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Business, Innovation,
Science and Trade

International Traders and Investors Study 2021

Technical report

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1. Methodology note

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

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

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

1.1. Objectives

The core responsibilities for the Department for International Trade (DIT) include developing new trade and investment policies to promote UK businesses globally and providing support for UK businesses who export whilst also facilitating inward and outward investment.

The GREAT Ready To Trade (RTT) campaign, launched in 2020, served as a platform to promote several government ambitions under the theme of international trade and global Britain. These are at the heart of the Export Strategy, the Single Departmental Plan 2020/21 (DIT), and the Industrial Strategy (Department for Business Energy and Industrial Strategy, also known as BEIS). It was rebranded as the GREAT Global Trade (GTT) campaign in 2022.

The key research objectives of this study were to:

- understand international perceptions of the UK as a place to trade with and/or invest in and track changes over time
- quantify buying/investment behaviour following a period of campaign activity
- assess the relative effectiveness of the different channels and messages of the campaign
- measure reactions to the campaign and identify what the lessons are for the next phases of the campaign

To meet these objectives, Yonder conducted 3,528 interviews with businesses that have the potential to trade with and/or invest in other countries. Fieldwork took place in 14 markets: France, Germany, United States of America (USA), Japan, China, India, United Arab Emirates (UAE), South Africa, Brazil, Turkey, Canada, Mexico, South Korea, and Australia. The survey was conducted using CATI (Computer Assisted Telephone Interviewing) by our fieldwork partner, between 8th October 2020 and 3rd February 2021.

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

1.2. Sampling

1.2.1. Sampling population

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

- profit making organisations with an annual turnover of at least $2,000,000; 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, trade and/or invest internationally in the future

Businesses were selected for inclusion in the sample if they met criteria 1 and 2 (this information was included in the sample frame). Interviewers also verified this information at the start of the interview. Businesses were screened in the interview on the third criteria, of which outcomes are detailed in section 1.2.4. 'Sample selection'.

1.2.2. Sampling frame

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

1.2.3. Sample design

This study is not intended to be a representative survey of all businesses within the target markets. In part, this is because there are no known business databases that fully reflect the business landscape of each of the markets targeted in this study. Another reason for this is the prohibitive resource that would be needed to collect a population representative sample for each market. Instead, this study is designed to be representative of businesses which met the 3 eligibility criteria above to be consistent over the 4 years (2018 to 2021).

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

2020 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 2020. As the incidence of businesses that had previously or were likely to trade and/or invest internationally varied considerably by sector, size and market, it was not possible to set precise quotas by turnover and sector. Instead, the quotas acted to ensure that the sectoral profile of the businesses that were contacted was representative of the sectoral make-up of the Dun and Bradstreet sample frame for the key markets. Businesses were then asked several screening questions to identify whether they met criterion 3 and were therefore eligible to take part in the survey. This process is outlined in more detail in the following sections.

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

Prior to contacting potential respondents, interviewers reviewed online executive profiles for additional information available about each record. In some instances, searches were run through websites like LinkedIn and ZoomInfo to bolster review efforts. Reading through a contact's overview page and their past roles can help in building rapport and increases their likelihood of participation. However, if no further information could be obtained about a business or the respondent, they were not excluded from the potential pool of interviews and were contacted as normal. This approach was first carried out in 2019, with approximately 5% of all interviews, while in 2020 and 2021, the approach was carried out on around 40% to 50% of all interviews.

1.2.4. Sample selection

In total, 84,000 businesses were selected from the Dun and Bradstreet database in 2021. 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
France	6,000
Germany	6,000
United States of America (USA)	6,000

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

COUNTRY	TOTAL
South Africa	6,000
India	6,000
Japan	6,000
China	6,000
Brazil	6,000
United Arab Emirates (UAE)	6,000
Turkey	6,000
Canada	6,000
Mexico	6,000
South Korea	6,000
Australia	6,000
TOTAL	84,000

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 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	FR (N)	FR (%)	DE (N)	DE (%)	US (N)	US (%)	ZA (N)	ZA (%)	IN (N)	IN (%)
A - Agriculture, Forestry and Fishing	116	2%	92	2%	80	1%	465	8%	85	1%
B - Mining and Quarrying	18	0%	18	0%	46	1%	157	3%	118	2%
C - Manufacturing	1,035	17%	1,460	24%	957	16%	589	10%	1,329	22%
D - Electricity, Gas, Steam and Aircon	17	0%	59	1%	34	1%	17	0%	68	1%
E - Water, Sewerage and Waste	11	0%	65	1%	37	1%	8	0%	10	0%
F - Construction	809	13%	634	11%	649	11%	553	9%	434	7%
G - Wholesale, Retail and Motor Repair	1,842	31%	1,235	21%	1381	23%	1,330	22%	2,383	40%
H - Transport and Storage	379	6%	374	6%	233	4%	131	2%	280	5%
I - Accommodation and Food Service	274	5%	108	2%	145	2%	224	4%	15	0%
J - Information and Communication	164	3%	224	4%	249	4%	118	2%	407	7%
K - Finance and Insurance	219	4%	250	4%	371	6%	1,431	24%	155	3%
L - Real Estate	90	2%	87	1%	125	2%	49	1%	65	1%
M - Professional, Scientific and Technical	369	6%	463	8%	490	8%	234	4%	218	4%
N - Admin and Support	60	1%	75	1%	28	0%	3	0%	40	1%
P - Education	39	1%	40	1%	249	4%	71	1%	76	1%
Q - Health and Social Work	205	3%	396	7%	538	9%	161	3%	102	2%
R - Arts, Entertainment and Recreation	53	1%	82	1%	79	1%	39	1%	20	0%
S- Other Services	300	5%	338	6%	309	5%	420	7%	195	3%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

[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	JP (N)	JP (%)	CN (N)	CN (%)	BR (N)	BR (%)	AE (N)	AE (%)	TR (N)	TR (%)
A - Agriculture, Forestry and Fishing	49	1%	41	1%	67	1%	23	0%	69	1%
B - Mining and Quarrying	13	0%	83	1%	49	1%	386	6%	51	1%
C - Manufacturing	1,228	20%	2834	47%	1,356	23%	826	14%	2,436	41%
D - Electricity, Gas, Steam and Aircon	9	0%	85	1%	26	0%	13	0%	54	1%
E - Water, Sewerage and Waste	67	1%	37	1%	18	0%	14	0%	9	0%
F - Construction	949	16%	322	5%	360	6%	435	7%	397	7%
G - Wholesale, Retail and Motor Repair	1,329	22%	1121	19%	2,603	43%	2,515	42%	1,997	33%
H - Transport and Storage	432	7%	171	3%	353	6%	336	6%	324	5%
I - Accommodation and Food Service	130	2%	48	1%	59	1%	130	2%	147	2%
J - Information and Communication	217	4%	183	3%	98	2%	175	3%	82	1%
K - Finance and Insurance	94	2%	176	3%	186	3%	274	5%	79	1%
L - Real Estate	110	2%	280	5%	84	1%	60	1%	11	0%
M - Professional, Scientific & Technical	138	2%	224	4%	158	3%	331	6%	124	2%
N - Admin and Support	45	1%	7	0%	47	1%	22	0%	0	0%
P - Education	86	1%	128	2%	77	1%	34	1%	20	0%
Q - Health and Social Work	533	9%	87	1%	160	3%	49	1%	73	1%
R - Arts, Entertainment and Recreation	117	2%	17	0%	30	1%	29	0%	14	0%
S- Other Services	454	8%	156	3%	269	4%	348	6%	113	2%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Sector	CA (N)	CA (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)	(N)	(%)
A - Agriculture, Forestry and Fishing	107	2%	124	2%	40	1%	104	2%	1,462	2%
B - Mining and Quarrying	118	2%	61	1%	11	0%	80	1%	1,209	1%
C - Manufacturing	818	14%	1,903	32%	2,355	39%	817	14%	19,943	24%
D - Electricity, Gas, Steam and Aircon	28	0%	45	1%	17	0%	13	0%	485	1%
E - Water, Sewerage and Waste	32	1%	21	0%	38	1%	42	1%	409	0%
F - Construction	587	10%	497	8%	603	10%	469	8%	7,698	9%
G - Wholesale, Retail and Motor Repair	1,622	27%	1,897	32%	1,132	19%	1,061	18%	23,448	28%
H - Transport and Storage	280	5%	388	6%	223	4%	226	4%	4,130	5%
I - Accommodation and Food Service	211	4%	49	1%	36	1%	401	7%	1,977	2%
J - Information and Communication	259	4%	142	2%	254	4%	173	3%	2,745	3%
K - Finance and Insurance	331	6%	161	3%	163	3%	243	4%	4,133	5%
L - Real Estate	141	2%	36	1%	69	1%	175	3%	1,382	2%
M - Professional, Scientific and Technical	454	8%	280	5%	299	5%	576	10%	4,358	5%
N - Admin and Support	28	0%	37	1%	46	1%	72	1%	510	1%
P - Education	103	2%	41	1%	159	3%	485	8%	1,608	2%
Q - Health and Social Work	312	5%	45	1%	248	4%	497	8%	3,406	4%
R - Arts, Entertainment and Recreation	106	2%	32	1%	57	1%	173	3%	848	1%
S- Other Services	463	8%	241	4%	250	4%	393	7%	4,249	5%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	84,000	100%

