

Department for
Business, Innovation,
Science and Trade

International Traders and Investors Study 2019

Technical report

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1 Methodology note

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

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

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

1.1 Objectives

The Department for International Trade (DIT) was responsible for developing trade and investment policies to support UK businesses overseas, and for helping UK businesses to export and attract investment.

At the time of the research, DIT ran 2 international business-to-business campaigns. These campaigns promoted opportunities for international buyers and investors in the UK. They were the Global Trade Campaign and the Invest in GREAT Britain Campaign. After this research, DIT launched the GREAT Ready to Trade Campaign. This brought together the investment and trade parts of the earlier campaigns with new campaign materials and a new approach.

The key research objectives of this study were:

- understanding 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
- assessing the relative effectiveness of the different channels and messages of the campaign
- measuring reactions to the campaign and identifying what the lessons are for the next phases of the campaign
- To meet these objectives, Populus conducted 2,501 interviews with businesses that could potentially trade with or invest in the UK. Fieldwork took place in 10 markets: France, Germany, United States of America (USA), Japan, China, India, United Arab Emirates (UAE), South Africa, Brazil and Turkey. Populus' fieldwork partner carried out the survey by computer-assisted telephone interviewing (CATI) between 20 September and 26 November 2019.

A previous wave of the International Traders and Investors Study was carried out in 2018 by IPSOS Mori. This means findings can be compared across 7 markets: France, Germany, the USA, Japan, China, India and the UAE. These comparisons are possible because the sample design

and questionnaire were consistent. The survey aimed to represent the GREAT international campaign priority audience. This means businesses that were likely to trade or invest internationally, not all businesses in each market. The study used the same sample frame and design in each market so findings could be compared. The method can also be repeated in future survey waves.

In 2019, the study used the same approach and proportions as the 2018 survey for the 7 markets included in both years.

1.2 Sampling

Sample population

The research focused on businesses that met these criteria:

1. profit-making organisations with annual turnover of at least $2 million. Public corporations, central government, local authorities, non-profit bodies and associations were excluded
2. had at least 10 employees across the whole organisation, including employees in other countries
3. had traded internationally before, or said they were likely to trade or invest internationally in the future

Businesses were included in the sample if they met the first 2 criteria. This information was in the sample frame. Interviewers checked this information at the start of each interview. They then used screening questions to check the third criterion.

Sample frame

The sample came from Dun and Bradstreet, a commercial international database of businesses. This sample frame was chosen because it matched the 2018 survey across the 7 common markets, covered each market well and would allow the same method to be used in future studies.

Sample design

This study was not designed to represent all businesses in the target markets. It was designed to represent businesses that met the 3 eligibility criteria: profit-making businesses with at least 10 employees, annual turnover of at least $2 million, and the potential to trade with or invest in the UK. This approach kept the survey consistent between 2018 and 2019.

This was a quota survey. Quotas were set by turnover and sector to reflect the business population in each market, and to match the profile achieved in 2018. During fieldwork, the team updated the quotas using the eligibility rates found in the sample. This helped set more accurate targets by size and sector.

The 2018 approach is summarised here.

In 2018, the team did not know before fieldwork how many businesses had previously traded or invested internationally, or were likely to do so. This varied by sector, size and market, so the team could not set exact quotas by turnover and sector in advance. Instead, quotas helped make sure that the businesses contacted reflected the sector profile of the Dun and Bradstreet sample frame in the key markets. Interviewers then used screening questions to check whether businesses met the third eligibility criterion and could take part in the survey.

Sample selection

In total, 151,660 businesses were selected from Dun and Bradstreet in 2019. Table 1 presents the total number of leads by market. South Africa and Turkey had lower numbers because the Dun and Bradstreet populations were smaller in these countries.

The sample for each market was split into random batches and released gradually during fieldwork. Further batches were released when interviewers had used the live sample. Each sample record had to be contacted at least 5 times, and more often in the USA and UAE, at different times and on different days of the week.

Table 1: Dun and Bradstreet records by market

Territory	Total
France	23,374
Germany	11,466
India	10,931
UAE	11,380
USA	15,788
China	12,195
Japan	40,101
South Africa	9,735
Brazil	10,142
Turkey	6,548
TOTAL	151,660

In each market, the sample was grouped by turnover and industry sector before selection. Dun and Bradstreet provided population data for profit-making businesses with at least 10 employees and annual turnover of at least $2 million. This included businesses without a telephone number in

the database. The sample also used the proportions achieved in 2018. Tables 2 and 3 present this information. During fieldwork, the team monitored the eligibility rate for each sector in each country and adjusted interview targets to reflect the rate found in the field. This helped each market reach the overall target of 250 interviews. Table 2: Dun and Bradstreet population profile by sector

Table 2: Dun and Bradstreet population profile by sector

	China		Japan		South Africa		India		Brazil	
Industry sector (1987 SIC)	N	%	N	%	N	N	%	N	%	N
A – Agriculture and Forestry and Fishing	56	0%	863	2%	290	56	0%	863	2%	290
B - Mining and Quarrying	144	1%	29	0%	97	144	1%	29	0%	97
C – Manufacturing	5730	47%	18757	47%	1883	5730	47%	1875 7	47%	1883
D – Electricity and Gas and Steam and Aircon	137	1%	12	0%	6	137	1%	12	0%	6
E – Water and Sewerage and Waste	73	1%	76	0%	2	73	1%	76	0%	2
F – Construction	1054	9%	2766	7%	858	1054	9%	2766	7%	858
G – Wholesale and Retail and Motor Repair	2478	20%	10436	26%	3335	2478	20%	1043 6	26%	3335
H – Transport and Storage	341	3%	1050	3%	88	341	3%	1050	3%	88
I – Accommodation and Food Service	264	2%	289	1%	118	264	2%	289	1%	118
J – Information and Communication	460	4%	502	1%	278	460	4%	502	1%	278
K – Finance and Insurance	456	4%	251	1%	1032	456	4%	251	1%	1032
L – Real Estate	364	3%	231	1%	103	364	3%	231	1%	103
M – Profession and Scientific and Technical	184	2%	362	1%	942	184	2%	362	1%	942
N – Admin and Support	13	0%	191	0%	6	13	0%	191	0%	6
P – Education	98	1%	344	1%	86	98	1%	344	1%	86
Q – Health and Social Work	187	2%	2925	7%	159	187	2%	2925	7%	159
R – Arts and Entertainment and Recreation	17	0%	82	0%	39	17	0%	82	0%	39
S – Other Services	140	1%	935	2%	413	140	1%	935	2%	413

