

Dun & Bradstreet – Compliance and Procurement Sentiment Index Wave 2

METHODOLOGY NOTE

ComRes interviewed 308 Compliance decision makers and 309 Procurement decision makers with knowledge of and or responsibility in the decision-making process for their company's compliance/procurement function between 6th and 25th July 2018. Data were not weighted. ComRes is a member of the British Polling Council and abides by its rules.

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Compliance and Procurement Sentiment - Wave 2

| | |
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| Country | 1 |
| Base: All respondents | |
| S1. Which of the following describes the area(s) in which you work? If you work in more than one of the following areas, please select all that apply. | 2 |
| Base: All respondents | |
| DS1. least fill selection for Compliance/ Procurement | 3 |
| Base: All respondents | |
| S2. Do you have knowledge and/ or responsibility in the decision-making for your company's compliance/ procurement function? | 4 |
| Base: All respondents | |
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| Base: All respondents | |
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| Base: All respondents | |
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| Base: All respondents | |
| Q3_4. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on. Vendor management | 18 |
| Base: All respondents | |
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| Base: All respondents | |
| Q3_6. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on. Data management | 20 |
| Base: All respondents | |
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| Base: All respondents | |
| Q3_9. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on. Supplier spend analysis | 23 |
| Base: All respondents | |
| Q3_10. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on. Other | 24 |
| Base: All respondents | |
| Q4. To what extent would you say that existing regulation has increased or decreased the risk to your business/ to the procurement process in your business in the last 3 months? | 25 |
| Base: All respondents | |
| Q4. To what extent would you say that existing regulation has increased or decreased the risk to your business/ to the procurement process in your business in the last 3 months? | 26 |
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| Base: All respondents | |
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| Base: All respondents | |
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| Base: All respondents (excluding don't know) | |
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| Base: All respondents (excluding don't know or not applicable) | |
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| Q8c. And which of the following, if any, do you think contributed towards the fraud? | 116 |
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| Base: All respondents | |
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| Base: All respondents | |
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| Base: All respondents | |
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| Base: All respondents (excluding don't know) | |
| Q9_1. To what extent do you feel that you have the resources that you need to comply with existing and new legislation? New legislation | 122 |
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| Base: All who work in both compliance and procurement (excluding none) | |
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| Base: All who work in either compliance or procurement, but not both | |
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| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |

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| Q12_SUM. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following? SUMMARY TABLE | 130 |
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| Base: All who work in either compliance or procurement, but not both | |
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| Base: All who work in either compliance or procurement, but not both | |
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| Base: All who work in either compliance or procurement, but not both | |
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| Base: All who work in either compliance or procurement, but not both | |
| Q12_7. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following? Developing and guiding policy and procedure (creating best practice) | 137 |
| Base: All who work in either compliance or procurement, but not both | |
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| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
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| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
| Q12_2. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following? Laws and regulation | 142 |
| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
| Q12_3. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following? Market research and analysis | 143 |
| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
| Q12_4. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following? Vendor management | 144 |
| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
| Q12_5. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following? Process management | 145 |
| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
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| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
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| Base: All who work in either compliance or procurement, but not both (excluding don't know) | |
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| Base: All respondents | |
| Q13a. To what extent, if at all, do you feel able to respond to the evolving global sanctions environment? For example the reimposition of sanctions against Iran. | 151 |
| Base: All respondents (excluding don't know) | |
| Q13b. You indicated that you are able to/ are not able to respond to changes to the evolving global sanctions environment. Please state why you are able to/ are not able to meet these changes. | 152 |
| Base: All respondents who are able/not able to respond to the evolving global sanctions environment | |
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| Base: All respondents who are able to respond to the evolving global sanctions environment | |
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| Base: All respondents who are not able to respond to the evolving global sanctions environment | |

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Country

Base: All respondents

Significance Level: 95%

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|---|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| UK | 210 34% | - - | 210 100% | 105 34% | 105 34% | 53 34% | 41 28% | 37 34% | 79 39% | 34 39% | 68 30% | 97 35% | 33 9% | 19 53% | 9 26% | 155 84% | 15 41% | 37 43% | 54 52% | 37 35% | 31 45% | 31 46% |
| | | | a | | | | | b | | | | | | ac | a | abcef | a | a | b | | | |
| USA | 407 66% | 407 100% | - - | 203 66% | 204 66% | 105 66% | 105 72% | 72 66% | 124 61% | 53 61% | 157 70% | 179 65% | 343 91% | 17 47% | 25 74% | 30 16% | 22 59% | 50 57% | 50 48% | 68 65% | 38 55% | 37 54% |
| | | b | | | | | d | | | | | | bdef | d | bd | d | d | | a | | | |

Compliance and Procurement Sentiment - Wave 2

S1. Which of the following describes the area(s) in which you work? If you work in more than one of the following areas, please select all that apply.

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|-------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Compliance | 360 58% | 234 57% | 126 60% | 308 100% | 52 17% | 99 63% | 85 58% | 64 59% | 111 55% | 53 61% | 148 66% | 142 51% | 219 58% | 13 36% | 19 56% | 106 57% | 19 51% | 55 63% | 80 77% | 48 46% | 36 52% | 31 46% |
| Procurement | 404 65% | 270 66% | 134 64% | 95 31% | 309 100% | 110 70% | 106 73% | 70 64% | 118 58% | 62 71% | 148 66% | 178 64% | 250 66% | 26 72% | 25 74% | 120 65% | 26 70% | 57 66% | 48 46% | 82 78% | 54 78% | 43 63% |
| IT | 221 36% | 142 35% | 79 38% | 125 41% | 96 31% | 58 37% | 67 46% | 48 44% | 48 24% | 35 40% | 100 44% | 82 30% | 142 38% | 19 53% | 22 65% | 70 38% | 23 62% | 38 44% | 44 42% | 37 35% | 31 45% | 11 16% |
| Operations | 276 45% | 186 46% | 90 43% | 150 49% | 126 41% | 107 68% | 70 48% | 44 40% | 55 27% | 59 68% | 114 51% | 94 34% | 176 47% | 12 33% | 18 53% | 79 43% | 17 46% | 43 49% | 46 44% | 37 35% | 39 57% | 17 25% |
| Risk | 177 29% | 112 28% | 65 31% | 122 40% | 55 18% | 47 30% | 47 32% | 35 32% | 48 24% | 28 32% | 71 32% | 75 27% | 106 28% | 10 28% | 12 35% | 55 30% | 12 32% | 35 40% | 33 32% | 24 23% | 21 30% | 7 10% |
| Finance | 214 35% | 131 32% | 83 40% | 122 40% | 92 30% | 82 52% | 62 42% | 36 33% | 34 17% | 48 55% | 100 44% | 62 22% | 136 36% | 14 39% | 13 38% | 67 36% | 16 43% | 33 38% | 52 50% | 30 29% | 28 41% | 9 13% |
| Legal | 126 20% | 78 19% | 48 23% | 89 29% | 37 12% | 47 30% | 35 24% | 22 20% | 22 11% | 30 34% | 57 25% | 36 13% | 76 20% | 7 19% | 9 26% | 35 19% | 7 19% | 22 25% | 23 22% | 18 17% | 14 20% | 3 4% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

DS1. least fill selection for Compliance/ Procurement

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Compliance | 308 50% | 203 50% | 105 50% | 308 100% | - - | 83 53% | 64 44% | 58 53% | 102 50% | 45 52% | 119 53% | 127 46% | 190 51% | 13 36% | 16 47% | 92 50% | 17 46% | 43 49% | 70 67% | 40 38% | 31 45% | 29 43% |
| Procurement | 309 50% | 204 50% | 105 50% | - - | 309 100% | 75 47% | 82 56% | 51 47% | 101 50% | 42 48% | 106 47% | 149 54% | 186 49% | 23 64% | 18 53% | 93 50% | 20 54% | 44 51% | 34 33% | 65 62% | 38 55% | 39 57% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

S2. Do you have knowledge and/ or responsibility in the decision-making for your company's compliance/ procurement function?

Base: All respondents

Significance Level: 95%

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|---|----------|------|------|------------|-------------|---------------|--------|-----------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | | | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| I am the decision-maker | 342 | 230 | 112 | 161 | 181 | 109 | 91 | 70 | 72 | 71 | 143 | 122 | 213 | 30 | 25 | 100 | 26 | 55 | 61 | 64 | 41 | 24 |
| | 55% | 57% | 53% | 52% | 59% | 69% | 62% | 64% | 35% | 82% | 64% | 44% | 57% | 83% | 74% | 54% | 70% | 63% | 59% | 61% | 59% | 35% |
| | | | | | | d | d | d | | bc | c | | | adf | d | | | | d | d | d | |
| I participate in decision-making | 275 | 177 | 98 | 147 | 128 | 49 | 55 | 39 | 131 | 16 | 82 | 154 | 163 | 6 | 9 | 85 | 11 | 32 | 43 | 41 | 28 | 44 |
| | 45% | 43% | 47% | 48% | 41% | 31% | 38% | 36% | 65% | 18% | 36% | 56% | 43% | 17% | 26% | 46% | 30% | 37% | 41% | 39% | 41% | 65% |
| | | | | | | abc | | | | a | ab | | b | | | bc | b | | | | | abc |
| I know about compliance/ procurement management at my organisation, but am not directly involved in the decision-making | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| I am not involved in the decision-making nor do I know about compliance/ procurement management at my organisation | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

D1. How many people are employed by your organisation globally?

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|-------------------------|-------------|-------------|-------------|-------------|-------------|--------------------|--------------------|--------------------|--------------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------------|--------------------|-----------------|-----------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| 1-10 | 57 9% | 32 8% | 25 12% | 28 9% | 29 9% | 57 36% bcd | - - | - - | - - | 48 55% bc | 6 3% c | - - | 27 7% | 1 3% | 1 3% | 19 10% | 2 5% | 3 3% | 8 8% | 3 3% | 10 14% bd | 2 3% |
| 11-50 | 101 16% | 73 18% | 28 13% | 55 18% | 46 15% | 101 64% bcd | - - | - - | - - | 22 25% c | 62 28% c | 10 4% | 71 19% f | 6 17% | 6 18% | 27 15% | 4 11% | 6 7% | 16 15% d | 19 18% d | 12 17% d | 3 4% |
| 51-250 | 146 24% | 105 26% | 41 20% | 64 21% | 82 27% | - - | 146 100% acd | - - | - - | 15 17% | 80 36% ac | 49 18% | 96 26% | 7 19% | 5 15% | 36 19% | 6 16% | 21 24% | 24 23% | 38 36% ad | 17 25% | 8 12% |
| 251-1,000 | 109 18% | 72 18% | 37 18% | 58 19% | 51 17% | - - | - - | 109 100% abd | - - | 2 2% | 54 24% a | 52 19% a | 68 18% | 12 33% a | 8 24% | 42 23% | 13 35% af | 16 18% | 18 17% | 17 16% | 17 25% | 12 18% |
| More than a 1,000 | 203 33% | 124 30% | 79 38% | 102 33% | 101 33% | - - | - - | - - | 203 100% abc | - - | 23 10% a | 165 60% ab | 113 30% | 10 28% | 14 41% | 61 33% | 12 32% abd | 41 47% abd | 38 37% c | 28 27% | 13 19% | 42 62% abc |
| Prefer not to say | 1 * | 1 * | - - | 1 * | - - | - - | - - | - - | - - | - - | - - | - - | 1 * | - - | - - | - - | - - | - - | - - | - - | - - | 1 1% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: 1-50 | 158 26% | 105 26% | 53 25% | 83 27% | 75 24% | 158 100% bcd | - - | - - | - - | 70 80% bc | 68 30% c | 10 4% | 98 26% f | 7 19% | 7 21% | 46 25% f | 6 16% | 9 10% | 24 23% d | 22 21% d | 22 32% d | 5 7% |

Columns Tested: a-b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

D2. Which of the following best reflects your company's annual turnover? If you are unsure, please select the band that you believe is most accurate.

