. A majority of respondents accessed the internet to view campaign stimuli in 2024, 2023, 2022, 2021 and 2020 (72%, 66%, 64%, 66% and 69% respectively), amongst the 11

consistent markets. Those without internet access were given a detailed description[8] of the promotional activity.

Whilst the images used and description given were tailored to the campaign, it is possible that respondents may also be referring to other GREAT campaigns using similar imagery or messaging (for example, Visit Britain and the British Council campaigns).

In the analysis, 'GREAT recogniser' included respondents who recalled or recognised any of the GREAT campaign materials.

2.9 Quality

This work was carried out in line with Market Research Society standards. For more information, please refer to the MRS Code of Conduct which can be found at: https://www.mrs.org.uk/standards/code-of-conduct

2.10 Reporting methodology

Unless specified otherwise, all commentary in the report focused on differences between sub-groups that are statistically significant at a 95% confidence level. This means that if the survey were to be conducted 100 times, a finding of the same nature (for example sub-group A is more likely to respond in a certain way than sub-group B) would be found on at least 95 occasions. Strictly speaking, statistical testing can only be applied in pure terms to random probability approaches, which is not the case here. We have applied statistical testing for this study for illustrative purposes.

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of 'don't know/not applicable' categories, or multiple answers.

[8] Can you recall having seen, read or heard any advertising, events or promotion which states 'To see things differently, choose the UK', or which includes phrases using the word GREAT to promote 'Great Britain' as a place to do business with?

3 Background Quality Report

3.1 Data quality of data sources

Telephone fieldwork for this study was conducted and managed by our fieldwork partner. All fieldwork was conducted by our fieldwork partner from their call-centres in the UK, Singapore and Noida, India. A project manager, who is a native speaker of the target market language managed each market's fieldwork. This team leader also conducted quality control monitoring and coordinated additional monitoring resource in that language. Our fieldwork partner dedicated Quality Control Manager also conducted random checks to guard against any quality control 'blind-spots' that can occur when a large field team is deployed.

Project managers monitored performance metrics on a daily basis, with specific focus on sample performance and sufficiency, reviewed in conjunction with our fieldwork partner's Head of Call Centre Operations. A detailed progress report to an agreed DBT template was shared with Yonder on a weekly basis. This report was run weekly in the event of any sample issues, with tele-conference calls to discuss with Yonder as required.

3.2 Quality control

This section provides an overview of the steps the research team and the local partners undertook before, during and after fieldwork to maximise data quality. Pre-fieldwork quality control steps undertaken in 2024 are outlined below.

Whilst conscious of the need to track data consistent with previous waves' datasets, the questionnaire underwent a collaborative and iterative assessment process between our fieldwork partner and the Yonder project lead, in collaboration with DBT. This ensured that any potential filtering or routing ambiguities were resolved, unprompted code-lists organised to assist interviewer navigation, interviewer instructions added, and wordings of new questions optimised. The finalised version of the questionnaire was signed off by DBT, prior to CATI scripting. The questionnaire was scripted using Confirmit software and tested by the CATI programmer and by our fieldwork partner's quality assurances department.

Once our fieldwork partner had signed off the CATI script internally, a testable version of the script was made available to the Yonder team for further testing and final sign-off. Any amendments required were detailed to our fieldwork partner via email; amendments were implemented, and the same link was then used by Yonder to retest until final sign-off.

Finally, a dummy dataset was created as a final check of routings, to confirm expected base sizes per question.

During the fieldwork, interviewers' performance quality was monitored randomly throughout fieldwork, in addition to regular coaching and refresher training.

Approximately 10% of interviews were monitored via respondent-permissioned recordings (with some live shadowing of calls). Interviewer performance was assessed regularly, with individual interviewers being monitored in proportion to their contribution to the fieldwork; all findings discussed directly with interviewers with improvement potential clearly signposted where necessary. Additional monitoring of approach calls was conducted to ensure engaging and effective recruitment techniques were being deployed (a key element in maximisation of sample yield).

Verbatim responses collected (specified ‘others’) were continually checked and cleansed throughout the fieldwork period by the relevant project managers.

Subsequent to initial field checks, specified ‘other’ responses were reviewed by a dedicated coding specialist: open responses that could have been coded using the question’s pre-existing response frame were back coded where appropriate.

After fieldwork was concluded, steps were taken to maximise data quality.

Data was quality and validity checked at 25%, 50% and 100% of overall quota target – these included checks for flat-lining and/or excessive incidence of ‘don’t know’ / ‘refused’ responses within any given interview.

Interim data in SPSS format was also provided to Yonder at two agreed milestones during fieldwork, to enable data checking and the feedback of amendments, additions, deletions or re-ordering to be made before end of fieldwork, enabling final data to be sent as soon as possible after fieldwork completion. Verbatims (specified ‘others’) were supplied as a separate Excel document since lengthy verbatim comments can become truncated in SPSS exports.

Final quality checks and base checks were undertaken on completion of fieldwork, and the final data file (plus verbatim file) was produced and delivered within 24 hours of fieldwork end.

4 Appendix

4.1 Questionnaire

QUESTIONNAIRE STRUCTURE

SECTION X: Gatekeeper Introduction

- Introduction
- Safety check
- Gatekeeper referral
- Introduction to survey
- Seniority check
- Privacy

SECTION S: Screeners and Classifications

- Organisation type
- Buying activity abroad and in the UK
- Investment activity abroad in the UK
- Business size
- Business turnover
- Ineligible for survey
- Likelihood to buy abroad
- Likelihood to invest abroad
- Business sector

SECTION A: Unprompted Campaign Awareness

- Unprompted campaign recall in L12M

SECTION B: Buying and Investment in UK and Competitors

- Awareness of buying/investment opportunities
- Likelihood to buy/invest in N3Y
- Planned spend among UK buyers
- Reasons why likely/unlikely to buy from UK
- Likelihood of buying/investing in UK vs 12M ago
- Reasons why more/less likely to buy/invest in UK vs. 12M ago
- Sources for help/advice on buying/investing abroad

SECTION C: Association with key attributes

- Favourability towards the UK

- **Influence of UK govt. on buying/investing**
- **Factors of importance when buying/investing abroad**
- **Association of factors with UK, Germany, France, the Netherlands among other markets**
- **Association of factors with UK and USA within Germany and France**

SECTION D: Prompted Campaign Awareness

- **Recall of promotional activity in selected markets**
- **Where UK promotional activity was seen**
- **Content of UK promotional activity**
- **Prompted recall of GREAT promotional activity**
- **Where GREAT promotional activity was seen**
- **Impact of GREAT promotional activity on feeling towards buying/investing in UK**
- **GREAT campaign diagnostics**
- **Action taken as a result of GREAT**
- **Whether current buying/investing is as a result of GREAT campaign**

SECTION E: Awareness of DBT, Brexit and key contact information

- **Sources of information about investment abroad**
- **Sources of information about specific industry (and most used)**
- **Segmentation statements**

SECTION F: Free Trade Agreements

- **Awareness of TCA in France and Germany**
- **Awareness of FTAs in Japan, South Africa, Mexico, South Korea, Canada, Turkey and Australia**
- **Impact of FTA on likelihood to buy/invest in UK**
- **Reasons why more/less likely to buy/invest in UK as a result of FTA**
- **Whether an FTA would impact on likelihood to buy/invest in UK among USA, Brazil, India, China, UAE, Nigeria and Saudi Arabia**
- **Reasons why would be more/less likely to buy invest in UK as result of an FTA**

SECTION H: Investment Transformation Programme

- **Extent to which UK Govt investment proposition would be considered**
- **Factors of importance when making decisions about whether to expand/invest in the UK**
- **Whether ongoing support from national Govt would influence decision to expand/reinvest in a country**

SECTION X: GATEKEEPER INTRODUCTION

ASK ALL

I1 Greeting and information

Good morning/afternoon. I am calling from [fieldwork partner name] in partnership with Yonder, an independent market research agency based in the UK. We are conducting a research study on behalf of the UK Government's Department for Business and Trade (DBT). The aim of the study is to research views of companies in your country about the United Kingdom.

INT: ADD IF NECESSARY

- Confidentiality of responses/used for research purposes only
- Participation in this survey is voluntary

ASK ALL

I1A Safety check

For safety reasons, is it safe for you to continue now and you are not driving a car, using any equipment or machinery or doing anything else that requires your focused attention?

PROG: SINGLE CODE ONLY

1. **Yes – doing something potentially unsafe [TAKE DOWN DETAILS FOR CALLBACK]**
2. **No – safe to continue with survey [CONTINUE TO I2]**

ASK IF SAFE TO CONTINUE (I1A = 2)

I2 Senior decision maker check

May I speak to the most senior person in your organisation who is responsible for making decisions about your business investments or buying products or services from companies in other countries?

INT, ADD IF NECESSARY: we want to interview the business even if they don't currently invest abroad or buy products/services from companies abroad.

PROG: SINGLE CODE ONLY

1. **Named person speaking [CONTINUE TO I3]**
2. **Transferred [CONTINUE TO I3]**
3. **Not currently available [INT: COLLECT NAME AND MAKE APPT]**

4. **Nobody with responsibility at this site [INT: ASK FOR TRANSFER AND MAKE NEW CALL]**
5. **Refused [THANK AND CLOSE]**
6. **No one is responsible for these activities [THANK AND CLOSE]**

PROG: ASK ALL STILL ELIGIBLE (I2 = 1-2)

I3 Introduction to relevant respondent

My name is <NAME> and I am calling from a research company called Yonder, an independent research company based in the UK. We have been asked to conduct a survey on behalf of the UK Government's Department for Business and Trade (DBT) about businesses' perceptions of international trade and foreign investment. It will take about 25 minutes.

PROG: NEW SCREEN

I4 Senior decision maker check

Can I first check - are you the most senior person responsible for making decisions on whether to grow your business in other countries or to buy products and services from companies abroad?

PROG: SINGLE CODE ONLY

1. **Yes / Maybe [GO TO I5]**
2. **No [INT: COLLECT NAME AND NUMBER AND ASK FOR TRANSFER. GO TO NEW CALL]**
3. **Refused [THANK AND CLOSE]**

NEW SCREEN:

I5. Privacy

I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. The UK Government will not be able to identify any particular organisation when analysing the results.

IF ASK FOR FURTHER INFORMATION: I can email you further information and arrange a time to call you back.

IF THEY DO NOT HAVE AN EMAIL ADDRESS: You can find more information about the survey, including how we process and store personal data, on Yonder's website at [https://yonderconsulting.com/survey-privacy-notice/], and I can arrange a time to call you back.

1.

PROG: TIMESTAMP 1

2. SECTION S: SCREENERS AND CLASSIFICATIONS

3. ASK ALL

4. S0 Organisation type

5. Is your organisation…?
6. *READ OUT, SINGLE CODE*
    1. A profit-making organisation
    2. A non-profit making organisation or charity [THANK AND CLOSE]

7. ASK ALL

8. S1a Whether buys/invests currently

Does your organisation currently buy or import products or services from companies based abroad?

SINGLE CODE

1. Yes, currently buys/imports
2. No

9.

