

Department for
Business, Innovation,
Science and Trade

International Buyers and Investors Study 2023

Technical report

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Contents

1. Methodology 3

1.1. Objectives 3

1.2. Sampling 4
1.2.1. Sampling population 4
1.2.2. Sampling frame 4
1.2.3. Sample design 4
1.2.4. Sample selection 5

1.3. Questionnaire design 18
1.3.1. Questionnaire content 19
1.3.2 Currency conversions 20
1.3.3. Campaign materials 21

1.4. Fieldwork 22
1.4.1 Screening and Eligibility 23

1.5. Weighted and unweighted sample profiles 25

1.6. Effective base sizes and margins of error 27

1.7. Data processing and analytics 28

1.8. Sub-group definitions 28
1.8.1. Business size 28
1.8.2. Sector 29
1.8.3. Market 30
1.8.4. Buy and Invest 30
1.8.5. GREAT Recognition 31

1.9. Quality 32

1.10. Reporting methodology 32

2. Background quality report 33

2.1. Data quality of data sources 33

2.2. Quality control 33

3. Appendix 35

3.1. Questionnaire 35

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 Yonder in 2023.

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 The GREAT Global Trade Campaign, which promotes the UK as an attractive destination for high-value investment and a leading source for high-quality and innovative brands, goods and services. It supports several government ambitions under the themes of international trade and Global Britain, both of which are at the heart of the Export Strategy, DBT's Outcome Delivery Plan for 2023, 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 help meet these objectives, Yonder conducted 4,004 interviews with businesses that have the potential to buy from and/or invest in other countries. Fieldwork took place in 16 markets: France, Germany, the United States of America (USA), Japan, China, India, the United Arab Emirates (UAE), South Africa, Brazil, Turkey, Canada, Mexico, South Korea, Australia, Nigeria, and Saudi Arabia. The survey was conducted using CATI (Computer Assisted Telephone Interviewing) by Yonder's fieldwork partner, between 10 July 2023 and 20 November 2023.

1.2. Sampling

1.2.1. Sampling population

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

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

Businesses were selected for inclusion in the sample if they met criteria 1 and 2 (this information was included in the sample frame). Interviewers also verified this information at the start of the interview. Businesses were screened in the interview on the third criteria, of which outcomes are detailed 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 in order to use a consistent sample frame to match the previous surveys. It is comprehensive in each of the markets, and ensures the ability to replicate the same methodology in potential future studies.

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 6 years (2018 to 2023).

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 2022 final set of interviews achieved. This was consistent with the approach adopted in the 2018, 2019, 2020, 2021, and 2022 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 2022. As the incidence of businesses that had previously or were likely to buy or invest internationally varied considerably by sector, size and market, it was not possible to set precise

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

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

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

Prior to contacting potential respondents, interviewers reviewed online executive profiles for additional information available about each record. In some instances, searches were run through websites, such as LinkedIn and ZoomInfo, to bolster review efforts. Reading through a contact's overview page and their past roles can help in building rapport and increases their likelihood of participation. However, if no further information could be obtained about a business or the respondent, they were not excluded from the potential pool of interviews and were contacted as normal. This approach was first carried out in 2019, with approximately 5% of all interviews, while the approach was carried out on around 40% to 50% of all interviews between 2020 to 2023 tracking.

1.2.4. Sample selection

In total, 91,083 businesses were selected from the Dun and Bradstreet database in 2023. 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
Germany	6,000

Country	Total
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	3,269
Saudi Arabia	3,814
Total	91,083

As Table 1 shows, 6,000 records were drawn for each market in total except Nigeria and Saudi Arabia, for which 3,269 and 3,814 records were drawn, respectively. This reflects the size of the business universe in Nigeria and Saudi Arabia after removing businesses for which telephone contact and senior decision maker information was unavailable (the total size of the business universe in Nigeria and Saudi Arabia at the time of drawing the sample was 3,775 and 4,284, respectively).

In each market, the sample was stratified by turnover and sector prior to selection. A sample of businesses were selected in each market, representative of population data provided by Dun and Bradstreet, of all businesses on their database that were profit making, with at least 10 employees, and made at least $2,000,000 USD annual turnover. The population from which the sample was drawn based on these criteria is presented in 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 (%)	IN (N)	IN (%)	JP (N)	JP (%)
A - Agriculture, Forestry and Fishing	71	1%	110	2%	29	0%	105	2%	42	1%	66	1%	49	1%
B - Mining and Quarrying	34	1%	92	2%	68	1%	15	0%	14	0%	125	2%	5	0%
C - Manufacturing	1,522	25%	790	13%	2,985	50%	1185	20%	2,239	37%	1,388	23%	907	15%
D - Electricity, Gas, Steam and Aircon	45	1%	24	0%	80	1%	20	0%	71	1%	76	1%	20	0%
E - Water, Sewerage and Waste	30	1%	28	0%	34	1%	11	0%	63	1%	21	0%	52	1%
F - Construction	385	6%	597	10%	284	5%	810	14%	414	7%	396	7%	1,087	18%
G - Wholesale, Retail and Motor Repair	2,271	38%	1,706	28%	1,268	21%	1,811	30%	940	16%	2,513	42%	1,272	21%
H - Transport and Storage	399	7%	277	5%	205	3%	374	6%	250	4%	206	3%	391	7%
I - Accommodation and Food Service	59	1%	184	3%	64	1%	135	2%	47	1%	12	0%	127	2%
J - Information and Communication	102	2%	196	3%	139	2%	168	3%	215	4%	354	6%	219	4%
K - Finance and Insurance	148	2%	335	6%	156	3%	171	3%	521	9%	153	3%	141	2%
L - Real Estate	68	1%	190	3%	253	4%	81	1%	39	1%	65	1%	186	3%
M - Professional, Scientific & Technical	131	2%	452	8%	159	3%	414	7%	335	6%	208	3%	144	2%
N - Admin and Support	52	1%	29	0%	3	0%	89	1%	53	1%	40	1%	63	1%
P - Education	93	2%	99	2%	26	0%	72	1%	50	1%	85	1%	85	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.

Sector	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
Q - Health and Social Work	199	3%	312	5%	59	1%	239	4%	443	7%	74	1%	712	12%
R - Arts, Entertainment and Recreation	34	1%	130	2%	10	0%	36	1%	23	0%	35	1%	101	2%
S - Other Services	357	6%	449	7%	178	3%	264	4%	241	4%	183	3%	439	7%
Total	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Sector	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
A - Agriculture, Forestry and Fishing	199	3%	59	1%	8	0%	52	1%	122	2%	43	1%	93	2%
B - Mining and Quarrying	163	3%	41	1%	145	2%	51	1%	53	1%	13	0%	138	2%
C - Manufacturing	481	8%	2,545	42%	928	15%	901	15%	1,749	29%	2,619	44%	1,048	17%
D - Electricity, Gas, Steam and Aircon	0	0%	35	1%	15	0%	37	1%	27	0%	20	0%	40	1%
E - Water, Sewerage and Waste	3	0%	19	0%	12	0%	53	1%	34	1%	73	1%	38	1%
F - Construction	659	11%	354	6%	345	6%	631	11%	472	8%	791	13%	655	11%
G - Wholesale, Retail and Motor Repair	794	13%	2,079	35%	2,883	48%	1,317	22%	2,037	34%	1,024	17%	1,177	20%
H - Transport and Storage	38	1%	339	6%	443	7%	189	3%	369	6%	284	5%	280	5%
I - Accommodation and Food Service	198	3%	92	2%	100	2%	159	3%	63	1%	40	1%	310	5%
J - Information and Communication	76	1%	53	1%	208	3%	246	4%	156	3%	249	4%	235	4%
K - Finance and Insurance	1,098	18%	52	1%	203	3%	347	6%	158	3%	87	1%	221	4%