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|-------------|-------------|-------------|------------------|---------------|------------------|-------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------------|--------------------|------------------|------------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Under £/\$ 1 million | 87 14% | 53 13% | 34 16% | 45 15% | 42 14% | 70 44% | 15 10% | 2 2% | - | 87 100% | - | - | 44 12% | 5 14% | 3 9% | 23 12% | 3 8% | 11 13% | 15 14% | 7 7% | 17 25% | 3 4% |
| Between £/\$ 1 million and £/\$ 10 million | 225 36% | 157 39% | 68 32% | 119 39% | 106 34% | 68 43% | 80 55% | 54 50% | 23 11% | - | 225 100% | - | 151 40% | 21 58% | 16 47% | 74 40% | 20 54% | 22 25% | 37 36% | 41 39% | 26 38% | 17 25% |
| Above £/\$ 10 million | 276 45% | 179 44% | 97 46% | 127 41% | 149 48% | 10 6% | 49 34% | 52 48% | 165 81% | - | - | 276 100% | 166 44% | 10 28% | 15 44% | 79 43% | 14 38% | 51 59% | 48 46% | 55 52% | 25 36% | 35 51% |
| Prefer not to say | 29 5% | 18 4% | 11 5% | 17 6% | 12 4% | 10 6% | 2 1% | 1 1% | 15 7% | - | - | - | 15 4% | - | - | 9 5% | - | 3 3% | 4 4% | 2 2% | 1 1% | 13 19% |
| Columns Tested: | a, b | a, b | a, b, c, d | a, b, c | a, b, c, d, e, f | a, b, c, d | a, b, c, d, e, f | a, b, c, d | a, b, c, d | a, b, c | a, b, c | a, b, c | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f | a, b, c, d, e, f |

Compliance and Procurement Sentiment - Wave 2

D3. Which of the following best describes your company sector?

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|---|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Financial services (e.g. banking, accounting, credit institutions, card payments, others) | 104 17% | 50 12% | 54 26% | 70 23% | 34 11% | 24 15% | 24 16% | 18 17% | 38 19% | 15 17% | 37 16% | 48 17% | 57 15% | 9 25% | 8 24% | 47 25% | 14 38% | 17 20% | 104 100% | - - | - - | - - |
| Auditing | 8 1% | 6 1% | 2 1% | 7 2% | 1 * | 3 2% | 2 1% | 2 2% | 1 * | 1 1% | 5 2% | 2 1% | 6 2% | 1 3% | 1 3% | 3 2% | - - | - - | - - | - - | - - | - - |
| Legal | 27 4% | 18 4% | 9 4% | 16 5% | 11 4% | 8 5% | 4 3% | 9 8% | 6 3% | 3 3% | 16 7% | 8 3% | 18 5% | 2 6% | 4 12% | 7 4% | 2 5% | 5 6% | - - | - - | - - | - - |
| Manufacturing | 105 17% | 68 17% | 37 18% | 40 13% | 65 21% | 22 14% | 38 26% | 17 16% | 28 14% | 7 8% | 41 18% | 55 20% | 59 16% | 6 17% | 4 12% | 37 20% | 7 19% | 17 20% | - - | 105 100% | - - | - - |
| Oil and gas | 18 3% | 11 3% | 7 3% | 5 2% | 13 4% | 2 1% | 1 1% | 3 3% | 12 6% | 3 3% | 4 2% | 10 4% | 6 2% | 5 14% | 5 15% | 6 3% | 2 5% | 7 8% | - - | - - | - - | - - |
| Utilities | 22 4% | 12 3% | 10 5% | 8 3% | 14 5% | 2 1% | 5 3% | 3 3% | 12 6% | 1 1% | 7 3% | 14 5% | 10 3% | 1 3% | 2 6% | 11 6% | - - | 2 2% | - - | - - | - - | - - |
| Logistics | 26 4% | 15 4% | 11 5% | 13 4% | 13 4% | 6 4% | 10 7% | 5 5% | 5 2% | 3 3% | 13 6% | 10 4% | 16 4% | 2 6% | 2 6% | 8 4% | 3 8% | 3 3% | - - | - - | - - | - - |
| Retail | 69 11% | 38 9% | 31 15% | 31 10% | 38 12% | 22 14% | 17 12% | 17 16% | 13 6% | 17 20% | 26 12% | 25 9% | 40 11% | 3 8% | 1 3% | 21 11% | 2 5% | 9 10% | - - | - - | 69 100% | - - |
| Government agencies | 68 11% | 37 9% | 31 15% | 29 9% | 39 13% | 5 3% | 8 5% | 12 11% | 42 21% | 3 3% | 17 8% | 35 13% | 35 9% | 2 6% | 2 6% | 25 14% | 1 3% | 5 6% | - - | - - | - - | 68 100% |
| Fast-moving consumer goods (FMCG) | 5 1% | - - | 5 2% | 3 1% | 2 1% | 2 1% | 1 1% | 1 1% | 1 * | - - | 4 2% | 1 * | 1 * | 1 3% | 1 3% | 3 2% | - - | 2 2% | - - | - - | - - | - - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

D3. Which of the following best describes your company sector?

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Consumer packaged goods (CPG) | 12 2% | 12 3% | - - | 3 1% | 9 3% | 3 2% | 2 1% | 4 4% | 3 1% | - - | 5 2% | 6 2% | 10 3% | - - | 1 3% | 1 1% | 1 3% | 1 1% | - - | - - | - - | - - |
| Pharmaceuticals | 14 2% | 14 3% | - - | 11 4% | 3 1% | 1 1% | 1 1% | 4 4% | 8 4% | 1 1% | 6 3% | 7 3% | 10 3% | 2 6% | - - | 2 1% | 1 3% | 3 3% | - - | - - | - - | - - |
| Other | 139 23% | 126 31% | 13 6% | 72 23% | 67 22% | 58 37% | 33 23% | 14 13% | 34 17% | 33 38% | 44 20% | 55 20% | 108 29% | 2 6% | 3 9% | 14 8% | 4 11% | 16 18% | - - | - - | - - | - - |
| | | b | | bcd | | c | | | bc | | | | bcde | | | | d | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

D4. Which of the following locations do you support in your onboarding activity?

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------------|-------------|-----------------|-----------------|-------------|---------------|-------------|----------------|------------------|-----------------|---------------------|--|----------------------|----------------------|--|----------------------------------|---------------------------|---------------------------------|---------------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| North America | 376 61% | 343 84% b | 33 16% | 190 62% | 186 60% | 98 62% | 96 66% | 68 62% | 113 56% | 44 51% | 151 67% a | 166 60% | 376 100% bcdef | 26 72% df | 31 91% bdf | 56 30% f | 32 86% df | - | 57 55% | 59 56% | 40 58% | 35 51% |
| Latin America (including Mexico) | 34 6% | 25 6% | 9 4% | 16 5% | 18 6% | 7 4% | 5 3% | 8 7% | 14 7% | 3 3% | 16 7% | 15 5% | 31 f | 13 36% abdef | 34 100% abdef | 14 8% f | 12 32% adf | - | 8 8% | 4 4% | 1 1% | 2 3% |
| Middle East & North Africa | 31 5% | 14 3% | 17 8% a | 12 4% | 19 6% | 6 4% | 5 3% | 12 11% abd | 8 4% | 3 3% | 20 9% c | 8 3% | 24 6% f | 31 86% acdef | 11 32% adf | 19 10% f | 12 32% adf | - | 9 9% | 6 6% | 3 4% | 2 3% |
| Europe (including Turkey) | 185 30% | 30 7% | 155 74% a | 92 30% | 93 30% | 46 29% | 36 25% | 42 39% b | 61 30% | 23 26% | 74 33% c | 79 29% | 56 15% f | 22 61% af | 14 41% af | 185 100% abcef | 24 65% acf | - | 47 45% | 37 35% | 21 30% | 25 37% |
| Africa (Sub Saharan) | 14 2% | 7 2% | 7 3% | 7 2% | 7 2% | 2 1% | 2 1% | 5 5% a | 5 2% | 2 2% | 7 3% | 5 2% | 10 3% f | 14 39% ade | 8 24% adf | 11 6% f | 4 11% af | - | 2 2% | 1 1% | - | - |
| Asia-Pacific (including Russia) | 37 6% | 22 5% | 15 7% | 17 6% | 20 6% | 6 4% | 6 4% | 13 12% ab | 12 6% | 3 3% | 20 9% a | 14 5% | 32 9% f | 12 33% adf | 12 35% adf | 24 13% f | 37 100% abcd | - | 14 13% cd | 7 7% | 2 3% | 1 1% |
| Global | 87 14% | 50 12% | 37 18% | 43 14% | 44 14% | 9 6% | 21 14% a | 16 15% a | 41 20% a | 11 13% | 22 10% a | 51 18% b | - | - | - | - | - | 87 100% abcde | 17 16% | 17 16% | 9 13% | 5 7% |
| Prefer not to say | 14 2% | 4 1% | 10 5% a | 8 3% | 6 2% | 7 4% | 2 1% | - | 5 2% | 5 6% | 3 1% | 4 1% | - | - | - | - | - | - | - | 3 3% | 3 4% | 3 4% a |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q1. How confident, if at all, are you in the current effectiveness of compliance/ procurement as a function?

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|----------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very confident (5.0) | 267 43% | 188 46% | 79 38% | 129 42% | 138 45% | 67 42% | 66 45% | 48 44% | 86 42% | 39 45% | 89 40% | 129 47% | 172 46% | 21 58% | 21 62% | 71 38% | 20 54% | 47 54% | 48 46% | 43 41% | 25 36% | 24 35% |
| Fairly confident (4.0) | 276 45% | 177 43% | 99 47% | 141 46% | 135 44% | 56 35% | 71 49% | 51 47% | 97 48% | 32 37% | 108 48% | 123 45% | 173 46% | 12 33% | 8 24% | 90 49% | 12 32% | 29 33% | 43 41% | 51 49% | 36 52% | 37 54% |
| Neutral (3.0) | 53 9% | 27 7% | 26 12% | 27 9% | 26 8% | 30 19% | 6 4% | 6 6% | 11 5% | 14 16% | 20 9% | 13 5% | 22 6% | 3 8% | 3 9% | 17 9% | 3 8% | 7 8% | 10 10% | 8 8% | 7 10% | 4 6% |
| Not very confident (2.0) | 20 3% | 14 3% | 6 3% | 10 3% | 10 3% | 4 3% | 3 2% | 4 4% | 9 4% | 2 2% | 7 3% | 11 4% | 8 2% | - | 2 6% | 7 4% | 2 5% | 4 5% | 3 3% | 3 3% | 1 1% | 3 4% |
| Not at all confident (1.0) | 1 * | 1 * | - | 1 * | - | 1 1% | - | - | - | - | 1 * | - | 1 * | - | - | - | - | - | - | - | - | - |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Confident | 543 88% | 365 90% | 178 85% | 270 88% | 273 88% | 123 78% | 137 94% | 99 91% | 183 90% | 71 82% | 197 88% | 252 91% | 345 92% | 33 92% | 29 85% | 161 87% | 32 86% | 76 87% | 91 88% | 94 90% | 61 88% | 61 90% |
| Net: Not confident | 21 3% | 15 4% | 6 3% | 11 4% | 10 3% | 5 3% | 3 2% | 4 4% | 9 4% | 2 2% | 8 4% | 11 4% | 9 2% | - | 2 6% | 7 4% | 2 5% | 4 5% | 3 3% | 3 3% | 1 1% | 3 4% |
| Mean score | 4.28 | 4.32 | 4.20 | 4.26 | 4.30 | 4.16 | 4.37 | 4.31 | 4.28 | 4.24 | 4.23 | 4.34 | 4.35 | 4.50 | 4.41 | 4.22 | 4.35 | 4.37 | 4.31 | 4.28 | 4.23 | 4.21 |
| Standard deviation | .77 | .77 | .76 | .78 | .76 | .87 | .66 | .74 | .76 | .81 | .77 | .75 | .71 | .65 | .89 | .76 | .86 | .82 | .76 | .73 | .69 | .74 |
| Standard error | .03 | .04 | .05 | .04 | .04 | .07 | .05 | .07 | .05 | .09 | .05 | .05 | .04 | .11 | .15 | .06 | .14 | .09 | .07 | .07 | .08 | .09 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q2. How confident, if at all, are you in the future effectiveness of compliance/ procurement as a function?