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

Number of Employees	FR (N)	FR (%)	DE (N)	DE (%)	US (N)	US (%)	ZA (N)	ZA (%)	IN (N)	IN (%)
10 to 49	4,402	73%	3,557	59%	3,462	58%	4,268	71%	4,470	75%
50 to 249	1,281	21%	1,870	31%	1,849	31%	1,437	24%	1,157	19%
250 to 499	182	3%	267	4%	287	5%	171	3%	169	3%
500 to 999	80	1%	157	3%	176	3%	68	1%	111	2%
1,000 to 1,999	28	0%	80	1%	116	2%	25	0%	47	1%
2,000 to 4,999	22	0%	44	1%	56	1%	16	0%	28	0%
5,000 and over	5	0%	25	0%	54	1%	15	0%	18	0%

Number of Employees	FR (N)	FR (%)	DE (N)	DE (%)	US (N)	US (%)	ZA (N)	ZA (%)	IN (N)	IN (%)
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Number of Employees	JP (N)	JP (%)	CN (N)	CN (%)	BR (N)	BR (%)	AE (N)	AE (%)	TR (N)	TR (%)
10 to 49	4,153	69%	2,380	40%	2,839	47%	2,912	49%	3,003	50%
50 to 249	1,530	26%	2,582	43%	2,438	41%	2,111	35%	2,138	36%
250 to 499	166	3%	450	8%	369	6%	298	5%	474	8%
500 to 999	74	1%	293	5%	188	3%	211	4%	211	4%
1,000 to 1,999	38	1%	183	3%	85	1%	143	2%	101	2%
2,000 to 4,999	29	0%	73	1%	60	1%	124	2%	42	1%
5,000 and over	10	0%	39	1%	21	0%	201	3%	31	1%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Number of Employees	CA (N)	CA (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)	(N)	(%)
10 to 49	4,461	74%	1,508	25%	4,529	75%	4,136	69%	50,080	60%
50 to 249	1,232	21%	2,756	46%	1,187	20%	1,249	21%	24,817	30%
250 to 499	156	3%	788	13%	139	2%	185	3%	4,101	5%
500 to 999	83	1%	418	7%	89	1%	130	2%	2,289	3%
1,000 to 1,999	30	1%	231	4%	27	0%	127	2%	1,261	2%
2,000 to 4,999	24	0%	156	3%	13	0%	76	1%	763	1%
5,000 and over	14	0%	143	2%	16	0%	97	2%	689	1%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	84,000	100%

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

Annual Turnover	FR (N)	FR (%)	DE (N)	DE (%)	US (N)	US (%)	ZA (N)	ZA (%)	IN (N)	IN (%)
$2,000,000 to $10,000,000	4,186	70%	4,055	68%	3,974	66%	4,985	83%	5,167	86%
$10,000,000 to $50,000,000	1,358	23%	1,350	23%	1,429	24%	837	14%	656	11%
$50,000,000 to $100,000,000	226	4%	269	4%	253	4%	100	2%	84	1%
$100,000,000 to $500,000,000	196	3%	243	4%	247	4%	61	1%	75	1%
$500,000,000 to $1,000,000,000	19	0%	48	1%	39	1%	5	0%	8	0%
$1,000,000,000 and over	15	0%	35	1%	58	1%	12	0%	10	0%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Annual Turnover	JP (N)	JP (%)	CN (N)	CN (%)	BR (N)	BR (%)	AE (N)	AE (%)	TR (N)	TR (%)
$2,000,000 to $10,000,000	4,020	67%	4,553	76%	4,911	82%	3,565	59%	3,588	60%
$10,000,000 to $50,000,000	1,459	24%	1,078	18%	857	14%	1,477	25%	1,888	31%
$50,000,000 to $100,000,000	259	4%	156	3%	106	2%	340	6%	260	4%
$100,000,000 to $500,000,000	202	3%	153	3%	104	2%	396	7%	219	4%
$500,000,000 to $1,000,000,000	24	0%	35	1%	13	0%	86	1%	21	0%
$1,000,000,000 and over	36	1%	25	0%	9	0%	136	2%	24	0%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	6,000	100%

Annual Turnover	CA (N)	CA (%)	MX (N)	MX (%)	KR (N)	KR (%)	AU (N)	AU (%)	(N)	(%)
$2,000,000 to $10,000,000	4,360	73%	3,456	58%	4,075	68%	4,462	74%	59357	71%
$10,000,000 to $50,000,000	1,296	22%	1,753	29%	1,436	24%	934	16%	17808	21%
$50,000,000 to $100,000,000	153	3%	316	5%	226	4%	147	2%	2895	3%
$100,000,000 to $500,000,000	153	3%	325	5%	207	3%	248	4%	2829	3%
$500,000,000 to $1,000,000,000	18	0%	67	1%	27	0%	76	1%	486	1%
$1,000,000,000 and over	20	0%	83	1%	29	0%	133	2%	625	1%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%	84,000	100%

The eligibility rate for each sector (within each country) was closely monitored throughout fieldwork, and the target number of interviews adjusted to reflect the eligibility rate in the field. This process was repeated for the different sectors and the target for each sector was scaled to ensure that the total number of interviews met the overall target of 250 interviews per market. Conversion rates of the total loaded sample are shown below by sector (Table 5), business size (Table 6), and annual turnover (Table 7), followed by definitions of each of the conversion stages. Further information on final sample outcomes can be seen in Table 13.

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

Conversion Stage	TOTAL	Construction	Manufacturing	Other	Professional Services	Wholesale
Sample purchased	84,000	7,698	19,943	19,783	13,128	23,448
Unused sample	1297	67	209	423	192	406
Sent to number lookup	82,703	7,631	19,734	19,360	12,936	23,042
Successful lookup	82,703	7,631	19,734	19,360	12,936	23,042
Loaded to CATI	82,703	7,631	19,734	19,360	12,936	23,042
Total number of started surveys	31,355	2,654	12,097	4,574	4,498	7,532
Screened interviews	4,080	318	1,262	804	733	963
Partially completed interviews	552	42	187	78	102	143
Total completed interviews	3,528	276	1075	726	631	820

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

Conversion Stage	TOTAL	10 to 49 employees	50 to 249 employees	250 to 499 employees	500 to 999 employees	1,000 to 1,999 employees	2,000 to 4,999 employees	Over 5,000 employees
Sample purchased	84,000	50,080	24,817	4,101	2,289	1261	763	689
Unused sample	1297	821	414	61	0	0	1	0
Sent to number lookup	82,703	49,259	24,403	4,039	2,289	1,261	763	689
Successful lookup	82,703	49,259	24,403	4,039	2,289	1,261	763	689
Loaded to CATI	82,703	49,259	24,403	4,039	2,289	1,261	763	689
Total number of started surveys	31,355	16,394	9,520	2,207	1,582	773	476	403
Screened interviews	4,080	1,509	1164	513	377	204	166	147

Conversion Stage	TOTAL	10 to 49 employees	50 to 249 employees	250 to 499 employees	500 to 999 employees	1,000 to 1,999 employees	2,000 to 4,999 employees	Over 5,000 employees
Partially completed interviews	552	256	176	62	27	9	12	10
Total completed interviews	3,528	1253	988	451	350	195	154	137

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

Conversion Stage	TOTAL	$2,000,000 to $10,000,000	$10,000,000 to $50,000,000	$50,000,000 to $100,000,000	$100,000,000 to $500,000,000	$500,000,000 to $1,000,000,000	$1,000,000,000 and over
Sample purchased	84,000	59,357	17,808	2,895	2,829	486	625
Unused sample	1297	778	498	12	8	1	0
Sent to number lookup	82,703	58,579	17,310	2,883	2,820	486	625
Successful lookup	82,703	58,579	17,310	2,883	2,820	486	625
Loaded to CATI	82,703	58,579	17,310	2,883	2,820	486	625
Total number of started surveys	31,355	19,016	7,987	2,019	1,654	307	372
Screened interviews	4,080	1,374	1,320	571	487	186	142
Partially completed interviews	552	219	204	61	48	17	29
Total completed interviews	3,528	1181	1116	510	439	169	113

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 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 successfully looked up

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

Counts information was drawn from the same source (Dun and Bradstreet) with the same definitions (Businesses with at least 10 employees and annual turnover of at least $2,000,000 USD) using the same SIC definitions for sector grouping across waves. Dun and Bradstreet have confirmed that there has been no change to the SICs over the past year. All international data has historically and is still currently segmented by US 1987 SIC, which is a standard static classification system. Dun and Bradstreet have also confirmed that they regularly update and purge their databases throughout the year. The Dun and Bradstreet global marketable file contains details relating to active trading companies known to Dun and Bradstreet. The database is limited to companies whose records Dun and Bradstreet have been able to obtain and verify through public sources, direct contact, and third parties. This means, Dun and Bradstreet has been able to ascertain that a business is actively trading, its location, the industry sector, and in most cases its size. Database populations will therefore change over time both as a result of increases or decreases in real life as well as and due to database management. Table 8 below includes the percentage change in population counts year-on-year.

