

2023

A View from Corporate Europe:

Winning Strategies

in Investment Promotion Marketing

A STUDY BY

CSTUDIOS

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Executive Summary

New geopolitical threats, changing workforce dynamics in the wake of COVID-19, and a massive shift in the balance of talent-employer relations have created a challenging new playing field for investment promotion agencies. In this inaugural report, we aim to capture current sentiment from European corporate executives about the priorities driving their investment decisions, how they formulate perceptions that influence those decisions and what information they seek during the process. This report is modelled after that of a similar title in the U.S., conducted by New York-based place marketing firm Development Counsellors International (DCI), but focused on the North American market.

With the launch of C Studios, a joint venture between DCI and Belfast-based OCO Global, a new iteration of Winning Strategies shifts its focus to the European market and provides investment promotion agencies (IPAs) insight into the decision-

making mindset of European companies when looking to relocate or expand their operations.

The primary purpose is to inform best practices in attracting corporate investment. Key findings from the European executive audience, based on the aggregate responses, are:

- The outlook for investment is strong with a majority of respondents reporting they will make a location decision in the next 24 months
- 88% of respondents anticipate outsourcing a portion of the site selection responsibilities in their next location
- 70% of respondents report they are “likely” or “extremely likely” to visit an IPA’s website during their next location search

- Most important information on an IPA’s website includes:
 - o tax & incentives
 - o demographics
 - o searchable database of available sites and buildings
- Top sources influencing perceptions about a location are dialogue with industry peers and meetings with investment promotion agencies (IPAs)
- Among those who favor advertising as a marketing technique, digital advertising and sponsored content is highly favored over other mediums
- An internet/website presence is rated as the most-effective marketing technique
- Top news sources are:
 - o Financial Times
 - o BBC
 - o The Economist
- 76% of respondents used the internet during their last site-selection search
- LinkedIn is the top-used social media outlet for business
- The availability of skilled workers and a business-friendly government are the top “must have” factors during a site selection project
- Germany was selected as the country with the most-favourable business climate

In rapidly changing times with constantly evolving political, economic and social conditions, this study represents a snapshot in time. However, this information on priority factors during the decision process, how perceptions of locations are formed and how executives prefer to be communicated with are vital for investment promotion agencies to understand as they look to market to corporate executives.



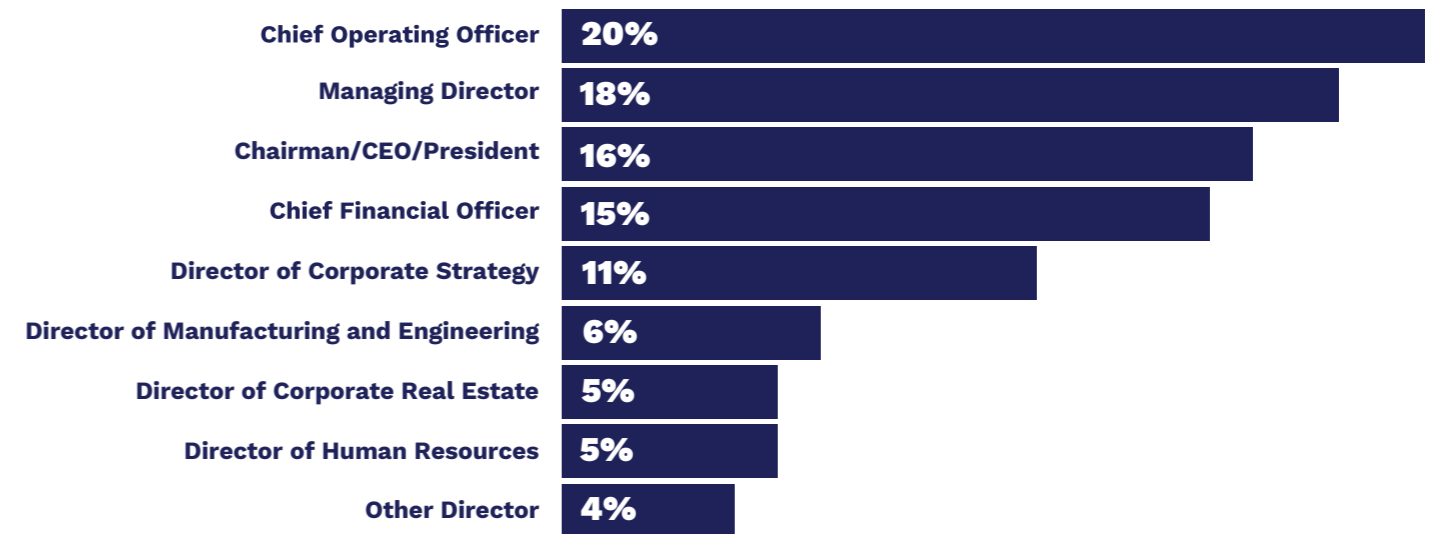
Introduction and Methodology

The survey audience consists of 245 executive responses at a random selection of companies, with 25 percent based in the United Kingdom, 24 percent from France, 23 percent from Germany and the balance split evenly between the Netherlands and Belgium.

Each respondent has direct site-selection responsibilities, and the sample is heavily weighted toward the following titles: COO, Managing Director, Chairman/CEO/President, and CFO.

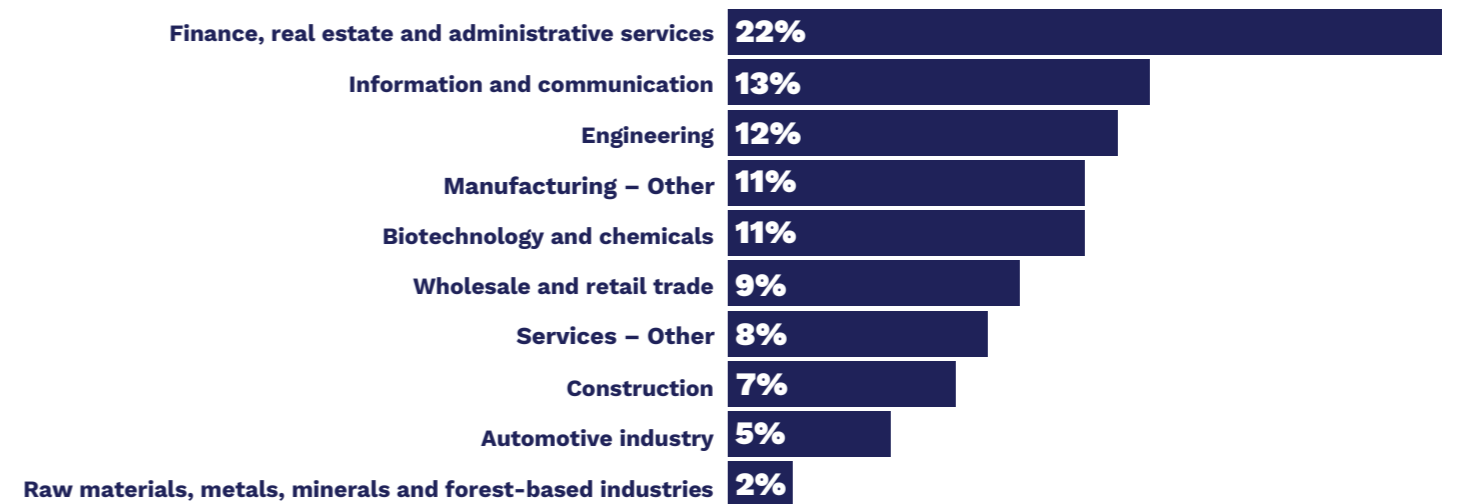


CHART 01: RESPONDENTS BY JOB TITLE



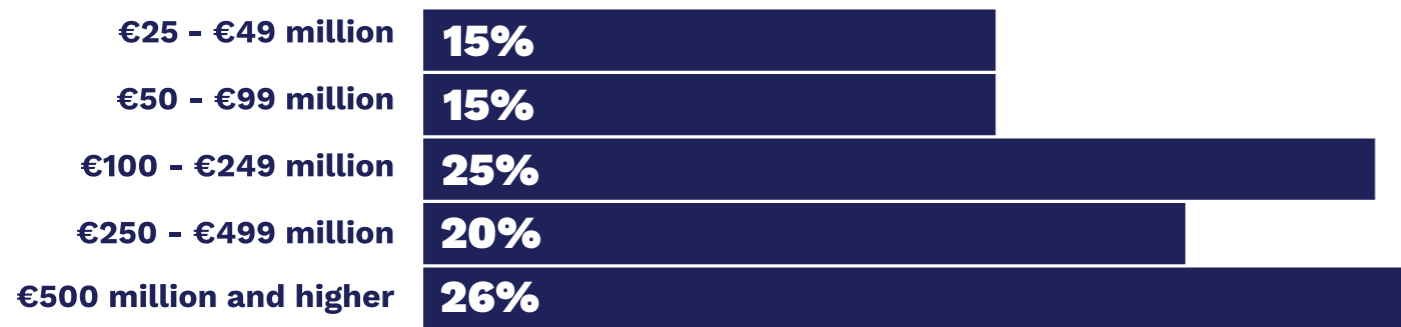
The executives surveyed represent a wide mix of sectors; finance and services, tech, engineering, and various manufacturing sectors.

CHART 02: RESPONDENTS BY INDUSTRY SECTOR



The survey — which includes multiple-choice, single select and open-ended questions — contains a series of classification questions to categorise responses by company size (revenue and number of employees) as well as into select demographic categories. The responses to open-ended questions were edited for completeness and coded into thematic groupings.

