

Department for
Business, Innovation,
Science and Trade

International Traders and Investors Study 2020

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 Yonder in 2020.

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, serves 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 2019/20 (DIT), and the Industrial Strategy (Department for Business Energy and Industrial Strategy, also known as BEIS).

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
- quantifying 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 2,772 interviews with businesses that have the potential to trade with and/or invest in the UK. Fieldwork took place in 11 markets: France, Germany, United States of America (USA), Japan, China, India, United Arab Emirates (UAE), South Africa, Brazil, Turkey and Canada. The survey was conducted using CATI (Computer Assisted Telephone Interviewing) by Yonder's fieldwork partner, between 17 September and 11 December 2020.

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

(That is, 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 million. 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 3 years (2018 to 2020). This was a quota survey. Quotas were set on turnover (under and over $50 million) and sector to reflect the overall population of businesses in each market and quotas based on the 2019 final set of interviews achieved. This was consistent with the approach adopted in the 2018 and 2019 surveys. During fieldwork, the rates of sample incidence[1] informed adaptive quotas so more accurate targets could be set by size and sector.

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

Initial incidence rates in this study were informed by incidences obtained from the previous wave in 2019. 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, the approach was carried out on around 40%-50% of all interviews.

1.2.4. Sample selection

In total, 66,000 businesses were selected from the Dun and Bradstreet database in 2020. 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 & Bradstreet records by market

COUNTRY	TOTAL
France	6,000
Germany	6,000
United States of America (USA)	6,000
South Africa	6,000
India	6,000
Japan	6,000
China	6,000
Brazil	6,000

COUNTRY	TOTAL
United Arab Emirates (UAE)	6,000
Turkey	6,000
Canada	6,000
TOTAL	**66,000**

In each market, the sample was stratified by turnover and industry 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 million annual turnover. The population in which sample was drawn from based on these criteria is presented in Tables 2-4 below.

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

INDUSTRY SECTOR (1987 SIC)	France (N)	France (%)	Germany (N)	Germany (%)	USA (N)	USA (%)	S. Africa (N)	S. Africa (%)
A - Agriculture, Forestry & Fishing	87	1%	70	1%	59	1%	500	8%
B - Mining & Quarrying	16	0%	9	0%	34	1%	189	3%
C - Manufacturing	1,043	17%	1,198	20%	923	15%	600	10%
D - Electricity, Gas, Steam & Aircon	19	0%	32	1%	36	1%	27	0%
E - Water, Sewerage & Waste	7	0%	45	1%	37	1%	7	0%
F - Construction	774	13%	481	8%	585	10%	715	12%
G - Wholesale, Retail & Motor Repair	1,362	23%	930	16%	1,540	26%	959	16%
H - Transport & Storage	424	7%	295	5%	223	4%	154	3%
I - Accommodation & Food Service	353	6%	125	2%	142	2%	321	5%
J - Information & Communication	300	5%	271	5%	289	5%	107	2%
K - Finance & Insurance	242	4%	367	6%	402	7%	1,276	21%
L - Real Estate	104	2%	113	2%	178	3%	57	1%
M - Professional, Scientific & Technical	497	8%	554	9%	529	9%	236	4%
N - Admin & Support	89	1%	121	2%	67	1%	4	0%
P - Education	60	1%	104	2%	221	4%	38	1%
Q - Health & Social Work	275	5%	789	13%	405	7%	144	2%
R - Arts, Entertainment & Recreation	63	1%	85	1%	71	1%	77	1%
S – Other Services	285	5%	411	7%	259	4%	589	10%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%

INDUSTRY SECTOR (1987 SIC)	India (N)	India (%)	Japan (N)	Japan (%)	China (N)	China (%)	Brazil (N)	Brazil (%)
A - Agriculture, Forestry & Fishing	21	0%	43	1%	26	0%	94	2%
B - Mining & Quarrying	34	1%	7	0%	74	1%	83	1%
C - Manufacturing	1,231	21%	1,172	20%	2,917	49%	1,455	24%
D - Electricity, Gas, Steam & Aircon	29	0%	6	0%	74	1%	47	1%
E - Water, Sewerage & Waste	10	0%	61	1%	30	1%	32	1%

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

INDUSTRY SECTOR (1987 SIC)	India (N)	India (%)	Japan (N)	Japan (%)	China (N)	China (%)	Brazil (N)	Brazil (%)
F - Construction	411	7%	907	15%	270	5%	324	5%
G - Wholesale, Retail & Motor Repair	2,580	43%	1,149	19%	861	14%	1,967	33%
H - Transport & Storage	174	3%	318	5%	152	3%	400	7%
I - Accommodation & Food Service	24	0%	123	2%	48	1%	105	2%
J - Information & Communication	316	5%	357	6%	181	3%	108	2%
K - Finance & Insurance	278	5%	187	3%	203	3%	241	4%
L - Real Estate	98	2%	245	4%	279	5%	79	1%
M - Professional, Scientific & Technical	261	4%	299	5%	165	3%	271	5%
N - Admin & Support	16	0%	105	2%	8	0%	76	1%
P - Education	132	2%	70	1%	328	5%	89	1%
Q - Health & Social Work	112	2%	566	9%	241	4%	234	4%
R - Arts, Entertainment & Recreation	36	1%	87	1%	16	0%	78	1%
S- Other Services	237	4%	298	5%	127	2%	317	5%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%

INDUSTRY SECTOR (1987 SIC)	UAE (N)	UAE (%)	Turkey (N)	Turkey (%)	Canada (N)	Canada (%)	Sector total (N)	Sector total (%)
A - Agriculture, Forestry & Fishing	12	0%	54	1%	116	2%	1,082	2%
B - Mining & Quarrying	151	3%	69	1%	98	2%	764	1%
C - Manufacturing	813	14%	2,432	41%	1,100	18%	14,884	23%
D - Electricity, Gas, Steam & Aircon	14	0%	45	1%	15	0%	344	1%
E - Water, Sewerage & Waste	15	0%	8	0%	27	0%	279	0%
F - Construction	447	7%	377	6%	578	10%	5,869	9%
G - Wholesale, Retail & Motor Repair	2,361	39%	1,851	31%	1,704	28%	17,264	26%
H - Transport & Storage	325	5%	316	5%	211	4%	2,992	5%
I - Accommodation & Food Service	121	2%	150	3%	147	2%	1,659	3%
J - Information & Communication	182	3%	98	2%	204	3%	2,413	4%
K - Finance & Insurance	359	6%	147	2%	329	5%	4,031	6%
L - Real Estate	94	2%	23	0%	153	3%	1,423	2%
M - Professional, Scientific & Technical	526	9%	204	3%	465	8%	4,007	6%
N - Admin & Support	48	1%	12	0%	20	0%	566	1%
P - Education	57	1%	18	0%	71	1%	1,188	2%
Q - Health & Social Work	68	1%	67	1%	271	5%	3,172	5%
R - Arts, Entertainment & Recreation	45	1%	12	0%	109	2%	679	1%
S- Other Services	362	6%	117	2%	382	6%	3,384	5%
TOTAL	6,000	100%	6,000	100%	6,000	100%	66,000	100%

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

NUMBER OF EMPLOYEES	France (N)	France (%)	Germany (N)	Germany (%)	USA (N)	USA (%)	S. Africa (N)	S. Africa (%)
10 to 49	4,282	71%	3,677	61%	3,418	57%	4,519	75%
50 to 249	1,385	23%	1,793	30%	1,973	33%	1,221	20%
250 to 499	166	3%	286	5%	265	4%	140	2%

NUMBER OF EMPLOYEES	France (N)	France (%)	Germany (N)	Germany (%)	USA (N)	USA (%)	S. Africa (N)	S. Africa (%)
500 to 999	88	1%	120	2%	160	3%	64	1%
1,000 to 1,999	36	1%	62	1%	77	1%	29	0%
2,000 to 4,999	36	1%	43	1%	62	1%	14	0%
5,000+	7	0%	19	0%	45	1%	13	0%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%

NUMBER OF EMPLOYEES	India (N)	India (%)	Japan (N)	Japan (%)	China (N)	China (%)	Brazil (N)	Brazil (%)
10 to 49	4,307	72%	4,080	68%	2,488	41%	2,812	47%
50 to 249	1,211	20%	1,580	26%	2,425	40%	2,460	41%
250 to 499	195	3%	189	3%	467	8%	357	6%
500 to 999	140	2%	75	1%	300	5%	194	3%
1,000 to 1,999	72	1%	36	1%	197	3%	94	2%
2,000 to 4,999	37	1%	28	0%	78	1%	54	1%
5,000+	38	1%	12	0%	45	1%	29	0%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%