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

Sector	FR 2018 to 2019	FR 2019 to 2020	FR 2020 to 2021	CN 2018 to 2019	CN 2019 to 2020	CN 2020 to 2021	JP 2018 to 2019	JP 2019 to 2020	JP 2020 to 2021	DE 2018 to 2019	DE 2019 to 2020	DE 2020 to 2021
Manufacturing	-34%	46%	0%	318%	45%	19%	-47%	67%	-2%	12%	-12%	7%
Construction	-27%	43%	3%	770%	3%	118%	-39%	67%	2%	38%	-11%	9%
Wholesale, Retail and Motor Repair	-34%	44%	7%	193%	49%	91%	-24%	63%	-2%	33%	-26%	8%
Professional services	10%	-26%	8%	187%	42%	106%	31%	-60%	1%	25%	-35%	8%
Other services	-14%	180%	-1%	293%	171%	48%	-22%	401%	0%	154%	16%	7%
TOTAL	-21%	42%	3%	296%	50%	54%	-19%	62%	0%	38%	-15%	8%

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

Sector	ZA 2018 to 2019	ZA 2019 to 2020	ZA 2020 to 2021	TR 2018 to 2019	TR 2019 to 2020	TR 2020 to 2021	CA 2018 to 2019	CA 2019 to 2020	CA 2020 to 2021
Manufacturing	-	32%	19%	-	-2%	0%	-	-	1%
Construction	-	8%	9%	-	-7%	-2%	-	-	1%
Wholesale, Retail and Motor Repair	-	16%	37%	-	-20%	0%	-	-	1%
Professional services	-	-22%	155%	-	-29%	3%	-	-	3%
Other services	-	68%	51%	-	24%	0%	-	-	1%
TOTAL	-	8%	75%	-	-8%	0%	-	-	2%

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

1.3. Questionnaire design

The questionnaire was developed in collaboration with DIT and was based on the 2019 ITIS 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 partner in their local languages. Interviewers received written briefing notes, a copy of the survey questionnaire, and a letter to send to respondents providing more information about the survey.

Table 9: Proportion of languages used in interviews across markets

COUNTRY	English	Arabic	French	German	Mandarin	Japanese	Portuguese	Turkish	Canadian French	Spanish	Korean
INDIA	100%	-	-	-	-	-	-	-	-	-	-
USA	100%	-	-	-	-	-	-	-	-	-	-
UAE	88%	12%	-	-	-	-	-	-	-	-	-
S. AFRICA	100%	-	-	-	-	-	-	-	-	-	-
CANADA	95%	-	-	-	-	-	-	-	5%	-	-
FRANCE	4%	-	96%	-	-	-	-	-	-	-	-
GERMANY	8%	-	-	92%	-	-	-	-	-	-	-
CHINA	-	-	-	-	100%	-	-	-	-	-	-
JAPAN	-	-	-	-	-	100%	-	-	-	-	-
BRAZIL	-	-	-	-	-	-	100%	-	-	-	-
TURKEY	-	-	-	-	-	-	-	100%	-	-	-
MEXICO	-	-	-	-	-	-	-	-	-	100%	-
S. KOREA	-	-	-	-	-	-	-	-	-	-	100%
AUSTRALIA	100%	-	-	-	-	-	-	-	-	-	-

The average interview length was 24 mins. 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
Average length (minutes)	23	27	26	21	23	22

	Japan	China	Brazil	UAE	Turkey	Canada
Average length (minutes)	23	28	24	22	25	21

	Mexico	South Korea	Australia
Average length (minutes)	25	26	21

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 (or equivalent in local currency)
- businesses who have not or do not plan to trade or invest internationally

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

- awareness of promotional activity (unprompted)
- trade and Investment activities in the UK and competitor countries
- key attributes associated with the UK and competitor countries
- campaign awareness (prompted)
- awareness of DIT and key information sources
- knowledge and impact of free trade agreements/arrangements
- impact of the COVID-19 on business operations and perceptions of the UK

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

1.3.2 Currency conversions

Respondents were asked about their company's annual turnover, and businesses with a turnover less than that equivalent to USD $2,000,000 were screened out. To enable ease of responding for participants, the currency bands were rounded in 2021. 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 (2021)

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 (2021)

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

Sum	Rounding
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 2021 data. Please note that these conversions were based on the conversion rates from the XE currency converter on 27/09/2021. The exchange rates were as follows:

Table 12: Currency conversion rates (as of 27 September 2021)

Currency	China (CNY)	Japan (JPY)	France/ Germany (EUR)	UAE (AED)	India (INR)	Brazil (BRL)
Units per USD	6.4575781647	110.9644729013	0.8545078935	3.6725000000	73.8466101438	5.3552328445

Currency	South Africa (ZAR)	Turkey (TRY)	Mexico (MXN)	South Korea (KRW)	Canada (CAD)	Australia (AUD)
Units per USD	14.9381974216	8.8225368224	20.1041752246	1,178.7976475970	1.2644717833	1.3729678027

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 traders were shown images from the GREAT Ready To Trade campaign, relevant to their classification, and in local languages where applicable.

In total, 2,327 respondents (66%) were able to view the material online. In contrast, 1,201 respondents (34%) 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 survey respondents who could access the online web page



Figure 1 shows 4 examples of GREAT campaign advertisements with taglines including 'Great Trade opens doors', 'Innovation is GREAT', 'Great Businesses are secure businesses', and 'Great Opportunities are opening up'. The full range of images shown to participants are available in the accompanying technical report.

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	UAE	TR	CA	MX	KR	AU
Completed Interviews	3,528	252	256	250	253	255	255	252	250	251	254	250	250	250	250
Sample Called	82,703	5,901	5,967	5,910	5,821	5,798	6,000	5,987	5,926	5,898	5,982	5,873	5,932	5,940	5,768
Soft Appointments	1148	70	78	78	89	77	86	82	80	107	78	110	67	75	71
Hard Appointments	602	30	36	38	65	34	45	49	23	58	56	68	18	29	53
Maximum call attempts	11,530	766	986	926	498	709	1,332	1054	678	600	702	688	1071	877	643
Screen outs (That is, ineligible)	10,691	678	739	722	717	832	687	766	822	834	776	700	802	798	818
Refusals	22,289	2,001	1,878	1,526	1028	756	2,338	2,017	1,687	698	1003	1,468	1,870	1,988	2,031
Unused	1,297	99	33	90	179	202	0	13	74	102	18	127	68	60	232
Eligibility rate	25%	27%	26%	26%	26%	23%	27%	25%	23%	23%	25%	26%	24%	24%	23%
Co-operation rate	39%	32%	35%	39%	49%	59%	29%	34%	39%	61%	51%	39%	36%	35%	34%

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

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, trade 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 2021 remained in line with eligibility in 2020. Tables 14 to 16 showing screened, screen-out counts, and eligibility comparisons between 2019, 2020, and 2021 are included below. For the purpose of comparison, the tables below include all markets, except Canada, Mexico, South Korea, and Australia (10 consistent markets).

Table 14: Screened

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

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 2 (2019)	Wave 3 (2020)	Wave 4 (2021)
Manufacturing	2,853	2,182	3,074
Construction	839	714	1,024
Wholesale, Retail and Motor Repair	3,438	1,908	2,957
Professional services	2,202	1,271	1,638
Other services	1,969	1,097	2,040

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

Table 16: Eligibility rate

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

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 trade or invest in the UK). 2018 sector profile information unavailable.

1.5. Weighted and unweighted sample profiles

Weights were applied to survey data to ensure that they matched the profile of the population of interest and the interviews completed in 2020.

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

Table 17: Weighted (w) and unweighted (u) sample profiles

			TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
FR	w	N	252	98	24	58	35	37
FR	w	%	100%	39%	10%	23%	14%	15%
FR	u	N	252	66	27	62	41	56
FR	u	%	100%	26%	11%	25%	16%	22%
DE	w	N	256	83	29	50	32	61
DE	w	%	100%	32%	11%	20%	13%	24%
DE	u	N	256	73	24	50	44	65
DE	u	%	100%	29%	9%	20%	17%	25%
US	w	N	250	69	20	81	38	41
US	w	%	100%	28%	8%	33%	15%	16%
US	u	N	250	55	21	69	48	57
US	u	%	100%	22%	8%	28%	19%	23%
ZA	w	N	253	148	12	49	24	20
ZA	w	%	100%	58%	5%	19%	9%	8%
ZA	u	N	253	61	19	57	71	45
ZA	u	%	100%	24%	8%	23%	28%	18%
IN	w	N	255	161	2	13	57	23
IN	w	%	100%	63%	1%	5%	22%	9%
IN	u	N	255	93	8	59	57	38
IN	u	%	100%	36%	3%	23%	22%	15%
JP	w	N	255	91	13	61	49	41

			TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
JP	w	%	100%	36%	5%	24%	19%	16%
JP	u	N	255	71	19	49	45	71
JP	u	%	100%	28%	7%	19%	18%	28%
CN	w	N	252	90	9	66	41	47
CN	w	%	100%	36%	3%	26%	16%	19%
CN	u	N	252	93	14	56	45	44
CN	u	%	100%	37%	6%	22%	18%	17%
BR	w	N	250	70	31	35	75	40
BR	w	%	100%	28%	12%	14%	30%	16%
BR	u	N	250	70	20	67	39	54
BR	u	%	100%	28%	8%	27%	16%	22%
AE	w	N	251	123	11	16	70	31
AE	w	%	100%	49%	4%	6%	28%	12%
AE	u	N	251	78	14	46	49	64
AE	u	%	100%	31%	6%	18%	20%	25%
TR	w	N	254	122	38	41	21	32
TR	w	%	100%	48%	15%	16%	8%	12%
TR	u	N	254	131	26	51	16	30
TR	u	%	100%	52%	10%	20%	6%	12%
CA	w	N	250	108	12	66	33	30
CA	w	%	100%	43%	5%	27%	13%	12%
CA	u	N	250	60	17	76	43	54
CA	u	%	100%	24%	7%	30%	17%	22%
MX	w	N	250	81	29	65	37	40
MX	w	%	100%	32%	11%	26%	15%	16%
MX	u	N	250	81	25	67	32	45
MX	u	%	100%	32%	10%	27%	13%	18%
KR	w	N	250	53	27	73	64	34
KR	w	%	100%	21%	11%	29%	25%	13%
KR	u	N	250	74	28	56	51	41
KR	u	%	100%	30%	11%	22%	20%	16%

			TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
AU	w	N	250	104	8	72	29	37
AU	w	%	100%	42%	3%	29%	12%	15%
AU	u	N	250	69	14	55	50	62
AU	u	%	100%	28%	6%	22%	20%	25%

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 confidence intervals at the 95% confidence level. This means that if the survey were to be conducted 100 times, a finding of the same nature would be found on at least 95 occasions. For example, if 10% or 90% of a sample of 3,018 gives a particular answer, the chances are 95 in 100 that the "true" value will fall within the range of +/- 1.1 percentage points from the sample results.