Sector	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
L - Real Estate	11	0%	12	0%	16	0%	137	2%	41	1%	66	1%	267	4%
M - Professional, Scientific & Technical	15	0%	102	2%	230	4%	499	8%	337	6%	204	3%	511	9%
N - Admin and Support	0	0%	0	0%	12	0%	36	1%	19	0%	21	0%	50	1%
P - Education	96	2%	20	0%	30	1%	306	5%	46	1%	55	1%	129	2%
Q - Health and Social Work	298	5%	59	1%	45	1%	630	11%	69	1%	134	2%	304	5%
R - Arts, Entertainment and Recreation	20	0%	12	0%	16	0%	83	1%	33	1%	49	1%	146	2%
S- Other Services	1851	31%	127	2%	361	6%	326	5%	215	4%	228	4%	358	6%
Total	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Sector	NG (N)	NG (%)	SA (N)	SA (%)	N	%
A - Agriculture, Forestry and Fishing	43	1%	17	0%	1,108	1%
B - Mining and Quarrying	685	21%	68	2%	1,710	2%
C - Manufacturing	462	14%	1,021	27%	22,770	25%
D - Electricity, Gas, Steam and Aircon	35	1%	13	0%	558	1%
E - Water, Sewerage and Waste	3	0%	13	0%	487	1%
F - Construction	180	6%	443	12%	8,503	9%
G - Wholesale, Retail and Motor Repair	603	18%	1,114	29%	2,4809	27%

Sector	NG (N)	NG (%)	SA (N)	SA (%)	N	%
H - Transport and Storage	176	5%	201	5%	4,421	5%
I - Accommodation and Food Service	42	1%	66	2%	1,698	2%
J - Information and Communication	123	4%	115	3%	2,854	3%
K - Finance and Insurance	168	5%	156	4%	4,115	5%
L - Real Estate	6	0%	8	0%	1,446	2%
M - Professional, Scientific & Technical	224	7%	236	6%	4,201	5%
N - Admin and Support	3	0%	5	0%	475	1%
P - Education	35	1%	10	0%	1,237	1%
Q - Health and Social Work	303	9%	48	1%	3,928	4%
R - Arts, Entertainment and Recreation	6	0%	5	0%	739	1%
S- Other Services	172	5%	275	7%	6,024	7%
Total	3,269	100%	3,814	100%	91,083	100 %

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

Business size	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
10 to 49	2,619	44%	4,547	76%	3,154	53%	4,485	75%	3,802	63%	4,525	75%	4,361	73%
50 to 249	2,610	44%	1,189	20%	2,179	36%	1,177	20%	1,468	24%	1,106	18%	1,348	22%
250 to 499	394	7%	130	2%	316	5%	172	3%	243	4%	178	3%	132	2%

Business size	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
500 to 999	214	4%	66	1%	196	3%	88	1%	257	4%	90	2%	89	1%
1000 to 1999	88	1%	33	1%	102	2%	50	1%	110	2%	57	1%	39	1%
2000 to 4999	52	1%	23	0%	32	1%	23	0%	78	1%	25	0%	19	0%
5000+	23	0%	12	0%	21	0%	5	0%	42	1%	19	0%	12	0%
Total	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Business size	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
10 to 49	5090	85%	3332	56%	3240	54%	3495	58%	1659	28%	4750	79%	3925	65%
50 to 249	829	14%	2083	35%	2127	35%	1849	31%	2810	47%	1042	17%	1338	22%
250 to 499	54	1%	357	6%	245	4%	287	5%	715	12%	106	2%	250	4%
500 to 999	16	0%	134	2%	150	3%	171	3%	378	6%	61	1%	140	2%
1000 to 1999	6	0%	58	1%	92	2%	89	1%	225	4%	29	0%	131	2%
2000 to 4999	5	0%	21	0%	63	1%	54	1%	122	2%	7	0%	117	2%
5000 and over	0	0%	15	0%	83	1%	55	1%	91	2%	5	0%	99	2%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

BUSINESS SIZE	NG (N)	NG (%)	SA (N)	SA (%)	N	%
10 to 49	1990	64%	1264	33%	56238	62 %

BUSINESS SIZE	NG (N)	NG (%)	SA (N)	SA (%)	N	%
50 to 249	1018	33%	1576	41%	25749	28 %
250 to 499	141	5%	347	9%	4067	4%
500 to 999	57	2%	259	7%	2366	3%
1000 to 1999	29	1%	167	4%	1305	1%
2000 to 4999	25	1%	126	3%	792	1%
5000 and over	9	0%	75	2%	566	1%
Total	3269	100%	3814	100%	91083	100 %

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

Annual turnover	BR (N)	BR (%)	CA (N)	CA (%)	CN (N)	CN (%)	FR (N)	FR (%)	DE (N)	DE (%)	IN (N)	IN (%)	JP (N)	JP (%)
$2,000,000 to $10,000,000	4,969	83%	4,294	72%	4,804	80%	4,070	68%	4,175	70%	5,217	87%	4,248	71%
$10,000,000 to $50,000,000	798	13%	1,325	22%	897	15%	1,429	24%	1,022	17%	637	11%	1,304	22%
$50,000,000 to $100,000,000	124	2%	182	3%	130	2%	244	4%	334	6%	73	1%	191	3%
$100,000,000 to $500,000,000	86	1%	156	3%	130	2%	212	4%	367	6%	58	1%	190	3%
$500,000,000 to $1,000,000,000	12	0%	14	0%	21	0%	26	0%	50	1%	8	0%	39	1%
$1,000,000,000 and over	11	0%	29	0%	18	0%	19	0%	52	1%	7	0%	28	0%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Annual turnover	ZA (N)	ZA (%)	TR (N)	TR (%)	AE (N)	AE (%)	US (N)	US (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)
$2,000,000 to $10,000,000	5,747	96%	4,084	68%	4,331	72%	3,952	66%	3,664	61%	4,268	71%	4,224	70%
$10,000,000 to $50,000,000	240	4%	1,583	26%	1,108	18%	1,447	24%	1,653	28%	1,407	23%	1,052	18%
$50,000,000 to $100,000,000	11	0%	185	3%	238	4%	249	4%	272	5%	151	3%	231	4%
$100,000,000 to $500,000,000	2	0%	123	2%	229	4%	256	4%	298	5%	147	2%	324	5%
$500,000,000 to $1,000,000,000	0	0%	14	0%	46	1%	38	1%	59	1%	13	0%	77	1%
$1,000,000,000 and over	0	0%	11	0%	48	1%	58	1%	54	1%	14	0%	92	2%
Total	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Annual turnover	NG (N)	NG (%)	SA (N)	SA (%)	N	%
$2,000,000 to $10,000,000	2,572	79%	2,469	65%	67,088	74%
$10,000,000 to $50,000,000	501	15%	813	21%	17,216	19%
$50,000,000 to $100,000,000	75	2%	175	5%	2865	3%
$100,000,000 to $500,000,000	74	2%	266	7%	2918	3%
$500,000,000 to $1,000,000,000	21	1%	35	1%	473	1%
$1,000,000,000 and over	26	1%	56	1%	523	1%
TOTAL	3,269	100%	3,814	100%	91,083	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)

Sector	TOTAL	Construction	Manufacturing	Other	Professional Services	Wholesale
Sample purchased	91,083	8,503	22,770	21,910	13,091	24,809
Unused sample	3110	472	678	696	457	807
Sent to number lookup	87,973	8,031	22,092	21,214	12,634	24,002
Successful lookup	87,973	8,031	22,092	21,214	12,634	24,002
Loaded to CATI	87,973	8,031	22,092	21,214	12,634	24,002
Total number of started surveys	42,398	4,054	12,963	6,771	6,412	12,198
Screened interviews	4,686	413	1,287	1,074	786	1,126
Partially completed interviews	663	67	208	129	77	182
Total completed interviews	4,004	345	1072	942	703	942

