

Department for
Business, Innovation,
Science and Trade

# International Buyers and Investors Study 2022

**Technical report**

26 November 2026

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# 1. Methodology

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.

## 1.1. 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 UK businesses who export whilst also facilitating inward and outward investment.

The GREAT Global Trade Campaign 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 Export Strategy, DBT's Outcome Delivery Plan, and the Net Zero 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 meet these objectives, Yonder conducted 3,762 interviews with businesses that have the potential to buy from and/or invest in other countries. Fieldwork took place in 15 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, and Nigeria. The survey was conducted using CATI (Computer Assisted Telephone Interviewing) by our fieldwork partners, between 12 October 2023 and 6 February 2023.

Consistent in approach with the previous wave of research, this survey has been designed to provide representative findings across the GREAT Global Trade campaign's priority audiences. The priority audiences include businesses that were likely to buy from/or invest internationally, rather than the business population as a whole in each market. In practice, this meant using an identical sample frame and design across each market to enable comparisons to be made. This methodology can be replicated to provide comparisons with future waves of the survey.

## 1.2. Sampling

### 1.2.1. Sampling population

The research focused on the campaign 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 in section 1.2.4. 'Sample selection'.

### 1.2.2. Sampling frame

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

### 1.2.3. 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 5 years (2018 to 2022).

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 2021 final set of interviews achieved. This was consistent with the approach adopted in the 2018, 2019, 2020,

and 2021 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 2021. As the incidence of businesses that had previously or were likely to buy from/or invest internationally varied considerably by sector, size and market, it was not possible to set precise 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.

A 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 in 2020, 2021, and 2022 the approach was carried out on around 40% to 50% of all interviews.

### 1.2.4. Sample selection

In total, 87,119 businesses were selected from the Dun and Bradstreet database in 2022. Table 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: Number of Dun and Bradstreet records by market**

| COUNTRY | TOTAL |
|---|---|
| Brazil | 6,000 |
| Canada | 6,000 |
| China | 6,000 |
| France | 6,000 |

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

| COUNTRY | TOTAL |
|---|---|
| Germany | 6,000 |
| India | 6,000 |
| 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 | 3,119 |
| TOTAL | 87,119 |

As shown in Table 1, 6,000 records were drawn for each market in total except Nigeria, for which 3,119 records were drawn. This reflects the size of the business universe in Nigeria after removing businesses for which telephone contact and senior decision maker information was unavailable (the total size of the business universe in Nigeria at the time of drawing the sample was 3,665).

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 Tables 2 to 4 below.

**Table 2: Dun and Bradstreet population profile for each market (by sector)[2]**

| Sector | BR (N) | BR (%) | CA (N) | CA (%) | CN (N) | CN (%) | FR (N) | FR (%) | DE (N) | DE (%) |
|---|---|---|---|---|---|---|---|---|---|---|
| A - Agriculture, Forestry and Fishing | 84 | 1% | 105 | 2% | 38 | 1% | 116 | 2% | 81 | 1% |
| B - Mining and Quarrying | 40 | 1% | 113 | 2% | 80 | 1% | 20 | 0% | 14 | 0% |
| C - Manufacturing | 1324 | 22% | 781 | 13% | 2840 | 47% | 1135 | 19% | 1561 | 26% |
| D - Electricity, Gas, Steam and Aircon | 27 | 0% | 24 | 0% | 89 | 1% | 14 | 0% | 72 | 1% |
| E - Water, Sewerage and Waste | 20 | 0% | 27 | 0% | 44 | 1% | 6 | 0% | 68 | 1% |
| F - Construction | 415 | 7% | 614 | 10% | 326 | 5% | 823 | 14% | 564 | 9% |
| G - Wholesale, Retail and Motor Repair | 2272 | 38% | 1708 | 28% | 1205 | 20% | 1805 | 30% | 1167 | 19% |
| H - Transport and Storage | 439 | 7% | 284 | 5% | 192 | 3% | 398 | 7% | 345 | 6% |
| I - Accommodation and Food Service | 71 | 1% | 208 | 3% | 59 | 1% | 183 | 3% | 114 | 2% |
| J - Information and Communication | 105 | 2% | 215 | 4% | 182 | 3% | 157 | 3% | 230 | 4% |
| K - Finance and Insurance | 172 | 3% | 316 | 5% | 170 | 3% | 197 | 3% | 335 | 6% |
| L - Real Estate | 84 | 1% | 144 | 2% | 248 | 4% | 61 | 1% | 97 | 2% |
| M - Professional, Scientific and Technical | 170 | 3% | 433 | 7% | 195 | 3% | 422 | 7% | 441 | 7% |
| N - Admin and Support | 72 | 1% | 22 | 0% | 5 | 0% | 73 | 1% | 94 | 2% |
| P - Education | 75 | 1% | 99 | 2% | 20 | 0% | 54 | 1% | 57 | 1% |
| Q - Health and Social Work | 217 | 4% | 321 | 5% | 76 | 1% | 215 | 4% | 388 | 6% |
| R - Arts, Entertainment and Recreation | 29 | 0% | 132 | 2% | 22 | 0% | 32 | 1% | 57 | 1% |

[2] 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. Percentages may not total 100 due to rounding.

| Sector | BR (N) | BR (%) | CA (N) | CA (%) | CN (N) | CN (%) | FR (N) | FR (%) | DE (N) | DE (%) |
|---|---|---|---|---|---|---|---|---|---|---|
| S - Other Services | 384 | 6% | 454 | 8% | 209 | 3% | 289 | 5% | 315 | 5% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% |

| Sector | IN (N) | IN (%) | JP (N) | JP (%) | SA (N) | SA (%) | TR (N) | TR (%) | AE (N) | AE (%) |
|---|---|---|---|---|---|---|---|---|---|---|
| A - Agriculture, Forestry and Fishing | 81 | 1% | 50 | 1% | 292 | 5% | 58 | 1% | 22 | 0% |
| B - Mining and Quarrying | 100 | 2% | 9 | 0% | 135 | 2% | 50 | 1% | 297 | 5% |
| C - Manufacturing | 1,533 | 26% | 947 | 16% | 471 | 8% | 2,433 | 41% | 945 | 16% |
| D - Electricity, Gas, Steam and Aircon | 80 | 1% | 16 | 0% | 7 | 0% | 51 | 1% | 17 | 0% |
| E - Water, Sewerage and Waste | 17 | 0% | 66 | 1% | 4 | 0% | 14 | 0% | 11 | 0% |
| F - Construction | 484 | 8% | 1,153 | 19% | 696 | 12% | 413 | 7% | 405 | 7% |
| G - Wholesale, Retail and Motor Repair | 1,954 | 33% | 1,212 | 20% | 867 | 14% | 2,067 | 34% | 2,633 | 44% |
| H - Transport and Storage | 232 | 4% | 349 | 6% | 62 | 1% | 326 | 5% | 396 | 7% |
| I - Accommodation and Food Service | 29 | 0% | 134 | 2% | 180 | 3% | 129 | 2% | 106 | 2% |
| J - Information and Communication | 412 | 7% | 214 | 4% | 79 | 1% | 68 | 1% | 208 | 3% |
| K - Finance and Insurance | 189 | 3% | 141 | 2% | 1,361 | 23% | 48 | 1% | 215 | 4% |
| L - Real Estate | 80 | 1% | 181 | 3% | 10 | 0% | 10 | 0% | 29 | 0% |
| M - Professional, Scientific & Technical | 245 | 4% | 172 | 3% | 45 | 1% | 118 | 2% | 262 | 4% |
| N - Admin and Support | 41 | 1% | 60 | 1% | 1 | 0% | 1 | 0% | 13 | 0% |
| P - Education | 102 | 2% | 91 | 2% | 111 | 2% | 25 | 0% | 23 | 0% |
| Q - Health and Social Work | 162 | 3% | 707 | 12% | 169 | 3% | 51 | 1% | 63 | 1% |
| R - Arts, Entertainment and Recreation | 31 | 1% | 86 | 1% | 25 | 0% | 9 | 0% | 27 | 0% |
| S - Other Services | 228 | 4% | 412 | 7% | 1,485 | 25% | 129 | 2% | 328 | 5% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% |

| Sector | US (N) | US (%) | MX (N) | MX (%) | KR (N) | KR (%) | AU (N) | AU (%) | NG (N) | NG (%) | (N) | (%) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A - Agriculture, Forestry and Fishing | 88 | 1% | 108 | 2% | 37 | 1% | 91 | 2% | 28 | 1% | 1,279 | 1% |
| B - Mining and Quarrying | 53 | 1% | 52 | 1% | 12 | 0% | 128 | 2% | 584 | 19% | 1,687 | 2% |
| C - Manufacturing | 948 | 16% | 1,805 | 30% | 2,623 | 44% | 1003 | 17% | 447 | 14% | 20,796 | 24% |
| D - Electricity, Gas, Steam and Aircon | 20 | 0% | 29 | 0% | 14 | 0% | 42 | 1% | 34 | 1% | 536 | 1% |
| E - Water, Sewerage and Waste | 44 | 1% | 20 | 0% | 53 | 1% | 26 | 0% | 4 | 0% | 424 | 0% |
| F - Construction | 695 | 12% | 467 | 8% | 706 | 12% | 685 | 11% | 163 | 5% | 8,609 | 10% |
| G - Wholesale, Retail and Motor Repair | 1396 | 23% | 2,024 | 34% | 1,158 | 19% | 1,141 | 19% | 498 | 16% | 23,107 | 27% |
| H - Transport and Storage | 219 | 4% | 354 | 6% | 232 | 4% | 275 | 5% | 167 | 5% | 4,270 | 5% |
| I - Accommodation and Food Service | 128 | 2% | 65 | 1% | 35 | 1% | 313 | 5% | 31 | 1% | 1,785 | 2% |
| J - Information and Communication | 252 | 4% | 162 | 3% | 245 | 4% | 283 | 5% | 125 | 4% | 2,937 | 3% |
| K - Finance and Insurance | 351 | 6% | 161 | 3% | 132 | 2% | 220 | 4% | 177 | 6% | 4,185 | 5% |
| L - Real Estate | 112 | 2% | 31 | 1% | 56 | 1% | 262 | 4% | 11 | 0% | 1,416 | 2% |
| M - Professional, Scientific and Technical | 464 | 8% | 326 | 5% | 251 | 4% | 550 | 9% | 262 | 8% | 4,356 | 5% |
| N - Admin and Support | 34 | 1% | 28 | 0% | 31 | 1% | 62 | 1% | 3 | 0% | 540 | 1% |
| P - Education | 277 | 5% | 62 | 1% | 56 | 1% | 117 | 2% | 38 | 1% | 1,207 | 1% |
| Q - Health and Social Work | 527 | 9% | 51 | 1% | 118 | 2% | 295 | 5% | 324 | 10% | 3,684 | 4% |
| R - Arts, Entertainment and Recreation | 78 | 1% | 35 | 1% | 47 | 1% | 139 | 2% | 10 | 0% | 759 | 1% |
| S - Other Services | 314 | 5% | 220 | 4% | 194 | 3% | 368 | 6% | 213 | 7% | 5,542 | 6% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 3,119 | 100% | 87,119 | 100 % |

## Table 3: Dun and Bradstreet population profile for each market (by business size)[3]

| Number of Employees | BR (N) | BR (%) | CA (N) | CA (%) | CN (N) | CN (%) | FR (N) | FR (%) | DE (N) | DE (%) |
|---|---|---|---|---|---|---|---|---|---|---|
| 10 to 49 | 2,305 | 38% | 4,497 | 75% | 2,675 | 45% | 4,369 | 73% | 3,528 | 59% |
| 50 to 249 | 2,863 | 48% | 1,213 | 20% | 2,421 | 40% | 1,311 | 22% | 1,902 | 32% |
| 250 to 499 | 415 | 7% | 138 | 2% | 397 | 7% | 170 | 3% | 256 | 4% |
| 500 to 999 | 202 | 3% | 69 | 1% | 248 | 4% | 82 | 1% | 155 | 3% |
| 1,000 to 1,999 | 120 | 2% | 38 | 1% | 165 | 3% | 38 | 1% | 89 | 1% |
| 2,000 to 4,999 | 61 | 1% | 23 | 0% | 66 | 1% | 23 | 0% | 45 | 1% |
| 5,000 and over | 34 | 1% | 22 | 0% | 28 | 0% | 7 | 0% | 25 | 0% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% |

| Number of Employees | IN (N) | IN (%) | JP (N) | JP (%) | SA (N) | SA (%) | TR (N) | TR (%) | AE (N) | AE (%) |
|---|---|---|---|---|---|---|---|---|---|---|
| 10 to 49 | 4,389 | 73% | 4,427 | 74% | 5,090 | 85% | 3,332 | 56% | 3,240 | 54% |
| 50 to 249 | 1,243 | 21% | 1,288 | 21% | 829 | 14% | 2,083 | 35% | 2,127 | 35% |
| 250 to 499 | 175 | 3% | 137 | 2% | 54 | 1% | 357 | 6% | 245 | 4% |
| 500 to 999 | 94 | 2% | 72 | 1% | 16 | 0% | 134 | 2% | 150 | 3% |
| 1,000 to 1,999 | 54 | 1% | 43 | 1% | 6 | 0% | 58 | 1% | 92 | 2% |
| 2,000 to 4,999 | 31 | 1% | 17 | 0% | 5 | 0% | 21 | 0% | 63 | 1% |
| 5,000 and over | 14 | 0% | 16 | 0% | 0 | 0% | 15 | 0% | 83 | 1% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% |

| Number of Employees | US (N) | US (%) | MX (N) | MX (%) | KR (N) | KR (%) | AU (N) | AU (%) | NG (N) | NG (%) | (N) | (%) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 10 to 49 | 3,495 | 58% | 1,640 | 27% | 4,606 | 77% | 3,990 | 67% | 1,813 | 58% | 53,396 | 61% |
| 50 to 249 | 1,849 | 31% | 2,770 | 46% | 1,160 | 19% | 1,240 | 21% | 1,000 | 32% | 25,299 | 29% |
| 250 to 499 | 287 | 5% | 740 | 12% | 119 | 2% | 221 | 4% | 147 | 5% | 3,858 | 4% |
| 500 to 999 | 171 | 3% | 385 | 6% | 66 | 1% | 163 | 3% | 73 | 2% | 2,080 | 2% |
| 1,000 to 1,999 | 89 | 1% | 239 | 4% | 34 | 1% | 115 | 2% | 40 | 1% | 1,220 | 1% |
| 2,000 to 4,999 | 54 | 1% | 134 | 2% | 13 | 0% | 139 | 2% | 30 | 1% | 725 | 1% |
| 5,000 and over | 55 | 1% | 92 | 2% | 2 | 0% | 132 | 2% | 16 | 1% | 541 | 1% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 3,119 | 100% | 87,119 | 100% |