Table 18: Effective base sizes

Market	TOTAL (Unweighted)	Effective base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
TOTAL	3,528	3,018	±1.1	±1.4	±1.6	±1.7	±1.8
USA	250	238	±3.8	±5.1	±5.8	±6.2	±6.4
France	252	231	±3.9	±5.2	±5.9	±6.3	±6.4
Germany	256	250	±3.7	±5.0	±5.7	±6.1	±6.2
China	252	247	±3.7	±5.0	±5.7	±6.1	±6.2
Japan	255	234	±3.8	±5.1	±5.9	±6.3	±6.4
UAE	251	195	±4.2	±5.6	±6.4	±6.9	±7.0
India	255	185	±4.3	±5.8	±6.6	±7.1	±7.2
Brazil	250	202	±4.1	±5.5	±6.3	±6.8	±6.9
South Africa	253	150	±4.8	±6.4	±7.3	±7.8	±8.0
Turkey	254	245	±3.8	±5.0	±5.7	±6.1	±6.3
Canada	250	206	±4.1	±5.5	±6.3	±6.7	±6.8
Mexico	250	248	±3.7	±5.0	±5.7	±6.1	±6.2

[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.

Market	TOTAL (Unweighted)	Effective base	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
South Korea	250	235	±3.8	±5.1	±5.9	±6.3	±6.4
Australia	250	212	±4.0	±5.4	±6.2	±6.6	±6.7

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.

Yonder undertook a number of analyses to better understand patterns in the data. Yonder employed statistical regression analysis, using favourability as an outcome measure and the attitudes to the UK as independent drivers, to determine the overall role those attitudes play, as well as describing their relative strength in driving favourability. Yonder also employed CHAID analysis to determine the characteristics of businesses with high and low levels of likelihood to trade, or import.

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 trade/invest internationally or are considering doing so, and those with a minimum annual turnover of $2m and at least 10 employees.

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

Annual turnover (USD $)	N	%	Number of employees	N	%
$2,000,000 to $10,000,000	1,181	33%	10 to 49	1,253	36%
$10,000,000 to $50,000,000	1,116	32%	50 to 249	988	28%

Annual turnover (USD $)	N	%	Number of employees	N	%
$50,000,000 to $100,000,000	510	14%	250 to 499	451	13%
$100,000,000 to $500,000,000	439	12%	500 to 999	350	10%
$500,000,000 to $1,000,000,000	169	5%	1,000 to 1,999	195	6%
$1,000,000,000 and over	113	3%	2,000 to 4,999	154	4%
TOTAL	3,528	100%	5,000 and over	137	4%
			TOTAL	3,528	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, based on the proportions achieved in 2020, as detailed earlier. As interviews progressed and 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 and the final interviews achieved in the previous wave.

Table 20: Breakdown of respondents by sector (unweighted)

Sector	N	%
A - Agriculture, Forestry, Fishing	56	2%
B - Mining, Quarrying	31	1%
C - Manufacturing	1,075	30%
D - Electricity, Gas, Steam and Aircon	39	1%
E - Water, Sewerage, Waste	5	0%
F - Construction	276	8%
G - Wholesale, Retail, Motor Repair	820	23%
H - Transport/ Storage	166	5%

Sector	N	%
I - Accommodation/ Food Service	69	2%
J - Information and Communication	167	5%
K - Finance and Insurance	202	6%
L - Real Estate	32	1%
M - Professional, Scientific, Technical	218	6%
N - Admin and Support	12	0%
P – Education	35	1%
Q - Health and Social Work	71	2%
R - Arts/ Entertainment/ Recreation	21	1%
S - Other Services	233	7%
TOTAL	3,528	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: 14 market totals and 10 market totals. The trended 10 market totals represent the aggregated data of markets that were consistently present in the 2019, 2020, and 2021 surveys, respectively. All markets are included in the aggregated scores except Canada, Mexico, South Korea, and Australia. In contrast, the 14 market aggregated results include all markets surveyed in 2021 only. Almost equal numbers of interviews have been conducted in each market and each is given equal weight within the overall total (this means all markets have been treated equally in the weighting scheme regardless of their number of eligible businesses). The 'total' therefore reflects views across these 10 or 14 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.

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

1.8.4. Trade and Invest

In order to be eligible to participate in the survey, businesses needed to either already be trading or investing internationally or be considering doing so in the future. For the purposes of the survey, every respondent was assigned to either a 'trader' 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 trade or invest factors and not both (which would have made the questionnaire too long).

While every respondent in the survey was assigned to either a 'trader' or 'investor' group, it is important to bear in mind that there was significant overlap between the 2 groups. As Figure 2 shows, around 2 thirds of respondents were both. There were significantly more businesses that only traded/would consider trading (19%) compared to those that only invested/would consider investing (12%).

Within the overall sample for the 10 consistent markets in 2021, 1,271 respondents were classified as 'traders' and asked questions relating to trade, whilst 1,257 were classified as 'investors' and were asked questions relating to investment. For the overall 14 markets in 2021, the sample size for 'traders' increased to 1,769 respondents, and for 'investors', this increased to 1,759.

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

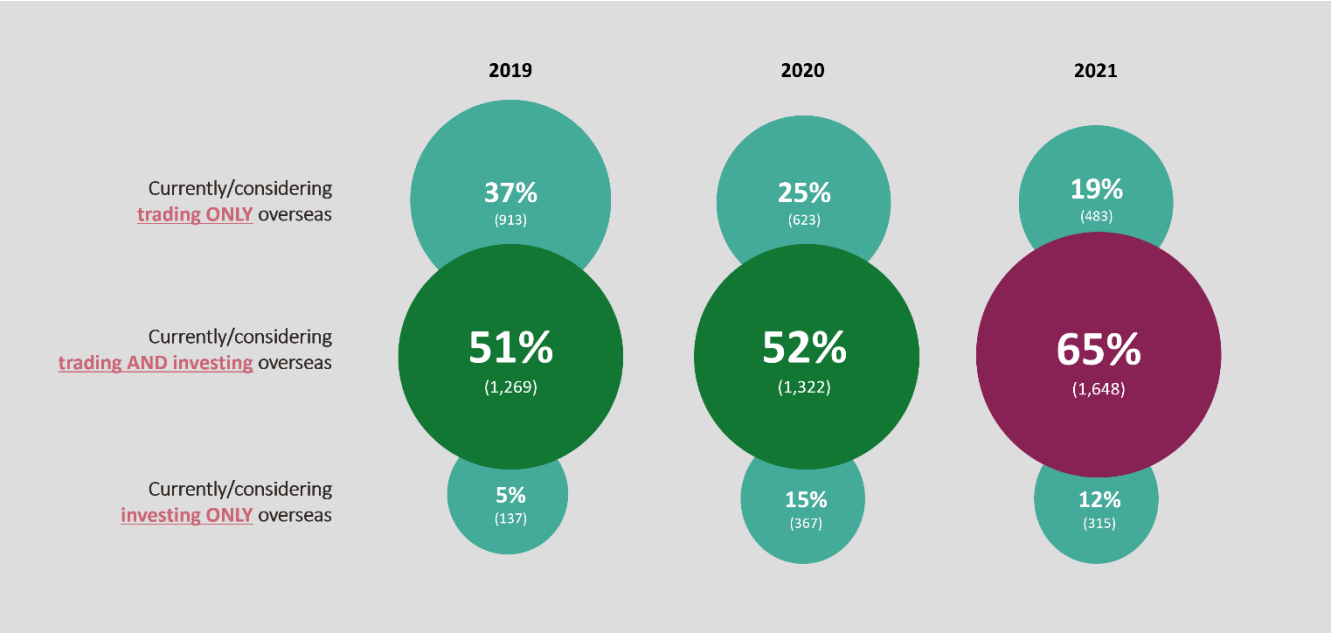


Figure 2 shows the proportion of businesses that are currently or considering trading ONLY overseas, businesses that are currently or considering investing ONLY overseas, and businesses that are currently or considering trading AND investing overseas. Figures from 2019 to 2021 are shown.

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 traders/investors accordingly) in local languages, as well as the over-arching campaign logo. Roughly 65% to 67% of all interviews accessed the internet to view campaign stimuli in 2021 and 2020, compared to the 44% who accessed the internet 2019 amongst the 10 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).

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.

[7] Can you recall having seen, read or heard any advertising, events or promotion which states 'We are the UK and we are ready to trade with you', or which includes phrases using the word GREAT to promote 'Great Britain' as a place to do business with? This might have included the phrases 'Innovation is GREAT', 'Creativity is GREAT' or 'Invest in GREAT'. These advertisements, events or promotional items include the words Britain and Northern Ireland and part of the red, white and blue union flag. They may also have included images relating to UK business.

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

Project managers monitored performance metrics on a daily basis with specific focus on sample performance and sufficiency, reviewed in conjunction with our fieldwork partner' Head of Call Centre Operations. A detailed progress report to an agreed DIT 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 2021 are first 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 DIT. 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 DIT prior to CATI scripting. The questionnaire was scripted using Confirmit software and tested by the CATI programmer and by the fieldwork partner 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.