ASK ALL WHO SAY 'NO' AT S1a

S1b. Considering buying/importing

Are you considering buying or importing products or services from companies based abroad in the future?

SINGLE CODE

1. Yes
2. No
3. Don't know [DO NOT READ OUT]

PROG: ASK ALL WHO SAY 'YES' AT S1a: IF 'NO' AT S1a AUTOFILL CODE 2 ('NO') AT S1c AND SKIP TO S1d

S1c. Whether currently buying/importing in UK

Does your organisation currently buy or import products or services from companies based in the United Kingdom (that is England, Scotland, Wales and Northern Ireland)?

SINGLE CODE

1. Yes, currently buys/imports from UK

2. No

PROG: ASK ALL – IF 'YES' AT S1c AUTOFILL CODE 1 ('YES')

S1d. Whether has bought/imported from UK in past 5 years

Have you bought or imported products or services from companies based in the United Kingdom within the last five years?

SINGLE CODE

1. Yes
2. No
3. Don't know [DO NOT READ OUT]

10.
11.
12.
13. BUY DUMMY VARIABLE

14. S1a = (1) or S1b = (1) or S1c = 1 or S1d = 1 **15. BUY**
16. S1a = (2) and S1b = (2 or 3) and S1c = 2 and S1d = (2 or 3) **17. NO BUY**

18.

PROG: ASK ALL

S2a. Whether currently investing abroad

Does your organisation currently invest in other countries? By 'invest' we mean expanding ongoing operations or making a capital investment in another country either directly through your own organisation, or working in partnership with another.

INT, ADD IF NECESSARY: This can also include expanding an existing business or starting up a new business in another country.

SINGLE CODE

1. Yes, currently invests abroad
2. No

PROG: ASK ALL WHO SAY NO AT S2a

S2b. Considering investing

Are you considering investing in other countries in the future?

SINGLE CODE

1. Yes
2. No
3. Don't know [DO NOT READ OUT]

PROG: ASK ALL WHO SAY 'YES' AT S2a: IF 'NO' AT S2a AUTOFILL CODE 2 ('NO') AT S2c AND SKIP TO S2d

S2c. Whether currently invests in UK

Does your organisation currently invest in the United Kingdom?

SINGLE CODE

1. Yes, currently invests in the UK
2. No

PROG: ASK ALL - IF 'YES' AT S2c AUTOFILL CODE 1 ('YES')

S2d. Whether has invested in UK in past 5 years

Have you invested in the UK within the last five years?

SINGLE CODE

ADD IF NECESSARY: Since [current month] 2019).

1. Yes
2. No
3. Don't know [DO NOT READ OUT]

19. INVEST DUMMY VARIABLE

20. S2a = (1) or S2b = (1) or S2c = 1 or S2d = 1 **21. INVEST**
22. S2a = (2) and S2b = (2 or 3) and S2c = 2 and S2d = (2 or 3) **23. NO INVEST**
24.

ASK ALL EXCEPT "NO BUY" AND "NO INVEST"

S3Open. Employee number

Approximately how many people are employed across the whole organisation, including in other countries? (Please include the business owner and any employees that are currently furloughed).

INT: PROBE FOR BEST ESTIMATE.

1. OPEN-NUMERIC WITH TICK BOX [ ] FOR (DO NOT OFFER)
2. Don't know

ASK IF S3Open = "DON'T KNOW" (ELSE, AUTO-FILL S3Coded BASED ON RESPONSE AT S3Open)

S3Coded: **Employee number estimate**

Is it around [INSERT NUMBER FROM SAMPLE] employees?

SINGLE CODE IF PROVIDING ESTIMATE

1. 1-9 [DO NOT READ OUT. IF SELECTED, THANK AND CLOSE]
2. 10-49
3. 50-249
4. 250-499
5. 500-999
6. 1,000-1,999
7. 2,000-4,999
8. 5,000 or more

9. Don’t know / refused [DO NOT READ OUT. IF SELECTED, THANK AND CLOSE]

ASK ALL EXCEPT “NO BUY” AND “NO INVEST”

S4. Approximate revenue/turnover

What was the organisation’s approximate annual revenue/turnover in [local currency] in the last financial year? Is it around [INSERT SAMPLE]?

CURRENCY BANDS TO BE UPDATED TO REFLECT EXCHANGE RATES AT TIME OF FIELDWORK

Code at S4	1	2	3	4	5	6	7	8
USA (US$)	Under USD $ 2 mil [THANK AND CLOSE]	USD $2 mil - USD $10 mil	USD $10 mil - USD $50 mil	USD $50 mil - USD $100 mil	USD $100 mil - USD $500 mil	USD $500 mil - USD $1 bil	Over USD $1 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
China (Chinese Yuan)	Under ¥14 mil [THANK AND CLOSE]	¥14 mil - ¥70 mil	¥70 mil - ¥400 mil	¥400mil - ¥700 mil	¥700 mil - ¥4 bil	¥4 bil - ¥7 bil	Over ¥7 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Japan (Japanese Yen)	Under ￥290 mil [THANK AND CLOSE]	￥290 mil - ￥1 bil	￥1 bil - ￥7 bil	￥7 bil - ￥14 bil	￥14 bil - ￥72 bil	￥72 bil - ￥145 bil	Over ￥145 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
French/ Germany (Euro)	Under EUR 2 mil [THANK AND CLOSE]	EUR 2 mil - EUR 10 mil	EUR 10 mil - EUR 51 mil	EUR 51 mil - EUR 102 mil	EUR 102 mil - EUR 510 mil	EUR 510 mil - EUR 1 bil	Over EUR 1 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
UAE (Emirati Dirham)	Under AED 7.3 mil [THANK AND CLOSE]	AED 7.3 mil - AED 40 mil	AED 40 mil - AED 200 mil	AED 200 mil - AED 400 mil	AED 400 mil - AED 2 bil	AED 2 bil - AED 4 bil	Over AED 4 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused

India (Indian Rupee, in Crore)	Under INR 16.4 crores [THANK AND CLOSE]	INR 16.4 cr - INR 82 cr	INR 82 cr – INR 400 cr	INR 400 cr - INR 800 cr	INR 800 cr - INR 4,000 cr	INR 4,000 cr- INR 8,000 cr	Over INR 8,000 cr	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Brazil (BRL)	Under BRL 10.4 mil [THANK AND CLOSE]	BRL 10.4 mil - BRL 50 mil	BRL 50 mil - BRL 300 mil	BRL 300 mil - BRL 500 mil	BRL 500 mil - BRL 3 bil	BRL 3 bil - BRL 5 bil	Over BRL 5 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
South Africa (ZAR)	Under ZAR 36 mil [THANK AND CLOSE]	ZAR 36 mil - ZAR 200 mil	ZAR 200 mil - ZAR 900 mil	ZAR 900 mil - ZAR 2 bil	ZAR 2 bil - ZAR 9 bil	ZAR 9 bil - ZAR 20 bil	Over ZAR 20 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Turkey (TRY)	Under TRY 37 mil [THANK AND CLOSE]	TRY 37 mil - TRY 200 mil	TRY 200 mil - TRY 900 mil	TRY 900 mil - TRY 2 bil	TRY 2 bil - TRY 9 bil	TRY 9 bil - TRY 20 bil	Over TRY 20 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Mexico (MXN)	Under MXN 40 mil [THANK AND CLOSE]	MXN 40 mil – MXN 200 mil	MXN 200 mil – MXN 1 bil	MXN 1 bil – MXN 2 bil	MXN 2 bil – MXN 10 bil	MXN 10 bil – MXN 20 bil	Over MXN 20 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused

South Korea (South Korean Won)	Under ₩2.8 bil [THANK AND CLOSE]	₩2.8 bil - ₩10 bil	₩10 bil - ₩70 bil	₩70 bil - ₩100 bil	₩100 bil - ₩700 bil	₩700 bil - ₩1 tril	Over ₩1 tril	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Canada	Under CAD 2.7 mil [THANK AND CLOSE]	CAD 2.7 mil – CAD 10 mil	CAD 10 mil – CAD 70 mil	CAD 70 mil – CAD 100 mil	CAD 100 mil – CAD 700 mil	CAD 700 mil – CAD 1 bil	Over CAD 1 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Australia (AUD)	Under AUD 3.1 mil [THANK AND CLOSE]	AUD 3.1 mil – 10 mil	AUD 10 mil – AUD 80 mil	AUD 80 mil – AUD 100 mil	AUD 100 mil – AUD 800 mil	AUD 800 mil – AUD 1 bil	Over AUD 1 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Nigeria (NGN)	Under NGN 870 mil [THANK AND CLOSE]	NGN 870 mil – NGN 4 bil	NGN 4 bil – NGN 20 bil	NGN 20 bil – NGN 40 bil	NGN 40 bil – NGN 220 bil	NGN 220 bil – NGN 430 bil	Over NGN 430 bil	(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused
Saudi Arabia (KSA)	[THANK AND CLOSE]							(DNRO / IF SELECTED, THANK AND CLOSE) Don't know / refused

ASK IF TURNOVER + $2M USD (S4 <> 1 AND S4 <> 8) AND "NO BUY" AND "NO INVEST"

S5. Reasons why not buying or investing abroad

In that case, the survey is not relevant to you. However, may I briefly ask the reasons why your organisation does not buy products or services from companies based abroad or make foreign investments?

DO NOT READ OUT. MULTICODE

GENERAL REJECTION:

1 No interest in doing so/is not what we do

REASONS NOT TO IMPORT:

2 Do not think there will be a demand for any international products or services in their home country

25 Do not think there will be a demand for any international products or services in their home country

3 Buying from abroad does not make financial sense/can get things cheaper in own country

6 Do not have a trusted/ reliable distributor to facilitate foreign trade

8 Differences in quality standards/quality better in own country

9 Logistical problems/lack of infrastructure in target foreign markets

10 Prohibitive tariffs

14 Set up/operating costs too high

17 Lack of customers abroad/not enough demand for what we provide

REASONS NOT TO INVEST:

11 Previous negative experience of foreign trade and investment

CULTURAL/POLITICAL/GEOGRAPHICAL FACTORS:

5 Lack of language skills

4 Foreign regulatory regimes are too different/risky

7 Political risk

16 Cultural differences

15 Location of market (timezones/logistics)

21 Concerns around the war in Ukraine

LACK OF KNOWLEDGE/RELATIONS:

12 Not enough knowledge of buying and investing/do not know where to obtain information

13 Lack of personal relationships/contacts overseas

OTHER:

20 Disruption due to Covid-19

22 Burden of administration

23 Current inflation in other markets is prohibitive

18 Other

19 Don't know [EXCLUSIVE]

INT/PROG: THANK AND CLOSE IF TURNOVER + $2M USD (S4 <> 1 AND S4 <> 8) AND "NO BUY" AND "NO INVEST"

ASK IF S1B = 1

S7. Likelihood of buying/importing from abroad in future

How likely or unlikely is it that your organisation will buy or import products or services from companies based abroad in the future? Would you say you are…

READ OUT. SINGLECODE

1. Certain to
2. Very likely
3. Fairly likely
4. Fairly unlikely
5. Very unlikely
6. Certain not to
7. Don't know [DO NOT READ OUT]

25.