## Table 4: Dun and Bradstreet population profile for each market (by annual turnover)[4]

| Annual Turnover | BR (N) | BR (%) | CA (N) | CA (%) | CN (N) | CN (%) | FR (N) | FR (%) | DE (N) | DE (%) |
|---|---|---|---|---|---|---|---|---|---|---|
| $2,000,000 to $10,000,000 | 4,859 | 81% | 4,323 | 72% | 4,570 | 76% | 4,089 | 68% | 4,058 | 68% |
| $10,000,000 to $50,000,000 | 902 | 15% | 1,303 | 22% | 1,033 | 17% | 1,398 | 23% | 1,305 | 22% |
| $50,000,000 to $100,000,000 | 116 | 2% | 171 | 3% | 161 | 3% | 238 | 4% | 271 | 5% |
| $100,000,000 to $500,000,000 | 102 | 2% | 158 | 3% | 184 | 3% | 228 | 4% | 295 | 5% |
| $500,000,000 to $1,000,000,000 | 15 | 0% | 18 | 0% | 25 | 0% | 24 | 0% | 33 | 1% |
| $1,000,000,000 and over | 6 | 0% | 27 | 0% | 27 | 0% | 23 | 0% | 38 | 1% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% |

[3] Percentages may not total 100 due to rounding.

[4] Percentages may not total 100 due to rounding.

| Annual Turnover | IN (N) | IN (%) | JP (N) | JP (%) | SA (N) | SA (%) | TR (N) | TR (%) | AE (N) | AE (%) |
|---|---|---|---|---|---|---|---|---|---|---|
| $2,000,000 to $10,000,000 | 5,174 | 86% | 4,331 | 72% | 5,676 | 95% | 4,067 | 68% | 4,132 | 69% |
| $10,000,000 to $50,000,000 | 660 | 11% | 1,213 | 20% | 301 | 5% | 1,599 | 27% | 1,199 | 20% |
| $50,000,000 to $100,000,000 | 78 | 1% | 199 | 3% | 14 | 0% | 185 | 3% | 264 | 4% |
| $100,000,000 to $500,000,000 | 68 | 1% | 190 | 3% | 8 | 0% | 124 | 2% | 271 | 5% |
| $500,000,000 to $1,000,000,000 | 10 | 0% | 34 | 1% | 0 | 0% | 14 | 0% | 57 | 1% |
| $1,000,000,000 and over | 10 | 0% | 33 | 1% | 1 | 0% | 11 | 0% | 77 | 1% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% |

| Annual Turnover | US (N) | US (%) | MX (N) | MX (%) | KR (N) | KR (%) | AU (N) | AU (%) | NG (N) | NG (%) | (N) | (%) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| $2,000,000 to $10,000,000 | 3,986 | 66% | 3,653 | 61% | 4,297 | 72% | 4,108 | 68% | 2,281 | 73% | 63,604 | 73% |
| $10,000,000 to $50,000,000 | 1,456 | 24% | 1,624 | 27% | 1,352 | 23% | 949 | 16% | 574 | 18% | 16,868 | 19% |
| $50,000,000 to $100,000,000 | 234 | 4% | 304 | 5% | 171 | 3% | 212 | 4% | 95 | 3% | 2,713 | 3% |
| $100,000,000 to $500,000,000 | 232 | 4% | 318 | 5% | 146 | 2% | 374 | 6% | 105 | 3% | 2,803 | 3% |
| $500,000,000 to $1,000,000,000 | 43 | 1% | 50 | 1% | 19 | 0% | 122 | 2% | 31 | 1% | 495 | 1% |
| $1,000,000,000 and over | 49 | 1% | 51 | 1% | 15 | 0% | 235 | 4% | 33 | 1% | 636 | 1% |
| TOTAL | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 6,000 | 100% | 3,119 | 100% | 87,119 | 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 5), business size (Table 6), and annual turnover (Table 7), followed by definitions of each of the conversion stages. Further information on final sample outcomes can be seen in Table 13.

### Table 5: Dun and Bradstreet population profile conversion rates (by sector)

| Conversion Stage | TOTAL | Construction | Manufacturing | Other | Professional Services | Wholesale |
|---|---|---|---|---|---|---|
| Sample purchased | 87,119 | 8,609 | 20,796 | 21,173 | 13,434 | 23,107 |
| Unused sample | 4,321 | 134 | 982 | 1123 | 850 | 1232 |
| Sent to number lookup | 82,798 | 8,475 | 19,814 | 20,050 | 12,584 | 21,875 |
| Successful lookup | 82,798 | 8,475 | 19,814 | 20,050 | 12,584 | 21,875 |
| Loaded to CATI | 82,798 | 8,475 | 19,814 | 20,050 | 12,584 | 21,875 |
| Total number of started surveys | 39,673 | 3,862 | 12,582 | 5,675 | 3,986 | 13,568 |
| Screened interviews | 4,254 | 462 | 1205 | 856 | 786 | 945 |
| Partially completed interviews | 492 | 38 | 162 | 92 | 112 | 88 |
| Total completed interviews | 3,762 | 424 | 1043 | 764 | 674 | 857 |

## Table 6: Dun and Bradstreet population profile conversion rates (by business size)

| Conversion Stage | TOTAL | 10 to 49 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 | 87,119 | 53,396 | 25,299 | 3,858 | 2,080 | 1220 | 725 | 541 |
| Unused sample | 4,321 | 3737 | 493 | 79 | 9 | 2 | 1 | 0 |
| Sent to number lookup | 82,798 | 49,659 | 24,806 | 3,779 | 2,071 | 1,218 | 724 | 541 |
| Successful lookup | 82,798 | 49,659 | 24,806 | 3,779 | 2,071 | 1,218 | 724 | 541 |
| Loaded to CATI | 82,798 | 49,659 | 24,806 | 3,779 | 2,071 | 1,218 | 724 | 541 |
| Total number of started surveys | 39,673 | 22,635 | 10,948 | 2,753 | 1,625 | 841 | 442 | 429 |
| Screened interviews | 4,254 | 1676 | 1165 | 513 | 362 | 215 | 161 | 162 |
| Partially completed interviews | 492 | 238 | 153 | 38 | 33 | 12 | 8 | 10 |
| Total completed interviews | 3,762 | 1438 | 1012 | 475 | 329 | 203 | 153 | 152 |

## Table 7: Dun and Bradstreet population profile conversion rates (by annual turnover)

| Conversion Stage | 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 | 87,119 | 63604 | 16868 | 2713 | 2803 | 495 | 636 |
| Unused sample | 4,321 | 3762 | 521 | 19 | 14 | 4 | 1 |
| Sent to number lookup | 82,798 | 59,842 | 16,347 | 2,694 | 2,789 | 491 | 635 |
| Successful lookup | 82,798 | 59,842 | 16,347 | 2,694 | 2,789 | 491 | 635 |
| Loaded to CATI | 82,798 | 59,842 | 16,347 | 2,694 | 2,789 | 491 | 635 |
| Total number of started surveys | 39,673 | 25,368 | 9,731 | 1,982 | 1,729 | 421 | 442 |
| Screened interviews | 4,254 | 1645 | 1290 | 552 | 426 | 163 | 178 |
| Partially completed interviews | 492 | 224 | 161 | 57 | 17 | 7 | 26 |
| Total completed interviews | 3,762 | 1421 | 1129 | 495 | 409 | 156 | 152 |

**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 82,798 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.

### 1.2.5. 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 2022. Overall, there was no consistent pattern in the differences between population counts between 2018 to 2019, 2019 to 2020, 2020 to 2021, and 2021 to 2022. For example, some sectors saw a significant reduction of businesses from 2020 to 2021 but saw a significant increase in the same sector moving into 2022. This pattern was not consistent across sectors within the same market or among other markets. Notably, the degree of the fluctuation amongst sector counts across markets was generally larger in 2022 compared to 2021, although similar previous waves, as shown in table 8.

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 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 purge 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, 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 8 below includes the percentage change in population counts year-on-year.

**Table 8: Population counts – percentage shift in counts year on year**

| Sector | FR 2018 to 2019 | FR 2019 to 2020 | FR 2020 to 2021 | FR 2021 to 2022 | CN 2018 to 2019 | CN 2019 to 2020 | CN 2020 to 2021 | CN 2021 to 2022 | JP 2018 to 2019 | JP 2019 to 2020 | JP 2020 to 2021 | JP 2021 to 2022 | DE 2018 to 2019 | DE 2019 to 2020 | DE 2020 to 2021 | DE 2021 to 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Manufacturing | -34% | 46% | 0% | -2% | 318 % | 45% | 19% | 47% | -47% | 67% | -2% | -43% | 12% | -12% | 7% | -13% |
| Construction | -27% | 43% | 3% | -3% | 770 % | 3% | 118 % | 85% | -39% | 67% | 2% | -23% | 38% | -11% | 9% | -19% |

| Sector | FR 2018 to 2019 | FR 2019 to 2020 | FR 2020 to 2021 | FR 2021 to 2022 | CN 2018 to 2019 | CN 2019 to 2020 | CN 2020 to 2021 | CN 2021 to 2022 | JP 2018 to 2019 | JP 2019 to 2020 | JP 2020 to 2021 | JP 2021 to 2022 | DE 2018 to 2019 | DE 2019 to 2020 | DE 2020 to 2021 | DE 2021 to 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Wholesale, Retail and Motor Repair | -34% | 44% | 7% | -6% | 193 % | 49% | 91% | 57% | -24% | 63% | -2% | -34% | 33% | -26% | 8% | -20% |
| Professional services | 10% | -26% | 8% | -5% | 187 % | 42% | 106 % | 29% | 31% | -60% | 1% | -20% | 25% | -35% | 8% | -14% |
| Other services | -14% | 180 % | -1% | -15% | 293 % | 171 % | 48% | 42% | -22% | 401 % | 0% | -18% | 154 % | 16% | 7% | -20% |
| TOTAL | -21% | 42% | 3% | -8% | 296 % | 50% | 54% | 50% | -19% | 62% | 0% | -26% | 38% | -15% | 8% | -17% |

| Sector | IN 2018 to 2019 | IN 2019 to 2020 | IN 2020 to 2021 | IN 2021 to 2022 | AE 2018 to 2019 | AE 2019 to 2020 | AE 2020 to 2021 | AE 2021 to 2022 | US 2018 to 2019 | US 2019 to 2020 | US 2020 to 2021 | US 2021 to 2022 | BR 2018 to 2019 | BR 2019 to 2020 | BR 2020 to 2021 | BR 2021 to 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Manufacturing | 857 % | 4% | 15% | 46% | 689 % | 6% | 43% | -34% | 193 % | -68% | -3% | 0% | - | 44% | -1% | 21% |
| Construction | 9,770 % | -5% | 7% | 28% | 888 % | 38% | 52% | -46% | 228 % | -70% | -4% | 0% | - | 103 % | -1% | 55% |
| Wholesale, Retail and Motor Repair | 6,204 % | 30% | 124 % | -1% | 531 % | -5% | 180% | -33% | 296 % | -75% | -4% | -1% | - | 50% | -1% | 8% |
| Professional services | 4,474 % | -36% | 4% | 35% | 674 % | -52% | 40% | -28% | 122 % | -75% | -6% | 1% | - | 24% | 3% | 51% |
| Other services | 3,858 % | 39% | 14% | 38% | 1,334 % | 89% | 72% | -45% | 357 % | -49% | -6% | 0% | - | 209 % | 1% | 65% |
| TOTAL | 3,234 % | 4% | 57% | 15% | 683 % | 7% | 100% | -37% | 215 % | -69% | -5% | 0% | - | 60% | 0% | 25% |