The steps undertaken during fieldwork included:

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

- approximately 10% of interviews were monitored via respondent-permissioned recordings (with some live shadowing of calls)
- interviewer performance was assessed regularly, with individual interviewers being monitored in proportion to their contribution to the fieldwork; all findings discussed directly with interviewers with improvement potential clearly signposted where necessary
- additional monitoring of approach calls was conducted to ensure engaging and effective recruitment techniques were being deployed (a key element in maximisation of sample yield).
- verbatim responses collected (specified ‘others’) were continually checked and cleansed throughout the fieldwork period by the relevant project managers
- subsequent to initial field checks, specified ‘other’ responses were reviewed by a dedicated coding specialist: open responses that could have been coded using the question’s pre-existing response frame were back-coded where appropriate

After fieldwork was concluded, the following 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 provided to Yonder at 2 agreed milestones during fieldwork, to enable data checking and the feedback of amendments / additions / deletions / re-ordering etc. to be made before end of fieldwork, enabling final data to be sent as soon as possible after fieldwork completion
- verbatims (specified ‘others’) were supplied as a separate Excel document since lengthy verbatim comments can become truncated in SPSS exports
- final quality checks and base checks were undertaken on completion of fieldwork, and the final data file (plus verbatim file) was produced and delivered within 24 hours of fieldwork end

3. Appendix

3.1. Questionnaire

2021 DIT International Traders and Investors Study

CATI VERSION

GATEKEEPER INTRODUCTION

I1. Good morning/afternoon. I am calling from a research company called (insert contractor here) an independent market research agency based in the UK that is conducting a research study on behalf of the UK Government (DIT – Department for International Trade) The aim of the study is to research views of companies in your country about the United Kingdom.

INTERVIEW NOTE: STRESS AS NECESSARY

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

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?

INTERVIEW NOTE, ADD IF NEEDED: We want to interview the business even if they don't currently invest abroad or buy products/services from companies abroad.

[SINGLE CODE]

TABLE I2: ANSWER CODES

ANSWER	CODE	ACTION
Named person speaking	1	GO TO I3
Transferred	2	GO TO I3
Not currently available (INTERVIEW NOTE: COLLECT NAME)	3	MAKE APPOINTMENT
Nobody with responsibility at this site (INT: ASK FOR TRANSFER)	4	NEW CALL
Refused	5	THANK AND CLOSE
No one is responsible for these activities	6	THANK AND CLOSE

ASK ALL

I3. My name is <NAME> and I am calling from a research company called (insert) an independent research company based in the UK. We have been asked to conduct a survey on behalf of the UK Government (DIT – Department for International Trade) about businesses' perceptions of international trade and foreign investment. It will take about 25 minutes.

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?

[SINGLE CODE]

TABLE I4: ANSWER CODES

ANSWER	CODE	ACTION
Yes / Maybe	1	GO TO S0
No (INT:COLLECT NAME and NUMBER AND ASK FOR TRANSFER)	2	NEW CALL
Refused	3	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.

NEW SCREEN:

RecordingConsent *[OUR FIELDWORK PARTNER IN-HOUSE QUESTIONS, GDPR-COMPLIANT]*

NEW SCREEN:

Intro0 *[OUR FIELDWORK PARTNER RESPONDENT AVAILABILITY QUESTION. TO GUARD AGAINST RESPONDENT DRIVING WHILST PARTICIPATING]*

TIMESTAMP 1

SECTION A: SCREENERS AND CLASSIFICATIONS

ASK ALL

S0. Is your organisation . . . ?

Read out.

[SINGLE CODE]

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

[IF CODE 2 CLOSE INTERVIEW. ELSE CONTINUE]

ASK ALL

CV1. To start off with, we'd like to ask about the impact of the coronavirus (COVID-19) pandemic, on your business. This will help to provide some context to the rest of your answers

Compared to before the coronavirus (COVID-19) pandemic, what is the current status of your business? Would you say that…

IF NECESSARY: We are interested in the entirety of the business operations, not just overseas operations.

READ OUT. SINGLE CODE

1. There has been no change; business/work has remained the same as before the COVID-19 pandemic
2. Business/work has reduced
3. Business/work has increased
4. We have paused work or temporarily closed
5. We paused work or temporarily closed, but have since re-started or re-opened
6. The business has permanently closed/ No longer have any business/work/permanently ceased (business has not been able to survive) – CLOSE INTERVIEW
7. [DO NOT READ OUT] Don't know *[ANCHOR, EXCLUSIVE]*
8. [DO NOT READ OUT] Prefer not to say *[ANCHOR, EXCLUSIVE]*

ASK ALL

S1a. Does your organisation currently buy or import products or services from companies based abroad?

1. Yes, currently buys/imports
2. No

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. (INTERVIEW NOTE: DO NOT READ) Don't know

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

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 5 years?

[SINGLE CODE]

1. Yes
2. No
3. (INTERVIEW NOTE: 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:
TRADE: S1a = (1) OR S1b = (1) OR S1c = 1 OR S1d = 1
NO TRADE: S1a = (2) AND S1b = (2 OR 3) AND S1c = 2 AND S1d = (2 OR 3) TRADE: S1 = (3 OR 4) AND S1a = (3 OR 4)
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.

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

[SINGLE CODE]

1. Yes, currently invests abroad
2. No

ASK ALL WHO SAY NO AT S2a

S2b. Are you considering investing in other countries in the future?

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

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?

[SINGLE CODE]

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

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

S2d. Have you invested in the UK within the last 5 years? (CLARIFY IF NECESSARY: Since [current month] 2016).

1. Yes
2. No
3. (INTERVIEW NOTE: 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 TRADE" AND "NO INVEST", GO TO S5 AND THEN CLOSE INTERVIEW.
ELSE CONTINUE

ASK ALL EXCEPT "NO TRADE 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)

INTERVIEW NOTE: PROBE FOR BEST ESTIMATE.

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

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

S3Coded: **Is it around** [INSERT NUMBER FROM SAMPLE] **employees?**

TABLE S3Coded: ANSWER CODES

ANSWER	CODE
EXACT NUMBER	_____
Don't know	X
If providing estimate	SINGLE CODE
[DO NOT READ OUT] 1-9	1
10 to 49	2
50 to 249	3
250 to 499	4
500 to 999	5
1,000 to 1,999	6
2,000 to 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.

ASK ALL EXCEPT "NO TRADE" 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]?

TABLE S4a: ANSWER CODES: 10 markets

Code at S4	USA (USD)	China (Chinese Yuan)	Japan (Japanese Yen)	French/ Germany (Euro)	UAE (Emirati Dirham)	India (Indian Rupee, in Crore)	Brazil (BRL)	South Africa (ZAR)	Turkey (TRY)
1	Under $2,000,000 USD	Under ¥13,000,000 CNY	Under ¥220,000,000 JPY	Under €1,700,000 EUR	Under 7,300,000 AED	Under 14.7 crores INR	Under R$10,600,000 BRL	Under 30,000,000 ZAR	Under ₺18,000,000 TRY
2	$2,000,000 to $10,000,000 USD	¥13,000,000 to ¥60,000,000 CNY	¥220,000,000 to ¥1,000,000,000 JPY	€1,700,000 to €8,000,000 EUR	7,300,000 to 40,000,000 AED	14.7 crores to 70 crores INR	R$10,600,000 to R$50,000,000 BRL	30,000,000 to 100,000,000 ZAR	₺18,000,000 to ₺90,000,000 TRY
3	$10,000,000 to $50,000,000 USD	¥60,000,000 to ¥300,000,000 CNY	¥1,000,000,000 to ¥5,000,000,000 JPY	€8,000,000 to €40,000,000 EUR	40,000,000 to 200,000,000 AED	70 crores to 400 crores INR	R$50,000,000 to R$300,000,000 BRL	100,000,000 to 700,000,000 ZAR	₺90,000,000 to ₺400,000,000 TRY
4	$50,000,000 to	¥300,000,000 to	¥5,000,000,000 to	€40,000,000 to	200,000,000 to	400 crores to 700 crores	R$300,000,000 to	700,000,000 to	₺400,000,000 to

Code at S4	USA (USD)	China (Chinese Yuan)	Japan (Japanese Yen)	French/ Germany (Euro)	UAE (Emirati Dirham)	India (Indian Rupee, in Crore)	Brazil (BRL)	South Africa (ZAR)	Turkey (TRY)
	$100,000,000 USD	¥600,000,000 CNY	¥10,000,000,000 JPY	€80,000,000 EUR	400,000,000 AED	INR	R$500,000,000 BRL	1,000,000,000 ZAR	₺900,000,000 TRY
5	$100,000,000 to $500,000,000 USD	¥600,000,000 to ¥3,000,000,000 CNY	¥10,000,000,000 to ¥50,000,000,000 JPY	€80,000,000 to €400,000,000 EUR	400,000,000 to 2,000,000,000 AED	700 crores to 4,000 crores INR	R$500,000,000 to R$3,000,000,000 BRL	1,000,000,000 to 7,000,000,000 ZAR	₺900,000,000 to ₺4,000,000,000 TRY
6	$500,000,000 to $1,000,000,000 USD	¥3,000,000,000 to ¥6,000,000,000 CNY	¥50,000,000,000 to ¥100,000,000,000 JPY	€400,000,000 to €800,000,000 EUR	2,000,000,000 to 4,000,000,000 AED	4,000 crores to 7,000 crores INR	R$3,000,000,000 to R$5,000,000,000 BRL	7,000,000,000 to 10,000,000,000 ZAR	₺4,000,000,000 to ₺9,000,000,000 TRY
7	Over $1,000,000,000 USD	Over ¥6,000,000,000 CNY	Over ¥100,000,000,000 JPY	Over €800,000,000 EUR	Over 4,000,000,000 AED	Over 7,000 crores INR	Over R$5,000,000,000 BRL	Over 10,000,000,000 ZAR	Over ₺9,000,000,000 TRY
8	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused

