Forces of Attraction

Foreign Direct Investors are getting back on track

A presentation for: **Media Research Group Conference** | Date: **17/11/2021**

Phil Robinson, EMEA Head of Data Science & Insights, Bloomberg Media
Simon McDonald, Senior Client Consultant, DVJ Insights



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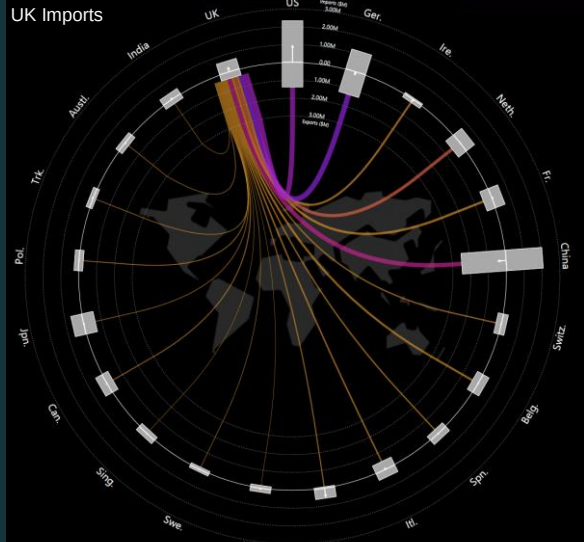
Background.

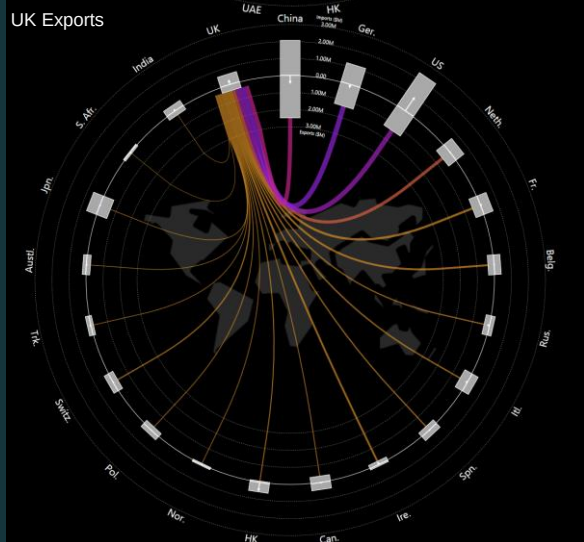
Bloomberg Media have developed media partnerships with government bodies and agencies all over the world.

To strengthen our relationship with governments we developed a global research study to understand the attitudes, mindsets and plans **of senior business directors who are responsible for the international investment strategy of their organisation.**

The study began in November 2019 when the world seemed relatively normal, shortly followed by a recontact study in 2020 to assess the impact of the pandemic on investment plans, and resulting in our most recent 2021 study exactly 12 months on.

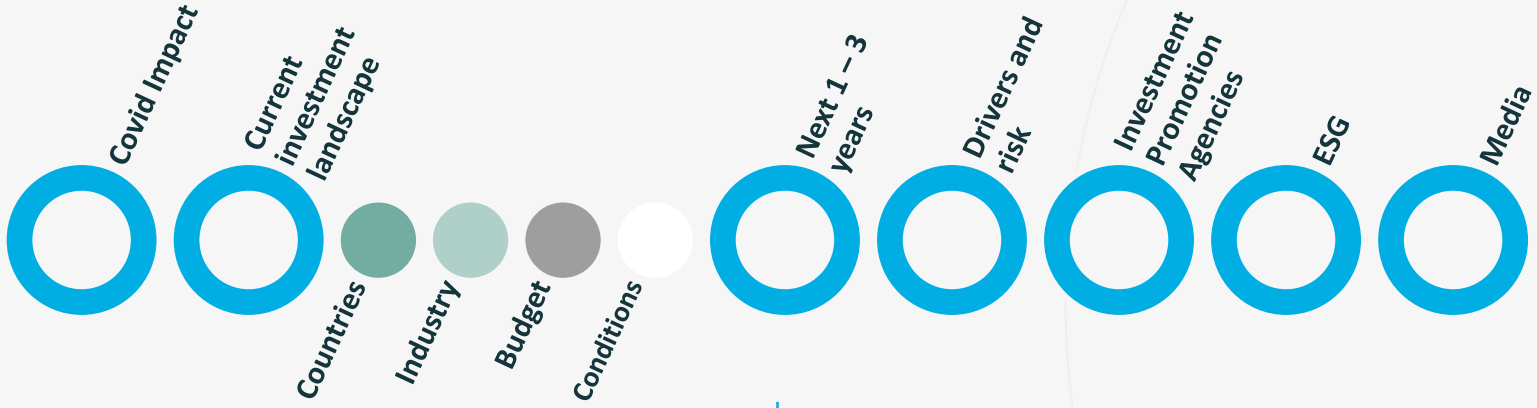
This presentation focusses on the third wave of our “Forces of Attraction” global research study conducted among **3,060 foreign direct investors in 15 countries spanning 4 regions**. This years study was expanded to include Mexico, Brazil, Argentina to cover LATAM in response to the growing demand from governments bodies.