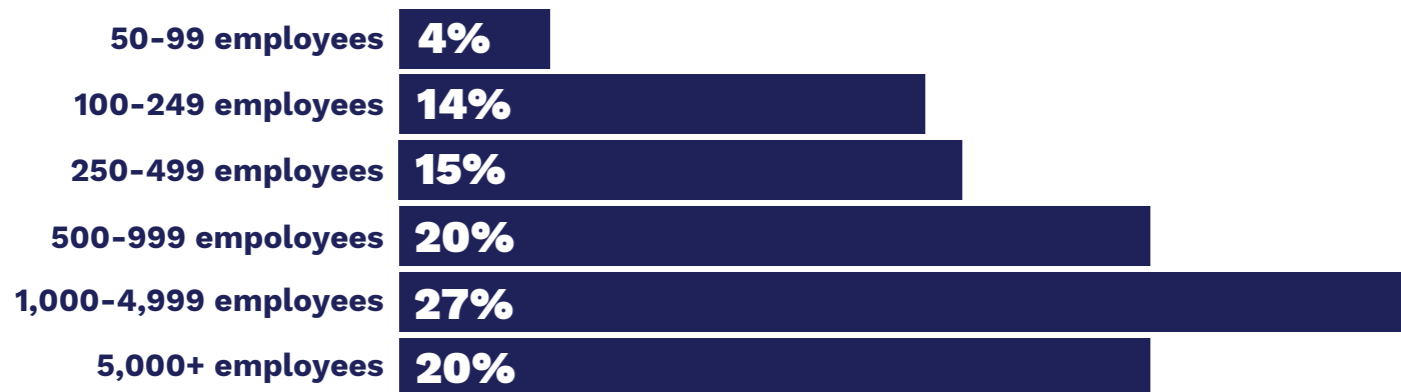
CHART 03: RESPONDENTS BY COMPANY REVENUE



The companies represented also vary greatly in size, ranging in annual revenue from €25 million to over €500 million and in number of employees from 50 to over 5,000.

The majority (72 percent) of executives surveyed are male, 27 percent are female, and 1 percent are non-binary.

CHART 04: RESPONDENTS BY NUMBER OF EMPLOYEES



Due to the cultural variation by country across Europe, and the different priorities and behaviours across various industries, the report contains data broken out by these classification categories.

It's important to note that this survey is a study of perceptions. A perception is an attitude, belief or impression and not necessarily a reflection of reality. Business executives have certain identifiable opinions and beliefs about doing business in Europe and throughout the world. Some of these perceptions might be accurate; some might be genuine misperceptions.



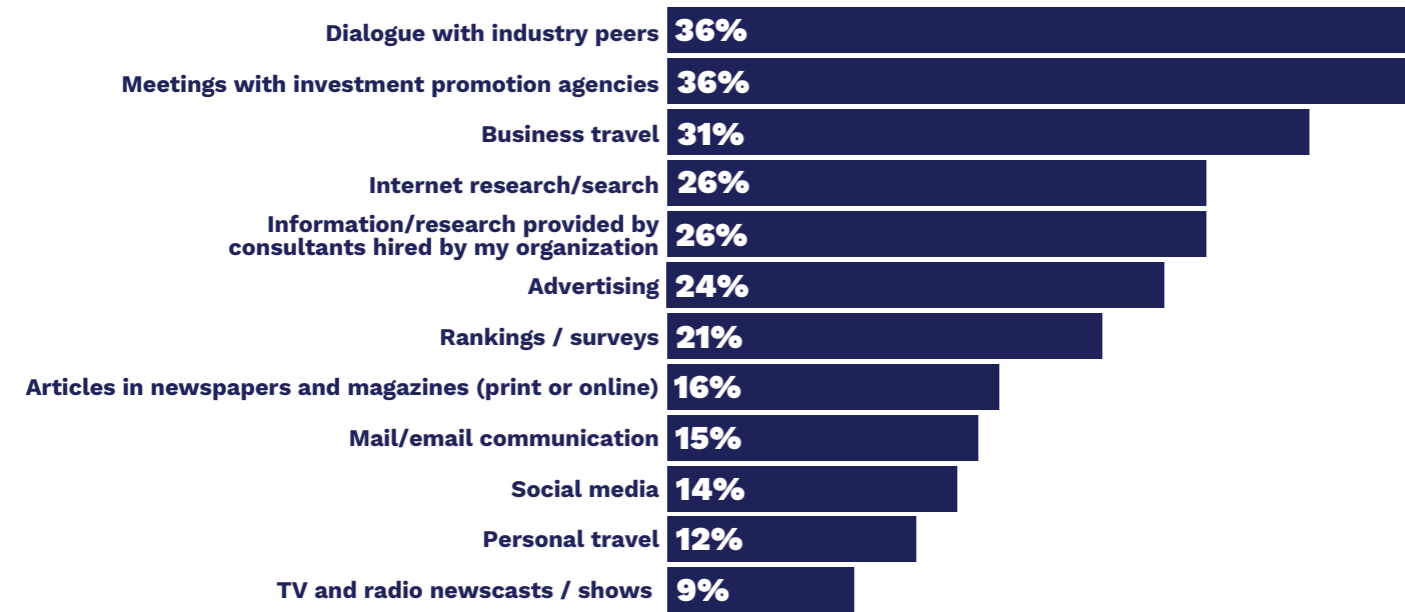
Influencing Executive Perceptions: Leading Sources of Information

How are perceptions of a location's business climate formed? More importantly, how can an IPA promote a favourable perception of its community among corporate decision-makers?

Although many factors influence awareness of a location for investment purposes, dialogue with industry peers was tied for first place as the most influential sources of information on an area's business climate, which has consistently been the top influencer in each Winning Strategies study of US executives since 1996 as well. Interestingly, however, meetings with investment promotion agencies were seen as an equally influential source of information. Business travel was the third most influential source of information.



CHART 05: LEADING SOURCES OF INFORMATION INFLUENCING EXECUTIVE PERCEPTIONS OF AN AREA'S BUSINESS CLIMATE



The findings illustrate that various channels of information and marketing hold important influence for European corporate executives, but relationship-based methods certainly lead the way. Interestingly, advertising is a leading source of information for almost a quarter of respondents.

Dialogue with industry peers is particularly influential among executives from Germany

and Belgium and less so among their French and British counterparts.

Germany and UK-based executives were the most likely to prefer meetings with investment promotion agencies for information on an area's business climate, as well as business travel.

TABLE 01: LEADING SOURCES OF INFORMATION INFLUENCING EXECUTIVE PERCEPTIONS OF AN AREA'S BUSINESS CLIMATE BY COUNTRY

SOURCES	BELGIUM	FRANCE	GERMANY	NETHERLANDS	UNITED KINGDOM
Meetings with investment promotion agencies	26%	29%	51%	20%	41%
Dialogue with industry peers	44%	29%	47%	40%	23%
Business travel	24%	26%	39%	31%	34%
Information/research provided by consultants hired by my organisation	18%	24%	26%	23%	33%
Internet research/search	26%	17%	25%	29%	33%
Advertising	29%	29%	14%	23%	26%
Rankings / surveys	9%	33%	18%	17%	23%
Articles in newspapers and magazines (print or online)	24%	19%	11%	17%	13%
Mail/email communication	15%	14%	19%	14%	11%
Social media	18%	12%	11%	14%	18%
Personal travel	15%	2%	16%	26%	10%
TV and radio newscasts / shows	12%	10%	9%	6%	10%

Difference in preferences can also be seen across the different industry sectors. For example, traditional advertising is most influential in industrial sectors such as automotive and construction (33 percent each). Meanwhile social media is more popular among information and communications (23 percent), and finance and services (21 percent), whereas none of the executives from the automotive, and wholesale and retail trades selected this as a leading source of information.

Business travel is particularly influential in advanced manufacturing industries

such as the automotive (58 percent), and biotechnology and chemicals sectors (41 percent), which often have large international exhibitions and conventions.

Of those that selected advertising as a leading source of information, 78 percent believe digital advertising or sponsored content is the most effective followed by television advertising in a distant second (14 percent).





Where Do Executives Get Their News?

There is no question that the ways in which decision-makers consume their news is often changing and to inform their marketing strategy, it is important for economic development organisations to know how and from where decision-makers consume their news. For respondents who selected articles in newspapers and magazines as influential sources of information, follow-up questions were asked to determine the specific media consumed in these categories.

European executives get their news from a wide variety of newspapers and media

outlets. The most popular, however, were the prominent British publications/outlets.

1. Financial Times
2. BBC
3. Economist

Other popular European media outlets are Le Monde and BFM in France; De TeleGraaf and NRC in the Netherlands and Die Welt in Germany. Bloomberg, CNN, the NY Times, the Telegraph, and the Times are also popular among European Executives.