ASK IF S2B = 1

S8. Likelihood of investing abroad in future

How likely or unlikely is it that your organisation will buy or import products or services from companies based abroad in the future? Would you say you are…

READ OUT. SINGLECODE

1. Certain to
2. Very likely
3. Fairly likely
4. Fairly unlikely
5. Very unlikely
6. Certain not to
7. Don't know [DO NOT READ OUT]

ASK ALL

S9a. Sector check

We have [SAMPLE SECTOR] as your main industry sector. Can I just check that this is correct?

DO NOT READ OUT, SINGLECODE

1. Yes – correct
2. No – not correct
3. Don't know

ASK IF DOES NOT CONFIRM SECTOR (S9a = 2-3)

S9b. Sector choice

PROMPT TO CODE, SINGLECODE

1. A - Agriculture+Forestry+Fishing
2. B- Mining+Quarrying
3. C - Manufacturing
4. D- Electricity+Gas+Steam&Aircon
5. E- Water+Sewerage+Waste
6. F -Construction

7. G - Wholesale+Retail+Motor Repair
8. H - Transport+Storage
9. I - Accomodation+Food Service
10. J - Information+Communication
11. K - Finance+Insurance
12. L - Real Estate
13. M - Profession+Scientific+Technical
14. N - Admin+Support
15. P - Education
16. Q - Health+Social Work
17. R - Arts+Entertainment+Recreation
18. S - Other Services

QUESTIONNAIRE ROUTING DUMMY VARIABLE

S2a = (1) or S2b = (1) or S2c = 1 or S2d = 1	**INVEST**
S1a = (1) or S1b = (1) or S1c = 1 or S1d = 1	**BUY**
INVEST = 1 and BUY = 1	**USE 'LEAST FULL' QUOTA AND ALLOCATE TO BUY OR INVEST ROUTE WITHIN EACH COUNTRY** **MAX QUOTA OF 150 BUY AND 150 INVEST WITHIN EACH COUNTRY**

END OF SCREENER

MAIN QUESTIONNAIRE

SECTION A: UNPROMPTED CAMPAIGN AWARENESS

ASK ALL

UR1. Unprompted campaign awareness/recall

Please think about anything you may have seen, read or heard in the last 12 months which was promoting foreign business opportunities in another country such as foreign investments or opportunities to buy products and services from organisations in that country.

This may include advertising you have seen online, on posters, or newspapers/magazines, articles in newspapers/magazines, received via email or events you plan to/have attended.

For which countries, if any, can you recall seeing such promotion in the last 12 months? Please exclude your own country.

DO NOT READ OUT, MULTICODE

PROG: DO NOT SHOW COUNTRY OF RESPONDENT

1. Australia
2. Brazil
3. Canada
4. China
5. Great Britain/United Kingdom/UK
6. France
7. Germany
8. Hong Kong
9. India
10. Italy
11. Japan
12. Mexico
13. Spain
14. Singapore
15. South Korea
16. USA
17. United Arab Emirates/Dubai
18. _

19. _
20. _
21. _
22. Ireland
23. Morocco
24. Netherlands
25. Poland
26. Portugal
27. Taiwan
28. Thailand
29. Egypt
30. New Zealand
31. Saudi Arabia
97. Other (specify)
98. None [EXCLUSIVE]
99. Don’t know [EXCLUSIVE]

PROG: TIMESTAMP 2

SECTION B: BUYING AND INVESTMENT IN UK AND COMPETITORS

ASK IF BUY

B1. Awareness of buying opportunities abroad

How much, if anything, do you know about opportunities to buy products and services from organisations based in [READ OUT ITERATION]? Would you say….

SINGLE CODE, READ OUT SCALE, PROG: REVERSE SCALE AND RANDOMISE COUNTRY LIST

	A great deal	A fair amount	Not very much	Nothing at all	Don't know [DO NOT READ OUT]
United Kingdom	1	2	3	4	5
Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS)	1	2	3	4	5
China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS)	1	2	3	4	5
The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS)	1	2	3	4	5
Japan (PROG: DO NOT DISPLAY FOR JAPAN RESPONDENTS)	1	2	3	4	5
Republic of Ireland	1	2	3	4	5
France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS)	1	2	3	4	5
India (PROG: DO NOT DISPLAY FOR INDIA RESPONDENTS)	1	2	3	4	5

ASK IF BUY

B1a. Awareness of investment opportunities abroad

How much, if anything, do you know about opportunities to expand operations or invest in [READ OUT ITERATION]? Would you say….

SINGLE CODE, READ OUT SCALE, PROG: REVERSE SCALE AND RANDOMISE COUNTRY LIST

	A great deal	A fair amount	Not very much	Nothing at all	Don't know [DO NOT READ OUT]
United Kingdom	1	2	3	4	5
Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS)	1	2	3	4	5
The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS)	1	2	3	4	5
Japan (PROG: DO NOT DISPLAY FOR JAPAN RESPONDENTS)	1	2	3	4	5
Republic of Ireland	1	2	3	4	5
France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS)	1	2	3	4	5
Singapore	1	2	3	4	5
The Netherlands	1	2	3	4	5

ASK IF BUY

B3. Likelihood of buying/importing from abroad in next three years

How likely is your organisation to buy or import products and services from companies based in the following countries in the next three years? (CLARIFY IF NECESSARY: Until [current month] 2027).

Please give a score between 1 and 10 where 1 would mean you are not at all likely and 10 that you are certain to.

RANDOMISE COUNTRY LIST. SINGLECODE.

	Not at all likely									Certain to	DO NOT READ OUT: Don't know
United Kingdom	1	2	3	4	5	6	7	8	9	10	11

Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
Japan (PROG: DO NOT DISPLAY FOR JAPAN RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
Republic of Ireland	1	2	3	4	5	6	7	8	9	10	11
France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
India (PROG: DO NOT DISPLAY FOR INDIA RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11

26.

ASK IF CURRENTLY BUYING OR PLANNING TO BUY FROM UK (S1C = 1 OR (S1C = 2 AND B3_A = 7-10))

B3a. Planned spend in next 12M

How much, if anything, are you planning on spending in purchases of goods or services from UK companies in the next 12 months?

SINGLECODE. CURRENCY BANDS TO BE UPDATED IN LINE WITH EXCHANGE RATES AT TIME OF FIELDWORK

Code at S4	USA (US $)	China (Chinese Yuan)	Japan (Japanese Yen)	French/ German y (Euro)	UAE (Emirati Dirham)	India (Indian Rupee, in Crore)	Brazil (BRL)	South Africa (ZAR)	Turkey (TRY)	Mexico (MXN)	South Korea (South Korean Won)	Canada (CAD)	Australia (AUD)	Nigeria (NGN)
1	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing	Nothing
2	Up to USD $0.5mil	Up to ¥3.5 mil	Up to ￥72 mil	Up to EUR 0.5mil	Up to AED 1.8 mil	Up to INR 4.1 crores	Up to BRL 2.6 mil	Up to ZAR 9 mil	Under TRY 9.2 mil	Up to MXN 10 mil	Up to ₩705 mil	Up to CAD 0.7 mil	Up to AUD 0.7 mil	Up to NGN 217 mil
3	USD $0.5 mil - USD $5.5 mil	¥3.5 mil - ¥40 mil	￥72 mil - ￥800 mil	EUR 0.5 mil - EUR 5.6 mil	AED 1.8 mil - AED 20 mil	INR 4.1 cr - INR 45 cr	BRL 2.6 mil - BRL 29 mil	ZAR 9 mil - ZAR 99 mil	TRY 9.2 mil - TRY 102 mil	MXN 10 mil – MXN 110 mil	₩705 mil - ₩7.8 bil	CAD 0.7 mil – CAD 7.5 mil	AUD 0.7 mil – 8.6 mil	NGN 217 mil – NGN 2.4 bil
4	USD $5.	¥40 mil -	￥800 mil -	EUR 5.6 mil -	AED 20	INR 45 cr –	BRL 29	ZAR 99	TRY 102	MXN 110	₩7.8 bil -	CAD 7,5	AUD 8.6 mil –	NGN 2.4

	5 mil - USD $10.5 mil	¥74 mil	￥1.5 bil	EUR 11 mil	mil - AED 38 mil	INR 86 cr	mil - BRL 55 mil	mil - ZAR 189 mil	mil - TRY 195 mil	mil – MXN 211 mil	₩15 bil	mil – CAD 14.4 mil	AUD 16.3 mil	bil – NGN 4.5 bil
5	USD $10.5 mil - USD $15.5 mil	¥74 mil - ¥110 mil	￥1.5 bil - ￥2.2 bil	EUR 11 mil - EUR 16 mil	AED 38 mil - AED 57 mil	INR 86 cr - INR 127 cr	BRL 55 mil - BRL 81 mil	ZAR 189 mil - ZAR 279 mil	TRY 195 mil - TRY 288 mil	MXN 211 mil – MXN 311 mil	₩15bil - ₩22bil	CAD 14.4 mil – CAD 21.2 mil	AUD 16.3 mil – AUD 24.1 mil	NGN 4.5 bil – NGN 6.7 bil
6	USD $15.5 mil - USD $20 mil	¥110 mil - ¥142 mil	￥2.2 bil - ￥2.9 bil	EUR 16 mil - EUR 20 mil	AED 57 mil - AED 73 mil	INR 127 cr - INR 164 cr	BRL 81 mil - BRL 104 mil	ZAR 279 mil - ZAR 360 mil	TRY 288 mil - TRY 372 mil	MXN 311 mil – MXN 401 mil	₩22 bil - ₩28 bil	CAD 21.2 mil – CAD 27.4 mil	AUD 24.1 mil – AUD 31.1 mil mil	NGN 6.7 bil – NGN 8.7 bil
7	Over USD $20 mil	Over ¥142 mil	Over ￥2.9 bil	Over EUR 20 mil	Over AED 73 mil	Over INR 164 cr	Over BRL 104 mil	Over ZAR 360 mil	Over TRY 372 mil	Over MXN 401 mil	Over ₩28 bil	Over CAD 27.4 mil	Over AUD 31.1 mil	Over NGN 8.7 bil
8	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know / refused	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /	DNRO: Don’t know /

	refused	refused		refused	refused	refused	refused	refused	refused	refused	refused	refused	refused	refused
9	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say	DNRO: Prefer not to say

ASK IF NOT LIKELY TO BUY/IMPORT FROM UK (B3_A = 1-5)

B4a. Reasons why unlikely to buy/import from UK

What are the main reasons why you would be unlikely to buy or import products and services from UK companies? PROBE: What other reasons?

MULTICODE. PROBE FULLY FOR AS MUCH DETAIL AS POSSIBLE. DO NOT READ OUT.