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Data sets allows us to analyse a vast range of topics.





Bloomberg Users vs. Non-Bloomberg Users

High Quality Investors* vs. Investors

Industries

Developed vs. Developing Markets

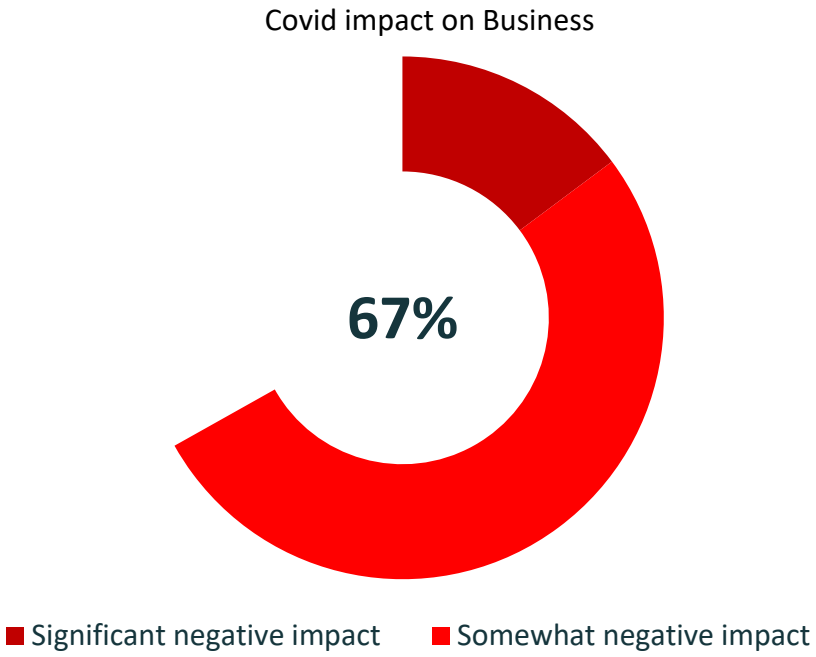
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Impact of Covid.



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All markets have been negatively impacted by Covid at a macro level.



Argentina most negatively effected 71%

United States least negatively effected 54%

dvj insights Q. What impact would you say the COVID-19 pandemic has had on your business so far?:

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Covid has negatively impacted business, but also created opportunities.

Companies have had to be agile to adapt to new government regulation, working practices and business opportunities.

Transition to working from home was difficult

42%

Introduced more flexible working patterns

43%

dvj insights Q. Has your company experienced any of the negative changes mentioned below in the past year?
Q. Has your company experienced any of the positive changes mentioned below in the past year?
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FDI Confidence Barometer.