	France		Germany		USA		UAE		Turkey	
Industry sector (1987 SIC)	N	%	N	%	N	%	N	%	N	%
A – Agriculture and Forestry and Fishing	119	1%	41	0%	179	1%	21	0%	44	1%
B – Mining and Quarrying	78	0%	16	0%	132	1%	101	1%	42	1%
C – Manufacturing	7656	33%	4286	37%	3740	24%	1758	15%	2363	36%
D- Electricity and Gas and Steam and Aircon	74	0%	71	1%	122	1%	24	0%	22	0%
E – Water and Sewerage and Waste	177	1%	46	0%	117	1%	10	0%	13	0%
F – Construction	1436	6%	401	3%	1455	9%	430	4%	246	4%
G – Wholesale and Retail and Motor Repair	7069	30%	3016	26%	4245	27%	6394	56%	2178	33%
H – Transport and Storage	1105	5%	245	2%	636	4%	341	3%	311	5%
I – Accommodation and Food Service	812	3%	66	1%	589	4%	154	1%	99	2%
J – Information and Communication	636	3%	321	3%	652	4%	262	2%	185	3%
K – Finance and Insurance	261	1%	460	4%	807	5%	601	5%	153	2%
L – Real Estate	496	2%	420	4%	326	2%	207	2%	28	0%
M – Profession and Scientific and Technical	1557	7%	723	6%	1132	7%	579	5%	295	5%
N – Admin and Support	354	2%	270	2%	0	0%	0	0%	7	0%
P – Education	129	1%	77	1%	289	2%	63	1%	48	1%
Q – Health and Social Work	468	2%	472	4%	513	3%	111	1%	147	2%
R – Arts and Entertainment and Recreation	166	1%	92	1%	284	2%	70	1%	30	0%
S – Other Services	781	3%	443	4%	571	4%	254	2%	337	5%

Table 3a: Dun and Bradstreet population profile by number of employees

	China		Japan		South Africa		India		Brazil	
Employee number	N	%	N	%	N	%	N	%	N	%
10-49	5,550	46%	14,275	36%	4,458	46%	4,805	44%	4,450	44%
50-249	5,112	42%	17,219	43%	4,041	42%	4,532	41%	4,284	42%
250-499	866	7%	4,506	11%	679	7%	857	8%	650	6%
500-999	260	2%	2,154	5%	311	3%	296	3%	295	3%
1000-1999	162	1%	1,248	3%	133	1%	199	2%	213	2%
2000-4999	133	1%	536	1%	85	1%	127	1%	170	2%
5000+	112	1%	147	<1%	28	<1%	115	1%	80	1%
	France		Germany		UAE		USA		Turkey	
Employee number	N	%	N	%	N	%	N	%	N	%
10-49	8,803	38%	4,020	35%	4,406	39%	5,609	36%	2,477	38%
50-249	8,688	37%	4,823	42%	4,519	40%	6,824	43%	2,636	40%
250-499	2,517	11%	1,090	10%	1,248	11%	1,824	12%	605	9%
500-999	1,251	5%	585	5%	458	4%	787	5%	301	5%
1000-1999	834	4%	423	4%	282	2%	392	2%	217	3%
2000-4999	626	3%	335	3%	214	2%	256	2%	162	2%
5000+	655	3%	190	2%	253	2%	96	1%	150	2%

Table 3b: Dun and Bradstreet population profile by annual turnover

	China		Japan		South Africa		India		Brazil	
Annual turnover	N	%	N	%	N	%	N	%	N	%
£2 million to £9.9 million	6,782	56%	18,797	47%	5,931	61%	7,802	71%	6,654	66%
£10 million to £49.9 million	2,560	21%	12,716	32%	2,732	28%	2,359	22%	2,208	22%
£50 million to £99.9 million	1,099	9%	3,660	9%	443	5%	399	4%	541	5%
100m-499.9m	1,231	10%	3,853	10%	368	4%	296	3%	540	5%
500m+	524	4%	1,060	3%	261	3%	75	1%	199	2%
	France		Germany		UAE		USA		Turkey	
Annual turnover	N	%	N	%	N	%	N	%	N	%
2m-9.9m	10,695	46%	5,652	49%	5,783	57%	7,584	48%	3,367	51%
10m-49.9m	6,612	28%	2,915	25%	2,576	26%	4,913	31%	2,036	31%
50m-99.9m	2,085	9%	1,070	9%	757	8%	1,450	9%	496	8%
100m-499.9m	2,459	11%	1,070	9%	687	7%	1,423	9%	438	7%
500m+	1,523	7%	759	7%	267	3%	419	3%	211	3%

1.3 Questionnaire design

The questionnaire was developed with the Department for International Trade (DIT). It was mainly based mainly on the 2018 version of the survey. The appendix includes the questionnaire.

The questionnaire was translated into local languages and was also available in English in all countries. Populus' fieldwork partner briefed interviewers in local languages. Interviewers also received written briefing notes, the survey questionnaire and a letter to send to respondents who wanted more information about the survey.