UK-SPECIFIC OBSTACLES:

4 Other countries provide better/faster products and services

5 Inefficient processes

6 Price is not competitive enough

7 Products/ services are not (widely) available

9 Credit facilities / credit rating criteria

10 Unfavourable exchange rates

11 Trade barriers / Requirement certifications

18 Brexit/UK not part of the EU/EEA

17 Not applicable /not attractive to our sector

21 UK trade policy makes buying/importing unattractive

22 Free Trade Agreement between the UK and my country not working well/too burdensome

23 No Free Trade Agreement between the UK and my country

24 Free Trade Agreement between the UK and my country is difficult to understand

25 New UK government

26 UK government doesn't have a credible plan for long-term economic growth

27 UK is an unstable business environment/economy/country

PERCEIVED/POTENTIAL OBSTACLES:

1 No contact with (any company in) UK

2 Not aware of opportunities/ Have not considered UK sources yet

3 No promotion/information/not enough information on UK (and/or UK products or services)

8 Unsure about export tax issues / high taxes

CULTURAL OBSTACLES:

12 Distance/ geographic location

13 Different cultures

14 Language barriers

28 Never visited the UK

OTHER:

15 Other (SPECIFY)

16 Don't know [EXCLUSIVE]

19 Environmental reasons

20 Covid-19 / coronavirus

21 Concerns around the war in Ukraine

22 Current inflation is prohibitive

ASK IF LIKELY TO BUY/IMPORT FROM UK (B3_A = 6-10)

B4b. What are the main reasons why you would be likely to buy or import products and services from UK companies? PROBE: What other reasons?

MULTICODE. PROBE FULLY FOR AS MUCH DETAIL AS POSSIBLE, DO NOT READ OUT

UK-SPECIFIC ATTRACTIONS:

2 Good / mature supply base

4 Price

5 Value for money

6 Quality/ good products/service/efficiency

7 Product availability

8 Expertise/ long history in the field

11 Good technology / Innovation

13 It is a stable business environment/economy/developed country/good place to do business

31 New UK government

17 Favourable exchange rates

23 Brexit opportunities

32 UK government's Industrial Strategy/long-term plan for economic growth

27 Trading arrangements between the UK and my country

28 Existence of a Free Trade Agreement between the UK and my country

COMPANY/HOME-COUNTRY RELATIONSHIP FACTORS:

1 Existing company / subsidiary in the UK

3 Presence of customers/Sufficient demand for products

9 Strong connection/ contact (including those who already work with the UK)

20 Funding

AFFINITY/CULTURAL FIT:

10 Transparency of doing business

12 Trust/like the mentality of the people

14 Seriousness / good reputation

18 Geographic location

29 Similar time zone

19 Common language/ English language

33 Previously visited the UK as a tourist

34 Previously studied in the UK

UK PUBLICITY:

16 Events with informative content

OTHER:

25 Environmental reasons

26 Covid-19 / coronavirus

30 Concerns around the war in Ukraine

21 Other (SPECIFY)

22 Don't know [EXCLUSIVE]

ASK IF BUY

B3b. Likelihood of buying vs. 12 months ago

Compared to 12 months ago, would you say that you are more or less likely to buy or import products or services from companies based in the UK?

PROBE IF MORE LIKELY: Is that much more likely or a little more likely?

PROBE IF LESS LIKELY: Is that less likely or a little less likely?

Much more likely

A little more likely

No difference

A little less likely

Much less likely

Don’t know [DO NOT READ OUT]

ASK IF BUY AND LIKELIHOOD HAS CHANGED (DUMMYVAR = BUY AND (B3B = 1-2 OR 4-5))

B3c. Reasons behind change in likelihood vs. 12 months ago

You mentioned that you were [PIPE IN CODE SELECTED AT B3b] to buy or import products or services from companies based in the UK compared to 12 months ago. In your own words, please tell us why.

MULTICODE, DO NOT READ OUT. PROBE IF RESPONSE UNCLEAR

UK-SPECIFIC ATTRACTIONS: [SHOW IF B3B = 1-2]

1 Good / mature supply base

2 Price

3 Value for money

4 Quality/ good products/service/efficiency

5 Product availability

6 Expertise/ long history in the field

7 Good technology / Innovation

8 It is a stable business environment/economy/developed country/good place to do business

9 Favourable exchange rates

10 Brexit opportunities

11 Trading arrangements between the UK and my country

12 Existence of a Free Trade Agreement between the UK and my country

50 New UK government

51 UK government's Industrial Strategy/long-term plan for economic growth

COMPANY/HOME-COUNTRY RELATIONSHIP FACTORS: [SHOW IF B3B = 1-2]

13 Existing company / subsidiary in the UK

14 Presence of customers/Sufficient demand for products

15 Strong connection/ contact (including those who already work with the UK)

16 Funding

AFFINITY/CULTURAL FIT: [SHOW IF B3B = 1-2]

17 Transparency of doing business

18 Trust/like the mentality of the people

19 Seriousness / good reputation

20 Geographic location

21 Similar time zone

22 Common language/ English language

54 Previously visited the UK as a tourist

55 Previously studied in the UK

UK PUBLICITY: [SHOW IF B3B = 1-2]

23 Events with informative content

UK-SPECIFIC OBSTACLES: [SHOW IF B3B = 4-5]

24 Other countries provide better/faster products and services

25 Inefficient processes

26 Price is not competitive enough

27 Products/ services are not (widely) available

28 Credit facilities / credit rating criteria

29 Unfavourable exchange rates

30 Trade barriers / Requirement certifications

31 Brexit/UK not part of the EU/EEA

32 Not applicable /not attractive to our sector

33 UK trade policy makes buying/importing unattractive

34 Free Trade Agreement between the UK and my country not working well/too burdensome

35 No Free Trade Agreement between the UK and my country

36 Free Trade Agreement between the UK and my country is difficult to understand

PERCEIVED/POTENTIAL OBSTACLES: [SHOW IF B3B = 4-5]

37 No contact with (any company in) UK

38 Not aware of opportunities/ Have not considered UK sources yet

39 No promotion/information/not enough information on UK (and/or UK products or services)

40 Unsure about export tax issues / high taxes

52 New UK government

53 UK government doesn't have a credible long-term plan for economic growth

CULTURAL OBSTACLES: [SHOW IF B3B = 4-5]

41 Distance/ geographic location

42 Different cultures

43 Language barriers

56 Never visited the UK

OTHER: [SHOW IF B3B = 4-5]

44 Environmental reasons

45 Covid-19 / coronavirus

46 Concerns around the war in Ukraine

47 Current inflation is prohibitive

SHOW TO ALL

48 Other (SPECIFY)

49 Don't know [EXCLUSIVE]

ASK IF BUY

B5d. Sources of information on buying/importing from abroad

Which organisation (or type of organisation), if any, would you be most likely to approach for help or advice on buying or importing goods or services from abroad? PROBE: What others?

MULTICODE, DO NOT READ OUT

IN DOMESTIC COUNTRY (WHERE RESPONDENT BASED):

2 Domestic country's chamber of commerce/trade association/industry body

3 Domestic country's government trade department/agency/embassy

8 Consultancies/Other private companies in domestic market

IN TARGET COUNTRY:

4 Embassy/government of target country

13 Consultancies/Private companies in the target market

14 Target country's chamber of commerce/trade association/industry body

15 Target country's government trade department/agency/embassy

17 Target country's economic attaché

18 UK Embassy/government/DBT/UK Export Finance

19 UK trade association/industry body

INTERNATIONAL ORGANISATIONS/SOURCES:

6 International trade association/industry body

IN RESPONDENT'S OWN COMPANY:

9 Overseas office of the company

1 UK office of the company

5 Internal specialists within own company

GENERAL SOURCES (LOCATION NOT SPECIFIED):

10 Banks

11 Export Credit Agencies

12 Personal networks/ existing contractual relationships/ Businesses community forum

7 Internet search for relevant companies

23 Shipping/freight companies

OTHER:

16 Not our decision (We go according to the procurement policy) [EXCLUSIVE]

20 Others (SPECIFY)

21 Don't know [EXCLUSIVE]

22 None [EXCLUSIVE]

ASK IF INVEST

B6. Likelihood to invest in next 3 years

How likely, if at all, is it that your organisation [S2a=2: will start; S2a=1: will continue] to expand or invest in the following countries in the next three years?

(CLARIFY IF NECESSARY: Until [current month] 2027. Please give a score between 1 and 10 where 1 would mean you are not at all likely and 10 that you are certain to.

		1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**(DO NOT READ OUT) Don't know**
A	United Kingdom	1	2	3	4	5	6	7	8	9	10	11
C	Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
F	The United States of America (PROG: DO NOT DISPLAY FOR USA	1	2	3	4	5	6	7	8	9	10	11

	RESPONDENTS)											
H	Japan (PROG: DO NOT DISPLAY FOR JAPAN RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
L	Republic of Ireland	1	2	3	4	5	6	7	8	9	10	11
M	France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
N	Singapore	1	2	3	4	5	6	7	8	9	10	11
O	The Netherlands	1	2	3	4	5	6	7	8	9	10	11

ASK IF NOT LIKELY TO EXPAND/INVEST IN UK (B6_A = 1-5)

B6a. Reasons against expanding/investing in the UK

What are the main reasons why you would be unlikely to expand to or invest in the UK?... PROBE: What other reasons?

MULTICODE, PROBE FULLY FOR AS MUCH DETAIL AS POSSIBLE. DO NOT READ OUT

UK-SPECIFIC OBSTACLES:

4 Bureaucratic problems

27 Political reasons

28 Legal restrictions

5 High corporate tax rates/business rates, VAT, PAYE

6 High personal tax rates

8 Unfavourable exchange rate

10 Lack of skills among UK workforce

14 Negative experiences in the past

16 Poor quality of UK products/services

PERCEIVED/POTENTIAL OBSTACLES:

1 Do not have (enough) information/ knowledge

2 Not enough demand for our goods/services

3 Too much competition already

7 Difficulty accessing finance

9 Difficult to enter the UK market / trade barriers

11 Lack of contacts/difficult to access business networks

12 Difficulty in obtaining visas

15 The risk of Brexit/lack of access to European Union

23 UK trade policy / Bilateral Investment Treaty makes investment unattractive

24 Free Trade Agreement between the UK and my country not working well/too burdensome

25 No Free Trade Agreement between the UK and my country

26 Free Trade Agreement between the UK and my country is difficult to understand

30 New UK government

31 UK government doesn’t have a credible long-term plan for economic growth

32 UK is an unstable business environment/economy/country

33 Poor future prospects for my sector

CULTURAL OBSTACLES:

13 Language issue

17 Physical safety/terror threat

22 Distance / geographic location

34 Never visited the UK

OTHER:

20 Environmental reasons

21 Covid-19 / coronavirus

18 Other (SPECIFY)

19 Don't know [EXCLUSIVE]

22 Concerns around the war in Ukraine

23 Current inflation is prohibitive

ASK IF LIKELY TO EXPAND/INVEST IN UK (B6_A = 6-10)

B6b. Reasons for likely expansion/investment in UK

What are the main reasons why you are likely to expand to or invest in the UK? PROBE: What other reasons?

MULTICODE, PROBE FULLY FOR AS MUCH DETAIL AS POSSIBLE. DO NOT READ OUT.