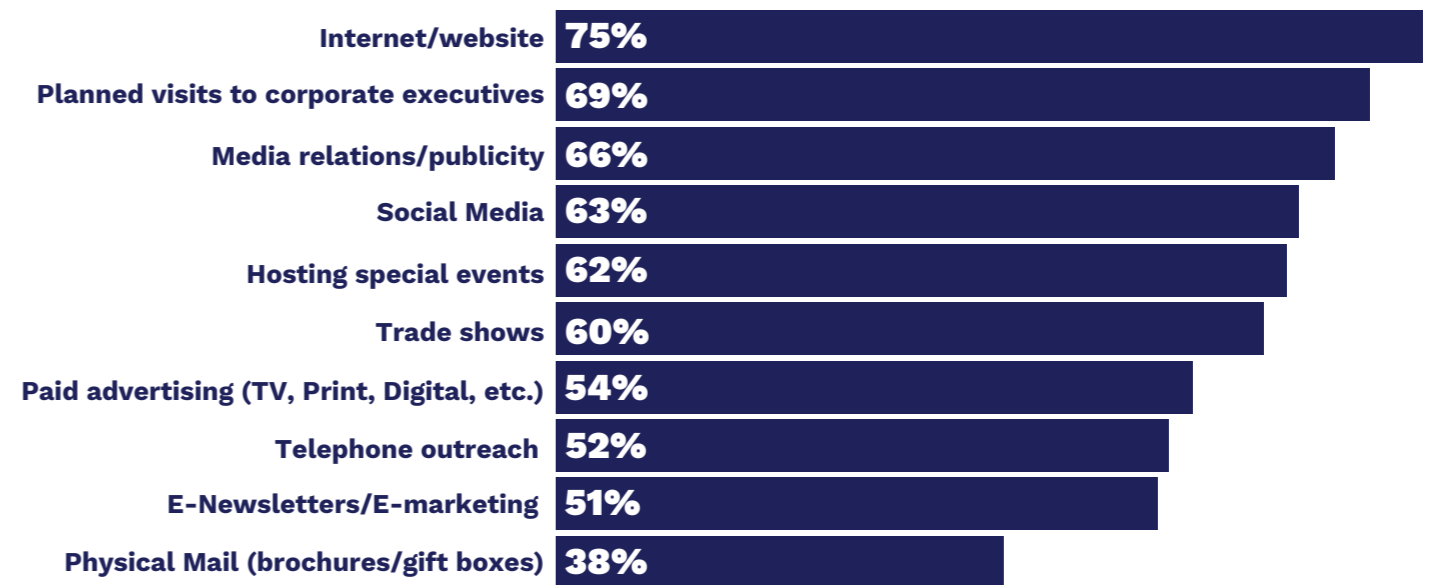


Best Marketing Techniques from the Customer's Perspective

Respondents were asked to gauge the effectiveness of 10 conventional marketing techniques used by economic development groups on a scale of 1 (not effective) to 5 (highly effective).

In line with findings from previous editions of Winning Strategies in the US, having a well-designed internet/website presence is paramount for IPAs, with three quarters of respondents rating it as effective or highly effective.

CHART 06: MOST-EFFECTIVE MARKETING TECHNIQUES (RATING 4 OR 5 ON A FIVE-POINT SCALE)



Also a consistent, planned visits to corporate executives are highly valuable, being rated as the second most effective marketing technique. However, only around half of respondents from the Netherlands saw in-person visits as effective, compared to at least two thirds of corporate executives from the remaining countries.

Media relations and publicity was seen

as the third most effective marketing technique overall, and the most effective among executives from Germany.

While more traditional means of communication such as telephone outreach and physical mail were seen as the least effective overall, executives of Belgian companies were more likely to give these marketing techniques a positive score.

TABLE 02: MOST EFFECTIVE MARKETING TECHNIQUES BY COUNTRY (% RATING 4 OR 5 ON A 5-POINT SCALE)

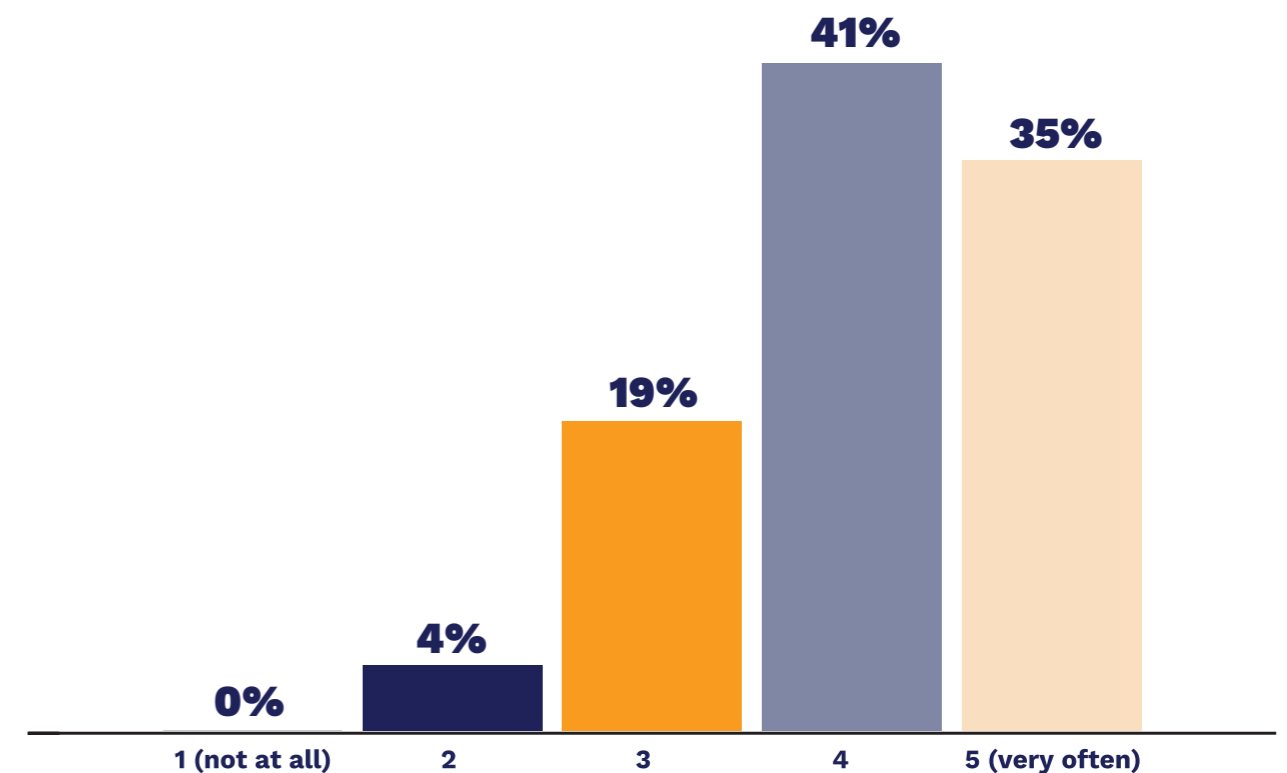
	BELGIUM	FRANCE	GERMANY	NETHERLANDS	UNITED KINGDOM
Internet/website	74%	79%	74%	63%	80%
Planned visits to corporate executives	74%	71%	67%	51%	75%
Media relations/publicity	65%	59%	79%	54%	67%
Social Media	65%	62%	65%	60%	64%
Hosting special events	76%	59%	60%	60%	61%
Trade shows	65%	62%	60%	63%	54%
Paid advertising (TV, Print, Digital, etc.)	38%	57%	53%	51%	64%
E-Newsletters/E-marketing	59%	57%	53%	34%	51%
Telephone outreach	56%	45%	53%	54%	54%
Physical Mail (brochures/gift boxes)	47%	38%	35%	34%	36%
Personal travel	15%	2%	16%	26%	10%
TV and radio newscasts / shows	12%	10%	9%	6%	10%



Looking further into the critical role of the internet and other digital platforms in place marketing, especially with the rise in remote working, there's no doubt about the importance of online tools in the location decision processes of companies. Respondents were asked to rate how

often they used the internet as a source of location information in their most recent location search. Around three in four respondents indicated they used the internet often or very often.

CHART 07: FREQUENCY OF INTERNET USE IN MOST-RECENT SITE-LOCATION SEARCH (1 = NOT AT ALL, 5 = VERY OFTEN)



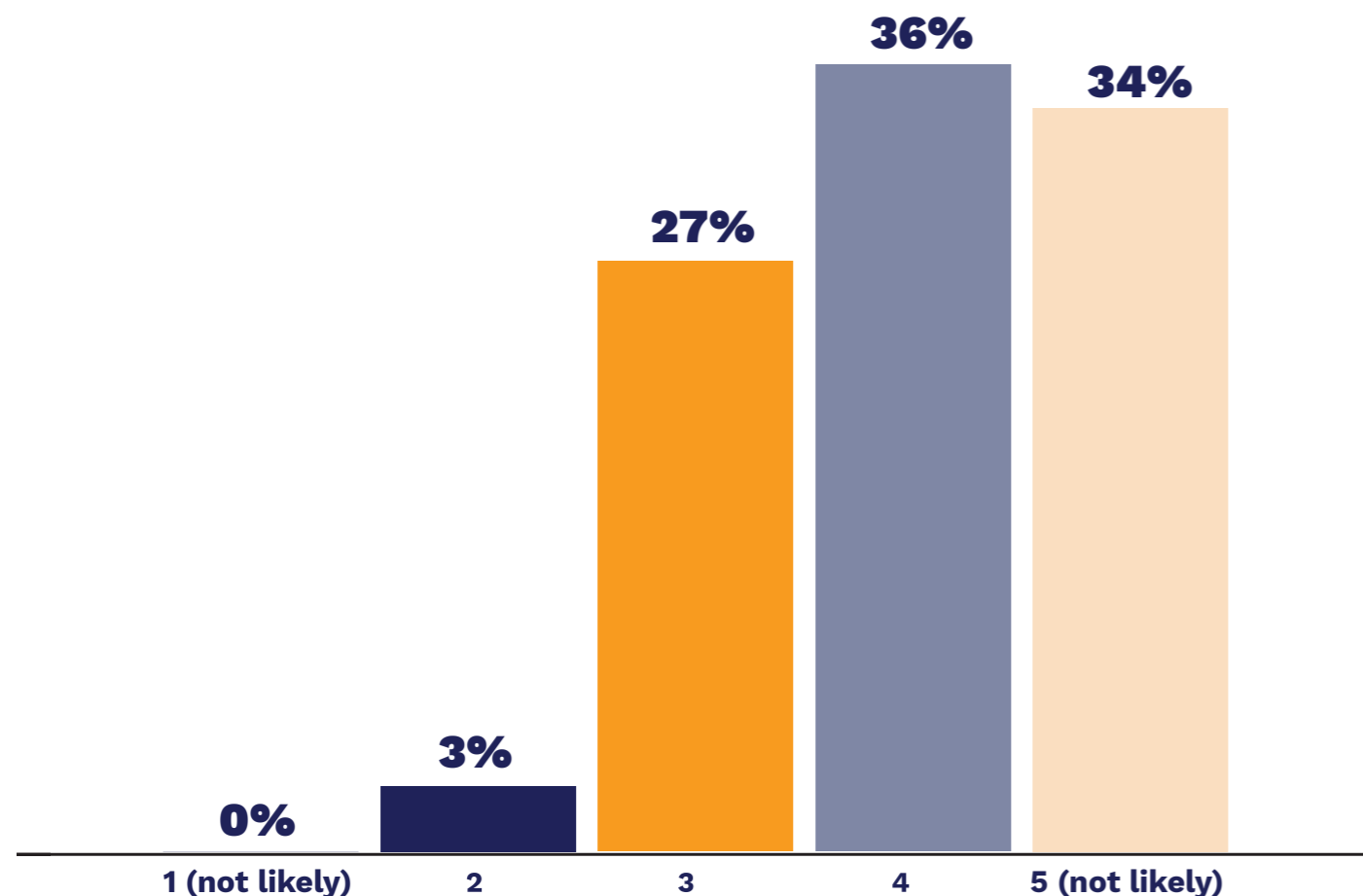
While the majority of corporate executives from each country reported using the internet often in their location decision process, respondents from UK-based companies reported the highest frequency of usage, with 84 percent recording a score of 4 or 5. While respondents from the Netherlands reported the lowest levels of internet usage, the majority (69 percent) still gave a score of 4 and above.