TABLE S4b: ANSWER CODES: new markets
Additional markets

Code at S4	Mexico (MXN)	South Korea (South Korean Won)	Canada (CAD)	Australia (AUD)
1	Under $40,000,000 MXN	Under ₩2,400,000 KRW	Under $2,500,000 CAD	Under $2,800,000 AUD
2	$40,000,000 to $200,000,000 MXN	₩2,400,000 to ₩10,000,000,000 KRW	$2,500,000 to $10,000,000 CAD	$2,700,000 to $15,000,000 AUD
3	$200,000,000 to $1,000,000,000 MXN	₩10,000,000,000 to ₩60,000,000,000 KRW	$10,000,000 to $60,000,000 CAD	$10,700,000 to $70,000,000 AUD
4	$1,000,000,000 to $2,000,000,000 MXN	₩60,000,000,000 to ₩100,000,000,000 KRW	$60,000,000 to $100,000,000 CAD	$70,000,000 to $100,000,000 AUD
5	$2,000,000,000 to $10,000,000,000 MXN	₩100,000,000,000 to ₩600,000,000,000 KRW	$100,000,000 to $600,000,000 CAD	$100,000,000 to $700,000,000 AUD
6	$10,000,000,000 to $20,000,000,000 MXN	₩600,000,000,000 to ₩1,000,000,000,000 KRW	$600,000,000 to $1,000,000,000 CAD	$700,000,000 to $1,000,000,000 AUD
7	Over $20,000,000,000 MXN	Over ₩1,000,000,000,000 KRW	Over $1,000,000,000 CAD	Over $1,000,000,000 AUD
8	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused	(INTERVIEW NOTE: DO NOT READ OUT) Don't know / refused

[PROG: USE THE S5 RESPONSE LIST AS PART OF DISPOSITION CODES (TO FEED INTO THE FIELDWORK UPDATES)]

ASK ALL INELIGIBLE DUE TO "NO TRADE" 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?

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.

INTERVIEW NOTE: DO NOT READ OUT.

[MULTI CODE OK, APART FROM DON'T KNOW]

TABLE S5: ANSWER CODES

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

CODE	REASON
	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)
	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
18	Other
19	Don't know
	[FURTHER ADDITIONS TO THIS LIST (IF ANY) - NUMBER FROM CODE 20 ONWARDS]

THANK AND CLOSE ALL ANSWERING S5
ELSE CONTINUE

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.

[SINGLE CODE]

TABLE S7: ANSWER CODES

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

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.

[**SINGLE CODE]**

TABLE S8: ANSWER CODES

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

ASK ALL

S9a. We have [SAMPLE SECTOR] as your main industry sector. Can I just check that this is correct?

[SINGLE CODE]

DO NOT PROMPT

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

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?)

[SINGLE CODE]

PROMPT TO CODE

TABLE S9b: ANSWER CODES

SECTOR	CODE
A - Agriculture, Forestry and Fishing	1
B - Mining and Quarrying	2
C - Manufacturing	3
D- Electricity, Gas, Steam and Aircon	4
E- Water, Sewerage and Waste	5
F -Construction	6
G - Wholesale, Retail and Motor Repair	7
H - Transport and Storage	8
I - Accommodation and Food Service	9
J - Information and Communication	10
K - Finance and Insurance	11

SECTOR	CODE
L - Real Estate	12
M - Profession, Scientific and Technical	13
N - Admin and Support	14
P - Education	15
Q - Health and Social Work	16
R - Arts, Entertainment and Recreation	17
S - Other Services	18

[PROG: ADD VAR FOR GFEST DIT SECTORS]

PROG: DUMMY VARIABLE FOR ROUTING AND TEXT
TRADE: 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 TRADE AND INVEST, USE 'LEAST FULL' ALGORITHM AND ALLOCATE TO TRADE OR INVEST
SET UP DUMMY FOR EACH COUNTRY
PUT IN MAX QUOTA OF 150 FOR EACH TRADE AND INVEST PER COUNTRY

END OF SCREENER

MAIN QUESTIONNAIRE

CAMPAIGN AWARENESS – UNPROMPTED RECALL

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

INTERVIEW NOTE: DO NOT READ OUT.

[MULTICODE OK]

[PROG: DO NOT SHOW COUNTRY OF RESPONDENT]

TABLE UR1: ANSWER CODES

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

COUNTRY	CODE
Morocco	23
Netherlands	24
Poland	25
Portugal	26
Taiwan	27
Thailand	28

TIMESTAMP 2

SECTION B: TRADE AND INVESTMENT IN UK AND COMPETITORS

ASK IF TRADE

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….

[SINGLE CODE]

INTERVIEW NOTE: READ OUT SCALE FOR EACH COUNTRY LISTED.

[REVERSE SCALE]
[RANDOMISE COUNTRY LIST]
[PLEASE INCLUDE A "DON'T KNOW" OPTION FOR EACH COUNTRY]

TABLE B1: ANSWER CODES

CODE	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	1	2	3	4

CODE	COUNTRY	A great deal	A fair amount	Not very much	Nothing at all
	RESPONDENTS)				
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

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….

[SINGLE CODE]

INTERVIEW NOTE: READ OUT SCALE FOR EACH COUNTRY LISTED.

[REVERSE SCALE]
[RANDOMISE COUNTRY LIST]
[PLEASE INCLUDE A "DON'T KNOW" OPTION FOR EACH COUNTRY]

TABLE B1a: ANSWER CODES

CODE	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

CODE	COUNTRY	A great deal	A fair amount	Not very much	Nothing at all
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

ASK B3 IF TRADE

B3. How likely is your organisation to buy or import products and services from companies based in the following countries in the next 3 years? (CLARIFY IF NECESSARY: Until [current month] 2024).

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

[RANDOMISE COUNTRY LIST]

TABLE B3: ANSWER CODES

CODE	COUNTRY	**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

CODE	COUNTRY	**Not at all likely**								**Certain to**	
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 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?

[MULTICODE EXCEPT DON'T KNOW/not applicable]

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

TABLE B4a: ANSWER CODES

CODE	OBSTACLE
	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
	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)

CODE	OBSTACLE
16	Don't know
19	Environmental reasons
20	Covid-19 / coronavirus
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 24 ONWARDS….

ASK IF CODE 6 TO 10 FOR UK (AT B3_A) = LIKELY TO BUY/IMPORT FROM UK

B4b (ASK IF 6 to 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?

[MULTICODE EXCEPT DON'T KNOW]

INTERVIEW NOTE: DO NOT READ OUT

TABLE B4b: ANSWER CODES

CODE	ATTRACTION
	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

CODE	ATTRACTION
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
21	Other(SPECIFY)
22	Don't know
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 30 ONWARDS…..

ASK IF TRADE:

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?

TABLE B3b: ANSWER CODES

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

ASK ALL TRADE

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?

[MULTICODE EXCEPT DON'T KNOW/NONE]

INTERVIEW NOTE: DO NOT READ OUT

TABLE B5d: ANSWER CODES:

CODE	ORGANISATION
	IN DOMESTIC COUNTRY (WHERE RESPONDENT BASED):
2	Domestic country's chamber of commerce/trade association/industry body
3	Domestic country's government trade department/agency/embassy
8	Consultancies/Other private companies in domestic market
	IN TARGET COUNTRY:
4	Embassy/government of target country
13	Consultancies/Private companies in the target market
14	Target country's chamber of commerce/trade association/industry body
15	Target country's government trade department/agency/embassy
17	Target country's economic attaché
18	UK Embassy/government/DIT/UK Export Finance
19	UK trade association/industry body
	INTERNATIONAL ORGANISATIONS/SOURCES:
6	International trade association/industry body
	IN RESPONDENT'S OWN COMPANY:
9	Overseas office of the company
1	UK office of the company
5	Internal specialists within own company
	GENERAL SOURCES (LOCATION NOT SPECIFIED):
10	Banks
11	Export Credit Agencies

CODE	ORGANISATION
12	Personal networks/ existing contractual relationships/ Businesses community forum
7	Internet search for relevant 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 23 ONWARDS…..

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 3 years? (**CLARIFY IF NECESSARY**: Until [current month] 2023). Please give a score between 1 and 10 where 1 would mean you are not at all likely and 10 that you are certain to.

[RANDOMISE COUNTRY LIST]

B6: ANSWER CODES

CODE	COUNTRY	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

CODE	COUNTRY	Not at all likely								Certain to	
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

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

B6a. (ASK IF 1 to 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?

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

[MULTICODE except DK]

TABLE B6a: ANSWER CODES

CODE	OBSTACLE
	UK-SPECIFIC OBSTACLES:
4	Bureaucratic problems/ Political reasons / 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

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

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?

[MULTI CODE (EXCEPT DK)]

INTERVIEW NOTE: DO NOT READ OUT

TABLE B6b: ANSWER CODES

CODE	ATTRACTION
	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

CODE	ATTRACTION
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
20	Other (SPECIFY)
21	Don't know/ Not applicable
	FURTHER ADDITIONS TO THIS LIST – NUMBER FROM CODE 29 ONWARDS…..

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?

TABLE B6a1: ANSWER CODES

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

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?

[MULTICODE EXCEPT DON'T KNOW]

INTERVIEW NOTE: DO NOT READ OUT

B7d: ANSWER CODES

CODE	ORGANISATION
	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:

CODE	ORGANISATION
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
	OTHER:
18	Depends on country
21	Others (SPECIFY)
22	Don't know
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 23 ONWARDS…..