NUMBER OF EMPLOYEES	UAE (N)	UAE (%)	Turkey (N)	Turkey (%)	Canada (N)	Canada (%)	Employee size total (N)	Employee size total (%)
10 to 49	2,655	44%	3,043	51%	4,284	71%	39,565	60%
50 to 249	2,144	36%	2,157	36%	1,268	21%	19,617	30%
250 to 499	339	6%	426	7%	222	4%	3,052	5%
500 to 999	286	5%	216	4%	114	2%	1,757	3%
1,000 to 1,999	178	3%	81	1%	59	1%	921	1%
2,000 to 4,999	125	2%	48	1%	32	1%	557	1%
5,000+	273	5%	29	0%	21	0%	531	1%
TOTAL	6,000	100%	6,000	100%	6,000	100%	66,000	100%

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

ANNUAL TURNOVER	France (N)	France (%)	Germany (N)	Germany (%)	USA (N)	USA (%)	S. Africa (N)	S. Africa (%)
$2,000,000 to $10,000,000	4,094	68%	4,473	75%	4,073	68%	5,165	86%
$10,000,000 to $50,000,000	1,452	24%	1,060	18%	1,419	24%	651	11%
$50,000,000 to $100,000,000	217	4%	211	4%	203	3%	63	1%
$100,000,000 to $500,000,000	200	3%	203	3%	217	4%	71	1%
$500,000,000 to $1,000,000,000	21	0%	31	1%	36	1%	17	0%
$1,000,000,000 and over	16	0%	22	0%	52	1%	33	1%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%

ANNUAL TURNOVER	India (N)	India (%)	Japan (N)	Japan (%)	China (N)	China (%)	Brazil (N)	Brazil (%)
$2,000,000 to $10,000,000	5,075	85%	3,895	65%	4,715	79%	4,842	81%
$10,000,000 to $50,000,000	687	11%	1,609	27%	964	16%	903	15%
$50,000,000 to $100,000,000	103	2%	222	4%	149	2%	123	2%
$100,000,000 to $500,000,000	113	2%	202	3%	125	2%	109	2%
$500,000,000 to $1,000,000,000	8	0%	41	1%	24	0%	11	0%
$1,000,000,000 and over	14	0%	31	1%	23	0%	12	0%
TOTAL	6,000	100%	6,000	100%	6,000	100%	6,000	100%

ANNUAL TURNOVER	UAE (N)	UAE (%)	Turkey (N)	Turkey (%)	Canada (N)	Canada (%)	Turnover total (N)	Turnover total (%)
$2,000,000 to $10,000,000	3,448	57%	3,657	61%	4,335	72%	47,772	72%
$10,000,000 to $50,000,000	1,503	25%	1,811	30%	1,295	22%	13,354	20%
$50,000,000 to $100,000,000	359	6%	251	4%	175	3%	2,076	3%
$100,000,000 to $500,000,000	402	7%	242	4%	142	2%	2,026	3%
$500,000,000 to $1,000,000,000	111	2%	15	0%	29	0%	344	1%
$1,000,000,000 and over	177	3%	24	0%	24	0%	428	1%
TOTAL	6,000	100%	6,000	100%	6,000	100%	66,000	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, business size, and annual turnover, followed by definitions of each of the conversion stages. Further information on final sample outcomes can be seen in Table 11.

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

	TOTAL	Construction	Manufacturing	Other	Professional Services	Wholesale
Sample purchased	66,000	5,869	14,884	15,543	12,440	17,264
Unused sample	983	35	174	355	95	324
Sent to number lookup	65,017	5,834	14,710	15,188	12,345	16,940
Successful lookup	65,017	5,834	14,710	15,188	12,345	16,940
Loaded to CATI	65,017	5,834	14,710	15,188	12,345	16,940
Total number of started surveys	22,907	1,929	7,956	3,765	3,763	5,494
Screened interviews	3,193	203	1,084	512	550	844
Partially completed interviews	421	26	134	79	72	110
Total completed interviews	2,772	177	950	433	478	734

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

	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	5,000+ employees
Sample purchased	66,000	39,565	19,617	3,052	1,757	921	557	531
Unused sample	983	710	234	37	0	1	1	0
Sent to number lookup	65,017	38,855	19,383	3,015	1,757	920	556	531
Successful lookup	65,017	38,855	19,383	3,015	1,757	920	556	531
Loaded to CATI	65,017	38,855	19,383	3,015	1,757	920	556	531
Total number of started surveys	22,907	11,515	6,955	1,862	1,173	630	446	326
Screened interviews	3,193	1,159	967	393	260	165	128	121
Partially completed interviews	421	178	99	54	37	25	13	15
Total completed interviews	2,772	981	868	339	223	140	115	106

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

	TOTAL	$2,000,000 to $10,000,000	$10,000,000 to $50,000,000	$50,000,000 to $100,000,000	$100,000,000 to $500,000,000	$500,000,000 to $1,000,000,000	$1,000,000,000	TOTAL
Sample purchased	66,000	47,772	13,354	2,076	2,026	344	428	66,000
Unused sample	983	688	274	7	12	1	1	983
Sent to number lookup	65,017	47,084	13,080	2,069	2,014	343	427	65,017
Successful lookup	65,017	47,084	13,080	2,069	2,014	343	427	65,017

	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	TOTAL
Loaded to CATI	65,017	47,084	13,080	2,069	2,014	343	427	65,017
Total number of started surveys	22,907	14,521	5,595	1,321	1,039	206	225	22,907
Screened interviews	3,193	1,129	974	478	357	117	138	3,193
Partially completed interviews	421	180	86	61	48	17	29	421
Total completed interviews	2,772	949	888	417	309	100	109	2,772

Key:

- **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, between 2018, 2019, and 2020. Overall, there was no consistent pattern in the differences between population counts between 2018 to 2019 and 2019 to 2020. For example, in Japan, there was a 39% reduction in Construction firms moving into 2019 but a 67% increase in the same sector moving from 2019 to 2020. This pattern was not consistent within other sectors in the Japanese market or among other markets. Some shifts were much smaller while others were considerably larger across waves. counts information was drawn

from the same source (Dun and Bradstreet) with the same definitions (Businesses 10+ employees and annual turnover of $2M 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, it's 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	France 2018 to 2019	France 2019 to 2020	China 2018 to 2019	China 2019 to 2020	Japan 2018 to 2019	Japan 2019 to 2020	Germany 2018 to 2019	Germany 2019 to 2020	India 2018 to 2019	India 2019 to 2020
Manufacturing	-34%	46%	318%	45%	-47%	67%	12%	-12%	857%	4%
Construction	-27%	43%	770%	3%	-39%	67%	38%	-11%	9,770%	-5%
Wholesale, Retail and Motor Repair	-34%	44%	193%	49%	-24%	63%	33%	-26%	6,204%	30%
Professional services	10%	-26%	187%	42%	31%	-60%	25%	-35%	44,74%	-36%
Other services	-14%	180%	293%	171%	-22%	401%	154%	16%	38,58%	39%
TOTAL	-21%	42%	296%	50%	-19%	62%	38%	-15%	32,34%	4%

Sector	UAE 2018 to 2019	UAE 2019 to 2020	USA 2018 to 2019	USA 2019 to 2020	Brazil 2018 to 2019	Brazil 2019 to 2020	South Africa 2018 to 2019	South Africa 2019 to 2020	Turkey 2018 to 2019	Turkey 2019 to 2020
Manufacturing	689%	6%	193%	-68%	-	44%	-	32%	-	-2%
Construction	888%	38%	228%	-70%	-	103%	-	8%	-	-7%
Wholesale, Retail and Motor Repair	531%	-5%	296%	-75%	-	50%	-	16%	-	-20%
Professional services	674%	-52%	122%	-75%	-	24%	-	-22%	-	-29%
Other services	1,334%	89%	357%	-49%	-	209%	-	68%	-	24%
TOTAL	683%	7%	215%	-69%	-	60%	-	8%	-	-8%

Brazil, South Africa, and Turkey were included in 2019 and 2020 tracking only. Canada was included in tracking for the first time in 2020.

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 Yonder's 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
INDIA	100%	-	-	-	-	-	-	-	-
USA	100%	-	-	-	-	-	-	-	-
UAE	89%	11%	-	-	-	-	-	-	-
S. AFRICA	100%	-	-	-	-	-	-	-	-
CANADA	95%	-	-	-	-	-	-	-	5%
FRANCE	3%	-	97%	-	-	-	-	-	-
GERMANY	6%	-	-	94%	-	-	-	-	-
CHINA	-	-	-	-	100%	-	-	-	-
JAPAN	-	-	-	-	-	100%	-	-	-
BRAZIL	-	-	-	-	-	-	100%	-	-
TURKEY	-	-	-	-	-	-	-	100%	-

The average interview length was 27 mins. The minimum length was 20 mins and maximum length was 37 minutes. Table 10 below outlines the questionnaire length by market.