The average interview length, excluding the screening questions, was 26 minutes. Interviews ranged from 6 to 93 minutes. Table 4 presents the questionnaire length by market.

Table 4: Questionnaire length (excluding screening)

	Overall	France	Germany	India	USA	UAE	China	Japan	South Africa	Brazil	Turkey
Avg. length (min)	26	22	25	31	22	28	26	29	27	23	22

Questionnaire overview

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 that had not, and did 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

Respondents were classified as a 'trader' or 'investor' based on their survey response. They were then asked questions about their trade *or* investment plans and their views of the UK for trade or investment. The aim was to complete an equal number of interviews on trading and investing. Businesses that were both a prospective trader and investor were allocated to the group with fewer responses in that market.

Campaign materials

All respondents were asked to view a selection of campaign materials online during the interview to support recall. Prospective investors and traders were shown images from the Invest in GREAT Britain or International Trade campaigns, in local languages where needed.

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



Figure 1: 12 different examples of GREAT campaign material, including 'Think differently about technology', 'Think differently about creativity', 'Think differently about life sciences', 'For digital communications expertise, be where the world moves fastest', 'Base yourself in the FinTech capital of the world', and 'Grow your cyber business where global threats are outsmarted', 'Move your business to the UK. Where new technology comes to life', 'By 2035, AI is expected to add £644 billion to the UK economy', 'Making Britain top of mind for artificial intelligence', 'Build a smarter future for your business', 'Invest in GREAT' and 'Innovation is GREAT'.

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) was used in all countries. The survey scripting was carried out by Populus' fieldwork partner, fully supervised by Populus central programming team and local interviewing teams were supplied with secure access to the script for their market.

Interviewers were briefed by local 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 5: Sample outcomes

	Overall	France	Germany	India	USA	UAE	China	Japan	South Africa	Brazil	Turkey
Completed interviews	2,501	250	250	251	250	250	250	250	250	250	250
Sample called	116,882	18,554	10,955	10,739	15,489	11,144	12,136	13,950	9,591	9,613	4,709
Other live sample for example answer machine, busy line, no answer	57,047	10,321	4,235	5,257	8,192	5,369	7,188	4,526	5,528	4,268	2,163
Unreachable for example no such role, person away	2,885	196	454	218	328	520	400	65	165	355	184
Other dead sample for example private numbers, language problems, partially completed interviews	914	4	4	736	16	133	1	0	14	0	6

Soft appointments[1]	17,005	1,778	1,405	1,036	2,359	1,075	592	4,992	1,400	899	1,469
Hard appointments[2]	874	40	2	164	149	177	19	12	215	42	54
Maximum number of call attempts reached	841	33	42	164	53	376	52	4	44	61	11
Screen outs (that is ineligible)	9,811	985	1,735	533	665	352	964	2,704	646	926	301
Refusals	18,546	4,150	4,292	790	2,170	1,026	1,073	2,445	819	1,187	594
Unusable	8,960	82	100	1,160	889	2,089	964	20	916	2,648	92
Eligibility rate	20%	20%	13%	32%	27%	42%	21%	9%	28%	21%	45%
Co-operation rate[3]	38%	23%	31%	46%	28%	32%	52%	54%	50%	43%	43%

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 2018.

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.

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 and Real Estate; Professional, Scientific and Technical; Admin and Support; Education, Health and Social Work)

[1] 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.

[2] 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.

[3] Co-operation rate based on estimated eligibility (%) = completed interviews / (completed interviews + (refusal*eligibility rate))*100

- 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 6 presents the weighted and unweighted interviews by market.

Table 6: Weighted (w) and unweighted (u) sample profiles

	Manufacturing		Construction		Wholesale, retail, motor repair		Professional services		Other	
	w	u	w	u	w	u	w	u	w	u
China	126	145	10	13	44	44	26	25	44	23
Japan	157	128	5	10	64	69	2	19	22	24
South Africa	83	68	4	12	146	108	6	28	12	34
India	223	154	0	6	5	30	20	50	2	11
USA	125	101	8	11	69	76	12	31	34	31
France	104	104	5	12	95	70	11	30	35	34
Germany	129	118	2	9	60	71	36	23	23	29
UAE	46	42	4	12	163	127	22	36	14	33
Brazil	32	70	23	16	62	100	83	31	49	33
Turkey	17	58	1	9	108	121	100	32	25	30
TOTAL	1,042	988	62	110	816	816	318	305	260	282

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.[4] The impact of weighting for each market is shown in table 7 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).

[4] 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.

Table 7: Effective base sizes

	Total	China	Japan	India	USA	France	Germany	UAE	South Africa	Brazil	Turkey
TOTAL (unweighted)	2,501	250	250	251	250	250	250	250	250	250	250
Effective base size (post-weighting)	2,021	230	227	189	232	227	234	222	205	163	145
Maximum confidence interval (±%)	±2.0	±6.2	±6.2	±6.2	±6.2	±6.2	±6.2	±6.2	±6.2	±6.2	±6.2

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.

Populus undertook a number of analyses to better understand patterns in the data. Populus 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. Populus 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 the size, sector and market groups.

Size

Sub-group analysis was based on business turnover and size. Table 8 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 8: Breakdown of respondents by size and turnover

Turnover ($)	No:	Number of employees	No:
2,000,000 to 9,999,999	700	10 to 49	489

10,000,000 to 49,999,999	616	50-249	719
50,000,000 to 99,999,999	174	250 to 499	218
100,000,000 to 499,999,999	198	500 to 999	128
500,000,000+	63	1,000 to 1,999	79
		2,000 to 4,999	66
		5,000+	52

Sector

Table 9 shows the sector breakdown of businesses within the study. A representative sample of businesses in each market was initially obtained from the sample supplier, Dun and Bradstreet, also based on the proportions achieved in 2018. 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 2018.

Table 9: Breakdown of respondents by sector.