UK-SPECIFIC ATTRACTIONS:

3 Prestigious/recognised country/stable

6 Opportunity for expansion/growth of business operations

7 Existence of market for our product(s)/growing market

8 Price/competitiveness/operating costs

9 Favourable exchange rates

10 Good financial incentives/tax credits/legal environment

11 Contract/IP rights and protections

12 Good business environment/good business opportunities

13 Easy-to-do/set up business

14 Good transport infrastructure

16 Gateway to other markets/can serve as a hub (Europe, Commonwealth, North America)

17 Skilled workforce

19 UK reputation for innovation

28 Partnerships/ learning new practices from UK companies

26 Trading arrangements between the UK and my country

27 Existence of a Free Trade Agreement between the UK and my country

30 New UK government

31 UK government's Industrial Strategy/long-term plan for economic growth

32 It is a stable business environment/economy/country

33 Good future prospects for my sector

COMPANY/HOME-COUNTRY RELATIONSHIP FACTORS:

1 Currently have an operation in the area/Already investing in the UK/know the market well

2 Previous experience/good existing relationship

5 Other businesses like mine/from my country are succeeding there

18 Ease of obtaining visas

AFFINITY/CULTURAL FIT:

4 Common language/English language

15 Alignment of domestic and UK markets/regulations

24 Geographic location

25 Similar time zone

34 Previously visited the UK as a tourist

35 Previously studied in the UK

OTHER:

22 Environmental reasons

23 Covid-19 / coronavirus

29 Concerns around the war in Ukraine

20 Other (SPECIFY)

21 Don't know/ Not applicable [EXCLUSIVE]

ASK IF INVEST

B6a1. Likelihood to invest in the UK vs 12M ago

Compared to 12 months ago, would you say that you are more or less likely to expand or invest in the UK?

PROBE IF MORE LIKELY: Is that much more likely or a little more likely?

PROBE IF LESS LIKELY: Is that less likely or a little less likely?

Much more likely

A little more likely

No difference

A little less likely

Much less likely

Don’t know [DO NOT READ OUT]

ASK IF INVEST

B6a2. Reasons behind change in likelihood vs. 12M ago

You mentioned that you were [PIPE IN CODE SELECTED AT QB6a1] to expand or invest in the UK compared to 12 months ago. In your own words, please tell us why.

MULTICODE, DO NOT READ OUT

UK-SPECIFIC ATTRACTIONS: [SHOW IF B6A1 = 1-2]

1 Prestigious/recognised country/stable

2 Opportunity for expansion/growth of business operations

3 Existence of market for our product(s)/growing market

4 Price/competitiveness/operating costs

5 Favourable exchange rates

6 Good financial incentives/tax credits/legal environment

7 Contract/IP rights and protections

8 Good business environment/good business opportunities

9 Easy-to-do/set up business

10 Good transport infrastructure

11 Gateway to other markets/can serve as a hub (Europe, Commonwealth, North America)

12 Skilled workforce

13 UK reputation for innovation

14 Partnerships/ learning new practices from UK companies

15 Trading arrangements between the UK and my country

16 Existence of a Free Trade Agreement between the UK and my country

55 New UK government

56 UK government's Industrial Strategy/long-term plan for economic growth

57 It is a stable business environment/economy/country

58 Good future prospects for my sector

COMPANY/HOME-COUNTRY RELATIONSHIP FACTORS: [SHOW IF B6A1 = 1-2]

17 Currently have an operation in the area/Already investing in the UK/know the market well

18 Previous experience/good existing relationship

19 Other businesses like mine/from my country are succeeding there

20 Ease of obtaining visas

AFFINITY/CULTURAL FIT: [SHOW IF B6A1 = 1-2]

21 Common language/English language

22 Alignment of domestic and UK markets/regulations

23 Geographic location

24 Similar time zone

59 Previously visited the UK as a tourist

60 Previously studied in the UK

UK-SPECIFIC OBSTACLES: [SHOW IF B6A1 = 4-5]

25 Bureaucratic problems

26 Political reasons

27 Legal restrictions

28 High corporate tax rates/business rates, VAT, PAYE

29 High personal tax rates

30 Unfavourable exchange rate

31 Lack of skills among UK workforce

32 Negative experiences in the past

33 Poor quality of UK products/services

PERCEIVED/POTENTIAL OBSTACLES: [SHOW IF B6A1 = 4-5]

34 Do not have (enough) information/ knowledge

35 Not enough demand for our goods/services

36 Too much competition already

37 Difficulty accessing finance

38 Difficult to enter the UK market / trade barriers

39 Lack of contacts/difficult to access business networks

40 Difficulty in obtaining visas

41 The risk of Brexit/lack of access to European Union

42 UK trade policy / Bilateral Investment Treaty makes investment unattractive

43 Free Trade Agreement between the UK and my country not working well/too burdensome

44 No Free Trade Agreement between the UK and my country

45 Free Trade Agreement between the UK and my country is difficult to understand

61 New UK government

62 UK government doesn't have a credible long-term plan for economic growth

63 UK is an unstable business environment/economy/country

64 Poor future prospects for my sector

CULTURAL OBSTACLES: [SHOW IF B6A1 = 4-5]

46 Language issue

47 Physical safety/terror threat

48 Distance / geographic location

65 Never visited the UK

OTHER: [SHOW IF B6A1 = 4-5]

49 Environmental reasons

50 Covid-19 / coronavirus

51 Concerns around the war in Ukraine

52 Current inflation is prohibitive

SHOW TO ALL

53 Other (SPECIFY)

54 Don't know [EXCLUSIVE]

ASK IF INVEST

B7d. Sources of information about investing abroad

Which organisation (or type of organisation), if any would you be most likely to approach for help or advice on expanding or investing in other countries? PROBE: What others?

MULTICODE, DO NOT READ OUT

IN DOMESTIC COUNTRY (WHERE RESPONDENT BASED):

1 Accounting/Insurance firms/ Legal/law firms/other private companies in domestic market

4 Bank/venture capital/investment management firm in domestic market

7 Domestic country's chamber of commerce/trade association/industry body

8 Domestic country's government trade department/agency/embassy

IN TARGET COUNTRY:

3 Bank/venture capital in target market

5 Target country’s Chamber of Commerce

6 Target country’s Embassy/government

9 Embassy/government/agency/other public sector body of target country

14 Private companies in the target country

15 Target country's chamber of commerce/ trade association/industry body

16 Target market's trade association/industry body

24 Investment promotion agencies in target market

INTERNATIONAL/REGIONAL ORGANISATIONS/SOURCES:

19 Cooperation council (GCC / Gulf)

20 The IDC

IN RESPONDENT’S OWN COMPANY:

10 Internal specialists within own company

GENERAL SOURCES (LOCATION NOT SPECIFIED):

2 Consultancy agencies/companies

11 Internet search for relevant companies

12 Internet search for sector information/market

13 Personal networks

17 Visiting a trade show

23 Shipping/freight companies

OTHER:

18 Depends on country

21 Others (SPECIFY)

22 Don't know [EXCLUSIVE]

PROG: TIMESTAMP 3

SECTION C: ASSOCIATION WITH KEY ATTRIBUTES

ASK ALL

C1. Favourability towards UK

Now thinking specifically about trading with or investing in the UK… how favourable or unfavourable are you towards the UK as a whole…

SINGLECODE

Very favourable

Somewhat favourable

Neither favourable nor unfavourable

Somewhat unfavourable

Very unfavourable

Don't know [DO NOT READ OUT]

27.

28. ASK ALL

29. C1a. UK government influence on favourability

30. Still thinking specifically about trading with or investing in the UK, to what extent could the UK Government influence how favourable or unfavourable you are towards the UK as a whole?

31. SINGLECODE

1. A great deal
2. A fair amount
3. Not very much
4. Not at all
5. Don't know

ASK IF BUY

C2_a. Factors of importance when buying/importing from abroad

Please tell me how important you consider each of the following when it comes to making decisions about whether to buy or import products and services from abroad. Please use a scale of 1 to 10, where 1 is not important at all and 10 is absolutely essential in the decision to buy or import from abroad.

RANDOMISE STATEMENTS. READ OUT. CODE 99 IF 'DON'T KNOW'

	1	2	3	4	5	6	7	8	9	10
Reputation for providing innovative and creative products or services										
HIGH QUALITY PRODUCTS AND SERVICES										
Competitive pricing										
WORKING WITHIN A HIGH QUALITY, RELIABLE INFRASTRUCTURE										
Open and welcoming to international business										
Shares the same working values and practices as businesses in my country										
Environmentally friendly products and services										
Based in a country with a credible long-term plan for economic growth and stability										

ASK IF BUY AND NOT GERMANY OR FRANCE

C2a2a/C2A2b. Factor association with UK, Germany, France, the Netherlands, buyers

Thinking about the same reasons, how much do you associate each one with companies in PROGRAMMER: ALTERNATE ORDER OF < the United Kingdom or Germany/France/the Netherlands> AND < Germany/France/the Netherlands or the United Kingdom>?

Please use a scale of 1-10, where 1 means you do not associate them at all with companies in this country, and 10 means you fully associate them with companies in this country.

READ OUT EACH STATEMENT, TAKING SCORE ON SCALE FOR EACH COUNTRY SEPARATELY

SPLIT SAMPLE TO ASK ABOUT THE UK AND GERMANY (33%), THE UK AND FRANCE (33%) OR THE UK AND THE NETHERLANDS (33%)

PRESENT STATEMENTS IN SAME RANDOM ORDER SHOWN AT C2a. RANDOMISE ORDER IN WHICH UK AND OTHER COUNTRY IS ASKED FIRST (FIXED PER INTERVIEW). CODE 99 IF 'DON'T KNOW'

	1	2	3	4	5	6	7	8	9	10
Reputation for providing innovative and creative products or services										
HIGH QUALITY PRODUCTS AND SERVICES										
Competitive pricing										
WORKING WITHIN A HIGH QUALITY, RELIABLE INFRASTRUCTURE										
Open and welcoming to international business										
Shares the same working values and practices as businesses in my country										

Environmentally friendly products and services										
Based in a country with a credible long-term plan for economic growth and stability										

ASK IF BUY AND GERMANY OR FRANCE

C2a2c/C2A2d. Factor association with UK and the USA, buyers

Thinking about the same reasons, how much do you associate each one with companies in PROGRAMMER: ALTERNATE ORDER OF < the United Kingdom or the USA> AND < the USA or the United Kingdom>?

Please use a scale of 1-10, where 1 means you do not associate them at all with companies in this country, and 10 means you fully associate them with companies in this country.

READ OUT EACH STATEMENT, TAKING SCORE ON SCALE FOR EACH COUNTRY SEPARATELY

PRESENT STATEMENTS IN SAME RANDOM ORDER SHOWN AT C2a. RANDOMISE ORDER IN WHICH UK AND USA IS ASKED FIRST (FIXED PER INTERVIEW). CODE 99 IF 'DON'T KNOW'

	1	2	3	4	5	6	7	8	9	10
Reputation for providing innovative and creative products or services										
HIGH QUALITY PRODUCTS AND SERVICES										
Competitive pricing										
WORKING WITHIN A HIGH QUALITY, RELIABLE INFRASTRUCTURE										
Open and welcoming to international business										
Shares the same working values and practices as businesses in my country										
Environmentally friendly products and services										

Based in a country with a credible long-term plan for economic growth and stability										

ASK IF INVEST

C2b. Factors of importance when investing abroad

Please tell me how important you would rate each of the following reasons when it comes to making decisions about where to expand operations or invest abroad. Please use a scale of 1 to 10, where 1 is not important at all and 10 is absolutely essential in the decision to expand operations or invest abroad.