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

Business size	TOTAL	10 to49 employees	50 to 249 employees	250 to 499 employees	500 to 999 employees	1,000 to 1,999 employees	2,000 to 4,999 employees	Over 5,000 employees
Sample purchased	91,083	56,519	25,614	4,052	2,323	1271	778	526
Unused sample	3,110	1670	846	308	149	95	25	17
Sent to number lookup	87,973	54,849	24,768	3,744	2,174	1,176	753	509
Successful lookup	87,973	54,849	24,768	3,744	2,174	1,176	753	509
Loaded to CATI	87,973	54,849	24,768	3,744	2,174	1,176	753	509
Total number of started surveys	42,398	24,196	11,915	2,442	1,534	1041	689	581
Screened interviews	4,686	1,849	1,231	519	380	258	214	235
Partially completed interviews	663	346	192	45	33	21	17	9
Total completed interviews	4,023	1499	1032	473	344	235	196	225

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

Annual turnover	TOTAL	$2,000,000 to $10,000,000	$10,000,000 to $50,000,000	$50,000,000 to $100,000,000	$100,000,000 to $500,000,000	$500,000,000 to $1,000,000,000	$1,000,000,000 and over
Sample purchased	91,083	67088	17216	2865	2918	473	523
Unused sample	3,110	2646	403	19	22	11	9

Annual turnover	TOTAL	$2,000,000 to $10,000,000	$10,000,000 to $50,000,000	$50,000,000 to $100,000,000	$100,000,000 to $500,000,000	$500,000,000 to $1,000,000,000	$1,000,000,000 and over
Sent to number lookup	87,973	64,442	16,813	2,846	2,896	462	514
Successful lookup	87,973	64,442	16,813	2,846	2,896	462	514
Loaded to CATI	87,973	64,442	16,813	2,846	2,896	462	514
Total number of started surveys	42,398	26,836	10,887	2,061	1,893	386	335
Screened interviews	4,686	1,834	1,296	660	466	207	223
Partially completed interviews	663	328	200	88	19	17	11
Total completed interviews	4,023	1502	1091	567	442	190	212

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 65,017 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 2023. Overall, there was no consistent pattern in the differences between population counts between 2018 to 2019, 2019 to 2020, 2020 to 2021, 2021 to 2022, and 2022 to 2023. For example, some sectors saw a significant reduction of businesses from 2021 to 2022 but saw a significant increase in the same sector moving into 2023. This pattern was not consistent across sectors within the same market or among other markets.

Counts information was drawn from the same source (Dun and Bradstreet) with the same definitions (businesses with at least 10 employees and annual turnover of at least $2,000,000 USD) using the same SIC definitions for sector grouping across waves. Dun and Bradstreet have confirmed that there has been no change to the SICs over the past year. All international data has historically been, and is still currently, segmented by US 1987 SIC, which is a standard static classification system. Dun and Bradstreet have also confirmed that they regularly update and clean their databases throughout the year. The Dun and Bradstreet global marketable file contains details relating to active trading companies known to Dun and Bradstreet. The database is limited to companies whose records Dun and Bradstreet have been able to obtain and verify through public sources, direct contact, and third parties. This means that Dun and Bradstreet has been able to ascertain that a business is actively trading, its location, the industry sector, and in most cases its size. Database populations will, therefore, change over time both as a result of increases or decreases in real life as well as and due to database management. Table 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 2019 to 2020	FR 2020 to 2021	FR 2021 to 2022	FR 2022 to 2023	CN 2019 to 2020	CN 2020 to 2021	CN 2021 to 2022	CN 2022 to 2023	JP 2019 to 2020	JP 2020 to 2021	JP 2021 to 2022	JP 2022 to 2023
Manufacturing	46%	0%	-2%	-10%	45%	19%	47%	17%	67%	-2%	-43%	-21%
Construction	43%	3%	-3%	-13%	3%	118%	85%	14%	67%	2%	-23%	-15%
Wholesale, Retail and Motor Repair	44%	7%	-6%	-19%	49%	91%	57%	14%	63%	-2%	-34%	-10%
Professional services	-26%	8%	-5%	-23%	42%	106%	29%	8%	-60%	1%	-20%	-6%
Other services	180%	-1%	-15%	-14%	171%	48%	42%	13%	401%	0%	-18%	-5%
TOTAL	42%	3%	-8%	-16%	50%	54%	50%	14%	62%	0%	-26%	-10%

Sector	DE 2019 to 2020	DE 2020 to 2021	DE 2021 to 2022	DE 2022 to 2023	IN 2019 to 2020	IN 2020 to 2021	IN 2021 to 2022	IN 2022 to 2023	AE 2019 to 2020	AE 2020 to 2021	AE 2021 to 2022	AE 2022 to 2023
Manufacturing	-12%	7%	-13%	-46%	4%	15%	46%	32%	6%	43%	-34%	-33%
Construction	-11%	9%	-19%	-85%	-5%	7%	28%	15%	38%	52%	-46%	-50%
Wholesale, Retail and Motor Repair	-26%	8%	-20%	-80%	30%	124%	-1%	22%	-5%	180%	-33%	-62%

Sector	DE 2019 to 2020	DE 2020 to 2021	DE 2021 to 2022	DE 2022 to 2023	IN 2019 to 2020	IN 2020 to 2021	IN 2021 to 2022	IN 2022 to 2023	AE 2019 to 2020	AE 2020 to 2021	AE 2021 to 2022	AE 2022 to 2023
Professional services	-35%	8%	-14%	-59%	-36%	4%	35%	15%	-52%	40%	-28%	-29%
Other services	16%	7%	-20%	-72%	39%	14%	38%	31%	89%	72%	-45%	-57%
TOTAL	-15%	8%	-17%	-66%	4%	57%	15%	23%	7%	100%	-37%	-54%

Sector	US 2019 to 2020	US 2020 to 2021	US 2021 to 2022	US 2022 to 2023	BR 2019 to 2020	BR 2020 to 2021	BR 2021 to 2022	BR 2021 to 2023	ZA 2019 to 2020	ZA 2020 to 2021	ZA 2021 to 2022	ZA 2022 to 2023
Manufacturing	-68%	-3%	0%	0%	44%	-1%	21%	-4%	32%	19%	261%	111%
Construction	-70%	-4%	0%	0%	103%	-1%	55%	-9%	8%	9%	974%	106%
Wholesale, Retail and Motor Repair	-75%	-4%	-1%	-1%	50%	-1%	8%	-2%	16%	37%	161%	110%
Professional services	-75%	-6%	1%	2%	24%	3%	51%	-7%	-22%	155%	85%	59%
Other services	-49%	-6%	0%	3%	209%	1%	65%	-5%	68%	51%	648%	120%
TOTAL	-69%	-5%	0%	1%	60%	0%	25%	-4%	8%	75%	306%	103%

Sector	TR 2019 to 2020	TR 2020 to 2021	TR 2021 to 2022	TR 2022 to 2023	CA 2019 to 2020	CA 2020 to 2021	CA 2021 to 2022	CA 2022 to 2023	KR 2019 to 2020	KR 2020 to 2021	KR 2021 to 2022	KR 2022 to 2023
Manufacturing	-2%	0%	-18%	-45%	-	1%	0%	1%	-	-	29%	4%
Construction	-7%	-2%	-15%	-54%	-	1%	2%	2%	-	-	53%	5%
Wholesale, Retail and Motor Repair	-20%	0%	-15%	-46%	-	1%	2%	2%	-	-	19%	-7%
Professional services	-29%	3%	-19%	-56%	-	3%	2%	2%	-	-	9%	-13%
Other services	24%	0%	-15%	-53%	-	1%	3%	1%	-	-	-7%	10%
TOTAL	-8%	0%	-16%	-48%	-	2%	2%	1%	-	-	20%	1%

Sector	MX 2019 to 2020	MX 2020 to 2021	MX 2021 to 2022	MX 2022 to 2023	AU 2019 to 2020	AU 2020 to 2021	AU 2021 to 2022	AU 2022 to 2023	NG 2019 to 2020	NG 2020 to 2021	NG 2021 to 2022	NG 2022 to 2023
Manufacturing	-	-	9%	9%	-	-	-8%	-5%	-	-	-	0%
Construction	-	-	7%	5%	-	-	5%	-9%	-	-	-	9%
Wholesale, Retail and Motor Repair	-	-	30%	6%	-	-	-10%	-5%	-	-	-	15%
Professional services	-	-	19%	9%	-	-	-6%	-4%	-	-	-	-13%
Other services	-	-	26%	6%	-	-	-26%	-4%	-	-	-	5%
Total	-	-	20%	7%	-	-	-14%	-5%	-	-	-	3%