Sector	No:	Sector	No:
Agriculture, Forestry, Fishing	33	Information and Communication	87
Mining, Quarrying	9	Finance and Insurance	44
Manufacturing	1,042	Real Estate	17
Electricity, Gas, Steam and Aircon	10	Professional, Scientific, Technical	138
Water, Sewerage, Waste	7	Admin and Support	12
Construction	63	Education	1
Wholesale, Retail, Motor Repair	816	Health and Social Work	15
Transport, Storage	81	Arts, Entertainment, Recreation	8
Accommodation, Food Service	16	Other Services	101

Market

When interpreting overall findings, it is important to consider that the total findings presented are aggregated results from across the 7 priority consistent markets included in both the 2019 and 2018 surveys. This is also the case for the 10 market aggregated results for 2019 only. Almost equal numbers of interviews have been conducted in each market and each is given equal weight within the overall total (i.e. all markets have been treated equally in the weighting scheme regardless of their number of eligible businesses). The ‘total’ therefore reflects views across these 7 or 10 markets.

In most research studies, there will be an element of cultural bias which affects how people in different countries respond to survey questionnaires. This may affect responses to some extent, though in this study we believe that variations within the 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.

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 was 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).

Whilst 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, half of respondents were both. There were significantly more businesses that *only* traded/would consider trading (43%) compared to those that *only* invested/would consider investing (7%).

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.

In the overall sample, 1,291 respondents were classified as 'Traders' and asked questions relating to trade, whilst 1,210 were classified as 'Investors'.

Figure 2: Breakdown of respondents by international trading and investment activities

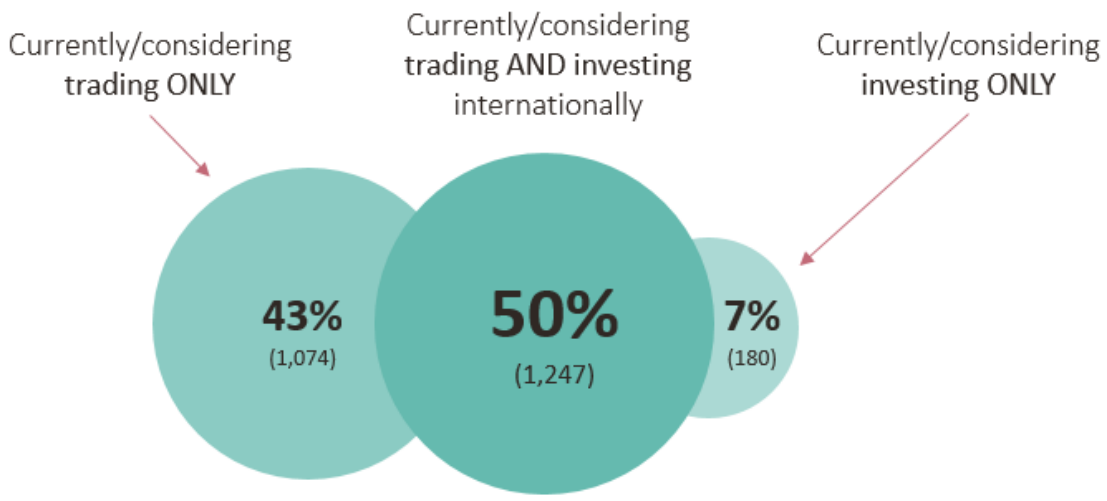


Figure 2: 50% of respondents were currently or considering both trading and investing internationally, whilst 43% were currently or considering trading only, and 7% were currently or considering investing only.

GREAT Recognition

As well as questions relating to UK business promotional activity more broadly, respondents were asked specifically about international B2B GREAT campaign material. Those who could access the internet at the point of interviewing were prompted with a selection of images taken from either the International Trade Campaign or the Invest in GREAT Britain and Northern Ireland campaign (shown to Traders/Investors accordingly) in local languages, as well as the over-arching campaign logo. Those without internet access were given a detailed description[5] of the promotional activity.

Whilst the images used and description given were tailored to the International Trade Campaign or the Invest in GREAT Britain and Northern Ireland campaign, it is possible that respondents may also be referring to other GREAT campaigns using similar imagery/messaging (such as those run by Visit Britain and the British Council).

[5] Campaign description read to those who could not access the web page at time of interview: *Can you recall having seen, read or heard any advertising, events or promotion 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.*

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 detailed Populus Terms and Conditions which can be found at https://www.populus.co.uk/terms-and-conditions.

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 Populus' fieldwork partner. All fieldwork was conducted centrally by the fieldwork partner from their call-centre in Stratford, East London. 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 Populus on a weekly basis; this report was run twice weekly in the event of any sample issues, with tele-conference calls to discuss with Populus 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 2019 before the fieldwork period included:

Whilst conscious of the need to track data consistently in the 2019 vs 2018 wave's dataset, the Word questionnaire underwent a collaborative and iterative assessment process between the fieldwork partner's Head of Quality Assurance and the Populus project lead, in collaboration with DIT. This ensured that any potential filtering/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.

- Questionnaire was scripted using NEBU software and tested by the CATI programmer and by the fieldwork partner's QA Department.
- Once the fieldwork partner had signed off the CATI script internally, a testable version of the script was made available to the Populus 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 Populus to retest until final sign-off.
- A dummy data-set 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 the team being coached as live via an in-built messaging system.
- Just under 10% of interviews were monitored via respondent-permissioned recordings (with some live shadowing of calls).
- Interviewer performance was assessed using the fieldwork partner's set of 25 quality KPIs, 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 Populus at 3 agreed milestones during fieldwork, to enable data checking and the feedback of amendments / additions / deletions / re-ordering etc. to be made before end of fieldwork, enabling final data to be sent as soon as possible after fieldwork completion.
    - Verbatims (specified 'Others') were supplied as a separate Excel document since lengthy verbatim comments can become truncated in SPSS exports.
- Final quality checks and base checks were undertaken on completion of fieldwork, and the final data file (plus verbatim file) was produced and delivered within 24 hours of fieldwork end.