| Sector | ZA 2018 to 2019 | ZA 2019 to 2020 | ZA 2020 to 2021 | ZA 2021 to 2022 | TR 2018 to 2019 | TR 2019 to 2020 | TR 2020 to 2021 | TR 2021 to 2022 | CA 2018 to 2019 | CA 2019 to 2020 | CA 2020 to 2021 | CA 2021 to 2022 | KR 2018 to 2019 | KR 2019 to 2020 | KR 2020 to 2021 | KR 2021 to 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Manufacturing | - | 32% | 19% | 261 % | - | -2% | 0% | -18% | - | - | 1% | 0% | - | - | - | 29% |
| Construction | - | 8% | 9% | 974 % | - | -7% | -2% | -15% | - | - | 1% | 2% | - | - | - | 53% |
| Wholesale, Retail and Motor Repair | - | 16% | 37% | 161 % | - | -20% | 0% | -15% | - | - | 1% | 2% | - | - | - | 19% |
| Professional services | - | -22% | 155 % | 85% | - | -29% | 3% | -19% | - | - | 3% | 2% | - | - | - | 9% |
| Other services | - | 68% | 51% | 648 % | - | 24% | 0% | -15% | - | - | 1% | 3% | - | - | - | -7% |
| TOTAL | - | 8% | 75% | 306 % | - | -8% | 0% | -16% | - | - | 2% | 2% | - | - | - | 20% |

| Sector | MX 2018 to 2019 | MX 2019 to 2020 | MX 2020 to 2021 | MX 2021 to 2022 | AU 2018 to 2019 | AU 2019 to 2020 | AU 2020 to 2021 | AU 2021 to 2022 |
|---|---|---|---|---|---|---|---|---|
| Manufacturing | - | - | - | 9% | - | - | - | -8% |

| Sector | MX 2018 to 2019 | MX 2019 to 2020 | MX 2020 to 2021 | MX 2021 to 2022 | AU 2018 to 2019 | AU 2019 to 2020 | AU 2020 to 2021 | AU 2021 to 2022 |
|---|---|---|---|---|---|---|---|---|
| Construction | - | - | - | 7% | - | - | - | 5% |
| Wholesale, Retail and Motor Repair | - | - | - | 30% | - | - | - | -10% |
| Professional services | - | - | - | 19% | - | - | - | -6% |
| Other services | - | - | - | 26% | - | - | - | -26% |
| TOTAL | - | - | - | 20% | - | - | - | -14% |

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

## 1.3. Questionnaire design

The questionnaire was developed in collaboration with DBT and was based on the 2021 ITIS (now known as 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 9 below shows the proportion of languages used across interviews in each market. Interviewers were briefed by our fieldwork partners 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 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 | 90% | 10% | - | - | - | - | - | - | - | - | - |
| S. AFRICA | 100% | - | - | - | - | - | - | - | - | - | - |
| CANADA | 96% | - | - | - | - | - | - | - | 4% | - | - |
| FRANCE | 3% | - | 97% | - | - | - | - | - | - | - | - |
| GERMANY | 9% | - | - | 91% | - | - | - | - | - | - | - |
| CHINA | - | - | - | - | 100% | - | - | - | - | - | - |
| JAPAN | - | - | - | - | - | 100% | - | - | - | - | - |
| BRAZIL | - | - | - | - | - | - | 100% | - | - | - | - |
| TURKEY | - | - | - | - | - | - | - | 100% | - | - | - |
| MEXICO | | - | - | - | - | - | - | - | - | 100% | - |

| COUNTRY | English | Arabic | French | German | Mandarin | Japanese | Portuguese | Turkish | Canadian French | Spanish | Korean |
|---|---|---|---|---|---|---|---|---|---|---|---|
| S. KOREA | | - | - | - | - | - | - | - | - | - | 100% |
| AUSTRALIA | 100% | - | - | - | - | - | - | - | - | - | - |
| NIGERIA | 100% | - | - | - | - | - | - | - | - | - | - |

The average interview length was 23 mins. The minimum length was 17 mins and maximum length was 38 minutes. Table 10 below outlines the questionnaire length by market.

**Table 10: Questionnaire length**

| | Overall | France | Germany | USA | South Africa | India |
|---|---|---|---|---|---|---|
| Average length (minutes) | 23 | 26 | 26 | 21 | 22 | 21 |

| | Japan | China | Brazil | UAE | Turkey | Canada |
|---|---|---|---|---|---|---|
| Average length (minutes) | 24 | 26 | 25 | 21 | 24 | 21 |

| | Mexico | South Korea | Australia | Nigeria |
|---|---|---|---|---|
| Average length (minutes) | 25 | 25 | 21 | 23 |

### 1.3.1. 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 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.

### 1.3.2. 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 2022. 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 11a: Rounding of screening criteria – equivalent to $2,000,000 (2022)**

| 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 11a: Rounding of screening criteria – equivalent to over $2,000,000 (2022)**

| 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 2022 data. Please note that these conversions were based on the conversion rates from the XE currency converter on 07/10/2022. The exchange rates were as follows:

**Table 12: Currency conversion rates (as of 7 October 2022)**

| Currency | China (CNY) | Japan (JPY) | France/ Germany (EUR) | UAE (AED) | India (INR) | Brazil (BRL) |
|---|---|---|---|---|---|---|
| Units per USD | 7.11300 | 144.855 | 1.02038 | 3.67250 | 82.3453 | 5.22355 |

| Currency | South Africa (ZAR) | Turkey (TRY) | Mexico (MXN) | South Korea (KRW) | Canada (CAD) | Australia (AUD) |
|---|---|---|---|---|---|---|
| Units per USD | 17.9758 | 18.5843 | 20.0512 | 1,412.19 | 1.37188 | 1.55807 |

| Currency | Nigeria (NGN) | UK (GBP) |
|---|---|---|
| Units per USD | 433.377 | 0.892103 |

### 1.3.3. 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 Global Trade campaign, relevant to their classification.

In total, 2,407 respondents (64%) were able to view the material online. In contrast, 1,355 respondents (36%) were read descriptions[5] 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.

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

**Figure 1: Sample Images shown to survey respondents who could access the online web page**




Figure 1 shows 5 examples of GREAT campaign advertisements with taglines including ‘Great Opportunities are opening up’, ‘Great Businesses are secure businesses’, ‘Great Trade steers its own course’, ‘Great investments are creating a sustainable future’.

## 1.4. 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 partners[6] was used in all countries. The survey scripting was also carried out by our fieldwork partners 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

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

unable to participate at the point of first contact, follow-up appointments were booked as necessary. The overall fieldwork outcomes are summarised in table 13 below.

**Table 13: Sample outcomes**

| Conversion Stage | TOTAL | FR | DE | US | ZA | IN | JP | CN | BR | UAE | TR | CA | MX | KR | AU | NG |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Completed Interviews | 3,762 | 250 | 250 | 251 | 250 | 255 | 250 | 250 | 250 | 254 | 250 | 250 | 251 | 250 | 251 | 250 |
| Sample Called | 82,798 | 5786 | 5870 | 5386 | 5587 | 5209 | 5921 | 5898 | 5801 | 5487 | 5760 | 5705 | 5822 | 5908 | 5675 | 2983 |
| Soft Appointments | 1,604 | 107 | 113 | 144 | 32 | 77 | 91 | 102 | 85 | 209 | 280 | 68 | 112 | 89 | 67 | 28 |
| Hard Appointments | 374 | 22 | 28 | 12 | 18 | 26 | 38 | 43 | 18 | 26 | 31 | 29 | 38 | 13 | 9 | 23 |
| Maximum call attempts | 13,547 | 872 | 679 | 585 | 1092 | 1408 | 1092 | 973 | 1022 | 1119 | 872 | 709 | 899 | 975 | 708 | 542 |
| Screen outs (That is, ineligible) | 10,950 | 793 | 672 | 671 | 688 | 720 | 706 | 741 | 858 | 747 | 674 | 767 | 660 | 673 | 738 | 842 |
| Refusals | 24,104 | 2319 | 1986 | 2500 | 1576 | 1087 | 2007 | 1890 | 1497 | 769 | 988 | 1652 | 1677 | 1881 | 1793 | 482 |
| Unused | 4,321 | 214 | 130 | 614 | 413 | 791 | 79 | 102 | 199 | 513 | 240 | 295 | 178 | 92 | 325 | 136 |
| Eligibility rate | 26% | 24% | 27% | 27% | 27% | 26% | 26% | 25% | 23% | 25% | 27% | 25% | 28% | 27% | 25% | 23% |
| Co-operation rate | 39% | 32% | 34% | 28% | 40% | 48% | 32% | 34% | 41% | 56% | 50% | 37% | 38% | 37% | 36% | 69% |

**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.

### 1.4.1. Screening and Eligibility

The proportion of business who were eligible to take part in the study in 2022 remained in line with eligibility in 2021. Tables 14 to 16 showing screened, screen-out counts, and eligibility comparisons between 2019, 2020, 2021 and 2022 are included below. For the purpose of comparison, the tables below include all markets, except Canada, Mexico, South Korea, Australia, and Nigeria (10 consistent markets).

**Table 14: Screened**

| Screened | Wave 2 (2019) | Wave 3 (2020) | Wave 4 (2021) | Wave 5 (2022) |
|---|---|---|---|---|
| Manufacturing | 3,846 | 3,134 | 4,149 | 3,449 |
| Construction | 937 | 893 | 1,300 | 1,699 |
| Wholesale, Retail and Motor Repair | 4,308 | 2,641 | 3,777 | 3,152 |
| Professional services | 2,516 | 1,748 | 2,269 | 2,285 |
| Other services | 2,197 | 1,528 | 2,766 | 2,502 |

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 is not available for comparison. 2018 sector profile information is unavailable.

**Table 15: Screen-outs**

| Screen-outs | Wave 2 (2019) | Wave 3 (2020) | Wave 4 (2021) | Wave 5 (2022) |
|---|---|---|---|---|
| Manufacturing | 2,853 | 2,182 | 3,074 | 2,457 |
| Construction | 839 | 714 | 1,024 | 1,292 |
| Wholesale, Retail and Motor Repair | 3,438 | 1,908 | 2,957 | 2,340 |
| Professional services | 2,202 | 1,271 | 1,638 | 1,663 |
| Other services | 1,969 | 1,097 | 2,040 | 1,823 |

N.B. Screen-outs are all of the screened businesses who also said that they had not previously, or were not likely to, buy and/or invest internationally in the future; 2018 screening data not available for comparison 2018 sector profile information unavailable.

**Table 16: Eligibility rate**

| Eligibility | Wave 2 (2019) | Wave 2 (2019) | Wave 3 (2020) | Wave 3 (2020) | Wave 4 (2021) | Wave 4 (2021) | Wave 5 (2022) | Wave 5 (2022) |
|---|---|---|---|---|---|---|---|---|
| Total Sample Loaded | 151,662 | 151,662 | 66,000 | 66,000 | 84,000 | 84,000 | 87,119 | 87,119 |
| Manufacturing | 992 | 0.7% | 952 | 1.4% | 1,075 | 1.3% | 992 | 1.1% |
| Construction | 98 | 0.1% | 179 | 0.3% | 276 | 0.3% | 407 | 0.5% |
| Wholesale, Retail and Motor Repair | 870 | 0.6% | 733 | 1.1% | 820 | 1.0% | 812 | 0.9% |
| Professional services | 314 | 0.2% | 477 | 0.7% | 631 | 0.8% | 622 | 0.7% |
| Other services | 228 | 0.2% | 431 | 0.7% | 726 | 0.9% | 679 | 0.8% |

Eligibility rate is 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). 2018 sector profile information is unavailable.

## 1.5. 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 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 (*that is, information and communication; finance, insurance and real estate; professional, scientific and technical; admin and support; education, health and social work)*
- other *(that is, 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 17: Weighted (w) and unweighted (u) sample profiles[7]**

| | | | TOTAL | Manufacturing | Construction | Wholesale, retail, motor repair | Professional services | Other |
|---|---|---|---|---|---|---|---|---|
| FR | w | N | 250 | 91 | 31 | 39 | 37 | 53 |
| FR | w | % | 100% | 36% | 12% | 16% | 15% | 21% |
| FR | u | N | 250 | 70 | 31 | 52 | 41 | 56 |
| FR | u | % | 100% | 28% | 12% | 21% | 16% | 22% |
| DE | w | N | 250 | 94 | 33 | 35 | 65 | 24 |
| DE | w | % | 100% | 37% | 13% | 14% | 26% | 10% |
| DE | u | N | 250 | 82 | 20 | 45 | 62 | 41 |
| DE | u | % | 100% | 33% | 8% | 18% | 25% | 16% |
| US | w | N | 251 | 75 | 45 | 60 | 40 | 31 |
| US | w | % | 100% | 30% | 18% | 24% | 16% | 12% |
| US | u | N | 251 | 63 | 28 | 67 | 49 | 44 |
| US | u | % | 100% | 25% | 11% | 27% | 20% | 18% |
| ZA | w | N | 250 | 108 | 12 | 46 | 47 | 36 |

[7] Percentages may not total 100 due to rounding.