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

1.3. Questionnaire design

The questionnaire was developed in collaboration with DBT and was based on the 2022 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	91%	9%	-	-	-	-	-	-	-	-	-
South Africa	100%	-	-	-	-	-	-	-	-	-	-
Canada	96%	-	-	-	-	-	-	-	4%	-	-
France	6%	-	94%	-	-	-	-	-	-	-	-
Germany	11%	-	-	89%	-	-	-	-	-	-	-
China	-	-	-	-	100%	-	-	-	-	-	-

Country	English	Arabic	French	German	Mandarin	Japanese	Portuguese	Turkish	Canadian French	Spanish	Korean
Japan	-	-	-	-	-	100%	-	-	-	-	-
Brazil	-	-	-	-	-	-	100%	-	-	-	-
Turkey	-	-	-	-	-	-	-	100%	-	-	-
Mexico		-	-	-	-	-	-	-	-	100%	-
South Korea		-	-	-	-	-	-	-	-	-	100%
Australia	100%	-	-	-	-	-	-	-	-	-	-
Nigeria	100%	-	-	-	-	-	-	-	-	-	-
Saudi Arabia	94%	6%									

The average interview length was 24 minutes. The minimum length was 18 minutes and maximum length was 43 minutes. Table 10 below outlines the questionnaire length by market.

Table 10: Questionnaire length

	Overall	France	Germany	USA	South Africa	India	Japan	China	Brazil
Average length (minutes)	24	25	26	23	24	22	26	26	25

	UAE	Turkey	Canada	Mexico	South Korea	Australia	Nigeria	Saudi Arabia
Average length (minutes)	21	24	23	24	25	22	23	22

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 planned or do not plan to buy or invest internationally

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

- awareness of promotional activity (unprompted)
- buying and Investment activities in the UK and competitor countries
- key attributes associated with the UK and competitor countries

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

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

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 2023. 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 (2023)

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 11b: Rounding of screening criteria – equivalent to over $2,000,000 (2023)

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 2023 data. Please note that these conversions were based on the conversion rates from Google Finance on 05/07/2023. The exchange rates were as follows:

Table 12: Currency conversion rates (as of 5 July 2023)

Currency	China (CNY)	Japan (JPY)	France/ Germany (EUR)	UAE (AED)	India (INR)	Brazil (BRL)	South Africa (ZAR)
Units per USD	7.24	144.49	0.92	3.67	82.39	4.85	18.79

Currency	Turkey (TRY)	Mexico (MXN)	South Korea (KRW)	Canada (CAD)	Australia (AUD)	Nigeria (NGN)	Saudi Arabia (SAR)
Units per USD	26.09	17.00	1,303.97	1.33	1.50	773.50	3.75

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, 2,617 respondents (65%) were able to view the material online. In contrast, 1,387 respondents (35%) were read descriptions[3] 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.

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

Figure 1: Sample Images shown to respondents with access to the online web page



Figure 1 shows examples of GREAT campaign advertisements with taglines including 'Great Minds see beyond the binary', 'Great Investments are creating a sustainable future', and 'Great Inventions push everyone forward'.

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 partner[4] was used in all countries. The survey scripting was also carried out by our fieldwork partner and fully managed by Yonder's central research team. Interviewing teams were supplied with secure access to the script for their market.

Interviewers were briefed by supervisors prior to commencing fieldwork. All interviewing was conducted during standard working hours, unless otherwise requested. Where respondents were unable to participate at the point of first contact, follow-up appointments were booked as necessary. The overall fieldwork outcomes are summarised in table 13 below.

Table 13: Sample outcomes

Conversion Stage	TOTAL	FR	DE	US	ZA	IN	JP	CN	BR	AE	TR	CA	MX	KR	AU	NG	SA
Completed Interviews	4,004	248	252	252	255	246	248	250	252	253	252	249	250	250	249	250	248
Sample Called	87973	5841	5845	5813	5687	4746	5905	5916	5892	5891	5937	5724	5913	5953	5862	3267	3781

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

Conversion Stage	TOTAL	FR	DE	US	ZA	IN	JP	CN	BR	AE	TR	CA	MX	KR	AU	NG	SA
Soft Appointments	1120	87	76	79	22	56	102	72	54	87	191	54	108	32	71	17	12
Hard Appointments	305	12	19	32	9	18	18	49	12	19	26	18	8	16	9	32	8
Maximum call attempts	15409	987	738	1092	1022	1192	988	1092	876	1254	1364	644	1209	836	921	666	785
Screen outs (that is, ineligible)	12122	741	822	762	762	808	649	717	794	811	724	673	767	833	693	766	800
Refusals	25590	2119	1676	2636	1486	603	2183	2391	1982	1024	1261	1832	1872	2031	1872	622	792
Unused	3110	159	155	187	313	1254	95	84	108	109	63	276	87	47	138	2	33
Eligibility rate	25%	25%	24%	25%	25%	24%	28%	26%	24%	24%	26%	27%	25%	23%	27%	25%	24%
Co-operation rate	37%	32%	39%	28%	41%	64%	29%	29%	35%	51%	44%	33%	35%	35%	34%	62%	57%

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 2023 remained broadly in line with eligibility in 2022. Tables 14 to 16 showing screened, screen-out counts, and eligibility comparisons between 2020, 2021, 2022, and 2023 are included below. For the purpose of comparison, the tables below include all markets, except Mexico, South Korea, Australia, Nigeria, and Saudi Arabia (that is, 11 consistent markets).

Table 14: Screened

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

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

Table 15: Screen-outs

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

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 3 (2020)	Wave 3 (2020)	Wave 4 (2021)	Wave 4 (2021)	Wave 5 (2022)	Wave 5 (2022)	Wave 6 (2023)	Wave 6 (2023)
Total Sample Loaded	66,000	66,000	66,000	66,000	66,000	66,000	66,000	66,000
Manufacturing	1,255	1.9%	1,162	1.8%	773	1.2%	830	1.3%
Construction	136	0.2%	203	0.3%	297	0.5%	237	0.4%
Wholesale, Retail and Motor Repair	607	0.9%	537	0.8%	641	1.0%	557	0.8%
Professional services	544	0.8%	475	0.7%	480	0.7%	570	0.9%
Other services	231	0.4%	402	0.6%	569	0.9%	534	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 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

			Total	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
FR	w	N	248	81	18	58	41	50
FR	w	%	100%	33%	7%	24%	17%	20%
FR	u	N	248	65	25	64	37	57
FR	u	%	100%	26%	10%	26%	15%	23%
DE	w	N	252	61	19	67	59	46
DE	w	%	100%	24%	8%	27%	23%	18%
DE	u	N	252	82	13	46	59	52
DE	u	%	100%	33%	5%	18%	23%	21%
US	w	N	252	72	16	56	54	53
US	w	%	100%	29%	6%	22%	21%	21%
US	u	N	252	57	17	59	54	65
US	u	%	100%	23%	7%	23%	21%	26%
ZA	w	N	255	124	8	55	24	44
ZA	w	%	100%	49%	3%	22%	10%	17%