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very confident (5.0) | 288 47% | 203 50% | 85 40% | 145 47% | 143 46% | 63 40% | 69 47% | 57 52% | 99 49% | 38 44% | 103 46% | 137 50% | 185 49% | 20 56% | 15 44% | 71 38% | 15 41% | 50 57% | 53 51% | 41 39% | 30 43% | 29 43% |
| Fairly confident (4.0) | 252 41% | 162 40% | 90 43% | 127 41% | 125 40% | 63 40% | 65 45% | 38 35% | 85 42% | 34 39% | 94 42% | 113 41% | 157 42% | 13 36% | 15 44% | 88 48% | 17 46% | 24 28% | 38 37% | 48 46% | 31 45% | 30 44% |
| Neutral (3.0) | 55 9% | 27 7% | 28 13% | 25 8% | 30 10% | 26 16% | 9 6% | 11 10% | 9 4% | 11 13% | 23 10% | 17 6% | 23 6% | 2 6% | 3 9% | 21 11% | 4 11% | 8 9% | 10 10% | 12 11% | 7 10% | 3 4% |
| Not very confident (2.0) | 17 3% | 12 3% | 5 2% | 7 2% | 10 3% | 3 2% | 3 2% | 3 3% | 8 4% | 3 3% | 5 2% | 8 3% | 9 2% | 1 3% | 1 3% | 3 2% | 1 3% | 4 5% | 2 2% | 3 3% | 1 1% | 5 7% |
| Not at all confident (1.0) | 1 * | - - | 1 * | - - | 1 * | - - | - - | - - | 1 * | - - | - - | 1 * | - - | - - | - - | 1 1% | - - | - - | - - | - - | - - | 1 1% |
| Don't know | 4 1% | 3 1% | 1 * | 4 1% | - - | 3 2% | - - | - - | 1 * | 1 1% | - - | - - | 2 1% | - - | - - | 1 1% | - - | 1 1% | 1 1% | 1 1% | - - | - - |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Confident | 540 88% | 365 90% | 175 83% | 272 88% | 268 87% | 126 80% | 134 92% | 95 87% | 184 91% | 72 83% | 197 88% | 250 91% | 342 91% | 33 92% | 30 88% | 159 86% | 32 86% | 74 85% | 91 88% | 89 85% | 61 88% | 59 87% |
| Net: Not confident | 18 3% | 12 3% | 6 3% | 7 2% | 11 4% | 3 2% | 3 2% | 3 3% | 9 4% | 3 3% | 5 2% | 9 3% | 9 2% | 1 3% | 1 3% | 4 2% | 1 3% | 4 5% | 2 2% | 3 3% | 1 1% | 6 9% |
| Mean score | 4.32 | 4.38 b | 4.21 | 4.35 | 4.29 | 4.20 | 4.37 a | 4.37 | 4.35 | 4.24 | 4.31 | 4.37 | 4.39 d | 4.44 | 4.29 | 4.22 | 4.24 | 4.40 | 4.38 | 4.22 | 4.30 | 4.19 |
| Standard deviation | .76 | .74 | .80 | .73 | .80 | .78 | .69 | .78 | .79 | .81 | .74 | .76 | .71 | .73 | .76 | .75 | .76 | .84 | .74 | .76 | .71 | .93 |
| Standard error | .03 | .04 | .06 | .04 | .05 | .06 | .06 | .07 | .06 | .09 | .05 | .05 | .04 | .12 | .13 | .06 | .12 | .09 | .07 | .07 | .09 | .11 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q2. How confident, if at all, are you in the future effectiveness of compliance/ procurement as a function?

Base: All respondents (excluding don't know)

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|---------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| | a | b | | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | | |
| Total | 613 100% | 404 100% | 209 100% | 304 100% | 309 100% | 155 100% | 146 100% | 109 100% | 202 100% | 86 100% | 225 100% | 276 100% | 374 100% | 36 100% | 34 100% | 184 100% | 37 100% | 86 100% | 103 100% | 104 100% | 69 100% | 68 100% | |
| Very confident (5.0) | 288 47% | 203 50% | 85 41% | 145 48% | 143 46% | 63 41% | 69 47% | 57 52% | 99 49% | 38 44% | 103 46% | 137 50% | 185 49% | 20 56% | 15 44% | 71 39% | 15 41% | 50 58% | 53 51% | 41 39% | 30 43% | 29 43% | |
| Fairly confident (4.0) | 252 41% | 162 40% | 90 43% | 127 42% | 125 40% | 63 41% | 65 45% | 38 35% | 85 42% | 34 40% | 94 42% | 113 41% | 157 42% | 13 36% | 15 44% | 88 48% | 17 46% | 24 28% | 38 37% | 48 46% | 31 45% | 30 44% | |
| Neutral (3.0) | 55 9% | 27 7% | 28 13% | 25 8% | 30 10% | 26 17% | 9 6% | 11 10% | 9 4% | 11 13% | 23 10% | 17 6% | 23 6% | 2 6% | 3 9% | 21 11% | 4 11% | 8 9% | 10 10% | 12 12% | 7 10% | 3 4% | |
| Not very confident (2.0) | 17 3% | 12 3% | 5 2% | 7 2% | 10 3% | 3 2% | 3 2% | 3 3% | 8 4% | 3 3% | 5 2% | 8 3% | 9 2% | 1 3% | 1 3% | 3 2% | 1 3% | 4 5% | 2 2% | 3 3% | 1 1% | 5 7% | |
| Not at all confident (1.0) | 1 * | - - | 1 * | - - | 1 * | - - | - - | - - | 1 * | - - | - - | 1 * | - - | - - | - - | 1 1% | - - | - - | - - | - - | - - | - - | 1 1% |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Confident | 540 88% | 365 90% | 175 84% | 272 89% | 268 87% | 126 81% | 134 92% | 95 87% | 184 91% | 72 84% | 197 88% | 250 91% | 342 91% | 33 92% | 30 88% | 159 86% | 32 86% | 74 86% | 91 88% | 89 86% | 61 88% | 59 87% | |
| Net: Not confident | 18 3% | 12 3% | 6 3% | 7 2% | 11 4% | 3 2% | 3 2% | 3 3% | 9 4% | 3 3% | 5 2% | 9 3% | 9 2% | 1 3% | 1 3% | 4 2% | 1 3% | 4 5% | 2 2% | 3 3% | 1 1% | 6 9% | |
| Mean score | 4.32 | 4.38 b | 4.21 | 4.35 | 4.29 | 4.20 | 4.37 a | 4.37 | 4.35 | 4.24 | 4.31 | 4.37 | 4.39 d | 4.44 | 4.29 | 4.22 | 4.24 | 4.40 | 4.38 | 4.22 | 4.30 | 4.19 | |
| Standard deviation | .76 | .74 | .80 | .73 | .80 | .78 | .69 | .78 | .79 | .81 | .74 | .76 | .71 | .73 | .76 | .75 | .76 | .84 | .74 | .76 | .71 | .93 | |
| Standard error | .03 | .04 | .06 | .04 | .05 | .06 | .06 | .07 | .06 | .09 | .05 | .05 | .04 | .12 | .13 | .06 | .12 | .09 | .07 | .07 | .09 | .11 | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_SUM. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

SUMMARY TABLE

Base: All respondents

| | | | | | | NETS | |
|--|-------------|------------------|-------------------------|------------------------|-----------------------|------------|------|
| | Total | Highest priority | Second highest priority | Third highest priority | Not selected in top 3 | Top 3 | Mean |
| Developing and guiding policy and procedure (creating best practice) | 617 100% | 105 17% | 111 18% | 89 14% | 312 51% | 305 49% | 1.95 |
| Process management | 617 100% | 85 14% | 82 13% | 109 18% | 341 55% | 276 45% | 2.09 |
| Laws and regulation | 617 100% | 121 20% | 81 13% | 59 10% | 356 58% | 261 42% | 1.76 |
| Data management | 617 100% | 64 10% | 85 14% | 77 12% | 391 63% | 226 37% | 2.06 |
| Vendor management | 617 100% | 87 14% | 72 12% | 61 10% | 397 64% | 220 36% | 1.88 |
| Monitoring supplier performance | 617 100% | 51 8% | 57 9% | 78 13% | 431 70% | 186 30% | 2.15 |
| Market research and analysis | 617 100% | 40 6% | 42 7% | 45 7% | 490 79% | 127 21% | 2.04 |
| Supplier spend analysis | 617 100% | 29 5% | 49 8% | 41 7% | 498 81% | 119 19% | 2.10 |
| Generating internal buy-in | 617 100% | 25 4% | 31 5% | 42 7% | 519 84% | 98 16% | 2.17 |
| Other | 617 100% | 10 2% | 2 * | 1 * | 604 98% | 13 2% | 1.31 |

Compliance and Procurement Sentiment - Wave 2

Q3_TOP3. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

TOP 3 SUMMARY

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Developing and guiding policy and procedure (creating best practice) | 305 49% | 205 50% | 100 48% | 179 58% | 126 41% | 80 51% | 70 48% | 44 40% | 110 54% | 37 43% | 112 50% | 137 50% | 185 49% | 17 47% | 18 53% | 94 51% | 19 51% | 45 52% | 52 50% | 41 39% | 31 45% | 44 65% |
| Process management | 276 45% | 186 46% | 90 43% | 137 44% | 139 45% | 77 49% | 66 45% | 40 37% | 92 45% | 46 53% | 96 43% | 121 44% | 175 47% | 10 28% | 13 38% | 93 50% | 19 51% | 30 34% | 52 50% | 42 40% | 30 43% | 29 43% |
| Laws and regulation | 261 42% | 161 40% | 100 48% | 180 58% | 81 26% | 68 43% | 63 43% | 37 34% | 92 45% | 38 44% | 94 42% | 111 40% | 154 41% | 11 31% | 8 24% | 80 43% | 13 35% | 40 46% | 55 53% | 32 30% | 19 28% | 34 50% |
| Data management | 226 37% | 152 37% | 74 35% | 139 45% | 87 28% | 55 35% | 55 38% | 46 42% | 70 34% | 26 30% | 93 41% | 96 35% | 142 38% | 13 36% | 11 32% | 59 32% | 10 27% | 33 38% | 36 35% | 31 30% | 35 51% | 24 35% |
| Vendor management | 220 36% | 164 40% | 56 27% | 67 22% | 153 50% | 54 34% | 54 37% | 42 39% | 70 34% | 30 34% | 70 31% | 115 42% | 154 41% | 15 42% | 13 38% | 46 25% | 12 32% | 30 34% | 25 24% | 50 48% | 27 39% | 19 28% |
| Monitoring supplier performance | 186 30% | 120 29% | 66 31% | 64 21% | 122 39% | 42 27% | 51 35% | 42 39% | 51 25% | 26 30% | 67 30% | 87 32% | 106 28% | 15 42% | 9 26% | 54 29% | 16 43% | 29 33% | 26 25% | 53 50% | 23 33% | 17 25% |
| Market research and analysis | 127 21% | 85 21% | 42 20% | 55 18% | 72 23% | 41 26% | 31 21% | 24 22% | 31 15% | 27 31% | 52 23% | 43 16% | 78 21% | 7 19% | 8 24% | 37 20% | 9 24% | 18 21% | 23 22% | 17 16% | 21 30% | 10 15% |
| Supplier spend analysis | 119 19% | 74 18% | 45 21% | 31 10% | 88 28% | 25 16% | 32 22% | 26 24% | 36 18% | 15 17% | 51 23% | 47 17% | 68 18% | 11 31% | 11 32% | 39 21% | 8 22% | 20 23% | 15 14% | 32 30% | 15 22% | 12 18% |
| Generating internal buy-in | 98 16% | 54 13% | 44 21% | 51 17% | 47 15% | 23 15% | 12 8% | 22 20% | 41 20% | 10 11% | 34 15% | 51 18% | 51 14% | 8 22% | 10 29% | 41 22% | 5 14% | 15 17% | 19 18% | 13 12% | 6 9% | 11 16% |
| Other | 13 2% | 5 1% | 8 4% | 7 2% | 6 2% | 5 3% | 1 1% | 1 1% | 6 3% | 2 2% | 2 1% | 9 3% | 5 1% | - | - | 6 3% | - | - | 4 4% | 2 2% | - | 1 1% |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q3_1. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Generating internal buy-in