| | | | TOTAL | Manufacturing | Construction | Wholesale, retail, motor repair | Professional services | Other |
|---|---|---|---|---|---|---|---|---|
| ZA | w | % | 100% | 43% | 5% | 19% | 19% | 15% |
| ZA | u | N | 250 | 51 | 24 | 38 | 59 | 78 |
| ZA | u | % | 100% | 20% | 10% | 15% | 24% | 31% |
| IN | w | N | 255 | 104 | 15 | 23 | 53 | 59 |
| IN | w | % | 100% | 41% | 6% | 9% | 21% | 23% |
| IN | u | N | 255 | 66 | 20 | 57 | 54 | 58 |
| IN | u | % | 100% | 26% | 8% | 22% | 21% | 23% |
| JP | w | N | 250 | 120 | 29 | 59 | 24 | 18 |
| JP | w | % | 100% | 48% | 12% | 24% | 10% | 7% |
| JP | u | N | 250 | 84 | 36 | 56 | 24 | 50 |
| JP | u | % | 100% | 34% | 14% | 22% | 10% | 20% |
| CN | w | N | 250 | 82 | 10 | 63 | 70 | 25 |
| CN | w | % | 100% | 33% | 4% | 25% | 28% | 10% |
| CN | u | N | 250 | 91 | 20 | 60 | 51 | 28 |
| CN | u | % | 100% | 36% | 8% | 24% | 20% | 11% |
| BR | w | N | 250 | 60 | 29 | 54 | 78 | 28 |
| BR | w | % | 100% | 24% | 12% | 21% | 31% | 11% |
| BR | u | N | 250 | 57 | 21 | 79 | 44 | 49 |
| BR | u | % | 100% | 23% | 8% | 32% | 18% | 20% |
| AE | w | N | 254 | 90 | 50 | 23 | 39 | 53 |
| AE | w | % | 100% | 36% | 20% | 9% | 15% | 21% |
| AE | u | N | 254 | 61 | 34 | 54 | 29 | 76 |
| AE | u | % | 100% | 24% | 13% | 21% | 11% | 30% |
| TR | w | N | 250 | 58 | 50 | 35 | 62 | 45 |
| TR | w | % | 100% | 23% | 20% | 14% | 25% | 18% |
| TR | u | N | 250 | 88 | 32 | 62 | 27 | 41 |
| TR | u | % | 100% | 35% | 13% | 25% | 11% | 16% |
| CA | w | N | 250 | 108 | 27 | 60 | 30 | 25 |
| CA | w | % | 100% | 43% | 11% | 24% | 12% | 10% |
| CA | u | N | 250 | 60 | 31 | 71 | 40 | 48 |
| CA | u | % | 100% | 24% | 12% | 28% | 16% | 19% |
| MX | w | N | 251 | 69 | 44 | 36 | 58 | 43 |
| MX | w | % | 100% | 28% | 18% | 15% | 23% | 17% |
| MX | u | N | 251 | 71 | 33 | 48 | 47 | 52 |
| MX | u | % | 100% | 28% | 13% | 19% | 19% | 21% |
| KR | w | N | 250 | 48 | 53 | 55 | 73 | 22 |
| KR | w | % | 100% | 19% | 21% | 22% | 29% | 9% |
| KR | u | N | 250 | 79 | 39 | 52 | 52 | 28 |
| KR | u | % | 100% | 32% | 16% | 21% | 21% | 11% |
| AU | w | N | 251 | 85 | 40 | 83 | 30 | 13 |

| | | | TOTAL | Manufacturing | Construction | Wholesale, retail, motor repair | Professional services | Other |
|---|---|---|---|---|---|---|---|---|
| AU | w | % | 100% | 34% | 16% | 33% | 12% | 5% |
| AU | u | N | 251 | 69 | 38 | 71 | 43 | 30 |
| AU | u | % | 100% | 27% | 15% | 28% | 17% | 12% |
| NG | w | N | 250 | 65 | 23 | 42 | 42 | 79 |
| NG | w | % | 100% | 26% | 9% | 17% | 17% | 31% |
| NG | u | N | 250 | 51 | 17 | 45 | 52 | 85 |
| NG | u | % | 100% | 20% | 7% | 18% | 21% | 34% |

## 1.6. 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.[8] The impact of weighting for each market is shown in table 18, along with the required ranges for different sample sizes and percentages associated 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 3,762 gives a particular answer, the chances are 95 in 100 that the 'true' value will fall within the range of +/- 1.0 percentage points from the sample results.

### Table 18: Effective base sizes

| Market | TOTAL (unweighted) | Effective base | 10% or 90% | 20% or 80% | 30% or 70% | 40% or 60% | 50% |
|---|---|---|---|---|---|---|---|
| TOTAL | 3,762 | 3,295 | ±1.0 | ±1.4 | ±1.6 | ±1.7 | ±1.7 |
| USA | 251 | 233 | ±3.9 | ±5.1 | ±5.9 | ±6.3 | ±6.4 |
| France | 250 | 240 | ±3.8 | ±5.1 | ±5.8 | ±6.2 | ±6.3 |
| Germany | 250 | 232 | ±3.9 | ±5.1 | ±5.9 | ±6.3 | ±6.4 |
| China | 250 | 238 | ±3.8 | ±5.1 | ±5.8 | ±6.2 | ±6.3 |
| Japan | 250 | 218 | ±4.0 | ±5.3 | ±6.1 | ±6.5 | ±6.6 |
| UAE | 254 | 213 | ±4.0 | ±5.4 | ±6.1 | ±6.6 | ±6.7 |
| India | 255 | 217 | ±4.0 | ±5.3 | ±6.1 | ±6.5 | ±6.6 |
| Brazil | 250 | 210 | ±4.1 | ±5.4 | ±6.2 | ±6.6 | ±6.8 |
| South Africa | 250 | 180 | ±4.4 | ±5.8 | ±6.7 | ±7.2 | ±7.3 |
| Turkey | 250 | 190 | ±4.3 | ±5.7 | ±6.5 | ±7.0 | ±7.1 |

[8] 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.

| Market | TOTAL (unweighted) | Effective base | 10% or 90% | 20% or 80% | 30% or 70% | 40% or 60% | 50% |
|---|---|---|---|---|---|---|---|
| Canada | 250 | 206 | ±4.1 | ±5.5 | ±6.3 | ±6.7 | ±6.8 |
| Mexico | 251 | 241 | ±3.8 | ±5.0 | ±5.8 | ±6.2 | ±6.3 |
| South Korea | 250 | 226 | ±3.9 | ±5.2 | ±6.0 | ±6.4 | ±6.5 |
| Australia | 251 | 233 | ±3.9 | ±5.1 | ±5.9 | ±6.3 | ±6.4 |
| Nigeria | 250 | 242 | ±3.8 | ±5.0 | ±5.8 | ±6.2 | ±6.3 |

## 1.7. 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 2022 data to understand differences in responses. No additional analytical processes were applied.

## 1.8. 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.

### 1.8.1. Business size

Sub-group analysis was based on business turnover and size. Table 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 $2m and at least 10 employees.

**Table 19: Breakdown of respondents by size and turnover (unweighted)[9]**

| Annual turnover (USD $) | N | % | Number of employees | N | % |
|---|---|---|---|---|---|
| $2,000,000 to $10,000,000 | 1,421 | 38% | 10 to 49 | 1,438 | 38% |

[9] Percentages may not total 100 due to rounding.

| Annual turnover (USD $) | N | % | Number of employees | N | % |
|---|---|---|---|---|---|
| $10,000,000 to $50,000,000 | 1,129 | 30% | 50 to 249 | 1,012 | 27% |
| $50,000,000 to $100,000,000 | 495 | 13% | 250 to 499 | 475 | 13% |
| $100,000,000 to $500,000,000 | 409 | 11% | 500 to 999 | 329 | 9% |
| $500,000,000 to $1,000,000,000 | 156 | 4% | 1,000 to 1,999 | 203 | 5% |
| $1,000,000,000 and over | 152 | 4% | 2,000 to 4,999 | 153 | 4% |
| TOTAL | 3,762 | 100% | 5,000 and over | 152 | 4% |
| | | | TOTAL | 3,762 | 100% |

### 1.8.2. Sector

Table 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 20: Breakdown of respondents by sector (unweighted)[10]**

| Sector | N | % |
|---|---|---|
| A - Agriculture, Forestry, Fishing | 48 | 1% |
| B - Mining, Quarrying | 53 | 1% |
| C - Manufacturing | 1043 | 28% |
| D - Electricity, Gas, Steam and Aircon | 52 | 1% |
| E - Water, Sewerage, Waste | 9 | <1% |
| F - Construction | 424 | 11% |
| G - Wholesale, Retail, Motor Repair | 857 | 23% |
| H - Transport/ Storage | 128 | 3% |
| I - Accommodation/ Food Service | 63 | 2% |
| J - Information and Communication | 147 | 4% |
| K - Finance and Insurance | 203 | 5% |
| L - Real Estate | 50 | 1% |
| M - Professional, Scientific, Technical | 250 | 7% |
| N - Admin and Support | 24 | 1% |
| P - Education | 51 | 1% |

[10] Percentages may not total 100 due to rounding.

| Sector | N | % |
|---|---|---|
| Q - Health and Social Work | 93 | 2% |
| R - Arts/ Entertainment/ Recreation | 30 | 1% |
| S - Other Services | 237 | 6% |
| TOTAL | 3,762 | 100% |

### 1.8.3. 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: 15 market totals and 10 market totals. The trended 10 market totals represent the aggregated data of markets that were consistently present in the 2019, 2020, 2021, and 2022 surveys, respectively. That is to say, all markets are included in the aggregated scores except Canada, Mexico, South Korea, Australia, and Nigeria. In contrast, the 15 market aggregated results include all markets surveyed in 2022 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 10 or 15 markets.

In most research studies, there will be an element of cultural bias[11] 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.

### 1.8.4. 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 2 shows, around three quarters of respondents were both. There were significantly more businesses that were currently only buying/would only consider buying (12%) compared to those that were currently only investing/would only consider investing (7%).

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

Within the overall sample for the 10 consistent markets in 2022, 1,262 respondents were classified as 'buyers' and asked questions relating to buying, whilst 1,248 were classified as 'investors' and were asked questions relating to investment. For the overall 15 markets in 2022, the sample size for 'buyers' increased to 1,901 respondents, and for 'investors', this increased to 1,861.

**Figure 2: Breakdown of respondents by international trading and investment activities – 10-market total**

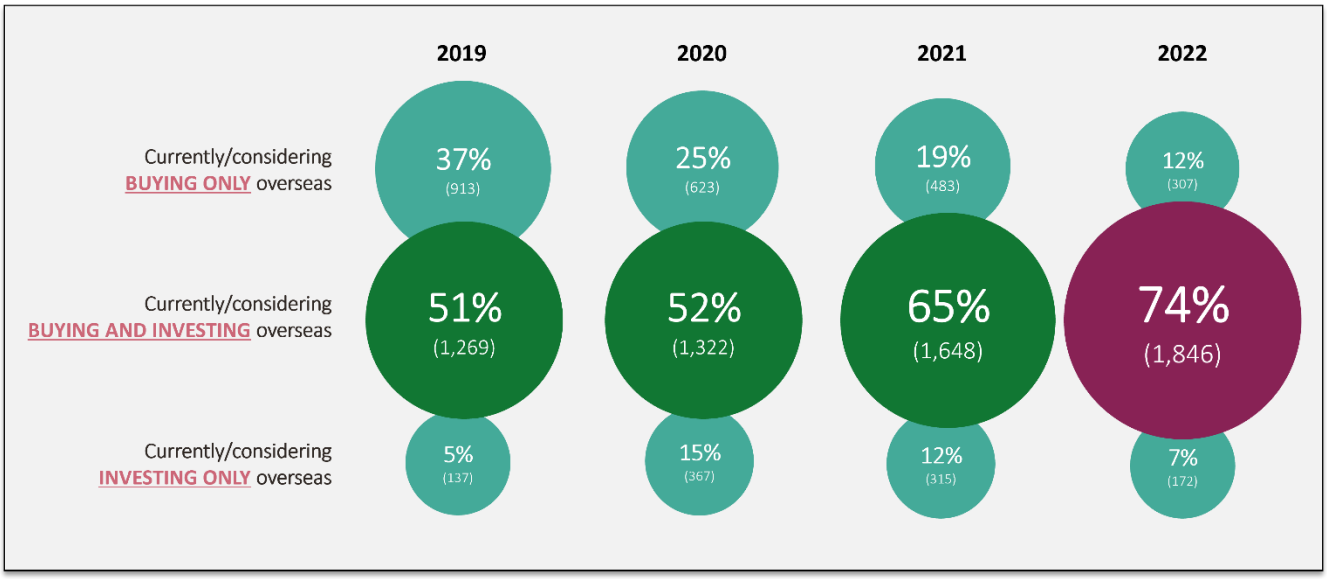



Figure 2 shows the proportion of businesses that are currently or considering buying ONLY overseas, businesses that are currently or considering investing ONLY overseas, and businesses that are currently or considering buying AND investing overseas. Figures from 2019 to 2022 are shown.

### 1.8.5. 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. Around 2 thirds of all respondents accessed the internet to view campaign stimuli in 2022, 2021 and 2020 (64%, 65% and 67% respectively), compared to the 44% who accessed the internet 2019 amongst the 10 consistent markets. Those without internet access were given a detailed description[12] of the promotional activity.

[12] Can you recall having seen, read or heard any advertising, events or promotion which states 'We are the UK and we are ready to trade with you', or which includes phrases using the word GREAT to promote 'Great Britain' as a place to do business with? This might have included the phrases 'Innovation is GREAT', 'Creativity is GREAT' or 'Invest in GREAT'. 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.

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.

## 1.9. 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

## 1.10. 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.

# 2. Background Quality Report

## 2.1. Data quality of data sources

Telephone fieldwork for this study was conducted and managed by our fieldwork partners. All fieldwork was conducted by our fieldwork partners 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 partners' 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 partners' 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.