			Total	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
ZA	u	N	255	55	22	52	39	87
ZA	u	%	100%	22%	9%	20%	15%	34%
IN	w	N	246	106	29	32	44	35
IN	w	%	100%	43%	12%	13%	18%	14%
IN	u	N	246	69	27	66	43	41
IN	u	%	100%	28%	11%	27%	17%	17%
JP	w	N	247	112	14	62	39	19
JP	w	%	100%	45%	6%	25%	16%	8%
JP	u	N	248	71	25	65	32	55
JP	u	%	100%	29%	10%	26%	13%	22%
CN	w	N	250	52	9	53	70	66
CN	w	%	100%	21%	4%	21%	28%	26%
CN	u	N	250	80	17	55	50	48
CN	u	%	100%	32%	7%	22%	20%	19%
BR	w	N	252	63	34	42	56	57
BR	w	%	100%	25%	13%	17%	22%	22%
BR	u	N	252	67	22	71	35	57
BR	u	%	100%	27%	9%	28%	14%	23%
AE	w	N	252	53	36	53	58	52
AE	w	%	100%	21%	14%	21%	23%	21%
AE	u	N	253	48	24	84	39	58
AE	u	%	100%	19%	9%	33%	15%	23%
TR	w	N	253	41	40	32	79	61
TR	w	%	100%	16%	16%	12%	31%	24%
TR	u	N	252	83	25	63	28	53
TR	u	%	100%	33%	10%	25%	11%	21%
CA	w	N	249	74	19	53	49	55
CA	w	%	100%	30%	8%	21%	20%	22%
CA	u	N	249	53	20	66	49	61
CA	u	%	100%	21%	8%	27%	20%	24%
MX	w	N	250	67	23	35	66	59
MX	w	%	100%	27%	9%	14%	26%	24%
MX	u	N	250	77	18	57	46	52
MX	u	%	100%	31%	7%	23%	18%	21%
KR	w	N	250	49	10	15	89	86
KR	w	%	100%	19%	4%	6%	36%	34%
KR	u	N	250	83	18	27	57	65
KR	u	%	100%	33%	7%	11%	23%	26%
AU	w	N	249	100	15	67	25	42
AU	w	%	100%	40%	6%	27%	10%	17%

			Total	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
AU	u	N	249	70	20	57	40	62
AU	u	%	100%	28%	8%	23%	16%	25%
NG	w	N	250	64	25	46	57	58
NG	w	%	100%	26%	10%	18%	23%	23%
NG	u	N	250	49	19	49	49	84
NG	u	%	100%	20%	8%	20%	20%	34%
SA	w	N	247	57	36	45	63	46
SA	w	%	100%	23%	15%	18%	25%	19%
SA	u	N	248	63	33	61	46	45
SA	u	%	100%	25%	13%	25%	19%	18%

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.[5] The impact of weighting for each market is shown in table 18, along with the required ranges for different sample sizes and percentages associated with confidence intervals at the 95% confidence level. This means that if the survey were to be conducted 100 times, a finding of the same nature would be found on at least 95 occasions. For example, if 10% or 90% of a sample of 4,004 gives a particular answer, the chances are 95 in 100 that the 'true' value will fall within the range of plus or minus 1.0 percentage points from the sample results.

Table 18: Effective base sizes

	TOTAL (unweighted)	Effective base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total	4,004	3474	±1.0	±1.3	±1.5	±1.6	±1.7
USA	252	246	±3.7	±5.0	±5.7	±6.1	±6.2
France	248	241	±3.8	±5.1	±5.8	±6.2	±6.3
Germany	252	234	±3.8	±5.1	±5.9	±6.3	±6.4
China	250	224	±3.9	±5.2	±6.0	±6.4	±6.5
Japan	248	204	±4.1	±5.5	±6.3	±6.7	±6.9
UAE	253	228	±3.9	±5.2	±5.9	±6.4	±6.5
India	246	212	±4.0	±5.4	±6.2	±6.6	±6.7
Brazil	252	224	±3.9	±5.2	±6.0	±6.4	±6.5

[5] 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.

	TOTAL (unweighted)	Effective base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
South Africa	255	173	±4.5	±6.0	±6.8	±7.3	±7.5
Turkey	252	162	±4.6	±6.2	±7.1	±7.5	±7.7
Canada	249	238	±3.8	±5.1	±5.8	±6.2	±6.4
Mexico	250	231	±3.9	±5.2	±5.9	±6.3	±6.4
South Korea	250	210	±4.1	±5.4	±6.2	±6.6	±6.8
Australia	249	224	±3.9	±5.2	±6.0	±6.4	±6.5
Nigeria	250	235	±3.8	±5.1	±5.9	±6.3	±6.4
Saudi Arabia	248	237	±3.8	±5.1	±5.8	±6.2	±6.4

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 2023 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 $2,000,000 and at least 10 employees.

Table 19: Breakdown of respondents by size and turnover (unweighted)

Annual turnover (USD $)	N	%		Number of employees	N	%
$2,000,000 to $10,000,000	1502	38%		10 to 49	1499	37%

Annual turnover (USD $)	N	%		Number of employees	N	%
$10,000,000 to $50,000,000	1091	27%		50 to 249	1032	26%
$50,000,000 to $100,000,000	567	14%		250 to 499	473	12%
$100,000,000 to $500,000,000	447	11%		500 to 999	344	9%
$500,000,000 to $1,000,000,000	185	5%		1,000 to 1,999	235	6%
$1,000,000,000 and over	212	5%		2,000 to 4,999	196	5%
TOTAL	4004	100%		5,000 and over	225	6%
				TOTAL	4004	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)

Sector	N	%
A - Agriculture, Forestry, Fishing	64	2%
B - Mining, Quarrying	74	2%
C - Manufacturing	1072	27%
D - Electricity, Gas, Steam and Aircon	68	2%
E - Water, Sewerage, Waste	21	1%
F - Construction	345	9%
G - Wholesale, Retail, Motor Repair	942	24%
H - Transport/ Storage	253	6%
I - Accommodation/ Food Service	80	2%
J - Information and Communication	139	3%
K - Finance and Insurance	241	6%
L - Real Estate	53	1%
M - Professional, Scientific, Technical	250	6%
N - Admin and Support	21	1%
P - Education	48	1%
Q - Health and Social Work	94	2%
R - Arts/ Entertainment/ Recreation	27	1%

Sector	N	%
S - Other Services	212	5%
Total	4004	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: 16-market totals and 11-market totals. The trended 11-market totals represent the aggregated data of markets that were consistently present in the 2020, 2021, 2022, and 2023 surveys, respectively. That is to say, all markets are included in the aggregated scores except, Mexico, South Korea, Australia, Nigeria, and Saudi Arabia. In contrast, the 16-market aggregated results include all markets surveyed in 2023 only. Almost equal numbers of interviews have been conducted in each market and each is given equal weight within the overall total (this means all markets have been treated equally in the weighting scheme regardless of their number of eligible businesses). The 'total' therefore reflects views across these 11 or 16 markets.

In most research studies, there will be an element of cultural bias[6] 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, a majority of respondents were both. There were significantly more businesses that were currently only buying/would only consider buying (17%) compared to those that were currently only investing/would only consider investing (8%).

Within the overall sample for the 11 consistent markets in 2023, 1,394 respondents were classified as 'buyers' and asked questions relating to buying, whilst 1,363 were classified as 'investors' and

[6] Chris Menzies: International research Golden rules, making sense of international data

were asked questions relating to investment. For the overall 16 markets in 2023, the sample size for ‘buyers’ increased to 2,029 respondents, and for ‘investors’, this increased to 1,975.

Figure 2: Breakdown of respondents by international trading and investment activities – 11-market total (unweighted)