Respondents from the wholesale and retail trade and construction industry reported the highest levels of internet use in their most recent site location search, with 95 percent and 94 percent giving a score of 4 or 5 respectively. The manufacturing

– other (68 percent) and biotechnology and chemicals (70 percent) industry classifications recorded the lowest levels of internet use.

With the central role of the internet in corporate location decision making, having a well-designed website with easily accessible information is essential for cities, regions and countries to attract corporate investment. When asked about the likelihood of visiting an investment promotion agency’s website during their next site-location search, 70 percent of respondents indicated they would be “likely” or “very likely” to do so.

CHART 08: LIKELIHOOD OF VISITING INVESTMENT PROMOTION AGENCY WEBSITES DURING NEXT SITE SEARCH (1 = NOT LIKELY, 5 = EXTREMELY LIKELY)



Corporate executives from the UK and Germany are most likely to visit an investment promotion agency’s website, with 75 percent of respondents from each country reporting scores of 4 and above. France followed closely at 71 percent, while the Netherlands (63 percent) and Belgium-based (56 percent) executives were least likely.

The industries most likely to visit investment promotion agency websites during their next site search include wholesale and retail trade (81 percent), biotechnology and chemicals (78 percent) and automotive (75 percent). The least likely are construction (50 percent) and raw materials, metals, minerals and forest-based industries (50 percent).

As the reliance on digital tools – and specifically websites – increases among corporate executives and location advisors, the next logical question is what information they find most helpful.

Respondents were able to select up to five of the 15 offered features most typically included in investment promotion websites.

Tax and incentive information (51 percent) ranked as the most-useful feature, followed by demographic information (42 percent). Demographic information is seen as particularly useful by corporate executives based in Germany (58 percent), and less so in the Low Countries of Belgium and the Netherlands (both 29 percent).

Meanwhile, a searchable database of available buildings and sites, which ranks third overall (40 percent), is particularly important for companies in Belgium (56 percent) and the Netherlands (54 percent).

Notably, UK-based companies are more likely than their continental counterparts to seek quality of life information (34 percent) and immigration/work visa procedures (34 percent) on IPA websites.

CHART 09: MOST-USEFUL FEATURES OF AN INVESTMENT PROMOTION AGENCY'S WEBSITE

		FR	UK	DE	BE	NL
Tax & incentive information	51%	50%	51%	58%	47%	46%
Demographic information	42%	47%	38%	58%	29%	29%
Searchable database of available buildings and sites	40%	28%	36%	37%	56%	54%
Comparisons to competitor locations	38%	50%	43%	28%	32%	29%
Maps of the region/country	26%	12%	31%	19%	32%	46%
Quality of life information	23%	19%	34%	23%	24%	11%
Immigration/work visa procedures	23%	17%	34%	26%	18%	11%
Major employer list	22%	21%	26%	21%	24%	17%
Key sectors and related information	19%	21%	18%	16%	21%	23%
Workforce statistics	18%	16%	15%	19%	24%	17%
Testimonials from local employers	17%	9%	16%	30%	15%	14%



First Contact: When and How Decision-Makers Approach Investment Promotion Organisations



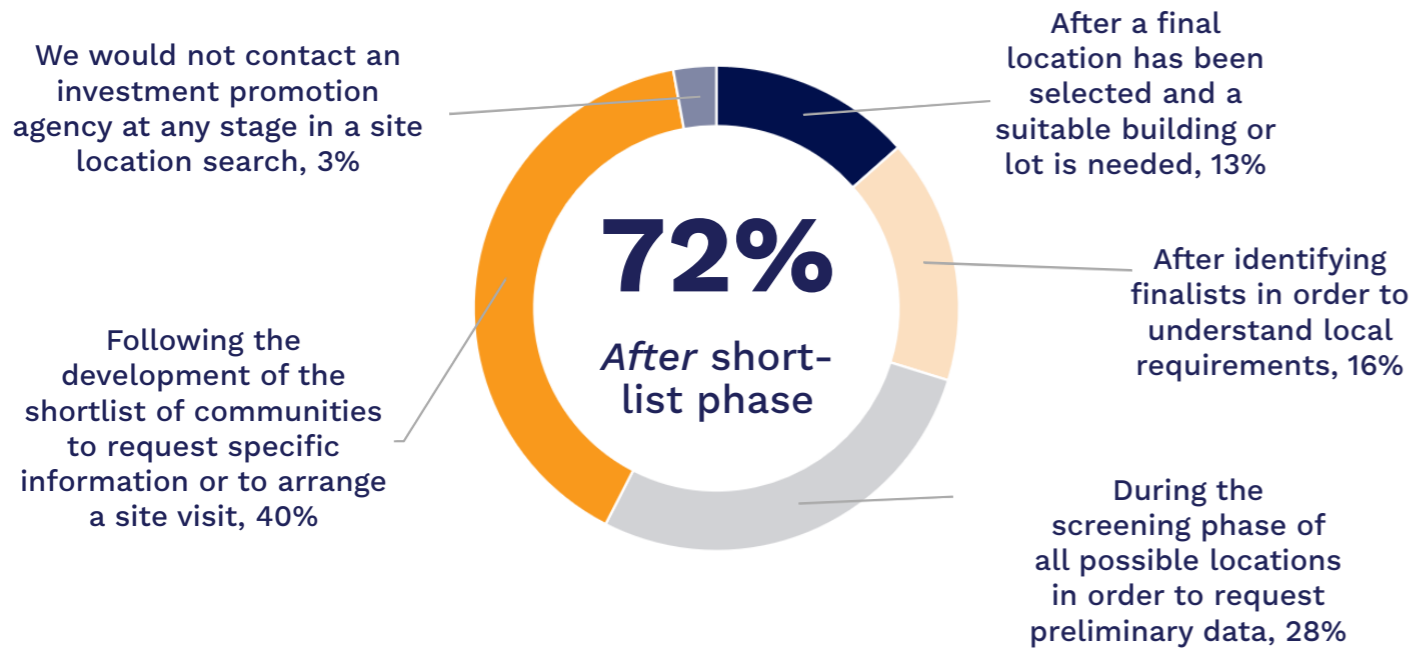
Quality of life information is also more likely to be important for major office-based industry classifications such as information and communication (35 percent) and finance, real estate and administrative services (31 percent) than for traditional industrial sectors such as automotive (8 percent), construction (17 percent) and engineering (14 percent).

Another notable difference by industry, a list of major employers in an area (50 percent) is seen by automotive executives as the joint-most useful feature on an IPA website, more than twice the average across all other industries.

European decision-makers contact IPAs across all of the different stages of a location decision, although the timing favours later in the process versus earlier. As seen in Chart 10, the highest percentage of respondents report reaching out *following the development of a short list of communities to request specific information or to arrange site visits*, with 40 percent of respondents selecting this option.

Importantly, however, is that only 28 percent of respondents will reach out earlier in the process to request additional data to help inform their decision in the initial screening phase of the project. Combined with the heavy reliance on digital research from earlier, it appears that the location decision process falls in line with other major B2B purchasing decisions within companies where initial research is conducted behind the scenes before directly contacting a narrower list of potential choices.