Table 10: Questionnaire length

	OVERALL	FRANCE	GERMANY	USA	S. AFRICA	INDIA
Average length (minutes)	27	26	26.5	25	29	28

	JAPAN	CHINA	BRAZIL	UAE	TURKEY	CANADA
Average length (minutes)	28	26	28	29	25	27

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 less than 10 employees
- businesses with an annual turnover of less than $2million (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
- impact of the EU Exit on perceptions of the UK
- 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. Campaign materials

All respondents were asked to go online[3] 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, 1,898 respondents (68%) were able to view the material online. In contrast, 874 respondents (32%) were read descriptions[4] of the images, due to either the inability or refusal to access the internet during the time of interviewing. Examples of GREAT campaign material evaluated in this study are shown below in Figure 1.

[3] 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.

[4] 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





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 Yonder's fieldwork partner was used in all countries. The survey scripting was also carried out by Yonder's 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 below.

Table 11: Sample outcomes

	TOTAL	FR	DE	USA	ZA	IN	JP	CN	BR	UAE	TR	CA
Completed Interviews	2,772	252	253	251	252	252	252	255	250	251	253	251
Sample Called	65,107	5,964	5,957	5,937	5,741	5,844	5,986	5,961	5,931	5,948	5,984	5,854
Soft Appointments	465	39	63	35	59	31	72	58	16	6	34	52
Hard Appointments	472	22	38	33	57	42	51	61	31	11	55	71
Maximum call attempts	8,787	870	870	845	587	670	1,198	930	790	692	535	800
Screen outs (that is, ineligible)	9,051	811	876	745	794	983	908	740	803	1,017	728	646
Refusals	15,995	1,872	1,623	1,787	990	772	2,261	1,987	1,462	787	902	1,552
Unused	7,129	230	768	349	793	1,408	222	476	394	959	1,007	523
Eligibility rate	24%	24%	22%	25%	24%	20%	22%	26%	24%	20%	26%	28%
Co-operation rate	44%	36%	41%	36%	51%	62%	34%	33%	42%	62%	52%	37%

Key:

- **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

In 2020, there was a slight increase in the proportion of business who were eligible to take part in the study, compared to 2019. Tables 12 to 14 showing screened, screen-out counts, and eligibility comparisons between 2019 and 2020 are included below. The tables below include all markets, except Canada (10 consistent markets).

Table 12: Screened

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

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

Table 13: Screen-outs

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

N.B. Screen-outs are all of the screened businesses who 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 14: Eligibility rate

	Wave 2 (2019) N	Wave 2 (2019) %	Wave 3 (2020) N	Wave 3 (2020) %
Total Sample Loaded	151,662	100%	66,000	100%
Manufacturing	992	0.7%	952	1.4%
Construction	98	0.1%	179	0.3%
Wholesale, Retail and Motor Repair	870	0.6%	733	1.1%
Professional services	314	0.2%	477	0.7%
Other services	228	0.2%	431	0.7%

N.B. Eligibility rate calculated as the proportion of respondents from the total sample loaded who qualify for the survey based on all 3 criteria (must have 10 or more employees, make at least $2M 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 2019.

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

Table 15: Weighted (w) and unweighted (u) sample profiles

	TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
France (w) N	252	140	11	39	43	19
France (w) %	100%	56%	4%	15%	17%	8%
France (u) N	252	91	18	54	47	42
France (u) %	100%	36%	7%	21%	19%	17%
Germany (w) N	254	111	9	77	37	20
Germany (w) %	100%	44%	4%	30%	15%	8%
Germany (u) N	253	90	12	68	43	40
Germany (u) %	100%	36%	5%	27%	17%	16%
USA (w) N	252	135	12	60	26	19
USA (w) %	100%	54%	5%	24%	10%	8%
USA (u) N	251	87	19	64	40	41
USA (u) %	100%	35%	8%	25%	16%	16%
South Africa (w) N	252	124	9	86	16	17
South Africa (w) %	100%	49%	4%	34%	6%	7%
South Africa (u) N	252	65	18	83	43	43
South Africa (u) %	100%	26%	7%	33%	17%	17%
India (w) N	251	171	13	12	36	19
India (w) %	100%	68%	5%	5%	14%	8%
India (u) N	252	104	20	44	50	34
India (u) %	100%	41%	8%	17%	20%	13%
Japan (w) N	252	127	12	57	44	12
Japan (w) %	100%	50%	5%	23%	17%	5%
Japan (u) N	252	95	19	61	38	39
Japan (u) %	100%	38%	8%	24%	15%	15%
China (w) N	255	100	10	58	48	39
China (w) %	100%	39%	4%	23%	19%	15%
China (u) N	255	115	12	50	40	38
China (u) %	100%	45%	5%	20%	16%	15%
Brazil (w) N	250	83	24	46	74	23
Brazil (w) %	100%	33%	10%	18%	30%	9%
Brazil (u) N	250	79	16	83	37	35
Brazil (u) %	100%	32%	6%	33%	15%	14%
UAE (w) N	252	75	8	69	89	11
UAE (w) %	100%	30%	3%	27%	35%	4%
UAE (u) N	251	64	13	92	47	35
UAE (u) %	100%	25%	5%	37%	19%	14%

	TOTAL	Manufacturing	Construction	Wholesale, retail, motor repair	Professional services	Other
UAE (w) N	254	56	18	66	85	29
UAE (w) %	100%	22%	7%	26%	33%	11%
Turkey (u) N	253	86	17	81	34	35
Turkey (u) %	100%	34%	7%	32%	13%	14%
Canada (w) N	251	133	10	38	46	24
Canada (w) %	100%	53%	4%	15%	18%	10%
Canada (u) N	251	76	15	53	58	49
Canada (u) %	100%	30%	6%	21%	23%	20%

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 16 along with associated confidence intervals at 95% confidence level (that is, the range of values that one can be 95% certain contains the true average had the whole population been surveyed).

Table 16: Effective base sizes

	TOTAL (Unweighted)	Effective base	95% confidence interval
TOTAL	2,772	2,279	±1.9
FRANCE	252	213	±6.2
GERMANY	253	237	±6.2
USA	251	212	±6.2
S. AFRICA	252	185	±6.2
INDIA	252	191	±6.2
JAPAN	252	223	±6.2
CHINA	255	250	±6.1
BRAZIL	250	200	±6.2
UAE	251	201	±6.2
TURKEY	253	186	±6.2
CANADA	251	200	±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.

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 17 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 17: Breakdown of respondents by size and turnover

ANNUAL TURNOVER (USD $)	N	%	NUMBER OF EMPLOYEES	N	%
$2,000,000 to $10,000,000	807	29%	10 to 49	981	35%
$10,000,000 to $50,000,000	841	30%	50 to 249	868	31%
$50,000,000 to $100,000,000	403	15%	250 to 499	339	12%
$100,000,000 to $500,000,000	368	13%	500 to 999	223	8%
$500,000,000 to $1,000,000,000	126	5%	1,000 to 1,999	140	5%
$1,000,000,000 and over	227	8%	2,000 to 4,999	115	4%
TOTAL	2,772	100%	5,000+	106	4%
			TOTAL	2,772	100%

1.8.2. Sector

Table 18 shows the sector breakdown of businesses within the study. A sample of businesses in each market was obtained from D&B as detailed earlier, based on the proportions achieved in 2019. 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 2019.

Table 18: Breakdown of respondents by sector

SECTOR	N	%
A - Agriculture, Forestry, Fishing	23	1%
B - Mining, Quarrying	21	1%
C - Manufacturing	952	34%
D - Electricity, Gas, Steam & Aircon	8	0%
E - Water, Sewerage, Waste	12	0%
F - Construction	179	6%
G - Wholesale, Retail, Motor Repair	733	26%
H - Transport/ Storage	90	3%
I - Accommodation/ Food Service	59	2%
J - Information & Communication	75	3%
K - Finance and Insurance	164	6%
L - Real Estate	49	2%
M - Professional, Scientific, Technical	168	6%
N - Admin & Support	21	1%
P – Education	31	1%
Q - Health and Social Work	50	2%
R - Arts/ Entertainment/ Recreation	20	1%
S - Other Services	117	4%
TOTAL	2,772	100%

1.8.3. Market

When interpreting overall findings, it is important to consider that the total findings presented are aggregated results from across markets that are consistent in both the 2020 and 2019 surveys, respectively. That is to say, all markets are included in the aggregated scores except Canada. This is also the case for the 11 market aggregated results for 2020 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 11 markets.

In most research studies, there will be an element of cultural bias[6] which affects how people in different countries respond to survey questionnaires. However, in this study, we believe that variations within samples in each market and broader socio-political factors will have a greater effect on how respondents answer questions about doing business with other countries and the subsequent variations by market.

1.8.4. 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).