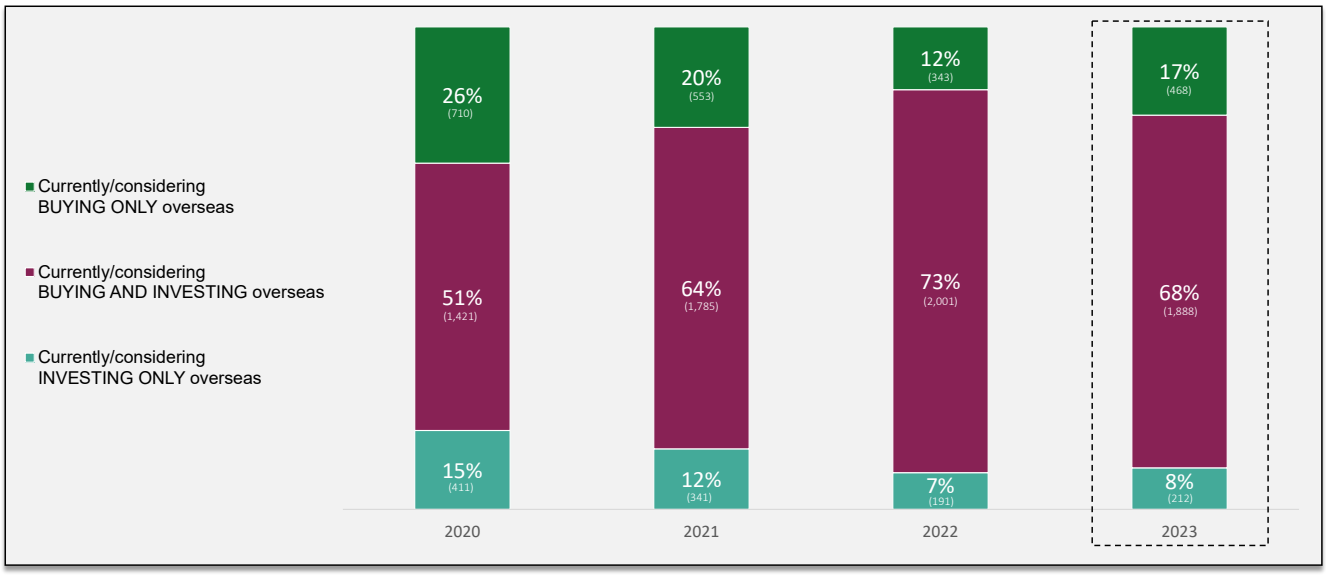

Figure 2 shows the proportion of businesses that are currently or considering buying ONLY overseas, businesses that are currently or considering investing ONLY overseas, and businesses that are currently or considering buying AND investing overseas. Figures from 2020 to 2023 are shown.

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 in 3 respondents accessed the internet to view campaign stimuli in 2023, 2022, 2021 and 2020 (66%, 64%, 66%, and 69% respectively), amongst the 11 consistent markets. Those without internet access were given a detailed description[7] of the promotional activity.

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

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

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

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

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 2023 are outlined below.

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

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

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

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

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

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

Subsequent to initial field checks, specified ‘other’ responses were reviewed by a dedicated coding specialist: open responses that could have been coded using the question’s pre-existing response frame were backcoded 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 or re-ordering to be made before end of fieldwork, enabling final data to be sent as soon as possible after fieldwork completion. Verbatims (specified ‘others’) were supplied as a separate Excel document since lengthy verbatim comments can become truncated in SPSS exports.

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

3. Appendix

3.1. Questionnaire

2023 DBT International Buyers and Investors Study

CATI VERSION

GATEKEEPER INTRODUCTION

I1 Good morning/afternoon. I am calling from [fieldwork partner name] in partnership with Yonder, an independent market research agency based in the UK. We are conducting a research study on behalf of the UK Government's Department for Business and Trade (DBT). The aim of the study is to research views of companies in your country about the United Kingdom.

INT: 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? That is, you are not driving a car, using any equipment or machinery or doing anything else that requires your focused attention?
PROG: SINGLE CODE ONLY

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

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

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 Business and Trade (DBT) 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

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 in the United Kingdom (that is England, Scotland, Wales and Northern Ireland)?

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

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

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

G: DUMMY VARIABLE FOR RADE: 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) AND S1b = (2 OR 3) AND 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]).
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?

EXACT NUMBER	_____
Don't know	X
If providing estimate (SINGLE CODE ONLY)	
[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	India (Indian Rupee, in	Brazil (BRL)	South Africa (ZAR)	Turkey (TRY)

					Dirham)	Crore)			
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 $1 bil	Over ¥7 bil	Over ￥145 bil	Over EUR 1 bil	Over AED 4 bil	Over INR 8,000 cr	Over BRL 5 bil	Over ZAR 20 bil	Over 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)	Saudi Arabia (SAR)
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 / 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	

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.

	GENERAL REJECTION:
1	No interest in doing so/is not what we do
	REASONS NOT TO IMPORT:
2	Do not think there will be a demand for any international products or services in their home country

25	Do not think there will be a demand for any international products or services in their home country
3	Buying from abroad does not make financial sense/can get things cheaper in own country
6	Do not have a trusted/ reliable distributor to facilitate foreign trade
8	Differences in quality standards/quality better in own country
9	Logistical problems/lack of infrastructure in target foreign markets
10	Prohibitive tariffs
14	Set up/operating costs too high
17	Lack of customers abroad/not enough demand for what we provide
	REASONS NOT TO INVEST:
11	Previous negative experience of foreign trade and investment
	CULTURAL/POLITICAL/GEOGRAPHICAL FACTORS:
5	Lack of language skills
4	Foreign regulatory regimes are too different/risky
7	Political risk
16	Cultural differences
15	Location of market (timezones/logistics)
21	Concerns around the war in Ukraine
	LACK OF KNOWLEDGE/RELATIONS:
12	Not enough knowledge of buying and investing/do not know where to obtain information
13	Lack of personal relationships/contacts overseas
	OTHER:
20	Disruption due to Covid-19
22	Burden of administration
23	Current inflation in other markets is prohibitive
18	Other
19	Don't know

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. How likely or unlikely is it that your organisation will buy or import products or services from companies based abroad in the future? Would you say you are….READ OUT
PROG/INT: SINGLE CODE ONLY

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
INT:	

PROG: ASK IF S2b = 1
S8. How likely or unlikely is it 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

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

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: ADD VAR FOR GFEST DBT 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

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
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 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

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 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

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
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
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	(INT:	(INT:	(INT:	(INT: DO NOT

	READ OUT) Don't know / refused	DO NOT READ OUT) Don't know / refused	DO NOT READ OUT) Don't know / refused	DO NOT READ OUT) Don't know / refused	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

- Nothing
- Up to £500,000
- £500,001 - £5,500,000
- £5,500,001 - £10,500,000
- £10,500,001 - £15,500,000
- £15,500,001- £20,000,000
- More than £20m
- Don't know
- 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.

	UK-SPECIFIC OBSTACLES:
4	Other countries provide better/faster products and services
5	Inefficient processes
6	Price is not competitive enough
7	Products/ services are not (widely) available
9	Credit facilities / credit rating criteria
10	Unfavourable exchange rates
11	Trade barriers / Requirement certifications
18	Brexit/UK not part of the EU/EEA
17	Not applicable /not attractive to our sector
21	UK trade policy makes buying/importing unattractive
22	Free Trade Agreement between the UK and my country not working well/too burdensome
23	No Free Trade Agreement between the UK and my country
24	Free Trade Agreement between the UK and my country is difficult to understand
	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

	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
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?

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 IF BUY – ALL THOSE WHO CODE 1-2 OR 4-5 AT QB3b
B3c. You mentioned that you were [PIPE IN CODE SELECTED AT Q3b] to buy or import products or services from companies based in the UK compared to 12 months ago. In your own words, please tell us why.

FOR QB3b: code 1-2(Display options 1-23 & 48, 49)
FOR QB3b: code 4-5(Display options 24-47 & 48, 49)

PROG: MULTICODE EXCEPT DON’T KNOW
INT: DO NOT READ OUT – PROBE RESPONSES IF UNCLEAR

	UK-SPECIFIC ATTRACTIONS:
1	Good / mature supply base
2	Price
3	Value for money
4	Quality/ good products/service/efficiency
5	Product availability
6	Expertise/ long history in the field
7	Good technology / Innovation
8	It is a stable business environment/economy/developed country/good place to do business
9	Favourable exchange rates
10	Brexit opportunities
11	Trading arrangements between the UK and my country

12	Existence of a Free Trade Agreement between the UK and my country
	COMPANY/HOME-COUNTRY RELATIONSHIP FACTORS:
13	Existing company / subsidiary in the UK
14	Presence of customers/Sufficient demand for products
15	Strong connection/ contact (including those who already work with the UK)
16	Funding
	AFFINITY/CULTURAL FIT:
17	Transparency of doing business
18	Trust/like the mentality of the people
19	Seriousness / good reputation
20	Geographic location
21	Similar time zone
22	Common language/ English language
	UK PUBLICITY:
23	Events with informative content
	UK-SPECIFIC OBSTACLES:
24	Other countries provide better/faster products and services
25	Inefficient processes
26	Price is not competitive enough
27	Products/ services are not (widely) available
28	Credit facilities / credit rating criteria
29	Unfavourable exchange rates
30	Trade barriers / Requirement certifications
31	Brexit/UK not part of the EU/EEA
32	Not applicable /not attractive to our sector
33	UK trade policy makes buying/importing unattractive
34	Free Trade Agreement between the UK and my country not working well/too burdensome
35	No Free Trade Agreement between the UK and my country
36	Free Trade Agreement between the UK and my country is difficult to understand
	PERCEIVED/POTENTIAL OBSTACLES:
37	No contact with (any company in) UK
38	Not aware of opportunities/ Have not considered UK sources yet
39	No promotion/information/not enough information on UK (and/or UK products or services)
40	Unsure about export tax issues / high taxes
	CULTURAL OBSTACLES:
41	Distance/ geographic location
42	Different cultures
43	Language barriers
	OTHER:
44	Environmental reasons
45	Covid-19 / coronavirus
46	Concerns around the war in Ukraine
47	Current inflation is prohibitive
48	Other (SPECIFY)
49	Don't know
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 49 ONWARDS…..