CHART 10: FIRST CONTACT WITH INVESTMENT PROMOTION AGENCIES



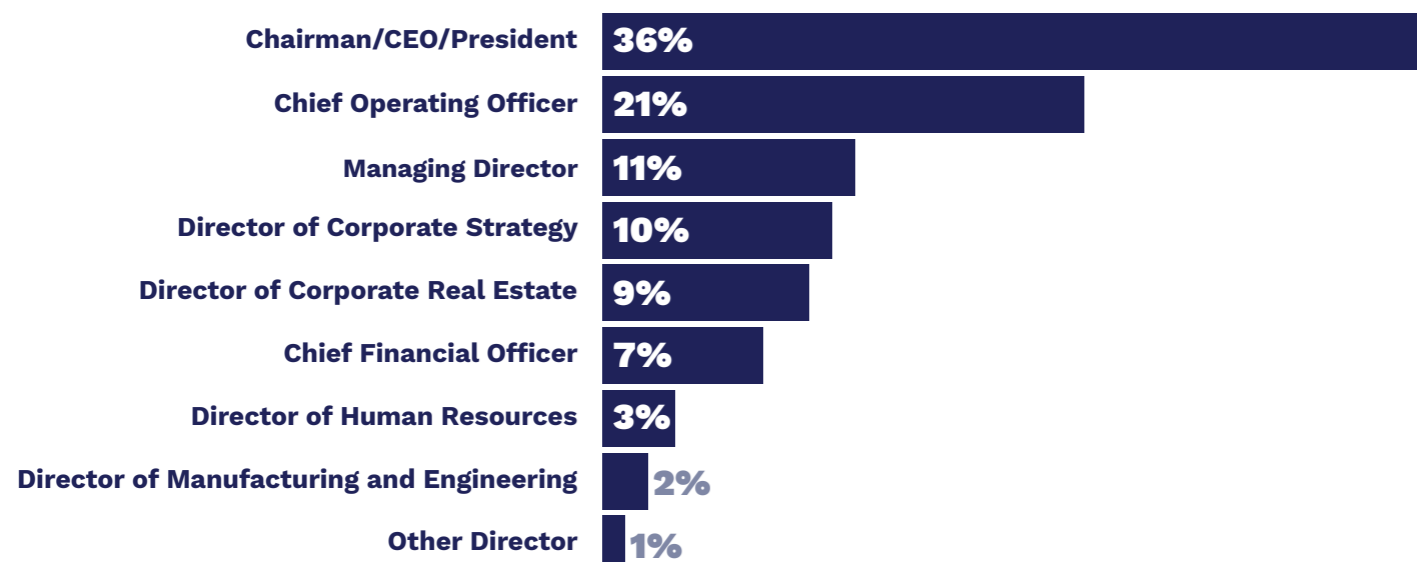
Only 3 percent of respondents report they would not contact an investment promotion agency at any stage of a location decision.

Thinking about the decision maker most likely to lead corporate location projects, a list of nine executive titles was provided. Respondents reported that top executives - Chairman/CEO/President (36 percent) followed by Chief Operating Officer

(21 percent)—were most likely to lead a location decision.

This deviates from traditional U.S.-based results which found that after the Chairman/CEO/President, Chief Financial Officers were most likely to lead location decisions.

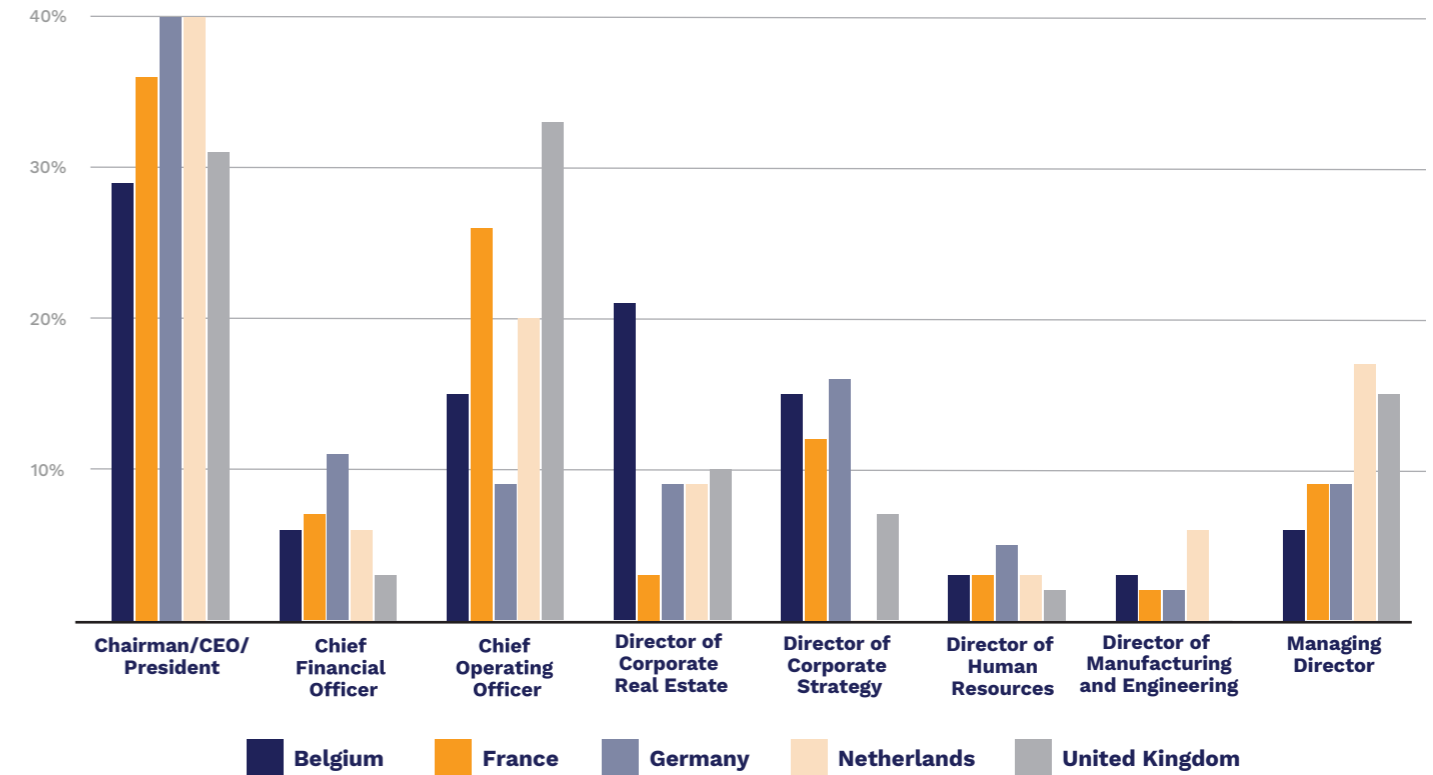
CHART 11: EXECUTIVES MOST LIKELY TO LEAD LOCATION DECISIONS



While, overall, it is most common for the Chairman/CEO/President to be the primary decision maker there is some variation between the different countries. In the United Kingdom, the Chief Operating Officer is more likely to lead the process. In Belgium, it is more likely that the Director of

Corporate Real Estate will lead the location decision process compared to other countries. Of course, in reality, answers will vary within individual companies based on size and industry, so that should be taken into consideration.

CHART 12: EXECUTIVES MOST LIKELY TO LEAD LOCATION DECISIONS BY COUNTRY





Corporate Executives and Their Use of Social Media



Over time, the use of social media for business purposes has become increasingly mainstream. In comparison to their U.S. counterparts, European executives use different platforms and at different rates, but among both world regions, LinkedIn is the top platform used by executives. Among European executives, Instagram (55 percent) is the second most frequently used, followed by Facebook (51 percent).