RANDOMISE STATEMENTS. READ OUT. CODE 99 IF 'DON'T KNOW'

	1	2	3	4	5	6	7	8	9	10
Access to relevant skills and labour										
Competitive set up costs										
High quality, reliable infrastructure										
Important business centre for my sector										
Open and welcoming to international business										
Gateway to other markets										
Potential to make high returns										
Environmentally friendly										
Credible long-term plan for economic growth and stability										

ASK IF INVEST AND NOT GERMANY OR FRANCE

C2B2a/C2B2b. Factor association with UK, Germany, France, the Netherlands, investors

Thinking about the same factors, how much do you associate each one with PROGRAMMER: ALTERNATE ORDER OF < the United Kingdom or Germany/France/The Netherlands> AND < Germany/France/The Netherlands or the United Kingdom>? Please use a scale of 1-10, this time where 1 means you do not associate them at all with this country and 10 means you fully associate them with this country.

READ OUT EACH STATEMENT, TAKING SCORE ON SCALE FOR EACH COUNTRY SEPARATELY

SPLIT SAMPLE TO ASK ABOUT THE UK AND GERMANY (33%), THE UK AND FRANCE (33%) OR THE UK AND THE NETHERLANDS (33%)

PRESENT STATEMENTS IN SAME RANDOM ORDER SHOWN AT C2a. RANDOMISE ORDER IN WHICH UK AND OTHER COUNTRY IS ASKED FIRST (FIXED PER INTERVIEW). CODE 99 IF 'DON'T KNOW'

	1	2	3	4	5	6	7	8	9	10
Access to relevant skills and labour										
Competitive set up costs										
High quality, reliable infrastructure										
Important business centre for my sector										
Open and welcoming to international business										
Gateway to other markets										
Potential to make high returns										

Environmentally friendly										
Credible long-term plan for economic growth and stability										

ASK IF INVEST AND GERMANY OR FRANCE

C2B2c/C2B2d. Factor association with UK and the USA, investors

Thinking about the same factors, how much do you associate each one with PROGRAMMER: ALTERNATE ORDER OF <each of the United Kingdom and the USA> AND < each of the USA and the United Kingdom>? Please use a scale of 1-10, this time where 1 means you do not associate them at all with this country and 10 means you fully associate them with this country.

READ OUT EACH STATEMENT, TAKING SCORE ON SCALE FOR EACH COUNTRY SEPARATELY

PRESENT STATEMENTS IN SAME RANDOM ORDER SHOWN AT C2b. RANDOMISE ORDER IN WHICH UK AND USA IS ASKED FIRST (FIXED PER INTERVIEW). CODE 99 IF 'DON'T KNOW'

	1	2	3	4	5	6	7	8	9	10
Access to relevant skills and labour										
Competitive set up costs										
High quality, reliable infrastructure										
Important business centre for my sector										
Open and welcoming to international business										
Gateway to other markets										
Potential to make high returns										
Environmentally friendly										

Credible long-term plan for economic growth and stability										

PROG: TIMESTAMP 4

SECTION D: CAMPAIGN AWARENESS – PROMPTED RECALL

ASK ALL

D1. General recall

I am now going to ask you about promotional activity you might have seen, read or heard. Please have a think about anything you may have seen, read or heard recently which was promoting foreign business opportunities in another country (such as foreign investments or opportunities to buy products and services from organisations in that country).

This may include events you have attended, advertising you have seen online, on posters, or newspapers/magazines, articles read in newspapers/magazines, received via email.

Have you seen any such promotional activity for… [READ OUT EACH COUNTRY IN TURN]

SINGLECODE, RANDOMISE ORDER.

	YES	NO	(DO NOT READ OUT) DON'T KNOW/ NOT SURE
United Kingdom	1	2	3
Germany (PROG: DO NOT DISPLAY IN GERMANY)	1	2	3
China (PROG: DO NOT DISPLAY IN CHINA)	1	2	3
United States of America (PROG: DO NOT DISPLAY IN USA)	1	2	3
Japan (PROG: DO NOT DISPLAY IN JAPAN)	1	2	3
Republic of Ireland	1	2	3
France (PROG: DO NOT DISPLAY IN FRANCE)	1	2	3
The Netherlands	1	2	3
Portugal	1	2	3
Australia (PROG: DO NOT DISPLAY IN AUSTRALIA)	1	2	3

ASK IF MENTIONED UK/GB AT UR1 OR D1 ((UR1 = 5 OR 18) OR (D1_1 = 1))

D2. Where UK promotion seen

You said that you have seen/heard something promoting business opportunities in the United Kingdom.

Can you recall where you saw/heard the United Kingdom being promoted?

DO NOT READ OUT. PROMPT. MULTICODE.

PRINT PRESS:

1 Advertisements in magazines, newspapers or trade press

2 Articles /photos in magazines, newspapers or trade press

MEDIA:

3 TV advertisement

15 From a TV documentary/ in the news

4 On posters, billboards or outdoor advertising digital screens [Please probe on where respondents have seen posters – only select this code if no other answer apply after probing]

SOCIAL MEDIA SITES:

7 LinkedIn

8 X/Twitter

9 Facebook

26 Instagram

10 On other social networking sites (e.g. Xing!)

OTHER ONLINE (SPECIFIC & GENERAL):

12 On a mobile application/App

5 Online advertisement / banner

6 Articles / photos online

28 Videos online

29 Podcasts

SPECIFIC VENUES/EVENTS:

13 At trade shows / events / conferences / exhibitions/ talks

14 At the airport

27 Webinar / virtual event

17 From/at the British Embassy/British Consulate

SPECIFIC SOURCES:

18 From the national Government

19 Via an organisation representing businesses (e.g. DBT, Chamber of Commerce)

20 Via UK Export Finance or a Trade finance organization

OTHERS:

16 From friends, family or colleagues

21 Other (SPECIFY)

22 Can't remember [EXCLUSIVE]

ASK IF MENTIONED UK/GB AT UR1 OR D1 ((UR1 = 5 OR 18) OR (D1_1 = 1))

D3. Contents of UK promotion

What do you remember about what was being said about the United Kingdom, from what you saw or heard? PROBE IF NECESSARY: What do you remember about the advertising or promotional activity you saw/heard?

DO NOT READ OUT. PROMPT. MULTICODE. ALL REFERENCES TO 'GREAT' WITHIN THE CONTEXT OF THE CAMPAIGN SHOULD BE ASSIGNED TO CODE 4. GENERAL COMMENTS REMARKING THAT THE UK IS A GOOD (OR GREAT, WITHOUT MENTION OF THE CAMPAIGN) SHOULD BE ASSIGNED TO CODE 1 OR 2 - PROBE FURTHER IF UNCLEAR WHETHER IN REFERENCE TO INVESTMENT (CODE 1) OR TO TRADE (CODE 2).

1. UK/Britain is a good place in which to invest (non-specific)

2. UK/Britain is a good place to trade with (non-specific)

3. UK/Britain is ready to trade

4. UK/Britain is GREAT to do business with (INT: NOTE SPECIFIC CAPITALISATION OF 'GREAT')

5. UK/Britain is a good place for business collaboration

23. To see things differently, choose the UK/Britain

20. UK/Britain sees things differently

21. UK/Britain is a sustainable place to do business with

22. Great Trade opens doors

23. UK/Britain is a stable investment partner

24. UK/Britain has high-growth industries

25. The UK government has a long-term economic plan

6.Creativity/creative place

7. Innovation/innovative place

8. Entrepreneurial/encourages entrepreneurs/welcomes entrepreneurs

9. UK/Great Britain is a land alive with opportunity/a place with lots of opportunity/opportunities

10. Open place to do business

11. Has good technology/place for technology/digital

12. Green/environmentally-friendly business location

13. Other businesses are succeeding in the UK

14. I recall seeing messaging that is relevant to my sector

15. Tourism

16. No unfair trading/tariffs

17. Free Trade Agreements/FTAs

18. Other (SPECIFY)

19. Don’t know/not sure/can’t remember [EXCLUSIVE]

ASK ALL

D4. Website access

I would now like you to take a look at some visuals on a website and tell me if you have seen them or similar ones before – either at events or in the wider media such as newspapers, magazines or online.

Is it possible for you to access a website at this present moment?

SINGLECODE

Yes

No [GO TO D4B]

ASK IF HAS WEBSITE ACCESS (D4 = 1)

D4a. Prompted recall using assets

Please go to [website link] and click on the creative page.

Have you seen any of these visuals, or others similar to this one before this interview? Please note that some of the text may have been in another language.

SINGLECODE

1. Yes, seen one or more of these

2. Yes, seen something similar with the GREAT logo

3. No, I have not seen anything like these

4. Don't know [DO NOT READ OUT]

ASK IF SAYS HAVE SEEN (D4A = 1-2)

D4AI. QC check

Please can you give me a brief description of what you see on the screen?

INT: THIS IS A CHECK, DO NOT READ OUT

Respondent gives an accurate description

Respondent does not appear to have seen the visuals

ASK IF HAS WEBSITE ACCESS (D4 = 1)

D4AII. Logo awareness

Please now click on the word 'Logo' on screen.

Looking at this image, do you remember seeing this before today or any similar ones including the reference to 'GREAT'? This may have been on promotional materials, letters, adverts or other information sources and may have been in another language.

INT: IF NECESSARY EXPLAIN PROMOTIONAL MATERIALS CAN INCLUDE THINGS LIKE EVENT LOGOS, BROCHURES, AND TV OR ONLINE ADVERTS

Yes, this image

Yes, seen something similar with the GREAT logo

No, not seen anything like this

Don’t know [DO NOT READ OUT]

ASK IF NO WEBSITE, OR DOESN’T APPEAR TO HAVE ACCESSED (D4 = 2 OR D4AI = 2)

D4B. GREAT recall without assets

Can you recall having seen, read or heard any advertising, events or promotion which states ‘To see things differently, choose the UK’, or which includes phrases using the word GREAT to promote ‘Great Britain’ as a place to do business with?

INTERVIEWER: BE EXPLICIT ABOUT ‘GREAT’. SPELL OUT IF NECESSARY (“G-R-E-A-T”).

These advertisements, events or promotional items include the words Britain and Northern Ireland and part of the red, white and blue union flag. They may also have included images relating to UK business.