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

	IN DOMESTIC COUNTRY (WHERE RESPONDENT BASED):
2	Domestic country's chamber of commerce/trade association/industry body
3	Domestic country's government trade department/agency/embassy
8	Consultancies/Other private companies in domestic market
	IN TARGET COUNTRY:
4	Embassy/government of target country
13	Consultancies/Private companies in the target market
14	Target country's chamber of commerce/trade association/industry body
15	Target country's government trade department/agency/embassy
17	Target country's economic attaché
18	UK Embassy/government/DBT/UK Export Finance
19	UK trade association/industry body
	INTERNATIONAL ORGANISATIONS/SOURCES:
6	International trade association/industry body
	IN RESPONDENT'S OWN COMPANY:
9	Overseas office of the company
1	UK office of the company
5	Internal specialists within own company
	GENERAL SOURCES (LOCATION NOT SPECIFIED):
10	Banks
11	Export Credit Agencies
12	Personal networks/ existing contractual relationships/ Businesses community forum
7	Internet search for relevant companies
23	Shipping/freight companies
	OTHER:
16	Not our decision (We go according to the procurement policy)
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

	UK-SPECIFIC OBSTACLES:
4	Bureaucratic problems
27	Political reasons
28	Legal restrictions
5	High corporate tax rates/business rates, VAT, PAYE
6	High personal tax rates
8	Unfavourable exchange rate
10	Lack of skills among UK workforce
14	Negative experiences in the past
16	Poor quality of UK products/services
	PERCEIVED/POTENTIAL OBSTACLES:
1	Do not have (enough) information/ knowledge
2	Not enough demand for our goods/services
3	Too much competition already
7	Difficulty accessing finance
9	Difficult to enter the UK market / trade barriers
11	Lack of contacts/difficult to access business networks
12	Difficulty in obtaining visas
15	The risk of Brexit/lack of access to European Union
23	UK trade policy / Bilateral Investment Treaty makes investment unattractive
24	Free Trade Agreement between the UK and my country not working well/too burdensome
25	No Free Trade Agreement between the UK and my country
26	Free Trade Agreement between the UK and my country is difficult to understand
	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

	UK-SPECIFIC ATTRACTIONS:
3	Prestigious/recognised country/stable
6	Opportunity for expansion/growth of business operations
7	Existence of market for our product(s)/growing market
8	Price/competitiveness/operating costs
9	Favourable exchange rates
10	Good financial incentives/tax credits/legal environment
11	Contract/IP rights and protections
12	Good business environment/good business opportunities
13	Easy-to-do/set up business
14	Good transport infrastructure
16	Gateway to other markets/can serve as a hub (Europe, Commonwealth, North America)
17	Skilled workforce
19	UK reputation for innovation
28	Partnerships/ learning new practices from UK companies
26	Trading arrangements between the UK and my country
27	Existence of a Free Trade Agreement between the UK and my country
	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?

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 IF INVEST – ALL THOSE WHO CODE 1-2 OR 4-5 AT QB6a1
B6a2. You mentioned that you were [PIPE IN CODE SELECTED AT QB6a1] to expand or invest in the UK compared to 12 months ago. In your own words, please tell us why.

FOR QB6a1: code 1-2 (Display options 1-24 & 53, 54)
FOR: QB6a1: code 4-5(Display options 25-52 & 53, 54)

PROG: MULTICODE EXCEPT DON’T KNOW
INT: DO NOT READ OUT

	UK-SPECIFIC ATTRACTIONS:
1	Prestigious/recognised country/stable
2	Opportunity for expansion/growth of business operations
3	Existence of market for our product(s)/growing market
4	Price/competitiveness/operating costs
5	Favourable exchange rates
6	Good financial incentives/tax credits/legal environment
7	Contract/IP rights and protections
8	Good business environment/good business opportunities
9	Easy-to-do/set up business
10	Good transport infrastructure
11	Gateway to other markets/can serve as a hub (Europe, Commonwealth, North America)
12	Skilled workforce

13	UK reputation for innovation
14	Partnerships/ learning new practices from UK companies
15	Trading arrangements between the UK and my country
16	Existence of a Free Trade Agreement between the UK and my country
	COMPANY/HOME-COUNTRY RELATIONSHIP FACTORS:
17	Currently have an operation in the area/Already investing in the UK/know the market well
18	Previous experience/good existing relationship
19	Other businesses like mine/from my country are succeeding there
20	Ease of obtaining visas
	AFFINITY/CULTURAL FIT:
21	Common language/English language
22	Alignment of domestic and UK markets/regulations
23	Geographic location
24	Similar time zone
	UK-SPECIFIC OBSTACLES:
25	Bureaucratic problems
26	Political reasons
27	Legal restrictions
28	High corporate tax rates/business rates, VAT, PAYE
29	High personal tax rates
30	Unfavourable exchange rate
31	Lack of skills among UK workforce
32	Negative experiences in the past
33	Poor quality of UK products/services
	PERCEIVED/POTENTIAL OBSTACLES:
34	Do not have (enough) information/ knowledge
35	Not enough demand for our goods/services
36	Too much competition already
37	Difficulty accessing finance
38	Difficult to enter the UK market / trade barriers
39	Lack of contacts/difficult to access business networks
40	Difficulty in obtaining visas
41	The risk of Brexit/lack of access to European Union
42	UK trade policy / Bilateral Investment Treaty makes investment unattractive
43	Free Trade Agreement between the UK and my country not working well/too burdensome
44	No Free Trade Agreement between the UK and my country
45	Free Trade Agreement between the UK and my country is difficult to understand
	CULTURAL OBSTACLES:
46	Language issue
47	Physical safety/terror threat

48	Distance / geographic location
	OTHER:
49	Environmental reasons
50	Covid-19 / coronavirus
51	Concerns around the war in Ukraine
52	Current inflation is prohibitive
53	Other (SPECIFY)
54	Don't know

FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 26 ONWARDS…..