CHART 13: USE OF SOCIAL MEDIA PLATFORMS FOR BUSINESS PURPOSES

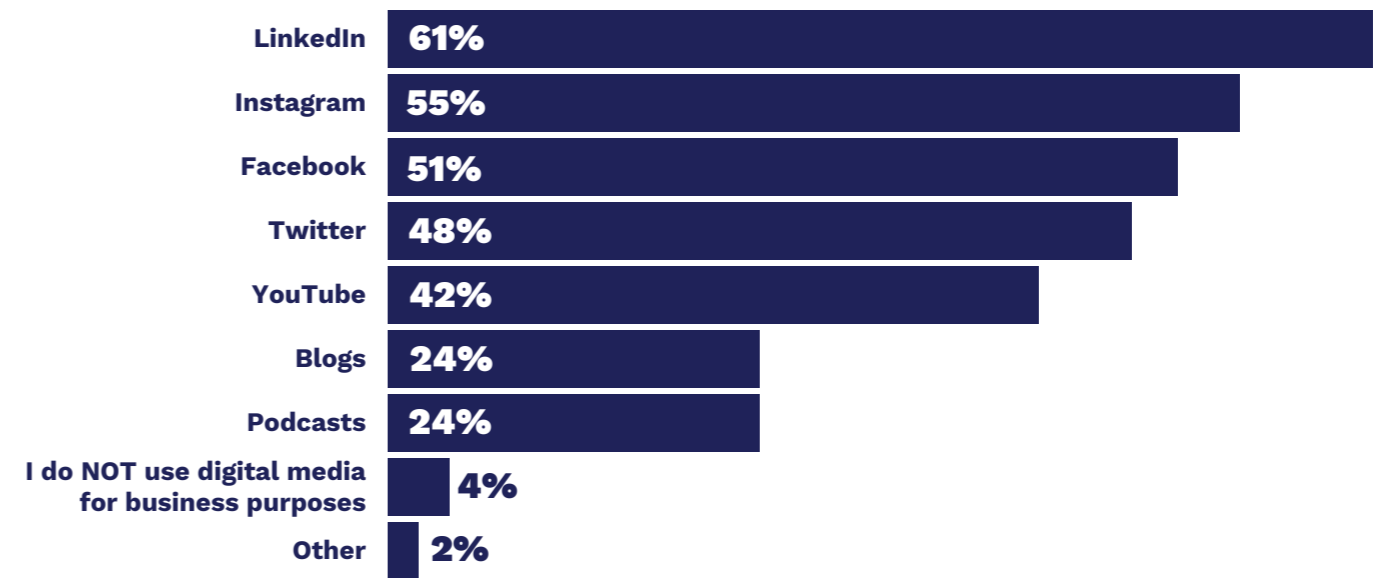
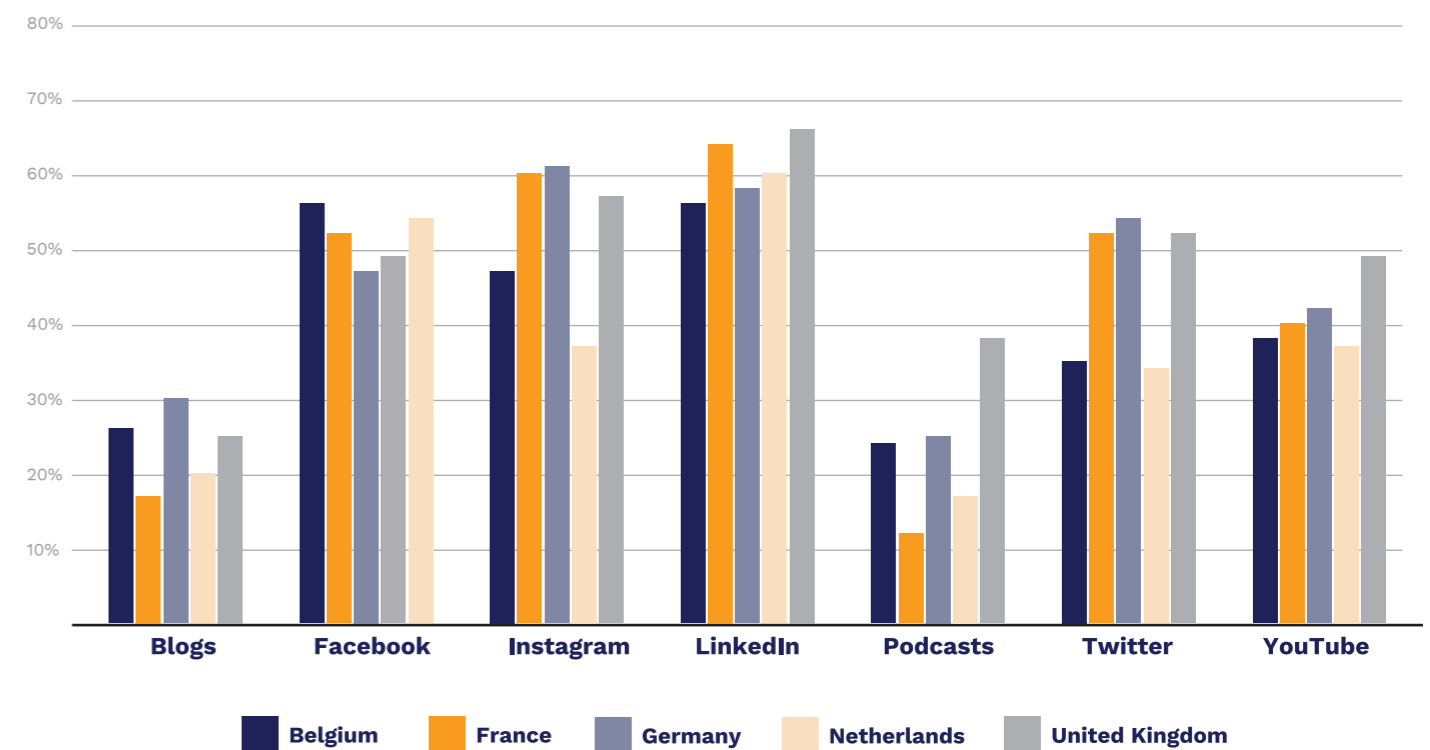


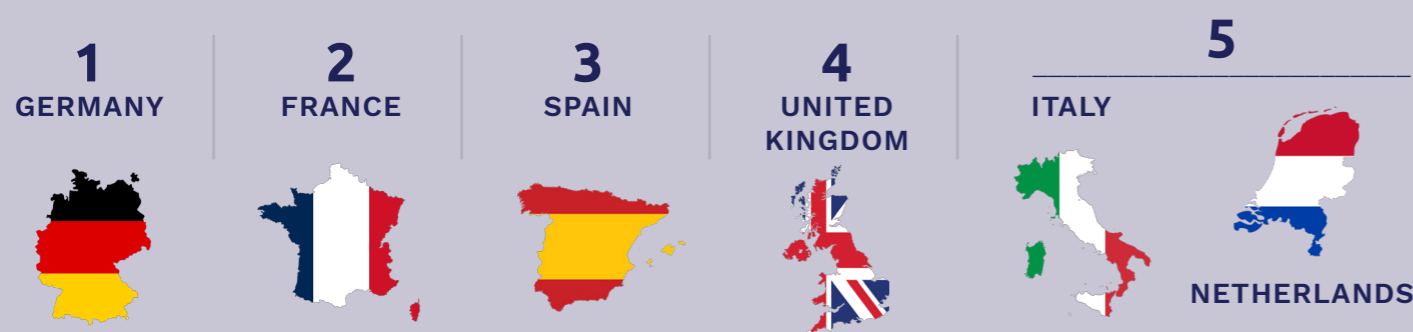
CHART 14: USE OF SOCIAL MEDIA PLATFORMS FOR BUSINESS PURPOSES BY COUNTRY



Best Places for Business

Given current global economic, political and social conditions, the perception of locations for new facilities or company expansions is of topmost interest to IPAs and investors alike. Identifying the IPAs that are considered “best in class” is an equally interesting data point as an indicator of those agencies that are top of mind in terms of providing great customer service and support to investors evaluating locations for new or expanded facilities.

Best Business Climates



As part of this question, we asked respondents to provide their feedback on the best countries for business through an open-ended question. The top business-related assets in Germany - as reported by executives selecting it as having the best business climate - are the overall economic strength/country conditions; a high-quality workforce and a stable and peaceful political climate. France was also cited as being centrally located with good accessibility in addition to a stable and strong economy. Spain’s workforce and strong economy are recognised strengths of the country.

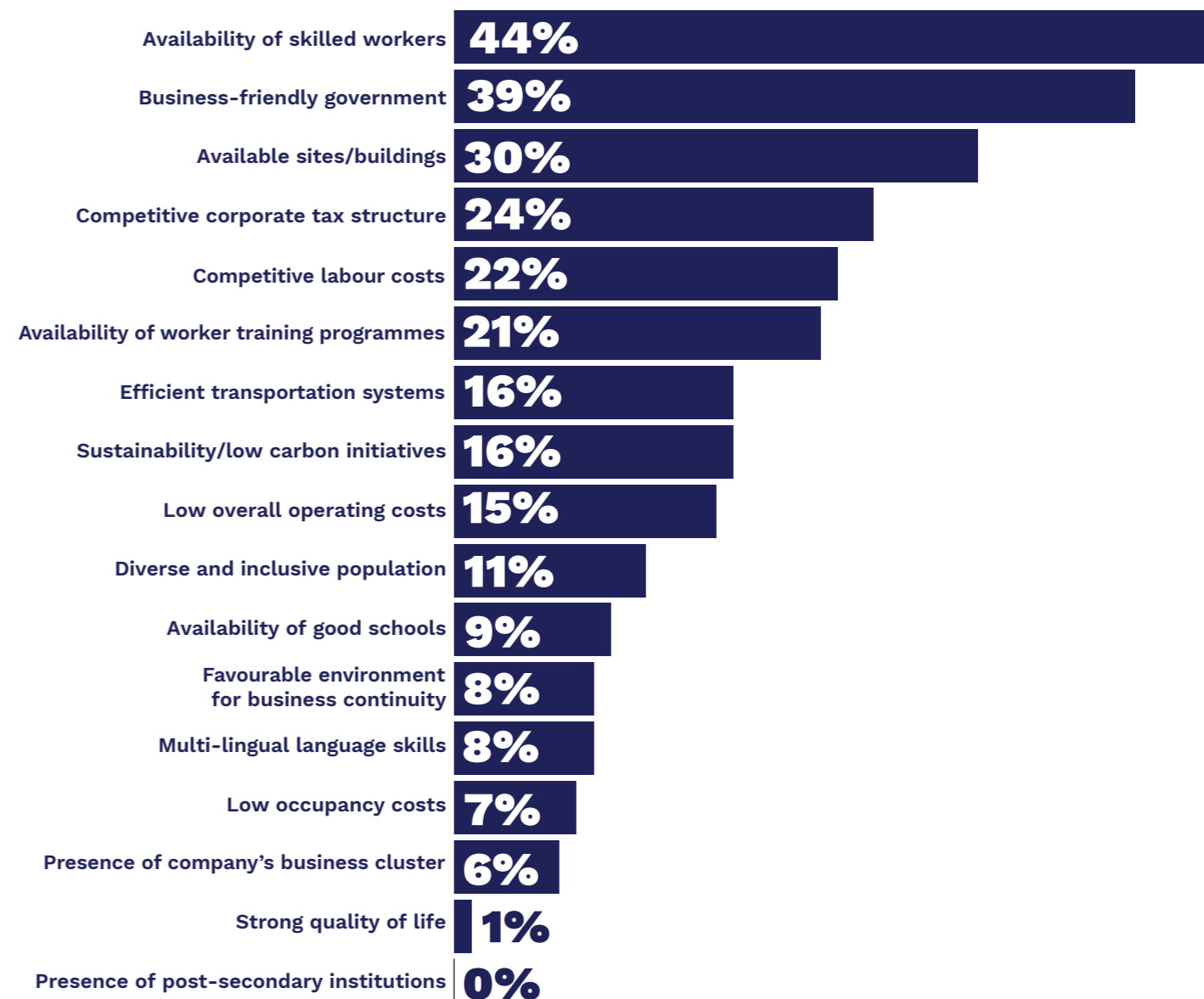
Why is there so much overlap? Different industries and different company sizes

All respondents were asked to provide up to three countries that they perceive to have the most-favourable business climates. In response, executives identified Germany (43 percent) as No. 1, followed by France (42 percent), Spain (23 percent), the United Kingdom (18 percent) and both Italy and the Netherlands tied for fifth place (17 percent).

have varying priorities, thus the possibility of polarised opinions on everything from talent to taxation to government efficiency. An exact reason would require more analysis, but we did seek to collect consensus on how companies judge a business location.