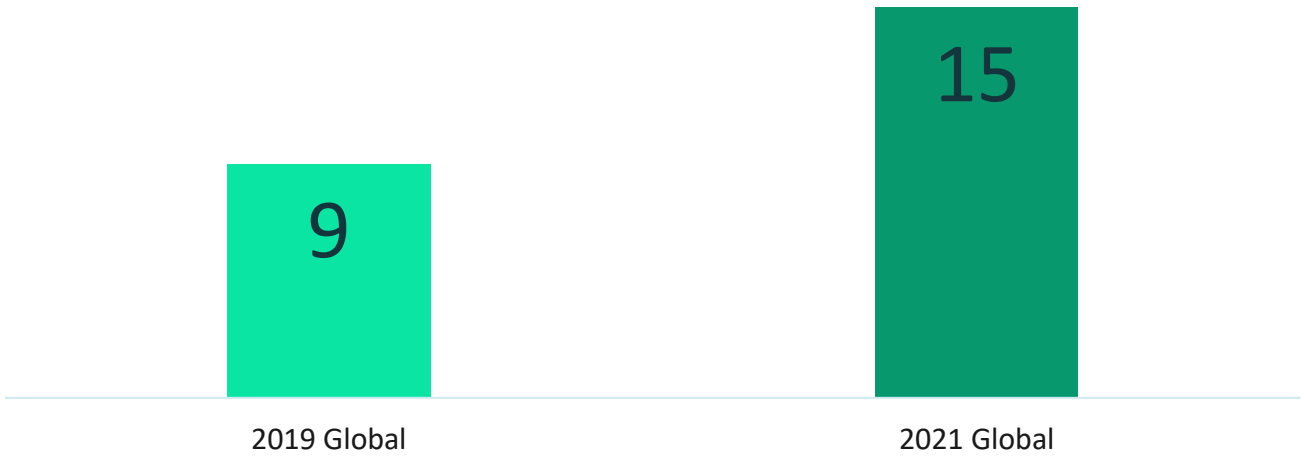


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FDI Confidence Barometer signals enthusiasm among investors.

This increase in confidence is led by the new markets surveyed – mainly Latin countries. Net optimism is at the same level as 2019 in the same 10 countries.

FDI Confidence Barometer (optimism – pessimism)



dvj insights Q. Overall, are you more or less optimistic about the global economy then you were last year?

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FDI Confidence Barometer signals enthusiasm among investors.

This increase in confidence is led by the new markets surveyed – mainly Latin countries. Net optimism is at the same level as 2019 in the same 10 countries.

Which country was most optimistic?



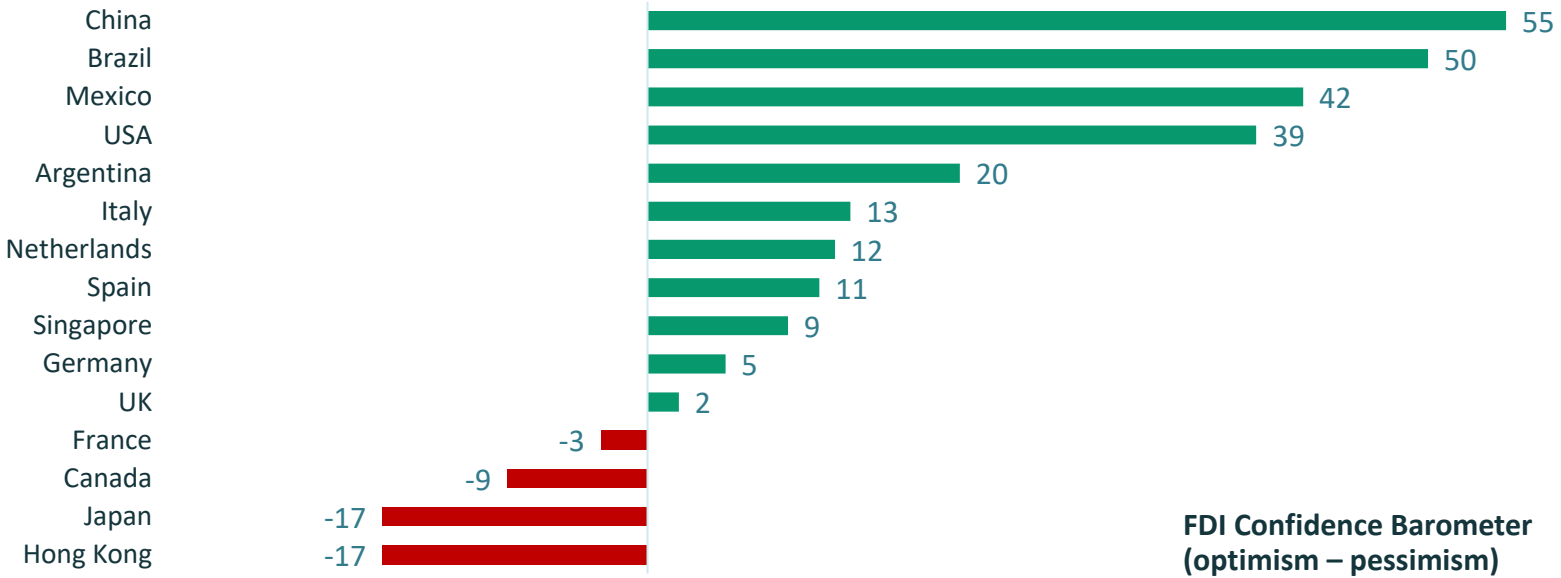


dvj insights Q. Overall, are you more or less optimistic about the global economy then you were last year?