3 Appendix

3.1 Questionnaire

GATEKEEPER INTRODUCTION

I1 Good morning/afternoon. I am calling from a research company called [fieldwork partner name]. We are working in partnership with Populus, an independent market research agency based in the UK who is conducting a research study on behalf of the British government (DIT). The aim of the study is to research views of companies in your country about the United Kingdom.

INT: STRESS AS NECESSARY

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

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 you don't currently invest abroad or buy products/services from companies abroad.**

PROG: SINGLE CODE ONLY

Named person speaking	READ OUT THE INTRO BELOW TO THE LIKELY-ELIGIBLE RESPONDENT:
Transferred	READ OUT THE INTRO BELOW TO THE LIKELY-ELIGIBLE RESPONDENT:
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

INTRODUCTION FOR LIKELY-ELIGIBLE RESPONDENT:

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 British Government (DIT – Department of International Trade) about businesses' perceptions of international trade and foreign investment. It will take about 20 minutes.**

INT: OFFER TO SEND EMAIL-LETTER IF NECESSARY, BUT PROCEED TO SCREENING (ESPECIALLY I4) AS SOON AS POSSIBLE

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:IF POSSIBLE COLLECT NAME and NUMBER OF A REFERRAL AND ASK FOR TRANSFER)	NEW CALL
Refused	THANK AND CLOSE

NEW SCREEN:

Privacy INT: READ OUT IN FULL:

Before we start 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 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 [http://dit.populus.co.uk], and I can arrange a time to call you back.

Respondent happy to start interview	GO TO Recording Consent
Email respondent first (or leave time to check Populus privacy policy)	FIX APPOINTMENT TO RE-CONTACT

NEW SCREEN:

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

NEW SCREEN:

Intro0 ***[[fieldwork partner name] SAFETY-FIRST QUESTION: ONLY ASKED AT INTERVIEWER DISCRETION E.G. 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

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?

INT: IF NECESSARY CLARIFY: That is, are you considering buying or importing products or services from companies based abroad in the future?

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

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

S1c Does your organisation currently buy or import products or services from companies based in the United Kingdom?

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

PROG: ASK ALL

S1d Have you previously bought or imported products or services from companies based in the United Kingdom within the last five years?

PROG/INT: SINGLE CODE ONLY

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

DUMMY VARIABLE FOR RADE: S1 = (1 OR 2) OR S1a = (1 OR 2)
PROG: CREATE DUMMY VARIABLE FOR ROUTING:

TRADE: S1a = (1) OR S1b = (1) OR S1c = 1 OR S1d = 1

NO TRADE: S1a = (2) AND S1b = (2 OR 3) AND S1c = 2 AND S1d = (2 OR 3) TRADE: S1 = (3 OR 4) AND S1a = (3 OR 4)

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?

PROG/INT: SINGLE CODE ONLY

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 and 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)

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?**

INT: PROMPT BANDS IF NECESSARY: ESTIMATE IS ESSENTIAL

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 <CURRENCY OF RESPONDENT COUNTRY> in the last financial year? INT: PROBE FOR BEST ESTIMATE.

PROG: ASK IF "DON'T KNOW":

S4Coded INTERVIEWER: PLEASE CODE CAREFULLY BELOW

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

INT: PROMPT BANDS IF NECESSARY: ESTIMATE IS ESSENTIAL

Code at S4	USA (US$)	China (Chinese Yuan)	Japan (Japanese Yen)	French/ Germany (Euro)	UAE (Emirati Dirham)	India (Indian Rupee, in Crore)	Brazil (BRL)	South Africa (ZAR)	Turkey (TRY)
1	Under USD $ 2 mil	Under ¥14 mil	Under ¥ 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	¥215 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	¥350mil - ¥700 mil	¥5 bil - ¥ 10 bil	EUR 45 mil - EUR	AED 185 mil - AED	INR 350 cr - INR	BRL 190 mil - BRL	ZAR 693 mil - ZAR	TRY 285 mil - TRY

	$100 mil			90 mil	370 mil	700 cr	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 3,500 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 (time zones/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:
18	Other
19	Don't know

FURTHER ADDITIONS TO THIS LIST (IF ANY) - NUMBER FROM CODE 20 ONWARDS…..

INT: THANK AND CLOSE ALL ANSWERING S5

NO S6

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 and Aircon	4
E- Water + Sewerage + Waste	5
F -Construction	6
G – Wholesale + Retail + Motor Repair	7
H – Transport + Storage	8
I – Accommodation + Food Service	9
J – Information + Communication	10
K – Finance + Insurance	11
L - Real Estate	12
M – Professional + Scientific + Technical	13
N – Admin + Support	14
P - Education	15
Q – Health + Social Work	16

R – Arts + Entertainment + Recreation	17
S - Other Services (SPECIFY FULLY) _____	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 the last few months which was promoting foreign business opportunities in another country (such as foreign investments or opportunities to buy products and services from organisations in that country).**

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

For which countries, if any, can you recall seeing such promotion recently? Please exclude your own country

INT: DO NOT READ OUT. MULTICODE POSSIBLE. IF RESPONDENT MENTIONS BRITAIN/GREAT BRITAIN USE CODE 5, IF MENTIONS UK/UNITED KINGDOM USE CODE 18

PROG: MULTICODE OK. 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)	19
None PROG: EXCLUSIVE	20
Don't know PROG: EXCLUSIVE	21
Ireland	22
Morocco	23
Netherlands	24
Poland	25
Portugal	26
Taiwan	27
Thailand	28
Turkey	29
Vietnam	30

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 FROM LIST BELOW]? 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 FROM LIST BELOW]? Would you say….READ OUT RESPONSE OPTIONS

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>?