Yes, remember seeing/hearing

No – have not seen [GO TO D6B INSTRUCTION]

Don’t know/not sure [DO NOT READ OUT; GO TO D6B INSTRUCTION]

GREAT recogniser dummy variable	
(((D4A = 1 OR 2) AND D4AI = 1) OR (D4AII = 1 OR 2) OR (D4B = 1))	GREAT recogniser
((D4A = 1 OR 2) AND D4AI = 2 AND (D4AII = 3 OR 4) AND (D4B = 2 OR 3)) OR ((D4A = 3 OR 4) AND (D4AII = 3 OR 4))	GREAT non-recogniser

ASK ALL GREAT RECOGNISERS

D4c. Where saw/heard GREAT

Where do you remember seeing or hearing about GREAT?

MULTICODE, DO NOT READ OUT, PROMPT

PRINT PRESS AD:

8 Print media / advertising

OTHER MEDIA AD:

11 TV

20 On posters, billboards or outdoor advertising digital screens

SOCIAL MEDIA SITES:

15 Twitter

16 LinkedIn

22 Facebook

OTHER ONLINE (NON-SPECIFIC):

12 Website / Online / Internet

13 Emails

23 Podcasts

SPECIFIC PLACES/EVENTS:

2 Trade show / events / conferences / exhibitions / talks

9 British business centres, organisations (e.g. British Chamber of Commerce, Consulate, Embassy)

6 Hotel

10 Airport

21 Central Business District (e.g. Times Square, New York)

5 Somewhere in UK (unspecified)

OTHERS:

7 People / colleagues / friends

18 Other (SPECIFY)

19 Can’t remember [EXCLUSIVE]

ASK ALL GREAT RECOGNISERS

D5. How GREAT campaign influenced attitude towards UK investment/buying

When you originally saw any of this promotional activity, would you say it made you feel more positive or more negative towards investing in or trading with the United Kingdom, or did it make no difference?

IF MORE POSITIVE: Is that much more positive or a little more positive?

IF MORE NEGATIVE: Is that much more negative or a little more negative?

SINGLECODE

1. Much more positive
2. A little more positive
3. Made no difference
4. A little more negative
5. Much more negative
6. Don’t know/can’t remember [DO NOT READ OUT]

ASK ALL GREAT RECOGNISDERS

D6. GREAT campaign diagnostics

And from what you can remember about the GREAT Britain campaign advertising, events or promotional activity, how much do you agree or disagree with the following statements?

Please use a scale of 1 to 10, where 1 means that you strongly disagree and 10 that you strongly agree with the statement.

SINGLECODE, RANDOMISE ORDER OF STATEMENTS

	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**(DO NOT READ OUT) Don’t know**
was different from promotions for other foreign business markets	1	2	3	4	5	6	7	8	9	10	11

IF INVEST: made you think now is a good time to expand to or invest in the UK	1	2	3	4	5	6	7	8	9	10	11
told you something new about the UK	1	2	3	4	5	6	7	8	9	10	11
was relevant to you	1	2	3	4	5	6	7	8	9	10	11
motivates you to do business with the UK	1	2	3	4	5	6	7	8	9	10	11
(IF BUY): has had a direct impact on the amount of money your company has spent on procuring products and services from the UK (IF INVEST): has had a direct impact on the amount of money your company has spent on investing in the UK.	1	2	3	4	5	6	7	8	9	10	11
Has increased your confidence that the UK has a long-term plan for the economy	1	2	3	4	5	6	7	8	9	10	11
has increased your confidence that the UK offers a strong environment for high-growth industries	1	2	3	4	5	6	7	8	9	10	11

ASK IF REMEMBERS ANY PROMOTION, GREAT OR OTHER, ABOUT UK ((D4A = 1 OR 2) OR (D4AI = 1 OR 2) OR (D4ALL = 1 OR 2) OR (D4B = 1 AND D1_1 = 1) OR (UR1 = 5 OR 18))

D6B. Whether took any action as a result of UK promotion

Did you take any action as a result of seeing this advertising, or any other promotions for the United Kingdom?

SINGLECODE

1. Yes
2. No, no action taken
3. Don’t know

ASK IF TOOK ACTION (D6B = 1)

D6C. Action taken as a result of UK promotion

What did you do? PROBE: What actions did you take (even if only minor ones)?

MULTICODE, DO NOT READ OUT, PROMPT.

ONLINE:

1 Visited the GREAT website

19 Downloaded general information from the GREAT website

23 Bookmarked the GREAT website for future reference

2 Submitted an online query form on the GREAT website

25 Visited the GOV.UK website (apart from the GREAT website)

26 Looked for more information about the UK government's Industrial Strategy or plan for economic growth

VERBAL CONTACT/DIRECT COMMUNICATION:

3 Spoke with a trade/investment advisor

6 Spoke with potential UK suppliers about business opportunities

10 Spoke with existing business contacts in the UK about potential opportunities

11 Spoke with other sector specialists

SPECIFIC IN-COMPANY ACTIONS:

4 Considered UK companies in a procurement exercise

5 Shortlisted the UK as a potential market to invest in

12 Researched potential UK suppliers/invest opportunities (not GREAT website specific)

13 Researched rules/regulations of doing business with the UK (e.g. regulations, tax, logistics, representatives)

14 Researched other aspects of the UK markets (e.g. demand, competitors, customers, distribution channels, promotion or visited the country)

OTHER SPECIFIC ACTIONS:

7 Bought from a British supplier

8 Attended a DBT event

9 Attended a general event because UK were present

24 Shared information with professional contacts

OTHER:

15 No action taken [EXCLUSIVE]

16 Don't Know [EXCLUSIVE]

17 Other (SPECIFY)

ASK ALL WITH RECALL/RECOGNISE GREAT AND ALREADY INVESTING OR BUYING/CONSIDERING IT IN THE UK (((D4ABUY = 1 OR 2) OR (D4AINVEST = 1 OR 2) OR (D4AII = 1 OR 2) OR (D4B = 1)) AND (S1C = 1 OR (B3A = 6-10) OR S2C = 1 OR (B6A = 6-10)))

D6D. GREAT impact on buying/investing

You mentioned earlier that

<IF S1c=1: you already buy from the UK /

IF S2c=1: you already invest in the UK /

IF S1c=1 AND S2c=1: you already buy from and invest in the UK /

IF S1c=2 AND B3_A=6-10: you are considering buying from the UK in the next 3 years /

IF S2c=2 AND B6_A=6-10: you are considering investing in the UK in the next 3 years / >

To what extent would you say that your interest in trading or investing in the UK was a direct result of the GREAT Britain campaign activity that you saw before today. Would you say the advertising campaign …?

READ OUT. SINGLE CODE. REVERSE ORDER PER INTERVIEW EXCL. DK.

1. Was 100% responsible - you definitely wouldn't be considering trading with or investing in the UK if you hadn't seen the campaign
2. Was 75% responsible – the campaign was the most important factor in making you interested in trading with or investing in the UK, but it was something that you'd been considering beforehand
3. Was 50% responsible – you were already thinking about trading with or investing in the UK, but the campaign still played an important role in raising your interest
4. Was 25% responsible – you were already thinking seriously about trading with or investing in the UK and the campaign only played a small part in your decision
5. The campaign had no real impact at all on your interest in trading with or investing in the UK
6. Don't know [DO NOT READ OUT]

PROG TIMESTAMP 5.

SECTION E: AWARENESS OF DBT, BREXIT AND KEY CONTACT INFORMATION

ASK IF INVEST. ROTATE ORDER OF E3B1 AND (E3B2 + E3) PER INTERVIEW

E3b1. Investment info sources

Which sources do you use to find out about opportunities of where to invest abroad?

ADD IF NECESSARY: In this context, 'invest' can also include expanding an existing business or starting up a new business in another country.

MULTICODE. DO NOT READ OUT, PROMPT ONLY.

1. Bloomberg
2. CNBC
3. CNN
4. Wired
5. Business Insider
6. Reuters
7. The Economist
8. MIT Tech Review
9. Nikkei
10. The Financial Times
11. Other business media
12. Sector/industry specific publications/magazines
13. External consultancies/sources (KPMG, PWC etc)
14. Social media – LinkedIn
15. Social media – Facebook
16. Social media – Twitter
17. Social media – Weibo
18. Social media – WeChat
19. Social media -Other
20. Other online sources – search engines e.g. Google, Baidu, Soso.com
21. Television – business news
22. Trusted industry experts
23. Domestic trade shows/ events

24. International trade shows/ events

23. Suppliers' websites
24. Business contacts outside your organization
25. Recommendations from friends/colleagues
26. Domestic government
23. International government websites

27. Other countries' embassies
28. Bank/venture capitalist
29. Webinars / virtual events
30. Podcasts
31. Other (SPECIFY)
32. DK [EXCLUSIVE]
33. None/Don't use [EXCLUSIVE]

ASK ALL

E3b2. Industry info sources

Which sources do you use to stay informed about your specific industry?

MULTICODE, DO NOT READ OUT, PROMPT ONLY.

1. Bloomberg
2. CNBC
3. CNN
4. Wired
5. Business Insider
6. Reuters
7. The Economist
8. MIT Tech Review
9. Nikkei
10. The Financial Times
11. Other business media
12. Sector/industry specific publications/magazines
13. External consultancies/sources (KPMG, PWC etc)
14. Social media – LinkedIn
15. Social media – Facebook
16. Social media – Twitter
17. Social media – Weibo
18. Social media – WeChat
19. Social media -Other
20. Other online sources – search engines e.g. Google, Baidu, Soso.com
21. Television – business news
22. Trusted industry experts
23. Domestic trade shows/ events
24. International trade shows/ events
23. Suppliers' websites
24. Business contacts outside your organization
25. Recommendations from friends/colleagues
26. Domestic government
23. International government websites

27. Other countries’ embassies
28. Bank/venture capitalist
29. Webinars / virtual events
30. Podcasts
31. Other (SPECIFY)
32. DK [EXCLUSIVE]
33. None/Don’t use [EXCLUSIVE]

ASK IF SELECTS TWO OR MORE OF CODES 1-20 AT E3B2

E3. Most used sources

And which of the sources you just mentioned do you use most often to stay informed about your industry?

PROG: SHOW ONLY OPTIONS SELECTED AT E3b2.

SINGLE CODE, DO NOT READ/PROMPT

1. Business media (Bloomberg/Financial Times /Wall Street Journal/Economist)
2. Sector/industry specific publications/magazines
3. External consultancies/sources (KPMG, PWC etc)
4. Social media – LinkedIn
5. Social media – Facebook
6. Social media – Twitter
7. Social media – Weibo
8. Social media – WeChat
9. Social media- Other
10. Other online sources – search engines e.g. Google, Baidu, Soso.com
11. Television – business news
12. Trusted industry experts
23. Domestic trade shows/ events
24. International trade shows/ events
13. Suppliers' websites
14. Business contacts outside your organization
15. Recommendations from friends/colleagues
16. Domestic government
25. International government websites
17. Other countries' embassies
18. Bank/venture capitalist
19. Webinars / virtual events
20. Other (SPECIFY)
21. DK [EXCLUSIVE]
22. None/Don't use [EXCLUSIVE]

ASK ALL

G3A1: Segmentation statements

I am going to read out some statements made by people in businesses like yours and for each one please tell me to what extent you agree or disagree. For these statements, please consider buying or importing products or services, or expanding operations of investing in other countries. Please use the following scale: agree strongly, agree slightly, neither agree nor disagree, disagree slightly, disagree strongly.