TIMESTAMP 3

SECTION C: ASSOCIATION WITH KEY ATTRIBUTES

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…

TABLE C1: ANSWER CODES

ANSWER	CODE
Very favorable	1
Somewhat favorable	2
Neither favorable nor unfavorable	3
Somewhat unfavorable	4
Very unfavorable	5
Don't know INTERVIEW NOTE: DO NOT READ OUT	6

ASK IF TRADE

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.

[RANDOMISE STATEMENTS]
INTERVIEW NOTE: READ OUT EACH STATEMENT. PLEASE ENTER CODE 99 IF "DON'T KNOW"

IF TRADE

TABLE C2_a: ANSWER CODES

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

IF TRADE 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 to 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

[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]

TABLE C2A2a/C2A2b: ANSWER CODES

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

ASK IF TRADE 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 to 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

[PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_a, 1 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]

TABLE C2A2c/C2A2d: ANSWER CODES

CODE	TRADE	Score (1 to 10) UK	Score (1 to 10) USA
A	Reputation for providing innovative products or services		
B	High quality products and services		
C	Competitive pricing		
D	Working within a high quality, reliable infrastructure		
E	Reputation for providing creative products or services		
F	Open and welcoming to international business		
G	Easy to ship goods		
H	Shares the same working values and practices as businesses in my country		
I	Environmentally friendly products and services		

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.

[RANDOMISE STATEMENTS]

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

TABLE C2_b: ANSWER CODES

CODE	INVEST	Score (1 to 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	

CODE	INVEST	Score (1 to 10)
F	Gateway to other markets	
H	Potential to make high returns	
I	Environmentally friendly	

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 to 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

[PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_b, 1 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]

TABLE C2B2a/C2B2b: ANSWER CODES

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

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 to 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

[PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_b, 1 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]

TABLE C2B2c/C2B2d: ANSWER CODES

CODE	INVEST	Score (1 to 10) UK	Score (1 to 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		

TIMESTAMP 4

SECTION D: CAMPAIGN AWARENESS – PROMPTED RECALL

ASK ALL

D1. I am now going to ask you about promotional activity you might have seen, read or heard. Please have a think about anything you may have seen, read or heard recently which was promoting foreign business opportunities in another country (such as foreign investments or opportunities to buy products and services from organisations in that country).

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

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

[SINGLE CODE FOR EACH]

[RANDOMISE]

TABLE D1: ANSWER CODES

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

ASK D2 IF UK/GB MENTIONED AT UR1 (CODE 5) 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?

INTERVIEW NOTE: DO NOT READ/PROMPT.

[MULTICODE (EXCEPT CAN'T REMEMBER)]

TABLE D2: ANSWER CODES

CODE	SOURCE
	PRINT PRESS:
1	Advertisements in magazines, newspapers or trade press
2	Articles /photos in magazines, newspapers or trade press
	MEDIA:

CODE	SOURCE
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 AND GENERAL):
12	On a mobile application/App
5	Online advertisement / banner
6	Articles / photos online
	SPECIFIC VENUES/EVENTS:
13	At trade shows / events / conferences / exhibitions/ talks
14	At the airport
27	Webinar / virtual event
17	From/at the British Embassy/British Consulate
	SPECIFIC SOURCES:
18	From the national Government
19	Via an organisation representing businesses (e.g. DIT, Chamber of Commerce)
20	Via UK Export Finance or a Trade finance organization
23	

CODE	SOURCE
24	
25	
	OTHERS:
16	From friends, family or colleagues
21	Other (SPECIFY)
22	Can't remember
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 28 ONWARDS…..

ASK D3 IF UK/GREAT BRITAIN MENTIONED AT UR1 (CODE 5) 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?

INTERVIEW NOTE: DO NOT READ/PROMPT.

[MULTICODE OK]

1. UK/Britain is a good place in which to invest (non-specific)
2. UK/Britain is a good place to trade with (non-specific)
3. UK/Britain is ready to trade
4. UK/Britain is **GREAT** to do business with (INTERVIEW NOTE: NOTE SPECIFIC CAPITALISATION OF 'GREAT')
5. UK/Britain is a good place for business collaboration
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

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

ASK IF CODE 1 AT D4

D4A. Please go to http://dit.populus.co.uk AND CLICK ON THE CAMPAIGN 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]

ASSET 1: Renewables Wind Farm



Image shows numerous wind turbines at sea organised to look like the Union Jack flag. The main text reads "Where are the energy solutions of tomorrow a reality today?"

ASSET 2: Life Sciences



Image shows numerous red, white, and blue coloured test tubes in a laboratory organised to look like the Union Jack flag. The main text reads "Where have life scientists found the formula for success?"

ASSET 3: Smart Cities Tunnel

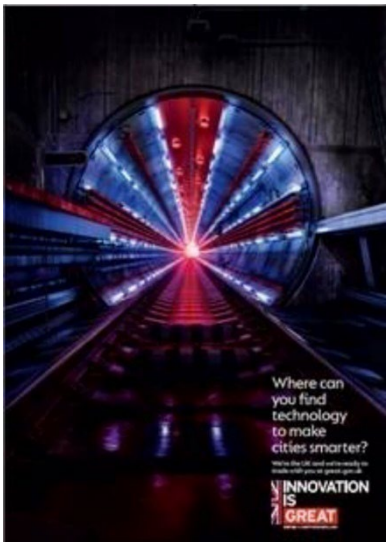


Image shows an underground train tunnel with red, white, and blue lights in the tunnel organised to look like the Union Jack flag. The main text reads "Where can you find technology to make cities smarter?"

ASSET 4: GREAT Opportunities



Image shows a cityscape view of London and the famous "Shard" building. There are several beams of light, organised to represent the Union Jack flag, shining out from the top of The Shard. The main text reads "Great opportunities are opening up".

ASSET 5: GREAT Businesses



Image shows a man in a suit and tie pressing his thumb on the glass of a fingerprint scanner where the viewer is able

to see the fingerprint from the other side of the glass. The fingerprint is covered by small but bright lights that are organised to represent the Union Jack flag, indicating that a scan is taking place, The main text reads "Great businesses are secure business".

ASSET 6: GREAT Trade



Image shows 2 people inside of a warehouse opening to large warehouse doors open. The patterns on each door resemble the line and colours used on the Union Jack Flag. The main text reads "Great trade opens doors?"

1. Yes, seen 1 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

ASK IF CODE 1 OR 2 AT D4A

D4AI. Please can you give me a brief description of what you see on the screen?

INTERVIEW NOTE: 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

ASK IF CODE 1 AT D4

D4AII. Please now click on the word 'Logo' on screen.
Looking at these images, do you remember seeing any of these 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.

INVEST IN GREAT BRITAIN & NORTHERN IRELAND

INNOVATION IS GREAT BRITAIN & NORTHERN IRELAND



INTERVIEW NOTE: **IF NECESSARY EXPLAIN**: 'PROMOTIONAL MATERIALS' CAN INCLUDE THINGS LIKE LETTERHEAD, EVENT LOGOS

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)

[ASK IF CODE 2 AT D4 OR CODE 2 AT D4AI]

D4B. Can you recall having seen, read or heard any advertising, events or promotion which states 'We are the UK and we are ready to trade with you', or which includes phrases using the word GREAT to promote 'Great Britain' as a place to do business with?
This might have included the phrases 'Innovation is GREAT', 'Creativity is GREAT' or 'Invest in GREAT'.
INTERVIEWER: BE EXPLICIT ABOUT 'GREAT'. SPELL OUT IF NECESSARY ("G-R-E-A-T").
These advertisements, events or promotional items include the words Britain and Northern Ireland and part of the red, white and blue union flag. They may also have included images relating to UK business.

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

DP: create dummy variables for GREAT recognisers

GREAT recognisers: CODE 1 or 2 AT D4A AND CODE 1 at D4AI, OR CODE 1 or 2 AT D4AII, OR CODE 1 AT D4B

GREAT non-recognisers:

CODE 1 or 2 AT D4A AND CODE 2 AT D4AI AND CODE 3 or 4 AT D4AII AND CODE 2 or 3 AT D4B,

OR CODE 3 or 4 at D4A AND 3 or 4 at D4AII AND CODE 2 or 3 AT D4B

ASK ALL GREAT RECOGNISERS

D4C. Where do you remember seeing or hearing about GREAT?

[MULTICODE (EXCEPT CAN'T REMEMBER)]

INTERVIEW NOTE: DO NOT READ/PROMPT

TABLE D4C: ANSWER CODES

CODE	SOURCE
	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

CODE	SOURCE
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 20 ONWARDS…..

ASK ALL GREAT RECOGNISERS

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?

[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

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:

INTERVIEW NOTE: GIVE A SCORE 1 to 10 FOR EACH STATEMENT

[RANDOMISE ORDER OF STATEMENTS]

ALLOW DON'T KNOW

TABLE D6: ANSWER CODES

CODE	ANSWER	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 TRADE AND FROM JAPAN, CHINA): has had a direct impact on the amount of money your company has spent on procuring	1	2	3	4	5	6	7	8	9	10	11

CODE	ANSWER	Strongly disagree								Strongly agree	
	products and services from the UK (IF INVEST AND FROM JAPAN, CHINA): has had a direct impact on the amount of money your company has spent on investing in the UK.										

ASK IF REMEMBER SEEING ANY ADVERTISING/PROMOTION OF UK (VIA GREAT OR OTHER): GREAT RECOGNISER OR CODE 1 AT D1 (FOR UK) OR CODE 5 AT UR1

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

[SINGLE CODE]

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

ASK IF D6B=1

D6C. What did you do? PROBE: What actions did you take (even if only minor ones)?