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Global picture hides huge range across markets.

China has highest levels of net optimism for the global economy whilst Japan and Hong Kong have a negative score.



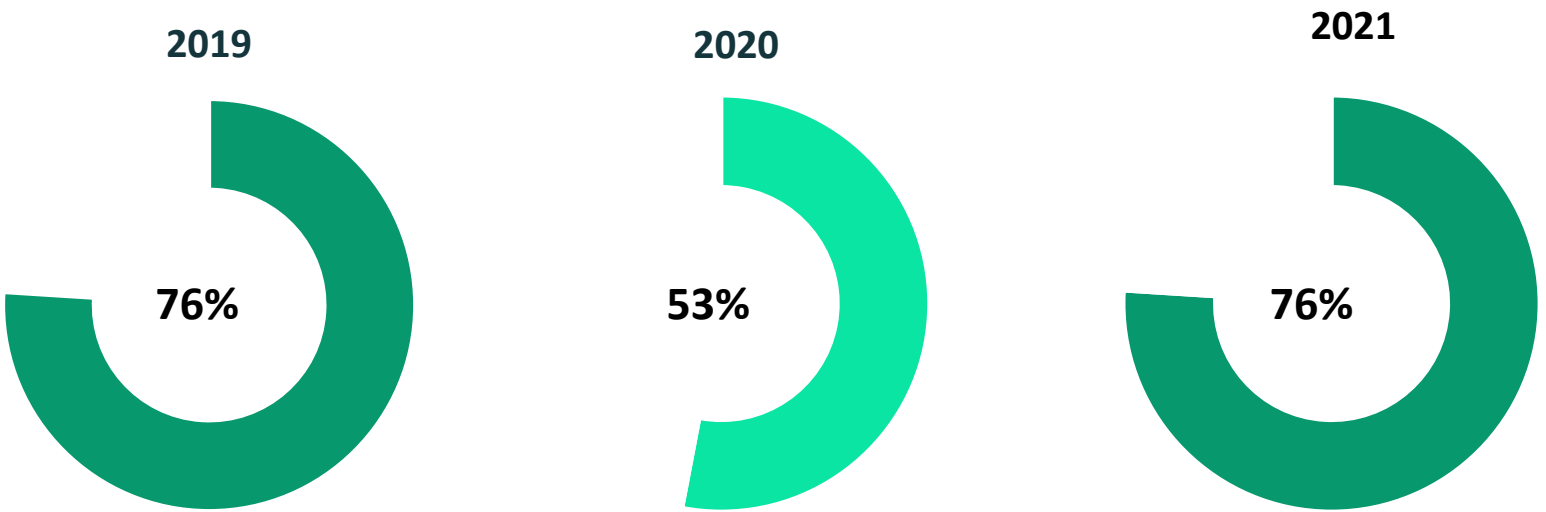
FDI Confidence Barometer (optimism – pessimism)

dvj insights Q. Overall, are you more or less optimistic about the global economy then you were last year?

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FDI’s are expansionist, investment plans are back to pre pandemic levels.

Three quarters will expand in next 1 – 3 years, back to same level as 2019.