When asked to identify the factors of most importance when evaluating an area’s business climate, the factors rising to the top in terms of importance include the availability of skilled workers (44 percent); a business-friendly government (39 percent) and available sites and buildings (30 percent).

CHART 15: FACTORS OF MOST IMPORTANCE DURING THE SITE SELECTION PROCESS



Other factors are deemed less important during the location decision process. These include the presence of post-secondary institutions and a strong quality of life. It’s important to note that all of these factors retain value in a site location process on some level, but this survey was trying to capture the priorities by forcing respondents to select only three.

There are differences in the weight placed on these factors based on the location of the respondent. Notably, executives in the Netherlands place a greater weight on efficient transportation systems, an inclusive and diverse population and low

occupancy costs. German executives place a greater emphasis on sustainability/low carbon initiatives and among all the countries, French executives place the greatest weight on overall operating costs.

TABLE 03: FACTORS OF MOST IMPORTANCE DURING THE SITE SELECTION PROCESS BY COUNTRY

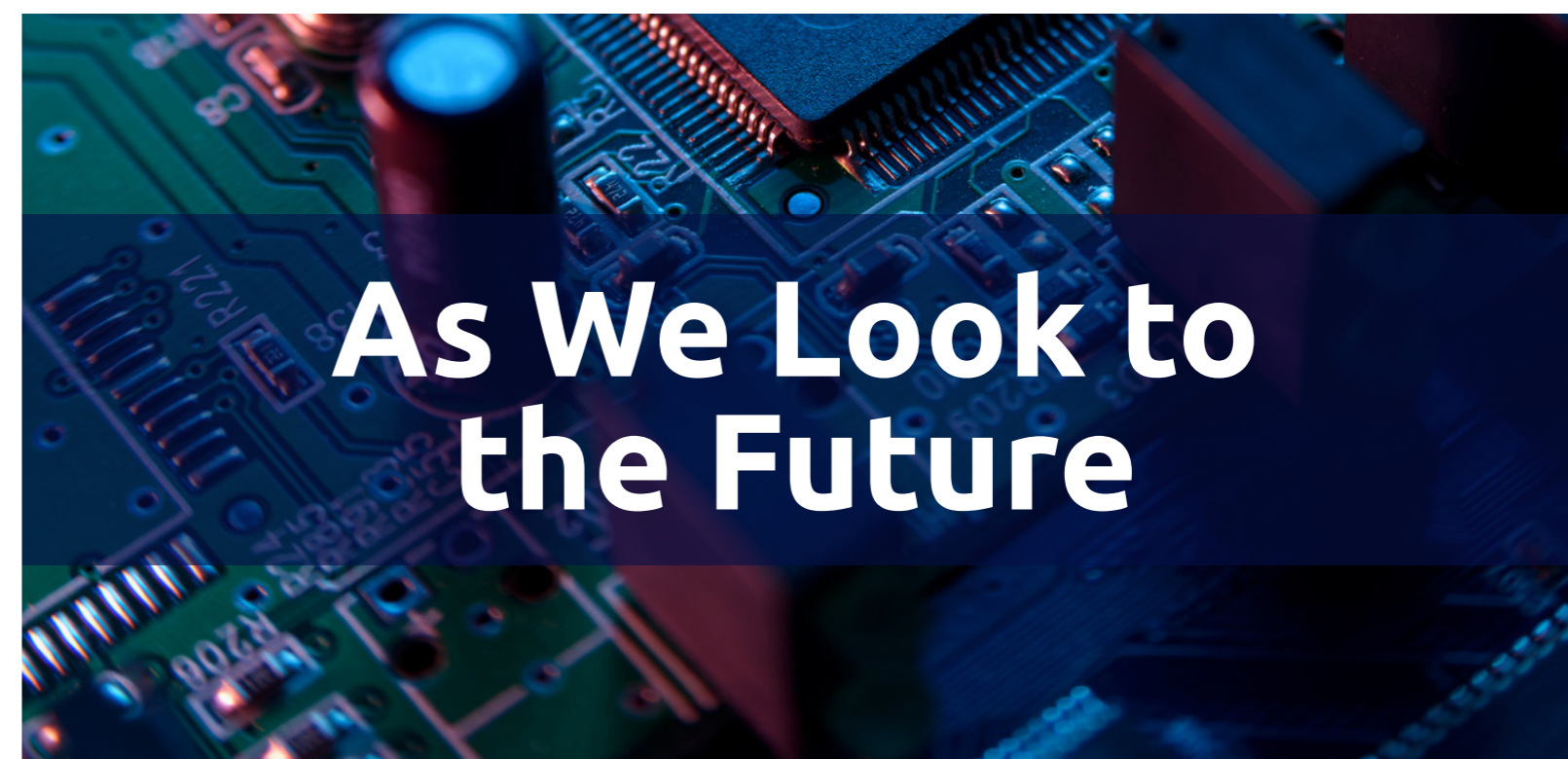
	BELGIUM	FRANCE	GERMANY	NETHERLANDS	UNITED KINGDOM
Availability of skilled workers	47%	40%	54%	31%	43%
Business-friendly government	32%	38%	42%	31%	44%
Available sites/buildings	26%	28%	30%	29%	36%
Competitive corporate tax structure	26%	26%	23%	14%	30%
Competitive labour costs	21%	24%	23%	14%	25%
Availability of worker training programmes	21%	22%	19%	20%	23%
Efficient transportation systems (highway, air, rail, port)	18%	10%	12%	29%	16%
Multi-lingual language skills	18%	5%	9%	6%	5%
Presence of company's business cluster	12%	5%	4%	9%	5%
Sustainability/low carbon initiatives	9%	14%	23%	9%	18%
Favourable environment for business continuity (in light of natural or manmade disruptions)	9%	9%	7%	9%	8%
Diverse and inclusive population	6%	9%	5%	23%	15%
Availability of good schools	6%	7%	7%	14%	13%
Low occupancy costs	6%	7%	4%	11%	8%
Low overall operating costs	3%	24%	19%	20%	5%
Strong quality of life	0%	0%	2%	3%	2%
Presence of post-secondary institutions	0%	2%	0%	0%	0%

Cities with the Best Business Climate

Keeping those business factors in mind, we also asked executives to provide up to three European cities that are perceived to have the best business climates. Five cities rose to the top.

1. Paris (29%)
2. Berlin (19%)
3. London (16%)
4. Brussels (14%)
5. Amsterdam (10%)

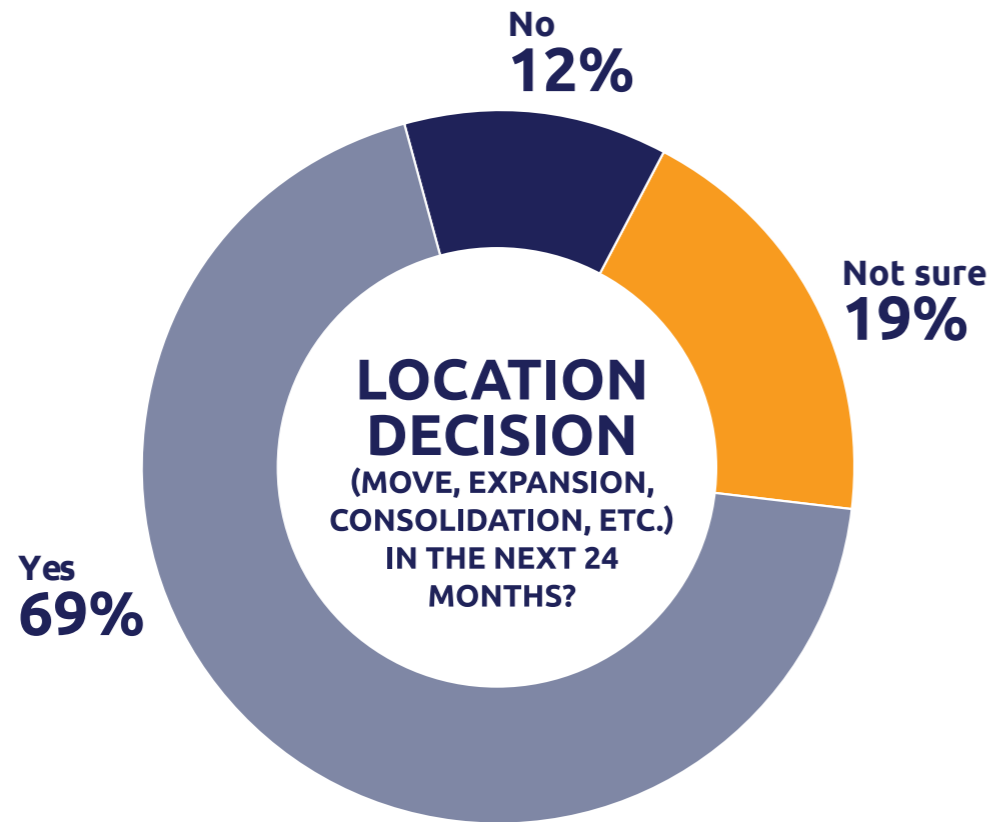
In the open-ended responses, commonalities among these cities include their central locations and accessibility – not only within the region, but globally also – the overall business climate, access to talent and the perception that they are European economic “hubs”.