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Highest priority | (1.0) | 25 | 17 | 8 | 10 | 15 | 5 | 5 | 3 | 12 | 4 | 7 | 12 | 14 | 1 | 2 | 8 | - | 4 | 4 | 4 | 2 | 1 |
| | | 4% | 4% | 4% | 3% | 5% | 3% | 3% | 3% | 6% | 5% | 3% | 4% | 4% | 3% | 6% | 4% | - | 5% | 4% | 4% | 3% | 1% |
| Second highest priority | (2.0) | 31 | 12 | 19 | 18 | 13 | 6 | 2 | 13 | 10 | 2 | 13 | 16 | 13 | 4 | 3 | 19 | 2 | 3 | 9 | 3 | - | 4 |
| | | 5% | 3% | 9% | 6% | 4% | 4% | 1% | 12% | 5% | 2% | 6% | 6% | 3% | 11% | 9% | 10% | 5% | 3% | 9% | 3% | - | 6% |
| | | | | a | | | | | abd | | | | | | a | | a | | | c | | | c |
| Third highest priority | (3.0) | 42 | 25 | 17 | 23 | 19 | 12 | 5 | 6 | 19 | 4 | 14 | 23 | 24 | 3 | 5 | 14 | 3 | 8 | 6 | 6 | 4 | 6 |
| | | 7% | 6% | 8% | 7% | 6% | 8% | 3% | 6% | 9% | 5% | 6% | 8% | 6% | 8% | 15% | 8% | 8% | 9% | 6% | 6% | 6% | 9% |
| | | | | | | | | | b | | | | | | | | | | | | | | |
| Not selected in top 3 | | 519 | 353 | 166 | 257 | 262 | 135 | 134 | 87 | 162 | 77 | 191 | 225 | 325 | 28 | 24 | 144 | 32 | 72 | 85 | 92 | 63 | 57 |
| | | 84% | 87% | 79% | 83% | 85% | 85% | 92% | 80% | 80% | 89% | 85% | 82% | 86% | 78% | 71% | 78% | 86% | 83% | 82% | 88% | 91% | 84% |
| | | | b | | | | | cd | | | | | cd | | | | | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | | 98 | 54 | 44 | 51 | 47 | 23 | 12 | 22 | 41 | 10 | 34 | 51 | 51 | 8 | 10 | 41 | 5 | 15 | 19 | 13 | 6 | 11 |
| | | 16% | 13% | 21% | 17% | 15% | 15% | 8% | 20% | 20% | 11% | 15% | 18% | 14% | 22% | 29% | 22% | 14% | 17% | 18% | 12% | 9% | 16% |
| | | | a | | | | | | b | b | | | | | a | a | | | | | | | |
| Mean score | | 2.17 | 2.15 | 2.20 | 2.25 | 2.09 | 2.30 | 2.00 | 2.14 | 2.17 | 2.00 | 2.21 | 2.22 | 2.20 | 2.25 | 2.30 | 2.15 | 2.60 | 2.27 | 2.11 | 2.15 | 2.33 | 2.45 |
| Standard deviation | | .81 | .88 | .73 | .77 | .86 | .82 | .95 | .64 | .86 | .94 | .77 | .81 | .85 | .71 | .82 | .73 | .55 | .88 | .74 | .90 | 1.03 | .69 |
| Standard error | | .08 | .12 | .11 | .11 | .12 | .17 | .28 | .14 | .13 | .30 | .13 | .11 | .12 | .25 | .26 | .11 | .24 | .23 | .17 | .25 | .42 | .21 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q3_2. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Laws and regulation

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Highest priority | (1.0) | 121 | 76 | 45 | 93 | 28 | 25 | 22 | 23 | 50 | 10 | 40 | 63 | 74 | 4 | - | 35 | 4 | 20 | 31 | 14 | 8 | 15 |
| | | 20% | 19% | 21% | 30% | 9% | 16% | 15% | 21% | 25% | 11% | 18% | 23% | 20% | 11% | - | 19% | 11% | 23% | 30% | 13% | 12% | 22% |
| | | | | | b | | | | ab | | | a | c | c | | c | | c | bc | | | | |
| Second highest priority | (2.0) | 81 | 48 | 33 | 50 | 31 | 22 | 25 | 7 | 27 | 16 | 31 | 27 | 44 | 2 | 4 | 26 | 4 | 11 | 19 | 10 | 6 | 12 |
| | | 13% | 12% | 16% | 16% | 10% | 14% | 17% | 6% | 13% | 18% | 14% | 10% | 12% | 6% | 12% | 14% | 11% | 13% | 18% | 10% | 9% | 18% |
| | | | | | b | | | c | | | c | | | | | | | | | | | | |
| Third highest priority | (3.0) | 59 | 37 | 22 | 37 | 22 | 21 | 16 | 7 | 15 | 12 | 23 | 21 | 36 | 5 | 4 | 19 | 5 | 9 | 5 | 8 | 5 | 7 |
| | | 10% | 9% | 10% | 12% | 7% | 13% | 11% | 6% | 7% | 14% | 10% | 8% | 10% | 14% | 12% | 10% | 14% | 10% | 5% | 8% | 7% | 10% |
| | | | | | b | | | | | | | | | | | | | | | | | | |
| Not selected in top 3 | | 356 | 246 | 110 | 128 | 228 | 90 | 83 | 72 | 111 | 49 | 131 | 165 | 222 | 25 | 26 | 105 | 24 | 47 | 49 | 73 | 50 | 34 |
| | | 58% | 60% | 52% | 42% | 74% | 57% | 57% | 66% | 55% | 56% | 58% | 60% | 59% | 69% | 76% | 57% | 65% | 54% | 47% | 70% | 72% | 50% |
| | | | | | a | | | | | | | | | | adf | | | | | ad | | ad | |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | | 261 | 161 | 100 | 180 | 81 | 68 | 63 | 37 | 92 | 38 | 94 | 111 | 154 | 11 | 8 | 80 | 13 | 40 | 55 | 32 | 19 | 34 |
| | | 42% | 40% | 48% | 58% | 26% | 43% | 43% | 34% | 45% | 44% | 42% | 40% | 41% | 31% | 24% | 43% | 35% | 46% | 53% | 30% | 28% | 50% |
| | | | | | b | | | | | | | | c | | | c | | c | bc | | | | bc |
| Mean score | | 1.76 | 1.76 | 1.77 | 1.69 | 1.93 | 1.94 | 1.90 | 1.57 | 1.62 | 2.05 | 1.82 | 1.62 | 1.75 | 2.09 | 2.50 | 1.80 | 2.08 | 1.73 | 1.53 | 1.81 | 1.84 | 1.76 |
| | | | | | a | | cd | cd | | | c | | | | | | | | | | | | |
| Standard deviation | | .80 | .80 | .79 | .79 | .79 | .83 | .78 | .80 | .75 | .77 | .80 | .79 | .81 | .94 | .53 | .80 | .86 | .82 | .66 | .82 | .83 | .78 |
| Standard error | | .05 | .06 | .08 | .06 | .09 | .10 | .10 | .13 | .08 | .12 | .08 | .07 | .07 | .28 | .19 | .09 | .24 | .13 | .09 | .15 | .19 | .13 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_3. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Market research and analysis

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|-------------------------------|-------------|-------------|-------------|----------------|-----------------|---------------|-------------|-------------|-----------------------|-------------------------|---|-----------------------------|---------------------|---|---|---------------------------------|---|------------|-----------------------|-------------------|------------|----------------------------|
| | Total | USA | UK | Comp liance | Procu rement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/ \$1 million | Between £/\$1 million and £/\$10 million | Above £/ \$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia- Pacific (including Russia) | Global | Financial Services | Manu facturing | Retail | Govern ment agencies |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Highest priority (1.0) | 40 6% | 25 6% | 15 7% | 15 5% | 25 8% | 16 10% | 9 6% | 3 3% | 12 6% | 9 10% | 16 7% | 12 4% | 22 6% | 2 6% | 3 9% | 12 6% | - - | 5 6% | 6 6% | 5 5% | 5 7% | 5 7% |
| Second highest priority (2.0) | 42 7% | 29 7% | 13 6% | 21 7% | 21 7% | 12 8% | 10 7% | 12 11% | 8 4% | 8 9% | 20 9% | 13 5% | 26 7% | 3 8% | 3 9% | 13 7% | 5 14% | 8 9% | 5 5% | 5 5% | 9 13% | 2 3% |
| Third highest priority (3.0) | 45 7% | 31 8% | 14 7% | 19 6% | 26 8% | 13 8% | 12 8% | 9 8% | 11 5% | 10 11% | 16 7% | 18 7% | 30 8% | 2 6% | 2 6% | 12 6% | 4 11% | 5 6% | 12 12% | 7 7% | 7 10% | 3 4% |
| Not selected in top 3 | 490 79% | 322 79% | 168 80% | 253 82% | 237 77% | 117 74% | 115 79% | 85 78% | 172 85% | 60 69% | 173 77% | 233 84% | 298 79% | 29 81% | 26 76% | 148 80% | 28 76% | 69 79% | 81 78% | 88 84% | 48 70% | 58 85% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | 127 21% | 85 21% | 42 20% | 55 18% | 72 23% | 41 26% | 31 21% | 24 22% | 31 15% | 27 31% | 52 23% | 43 16% | 78 21% | 7 19% | 8 24% | 37 20% | 9 24% | 18 21% | 23 22% | 17 16% | 21 30% | 10 15% |
| Mean score | 2.04 | 2.07 | 1.98 | 2.07 | 2.01 | 1.93 | 2.10 | 2.25 | 1.97 | 2.04 | 2.00 | 2.14 | 2.10 | 2.00 | 1.88 | 2.00 | 2.44 | 2.00 | 2.26 | 2.12 | 2.10 | 1.80 |
| Standard deviation | .82 | .81 | .84 | .79 | .85 | .85 | .83 | .68 | .87 | .85 | .79 | .83 | .82 | .82 | .83 | .82 | .53 | .77 | .86 | .86 | .77 | .92 |
| Standard error | .07 | .09 | .13 | .11 | .10 | .13 | .15 | .14 | .16 | .16 | .11 | .13 | .09 | .31 | .30 | .13 | .18 | .18 | .18 | .21 | .17 | .29 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_4. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Vendor management