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 in other countries? PROBE: What others?
PROG: MULTICODE EXCEPT DON'T KNOW
INT: DO NOT READ OUT

	IN DOMESTIC COUNTRY (WHERE RESPONDENT BASED):
1	Accounting/Insurance firms/ Legal/law firms/other private companies in domestic market
4	Bank/venture capital/investment management firm in domestic market
7	Domestic country's chamber of commerce/trade association/industry body
8	Domestic country's government trade department/agency/embassy
	IN TARGET COUNTRY:
3	Bank/venture capital in target market
5	Target country's Chamber of Commerce
6	Target country's Embassy/government
9	Embassy/government/agency/other public sector body of target country
14	Private companies in the target country
15	Target country's chamber of commerce/ trade association/industry body
16	Target market's trade association/industry body
	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…

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 and creative products or services	
B	High quality products and services	
C	Competitive pricing	
D	Working within a high quality, reliable infrastructure	

E	
F	Open and welcoming to international business
J	
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

SPLIT SAMPLE TO ASK ABOUT THE UK AND GERMANY (50%) OR THE UK AND FRANCE (50%)

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	Score (1-10) France
A	Reputation for providing innovative and creative products or services			
B	High quality products and services			
C	Competitive pricing			
D	Working within a high quality, reliable infrastructure			
E				
F	Open and welcoming to international business			
J				
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 and creative products or services		
B	High quality products and services		
C	Competitive pricing		
D	Working within a high quality, reliable infrastructure		
E			
F	Open and welcoming to international business		
J			
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	Score (1-10) France
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 or ganisations 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)

	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. DBT, 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. ALL REFERENCES TO “GREAT” WITHIN THE CONTEXT OF THE CAMPAIGN SHOULD BE ASSIGNED TO CODE 4; GENERAL COMMENTS REMARKING THAT THE UK IS A GOOD (OR GREAT, WITHOUT MENTION OF THE CAMPAIGN) SHOULD BE ASSIGNED TO CODE 1 OR 2 - PROBE FURTHER IF UNCLEAR WHETHER IN REFERENCE TO INVESTMENT (CODE 1) OR TO TRADE (CODE 2).

1. UK/Britain is a good place in which to invest (non-specific)
2. UK/Britain is a good place to trade with (non-specific)
3. UK/Britain is ready to trade
4. UK/Britain is GREAT to do business with (INT: NOTE SPECIFIC CAPITALISATION OF ‘GREAT’)
5. UK/Britain is a good place for business collaboration
23. To see things differently, choose the UK/Britain

20. UK/Britain sees things differently
21. UK/Britain is a sustainable place to do business with
22. Great Trade opens doors
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 [URL redacted] 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 'To see things differently, choose the UK', or which includes phrases using the word GREAT to promote 'Great Britain' as a place to do business with?
INTERVIEWER: BE EXPLICIT ABOUT 'GREAT'. SPELL OUT IF NECESSARY ("G-R-E-A-T").
These advertisements, events or promotional items include the words Britain and Northern Ireland and part of the red, white and blue union flag. They may also have included images relating to UK business.

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

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

	PRINT PRESS AD:
8	Print media / advertising
	OTHER MEDIA AD:

11	TV
20	On posters, billboards or outdoor advertising digital screens
	SOCIAL MEDIA SITES:
15	Twitter
16	LinkedIn
22	Facebook
	OTHER ONLINE (NON-SPECIFIC):
12	Website / Online / Internet
13	Emails
	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 (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

	ONLINE:
1	Visited the GREAT website
18	Downloaded the '5 reasons to buy from the UK' 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 DBT's Investment Atlas
21	Used DBT's Find a Supplier
22	Contacted a potential UK supplier using DBT'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 DBT 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 DBT, 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. Bloomberg
2. CNBC
3. CNN
4. Wired
5. Business Insider
6. Reuters
7. The economist
8. MIT Tech Review
9. Nikkei
10. Other business media
11. Sector/industry specific publications/magazines
12. External consultancies/sources (KPMG, PWC etc)
13. Social media – LinkedIn
14. Social media – Facebook
15. Social media – Twitter
16. Social media – Weibo
17. Social media – WeChat
18. Social media -Other
19. Other online sources – search engines e.g. Google, Baidu, Soso.com
20. Television – business news
21. Trusted industry experts
23. Domestic trade shows/ events
24. International trade shows/ events
22. Suppliers' websites
23. Business contacts outside your organization
24. Recommendations from friends/colleagues
25. Domestic government
23. International government websites
26. Other countries' embassies
27. Bank/venture capitalist
28. Webinars / virtual events

29. Other (SPECIFY)
30. DK
31. 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. Bloomberg
2. CNBC
3. CNN
4. Wired
5. Business Insider
6. Reuters
7. The economist
8. MIT Tech Review
9. Nikkei
10. Other business media
11. Sector/industry specific publications/magazines
12. External consultancies/sources (KPMG, PWC etc.)
13. Social media – LinkedIn
14. Social media – Facebook
15. Social media – Twitter
16. Social media – Weibo
17. Social media – WeChat
18. Social media- Other
19. Other online sources – search engines e.g. Google, Baidu, Soso.com
20. Television – business news
21. Trusted industry experts
23. Domestic trade shows/ events
24. International trade shows/ events
22. Suppliers' websites
23. Business contacts outside your organization
24. Recommendations from friends/colleagues
25. Domestic government
25. International government websites
26. Other countries' embassies
27. Bank/venture capitalist
28. Webinars / virtual events
29. Other (SPECIFY)
30. DK
31. 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						
Free Trade Agreements make it easy to do business internationally						

(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						
Free Trade Agreements make it easy to do business internationally						

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, AUSTRALIA

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.

PROG: IF YES IN FG2A
FG2A1. You said you were aware of the Free Trade Agreement between [RESPONDENT’S COUNTRY] and the UK. How much do you know about the Free Trade Agreement between [RESPONDENT’S COUNTRY] and the UK?

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

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

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?

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 TURKEY

FG2Ba. There is now a Free Trade Agreement between the UK and [RESPONDENT'S COUNTRY] in place. Previously, this was covered by the Customs Arrangement 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?

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 AUSTRALIA

FG4B. There is now a Free Trade Agreement between the UK and [RESPONDENT'S COUNTRY] in place. Previously, trade between the UK and [RESPONDENT'S COUNTRY] was on World Trade Organisation terms. Would you say that the UK Free Trade Agreement has made you more or less likely to do any of the following, or has it made no difference? Please think about reasons specifically relating to the trade agreement rather than about doing business with the UK in general.
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

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

FG2B1. IF MORE LIKELY: You said you are more likely to [pipe answer from FG2B/FG2Ba/FG4B] due to the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. Can I ask why you say that?
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT – PROBE IF RESPONDENTS GIVE REASONS THAT DON'T CLEARLY RELATE TO THE FTA

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

FG2B2. IF LESS LIKELY: You said you are less likely to [pipe answer from FG2B/FG2Ba/FG4B] due to the Free Trade Agreement between [RESPONDENT'S COUNTRY] and the UK. Can I ask why you say that?
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 / Customs Arrangement / WTO terms
7. Reduced supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared to the EU Free Trade Agreement / Customs Arrangement / WTO terms
8. Worse processes around intellectual property
9. Other (Please specify)
10. Don't know

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

FG3A. Would a Free Trade Agreement between your country and the UK make you more or less likely to do any of the following, or make no difference? Please think about reasons specifically relating to the trade agreement rather than about doing business with the UK in general.
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?

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 FG3A] 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 would be a more attractive market as a result of the Free Trade Agreement
5. Business confidence/certainty would increase
6. New/more/better opportunities created by the UK Free Trade Agreement
7. Increased supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement
8. Improved processes around intellectual property
9. Other (Please specify)
10. Don’t know

FG3A2. IF LESS LIKELY: You said you would be less likely to [pipe answer from FG3A] 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 would be a less attractive market as a result of the Free Trade Agreement
5. Business confidence/certainty would reduce
6. Worse/fewer opportunities created by the UK Free Trade Agreement
7. Reduced supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement
8. Worse processes around intellectual property
9. Other (Please specify)
10. Don't know

SECTION H: Investment Transformation Programme

PROG: ASK IF LIKELY TO INVEST IN THE UK

PROG: B6_A CODES 8-10 (LIKELY TO INVEST IN THE UK

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
H1b. Government-led investment promotion agencies may provide investment opportunities, known as propositions, to foreign investors. This proposition is typically aligned to strategic governmental objectives and outlines specific business opportunities for prospective investors.

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

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

PROG: ASK IF INVEST
H2a. Please tell me how important you would rate each of the following factors when it comes to making decisions about whether to expand operations or invest in the UK. Please use a scale of 1 to 10, where 1 is not important at all and 10 is absolutely essential.

1. The financial incentives offered, for example grants or subsidies
2. The availability of tailored individual investment support
3. Introductions to the wider UK business network ahead of investing
4. Being directly approached by the UK Government

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

THANK AND CLOSE

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