## 2.2. 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 2022 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 partners 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 partners quality assurances department.

Once our fieldwork partners 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 partners 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 – this 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 2 agreed milestones during fieldwork, to enable data checking and the feedback of amendments/additions/deletions /re-ordering etc. 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.

# 3. Appendix

## 3.1. Questionnaire

**2022 DIT International Buyers and Investors Study**

**GATEKEEPER INTRODUCTION**

**I1 Good morning/afternoon. I am calling from our fieldwork partners 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 International Trade (DIT). The aim of the study is to research views of companies in your country about the United Kingdom.**

INT: STRESS AS NECESSARY

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

**I1A 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

| ANSWER | OUTCOME |
|---|---|
| Yes – doing something potentially unsafe (SET CALLBACK) | TAKE DOWN DETAILS FOR CALLBACK |
| No – safe to continue with survey | CONTINUE TO I2 |

**I2 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 NEEDED: **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

| ANSWER | OUTCOME |
|---|---|
| Named person speaking | GO TO I3 |
| Transferred | GO TO I3 |
| Not currently available (INT: COLLECT NAME) | MAKE APPOINTMENT |
| Nobody with responsibility at this site (INT: ASK FOR TRANSFER) | NEW CALL |
| Refused | THANK AND CLOSE |
| No one is responsible for these activities | THANK AND CLOSE |

PRO: ASK ALL ELIGIBLE

**I3 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 International Trade (DIT) about businesses' perceptions of international trade and foreign investment. It will take about 25 minutes.**

**NEW SCREEN:**

**I4 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

| ANSWER | OUTCOME |
|---|---|
| Yes / Maybe | GO TO S0 |
| No (INT:COLLECT NAME & NUMBER AND ASK FOR TRANSFER) | NEW CALL |
| Refused | THANK AND CLOSE |

---

**NEW SCREEN:**

**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.**

PROG: TIMESTAMP 1

**SECTION A: SCREENERS AND CLASSIFICATIONS**

PROG: ASK ALL
**S0 Is your organisation . . .** ? READ OUT
PROG/INT: SINGLE CODE ONLY

1. A profit-making organisation
2. A non-profit making organisation or charity

IF CODE 2 CLOSE INTERVIEW. ELSE CONTINUE

PROG: ASK ALL
**S1a. Does your organisation currently buy or import products or services from companies based**

**abroad?**

1. Yes, currently buys/imports
2. No

PROG: ASK ALL WHO SAY 'NO' AT S1a
**S1b. Are you considering buying or importing products or services from companies based abroad in the future?**

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

PROG: ASK ALL WHO SAY 'YES' AT S1a: IF 'NO' AT S1a AUTOFILL CODE 2 ('NO') AT S1c AND SKIP TO S1d
**S1c. Does your organisation currently buy or import products or services from companies based <u>in the United Kingdom (that is England, Scotland, Wales and Northern Ireland)</u>?**

1. Yes, currently buys/imports <u>from UK</u>
2. No

PROG: ASK ALL – IF 'YES' AT S1c AUTOFILL CODE 1 ('YES')
**S1d. <u>Have you</u> bought or imported products or services from companies based in the United Kingdom <u>within the last five years?</u>**
PROG/INT: SINGLE CODE ONLY

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

**G: DUMMY VARIABLE FOR R**ADE: S1 = (1 OR 2) OR S1a = (1 OR 2)
PROG: CREATE DUMMY VARIABLE FOR ROUTING:
BUY: S1a = (1) OR S1b = (1) OR S1c = 1 OR S1d = 1
NO BUY: S1a = (2) <u>AND</u> S1b = (2 OR 3) <u>AND</u> S1c = 2 AND S1d = (2 OR 3)  S1 = (3 OR 4) AND S1a = (3 OR 4)

PROG: ASK ALL
**S2a. 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 NEEDED: **This can also include expanding an existing business or starting up a new business in another country.**
PROG/INT: SINGLE CODE ONLY

1. Yes, currently invests abroad
2. No

PROG: ASK ALL WHO SAY NO AT S2a
**S2b. Are you considering investing in other countries in the future?**

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

PROG: ASK ALL WHO SAY 'YES' AT S2a: IF 'NO' AT S2a AUTOFILL CODE 2 ('NO') AT S2c AND SKIP TO S2d
**S2c. Does your organisation currently invest in the United Kingdom?**
PROG/INT: SINGLE CODE ONLY

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

PROG: ASK ALL - IF 'YES' AT S2c AUTOFILL CODE 1 ('YES')
**S2d. Have you invested in the UK within the last five years? (CLARIFY IF NECESSARY: Since [current month] 2018).**
1. Yes
2. No
3. (INT: DO NOT READ) Don't know

PROG: CREATE DUMMY VARIABLE FOR ROUTING:
INVEST: S2a = (1) OR S2b = (1) OR S2c = (1) OR S2d = (1)
NO INVEST: S2a = (2) AND S2b = (2 OR 3) AND S2c = (2) AND S2d= (2 OR 3)

IF DUMMY = "NO BUY" AND "NO INVEST", GO TO S5 & THEN CLOSE INTERVIEW.
ELSE CONTINUE

PROG: ASK ALL EXCEPT "NO BUY **AND** "NO INVEST"
**S3Open. 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.
PROG: OPEN-NUMERIC WITH TICK BOX [ ] FOR (DO NOT OFFER) Don't know

INT/PROG: ASK S3Coded IF "DON'T KNOW" (ELSE, AUTO-FILL S3Coded BASED ON RESPONSE AT S3Open)
**S3Coded**: **Is it around** [INSERT NUMBER FROM SAMPLE] **employees?**

| ANSWER | CODE |
|---|---|
| EXACT NUMBER | _____ |
| Don't know | X |
| If providing estimate (SINGLE CODE ONLY) | |

| ANSWER | CODE |
|---|---|
| [DO NOT READ OUT] **1-9** | 1 |
| **10-49** | 2 |
| **50-249** | 3 |
| **250-499** | 4 |
| **500-999** | 5 |
| **1,000-1,999** | 6 |
| **2,000 – 4,999** | 7 |
| **5,000 or more** | 8 |
| (DO NOT READ OUT) Don't know / refused | 9 |

CLOSE INTERVIEW IF S3 = 1 OR 9: **In that case, the survey is not relevant to you. Thank you very much for your time.**

ELSE CONTINUE

PROG: ASK ALL EXCEPT "NO BUY" **AND** "NO INVEST"

**S4. What was the organisation's approximate annual revenue/turnover in [local currency] in the last financial year? Is it around** [INSERT SAMPLE]**?**

| **Code at S4** | USA (US$) | China (Chinese Yuan) | Japan (Japanese Yen) | French/ Germany (Euro) | UAE (Emirati Dirham) | India (Indian Rupee, in Crore) | Brazil (BRL) | South Africa (ZAR) | Turkey (TRY) |
|---|---|---|---|---|---|---|---|---|---|
| **1** | Under USD $ 2 mil | Under ¥14 mil | Under ¥ 290 mil | Under EUR 2 mil | Under AED 7.3 mil | Under INR 16.4 crores | Under BRL 10.4 mil | Under ZAR 36 mil | Under TRY 37 mil |
| **2** | USD $2 mil - USD $10 mil | ¥14 mil - ¥70 mil | ¥290 mil - ¥1 bil | EUR 2 mil - EUR 10 mil | AED 7.3 mil - AED 40 mil | INR 16.4 cr - INR 82 cr | BRL 10.4 mil - BRL 50 mil | ZAR 36 mil - ZAR 200 mil | TRY 37 mil - TRY 200 mil |
| **3** | USD $10 mil - USD $50 mil | ¥70 mil - ¥400 mil | ¥1 bil - ¥7 bil | EUR 10 mil - EUR 51 mil | AED 40 mil - AED 200 mil | INR 82 cr – INR 400 cr | BRL 50 mil - BRL 300 mil | ZAR 200 mil - ZAR 900 mil | TRY 200 mil - TRY 900 mil |
| **4** | USD $50 mil - USD $100 mil | ¥400mil - ¥700 mil | ¥7 bil - ¥14 bil | EUR 51 mil - EUR 102 mil | AED 200 mil - AED 400 mil | INR 400 cr - INR 800 cr | BRL 300 mil - BRL 500 mil | ZAR 900 mil - ZAR 2 bil | TRY 900 mil - TRY 2 bil |
| **5** | USD $100 mil - USD $500 mil | ¥700 mil - ¥4 bil | ¥14 bil - ¥72 bil | EUR 102 mil - EUR 510 mil | AED 400 mil - AED 2 bil | INR 800 cr - INR 4,000 cr | BRL 500 mil - BRL 3 bil | ZAR 2 bil - ZAR 9 bil | TRY 2 bil - TRY 9 bil |
| **6** | USD $500 mil - USD $1 bil | ¥4 bil - ¥7 bil | ¥72 bil - ¥145 bil | EUR 510 mil - EUR 1 bil | AED 2 bil - AED 4 bil | INR 4,000 cr- INR 8,000 cr | BRL 3 bil - BRL 5 bil | ZAR 9 bil - ZAR 20 bil | TRY 9 bil - TRY 20 bil |
| **7** | Over USD | Over ¥7 | Over ¥ | Over | Over | Over INR | Over | Over | Over |

| Code at S4 | USA (US$) | China (Chinese Yuan) | Japan (Japanese Yen) | French/ Germany (Euro) | UAE (Emirati Dirham) | India (Indian Rupee, in Crore) | Brazil (BRL) | South Africa (ZAR) | Turkey (TRY) |
|---|---|---|---|---|---|---|---|---|---|
| | $1 bil | bil | 145 bil | EUR 1 bil | AED 4 bil | 8,000 cr | BRL 5 bil | ZAR 20 bil | TRY 20 bil |
| **8** | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused |

**Additional markets**

| Code at S4 | Mexico (MXN) | South Korea (South Korean Won) | Canada (CAD) | Australia (AUD) | Nigeria (NGN) |
|---|---|---|---|---|---|
| **1** | Under MXN 40 mil | Under ₩2.8 bil | Under CAD 2.7 mil | Under AUD 3.1 mil | Under NGN 870 mil |
| **2** | MXN 40 mil – MXN 200 mil | ₩2.8 bil - ₩10 bil | CAD 2.7 mil – CAD 10 mil | AUD 3.1 mil – 10 mil | NGN 870 mil – NGN 4 bil |
| **3** | MXN 200 mil – MXN 1 bil | ₩10 bil - ₩70 bil | CAD 10 mil – CAD 70 mil | AUD 10 mil – AUD 80 mil | NGN 4 bil – NGN 20 bil |
| **4** | MXN 1 bil – MXN 2 bil | ₩70 bil - ₩100 bil | CAD 70 mil – CAD 100 mil | AUD 80 mil – AUD 100 mil | NGN 20 bil – NGN 40 bil |
| **5** | MXN 2 bil – MXN 10 bil | ₩100 bil - ₩700 bil | CAD 100 mil – CAD 700 mil | AUD 100 mil – AUD 800 mil | NGN 40 bil – NGN 220 bil |
| **6** | MXN 10 bil – MXN 20 bil | ₩700 bil - ₩1 tril | CAD 700 mil – CAD 1 bil | AUD 800 mil – AUD 1 bil | NGN 220 bil – NGN 430 bil |
| **7** | Over MXN 20 bil | Over ₩1 tril | Over CAD 1 bil | Over AUD 1 bil | Over NGN 430 bil |
| **8** | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / | (INT: DO NOT READ OUT) Don't know / | (INT: DO NOT READ OUT) Don't know / | (INT: DO NOT READ OUT) Don't know / |

| **Code at S4** | Mexico (MXN) | South Korea (South Korean Won) | Canada (CAD) | Australia (AUD) | Nigeria (NGN) |
|---|---|---|---|---|---|
| | | refused | refused | refused | refused |

CLOSE INTERVIEW IF S4 = 1 OR (<**USD $2m in equivalent local currency)** OR 8 **(Don't know/refused)**
**In that case, the survey is not relevant to you. Thank you very much for your time.**

ELSE CONTINUE

PROG: USE THE S5 RESPONSE LIST AS PART OF DISPOSITION CODES (TO FEED INTO THE FIELDWORK UPDATES)
PROG: ASK ALL INELIGIBLE DUE TO "NO BUY" **AND** "NO INVEST"

**S5. 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?**
INT: DO NOT READ OUT. PROG: MULTI CODE OK, APART FROM DON'T KNOW.

| CODE | ANSWER |
|---|---|
| | ***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 British 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 |

| CODE | ANSWER |
|---|---|
| 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 |
| | ***FURTHER ADDITIONS TO THIS LIST (IF ANY) - NUMBER FROM CODE 25 ONWARDS…..*** |

INT: THANK AND CLOSE ALL ANSWERING S5

PROG: ASK IF S1b = 1

**S7. <u>How likely or unlikely is it</u> that your organisation will buy or import products or services from companies based abroad in the future? Would you say you are….READ OUT**

PROG/INT: SINGLE CODE ONLY

| ANSWER | CODE |
|---|---|
| Certain to | **1** |
| Very likely | **2** |
| Fairly likely | **3** |
| Fairly unlikely | **4** |
| Very unlikely | **5** |
| Certain not to | **6** |
| (DO NOT READ OUT) Don't know INT: | **7** |