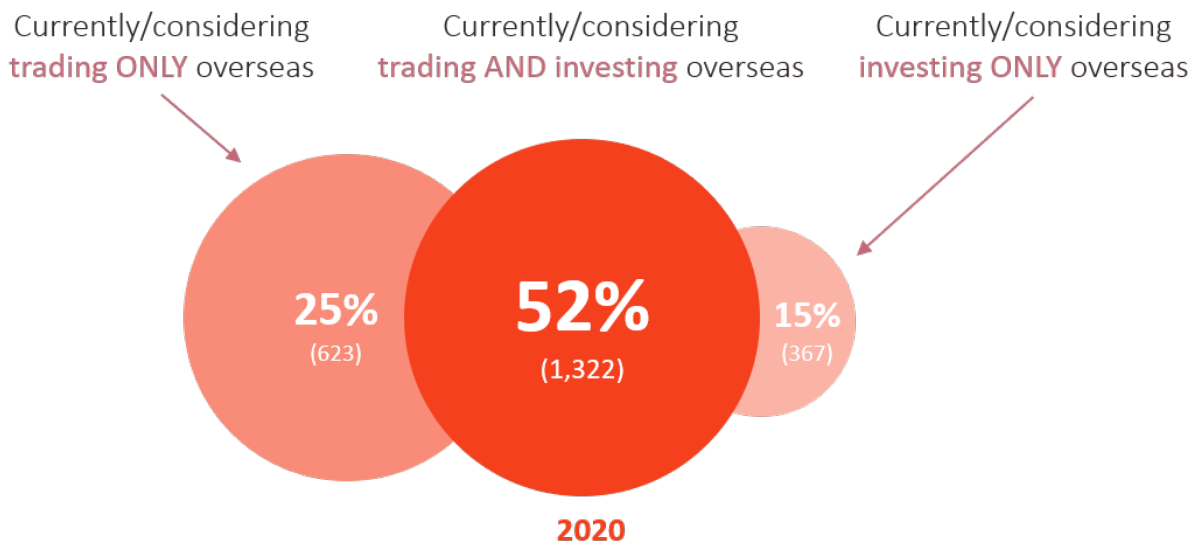
While every respondent in the survey was assigned to either a 'trader' or 'investor' group, it is important to bear in mind that there was significant overlap between the 2 groups. As Figure 2 shows, around half of respondents were both. There were significantly more businesses that only traded/would consider trading (25%) compared to those that only invested/would consider investing (15%).

This means that when interpreting the views of 'traders' and 'investors', it should be kept in mind that 'traders' were mainly engaged in trading only, whilst 'investors' were more likely to be doing/thinking of doing both.

Within the overall sample for the 10 consistent markets in 2020, 1,280 respondents were classified as 'traders' and asked questions relating to trade, whilst 1,241 were classified as 'investors' and were asked questions relating to investment. For the overall 11 markets in 2020, the sample size for the 'traders' increased to 1,404 respondents and for 'investors', this increased to 1,368.

[6] Chris Menzies: International research Golden rules, making sense of international data: https://mk0yonderconsul4hgxk.kinstacdn.com/wp-content/uploads/2021/03/international-2021.pdf

Figure 2: Breakdown of respondents by international trading and investment activities – 6-market total



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. Around 67% of all interviews accessed the internet to view campaign stimuli in 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

[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.

1.10. Reporting methodology

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

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

2. Background quality report

2.1. Data quality of data sources

Telephone fieldwork for this study was conducted and managed by Yonder's fieldwork partner. All fieldwork was conducted centrally by the fieldwork partner from their call-centre in 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. The fieldwork partner's dedicated Quality Control Manager also conducted random checks to guard against any quality control 'blind-spots' that can occur when a large field team is deployed.

Project managers monitored performance metrics on a daily basis with specific focus on sample performance and sufficiency, reviewed in conjunction with the fieldwork partner's 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. The quality control steps undertaken in 2020 before the fieldwork period included:

Before the fieldwork, whilst conscious of the need to track data consistent with previous wave's dataset, the questionnaire underwent a collaborative and iterative assessment process between the 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's quality assurance department. Once the 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 the fieldwork partner via email. Amendments were implemented and the same link was then used by Yonder to retest until final sign-off. 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

2.3. 2020 data review – important caveats for 2020

The 2020 ITIS survey was designed to ensure consistency with previous waves of the survey. However, the 2020 survey shows some very large shifts in attitudes and behaviour reported by businesses. Following the outbreak of the coronavirus pandemic, 2020 was a somewhat atypical year for businesses around the world. As a result, we would urge caution in use of the year-on-year comparisons presented throughout this report. The survey will be repeated in 2021 and that data will help to provide a clearer picture as to whether the shifts seen in 2020 represent a longer-term trend or whether the 2020 results represent an anomaly in the attitudes and behaviour of firms.

3. Appendix

3.1. Questionnaire

2020 DIT International Traders and Investors Study

CATI VERSION

GATEKEEPER INTRODUCTION

I1. Good morning/afternoon. I am calling from a research company called [fieldwork partner name], an independent market research agency 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.

INT: 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?

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

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

PRO: ASK ALL ELIGIBLE
I3. My name is <NAME> **and I am calling from a research company called [fieldwork partner name], working in partnership with Populus, 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.**

Intro0. Also please note that this call may be recorded for quality and training purposes. For more details on our data privacy policy you can visit our website. Also, please be assured that all your information will be kept anonymous and will be used for research purposes only.

NEW SCREEN:

I4. Can I first check - are you the most senior person responsible for making decisions on whether to

grow your business in other countries or to buy products and services from companies abroad?
PROG: SINGLE CODE ONLY

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

NEW SCREEN:

Privacy. I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. The UK's Department for International Trade 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 Populus's website at [fieldwork partner name], and I can arrange a time to call you back.**

NEW SCREEN:

RecordingConsent ***[[fieldwork partner name] IN-HOUSE QUESTIONS, GDPR-COMPLIANT]***

NEW SCREEN:

Intro0 ***[[fieldwork partner name] RESPONDENT AVAILABILITY QUESTION: ONLY ASKED AT INTERVIEWER DISCRETION – FOR EXAMPLE, TO GUARD AGAINST RESPONDENT DRIVING WHILST PARTICIPATING]***

PROG: TIMESTAMP 1

SECTION A: SCREENERS AND CLASSIFICATIONS

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

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

IF CODE 2 CLOSE INTERVIEW. ELSE CONTINUE

PROG: ASK ALL

CV1. To start off with, we'd like to ask about the impact of the coronavirus pandemic, also known as covid-19, on your business. This will help to provide some context to the rest of your answers. Following the coronavirus outbreak, what is the current status of your business? Would you say that…

ADD IF NEEDED: **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
2. Business/work has reduced
3. Business/work has increased
4. We have paused work or temporarily closed
5. The business has permanently closed No longer have any business/work/permanently ceased (business has not been able to survive) – CLOSE INTERVIEW
6. [DO NOT READ OUT] Don't know **Position fixed *Exclusive*
7. [DO NOT READ OUT] Prefer not to say **Position fixed *Exclusive*

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

1. Yes, currently buys/imports
2. No

PROG: ASK ALL WHO SAY 'NO' AT S1a
S1b. Are you considering to in the future?

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

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

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

PROG: ASK ALL
S1d. <u>Have you previously</u> bought or imported products or services from companies based in the United Kingdom <u>within the last five years?</u>
PROG/INT: SINGLE CODE ONLY

1. Yes
2. No

3. (INT: DO NOT READ) Don't know

G: DUMMY VARIABLE FOR TRADE: 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)

PROG: ASK ALL
S2a. Does your organisation currently invest in other countries? By 'invest' we mean expanding ongoing operations or making a capital investment in another country either directly through your own organisation, or working in partnership with another.

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

1. Yes, currently invests abroad
2. No

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

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

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

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

PROG: ASK ALL
S2d. Have you previously invested in the UK within the last five years? (CLARIFY IF NECESSARY: Since [current month] 2015).
1. Yes
2. No
3. (INT: DO NOT READ) Don't know

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

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

PROG: 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)
INT: PROBE FOR BEST ESTIMATE.
PROG: OPEN-NUMERIC WITH TICK BOX [ ] FOR (DO NOT OFFER) Don't know

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

EXACT NUMBER	_____
Don't know	X
If providing estimate (SINGLE CODE ONLY)	
[DO NOT READ OUT] **1-9**	1
10-49	2
50-249	3
250-499	4
500-999	5
1,000-1,999	6
2,000 – 4,999	7
5,000 or more	8
(DO NOT READ OUT) Don't know / refused	9

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

ELSE CONTINUE

PROG: ASK ALL EXCEPT "NO TRADE" **AND** "NO INVEST"
S4. What was the organisation's approximate annual revenue/turnover in [local currency] in the last financial year? INT: PROBE FOR BEST ESTIMATE.