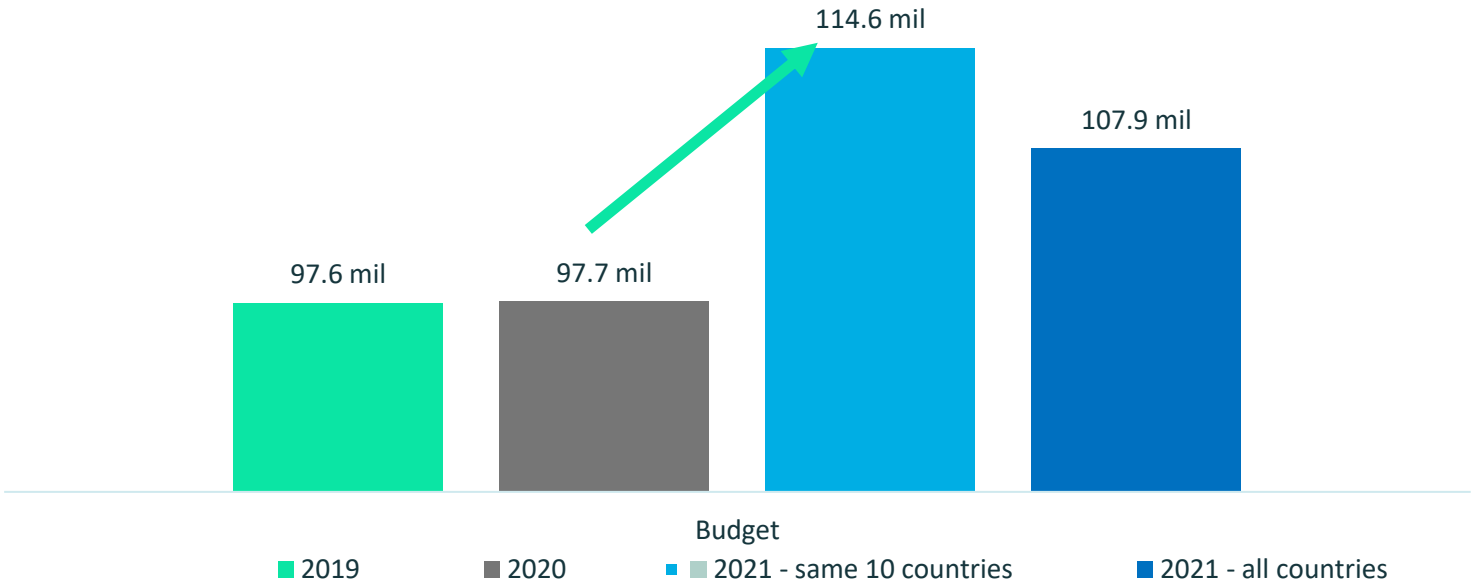


dvj insights Q. Do you plan to expand operations internationally in the next 1-3 years?

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It’s an essential time to reach FDI’s.

Budgets have increased from 2019, and are now in excess of $100 million.



dvj insights Q. Which of the following bands would you say best represents the budget your company has for foreign direct investment in the next 1-3 years ?

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Current FDI Landscape.



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Political stability and rule of law are as important as ever for making FDI decisions.

Investors from different regions have different conditions that need to be met.

'Extremely important' only – top three conditions



Political stability	48%
Rule of law	41%
Good infrastructure	40%



Political stability	49%
Rule of law	41%
High productivity	38%



High productivity	56%
Availability of technological skills	51%
Political stability	50%



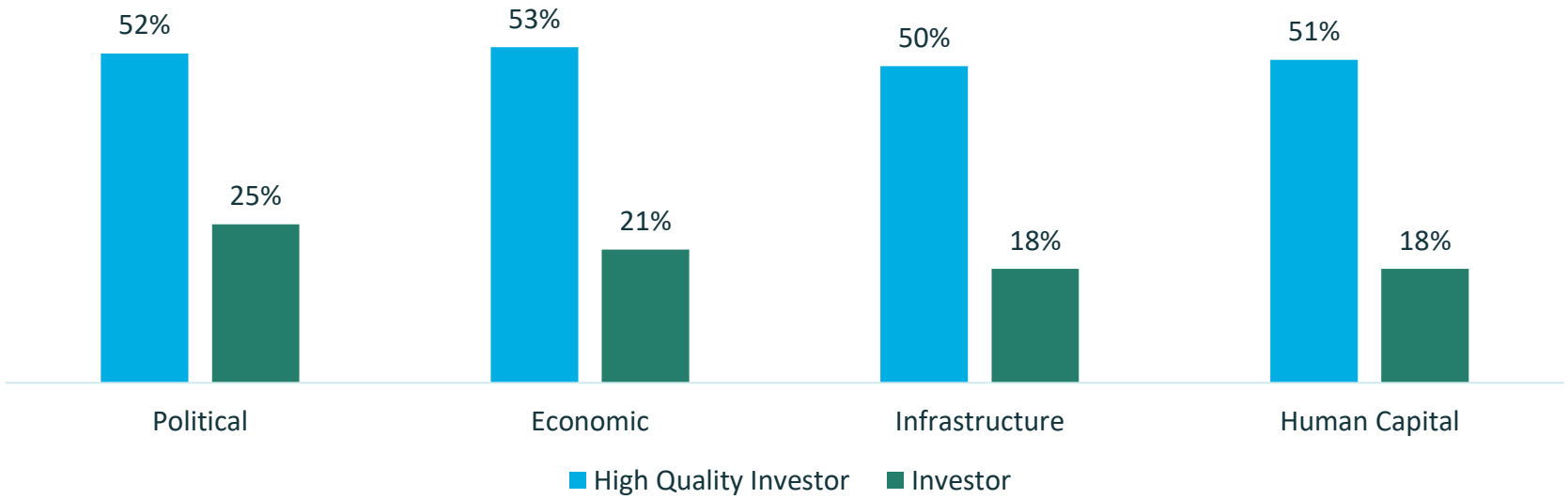
Stability and predictability of taxation	66%
High productivity	64%
Highly skilled workforce	62%