PROG: ASK IF S2b = 1

**S8. <u>How likely or unlikely is it</u> that your organisation will expand its operations or invest in other countries in the future? Would you say you are….READ OUT**

PROG/INT: SINGLE CODE ONLY

| ANSWER | CODE |
|---|---|
| Certain to | **1** |
| Very likely | **2** |
| Fairly likely | **3** |
| Fairly unlikely | **4** |
| Very unlikely | **5** |
| Certain not to | **6** |
| (DO NOT READ OUT) Don't know | **7** |

PROG: ASK ALL
**S9a. We have [SAMPLE SECTOR] as your main industry sector. Can I just check that this is correct?**
PROG/INT: SINGLE CODE ONLY
DO NOT PROMPT

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

PROG: ASK IF CODES 2 OR 3 at S9a
**S9b. What is the main activity of this organisation?**

**CLARIFY AS NECESSARY: What does the organisation make? (**IF THEY DON'T MAKE/MANUFACTURE: **what services does the organisation provide?)**

PROG/INT: SINGLE CODE ONLY
PROMPT TO CODE

| ANSWER | CODE |
|---|---|
| A - Agriculture+Forestry+Fishing | 1 |
| B- Mining+Quarrying | 2 |
| C - Manufacturing | 3 |
| D- Electricity+Gas+Steam&Aircon | 4 |
| E- Water+Sewerage+Waste | 5 |
| F -Construction | 6 |
| G - Wholesale+Retail+Motor Repair | 7 |
| H - Transport+Storage | 8 |
| I - Accomodation+Food Service | 9 |
| J - Information+Communication | 10 |
| K - Finance+Insurance | 11 |
| L - Real Estate | 12 |
| M - Profession+Scientific+Technical | 13 |
| N - Admin+Support | 14 |
| P - Education | 15 |
| Q - Health+Social Work | 16 |
| R - Arts+Entertainment+Recreation | 17 |
| S - Other Services | 18 |

PROG: ASK ALL
**S9c. Does your business have a significant focus on the production or trade of environmental goods or services, which have been specifically designed to help meet environmental or climate production goals?**

PROG/INT: SINGLE CODE ONLY.
INT: READ OUT

1. No – don't focus on environmental goods/services
2. Yes – environmental goods
3. Yes – environmental services

4. Yes – both environmental goods and services
5. Prefer not to say [DO NOT READ OUT]

PROG: ADD VAR FOR GFEST DIT SECTORS

PROG: DUMMY VARIABLE FOR ROUTING AND TEXT
BUY: S1a = (1) OR S1b = (1) OR S1c = 1 OR S1d = 1
INVEST: S2a = (1) OR S2b = (1) OR S2c = 1 OR S2d = 1
IF BOTH BUY AND INVEST, USE 'LEAST FULL' ALGORITHM AND ALLOCATE TO BUY OR INVEST
SET UP DUMMY FOR EACH COUNTRY
PUT IN MAX QUOTA OF 150 FOR EACH BUY AND INVEST PER COUNTRY

END OF SCREENER

**MAIN QUESTIONNAIRE**
**CAMPAIGN AWARENESS – UNPROMPTED RECALL**

PROG: ASK ALL

**UR1. 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**

INT: DO NOT READ OUT. INT/PROG: MULTICODE OK
PROG: DO NOT SHOW COUNTRY OF RESPONDENT

| ANSWER | CODE |
|---|---|
| Australia | 1 |
| Brazil | 2 |
| Canada | 3 |
| China | 4 |
| Great Britain/United Kingdom/UK | 5 |
| France | 6 |
| Germany | 7 |
| Hong Kong | 8 |
| India | 9 |
| Italy | 10 |
| Japan | 11 |
| Mexico | 12 |

| ANSWER | CODE |
|---|---|
| Spain | 13 |
| Singapore | 14 |
| South Korea | 15 |
| USA | 16 |
| United Arab Emirates/Dubai | 17 |
| Other (SPECIFY) | 97 |
| None | 98 |
| Don’t know | 99 |
| Ireland | 22 |
| Morocco | 23 |
| Netherlands | 24 |
| Poland | 25 |
| Portugal | 26 |
| Taiwan | 27 |
| Thailand | 28 |
| Egypt | 29 |
| New Zealand | 30 |
| Saudi Arabia | 31 |

PROG: TIMESTAMP 2

**SECTION B: TRADE AND INVESTMENT IN UK AND COMPETITORS**

PROG: ASK IF BUY

**B1. How much, if anything, do you know about opportunities to buy products and services from organisations based in [READ OUT FIRST COUNTRY]? Would you say….**

PROG/INT: SINGLE CODE ONLY.

INT: READ OUT SCALE FOR EACH COUNTRY LISTED.

PROG: REVERSE SCALE. PROG: RANDOMISE COUNTRY LIST. PLEASE INCLUDE A “DON’T KNOW” OPTION FOR EACH COUNTRY

| | | A great deal | A fair amount | Not very much | Nothing at all |
|---|---|---|---|---|---|
| A | United Kingdom | 1 | 2 | 3 | 4 |
| C | Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS) | 1 | 2 | 3 | 4 |
| E | China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS) | 1 | 2 | 3 | 4 |
| F | The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS) | 1 | 2 | 3 | 4 |
| H | Japan (PROG: DO NOT DISPLAY FOR JAPAN | 1 | 2 | 3 | 4 |

| | | A great deal | A fair amount | Not very much | Nothing at all |
|---|---|---|---|---|---|
| | RESPONDENTS) | | | | |
| L | Republic of Ireland | 1 | 2 | 3 | 4 |
| M | France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS) | 1 | 2 | 3 | 4 |

PROG: ASK IF INVEST

**B1a. How much, if anything, do you know about opportunities to expand operations or invest in [READ OUT FIRST COUNTRY]? Would you say….**

PROG/INT: SINGLE CODE ONLY.

INT: READ OUT SCALE FOR EACH COUNTRY LISTED.

PROG: REVERSE SCALE. PROG: RANDOMISE COUNTRY LIST. PLEASE INCLUDE A "DON'T KNOW" OPTION FOR EACH COUNTRY

| | | A great deal | A fair amount | Not very much | Nothing at all |
|---|---|---|---|---|---|
| A | United Kingdom | 1 | 2 | 3 | 4 |
| C | Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS) | 1 | 2 | 3 | 4 |
| E | China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS) | 1 | 2 | 3 | 4 |
| F | The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS) | 1 | 2 | 3 | 4 |
| H | Japan (PROG: DO NOT DISPLAY FOR JAPAN RESPONDENTS) | 1 | 2 | 3 | 4 |
| L | Republic of Ireland | 1 | 2 | 3 | 4 |
| M | France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS) | 1 | 2 | 3 | 4 |
| N | Singapore | 1 | 2 | 3 | 4 |

PROG: ASK B3 IF BUY

**B3. How likely is your organisation to buy or import products and services from companies based in the following countries <u>in the next three years</u>? (CLARIFY IF NECESSARY: Until [current month] 2026). 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.**

PROG: RANDOMISE COUNTRY LIST.

| | | Not at all likely | | | | | | | | | 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 |
| E | China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| F | The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 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 |

Ask everyone who currently buys from or is planning to buy from the UK:

PROG: ASK S1c CODE 1 (CURRENTLY BUYS FROM THE UK) OR S1c CODE 2 AND B3_A CODES 7-10 (NOT CURRENTLY BUYING BUT PLANNING TO BUY)

**B3a. How much, if anything, are you planning on spending in purchases of goods or services from UK companies in the next 12 months?**

| **Code at S4** | USA (US$) | China (Chinese Yuan) | Japan (Japanese Yen) | French/ Germany (Euro) | UAE (Emirati Dirham) | India (Indian Rupee, in Crore) | Brazil (BRL) | South Africa (ZAR) | Turkey (TRY) |
|---|---|---|---|---|---|---|---|---|---|
| **1** | 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 |
| **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 |
| **4** | USD $5.5 mil - USD $10.5 mil | ¥40 mil - ¥74 mil | ¥ 800 mil - ¥ 1.5 bil | EUR 5.6 mil - EUR 11 mil | AED 20 mil - AED 38 mil | INR 45 cr – INR 86 cr | BRL 29 mil - BRL 55 mil | ZAR 99 mil - ZAR 189 mil | TRY 102 mil - TRY 195 mil |
| **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 |

| Code at S4 | USA (US$) | China (Chinese Yuan) | Japan (Japanese Yen) | French/ Germany (Euro) | UAE (Emirati Dirham) | India (Indian Rupee, in Crore) | Brazil (BRL) | South Africa (ZAR) | Turkey (TRY) |
|---|---|---|---|---|---|---|---|---|---|
| **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 |
| **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 |
| **8** | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused |
| **9** | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say |

**Additional markets**

| Code at S4 | Mexico (MXN) | South Korea (South Korean Won) | Canada (CAD) | Australia (AUD) | Nigeria (NGN) |
|---|---|---|---|---|---|
| **1** | Nothing | Nothing | Nothing | Nothing | Nothing |
| **2** | 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** | 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** | MXN 110 mil – MXN 211 mil | ₩7.8 bil - ₩15 bil | CAD 7,5 mil – CAD 14.4 mil | AUD 8.6 mil – AUD 16.3 mil | NGN 2.4 bil – NGN 4.5 bil |

| **Code at S4** | Mexico (MXN) | South Korea (South Korean Won) | Canada (CAD) | Australia (AUD) | Nigeria (NGN) |
|---|---|---|---|---|---|
| **5** | 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** | 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 MXN 401 mil | Over ₩28 bil | Over CAD 27.4 mil | Over AUD 31.1 mil | Over NGN 8.7 bil |
| **8** | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused | (INT: DO NOT READ OUT) Don't know / refused |
| **9** | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say | (INT: DO NOT READ OUT) Prefer not to say |

PROG: ASK IF CODE 1 TO 5 FOR UK (AT B3_A) = NOT LIKELY TO BUY/IMPORT FROM UK

**B4a. What are the main reasons why you would be unlikely to buy or import products and services from UK companies? PROBE: What other reasons?**

PROG: MULTICODE EXCEPT DON'T KNOW/not applicable

INT: IMPORTANT – PLEASE PROBE FULLY FOR AS MUCH DETAIL AS POSSIBLE. DO NOT READ OUT.

| CODE | ANSWER |
|---|---|
| | ***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 |

| CODE | ANSWER |
|---|---|
| 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 |
| | ***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 |
| | ***OTHER:*** |
| 15 | Other (SPECIFY) |
| 16 | Don't know |
| 19 | Environmental reasons |
| 20 | Covid-19 / coronavirus |
| 21 | Concerns around the war in Ukraine |
| 22 | Current inflation is prohibitive |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 22 ONWARDS…..*** |

PROG: ASK IF CODE 6 TO 10 FOR UK (AT B3_A ) = LIKELY TO BUY/IMPORT FROM UK
**B4b (ASK IF 6-10 at B3) What are the main reasons why you would be likely to buy or import products and services from UK companies? PROBE: What other reasons?**
PROG: MULTICODE EXCEPT DON'T KNOW
INT: DO NOT READ OUT

| CODE | ANSWER |
|---|---|
| | ***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 |
| | |
| 17 | Favourable exchange rates |
| 23 | Brexit opportunities |

| CODE | ANSWER |
|---|---|
| | |
| 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 |
| | ***UK PUBLICITY:*** |
| 16 | Events with informative content |
| | ***OTHER:*** |
| 25 | Environmental reasons |
| 26 | Covid-19 / coronavirus |
| 29 | Concerns around the war in Ukraine |
| 21 | Other (SPECIFY) |
| 22 | Don't know |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 30 ONWARDS…..*** |

PROG: ASK IF BUY:

**B3b. 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?**

**IF MORE LIKELY: Is that much more likely or a little more likely?**
**IF LESS LIKELY: Is that much less likely or a little less likely?**

| | ANSWER | CODE |
|---|---|---|
| | Much more likely | **1** |
| | A little more likely | **2** |
| | No difference | **3** |
| | A little less likely | **4** |
| | Much less likely | **5** |
| | Don't know INT: DO NOT READ OUT | **6** |

PROG: ASK ALL BUY

**B5d. 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?**

PROG: MULTICODE EXCEPT DON'T KNOW/none

INT: DO NOT READ OUT

| CODE | ANSWER |
|---|---|
| | ***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/DIT/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) |
| 20 | Others (SPECIFY) |
| 21 | Don't know |
| 22 | None |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 24 ONWARDS…..*** |

PROG: ASK IF INVEST

**B6. How likely, if at all, is it that your organisation <IF DO NOT CURRENTLY INVEST S2a=2: will start / IF CURRENTLY INVEST S2a=1: will continue> to expand or invest in the following countries in the next three years? (CLARIFY IF NECESSARY: Until [current month] 2026). 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.**

PROG: RANDOMISE COUNTRY LIST.

| | | Not at all likely | | | | | | | | | 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 |
| E | China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| F | The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 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 |