To what extent do you agree or disagree that…

RANDOMISE ORDER

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(DO NOT READ OUT) Don't know/can't remember
International growth is an exciting prospect for my business						
There is a lot of opportunity for my business to grow internationally						
There are too many risks in doing business internationally						
Free Trade Agreements make it easy to do business internationally						
The economic stability of a country is a key						

consideration when deciding where to do business internationally
A country’s political climate is important to me when deciding where to do business internationally
When exploring new international markets, increasing profit margins is a bigger priority for my business than the quality of products or investments
I enjoy exploring business opportunities in different countries
Free trade between different countries is the most effective way to encourage businesses and the global economy to grow
I actively keep up with industry news about international trade
Consideration of environmental impact is key when it comes to decision making in my business
Ethical considerations are just as important to my business as other considerations when choosing where to do business internationally
I feel operating in international markets aligns with my business’ long-term financial goals

Access to new technologies and innovation is an

important factor in where I choose to do business

I feel confident in my businesses' ability to do business internationally
I prefer to do business in countries that my own country has a Free Trade Agreement with
Government regulations and policies often hinder doing business internationally

SECTION F: FREE TRADE AGREEMENTS

ASK ALL FRANCE, GERMANY

FG1A. TCA Awareness

Are you aware of the Trade and Cooperation Agreement between the EU and the UK?

SINGLE CODE

1. Yes
2. No
3. Don’t know (DO NOT READ OUT)

ASK IF YES IN FG1A

FG1A1. Level of awareness about TCA

You said you were aware of the Trade and Cooperation Agreement between the EU and the UK. How much do you know about the Trade and Cooperation Agreement between the EU and the UK?

SINGLE CODE

1. A great deal
2. A fair amount
3. Not very much
4. Nothing at all
5. Don’t know (DO NOT READ OUT)

ASK ALL JAPAN, SOUTH AFRICA, MEXICO, SOUTH KOREA, CANADA, TURKEY, AUSTRALIA

FG2A. FTA Awareness

Are you aware of the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK?

ADD IF NECESSARY: Free trade is the international buying and selling of goods and services, without limits on the amount one country can sell to another, and without special taxes on purchases from a foreign country. Countries can make trade less restrictive by signing a Free Trade Agreement. This is an international agreement that removes or reduces barriers to trade between countries.

SINGLE CODE

1. Yes
2. No
3. Don't know (DO NOT READ OUT)

ASK IF YES TO FG2A

FG2A1. Level of awareness about FTA

You said you were aware of the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. How much do you know about the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK?

SINGLE CODE

1. A great deal
2. A fair amount
3. Not very much
4. Nothing at all
5. Don’t know (DO NOT READ OUT)

ASK IF JAPAN, MEXICO, CANADA, AUSTRALIA AND YES IN FG2A

FG2A2. CPTPP awareness

SINGLE CODE

You said you were aware of the Free Trade Agreement between [RESPONDENT’S CONTRY] and the UK. Would that be the reciprocal agreement between [RESPONDENT’S COUNTRY] and the UK, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership, also known as CPTPP, or both?

1. **Reciprocal agreement**
2. **CPTPP**
3. **Both**
4. **Don’t know (DO NOT READ OUT)**

ASK ALL JAPAN, SOUTH AFRICA, MEXICO, SOUTH KOREA, CANADA, TURKEY, AUSTRALIA

FG2B/FG2Ba/FG4B. FTA Impact on likelihood to buy/invest

There is now a Free Trade Agreement between the UK and [RESPONDENT'S COUNTRY] in place. [IF NOT AUSTRALIA: Previously, this was covered by the [IF JAPAN, SOUTH AFRICA, MEXICO, SOUTH KOREA, CANADA: Free Trade Agreement; IF TURKEY: Customs Arrangement] between [RESPONDENT'S COUNTRY]] and the European Union. [IF AUSTRALIA: Previously, trade between the UK and Australia was on World Trade Organisation terms.] Would you say that the UK Free Trade Agreement has made you more or less likely to do any of the following, or has it made no difference? Please think about reasons specifically relating to the trade agreement rather than about doing business with the UK in general.

PROMPT IF MORE LIKELY: Is that much more or a little more likely?

PROMPT IF LESS LIKELY: Is that much less or a little less likely?

ADD IF NECESSARY: Free trade is the international buying and selling of goods and services, without limits on the amount one country can sell to another, and without special taxes on purchases from a foreign country. Countries can make trade less restrictive by signing a Free Trade Agreement. This is an international agreement that removes or reduces barriers to trade between countries.

RANDOMISE ORDER. SINGLE CODE.

	Much more likely	A little more likely	No difference	A little less likely	Much less likely	DO NOT READ OUT: Don't know
Buy or import products or services from	**1**	**2**	**3**	**4**	**5**	**6**

companies in the UK						
Expand or invest in the UK	**1**	**2**	**3**	**4**	**5**	**6**

ASK IF MORE LIKELY TO BUY/INVEST (FG2B/FG2Ba/FG4B_1/2 = 1-2)

FG2B1. Why more likely to buy/invest as result of FTA

You said you are more likely to [pipe answer from FG2B/FG2Ba/FG4B] due to the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. Can I ask why you say that?

MULTICODE, DO NOT READ/PROMPT – PROBE IF RESPONDENTS GIVE REASONS THAT DON'T CLEARLY RELATE TO THE FTA

1. Simplified complex paperwork
2. Reduced duties/taxes/tariffs
3. Reduced cost of compliance with rules (e.g. rules of origin, or other admin burdens)
4. UK is now a more attractive market as a result of the Free Trade Agreement
5. Business confidence/certainty has increased
6. New/more/better opportunities created by the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
7. Increased supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
8. Improved processes around intellectual property
9. Other (Please specify)
10. Don't know [EXCLUSIVE]

ASK IF LESS LIKELY TO BUY INVEST (FG2B/FG2BA/FG4B_1/2 = 4-5)

FG2B2. Why less likely to buy/invest as a result of FTA

You said you are less likely to [pipe answer from FG2B/FG2Ba/FG4B] due to the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. Can I ask why you say that?

MULTICODE, DO NOT READ/PROMPT.

1. More complex paperwork
2. Increased duties/taxes/tariffs
3. Increased cost of compliance with rules (e.g. rules of origin, or other admin burdens)
4. UK is now a less attractive market as a result of the Free Trade Agreement
5. Business confidence/certainty has reduced
6. Worse/fewer opportunities created by the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
7. Reduced supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
8. Worse processes around intellectual property
9. Other (Please specify)
10. Don't know [EXCLUSIVE]

ASK ALL USA, BRAZIL, INDIA, CHINA, UAE, NIGERIA, SAUDI ARABIA

FG3A. Whether an FTA would impact on likelihood to buy/invest

Would a Free Trade Agreement between your country and the UK make you more or less likely to do any of the following, or make no difference? Please think about reasons specifically relating to the trade agreement rather than about doing business with the UK in general.

PROMPT IF MORE LIKELY: Is that much more or a little more likely?

PROMPT IF LESS LIKELY: Is that much less or a little less likely?

ADD IF NECESSARY: Free trade is the international buying and selling of goods and services, without limits on the amount one country can sell to another, and without special taxes on purchases from a foreign country. Countries can make trade less restrictive by signing a Free Trade Agreement. This is an international agreement that removes or reduces barriers to trade between countries.

	Much more likely	A little more likely	No difference	A little less likely	Much less likely	DO NOT READ OUT: Don't know
Buy or import products or services from companies in the UK	**1**	**2**	**3**	**4**	**5**	**6**
Expand or invest in the UK	**1**	**2**	**3**	**4**	**5**	**6**

ASK IF MORE LIKELY TO BUY/INVEST (FG3A_1/2 = 1-2)

FG2B1. Why more likely to buy/invest as result of potential FTA

You said you are more likely to [pipe answer from FG3A] due to the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. Can I ask why you say that?

MULTICODE, DO NOT READ/PROMPT – PROBE IF RESPONDENTS GIVE REASONS THAT DON'T CLEARLY RELATE TO THE FTA

1. Simplified complex paperwork
2. Reduced duties/taxes/tariffs
3. Reduced cost of compliance with rules (e.g. rules of origin, or other admin burdens)

4. UK is now a more attractive market as a result of the Free Trade Agreement
5. Business confidence/certainty has increased
6. New/more/better opportunities created by the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
7. Increased supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
8. Improved processes around intellectual property
9. Other (Please specify)
10. Don't know [EXCLUSIVE]

ASK IF LESS LIKELY TO BUY INVEST (FG3A_1/2 = 4-5)

FG2B2. Why less likely to buy/invest as a result of potential FTA

You said you are less likely to [pipe answer from FG3A] due to the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. Can I ask why you say that?

MULTICODE, DO NOT READ/PROMPT.

1. More complex paperwork
2. Increased duties/taxes/tariffs
3. Increased cost of compliance with rules (e.g. rules of origin, or other admin burdens)
4. UK is now a less attractive market as a result of the Free Trade Agreement
5. Business confidence/certainty has reduced
6. Worse/fewer opportunities created by the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
7. Reduced supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
8. Worse processes around intellectual property
9. Other (Please specify)
10. Don't know [EXCLUSIVE]

SECTION H: INVESTMENT TRANSFORMATION PROGRAMME

ASK IF LIKELY TO INVEST IN THE UK (B6A = 8-10)

H1B. Whether investment proposition from UK govt. would be considered

Government-led investment promotion agencies may provide investment opportunities, known as propositions, to foreign investors. This proposition is typically aligned to strategic governmental objectives and outlines specific business opportunities for prospective investors.

If the UK Government were to approach you with an investment proposition relevant to your business, to what extent would you be likely to consider it?

SINGLECODE

1. Very likely
2. Quite likely
3. Not very likely
4. Not at all likely
5. Don’t know

ASK IF INVEST

H2A. Factor importance in investment proposition

Please tell me how important you would rate each of the following factors when it comes to making decisions about whether to expand operations or invest in the UK. Please use a scale of 1 to 10, where 1 is not important at all and 10 is absolutely essential.

SINGLECODE, READ OUT

	1- Not important	2	3	4	5	6	7	8	9	10 – Absolutely essential
The financial incentives offered, for example grants or subsidies										
The availability of tailored individual investment support										
Introductions to the wider UK business network ahead of investing										
Being directly approached by the UK Government										

ASK IF INVEST

H3. Impact of ongoing support

Once you have made an initial expansion or investment into a country, to what extent, if at all, would ongoing support from that country's national Government influence your decisions to expand your operations or reinvest again?

For example, the support provided could include expansion mapping, help with risk management, provision of legal or regulatory updates, providing introductions or referrals, or suggestions of new investment opportunities or propositions.

SINGLECODE READ OUT

1. They would definitely be able to influence the decision
2. They would probably be able to influence the decision

3. They would probably not be able to influence the decision
4. They would definitely not be able to influence the decision
5. Don’t know [DO NOT READ OUT]

THANK AND CLOSE

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