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Highest priority | 87 | 58 | 29 | 18 | 69 | 14 | 21 | 21 | 31 | 6 | 19 | 62 | 60 | 8 | 7 | 21 | 8 | 14 | 11 | 25 | 12 | 9 |
| | 14% | 14% | 14% | 6% | 22% | 9% | 14% | 19% | 15% | 7% | 8% | 22% | 16% | 22% | 21% | 11% | 22% | 16% | 11% | 24% | 17% | 13% |
| | | | | a | a | | | a | | | ab | | | | | | | | a | | | |
| Second highest priority | 72 | 56 | 16 | 26 | 46 | 22 | 18 | 11 | 21 | 16 | 25 | 28 | 51 | 4 | 5 | 17 | 3 | 6 | 5 | 14 | 11 | 6 |
| | 12% | 14% | 8% | 8% | 15% | 14% | 12% | 10% | 10% | 18% | 11% | 10% | 14% | 11% | 15% | 9% | 8% | 7% | 5% | 13% | 16% | 9% |
| | | b | | a | a | | | | | c | | | | | | | | | a | a | | |
| Third highest priority | 61 | 50 | 11 | 23 | 38 | 18 | 15 | 10 | 18 | 8 | 26 | 25 | 43 | 3 | 1 | 8 | 1 | 10 | 9 | 11 | 4 | 4 |
| | 10% | 12% | 5% | 7% | 12% | 11% | 10% | 9% | 9% | 9% | 12% | 9% | 11% | 8% | 3% | 4% | 3% | 11% | 9% | 10% | 6% | 6% |
| | | b | | a | a | | | | | | | | d | | | | d | | | | | |
| Not selected in top 3 | 397 | 243 | 154 | 241 | 156 | 104 | 92 | 67 | 133 | 57 | 155 | 161 | 222 | 21 | 21 | 139 | 25 | 57 | 79 | 55 | 42 | 49 |
| | 64% | 60% | 73% | 78% | 50% | 66% | 63% | 61% | 66% | 66% | 69% | 58% | 59% | 58% | 62% | 75% | 68% | 66% | 76% | 52% | 61% | 72% |
| | | a | | b | | | | | | | c | | | | ab | | | | bc | | | b |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | 220 | 164 | 56 | 67 | 153 | 54 | 54 | 42 | 70 | 30 | 70 | 115 | 154 | 15 | 13 | 46 | 12 | 30 | 25 | 50 | 27 | 19 |
| | 36% | 40% | 27% | 22% | 50% | 34% | 37% | 39% | 34% | 34% | 31% | 42% | 41% | 42% | 38% | 25% | 32% | 34% | 24% | 48% | 39% | 28% |
| | | b | | a | a | | | | | | b | | d | d | | | | | ad | a | | |
| Mean score | 1.88 | 1.95 | 1.68 | 2.07 | 1.80 | 2.07 | 1.89 | 1.74 | 1.81 | 2.07 | 2.10 | 1.68 | 1.89 | 1.67 | 1.54 | 1.72 | 1.42 | 1.87 | 1.92 | 1.72 | 1.70 | 1.74 |
| | | b | | b | | c | | | | c | c | | | | | | | | | | | |
| Standard deviation | .81 | .81 | .79 | .78 | .81 | .77 | .82 | .83 | .82 | .69 | .80 | .81 | .81 | .82 | .66 | .75 | .67 | .90 | .91 | .81 | .72 | .81 |
| Standard error | .05 | .06 | .11 | .10 | .07 | .11 | .11 | .13 | .10 | .13 | .10 | .08 | .07 | .21 | .18 | .11 | .19 | .16 | .18 | .11 | .14 | .18 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_5. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Process management

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|---|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Highest priority | (1.0) | 85 | 59 | 26 | 33 | 52 | 26 | 22 | 13 | 24 | 19 | 31 | 31 | 51 | 2 | 3 | 25 | 4 | 13 | 13 | 12 | 11 | 8 |
| | | 14% | 14% | 12% | 11% | 17% | 16% | 15% | 12% | 12% | 22% | 14% | 11% | 14% | 6% | 9% | 14% | 11% | 15% | 13% | 11% | 16% | 12% |
| | | | | | a | | | | | c | | | | | | | | | | | | | |
| Second highest priority | (2.0) | 82 | 62 | 20 | 39 | 43 | 17 | 21 | 16 | 27 | 9 | 26 | 45 | 61 | 4 | 7 | 24 | 7 | 5 | 15 | 14 | 8 | 10 |
| | | 13% | 15% | 10% | 13% | 14% | 11% | 14% | 15% | 13% | 10% | 12% | 16% | 16% | 11% | 21% | 13% | 19% | 6% | 14% | 13% | 12% | 15% |
| | | | b | | | | | | | | | | f | | f | | f | | | | | | |
| Third highest priority | (3.0) | 109 | 65 | 44 | 65 | 44 | 34 | 23 | 11 | 41 | 18 | 39 | 45 | 63 | 4 | 3 | 44 | 8 | 12 | 24 | 16 | 11 | 11 |
| | | 18% | 16% | 21% | 21% | 14% | 22% | 16% | 10% | 20% | 21% | 17% | 16% | 17% | 11% | 9% | 24% | 22% | 14% | 23% | 15% | 16% | 16% |
| | | | | | b | | c | | c | | | | | | | a | | | | | | | |
| Not selected in top 3 | | 341 | 221 | 120 | 171 | 170 | 81 | 80 | 69 | 111 | 41 | 129 | 155 | 201 | 26 | 21 | 92 | 18 | 57 | 52 | 63 | 39 | 39 |
| | | 55% | 54% | 57% | 56% | 55% | 51% | 55% | 63% | 55% | 47% | 57% | 56% | 53% | 72% | 62% | 50% | 49% | 66% | 50% | 60% | 57% | 57% |
| | | | | | ade | | | | | | | | | ade | | | ad | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | | 276 | 186 | 90 | 137 | 139 | 77 | 66 | 40 | 92 | 46 | 96 | 121 | 175 | 10 | 13 | 93 | 19 | 30 | 52 | 42 | 30 | 29 |
| | | 45% | 46% | 43% | 44% | 45% | 49% | 45% | 37% | 45% | 53% | 43% | 44% | 47% | 28% | 38% | 50% | 51% | 34% | 50% | 40% | 43% | 43% |
| | | | | | | | | | | | | | | bf | | bf | b | | | | | | |
| Mean score | | 2.09 | 2.03 | 2.20 | 2.23 | 1.94 | 2.10 | 2.02 | 1.95 | 2.18 | 1.98 | 2.08 | 2.12 | 2.07 | 2.20 | 2.00 | 2.20 | 2.21 | 1.97 | 2.21 | 2.10 | 2.00 | 2.10 |
| | | | | | b | | | | | | | | | | | | | | | | | | |
| Standard deviation | | .84 | .82 | .86 | .82 | .83 | .88 | .83 | .78 | .82 | .91 | .85 | .79 | .81 | .79 | .71 | .84 | .79 | .93 | .82 | .82 | .87 | .82 |
| Standard error | | .05 | .06 | .09 | .07 | .07 | .10 | .10 | .12 | .09 | .13 | .09 | .07 | .06 | .25 | .20 | .09 | .18 | .17 | .11 | .13 | .16 | .15 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_6. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Data management

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------------|-------------|-------------|-------------|-----------------|-----------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|----------------|-----------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Highest priority (1.0) | 64 10% | 48 12% | 16 8% | 40 13% b | 24 8% | 18 11% | 11 8% | 14 13% | 21 10% | 4 5% | 35 16% ac | 23 8% | 44 12% | 7 19% d | 3 9% | 15 8% | 3 8% | 10 11% | 8 8% | 9 9% | 11 16% d | 2 3% |
| Second highest priority (2.0) | 85 14% | 54 13% | 31 15% | 51 17% b | 34 11% | 21 13% | 23 16% | 13 12% | 28 14% | 13 15% | 31 14% | 37 13% | 51 14% | 4 11% | 4 12% | 21 11% | 4 11% | 13 15% | 15 14% | 10 10% | 12 17% | 9 13% |
| Third highest priority (3.0) | 77 12% | 50 12% | 27 13% | 48 16% b | 29 9% | 16 10% | 21 14% | 19 17% | 21 10% | 9 10% | 27 12% | 36 13% | 47 13% | 2 6% | 4 12% | 23 12% | 3 8% | 10 11% | 13 13% | 12 11% | 12 17% | 13 19% |
| Not selected in top 3 | 391 63% | 255 63% | 136 65% | 169 55% | 222 72% a | 103 65% | 91 62% | 63 58% | 133 66% | 61 70% | 132 59% | 180 65% | 234 62% | 23 64% | 23 68% | 126 68% | 27 73% | 54 62% | 68 65% c | 74 70% c | 34 49% | 44 65% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | 226 37% | 152 37% | 74 35% | 139 45% b | 87 28% | 55 35% | 55 38% | 46 42% | 70 34% | 26 30% | 93 41% | 96 35% | 142 38% | 13 36% | 11 32% | 59 32% | 10 27% | 33 38% | 36 35% | 31 30% | 35 51% ab | 24 35% |
| Mean score | 2.06 | 2.01 | 2.15 | 2.06 | 2.06 | 1.96 | 2.18 | 2.11 | 2.00 | 2.19 | 1.91 | 2.14 | 2.02 | 1.62 | 2.09 | 2.14 | 2.00 | 2.00 | 2.14 | 2.10 | 2.03 | 2.46 |
| Standard deviation | .79 | .81 | .75 | .80 | .78 | .79 | .75 | .85 | .78 | .69 | .82 | .78 | .80 | .77 | .83 | .80 | .82 | .79 | .76 | .83 | .82 | .66 |
| Standard error | .05 | .07 | .09 | .07 | .08 | .11 | .10 | .13 | .09 | .14 | .08 | .08 | .07 | .21 | .25 | .10 | .26 | .14 | .13 | .15 | .14 | .13 |

Columns Tested: a.b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_7. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Developing and guiding policy and procedure (creating best practice)

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|---------------------|-------------|-------------|-----------------|-----------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|----------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Highest priority | (1.0) 105 17% | 70 17% | 35 17% | 63 20% | 42 14% | 32 20% | 29 20% | 12 11% | 32 16% | 19 22% | 39 17% | 38 14% | 64 17% | 5 14% | 5 15% | 39 21% | 8 22% | 11 13% | 18 17% | 15 14% | 10 14% | 18 26% b |
| Second highest priority | (2.0) 111 18% | 75 18% | 36 17% | 70 23% | 41 13% | 32 20% | 20 14% | 13 12% | 46 23% bc | 10 11% | 39 17% | 54 20% | 65 17% | 5 14% | 5 15% | 31 17% | 5 14% | 23 26% | 19 18% | 20 19% | 10 14% | 15 22% |
| Third highest priority | (3.0) 89 14% | 60 15% | 29 14% | 46 15% | 43 14% | 16 10% | 21 14% | 19 17% | 32 16% | 8 9% | 34 15% | 45 16% | 56 15% | 7 19% | 8 24% | 24 13% | 6 16% | 11 13% | 15 14% | 6 6% | 11 16% b | 11 16% b |
| Not selected in top 3 | 312 51% | 202 50% | 110 52% | 129 42% | 183 59% a | 78 49% | 76 52% | 65 60% | 93 46% d | 50 57% | 113 50% | 139 50% | 191 51% | 19 53% | 16 47% | 91 49% | 18 49% | 42 48% | 52 50% | 64 61% | 38 55% d | 24 35% d |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | 305 49% | 205 50% | 100 48% | 179 58% b | 126 41% | 80 51% | 70 48% | 44 40% | 110 54% c | 37 43% | 112 50% | 137 50% | 185 49% | 17 47% | 18 53% | 94 51% | 19 51% | 45 52% | 52 50% | 41 39% | 31 45% | 44 65% bc |
| Mean score | 1.95 | 1.95 | 1.94 | 1.91 | 2.01 | 1.80 | 1.89 | 2.16 a | 2.00 | 1.70 | 1.96 | 2.05 a | 1.96 | 2.12 | 2.17 | 1.84 | 1.89 | 2.00 | 1.94 | 1.78 | 2.03 | 1.84 |
| Standard deviation | .80 | .80 | .80 | .78 | .82 | .75 | .84 | .83 | .77 | .81 | .81 | .78 | .81 | .86 | .86 | .81 | .88 | .71 | .80 | .69 | .84 | .81 |
| Standard error | .05 | .06 | .08 | .06 | .07 | .08 | .10 | .13 | .07 | .13 | .08 | .07 | .06 | .21 | .20 | .08 | .20 | .11 | .11 | .11 | .15 | .12 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_8. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Monitoring supplier performance