PROG: ASK IF "DON'T KNOW": **Is it around** [INSERT SAMPLE]**?**

Code at S4	USA (US$)	China (Chinese Yuan)	Japan (Japanese Yen)	French/ Germany (Euro)	UAE (Emirati Dirham)	India (Indian Rupee, in Crore)	Brazil (BRL)	South Africa (ZAR)	Turkey (TRY)
1	Under USD $ 2 mil	Under ¥14	Under ¥ 215 mil	Under EUR 1.75 mil	Under AED 7.5 mil	Under INR 14 crores	Under BRL 7.5 mil	Under ZAR 28 mil	Under TRY 11 mil
2	USD $2 mil - USD $10 mil	¥14 mil - ¥69 mil	¥200 mil - ¥ 1 bil	EUR 1.75 mil - EUR 9 mil	AED 7.5 mil - AED 40 mil	INR 14 cr - INR 70 cr	BRL 7.5 mil - BRL 37 mil	ZAR 28 mil - ZAR 139 mil	TRY 11 mil - TRY 57 mil
3	USD $10 mil - USD $50 mil	¥70 mil- ¥350 mil	¥ 1 bil - ¥ 5 bil	EUR 9 mil - EUR 45 mil	AED 40 mil - AED 185 mil	INR 70 cr – INR 350 cr	BRL 37 mil - BRL 190 mil	ZAR 139 mil - ZAR 693 mil	TRY 57 mil - TRY 285 mil
4	USD $50 mil - USD $100 mil	¥350mil - ¥700 mil	¥ 5 bil - ¥ 10 bil	EUR 45 mil - EUR 90	AED 185 mil - AED	INR 350 cr - INR 700 cr	BRL 190 mil - BRL	ZAR 693 mil - ZAR	TRY 285 mil - TRY

				mil	370 mil		370 mil	1.4 bil	570 mil
5	USD $100 mil - USD $500 mil	¥700 mil - ¥3.5 bil	¥10 bil - ¥50 bil	EUR 90 mil - EUR 450 mil	AED 370 mil - AED 1.85 bil	INR 700 cr - INR 3,500 cr	BRL 370 mil - BRL 1.9 bil	ZAR 1.4 bil - ZAR 6.9 bil	TRY 570 mil - TRY 2.8 bil
6	USD $500 mil - USD $1 bil	¥3.5 bil - ¥7 bil	¥50 bil - ¥100 bil	EUR 450 mil - EUR 900 mil	AED 1.85 bil - AED 3.7 bil	INR 3,445 cr- INR 7,000 cr	BRL 1.9 bil - BRL 3.7 bil	ZAR 6.9 bil - ZAR 13.8 bil	TRY 2.8 bil - TRY 5.7 bil
7	USD $1bn and over	¥7 bil and over	¥100 bil and over	EUR 900 mil and over	AED 3.7 bil and over	INR 7,000 cr and over	BRL 3.7 bil and above	ZAR 13.8 bil	TRY 5.7 bil and over
8	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused	(INT: DO NOT READ OUT) Don't know / refused

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

ELSE CONTINUE

PROG: USE THE S5 RESPONSE LIST AS PART OF DISPOSITION CODES (TO FEED INTO THE FIELDWORK UPDATES)
PROG: ASK ALL INELIGIBLE DUE TO "NO 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?
INT: DO NOT READ OUT. PROG: MULTI CODE OK, APART FROM DON'T KNOW.

	GENERAL REJECTION:
1	No interest in doing so/is not what we do
	REASONS NOT TO IMPORT:
2	Do not think there will be a demand for any 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
	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 19 ONWARDS.....

INT: THANK AND CLOSE ALL ANSWERING S5

PROG: ASK IF S1b = 1

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

PROG/INT: SINGLE CODE ONLY

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

PROG: ASK IF S2b = 1

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

PROG/INT: SINGLE CODE ONLY

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

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

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

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

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

PROG/INT: SINGLE CODE ONLY
PROMPT TO CODE

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

PROG: ADD VAR FOR GFEST 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

PROG: ASK ALL

UR1. Please think about anything you may have seen, read or heard in this calendar year 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 recently? Please exclude your own country

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

Australia	1
Brazil	2
Canada	3
China	4
Great Britain	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
United Kingdom/UK	18
Other (SPECIFY)	97
None	98
Don't know	99
Ireland	22

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

PROG: TIMESTAMP 2

SECTION B: TRADE AND INVESTMENT IN UK AND COMPETITORS

PROG: 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….

PROG/INT: SINGLE CODE ONLY.
INT: READ OUT SCALE FOR EACH COUNTRY LISTED.
PROG: REVERSE SCALE. PROG: RANDOMISE COUNTRY LIST. PLEASE INCLUDE A "DON'T KNOW" OPTION FOR EACH COUNTRY

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

PROG: ASK IF INVEST

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

PROG/INT: SINGLE CODE ONLY.
INT: READ OUT SCALE FOR EACH COUNTRY LISTED.
PROG: REVERSE SCALE. PROG: RANDOMISE COUNTRY LIST. PLEASE INCLUDE A "DON'T KNOW" OPTION FOR EACH COUNTRY

		A great deal	A fair amount	Not very much	Nothing at all
A	United Kingdom	1	2	3	4
C	Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS)	1	2	3	4

E	China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS)	1	2	3	4
F	The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS)	1	2	3	4
H	Japan (PROG: DO NOT DISPLAY FOR JAPAN RESPONDENTS)	1	2	3	4
L	Republic of Ireland	1	2	3	4
M	France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS)	1	2	3	4
N	Singapore	1	2	3	4

PROG: ASK B3 IF TRADE

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

PROG: RANDOMISE COUNTRY LIST.

		Not at all likely								Certain to	
		1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**(DO NOT READ OUT) Don't know**
A	United Kingdom	1	2	3	4	5	6	7	8	9	10	11
C	Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
E	China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
F	The United States of America (PROG: DO NOT DISPLAY FOR USA RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
H	Japan (PROG: DO NOT DISPLAY FOR JAPAN RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
L	Republic of Ireland	1	2	3	4	5	6	7	8	9	10	11
M	France (PROG: DO NOT DISPLAY FOR FRANCE RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11

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

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

PROG: MULTICODE EXCEPT DON'T KNOW/not applicable

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

	UK-SPECIFIC OBSTACLES:
4	Other countries provide better/faster products and services

5	Inefficient processes
6	Price is not competitive enough
7	Products/ services are not (widely) available
9	Credit facilities / credit rating criteria
10	Unfavourable exchange rates
11	Trade barriers / Requirement certifications
18	Uncertainty about UK leaving the EU/Brexit
17	Not applicable /not attractive to our sector
	PERCEIVED/POTENTIAL OBSTACLES:
1	No contact with (any company in) UK
2	Not aware of opportunities/ Have not considered UK sources yet
3	No promotion/information/not enough information on UK (and/or UK products or services)
8	Unsure about export tax issues / high taxes
	CULTURAL OBSTACLES:
12	Distance/ geographic location
13	Different cultures
14	Language barriers
	OTHER:
15	Other (SPECIFY)
16	Don't know
19	Environmental reasons
20	Covid-19 / coronavirus
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 19 ONWARDS…..

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

	UK-SPECIFIC ATTRACTIONS:
2	Good / mature supply base
4	Price
5	Value for money
6	Quality/ good products/service/efficiency
7	Product availability
8	Expertise/ long history in the field
11	Good technology / Innovation
13	It is a stable business environment/economy/developed country/good place to do business
17	Favourable exchange rates
23	Brexit opportunities
24	It is part of the European Economic Area

	COMPANY/HOME-COUNTRY RELATIONSHIP FACTORS:
1	Existing company / subsidiary in the UK
3	Presence of customers/Sufficient demand for products
9	Strong connection/ contact (including those who already work with the UK)
20	Funding
	AFFINITY/CULTURAL FIT:
10	Transparency of doing business
12	Trust/like the mentality of the people
14	Seriousness / good reputation
18	Geographic location / 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 24 ONWARDS…..

PROG: 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?

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

PROG: ASK ALL

B5d. Which organisation (or type of organisation), if any, would you be most likely to approach for help or advice on buying or importing goods or services from abroad? PROBE: What others?

PROG: MULTICODE EXCEPT DON'T KNOW/none
INT: DO NOT READ OUT

	IN DOMESTIC COUNTRY (WHERE RESPONDENT BASED):
2	Domestic country's chamber of commerce/trade association/industry body
3	Domestic country's government trade department/agency/embassy
8	Consultancies/Other private companies in domestic market

	IN TARGET COUNTRY:
4	Embassy/government of target country
13	Consultancies/Private companies in the target market
14	Target country's chamber of commerce/trade association/industry body
15	Target country's government trade department/agency/embassy
17	Target country's economic attaché
18	UK Embassy/government/DIT/UK Export Finance
19	UK trade association/industry body
	INTERNATIONAL ORGANISATIONS/SOURCES:
6	International trade association/industry body
	IN RESPONDENT'S OWN COMPANY:
9	Overseas office of the company
1	UK office of the company
5	Internal specialists within own company
	GENERAL SOURCES (LOCATION NOT SPECIFIED):
10	Banks
11	Export Credit Agencies
12	Personal networks/ existing contractual relationships/ Businesses community forum
7	Internet search for relevant companies
	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.....