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 – DO NOT READ OUT, BUT PLEASE PROBE FULLY FOR AS MUCH DETAIL AS POSSIBLE.

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
	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 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: MULTICODE POSSIBLE

	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
15	It is part of the EU / EU-related benefits
17	Favourable exchange rates
23	Brexit opportunities
	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 zones
19	Common language/ English language
	UK PUBLICITY:
16	Events with informative content
	OTHER:
21	Other(SPECIFY)
22	Don't know
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 24 ONWARDS…..

PROG: ASK IF TRADE:

B3b REMOVED FOR 2019

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 <u>from abroad</u>? PROBE: What others?

PROG: MULTICODE EXCEPT DON'T KNOW/none

INT: DO NOT READ OUT: MULTICODE POSSIBLE

	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
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 is it, if at all, that your organisation <IF DO NOT CURRENTLY INVEST S2a=2: will start / IF CURRENTLY INVEST S2a=1: will continue> to expand or invest in the following countries in the next three years? Please give a score between 1 and 10 where 1 would mean you are not at all likely and 10 that you are certain to.

PROG: RANDOMISE COUNTRY LIST.

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

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

B6a What are the main reasons why you would be unlikely to expand to or invest in the UK?... **PROBE: What other reasons?**

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

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:
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 – MULTICODE POSSIBLE

	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 business / easy to 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:
20	Other (SPECIFY)
21	Don't know/ Not applicable
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 23 ONWARDS (CODE 22 ADDED FOR 2019)…..

PROG: ASK IF INVEST

B6a1 QUESTION REMOVED FOR 2019

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 from, expanding to or investing in other countries? PROBE: What others

PROG: MULTICODE EXCEPT DON'T KNOW

INT: DO NOT READ OUT – MULTICODE POSSIBLE

	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
9	Government / agency / other public sector body of target country
14	Private companies in the target country
15	Target country'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 expanding or investing into the UK… how favourable or unfavourable are you towards the UK as a whole…? Would you say….READ OUT RESPONSE OPTIONS

PROG: REVERSE ORDER PER INTERVIEW (CODES 1-5)

Very favourable	**1**
Somewhat favourable	**2**
Neither favourable nor unfavourable	**3**
Somewhat unfavourable	**4**
Very unfavourable	**5**
(DO NOT READ OUT) Don't know	**6**

PROG: ASK IF TRADE

C2_a Now thinking about some factors which may influence decisions about 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 USE CODE 11 IF "DON'T KNOW"

IF TRADE

	TRADE	**Score (1-10: 11 FOR DK)**
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~~ [REMOVED FOR 2019]	
I	Delivers 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 your country	

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, ONE PER SCREEN. RANDOMISE ORDER IN WHICH UK OR GERMANY IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW).

ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

	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~~ [REMOVED FOR 2019]		
I	Delivers 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 your country		

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, ONE PER SCREEN. RANDOMISE ORDER IN WHICH UK OR USA IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW).

ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

	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~~ [REMOVED FOR 2019]		
I	Delivers 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 your country		

PROG: ASK IF "INVEST"

C2_b Now thinking about some factors which may influence decisions about 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 USE CODE 11 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	

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, where 1 means you do not associate them at all with this country and 10 means you fully associate them with this country.

READ OUT EACH STATEMENT, TAKING SCORE FOR EACH COUNTRY SEPARATELY

PROG: PRESENT STATEMENTS IN SAME RANDOM ORDER AS AT C2_b, ONE PER SCREEN. RANDOMISE ORDER IN WHICH UK OR GERMANY IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW).

ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

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

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, ONE PER SCREEN. RANDOMISE ORDER IN WHICH UK OR USA IS ASKED FIRST (FIXED RANDOM ORDER PER INTERVIEW).

ALSO PROGRAM CODE 99 (DO NOT READ OUT) Don't know

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

PROG: ASK ALL

C3 REMOVED FOR 2019

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 in newspapers or magazines, articles read in newspapers or magazines, received via email, etc.

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: 'NO BROWSE-BACK' POINT PROGRAMMED HERE (TO PREVENT ERRORS IN CALCULATIONS)

PROG: ASK D2 IF UK/GREAT BRITAIN MENTIONED AT UR1 (CODES 5 OR 18) AND/OR AT D1 (YES FOR STATEMENT 1 [D1_1 = CODE 1])

D2 **You said** <PROG: IF D1_1 = 2 OR 3 AND UR1 = 5 AND/OR 8: **earlier in the interview**> **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 – MULTICODE POSSIBLE

PROG: MULTICODE (EXCEPT CAN'T REMEMBER)

	PRINT PRESS:
1	Advertisements in magazines, newspapers or trade press
2	Articles /photos in magazines, newspapers or trade press
	MEDIA:
3	TV advertisement
15	From a TV documentary/ in the news
4	On posters, billboards or outdoor advertising digital screens
	SOCIAL MEDIA SITES:
7	LinkedIn
8	Twitter
9	Facebook
26	Instagram
10	On other social networking sites (e.g. Xing!,)
	OTHER ONLINE (SPECIFIC and GENERAL):
11	On YouTube
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

17	From/at the British Embassy/British Consulate
25	GREAT Festival of Innovation in Hong Kong in 2018
	SPECIFIC SOURCES:
18	From the national Government
19	Via an organisation representing businesses (e.g. DIT, Chamber of Commerce)
20	Via UK Export Finance or a Trade finance organization
23	~~GREAT Festival of Creativity in Shanghai in 2015~~ [REMOVED FOR 2019]
24	~~Milan Expo 2015~~ [REMOVED FOR 2019]
	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 [D1_1 = CODE 1])

D3. What do you remember about 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 – MULTICODE POSSIBLE

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 **GREAT** to do business with (INT: NOTE SPECIFIC CAPITALISATION OF 'GREAT')