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|---|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Highest priority | (1.0) | 51 | 31 | 20 | 22 | 29 | 12 | 15 | 13 | 11 | 9 | 22 | 20 | 28 | 4 | 4 | 16 | 6 | 7 | 9 | 12 | 5 | 6 |
| | | 8% | 8% | 10% | 7% | 9% | 8% | 10% | 12% | 5% | 10% | 10% | 7% | 7% | 11% | 12% | 9% | 16% | 8% | 9% | 11% | 7% | 9% |
| Second highest priority | (2.0) | 57 | 39 | 18 | 19 | 38 | 15 | 16 | 11 | 15 | 7 | 21 | 26 | 37 | 6 | 2 | 16 | 5 | 7 | 9 | 15 | 8 | 4 |
| | | 9% | 10% | 9% | 6% | 12% | 9% | 11% | 10% | 7% | 8% | 9% | 9% | 10% | 17% | 6% | 9% | 14% | 8% | 9% | 14% | 12% | 6% |
| Third highest priority | (3.0) | 78 | 50 | 28 | 23 | 55 | 15 | 20 | 18 | 25 | 10 | 24 | 41 | 41 | 5 | 3 | 22 | 5 | 15 | 8 | 26 | 10 | 7 |
| | | 13% | 12% | 13% | 7% | 18% | 9% | 14% | 17% | 12% | 11% | 11% | 15% | 11% | 14% | 9% | 12% | 14% | 17% | 8% | 25% | 14% | 10% |
| Not selected in top 3 | | 431 | 287 | 144 | 244 | 187 | 116 | 95 | 67 | 152 | 61 | 158 | 189 | 270 | 21 | 25 | 131 | 21 | 58 | 78 | 52 | 46 | 51 |
| | | 70% | 71% | 69% | 79% | 61% | 73% | 65% | 61% | 75% | 70% | 70% | 68% | 72% | 58% | 74% | 71% | 57% | 67% | 75% | 50% | 67% | 75% |
| | | | | | b | | c | | bc | | | | | | | | | | b | | b | b | |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | | 186 | 120 | 66 | 64 | 122 | 42 | 51 | 42 | 51 | 26 | 67 | 87 | 106 | 15 | 9 | 54 | 16 | 29 | 26 | 53 | 23 | 17 |
| | | 30% | 29% | 31% | 21% | 39% | 27% | 35% | 39% | 25% | 30% | 30% | 32% | 28% | 42% | 26% | 29% | 43% | 33% | 25% | 50% | 33% | 25% |
| | | | | | a | | d | | ad | | | | | | | | | | acd | | | | |
| Mean score | | 2.15 | 2.16 | 2.12 | 2.02 | 2.21 | 2.07 | 2.10 | 2.12 | 2.27 | 2.04 | 2.03 | 2.24 | 2.12 | 2.07 | 1.89 | 2.11 | 1.94 | 2.28 | 1.96 | 2.26 | 2.22 | 2.06 |
| Standard deviation | | .82 | .81 | .85 | .85 | .81 | .81 | .83 | .86 | .80 | .87 | .83 | .81 | .80 | .80 | .93 | .84 | .85 | .84 | .82 | .81 | .80 | .90 |
| Standard error | | .06 | .07 | .10 | .11 | .07 | .12 | .12 | .13 | .11 | .17 | .10 | .09 | .08 | .21 | .31 | .11 | .21 | .16 | .16 | .11 | .17 | .22 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_9. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Supplier spend analysis

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Highest priority | (1.0) | 29 | 20 | 9 | 8 | 21 | 6 | 11 | 7 | 5 | 5 | 15 | 8 | 16 | 3 | 7 | 9 | 4 | 3 | 2 | 7 | 5 | 3 |
| | | 5% | 5% | 4% | 3% | 7% | 4% | 8% | 6% | 2% | 6% | 7% | 3% | 4% | 8% | 21% | 5% | 11% | 3% | 2% | 7% | 7% | 4% |
| | | | | | a | | d | | | | c | | | | adf | | | | | | | | |
| Second highest priority | (2.0) | 49 | 28 | 21 | 10 | 39 | 9 | 10 | 12 | 18 | 5 | 17 | 26 | 25 | 4 | 1 | 15 | 2 | 11 | 6 | 13 | 5 | 5 |
| | | 8% | 7% | 10% | 3% | 13% | 6% | 7% | 11% | 9% | 6% | 8% | 9% | 7% | 11% | 3% | 8% | 5% | 13% | 6% | 12% | 7% | 7% |
| | | | | | a | | | | | | | | | | | | | | | | | | |
| Third highest priority | (3.0) | 41 | 26 | 15 | 13 | 28 | 10 | 11 | 7 | 13 | 5 | 19 | 13 | 27 | 4 | 3 | 15 | 2 | 6 | 7 | 12 | 5 | 4 |
| | | 7% | 6% | 7% | 4% | 9% | 6% | 8% | 6% | 6% | 6% | 8% | 5% | 7% | 11% | 9% | 8% | 5% | 7% | 7% | 11% | 7% | 6% |
| | | | | | a | | | | | | | | | | | | | | | | | | |
| Not selected in top 3 | | 498 | 333 | 165 | 277 | 221 | 133 | 114 | 83 | 167 | 72 | 174 | 229 | 308 | 25 | 23 | 146 | 29 | 67 | 89 | 73 | 54 | 56 |
| | | 81% | 82% | 79% | 90% | 72% | 84% | 78% | 76% | 82% | 83% | 77% | 83% | 82% | 69% | 68% | 79% | 78% | 77% | 86% | 70% | 78% | 82% |
| | | | | | b | | | | | | | | c | | | | | | b | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | | 119 | 74 | 45 | 31 | 88 | 25 | 32 | 26 | 36 | 15 | 51 | 47 | 68 | 11 | 11 | 39 | 8 | 20 | 15 | 32 | 15 | 12 |
| | | 19% | 18% | 21% | 10% | 28% | 16% | 22% | 24% | 18% | 17% | 23% | 17% | 18% | 31% | 32% | 21% | 22% | 23% | 14% | 30% | 22% | 18% |
| | | | | | a | | | | | | | | | | a | | | | a | | | | |
| Mean score | | 2.10 | 2.08 | 2.13 | 2.16 | 2.08 | 2.16 | 2.00 | 2.00 | 2.22 | 2.00 | 2.08 | 2.11 | 2.16 | 2.09 | 1.64 | 2.15 | 1.75 | 2.15 | 2.33 | 2.16 | 2.00 | 2.08 |
| Standard deviation | | .76 | .79 | .73 | .82 | .75 | .80 | .84 | .75 | .68 | .85 | .82 | .67 | .78 | .83 | .92 | .78 | .89 | .67 | .72 | .77 | .85 | .79 |
| Standard error | | .07 | .09 | .11 | .15 | .08 | .16 | .15 | .15 | .11 | .22 | .11 | .10 | .10 | .25 | .28 | .12 | .31 | .15 | .19 | .14 | .22 | .23 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q3_10. Please rank your top 3 options from the following in order of priority for you in your role, where 1 = highest priority, 2 = second highest priority and so on.

Other

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|-------------------|-------------|--------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Highest priority | (1.0) 10 2% | 3 1% | 7 3% a | 6 2% | 4 1% | 4 3% | 1 1% | - - | 5 2% | 2 2% | 1 * | 7 3% | 3 1% | - - | - - | 5 3% | - - | - - | 2 2% | 2 2% | - - | 1 1% |
| Second highest priority | (2.0) 2 * | 1 * | 1 * | - - | 2 1% | 1 1% | - - | - - | 1 * | - - | 1 * | 1 * | 1 * | - - | - - | 1 1% | - - | - - | 1 1% | - - | - - | - - |
| Third highest priority | (3.0) 1 * | 1 * | - - | 1 * | - - | - - | - - | 1 1% | - - | - - | - - | 1 * | 1 * | - - | - - | - - | - - | - - | 1 1% | - - | - - | - - |
| Not selected in top 3 | 604 98% | 402 99% | 202 96% | 301 98% | 303 98% | 153 97% | 145 99% | 108 99% | 197 97% | 85 98% | 223 99% | 267 97% | 371 99% | 36 100% | 34 100% | 179 97% | 37 100% | 87 100% | 100 96% | 103 98% | 69 100% | 67 99% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Top 3 | 13 2% | 5 1% | 8 4% a | 7 2% | 6 2% | 5 3% | 1 1% | 1 1% | 6 3% | 2 2% | 2 1% | 9 3% | 5 1% | - - | - - | 6 3% | - - | - - | 4 4% | 2 2% | - - | 1 1% |
| Mean score | 1.31 | 1.60 | 1.13 | 1.29 | 1.33 | 1.20 | 1.00 | 3.00 | 1.17 | 1.00 | 1.50 | 1.33 | 1.60 | - | - | 1.17 | - | - | 1.75 | 1.00 | - | 1.00 |
| Standard deviation | .63 | .89 | .35 | .76 | .52 | .45 | - | - | .41 | - | .71 | .71 | .89 | - | - | .41 | - | - | .96 | - | - | - |
| Standard error | .17 | .40 | .13 | .29 | .21 | .20 | - | - | .17 | - | .50 | .24 | .40 | - | - | .17 | - | - | .48 | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q4. To what extent would you say that existing regulation has increased or decreased the risk to your business/ to the procurement process in your business in the last 3 months?

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Increased a lot (5.0) | 92 15% | 62 15% | 30 14% | 51 17% | 41 13% | 17 11% | 28 19% | 15 14% | 32 16% | 10 11% | 37 16% | 39 14% | 63 17% | 8 22% | 10 29% | 23 12% | 4 11% | 12 14% | 25 24% | 15 14% | 5 7% | 7 10% |
| Somewhat increased (4.0) | 224 36% | 132 32% | 92 44% | 113 37% | 111 36% | 49 31% | 44 30% | 54 50% | 77 38% | 25 29% | 85 38% | 106 38% | 123 33% | 15 42% | 16 47% | 75 41% | 16 43% | 43 49% | 38 37% | 43 41% | 28 41% | 23 34% |
| Stayed the same (3.0) | 251 41% | 178 44% | 73 35% | 117 38% | 134 43% | 81 51% | 61 42% | 33 30% | 75 37% | 48 55% | 80 36% | 112 41% | 158 42% | 8 22% | 6 18% | 69 37% | 12 32% | 26 30% | 31 30% | 40 38% | 33 48% | 28 41% |
| Somewhat decreased (2.0) | 36 6% | 24 6% | 12 6% | 18 6% | 18 6% | 8 5% | 10 7% | 4 4% | 14 7% | 1 1% | 20 9% | 13 5% | 23 6% | 4 11% | 1 3% | 14 8% | 4 11% | 3 3% | 8 8% | 6 6% | 3 4% | 6 9% |
| Decreased a lot (1.0) | 9 1% | 7 2% | 2 1% | 6 2% | 3 1% | 1 1% | 3 2% | 3 3% | 2 1% | 2 2% | 3 1% | 4 1% | 7 2% | 1 3% | 1 3% | 3 2% | 1 3% | 1 1% | 2 2% | 1 1% | - - | 2 3% |
| Don't know | 5 1% | 4 1% | 1 * | 3 1% | 2 1% | 2 1% | - - | - - | 3 1% | 1 1% | - - | 2 1% | 2 1% | - - | - - | 1 1% | - - | 2 2% | - - | - - | - - | 2 3% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Increased | 316 51% | 194 48% | 122 58% | 164 53% | 152 49% | 66 42% | 72 49% | 69 63% | 109 54% | 35 40% | 122 54% | 145 53% | 186 49% | 23 64% | 26 76% | 98 53% | 20 54% | 55 63% | 63 61% | 58 55% | 33 48% | 30 44% |
| Net: Decreased | 45 7% | 31 8% | 14 7% | 24 8% | 21 7% | 9 6% | 13 9% | 7 6% | 16 8% | 3 3% | 23 10% | 17 6% | 30 8% | 5 14% | 2 6% | 17 9% | 5 14% | 4 5% | 10 10% | 7 7% | 3 4% | 8 12% |
| Mean score | 3.58 | 3.54 | 3.65 | 3.61 | 3.55 | 3.47 | 3.58 | 3.68 | 3.62 | 3.47 | 3.59 | 3.59 | 3.57 | 3.69 | 3.97 | 3.55 | 3.49 | 3.73 | 3.73 | 3.62 | 3.51 | 3.41 |
| Standard deviation | .87 | .88 | .83 | .90 | .83 | .78 | .95 | .86 | .87 | .81 | .91 | .84 | .91 | 1.04 | .94 | .87 | .93 | .79 | .98 | .84 | .70 | .91 |
| Standard error | .04 | .04 | .06 | .05 | .05 | .06 | .08 | .08 | .06 | .09 | .06 | .05 | .05 | .17 | .16 | .06 | .15 | .09 | .10 | .08 | .08 | .11 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q4. To what extent would you say that existing regulation has increased or decreased the risk to your business/ to the procurement process in your business in the last 3 months?