PROG: ASK IF INVEST

B6. How likely, if at all, is it that your organisation <IF DO NOT CURRENTLY INVEST S2a=2: will start / IF CURRENTLY INVEST S2a=1: will continue> to expand or invest in the following countries <u>in the next three years</u>? (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.

PROG: RANDOMISE COUNTRY LIST.

		Not at all likely									Certain to	
		1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**(DO NOT READ OUT) Don't know**
A	United Kingdom	1	2	3	4	5	6	7	8	9	10	11
C	Germany (PROG: DO NOT DISPLAY FOR GERMANY RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
E	China (PROG: DO NOT DISPLAY FOR CHINA RESPONDENTS)	1	2	3	4	5	6	7	8	9	10	11
F	The United States of America (PROG:	1	2	3	4	5	6	7	8	9	10	11

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

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

	UK-SPECIFIC OBSTACLES:
4	Bureaucratic problems/ 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
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
	CULTURAL OBSTACLES:
13	Language issue
17	Physical safety/terror threat
	OTHER:
20	Environmental reasons
21	Covid-19 / coronavirus
18	Other (SPECIFY)
19	Don't know
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 20 ONWARDS…..

PROG: ASK IF CODE 6 TO 10 FOR UK (AT B6_A) = LIKELY TO EXPAND TO/INVEST IN UK
B6b. What are the main reasons why you are likely to expand to or invest in the UK? PROBE: What other reasons?

PROG: MULTI CODE (EXCEPT DK)
INT: DO NOT READ OUT

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

PROG: ASK IF INVEST
B6a1. Compared to 12 months ago, would you say that you are more or less likely to expand or invest in the UK?

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

Much more likely	**1**
A little more likely	**2**
No difference	**3**
A little less likely	**4**

	Much less likely	**5**
	Don't know INT: DO NOT READ OUT	**6**

PROG: ASK ALL

B7d Which organisation (or type of organisation), if any would you be most likely to approach for help or advice on buying products or services, expanding or investing to other countries? PROBE: What others?

PROG: MULTICODE EXCEPT DON'T KNOW

INT: DO NOT READ OUT

	IN DOMESTIC COUNTRY (WHERE RESPONDENT BASED):
1	Accounting/Insurance firms/ Legal/law firms/other private companies in domestic market
4	Bank/venture capital/investment management firm in domestic market
7	Domestic country's chamber of commerce/trade association/industry body
8	Domestic country's government trade department/agency/embassy
	IN TARGET COUNTRY:
3	Bank/venture capital in target market
5	Target country's Chamber of Commerce
6	Target country's Embassy/government
9	Embassy/government/agency/other public sector body of target country
14	Private companies in the target country
15	Target country's chamber of commerce/ trade association/industry body
16	Target market's trade association/industry body
	INTERNATIONAL/REGIONAL ORGANISATIONS/SOURCES:
19	Cooperation council (GCC / Gulf)
20	The IDC
	IN RESPONDENT'S OWN COMPANY:
10	Internal specialists within own company
	GENERAL SOURCES (LOCATION NOT SPECIFIED):
2	Consultancy agencies/companies
11	Internet search for relevant companies
12	Internet search for sector information/market
13	Personal networks
17	Visiting a trade show
	OTHER:
18	Depends on country
21	Others (SPECIFY)
22	Don't know
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 23 ONWARDS…..

PROG: TIMESTAMP 3

SECTION C: ASSOCIATION WITH KEY ATTRIBUTES

PROG: ASK ALL

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

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

PROG: ASK IF TRADE

C2_a. Now thinking about some factors which may influence decisions of whether to buy or import products and services from the UK. Please tell me how important you consider each of the following when it comes to making these decisions. Please rate using a scale of 1 to 10, where 1 is not important at all and 10 is absolutely essential.

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

IF TRADE

	TRADE	**Score (1-10)**
A	Reputation for providing innovative products or services	
B	High quality products and services	
C	Competitive pricing	
D	Working within a high quality, reliable infrastructure	
E	Reputation for providing creative products or services	
F	Open and welcoming to international business	
G	Ability to communicate in the same language	
~~**H**~~	~~Technologically Advanced~~	
I	Deliver a stable environment throughout the duration of the relationship	
J	Easy to ship goods	
K	Shares the same working values and practices as businesses in my country	
L	Environmentally friendly products and services	

PROG: IF TRADE AND NOT GERMANY OR FRANCE:

C2A2a/C2A2b. Now thinking about the same factors, how much do you associate each one with companies in PROGRAMMER: ALTERNATE ORDER OF <each of the United Kingdom and Germany> AND <each of Germany and the United Kingdom>?
Again please use a scale of 1-10, where 1 means you do not associate them at all with companies in this country, and 10 means you fully associate them with companies in this country.
READ OUT EACH STATEMENT, TAKING SCORE FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_a, 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

	TRADE	**Score (1-10) UK**	**Score (1-10) Germany**
A	Reputation for providing innovative products or services		
B	High quality products and services		
C	Competitive pricing		
D	Working within a high quality, reliable infrastructure		
E	Reputation for providing creative products or services		
F	Open and welcoming to international business		
G	Ability to communicate in the same language		
~~**H**~~	~~Technologically Advanced~~		
I	Deliver a stable environment throughout the duration of the relationship		
J	Easy to ship goods		
K	Shares the same working values and practices as businesses in my country		
L	Environmentally friendly products and services		

PROG: ASK IF TRADE AND GERMANY OR FRANCE
C2A2c/C2A2d. Now thinking about the same factors, how much do you associate each one with companies in PROGRAMMER: ALTERNATE ORDER OF <each of the United Kingdom and the USA> AND <each of the USA and the United Kingdom>? Again please use a scale of 1-10, where 1 means you do not associate them at all with companies in this country, and 10 means you fully associate them with companies in this country.

READ OUT EACH STATEMENT, TAKING SCORE FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_a, 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

	TRADE	**Score (1-10) UK**	**Score (1-10) 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	Ability to communicate in the same language		
~~**H**~~	~~Technologically Advanced~~		
I	Deliver a stable environment throughout the duration of the relationship		
J	Easy to ship goods		
K	Shares the same working values and practices as businesses in my country		
L	Environmentally friendly products and services		

PROG: ASK IF "INVEST"

C2_b. Now thinking about some factors which may influence decisions of where to expand operations or invest. Please tell me how important you would rate each of the following when it comes to making these decisions. Please rate using a scale of 1 to 10, where 1 is not important at all and 10 is absolutely essential.

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

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

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

C2B2a/C2B2b. Now thinking about the same factors, how much do you associate each one with PROGRAMMER: ALTERNATE ORDER OF <each of the United Kingdom and Germany> AND <each of Germany and the United Kingdom>? Again please use a scale of 1-10, this time where 1 means you do not associate them at all with this country and 10 means you fully associate them with this country.

READ OUT EACH STATEMENT, TAKING SCORE FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_b, 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

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

PROG: ASK IF INVEST AND GERMANY OR FRANCE
C2B2c/C2B2d. Now 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>? Again please use a scale of 1-10, this time where 1 means you do not associate them at all with this country and 10 means you fully associate them with this country.

READ OUT EACH STATEMENT, TAKING SCORE FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_b, 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

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

PROG: TIMESTAMP 4

SECTION D: CAMPAIGN AWARENESS – PROMPTED RECALL

PROG: ASK ALL

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

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

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

PROG: SINGLE CODE FOR EACH. RANDOMISE ORDER.

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

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

D2. **You said that you have seen/heard something promoting business opportunities in the United Kingdom.**

Can you recall where you saw/heard the United Kingdom being promoted?
INT: DO NOT READ/PROMPT.
PROG: MULTICODE (EXCEPT CAN'T REMEMBER)

	PRINT PRESS:
1	Advertisements in magazines, newspapers or trade press
2	Articles /photos in magazines, newspapers or trade press
	MEDIA:
3	TV advertisement
15	From a TV documentary/ in the news
4	On posters, billboards or outdoor advertising digital screens
	SOCIAL MEDIA SITES:
7	LinkedIn
8	Twitter

9	Facebook
26	Instagram
10	On other social networking sites (for example, Xing!,)
	OTHER ONLINE (SPECIFIC & GENERAL):
12	On a mobile application/App
5	Online advertisement / banner
6	Articles / photos online
	SPECIFIC VENUES/EVENTS:
13	At trade shows / events / conferences / exhibitions/ talks
14	At the airport
27	Webinar / virtual event
17	From/at the British Embassy/British Consulate
	SPECIFIC SOURCES:
18	From the national Government
19	Via an organisation representing businesses (For example, DIT, Chamber of Commerce)
20	Via UK Export Finance or a Trade finance organization
23	
24	
25	
	OTHERS:
16	From friends, family or colleagues
21	Other (SPECIFY)
22	Can't remember
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 27 ONWARDS…..