PROG: ASK IF CODE 1 TO 5 FOR UK (AT B6_A) = NOT LIKELY TO EXPAND TO/INVEST IN UK
**B6a. (ASK IF 1-5 at B6) What are the main reasons why you would be unlikely to expand to or invest in the UK?**... **PROBE: What other reasons?**
INT: IMPORTANT – PLEASE PROBE FULLY FOR AS MUCH DETAIL AS POSSIBLE. DO NOT READ OUT.
PROG: MULTICODE except DK

| CODE | ANSWER |
|---|---|
| | ***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 |

| CODE | ANSWER |
|---|---|
| 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 |
| | ***CULTURAL OBSTACLES:*** |
| 13 | Language issue |
| 17 | Physical safety/terror threat |
| 22 | Distance / geographic location |
| | ***OTHER:*** |
| 20 | Environmental reasons |
| 21 | Covid-19 / coronavirus |
| 18 | Other (SPECIFY) |
| 19 | Don't know |
| 22 | Concerns around the war in Ukraine |
| 23 | Current inflation is prohibitive |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 26 ONWARDS…..*** |

PROG: ASK IF CODE 6 TO 10 FOR UK (AT B6_A) = LIKELY TO EXPAND TO/INVEST IN UK
**B6b. What are the main reasons why you are likely to expand to or invest in the UK? PROBE: What other reasons?**
PROG: MULTI CODE (EXCEPT DK)
INT: DO NOT READ OUT

| CODE | ANSWER |
|---|---|
| | ***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 |

| CODE | ANSWER |
|---|---|
| 26 | Trading arrangements between the UK and my country |
| 27 | Existence of a Free Trade Agreement between the UK and my country |
| | ***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 |
| | ***OTHER:*** |
| 22 | Environmental reasons |
| 23 | Covid-19 / coronavirus |
| 29 | Concerns around the war in Ukraine |
| 20 | Other (SPECIFY) |
| 21 | Don't know/ Not applicable |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 30 ONWARDS…..*** |

PROG: ASK IF INVEST

**B6a1. Compared to 12 months ago, would you say that you are more or less likely to expand or invest in the UK?**

**IF MORE LIKELY: Is that much more likely or a little more likely?**
**IF LESS LIKELY: Is that much less likely or a little less likely?**

| | ANSWER | CODE |
|---|---|---|
| | Much more likely | **1** |
| | A little more likely | **2** |
| | No difference | **3** |
| | A little less likely | **4** |
| | Much less likely | **5** |
| | Don't know INT: DO NOT READ OUT | **6** |

PROG: ASK ALL INVEST

**B7d Which organisation (or type of organisation), if any would you be most likely to approach for help or advice on expanding or investing <u>in other countries</u>? PROBE: What others?**

PROG: MULTICODE EXCEPT DON'T KNOW

INT: DO NOT READ OUT

| CODE | ANSWER |
|---|---|
| | ***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 |
| | ***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 |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 24 ONWARDS…..*** |

PROG: TIMESTAMP 3

## SECTION C: ASSOCIATION WITH KEY ATTRIBUTES

PROG: ASK ALL

**C1. Now thinking specifically about trading with or investing in the UK… how favourable or unfavourable are you towards the UK as a whole…**

| | ANSWER | CODE |
|---|---|---|
| | Very favorable | **1** |
| | Somewhat favorable | **2** |
| | Neither favorable nor unfavorable | **3** |
| | Somewhat unfavorable | **4** |
| | Very unfavorable | **5** |
| | Don't know INT: DO NOT READ OUT | **6** |

PROG: ASK ALL

**C1a. 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?**

PROG: SINGLE CODE

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

PROG: ASK IF BUY

**C2_a. 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 the UK. 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 the UK.**

PROG: RANDOMISE STATEMENTS.

INT: READ OUT EACH STATEMENT. PLEASE ENTER CODE 99 IF "DON'T KNOW"

**IF BUY**

| | **BUY** | **Score (1-10)** |
|---|---|---|
| **A** | Reputation for providing innovative products or services | |
| **B** | High quality products and services | |
| **C** | Competitive pricing | |
| **D** | Working within a high quality, reliable infrastructure | |
| **E** | Reputation for providing creative products or services | |
| **F** | Open and welcoming to international business | |
| **J** | Easy to ship goods | |
| **K** | Shares the same working values and practices as businesses in my country | |
| **L** | Environmentally friendly products and services | |

PROG: IF BUY AND NOT GERMANY OR FRANCE:
**C2A2a/C2A2b. Thinking about the same reasons, how much do you associate each one with companies in PROGRAMMER: ALTERNATE ORDER OF < the United Kingdom or Germany> AND < Germany 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 FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_a, ONE PER SCREEN. RANDOMISE ORDER IN WHICH UK OR GERMANY IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW).
ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

| | **BUY** | **Score (1-10) UK** | **Score (1-10) Germany** |
|---|---|---|---|
| **A** | Reputation for providing innovative products or services | | |
| **B** | High quality products and services | | |
| **C** | Competitive pricing | | |
| **D** | Working within a high quality, reliable infrastructure | | |
| **E** | Reputation for providing creative products or services | | |
| **F** | Open and welcoming to international business | | |
| **J** | Easy to ship goods | | |
| **K** | Shares the same working values and practices as businesses in my country | | |
| **L** | Environmentally friendly products and services | | |

PROG: ASK IF BUY AND GERMANY OR FRANCE
**C2A2c/C2A2d. Thinking about the same factors, 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 FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_a, ONE PER SCREEN. RANDOMISE ORDER IN WHICH UK OR USA IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW).
ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

| | **BUY** | **Score (1-10) UK** | **Score (1-10) USA** |
|---|---|---|---|
| **A** | Reputation for providing innovative products or services | | |

| | BUY | Score (1-10) UK | Score (1-10) USA |
|---|---|---|---|
| **B** | High quality products and services | | |
| **C** | Competitive pricing | | |
| **D** | Working within a high quality, reliable infrastructure | | |
| **E** | Reputation for providing creative products or services | | |
| **F** | Open and welcoming to international business | | |
| **J** | Easy to ship goods | | |
| **K** | Shares the same working values and practices as businesses in my country | | |
| **L** | Environmentally friendly products and services | | |

PROG: ASK IF "INVEST"

**C2_b. 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. Please use a scale of 1 to 10, where 1 is not important at all and 10 is absolutely essential.**

PROG: RANDOMISE STATEMENTS.
INT: READ OUT EACH STATEMENT. PLEASE ENTER CODE 99 IF "DON'T KNOW"

| | INVEST | Score (1-10) |
|---|---|---|
| **A** | Access to relevant skills and labour | |
| **B** | Competitive set up costs | |
| **C** | High quality, reliable infrastructure | |
| **D** | Important business centre for my sector | |
| **E** | Open and welcoming to international business | |
| **F** | Gateway to other markets | |
| **H** | Potential to make high returns | |
| **I** | Environmentally friendly | |

PROG: ASK IF "INVEST" AND NOT IN GERMANY OR FRANCE

**C2B2a/C2B2b. Thinking about the same factors, how much do you associate each one with PROGRAMMER: ALTERNATE ORDER OF < the United Kingdom or Germany> AND < Germany 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 FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_b, ONE PER SCREEN.
RANDOMISE ORDER IN WHICH UK OR GERMANY IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW).
ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

| | INVEST | Score (1-10) UK | Score (1-10) Germany |
|---|---|---|---|
| **A** | Access to relevant skills and labour | | |
| **B** | Competitive set up costs | | |
| **C** | High quality, reliable infrastructure | | |
| **D** | Important business centre for my sector | | |
| **E** | Open and welcoming to international business | | |
| **F** | Gateway to other markets | | |
| **H** | Potential to make high returns | | |
| **I** | Environmentally friendly | | |

PROG: ASK IF INVEST AND GERMANY OR FRANCE

**C2B2c/C2B2d. 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 FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_b, ONE PER SCREEN. RANDOMISE ORDER IN WHICH UK OR USA IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW). ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

| | INVEST | Score (1-10) UK | Score (1-10) USA |
|---|---|---|---|
| **A** | Access to relevant skills and labour | | |
| **B** | Competitive set up costs | | |
| **C** | High quality, reliable infrastructure | | |
| **D** | Important business centre for my sector | | |
| **E** | Open and welcoming to international business | | |
| **F** | Gateway to other markets | | |
| **H** | Potential to make high returns | | |
| **I** | Environmentally friendly | | |

PROG: TIMESTAMP 4

## SECTION D: CAMPAIGN AWARENESS – PROMPTED RECALL

PROG: ASK ALL

**D1. 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]**

PROG: SINGLE CODE FOR EACH. RANDOMISE ORDER.

.

| | | YES | NO | (DO NOT READ OUT) DON'T KNOW/ NOT SURE |
|---|---|---|---|---|
| 1 | United Kingdom | 1 | 2 | 3 |
| 3 | Germany (PROG: DO NOT DISPLAY IN GERMANY) | 1 | 2 | 3 |
| 5 | China (PROG: DO NOT DISPLAY IN CHINA) | 1 | 2 | 3 |
| 6 | United States of America (PROG: DO NOT DISPLAY IN USA) | 1 | 2 | 3 |
| 8 | Japan (PROG: DO NOT DISPLAY IN JAPAN) | 1 | 2 | 3 |
| 12 | Republic of Ireland | 1 | 2 | 3 |

PROG: ASK D2 IF UK/GREAT BRITAIN MENTIONED AT UR1 (CODES 5 OR 18) AND/OR AT D1 (YES FOR STATEMENT 1)

**D2.** **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?**
INT: DO NOT READ/PROMPT.
PROG: MULTICODE (EXCEPT CAN'T REMEMBER)

| CODE | ANSWER |
|---|---|
| | ***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 |
| | ***SOCIAL MEDIA SITES:*** |
| 7 | LinkedIn |
| 8 | 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 |
| | ***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. DIT, Chamber of Commerce) |
| 20 | Via UK Export Finance or a Trade finance organization |
| 23 | |
| 24 | |
| 25 | |
| | ***OTHERS:*** |
| 16 | From friends, family or colleagues |
| 21 | Other (SPECIFY) |
| 22 | Can't remember |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 27 ONWARDS…..*** |

PROG: ASK D3 IF UK/GREAT BRITAIN MENTIONED AT UR1 (CODES 5 OR 18) AND/OR D1 (YES FOR STATEMENT 1)

**D3. 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?**

INT: DO NOT READ/PROMPT. PROG: MULTICODE OK

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
20. UK/Britain sees things differently
21. UK/Britain is a sustainable place to do business with
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

PROG: ASK ALL
**D4. 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?**

1. Yes – go to D4A
2. No – go to D4B

PROG: ASK IF CODE 1 AT D4
**D4A. Please go to** [fieldwork partner's site] 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.**
**SINGLE CODE**

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. (DO NOT READ OUT) Don't know

PROG: ASK IF CODE 1 OR 2 AT D4A
**D4AI. Please can you give me a brief description of what you see on the screen?**
INT: THIS IS A CHECK – PLEASE DO NOT READ OUT THE RESPONSES

1. Respondent gives an accurate description
2. Respondent does not appear to have seen the visuals

PROG: ASK IF CODE 1 AT D4
**D4AII. 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

1. Yes, this image
2. Yes, seen something similar with the GREAT logo
3. No, not seen anything like this
4. Don't know (INT: DO NOT READ OUT)

PROG: ASK IF CODE 2 AT D4 OR CODE 2 AT D4AI
**D4B. Can you recall having seen, read or heard any advertising, events or promotion which states 'We are the UK and we are ready to trade with you', or which includes phrases using the word GREAT to promote 'Great Britain' as a place to do business with?**
**This might have included the phrases 'Innovation is GREAT', 'Creativity is GREAT' or 'Invest in GREAT'.**
**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.**

1. Yes – remember seeing/hearing
2. No – have not seen (PROG: ALL NOW SKIP TO INSTRUCTION BEFORE D6B)
3. Don't know/not sure INT: DO NOT READ OUT (PROG: ALL NOW SKIP TO INSTRUCTION BEFORE D6B)

DP: create dummy variables for GREAT recognisers
GREAT recognisers: CODE 1 or 2 AT D4A AND CODE 1 at D4AI, OR CODE 1 or 2 AT D4AII, OR CODE 1 AT D4B
GREAT non-recognisers:
CODE 1 or 2 AT D4A AND CODE 2 AT D4AI AND CODE 3 or 4 AT D4AII AND CODE 2 or 3 AT D4B
OR CODE 3 or 4 at D4A AND 3 or 4 at D4AII AND CODE 2 or 3 AT D4B

ASK ALL GREAT RECOGNISERS: (CODE 1 OR 2 AT D4ABUY OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4ALL OR CODE 1 AT D4B)
**D4C. Where do you remember seeing or hearing about GREAT?**

PROG: MULTICODE (EXCEPT CAN'T REMEMBER)
INT: DO NOT READ/PROMPT

| CODE | ANSWER |
|---|---|
| | ***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 |

| CODE | ANSWER |
|---|---|
| | ***OTHER ONLINE (NON-SPECIFIC):*** |
| 12 | Website / Online / Internet |
| 13 | Emails |
| | ***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 |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 22 ONWARDS…..*** |

ASK ALL GREAT RECOGNISERS: (CODE 1 OR 2 AT D4ABUY OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4ALL OR CODE 1 AT D4B)

**D5. 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?**

PROG/INT: SINGLE CODE

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

ASK ALL GREAT RECOGNISERS: (CODE 1 OR 2 AT D4A BUY OR 1 OR 2 AT D4A INVEST OR CODE 1 OR 2 AT D4ALL OR CODE 1 AT D4B)