dvj insights Q. On a scale of 1 to 5, where 1 means "Not at all important" and 5 means "Extremely important", please indicate how important each of the conditions mentioned below are for your foreign direct investment decisions?

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Quality investors have a lower tolerance and higher hurdles for investment conditions to be met.

'Extremely important' only – top three conditions

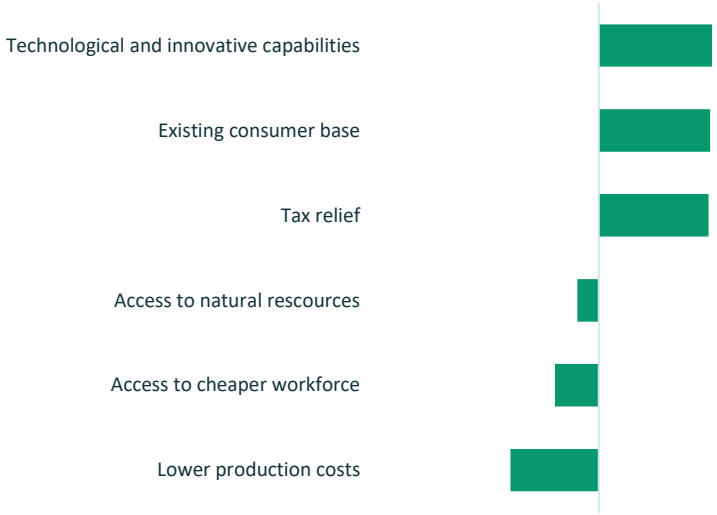


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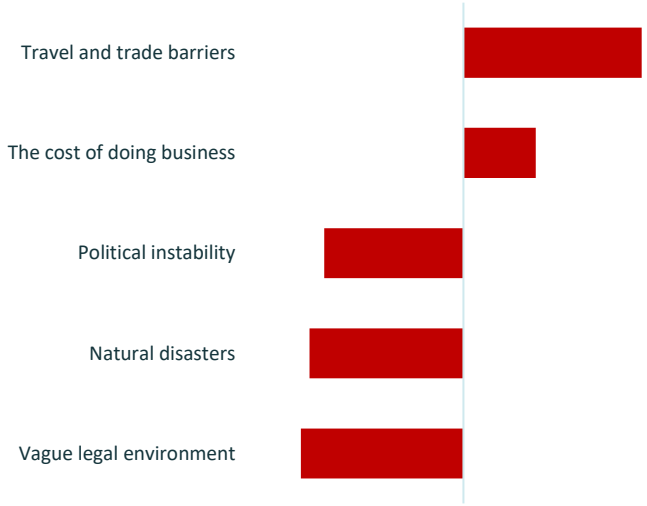
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Innovation, customers, tax and skilled workforce are the main drivers for investing in Ireland.