[MULTICODE (EXCEPT CAN'T REMEMBER)]

INTERVIEW NOTE: DO NOT READ/PROMPT

TABLE D6C: ANSWER CODE

CODE	ACTION
	ONLINE:
1	Visited the GREAT website
18	Downloaded an e-book from the GREAT website
2	Submitted an online query form

CODE	ACTION
	VERBAL CONTACT/DIRECT COMMUNICATION:
3	Spoke with a trade/investment advisor
6	Spoke with potential UK suppliers about business opportunities
10	Spoke with existing business contacts in the UK about potential opportunities
11	Spoke with other sector specialists
	SPECIFIC IN-COMPANY ACTIONS:
4	Considered UK companies in a procurement exercise
5	Shortlisted the UK as a potential market to invest in
12	Researched potential UK suppliers/invest opportunities (not GREAT website specific)
13	Researched rules/regulations of doing business with the UK (e.g. regulations, tax, logistics, representatives)
14	Researched other aspects of the UK markets (e.g. demand, competitors, customers, distribution channels, promotion or visited the country)
	OTHER SPECIFIC ACTIONS:
7	Bought from a British supplier
8	Attended a DIT event
9	Attended a general event because UK were present
	OTHER:
15	No action taken
16	Don't Know
17	Other (SPECIFY)
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 19 ONWARDS…..

ASK ALL WHO ARE GREAT RECOGNISERS AND WHO EITHER ALREADY INVEST/ TRADE IN UK OR ARE CONSIDERING DOING SO (S1c = 1 OR B3 (A) = 6-10 AND/OR S2c = 1 OR B6 (A) = 6-10)

D6D. You mentioned earlier that: [Specific wording below]

<If S1c=1 AND S2c=1> -- you already trade with and invest in the UK
<If S1c=2 AND B3_1=6,7,8,9,10 AND S2c=2 AND B6_1=6,7,8,9,10 -- you are considering trading and investing in the UK in the next 3 years

<If S1c=1 AND S2c=2 AND B6_1=6,7,8,9,10> -- you already trade with and considering investing in the UK in the next 3 years
<If S1c=2 AND B3_1=6,7,8,9,10 AND S2c=1> -- you already invest in and considering trading with the UK in the next 3 years
<If S1c=1 AND S2c=2 AND B6_1=1,2,3,4,5> -- you already trade with the UK
<If S1c=2 AND B3_1=1,2,3,4,5 AND S2c=1> -- you already invest in the UK
<If S1c=2 AND B3_1=6,7,8,9,10 AND S2c=2 AND B6_1=1,2,3,4,5> -- you are considering trading with the UK in the next 3 years
<If S1c=2 AND B3_1=1,2,3,4,5 AND S2c=2 AND B6_1=6,7,8,9,10> -- you are considering investing in the UK in the next 3 years

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

READ OUT.

[SINGLE CODE. REVERSE ORDER PER INTERVIEW (CODES 1 to 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

TIMESTAMP 5

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

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?

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

[MULTICODE (EXCEPT DK/NONE)]

INTERVIEW NOTE: 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
13. Suppliers' websites
14. Business contacts outside your organization
15. Recommendations from friends/colleagues
16. Domestic government
17. Other countries' embassies
18. Bank/venture capitalist
19. Webinars / virtual events
20. Other (SPECIFY)
21. DK
22. None/Don't use
23. Domestic trade shows/ events
24. International trade shows/ events

ASK E3b2 TO ALL (INVEST <u>AND</u> TRADE): TRADE 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?

[MULTICODE (EXCEPT DK/NONE)]

INTERVIEW NOTE: 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
13. Suppliers' websites
14. Business contacts outside your organization
15. Recommendations from friends/colleagues
16. Domestic government
17. Other countries' embassies
18. Bank/venture capitalist
19. Webinars / virtual events
20. Other (SPECIFY)
21. DK
22. None/Don't use
23. Domestic trade shows/ events
24. International trade shows/ events

ASK ALL WHO SELECT 2 OR MORE OF CODES 1 to 20 (INCLUSIVE) AT E3b2

E3. And which of the sources you just mentioned do you use most often to stay informed about your industry?

[SHOW ONLY OPTIONS SELECTED AT E3b2. SINGLE CODE]

INTERVIEW NOTE: 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
13. Suppliers' websites
14. Business contacts outside your organization
15. Recommendations from friends/colleagues
16. Domestic government
17. Other countries' embassies
18. Bank/venture capitalist
19. Webinars / virtual events
20. Other (SPECIFY)
21. DK
22. None/Don't use
23. Domestic trade shows/ events
24. International trade shows/ events

ASK ALL

(Ask all TRADE)

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]

TABLE G3A1: ANSWER CODES

CODE	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						
Covid-19 has made procuring						

CODE	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(DO NOT READ OUT) Don't know/can't remember
internationally more difficult						

(Ask all INVEST)

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.
To what extent do you agree or disagree that…

[RANDOMISE OPTIONS]

TABLE G3A1b: ANSWER CODES

CODE	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						
Covid-19 has made investing internationally more difficult						

SECTION F: FREE TRADE AGREEMENTS

ASK ALL

F1. How knowledgeable are you about the trade arrangements in place between your country and the UK (such as whether there may be a free trade agreement, bilateral investment treaty), or mutual recognition agreement (MRA) in place.

1. Very knowledgeable
2. Fairly knowledgeable
3. Not very knowledgeable
4. Not at all knowledgeable
5. Don't know (DO NOT READ OUT)

ASK ALL FRANCE, GERMANY

F2A. The Trade and Cooperation Agreement between the UK and the EU is now in place. Would you say that this has made you more or less likely to do any of the following, or has it made no difference?

[DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE.]

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

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

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

F2A1. IF MORE LIKELY: You said you would be more likely to **[pipe answer from F2A]**. Can I ask why you say that? [IF MORE LIKELY TO TRADE AND INVEST, ASK FOR BOTH SEPARATELY]

[MULTICODE (EXCEPT DK/NONE)]

INTERVIEW NOTE: DO NOT READ/PROMPT

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

F2A2. IF LESS LIKELY: You said you would be less likely to **[pipe answer from F2A].** Can I ask why you say that? [IF LESS LIKELY TO TRADE AND INVEST, ASK FOR BOTH SEPARATELY]

[MULTICODE (EXCEPT DK/NONE)]
INTERVIEW NOTE: DO NOT READ/PROMPT

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

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

F2B. 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?

[DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE]

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

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

TABLE F2B: ANSWER CODES

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

F2B1. IF MORE LIKELY: You said you would be more likely to [**pipe answer from F2B**]. Can I ask why you say that? [IF MORE LIKELY TO TRADE AND INVEST, ASK FOR BOTH SEPARATELY]

[MULTICODE (EXCEPT DK/NONE)]

INTERVIEW NOTE: DO NOT READ/PROMPT

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

F2B2. IF LESS LIKELY: You said you would be less likely to [**pipe answer from F2B**]. Can I ask why you say that? [IF LESS LIKELY TO TRADE AND INVEST, ASK FOR BOTH SEPARATELY]

[MULTICODE (EXCEPT DK/NONE)]
INTERVIEW NOTE: DO NOT READ/PROMPT

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

ASK ALL USA, BRAZIL, INDIA, CHINA, UAE, AUSTRALIA, TURKEY

F2C. Would a Free Trade Agreement between your country and the UK make your more or less likely to do any of the following, or make no difference?

[DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE]

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

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

TABLE F2C: ANSWER CODES

ANSWER	CODE
Much more likely	**1**
A little more likely	**2**
No difference	**3**

ANSWER	CODE
A little less likely	**4**
Much less likely	**5**
Don't know INT: DO NOT READ OUT	**6**

F2C1. IF MORE LIKELY: You said you would be more likely to **[pipe answer from F2C].** Can I ask why you say that? [IF MORE LIKELY TO TRADE AND INVEST, ASK FOR BOTH SEPARATELY]

[MULTICODE (EXCEPT DK/NONE)]
INTERVIEW NOTE: DO NOT READ/PROMPT

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

F2C2. IF LESS LIKELY: You said you would be less likely to **[pipe answer from F2C]**. Can I ask why you say that? [IF LESS LIKELY TO TRADE AND INVEST, ASK FOR BOTH SEPARATELY]

[MULTICODE (EXCEPT DK/NONE)]
INTERVIEW NOTE: DO NOT READ/PROMPT

1. More complex paperwork
2. Increased duties/taxes
3. Increased cost of compliance with rules (e.g. rules of origin, or other admin burdens)
4. UK is now a less attractive market as a result of the Free Trade Agreement
5. Business confidence/certainty has reduced
6. Worse/fewer opportunities created by the UK Free Trade Agreement compared to the EU Free Trade Agreement
7. Reduced supply/demand from consumers/other firms/suppliers as a result of the UK Free Trade Agreement compared to the EU Free Trade Agreement

8. Other
9. Don't know

SECTION G: Impact of coronavirus

ASK ALL

CV3. How, have your perceptions of each of the following countries changed since the start of the COVID-19 pandemic? For each I read, please give a score between 0 and 10 where 0 would mean your general perceptions of the country are much more negative, 5 means your general perceptions have stayed the same, and 10 means your general perceptions of the country are much more positive.

IF NECESSARY SAY: Even if you are not currently trading with or investing in this/these countries we are still interested in your perceptions]

[PROGRAMMER: GRID, 0-10, INC DK BUT DO NOT OFFER]

a. US
b. France
c. China
d. Germany
e. Japan
f. Great Britain or the United Kingdom, including England, Wales, Scotland and Northern Ireland

ASK ALL

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

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

[SINGLE CODE]

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

THANK AND CLOSE

gov.uk

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