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

D3. What do you remember about what was being said about the United Kingdom, from what you saw or heard? PROBE IF NECESSARY: What do you remember about the advertising or promotional activity you saw/heard?

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

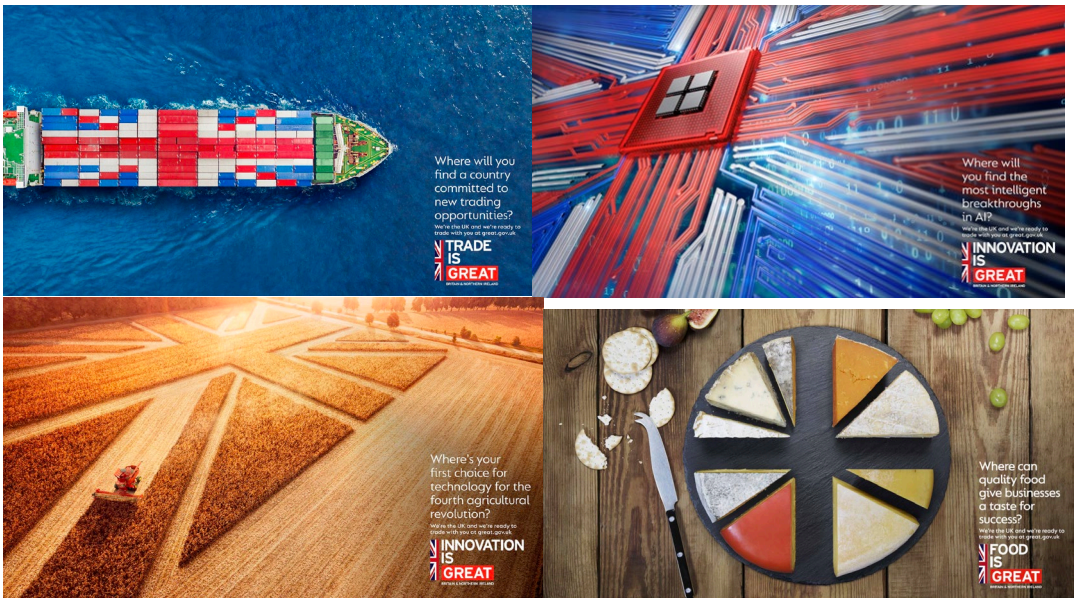
1. UK/Britain is a good place in which to invest (non-specific)
2. UK/Britain is a good place to trade with (non-specific)
3. UK/Britain is ready to trade
4. UK/Britain is **GREAT** to do business with (INT: NOTE SPECIFIC CAPITALISATION OF 'GREAT')
5. UK/Britain is a good place for business collaboration
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
12. Has good technology/place for technology
13. Green/environmentally-friendly business location
14. Other businesses are succeeding in the UK
15. I recall seeing messaging that is relevant to my sector
16. Tourism
17. Other (SPECIFY)
18. Don't know/not sure/can't remember

PROG: ASK ALL
D4. I would now like you to take a look at some visuals on a website and tell me if you have seen them or similar ones before – either at events or in the wider media such as newspapers, magazines or online. Is it possible for you to access a website on the internet at this present moment?

1. Yes – go to D4A
2. No – go to D4B

PROG: ASK IF CODE 1 AT D4 AND TRADE
D4ATRADE. Please go to [URL redacted] AND CLICK ON THE TRADE 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

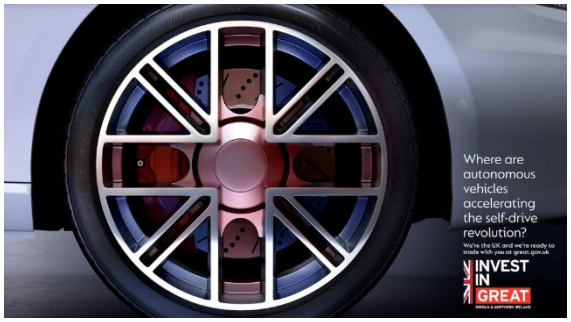


1. Yes, seen 1 or more of these
2. Yes, seen something similar with the GREAT logo
3. No, I have not seen anything like these
4. (DO NOT READ OUT) Don't know

PROG: ASK IF CODE 1 AT D4 AND INVEST
D4AINVEST. Please go to [URL redacted] AND CLICK ON THE INVEST CAMPAIGN PAGE FOR RELEVANT COUNTRY.
IF A COUNTRY SPECIFIC CAMPAIGN PAGE IS NOT AVAILABLE, PLEASE TELL THE RESPONDENT TO CLICK ON THE MAIN INVEST CAMPAIGN PAGE

<u>Have you seen either of these visuals, or others similar to these, before this interview</u>? Please note that some of the text may have been in another language
SINGLE CODE









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

PROG: ASK IF CODE 1 OR 2 AT D4ATRADE OR D4AINVEST
D4AI. Please can you give me a brief description of what you see on the screen?
INT: THIS IS A CHECK – PLEASE DO NOT READ OUT THE RESPONSES

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

PROG: ASK IF CODE 1 AT D4
D4AII. Please now click on the word 'Logo' on screen.
<u>Looking at these images, do you remember seeing either of these before today or any similar ones including the reference to 'GREAT'?</u> 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



INT: IF NECESSARY EXPLAIN: 'PROMOTIONAL MATERIALS' CAN INCLUDE THINGS LIKE LETTERHEAD, EVENT LOGOS

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

PROG: ASK IF CODE 2 AT D4 OR CODE 2 AT D4AI
D4B. Can you recall having seen, read or heard any advertising, events or promotion which states 'We are the UK and we are ready to trade with you', or which includes phrases using the word GREAT to promote 'Great Britain' as a place to do business with?
This might have included the phrases 'Innovation is GREAT', 'Creativity is GREAT' or 'Invest in GREAT'.
INTERVIEWER: BE EXPLICIT ABOUT 'GREAT'. SPELL OUT IF NECESSARY ("G-R-E-A-T").
These advertisements, events or promotional items include the words Britain and Northern Ireland and part of the red, white and blue union flag. They may also have included images relating to UK business.

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

DP: create dummy variables for GREAT recognisers

GREAT recognisers: CODE 1 OR 2 AT D4ATRADE OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4AII OR CODE 1 AT D4B

ASK ALL GREAT RECOGNISERS: (CODE 1 OR 2 AT D4ATRADE OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4ALL OR CODE 1 AT D4B)

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

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

	PRINT PRESS AD:
8	Print media / advertising
	OTHER MEDIA AD:
11	TV
20	On posters, billboards or outdoor advertising digital screens
	SOCIAL MEDIA SITES:
15	Twitter
16	LinkedIn
	OTHER ONLINE (NON-SPECIFIC):
12	Website / Online / Internet
13	Emails
	SPECIFIC PLACES/EVENTS:
2	Trade show / events / conferences / exhibitions / talks
9	British business centres, organisations (for example, British Chamber of Commerce, Consulate, Embassy)
6	Hotel
10	Airport
21	Central Business District (for example, Times Square, New York)
22	In an office
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: (CODE 1 OR 2 AT D4ATRADE OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4ALL OR CODE 1 AT D4B)

D5. When you originally saw any of this promotional activity, would you say it made you feel more positive or more negative towards investing in or trading with the United Kingdom, or did it make no difference?

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

PROG/INT: SINGLE CODE

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

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

D6. And from what you can remember about the GREAT Britain campaign activity, how much do you agree or disagree with the following statements?

Please give a score between 1 and 10 for each statement, where 1 would mean that you strongly disagree and 10 that you strongly agree with the statement.

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

		Strongly disagree									Strongly agree	
		1	2	3	4	5	6	7	8	9	10	(DO NOT READ OUT) Don't know
A	The advertising, events or promotional activity was different from promotions for other foreign business markets	1	2	3	4	5	6	7	8	9	10	11
B	IF INVEST: The advertising, events or promotional activity 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	The advertising, events or promotional activity told you something new about the UK	1	2	3	4	5	6	7	8	9	10	11
E	The advertising, events or promotional activity was relevant to you	1	2	3	4	5	6	7	8	9	10	11
F	The advertising, events or promotional activity 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): The advertising, events or promotional activity has had a direct impact on the amount of money your company has spent on procuring products and services from the UK (IF INVEST AND FROM JAPAN, CHINA): The advertising, events or promotional activity has had a direct impact on the amount of money your	1	2	3	4	5	6	7	8	9	10	11

	company has spent on investing in the UK.											