4. Creativity/creative place

5. Innovation/innovative place

6. Entrepreneurial/encourages entrepreneurs/welcomes entrepreneurs

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

8. Open place to do business

9. Has good technology/place for technology

10. Green/environmentally-friendly business location

11. Other businesses are succeeding in the UK

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

13. Tourism

14. Other (SPECIFY)

15. 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**TRADE** OR D4A**INVEST**

2. No – go to D4B

PROG: ASK IF CODE 1 AT D4 AND TRADE

D4ATRADE**. Please go to** http://dit.populus.co.uk **and click on the 'Trade' campaign page at the top**

ALLOW RESPONDENT A FEW MOMENTS TO ACCESS AND VIEW THE PAGE, THEN ASK:

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 - PROBE BETWEEN CODES 1 AND 2 AS NECESSARY

NEW IMAGES FROM DIT TO COME

1. Yes, seen one or more of these

2. Yes, seen something similar with the GREAT logo

3. No, I have not seen anything like these

4. (DO NOT READ OUT) Don't know

PROG: ASK IF CODE 1 AT D4 AND INVEST

D4AINVEST**. Please go to** http://dit.populus.co.uk **and click on the 'Invest' campaign page tab at the top:**

IF A COUNTRY SPECIFIC CAMPAIGN PAGE IS NOT AVAILABLE, PLEASE TELL THE RESPONDENT TO CLICK ON THE MAIN 'Invest' CAMPAIGN PAGE

ALLOW RESPONDENT A FEW MOMENTS TO ACCESS AND VIEW THE PAGE, THEN ASK:

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

SINGLE CODE – PROBE BETWEEN CODES 1 AND 2 AS NECESSARY

NEW IMAGES FROM DIT TO COME

1. Yes, seen one or both 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 CODE 1 OR 2 AT 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.

NEW IMAGES FROM DIT TO COME

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

SINGLE CODE - PROBE BETWEEN CODES 1 AND 2 AS NECESSARY

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

PROG: ASK IF CODE 2 AT D4 OR CODE 2 AT D4AI [RESPONDENT CANNOT GO ONLINE TO VIEW **<u>OR</u>** GIVES INACCURATE DESCRIPTION OF INVEST OR TRADE VISUALS]:

D4B. READ OUT IN FULL: Can you recall having seen, read or heard any advertising, events or promotion 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. (DO NOT READ OUT) Don't know/not sure (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 D4AII 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 - MULTICODE POSSIBLE

	PRINT PRESS AD:
8	Print media / advertising
	OTHER MEDIA AD:
11	Other advertising - TV, radio, cinema, restaurant, supermarket
4	Department of International Trade advertisement
	SOCIAL MEDIA SITES:
14	Facebook
15	Twitter
16	LinkedIn
17	Other social media
	OTHER ONLINE (NON-SPECIFIC):
12	Website / Online / Internet
13	Emails
	SPECIFIC PLACES/EVENTS:
1	GREAT Festival of Innovation (Hong Kong 2018)
3	~~GREAT Festival of Creativity (Shanghai 2015)~~ [REMOVED FOR 2019]
2	Trade show / events / conferences / exhibitions / talks

9	British business centres, organisations (e.g. British Chamber of Commerce, Consulate, Embassy)
6	Hotel
10	Airport
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 D4AII 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 D4AII 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: RECORD 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 company has spent on investing in the UK.	1	2	3	4	5	6	7	8	9	10	11

PROG: ASK IF REMEMBER SEEING ANY ADVERTISING/PROMOTION OF UK (VIA GREAT OR OTHER):

CODE 1 OR 2 AT D4ATRADE OR 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4AII 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 – MULTICODE POSSIBLE

	ONLINE:
1	Visited 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 / investment opportunities (not GREAT website specific)
13	Researched rules/regulations of doing business with the UK (e.g. regulations, tax, logistics, representatives)
14	Researched other aspects of the UK markets (e.g. demand, competitors, customers, distribution channels, promotion or visited the country)
	OTHER SPECIFIC ACTIONS:
7	Bought from a British supplier
8	Attended a DIT event
9	Attended a general event because UK were present
	OTHER:
17	Other (SPECIFY)
15	No action taken PROG: *EXCLUSIVE CODE*
16	Don't Know PROG: *EXCLUSIVE CODE*
	FURTHER ADDITIONS TO THIS LIST - NUMBER FROM CODE 18 ONWARDS…..

PROG: ASK ALL GREAT RECOGNISERS WHO RECALL/RECOGNISE GREAT (CODE 1 OR 2 AT D4ATRADE OR CODE 1 OR 2 AT D4AINVEST OR CODE 1 OR 2 AT D4AII OR CODE 1 AT D4B) AND ALSO WHO EITHER ALREADY INVEST/ TRADE IN UK OR ARE CONSIDERING DOING SO (TRADE OR INVEST)

(S1c = 1 OR B3 (A) = 6-10 AND/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: READ OUT ALL 5 OPTIONS, SINGLE CODE.