**D6. 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.**

*The advertising, events or promotional activity:*

INT: GIVE A SCORE 1-10 FOR EACH STATEMENT
PROG: RANDOMISE ORDER OF STATEMENTS. ALLOW DON'T KNOW

| | | Strongly disagree | | | | | | | | Strongly agree | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **(DO NOT READ OUT) Don't know** |
| A | was different from promotions for other foreign business markets | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| B | 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 |
| D | told you something new about the UK | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| E | was relevant to you | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| F | motivates you to do business with the UK | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| G | (IF BUY): has had a direct impact on the amount of money your company has spent on procuring products and services from the UK<br><br>(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 |

PROG: ASK IF REMEMBER SEEING ANY ADVERTISING/PROMOTION OF UK (VIA GREAT OR OTHER), CODE 1 OR 2 AT D4ABUY OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4ALL OR CODE 1 AT D4B, CODE 1 AT D1 (FOR UK) OR CODES 5 OR 18 AT UR1

**D6B. Did you take any action as a result of seeing this advertising, or any other promotions for the United Kingdom?**
PROG: SINGLE CODE

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

PROG: ASK IF D6B=1
**D6C.What did you do? PROBE: What actions did you take (even if only minor ones)?**
PROG: MULTICODE (EXCEPT CAN'T REMEMBER)
INT: DO NOT READ/PROMPT

| CODE | ANSWER |
|---|---|
| | ***ONLINE:*** |

| CODE | ANSWER |
|---|---|
| 1 | Visited the GREAT website |
| 18 | Downloaded an e-book from 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 |
| 20 | Used DIT's Investment Atlas |
| 21 | Used DIT's Find a Supplier |
| 22 | Contacted a potential UK supplier using DIT's Find a Supplier |
| | ***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 DIT event |
| 9 | Attended a general event because UK were present |
| | ***OTHER:*** |
| 15 | No action taken |
| 16 | Don't Know |
| 17 | Other (SPECIFY) |
| | ***FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 24 ONWARDS…..*** |

PROG: ASK ALL WHO RECALL/RECOGNISE GREAT (CODE 1 OR 2 AT D4ABUY OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4AII OR CODE 1 AT D4B) AND WHO EITHER ALREADY INVEST/ BUY IN UK OR ARE CONSIDERING DOING SO (BUY OR INVEST) (
S1c = 1 OR B3 (A) = 6-10 AND/OR OR S2c = 1 OR B6 (A) = 6-10

**D6D. 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 …?**

INT/PROG: READ OUT. SINGLE CODE. REVERSE ORDER PER INTERVIEW (CODES 1-5)

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. (DO NOT READ OUT) Don't know

PROG: TIMESTAMP 5

**SECTION E: AWARENESS OF DIT, BREXIT AND KEY CONTACT INFO**

PROG: ASK IF INVEST: FROM INTERVIEW TO INTERVIEW, ROTATE ORDER OF E3b1 AND (E3b2 + E3)
**E3b1. Which sources do you use to find out about opportunities of where to invest abroad?**

INT, ADD IF NEEDED: **In this context, 'invest' can also include expanding an existing business or starting up a new business in another country.**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: 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
23. International government websites
17. Other countries' embassies

18. Bank/venture capitalist
19. Webinars / virtual events
20. Other (SPECIFY)
21. DK
22. None/Don't use

PROG: ASK E3b2 TO ALL (INVEST AND BUY): BUY NOT ASKED E3b1, SO WILL ALWAYS BE ASKED E3b2 AND (WHEN APPLICABLE) E3.

**E3b2. Which sources do you use to stay informed about your specific industry?**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: 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
22. None/Don't use

PROG: ASK ALL WHO SELECT TWO OR MORE OF CODES 1-20 (INCLUSIVE) AT E3b2
**E3. 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
INT: 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
22. None/Don't use

PROG: ASK ALL

**(Ask all buyers)**

**G3A1: 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. 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 OPTIONS]**

| | 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 procuring internationally | | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| The war in Ukraine has made procuring internationally more risky | | | | | | |

**(Ask all investors).**

**G3A1b: I am going to read out some statements made by people in businesses like yours and for each please tell me to what extent you agree or disagree. 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 OPTIONS]**

| | 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 investing internationally | | | | | | |
| The war in Ukraine has made investing internationally more risky | | | | | | |

**SECTION F: FREE TRADE AGREEMENTS**

PROG: ASK ALL FRANCE, GERMANY

**FG1A. Are you aware of the Trade and Cooperation Agreement between the EU and the UK?**

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

PROG: ASK IF BUY FRANCE, GERMANY AND HAVE BOUGHT THE UK IN THE PAST 5 YEARS (S1D = 1)

**FG1B. You said you have bought or imported products or services from companies in the UK in the past 5 years. Have you changed the way you buy or import products or services from the UK since the introduction of the Trade and Cooperation Agreement between the EU and the UK in January 2021?**

1. No
2. Yes
3. Don't know (Do not read out)

**FG1Ba.** IF YES: **What are the main changes you have made to how you buy or import products or services from companies in the UK since January 2021?**

PROG: MULTICODE (EXCEPT DK/NONE; CODES 1-4 EXCLUSIVE)
INT: DO NOT READ/PROMPT

1. Stopped buying from the UK
2. Reduced amount bought/imported from the UK
3. Started buying/importing from the UK
4. Increased amount bought/imported from UK
5. Bought/Imported from the UK via secondary country
6. Used intermediary company to buy/import from the UK i.e. customs agents
7. Sourced alternative products from other countries
8. Other [SPECIFY]
9. Don't know

PROG: ASK IF INVEST FRANCE, GERMANY AND HAVE INVESTED IN THE UK IN THE PAST 5 YEARS

**FG1C. You said you have expanded operations or invested in the UK in the past 5 years. Have you changed the way you expand operations or invest in the UK since the introduction of the Trade and Cooperation Agreement between the EU and the UK in January 2021?**

1. No
2. Yes
3. Don't know (Do not read out)

**FG1Ca. IF YES: What are the main changes you have made to how you expand operations or invest in the UK since January 2021?**

PROG: MULTICODE (EXCEPT DK/NONE; CODES 1-4 EXCLUSIVE)
INT: DO NOT READ/PROMPT

1. Stopped investing in the UK
2. Reduced investments in the UK
3. Started investing in the UK
4. Increased investments in the UK
5. Sought alternative investment opportunities in other countries
6. Other
7. Don't know

PROG: ASK ALL JAPAN, SOUTH AFRICA, MEXICO, SOUTH KOREA, CANADA, TURKEY

**FG2A. Are you aware of the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK?**

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

CLARIFY 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.

**FG2B. There is now a Free Trade Agreement between the UK and [RESPONDENT'S COUNTRY] in place. Previously, this was covered by the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the European Union. 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.**
PROG: DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE.

A. Buy or import products or services from companies in the UK
B. Expand or invest in the UK

CLARIFY 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.

**IF MORE LIKELY: Is that much more or a little more likely?**
**IF LESS LIKELY: Is that much less or a little less likely?**

| | ANSWER | CODE |
|---|---|---|
| | Much more likely | **1** |
| | A little more likely | **2** |
| | No difference | **3** |
| | A little less likely | **4** |
| | Much less likely | **5** |
| | Don't know INT: DO NOT READ OUT | **6** |

**FG2B1. IF MORE LIKELY: You said you are more likely to [pipe answer from F2B] due to the Free Trade Agreement between the UK and [RESPONDENT'S COUNTRY]. Can I ask why you say that?**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

1. Simplified complex paperwork
2. Reduced duties/taxes
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
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
8. Other
9. Don't know

**FG2B2. IF LESS LIKELY: You said you are less likely to [pipe answer from F2B] due to the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. Can I ask why you say that?**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

1. More complex paperwork
2. Increased duties/taxes
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
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
8. Other
9. Don't know

PROG: ASK ALL USA, BRAZIL, INDIA, CHINA, UAE, NIGERIA
**FG3A. Would a Free Trade Agreement between your country and the UK make your 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.**
PROG: DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE.

A. Buy or import products or services from companies in the UK
B. Expand or invest in the UK

CLARIFY 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.

**IF MORE LIKELY: Is that much more or a little more likely?**
**IF LESS LIKELY: Is that much less or a little less likely?**

| ANSWER | CODE |
|---|---|
| Much more likely | **1** |
| A little more likely | **2** |
| No difference | **3** |
| A little less likely | **4** |
| Much less likely | **5** |
| Don’t know INT: DO NOT READ OUT | **6** |

**FG3A1. IF MORE LIKELY: You said you would be more likely to [pipe answer from F2C] if there was a Free Trade Agreement between [RESPONDENT’S COUNTRY] and the UK. Can I ask why you say that?**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

1. Simplified complex paperwork
2. Reduced duties/taxes
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
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
8. Other
9. Don’t know

**FG3A2. IF LESS LIKELY: You said you would be less likely to [pipe answer from F2C] if there was a Free Trade Agreement between [RESPONDENT’S COUNTRY] and the UK. Can I ask why you say that?**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

1. More complex paperwork
2. Increased duties/taxes
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
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
8. Other
9. Don’t know

PROG: ASK ALL AUSTRALIA

**FG4A. Are you aware that [RESPONDENT'S COUNTRY] has signed a Free Trade Agreement with the UK?**

4. Yes
5. No
6. Don't know (DO NOT READ OUT)

CLARIFY 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.

**FG4B. [RESPONDENT'S COUNTRY] has signed a Free Trade Agreement with the UK, but it is not yet in force as it still requires approval from the parliaments of both countries. Would a Free Trade Agreement between [RESPONDENT'S COUNTRY]and the UK entering into force make you more or less likely to do any of the following, or would it make no difference? Please think about reasons specifically relating to the trade agreement rather than about doing business with the UK in general.**
PROG: DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE.

A. Buy or import products or services from companies in the UK
B. Expand or invest in the UK

CLARIFY 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.

**IF MORE LIKELY: Is that much more or a little more likely?**
**IF LESS LIKELY: Is that much less or a little less likely**

| | ANSWER | CODE |
|---|---|---|
| | Much more likely | **1** |
| | A little more likely | **2** |
| | No difference | **3** |
| | A little less likely | **4** |
| | Much less likely | **5** |
| | Don't know INT: DO NOT READ OUT | **6** |

**FG4B1. IF MORE LIKELY: You said you would be more likely to [pipe answer from F2A] if a Free Trade Agreement entered into force between the UK and [RESPONDENT'S COUNTRY]. Can I ask why you say that?**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

1. Simplified complex paperwork

2. Reduced duties/taxes
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 previous trading arrangements
7. Increased supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared previous trading arrangements
8. Other
9. Don't know

**FG4B2. IF LESS LIKELY: You said you would be less likely to [pipe answer from F2A] if a Free Trade Agreement entered into force between the UK and [RESPONDENT'S COUNTRY]. Can I ask why you say that?**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

1. More complex paperwork
2. Increased duties/taxes
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 previous trading arrangements
7. Reduced supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared to previous trading arrangements
8. Other
9. Don't know

**SECTION H: Investment Transformation Programme**

PROG: ASK IF INVEST AND LIKELY TO INVEST IN THE UK

PROG: ASK S2c CODE 1 AND B6_A CODES 7-10 (CURRENTLY INVESTS IN THE UK AND PLANNING TO INVEST)

**H1. You said earlier that you were likely to invest in the UK in the next 3 years. If the UK Government developed a self-service digital platform that your organisation could use independently to help with completing your investment projects, how likely or unlikely would your organisation be to use it?**
PROG: SINGLE CODE.

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

PROG: ASK IF H1 1 OR 2

**H1a. What information or guidance a self-service digital platform would you find most useful?**

PROG: MULTICODE [EXCEPT DK/NONE]

INT: DO NOT READ OUT/PROMPT

1. Guidance on setting up in the UK, e.g., information on setting up a bank account, visa support
2. Guidance and analysis on market opportunities and investment propositions in the UK
3. Information and analysis on the UK business and policy environment
4. Information on available grants and incentives and how to access finance
5. Information, analysis, and recommendations on UK infrastructure and where to set up in the UK
6. Information, analysis and advice on workforce and skills
7. Information and analysis on sites, assistance with property searches and support on arranging site visits
8. Information and support on moving, living, and doing business in the UK
9. Introductions or referrals to link into the business ecosystem, for example to universities, trade associations or local Government
10. None of the above
11. Don’t know

PROG: ASK IF INVEST

**H2 How likely or unlikely is your experience of expanding or investing into a new country to influence your decision on whether to expand your operations or reinvest further in that country after your initial investment?**

PROG: Single Code

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

PROG: ASK IF INVEST

**H3 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.

PROG: SINGLE CODE

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

PROG: ASK ALL

**G4. That concludes the interview, many thanks for your help and input today, on behalf of (insert contractor), and also the UK Government's Department for International Trade (DIT).**

**DIT may wish to contact you to take part in further research on this topic in the next 12 months. <u>Would you be happy for us to send Department for International Trade (DIT) a record of your name, company name email address and telephone number to contact you about future research?</u>**
**DIT would only hold these details on record for 12 months and would only use then for the sole purpose of contacting you as part of research on the same topic on behalf of the UK Government. If you agree to this, your details would be transferred securely to DIT by our fieldwork partners, via Yonder.**

PROG: SINGLE CODE

1. Yes – name, company name and email: enter email address
2. Yes – name, company name and telephone: enter telephone number
3. No – I do not wish to participate in further research

**THANK AND CLOSE**

gov.uk

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**Published by**
**Department for Business, Innovation, Science and Trade**

**26 November 2026**