Key Drivers for investing in Ireland vs global average



Key risks for investing in Ireland vs global average



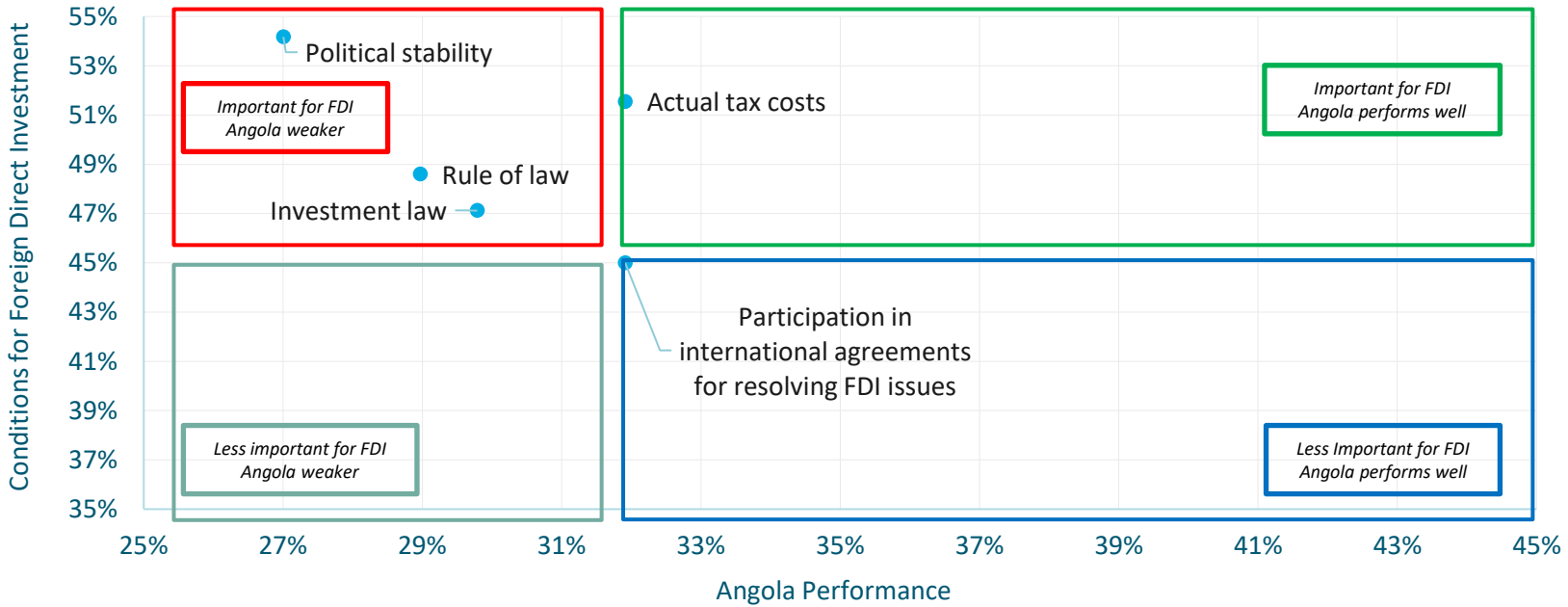
dvj insights Q. Thinking about the countries you are considering investing in in the next 1-3 years, what would be the key drivers for your investment project(s)?
Q. Thinking about the countries you are considering investing in in the next 1-3 years, what would be the key risks for your investment project(s)?
:

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Political conditions for investing in Angola.

Political stability is an area which is very important for FDI's and so this is an area where Angola should look to shift into the top-right box.

Angola performance vs FDI conditions for investing



dvj insights Q. On a scale of 1 to 5, where 1 means "Not at all important" and 5 means "Extremely important", please indicate how important each of the conditions mentioned below are for your foreign direct investment decisions? Q. How well does Angola perform in each of these detailed investment areas

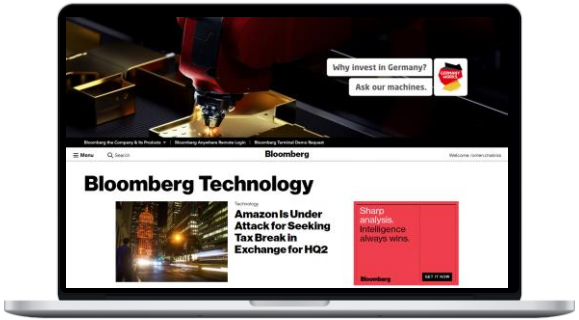
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Return on Research Investment.



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From banners & content to purpose built smart papers.



Digital Display

Digital display units to promote a countries investment opportunities

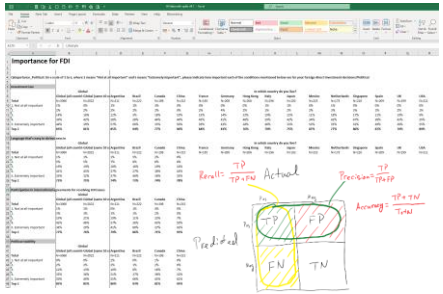


Branded Content

Multi year branded content partnerships that include a mix of data visualisation, editorial and long form video to promote a countries vast investment opportunities .

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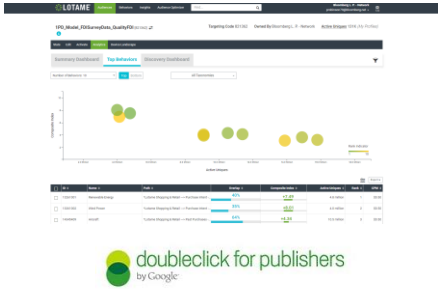
From Excel cells to sellable segments.