Base: All respondents (excluding don't know)

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|-------------------------|----------|------|------|------------|-------------|---------------|--------|-----------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 612 | 403 | 209 | 305 | 307 | 156 | 146 | 109 | 200 | 86 | 225 | 274 | 374 | 36 | 34 | 184 | 37 | 85 | 104 | 105 | 69 | 66 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Increased a lot | 92 | 62 | 30 | 51 | 41 | 17 | 28 | 15 | 32 | 10 | 37 | 39 | 63 | 8 | 10 | 23 | 4 | 12 | 25 | 15 | 5 | 7 |
| | 15% | 15% | 14% | 17% | 13% | 11% | 19% | 14% | 16% | 12% | 16% | 14% | 17% | 22% | 29% | 13% | 11% | 14% | 24% | 14% | 7% | 11% |
| | | | | | | | a | | | | | | | | d | | | | cd | | | |
| Somewhat increased | 224 | 132 | 92 | 113 | 111 | 49 | 44 | 54 | 77 | 25 | 85 | 106 | 123 | 15 | 16 | 75 | 16 | 43 | 38 | 43 | 28 | 23 |
| | 37% | 33% | 44% | 37% | 36% | 31% | 30% | 50% | 39% | 29% | 38% | 39% | 33% | 42% | 47% | 41% | 43% | 51% | 37% | 41% | 41% | 35% |
| | | | a | | | | | ab | | | | | | | | | | a | | | | |
| Stayed the same | 251 | 178 | 73 | 117 | 134 | 81 | 61 | 33 | 75 | 48 | 80 | 112 | 158 | 8 | 6 | 69 | 12 | 26 | 31 | 40 | 33 | 28 |
| | 41% | 44% | 35% | 38% | 44% | 52% | 42% | 30% | 38% | 56% | 36% | 41% | 42% | 22% | 18% | 38% | 32% | 31% | 30% | 38% | 48% | 42% |
| | | | b | | | cd | | | | bc | | | bcd | | | c | | | | | a | |
| Somewhat decreased | 36 | 24 | 12 | 18 | 18 | 8 | 10 | 4 | 14 | 1 | 20 | 13 | 23 | 4 | 1 | 14 | 4 | 3 | 8 | 6 | 3 | 6 |
| | 6% | 6% | 6% | 6% | 6% | 5% | 7% | 4% | 7% | 1% | 9% | 5% | 6% | 11% | 3% | 8% | 11% | 4% | 8% | 6% | 4% | 9% |
| | | | | | | | | | | a | | | | | | | | | | | | |
| Decreased a lot | 9 | 7 | 2 | 6 | 3 | 1 | 3 | 3 | 2 | 2 | 3 | 4 | 7 | 1 | 1 | 3 | 1 | 1 | 2 | 1 | - | 2 |
| | 1% | 2% | 1% | 2% | 1% | 1% | 2% | 3% | 1% | 2% | 1% | 1% | 2% | 3% | 3% | 2% | 3% | 1% | 2% | 1% | - | 3% |
| | | | | | | | | | | | | | | | | | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Increased | 316 | 194 | 122 | 164 | 152 | 66 | 72 | 69 | 109 | 35 | 122 | 145 | 186 | 23 | 26 | 98 | 20 | 55 | 63 | 58 | 33 | 30 |
| | 52% | 48% | 58% | 54% | 50% | 42% | 49% | 63% | 55% | 41% | 54% | 53% | 50% | 64% | 76% | 53% | 54% | 65% | 61% | 55% | 48% | 45% |
| | | | a | | | | | ab | a | | a | a | | | ad | | | a | | | | |
| Net: Decreased | 45 | 31 | 14 | 24 | 21 | 9 | 13 | 7 | 16 | 3 | 23 | 17 | 30 | 5 | 2 | 17 | 5 | 4 | 10 | 7 | 3 | 8 |
| | 7% | 8% | 7% | 8% | 7% | 6% | 9% | 6% | 8% | 3% | 10% | 6% | 8% | 14% | 6% | 9% | 14% | 5% | 10% | 7% | 4% | 12% |
| | | | | | | | | | | | | | | | | | | | | | | |
| Mean score | 3.58 | 3.54 | 3.65 | 3.61 | 3.55 | 3.47 | 3.58 | 3.68 | 3.62 | 3.47 | 3.59 | 3.59 | 3.57 | 3.69 | 3.97 | 3.55 | 3.49 | 3.73 | 3.73 | 3.62 | 3.51 | 3.41 |
| | | | | | | | | a | | | | | | | ade | | | | d | | | |
| Standard deviation | .87 | .88 | .83 | .90 | .83 | .78 | .95 | .86 | .87 | .81 | .91 | .84 | .91 | 1.04 | .94 | .87 | .93 | .79 | .98 | .84 | .70 | .91 |
| Standard error | .04 | .04 | .06 | .05 | .05 | .06 | .08 | .08 | .06 | .09 | .06 | .05 | .05 | .17 | .16 | .06 | .15 | .09 | .10 | .08 | .08 | .11 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_SUM. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

SUMMARY TABLE

Base: All respondents

| | | | | | | | | NETS | | |
|---|-------------|----------------|------------------|------------|--------------------|----------------------|------------|------------|---------------|------|
| | Total | Very concerned | Fairly concerned | Neutral | Not very concerned | Not at all concerned | Don't know | Concerned | Not concerned | Mean |
| Customer/vendor due diligence | 617 100% | 103 17% | 214 35% | 153 25% | 79 13% | 61 10% | 7 1% | 317 51% | 140 23% | 3.36 |
| Training | 617 100% | 100 16% | 185 30% | 176 29% | 78 13% | 72 12% | 6 1% | 285 46% | 150 24% | 3.27 |
| Ongoing monitoring | 617 100% | 84 14% | 195 32% | 168 27% | 85 14% | 76 12% | 9 1% | 279 45% | 161 26% | 3.21 |
| Environmental and Social Governance | 617 100% | 97 16% | 181 29% | 164 27% | 95 15% | 69 11% | 11 2% | 278 45% | 164 27% | 3.23 |
| Implementing a risk based approach | 617 100% | 81 13% | 179 29% | 171 28% | 93 15% | 88 14% | 5 1% | 260 42% | 181 29% | 3.12 |
| Supplier due diligence e.g. ensuring that modern slavery and human trafficking is not taking place within the business or supply chains | 617 100% | 85 14% | 161 26% | 132 21% | 112 18% | 115 19% | 12 2% | 246 40% | 227 37% | 2.98 |
| Anti bribery and corruption checks | 617 100% | 82 13% | 141 23% | 140 23% | 120 19% | 120 19% | 14 2% | 223 36% | 240 39% | 2.91 |
| Adverse media checks | 617 100% | 71 12% | 148 24% | 163 26% | 109 18% | 112 18% | 14 2% | 219 35% | 221 36% | 2.93 |
| Identifying beneficial owners | 617 100% | 69 11% | 143 23% | 189 31% | 94 15% | 97 16% | 25 4% | 212 34% | 191 31% | 2.99 |
| Politically exposed persons and sanction checks | 617 100% | 69 11% | 139 23% | 171 28% | 108 18% | 110 18% | 20 3% | 208 34% | 218 35% | 2.91 |
| Formulation of modern Anti-Slavery policy | 617 100% | 84 14% | 91 15% | 143 23% | 105 17% | 164 27% | 30 5% | 175 28% | 269 44% | 2.70 |

Compliance and Procurement Sentiment - Wave 2

Q5_T2. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

CONCERNED SUMMARY

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Customer/vendor due diligence | 317 | 217 | 100 | 171 | 146 | 68 | 79 | 63 | 107 | 39 | 122 | 146 | 200 | 25 | 21 | 93 | 22 | 49 | 52 | 54 | 37 | 29 |
| | 51% | 53% | 48% | 56% | 47% | 43% | 54% | 58% | 53% | 45% | 54% | 53% | 53% | 69% | 62% | 50% | 59% | 56% | 50% | 51% | 54% | 43% |
| | | | | b | | | | a | | | | | | d | | | | | | | | |
| Training | 285 | 193 | 92 | 156 | 129 | 46 | 78 | 56 | 104 | 29 | 113 | 131 | 181 | 25 | 20 | 83 | 22 | 44 | 53 | 48 | 31 | 33 |
| | 46% | 47% | 44% | 51% | 42% | 29% | 53% | 51% | 51% | 33% | 50% | 47% | 48% | 69% | 59% | 45% | 59% | 51% | 51% | 46% | 45% | 49% |
| | | | | b | | | a | a | a | | a | | | ad | | | | | | | | |
| Ongoing monitoring | 279 | 192 | 87 | 163 | 116 | 47 | 72 | 56 | 103 | 28 | 112 | 129 | 182 | 22 | 18 | 78 | 22 | 49 | 60 | 42 | 29 | 27 |
| | 45% | 47% | 41% | 53% | 38% | 30% | 49% | 51% | 51% | 32% | 50% | 47% | 48% | 61% | 53% | 42% | 59% | 56% | 58% | 40% | 42% | 40% |
| | | | | b | | | a | a | a | | a | | | d | | | | d | bcd | | | |
| Environmental and Social Governance | 278 | 196 | 82 | 146 | 132 | 54 | 75 | 48 | 100 | 35 | 104 | 130 | 182 | 20 | 21 | 71 | 20 | 48 | 47 | 52 | 29 | 29 |
| | 45% | 48% | 39% | 47% | 43% | 34% | 51% | 44% | 49% | 40% | 46% | 47% | 48% | 56% | 62% | 38% | 54% | 55% | 45% | 50% | 42% | 43% |
| | | | | b | | | a | a | a | | | | | d | | | | d | | | | |
| Implementing a risk based approach | 260 | 170 | 90 | 147 | 113 | 48 | 69 | 51 | 92 | 27 | 112 | 114 | 166 | 24 | 20 | 83 | 21 | 41 | 56 | 50 | 27 | 22 |
| | 42% | 42% | 43% | 48% | 37% | 30% | 47% | 47% | 45% | 31% | 50% | 41% | 44% | 67% | 59% | 45% | 57% | 47% | 54% | 48% | 39% | 32% |
| | | | | b | | | a | a | a | | a | | | ad | | | | | d | d | | |
| Supplier due diligence e.g. ensuring that modern slavery and human trafficking is not taking place within the business or supply chains | 246 | 162 | 84 | 138 | 108 | 44 | 65 | 49 | 87 | 30 | 95 | 113 | 155 | 24 | 21 | 70 | 18 | 39 | 47 | 46 | 26 | 25 |
| | 40% | 40% | 40% | 45% | 35% | 28% | 45% | 45% | 43% | 34% | 42% | 41% | 41% | 67% | 62% | 38% | 49% | 45% | 45% | 44% | 38% | 37% |
| | | | | b | | | a | a | a | | | | | adf | ad | | | | | | | |
| Anti bribery and corruption checks | 223 | 144 | 79 | 122 | 101 | 44 | 62 | 41 | 76 | 32 | 90 | 93 | 138 | 20 | 18 | 67 | 14 | 37 | 47 | 40 | 21 | 19 |
| | 36% | 35% | 38% | 40% | 33% | 28% | 42% | 38% | 37% | 37% | 40% | 34% | 37% | 56% | 53% | 36% | 38% | 43% | 45% | 38% | 30% | 28% |
| | | | | a | | | a | | | | | | | ad | | | | | d | | | |
| Adverse media checks | 219 | 148 | 71 | 126 | 93 | 41 | 56 | 49 | 72 | 24 | 93 | 94 | 145 | 21 | 19 | 69 | 17 | 35 | 43 | 31 | 23 | 26 |
| | 35% | 36% | 34% | 41% | 30% | 26% | 38% | 45% | 35% | 28% | 41% | 34% | 39% | 58% | 56% | 37% | 46% | 40% | 41% | 30% | 33% | 38% |
| | | | | b | | | a | a | | | a | | | ad | ad | | | | | | | |
| Identifying beneficial owners | 212 | 148 | 64 | 123 | 89 | 33 | 58 | 44 | 77 | 23 | 98 | 85 | 135 | 22 | 18 | 57 | 20 | 39 | 47 | 37 | 21 | 19 |
| | 34% | 36% | 30% | 40% | 29% | 21% | 40% | 40% | 38% | 26% | 44% | 31% | 36% | 61% | 53% | 31% | 54% | 45% | 45% | 35% | 30% | 28% |
| | | | | b | | | a | a | a | | ac | | | ad | ad | | | d | d | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_T2. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