PROG: 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 D4GFEST – GREAT FESTIVAL OF INNOVATION QUESTIONS – REMOVE FOR 2019

PROG: TIMESTAMP 6**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 – PROBE, MULTICODE POSSIBLE

1. Business media (Bloomberg/Financial Times /Wall Street Journal/Economist)
2. Sector/industry specific publications/magazines
3. External consultancies/sources (KPMG, PWC etc)
4. Social media – LinkedIn
5. Social media – Facebook
6. Social media – Twitter
7. Social media – Weibo
8. Social media – WeChat

9. Social media -Other
10. Other online sources – search engines e.g. Google, Baidu, Soso.com
11. Television – business news
12. Trusted industry experts
~~13. 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. Other (SPECIFY)
21. DK
22. 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 – PROBE, MULTICODE POSSIBLE

1. Business media (Bloomberg/Financial Times /Wall Street Journal/Economist)
2. Sector/industry specific publications/magazines
3. External consultancies/sources (KPMG, PWC etc)
4. Social media – LinkedIn
5. Social media – Facebook
6. Social media – Twitter
7. Social media – Weibo
8. Social media – WeChat
9. Social media- Other
10. Other online sources – search engines e.g. Google, Baidu, Soso.com
11. Television – business news
12. Trusted industry experts
~~13. Trade shows/events~~ [REMOVED FOR 2019]
23. Domestic trade shows/ events [ADDED FOR 2019]
24. International trade shows/ events [ADDED FOR 2019]

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. Other (SPECIFY)
21. DK
22. None/Don't use

PROG: ASK ALL WHO SELECT TWO OR MORE OF CODES 1-20, 23, 24 (INCLUSIVE) AT E3b2

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

PROG: SHOW ONLY OPTIONS SELECTED AT E3b2, PLUS CODE 21 (DK) . SINGLE CODE

INT: DO NOT READ/PROMPT – SINGLE CODE

1. Business media (Bloomberg/Financial Times /Wall Street Journal/Economist)
2. Sector/industry specific publications/magazines
3. External consultances/sources (KPMG, PWC etc.)
4. Social media – LinkedIn
5. Social media – Facebook
6. Social media – Twitter
7. Social media – Weibo
8. Social media – WeChat
9. Social media- Other
10. Other online sources – search engines e.g. Google, Baidu, Soso.com
11. Television – business news
12. Trusted industry experts
~~13. Trade shows/events~~ [REMOVED FOR 2019]
23. Domestic trade shows/ events [ADDED FOR 2019]

24. International trade shows/ events [ADDED FOR 2019]

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. Other (SPECIFY)
21. DK
~~22. None/Don't use~~

PROG: ASK ALL

G3: REMOVED FOR 2019

PROG: ASK ALL

NEW QUESTION SUGGESTION:

PROG: ASK ALL TRADE

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 statement.

To what extent do you agree or disagree that…

READ OUT FIRST STATEMENT, THEN PROBE FOR EXTENT OF AGREEMENT/DISAGREEMENT

IF AGREE: Is that agree strongly or agree slightly?

IF DISAGREE: Is that disagree strongly or disagree slightly?

PROG: RANDOMISE OPTIONS

	Agree strongly 5	Agree slightly 4	Neither agree nor disagree 3	Disagree slightly 2	Disagree strongly 1	(DO NOT READ OUT) Don't know/can't remember 6
International growth is an exciting prospect for your business						
There is a lot of opportunity for your business to grow internationally						
There are too many risks in procuring internationally						

PROG: ASK ALL INVEST

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 statement.

To what extent do you agree or disagree that…

READ OUT FIRST STATEMENT, THEN PROBE FOR EXTENT OF AGREEMENT/DISAGREEMENT

IF AGREE: Is that agree strongly or agree slightly?

IF DISAGREE: Is that disagree strongly or disagree slightly?

PROG: RANDOMISE OPTIONS

	Agree strongly 5	Agree slightly 4	Neither agree nor disagree 3	Disagree slightly 2	Disagree strongly 1	(DO NOT READ OUT) Don't know/can't remember 6
International growth is an exciting prospect for your business						
There is a lot of opportunity for your business to grow internationally						
There are too many risks in investing internationally						

PROG: ASK ALL:

G3a. READ OUT: In June 2016, UK citizens voted to leave the European Union (EU), a decision also known as "Brexit".

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

IF MORE LIKELY: Is that much more or a little more likely?
IF LESS LIKELY: Is that much less 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: DISPLAY STATEMENTS, RANDOMISE. SINGLE CODE.

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

PROG: ASK ALL

G3b. Which of the following best describes your current situation with regard to preparations for the UK to leave the European Union – i.e. Brexit? (CLARIFY IF NECESSARY: Brexit is the term commonly used to describe UK's exit from the European Union)

READ OUT, SINGLE CODE.
PROG: ORDER REVERSED FOR 50% OF INTERVIEWS.**)**

1. Your business has plans developed for Brexit
2. Your business is currently planning for Brexit
3. Your business is starting to plan for Brexit
4. Your business wants to start planning for Brexit but you are not sure where to start
5. Your business is not going to start planning for Brexit until the nature of the exit has been agreed by the UK Government
6. Your business will not be affected by Brexit and does not need to plan
7. (DO NOT READ OUT) Don't know (POSITION FIXED)
8. (DO NOT READ OUT) Refused (POSITION FIXED)

PROG: ASK IF SELECT OPTIONS 1-3 FROM G3b

G3c. What kind of action have you taken or are you planning to take (in preparation for Brexit)?

INT: DO NOT PROMPT, PROBE AND CODE 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 (SPECIFY)
16. Don't know

PROG: ASK ALL

G4 That concludes the interview, many thanks for your help and input today, on behalf of [fieldwork partner name] and our partners Populus, and also the British Government (DIT). Your responses will be processed anonymously as aggregate (grouped) data only.

DIT may wish to contact you to take part in further research on this topic in the next 12 months. Would you be happy for us to send Department for International Trade (DIT) a record of your name, company name, and your email address OR telephone number to contact you about future research?

DIT would only hold these details on record for 12 months and would only use them for the sole purpose of contacting you as part of research on the same topic on behalf of the British Government. If you agree to this, your details would be transferred securely to DIT by [fieldwork partner name], via Populus. Please be assured that if you say yes this does NOT affect the anonymity of your responses today.

PROG: SINGLE CODE

1. Yes – name, company name and email: SPECIFY ON NEXT SCREEN

2. Yes – name, company name and telephone: SPECIFY ON NEXT SCREEN

3. No – I do not wish to be contacted by DIT for further research

THANK AND CLOSE

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