IDENTIFICATION

Results delivered in Excel and from these tables we create classification based ML models and calculate the accuracy of our models through confusion matrix.

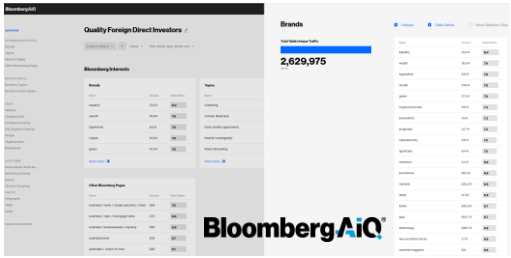
This enables us to identify the best classifiers to create bespoke audiences.



REVENUE

We build the audiences using correlated first party data overlaid with company surge data in our Data Management Platform. Once populated we activate in our ad management system.

This enables us to sell & target audiences across Bloomberg.com.



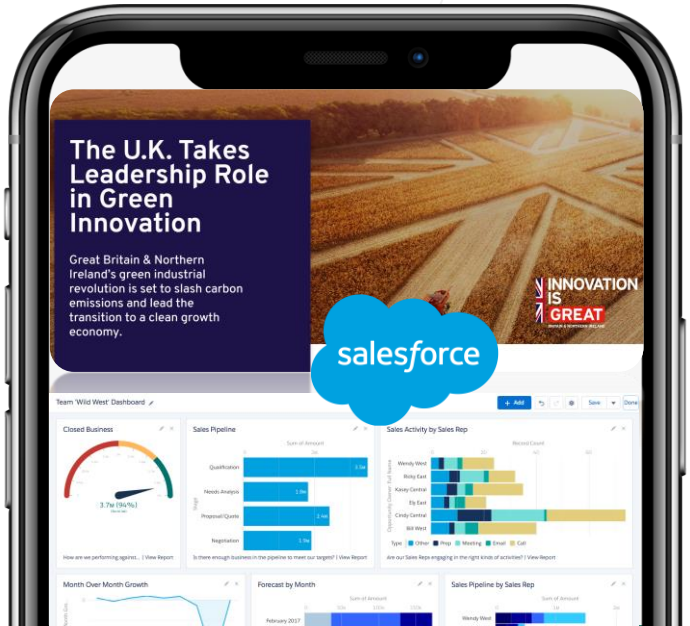
INSIGHT

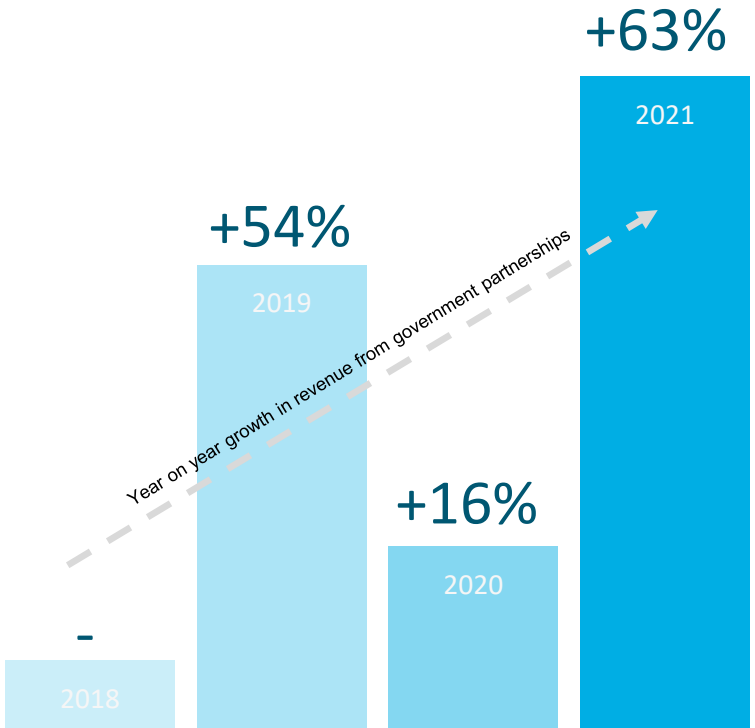
We then push the audience to our data science driven platform for audience insight and content analysis

This enables us to provide unique insights into FDI's interests and behaviour.

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And the revenue growth speaks for itself.






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Thank you.