With issues ranging from talent shortages, the pandemic, political and economic instability dominating the news cycle, C Studios would be remiss in not querying respondents on their outlook on investment decisions to come. In looking ahead, these results show that corporate executives are optimistic about investment plans during the next two years, with 69 percent reporting that their company will make a location decision (such as move,

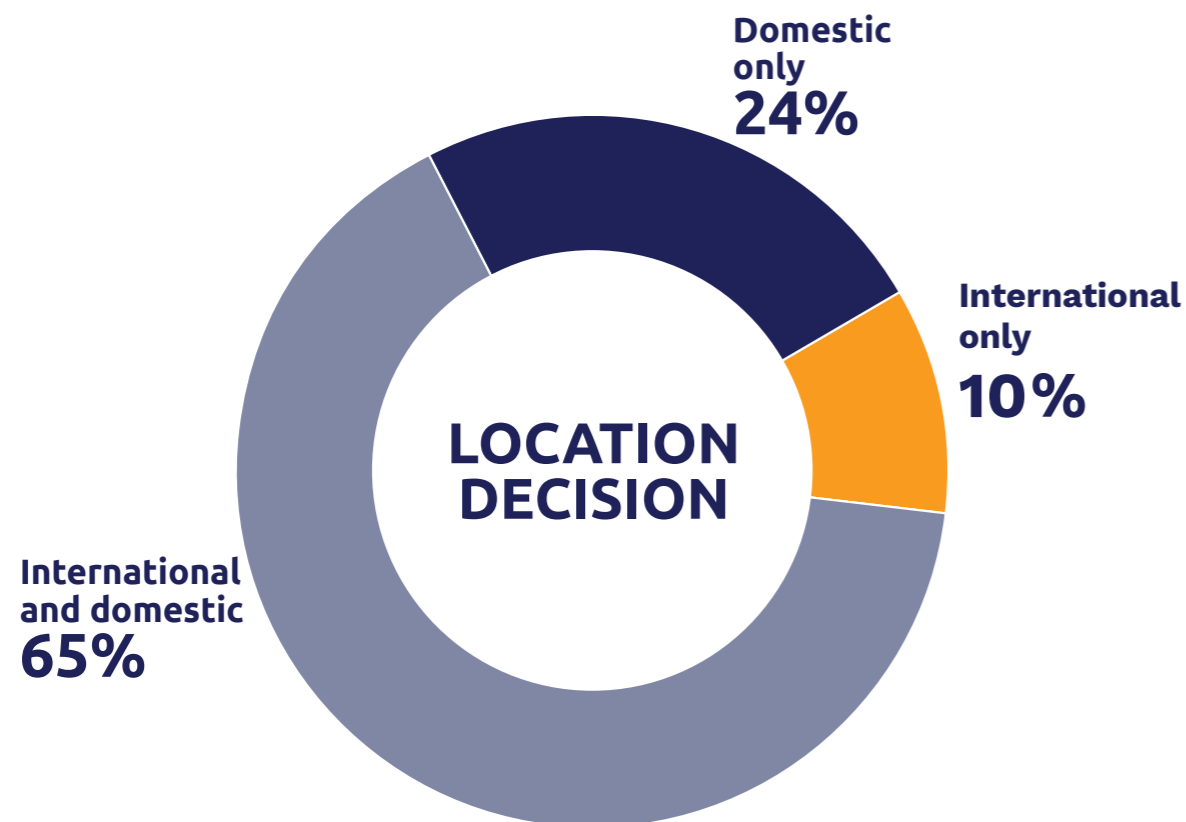
expand or consolidate) during the next 24 months, 19 percent report that they are not sure if their company will make a location decision during the next 24 months and 12 percent reported that their company would make no location decision during the next 24 months.

CHART 16: PROJECTED LOCATION DECISION DURING THE NEXT 24 MONTHS



Thinking about investment decisions, most respondents will consider both domestic and international locations in their site search.

CHART 17: AREAS CONSIDERED IN LOCATION DECISIONS



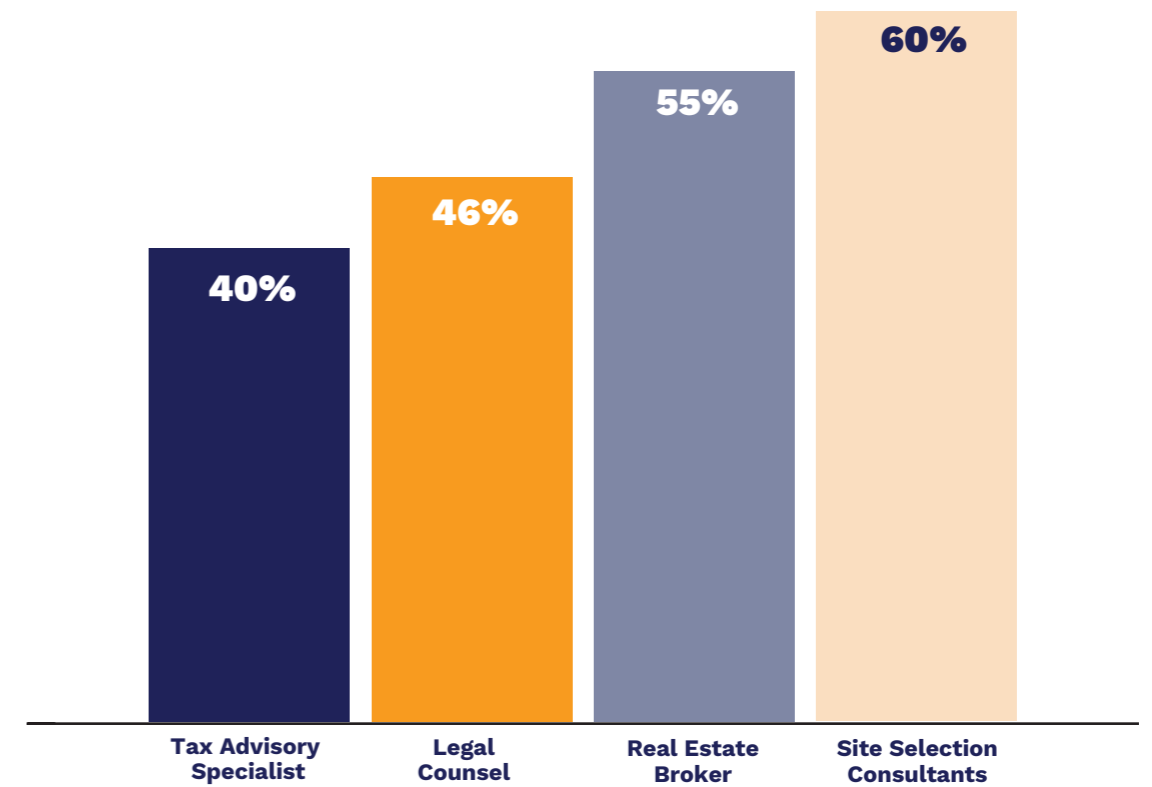
To understand the site selection process further, we asked corporate executives if they anticipate outsourcing a portion of the site selection process during their next location search. The results show that 88 percent answered “yes,” they would outsource some or all of the site-selection process.

CHART 18: PLANS TO OUTSOURCE A PORTION OF THE SITE-SELECTION PROCESS



Chart 19 shows the individual/organisations that are most likely to assist with domestic or international location site-selection searches. In site searches, executives are most likely to use site selection consultants (60 percent) followed by real estate brokers (55 percent).

CHART 19: PROFESSIONAL LIKELY TO ASSIST WITH SITE-LOCATION SEARCH



In the rough seas of today’s quickly changing environment, it’s wise to pause, pop one’s head out of the water and orient for the destination ahead. This study aims to be the lighthouse in the distance, providing direction to investment promotion agencies and other institutions responsible for economic development around how executives in Europe develop their perceptions, prioritise location decisions and utilise the vast array of information available to them.



A Word About C Studios

C Studios delivers digital marketing solutions for economic development organisations across investment promotion, trade promotion and talent attraction. With expertise from working with hundreds of cities, regions and countries, we guide our clients through their demand and lead generation challenges with confidence and clarity. Rooted in extensive industry research and decades of experience in promoting locations, C Studios' tailored programmes facilitate growth for expanding companies, scaling enterprises and transitioning professionals.

C Studios is a joint venture between two best-in-class agencies: New York-based DCI and Belfast-based OCO Global. Together, we combine more than 80 years of agency history and 250 experts from around the world.

More About DCI

Development Counsellors International (DCI) is the leader in marketing places. Since 1960, the agency has worked with more than 450 cities, regions, states and countries, helping them attract both investors and visitors. DCI specialises exclusively in all phases of economic development, tourism and talent marketing. www.aboutdci.com

More About OCO Global

OCO Global is a technology enabled advisory firm focused on trade, investment and economic development. It works with clients to ensure that their international business thrives, by delivering innovative and sustainable outcomes and connecting them to opportunities across the world that create prosperity, employment and economic growth. www.ocoglobal.com

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