PROG: ASK IF REMEMBER SEEING ANY ADVERTISING/PROMOTION OF UK (VIA GREAT OR OTHER), CODE 1 OR 2 AT D4ATRADE OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4ALL OR CODE 1 AT D4B, CODE 1 AT D1 (FOR UK) OR CODES 5 OR 18 AT UR1

D6B. As a result of seeing this advertising, or any other promotions for the United Kingdom that you mentioned you had seen earlier, did you take any action?

PROG: SINGLE CODE

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

PROG: ASK IF D6B=1

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

PROG: MULTICODE (EXCEPT CAN'T REMEMBER)

INT: DO NOT READ/PROMPT

	ONLINE:
1	Visited the GREAT website
18	Downloaded an e-book from the GREAT website
2	Submitted an online query form
	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 (for example, regulations, tax, logistics, representatives)
14	Researched other aspects of the UK markets (for example, 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 18 ONWARDS…..

PROG: ASK ALL WHO RECALL/RECOGNISE GREAT (CODE 1 OR 2 AT D4ATRADE OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4AII OR CODE 1 AT D4B) AND WHO EITHER ALREADY INVEST/ TRADE IN UK OR ARE CONSIDERING DOING SO (TRADE OR INVEST) (S1a =1 OR S1c = 1 OR B3 (A) = 6-10 AND/OR S2a =1 OR S2c = 1 OR B6 (A) = 6-10

D6D. You mentioned earlier that
<IF S1c=1: you already trade with the UK /
IF S2c=1: you already invest in the UK /
IF S1c=1 AND S2c=1: you already trade with and invest in the UK /
IF S1c=2 AND B3_A=6-10: you are considering trading with the UK in the next 3 years /
IF S2c=2 AND B6_A=6-10: you are considering investing in the UK in the next 3 years >
.
To what extent would you say that your interest in trading or investing in the UK was a direct result of the GREAT Britain campaign activity that you saw before today. Would you say the advertising campaign …?

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

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

PROG: TIMESTAMP 5

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

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

INT, ADD IF NEEDED: **In this context, 'invest' can also include expanding an existing business or starting up a new business in another country.**
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

1. Business media (Bloomberg/Financial Times /Wall Street Journal/Economist)
2. Sector/industry specific publications/magazines
3. External consultancies/sources (KPMG, PWC etc)
4. Social media – LinkedIn
5. Social media – Facebook
6. Social media – Twitter
7. Social media – Weibo
8. Social media – WeChat
9. Social media -Other
10. Other online sources – search engines for example, Google, Baidu, Soso.com
11. Television – business news
12. Trusted industry experts
13. ~~Trade shows/events~~

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

PROG: ASK E3b2 TO ALL (INVEST AND 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?
PROG: MULTICODE (EXCEPT DK/NONE)
INT: DO NOT READ/PROMPT

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

PROG: ASK ALL WHO SELECT TWO OR MORE OF CODES 1-20 (INCLUSIVE) AT E3b2
E3. And which of the sources you just mentioned do you use most often to stay informed about your industry?
PROG: SHOW ONLY OPTIONS SELECTED AT E3b2. SINGLE CODE
INT: DO NOT READ/PROMPT

1. Business media (Bloomberg/Financial Times /Wall Street Journal/Economist)
2. Sector/industry specific publications/magazines
3. External consultancies/sources (KPMG, PWC etc)
4. Social media – LinkedIn
5. Social media – Facebook
6. Social media – Twitter
7. Social media – Weibo
8. Social media – WeChat
9. Social media- Other
10. Other online sources – search engines for example, Google, Baidu, Soso.com
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15. Business contacts outside your organization
16. Recommendations from friends/colleagues
17. Domestic government
18. Other countries' embassies
19. Bank/venture capitalist
20. Webinars / virtual events
21. Other (SPECIFY)
22. DK
23. None/Don't use

PROG: ASK ALL
NEW QUESTION SUGGESTION:

(Ask all traders)

G3A1: I am now going to read out some statements made by people in businesses like yours and for each one we would like you to tell us to what extent you agree or disagree with the statements.

To what extent do you agree or disagree that… [RANDOMISE OPTIONS]

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(DO NOT READ OUT) Don't know/can't remember
International growth is an exciting prospect for my business						
There is a lot of opportunity for my business to grow internationally						
There are too many risks in procuring internationally						
Covid-19 has made procuring internationally more difficult						

(Ask all investors).

G3A1b: I am now going to read out some statements made by people in businesses like yours and for each one we would like you to tell us to what extent you agree or disagree with the statements. Please use the following scale: agree strongly, agree slightly, neither agree nor disagree, disagree slightly, disagree strongly.

To what extent do you agree or disagree that… [RANDOMISE OPTIONS]

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	(DO NOT READ OUT) Don't know/can't remember
International growth is an exciting prospect for my business						
There is a lot of opportunity for my business to grow internationally						
There are too many risks in investing internationally						
Covid-19 has made investing internationally more difficult						

InfoG3A. In June 2016, UK citizens voted to leave the European Union (EU), a decision also known as "Brexit".

G3a. Would you say that the UK's departure from the European Union ("Brexit") has made you more or less likely to do any of the following, or has it made no difference?

PROG: DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE.

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

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

1. Much more likely
2. A little more likely
3. It has made no difference
4. A little less likely
5. Much less likely
6. (DO NOT READ OUT) Don't know

PROG: ASK ALL

G3b. The UK has left the European Union – Brexit – but we are now in a transition period during which the UK and EU will negotiate additional arrangements following the UK's departure from the EU. Which of the following best describes your current situation with regard to preparations for the end of the transition period? (CLARIFY IF NECESSARY: Brexit is the term commonly used to describe UK's exit from the European Union; nothing changes practically until the end of the transition period)?

(READ OUT, SINGLE CODE. ORDER REVERSED FOR 50% OF INTERVIEWS. DON'T READ OUT DK OR REFUSED)

1. My business has plans developed for the end of the transition period
2. My business is currently planning for the end of the transition period
3. My business is starting to plan for the end of the transition period
4. My business wants to start planning for the end of the transition period but we are not sure where to start
5. My business will not be affected by the end of the transition period and does not need to plan
6. Don't know (POSITION FIXED)
7. Refused

PROG: ASK ALL who select options 1-3 from G3b

G3c. What kind of action have you taken or are planning to take? (interviewers to code up all that apply)

1. Look at guidance on gov.uk
2. Look at guidance on great.gov.uk
3. Look at advice on your own government's website
4. Stockpile British goods
5. Apply for necessary licenses required to continue to trade with the UK
6. Check and prepare for new customs and VAT procedures at the border
7. Contact UK embassy in your country
8. Contact or engage with your local business representative organisation
9. Speak with UK businesses that you trade with
10. Support British staff working at your company with residency requirements
11. Check what tariffs will apply in event of no deal
12. Apply for a UK Economic Operator Registration and Identification number (EORI)
13. Check what trade agreements will apply in the event of a no deal
14. Contact the EU Exit Enquiry service
15. Other (please specify)
16. Don't know

Impact of coronavirus

ASK ALL
CV2. Thinking about the last year and the COVID-19 pandemic, to what extent would you say the way you invest or procure goods and services has changed as a result of COVID-19?

1. Continued the same as before
2. Reduced the level of investments, or volume of goods and services you procure
3. Increased the level of investments, or volume of goods and services you procure

ASK ALL
CV3. How, if at all, have your general perceptions of each of the following countries changed since the outbreak of COVID-19? 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. Republic of Ireland
g. Singapore
h. Great Britain or the United Kingdom, including England, Wales, Scotland and Northern Ireland

ASK ALL APART FROM CODE 5 AT CV3_UK
CV3a. You say that your general perceptions of the UK are [**IF 0-4 AT CV3:** more negative **/ IF 6-10 AT CV3:** more positive] **since the outbreak of COVID-19. Please can you explain in as much detail as possible why your general perceptions have changed?**

OPEN TEXT

ASK ALL
CV4: To what extent, if at all, would you say that the UK's response to the COVID-19 crisis has impacted on your inclination to trade with or invest in the UK after the COVID-19 pandemic is over? Please give a score between 0 and 10 where 0 would mean you are much less inclined to trade or invest with the UK because of the UK's response, 5 would mean the UK's response to the crisis has not made a difference and 10 would mean you are much more inclined to trade or invest with the UK because of the UK's response.

[SCALE 0-10]

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

If follow up research was being carried out for the Department for International Trade, would you be willing for us to pass your name, contact details and information from this survey to the Department for International Trade or another research organisation so they could contact you within the next 2 years?

If you are recontacted there will be no obligation to take part in any further research. If you do not take part in any future research your contact details will be deleted at the end of the 2 years.

PROG: SINGLE CODE

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

THANK AND CLOSE

gov.uk

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