CONCERNED SUMMARY

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Politically exposed persons and sanction checks | 208 | 141 | 67 | 108 | 100 | 36 | 60 | 40 | 72 | 31 | 80 | 90 | 134 | 23 | 18 | 64 | 18 | 35 | 44 | 37 | 20 | 16 |
| | 34% | 35% | 32% | 35% | 32% | 23% | 41% | 37% | 35% | 36% | 36% | 33% | 36% | 64% | 53% | 35% | 49% | 40% | 42% | 35% | 29% | 24% |
| | | | | | | | a | a | a | | | | | adf | ad | | | | d | | | |
| Formulation of modern Anti-Slavery policy | 175 | 116 | 59 | 94 | 81 | 26 | 51 | 36 | 62 | 18 | 80 | 72 | 109 | 26 | 17 | 50 | 16 | 33 | 37 | 31 | 18 | 14 |
| | 28% | 29% | 28% | 31% | 26% | 16% | 35% | 33% | 31% | 21% | 36% | 26% | 29% | 72% | 50% | 27% | 43% | 38% | 36% | 30% | 26% | 21% |
| | | | | | | | a | a | a | | ac | | | adef | ad | | | | d | | | |
| None of the above | 138 | 90 | 48 | 54 | 84 | 48 | 28 | 21 | 41 | 28 | 38 | 62 | 76 | 3 | 2 | 41 | 7 | 17 | 21 | 23 | 15 | 19 |
| | 22% | 22% | 23% | 18% | 27% | 30% | 19% | 19% | 20% | 32% | 17% | 22% | 20% | 8% | 6% | 22% | 19% | 20% | 20% | 22% | 22% | 28% |
| | | | | a | | bcd | | | | b | | | c | | | c | | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_B2. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

NOT CONCERNED SUMMARY

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|-------------|-------------|----------------|-------------|-----------------|-----------------|-------------|-------------|-----------------|---------------------|--|----------------------|-------------------|---|----------------------------------|---------------------------|---------------------------------|----------------|--------------------|---------------|----------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Formulation of modern Anti-Slavery policy | 269 44% | 175 43% | 94 45% | 133 43% | 136 44% | 85 54% bd | 53 36% | 49 45% | 82 40% | 41 47% | 90 40% | 127 46% | 165 44% bcf | 6 17% | 8 24% | 86 46% bcf | 11 30% | 26 30% | 38 37% | 42 40% | 34 49% | 32 47% |
| Anti bribery and corruption checks | 240 39% | 163 40% | 77 37% | 112 36% | 128 41% | 69 44% | 48 33% | 43 39% | 80 39% | 32 37% | 85 38% | 113 41% | 151 40% f | 11 31% | 13 38% | 75 41% | 16 43% | 25 29% | 31 30% | 40 38% | 31 45% a | 30 44% |
| Supplier due diligence e.g. ensuring that modern slavery and human trafficking is not taking place within the business or supply chains | 227 37% | 145 36% | 82 39% | 105 34% | 122 39% | 66 42% | 50 34% | 38 35% | 73 36% | 33 38% | 79 35% | 108 39% | 133 35% c | 8 22% | 5 15% | 75 41% bc | 10 27% | 29 33% c | 36 35% | 37 35% | 31 45% | 26 38% |
| Adverse media checks | 221 36% | 138 34% | 83 40% | 97 31% | 124 40% a | 63 40% | 48 33% | 34 31% | 76 37% | 33 38% | 76 34% | 105 38% | 127 34% | 8 22% | 7 21% | 67 36% | 9 24% | 28 32% | 34 33% | 35 33% | 26 38% | 27 40% |
| Politically exposed persons and sanction checks | 218 35% | 132 32% | 86 41% a | 107 35% | 111 36% | 68 43% | 47 32% | 34 31% | 69 34% | 34 39% | 80 36% | 97 35% | 124 33% | 8 22% | 6 18% | 79 43% abcf | 10 27% | 22 25% | 29 28% | 41 39% | 28 41% | 27 40% |
| Identifying beneficial owners | 191 31% | 126 31% | 65 31% | 86 28% | 105 34% | 56 35% | 48 33% | 34 31% | 53 26% | 29 33% | 69 31% | 87 32% | 121 32% | 7 19% | 8 24% | 60 32% | 9 24% | 20 23% | 24 23% | 26 25% | 23 33% | 20 29% |
| Implementing a risk based approach | 181 29% | 121 30% | 60 29% | 85 28% | 96 31% | 52 33% | 39 27% | 35 32% | 54 27% | 30 34% | 59 26% | 81 29% | 112 30% | 7 19% | 6 18% | 52 28% | 8 22% | 21 24% | 27 26% | 24 23% | 25 36% | 23 34% |
| Environmental and Social Governance | 164 27% | 98 24% | 66 31% | 74 24% | 90 29% | 45 28% | 35 24% | 33 30% | 51 25% | 20 23% | 64 28% | 71 26% | 90 24% | 8 22% | 6 18% | 61 33% a | 9 24% | 20 23% | 32 31% | 25 24% | 22 32% | 19 28% |
| Ongoing monitoring | 161 26% | 101 25% | 60 29% | 77 25% | 84 27% | 42 27% | 35 24% | 26 24% | 58 29% | 22 25% | 56 25% | 74 27% | 95 25% | 9 25% | 9 26% | 55 30% f | 8 22% | 16 18% | 21 20% | 23 22% | 20 29% | 24 35% a |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q5_B2. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

NOT CONCERNED SUMMARY

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------------|----------|------|----------|------------|---------------|------|----------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|-----------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Training | 150 | 93 | 57 | 69 | 81 | 46 | 31 | 28 | 45 | 26 | 52 | 67 | 89 | 7 | 7 | 50 | 6 | 18 | 23 | 23 | 22 | 14 |
| | 24% | 23% | 27% | 22% | 26% | 29% | 21% | 26% | 22% | 30% | 23% | 24% | 24% | 19% | 21% | 27% | 16% | 21% | 22% | 22% | 32% | 21% |
| Customer/vendor due diligence | 140 | 87 | 53 | 63 | 77 | 43 | 31 | 21 | 45 | 23 | 41 | 67 | 83 | 6 | 7 | 43 | 7 | 17 | 17 | 21 | 19 | 20 |
| | 23% | 21% | 25% | 20% | 25% | 27% | 21% | 19% | 22% | 26% | 18% | 24% | 22% | 17% | 21% | 23% | 19% | 20% | 16% | 20% | 28% | 29% a |
| None of the above | 193 | 129 | 64 | 96 | 97 | 36 | 58 | 33 | 66 | 32 | 70 | 82 | 114 | 15 | 11 | 50 | 17 | 38 | 43 | 31 | 23 | 20 |
| | 31% | 32% | 30% | 31% | 31% | 23% | 40% a | 30% | 33% a | 37% | 31% | 30% | 30% | 42% | 32% | 27% | 46% d | 44% ad | 41% | 30% | 33% | 29% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_1. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Customer/vendor due diligence

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very concerned (5.0) | 103 17% | 69 17% | 34 16% | 54 18% | 49 16% | 16 10% | 31 21% | 20 18% | 36 18% | 13 15% | 42 19% | 45 16% | 61 16% | 16 44% | 11 32% | 34 18% | 11 30% | 20 23% | 21 20% | 11 10% | 12 17% | 10 15% |
| Fairly concerned (4.0) | 214 35% | 148 36% | 66 31% | 117 38% | 97 31% | 52 33% | 48 33% | 43 39% | 71 35% | 26 30% | 80 36% | 101 37% | 139 37% | 9 25% | 10 29% | 59 32% | 11 30% | 29 33% | 31 30% | 43 41% | 25 36% | 19 28% |
| Neutral (3.0) | 153 25% | 96 24% | 57 27% | 68 22% | 85 28% | 44 28% | 35 24% | 25 23% | 49 24% | 24 28% | 61 27% | 62 22% | 88 23% | 5 14% | 5 15% | 49 26% | 8 22% | 19 22% | 35 34% | 28 27% | 13 19% | 17 25% |
| Not very concerned (2.0) | 79 13% | 50 12% | 29 14% | 33 11% | 46 15% | 27 17% | 16 11% | 11 10% | 25 12% | 11 13% | 25 11% | 41 15% | 47 13% | 2 6% | 5 15% | 28 15% | 6 16% | 9 10% | 10 10% | 15 14% | 10 14% | 7 10% |
| Not at all concerned (1.0) | 61 10% | 37 9% | 24 11% | 30 10% | 31 10% | 16 10% | 15 10% | 10 9% | 20 10% | 12 14% | 16 7% | 26 9% | 36 10% | 4 11% | 2 6% | 15 8% | 1 3% | 8 9% | 7 7% | 6 6% | 9 13% | 13 19% |
| Don't know | 7 1% | 7 2% | - | 6 2% | 1 * | 3 2% | 1 1% | - | 2 1% | 1 1% | 1 * | 1 * | 5 1% | - | 1 3% | - | - | 2 2% | - | 2 2% | - | 2 3% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 317 51% | 217 53% | 100 48% | 171 56% | 146 47% | 68 43% | 79 54% | 63 58% | 107 53% | 39 45% | 122 54% | 146 53% | 200 53% | 25 69% | 21 62% | 93 50% | 22 59% | 49 56% | 52 50% | 54 51% | 37 54% | 29 43% |
| Net: Not concerned | 140 23% | 87 21% | 53 25% | 63 20% | 77 25% | 43 27% | 31 21% | 21 19% | 45 22% | 23 26% | 41 18% | 67 24% | 83 22% | 6 17% | 7 21% | 43 23% | 7 19% | 17 20% | 17 16% | 21 20% | 19 28% | 20 29% |
| Mean score | 3.36 | 3.41 | 3.27 | 3.44 | 3.28 | 3.16 | 3.44 | 3.48 | 3.39 | 3.20 | 3.48 | 3.36 | 3.38 | 3.86 | 3.70 | 3.37 | 3.68 | 3.52 | 3.47 | 3.37 | 3.30 | 3.09 |
| Standard deviation | 1.20 | 1.18 | 1.22 | 1.19 | 1.20 | 1.15 | 1.24 | 1.18 | 1.20 | 1.25 | 1.13 | 1.19 | 1.19 | 1.36 | 1.26 | 1.18 | 1.16 | 1.23 | 1.12 | 1.05 | 1.29 | 1.34 |
| Standard error | .05 | .06 | .08 | .07 | .07 | .09 | .10 | .11 | .08 | .14 | .08 | .07 | .06 | .23 | .22 | .09 | .19 | .13 | .11 | .10 | .15 | .17 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_2. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Formulation of modern Anti-Slavery policy

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Very concerned | (5.0) | 84 | 62 | 22 | 44 | 40 | 14 | 25 | 19 | 26 | 11 | 36 | 32 | 55 | 13 | 6 | 18 | 4 | 18 | 18 | 11 | 11 | 7 |
| | | 14% | 15% | 10% | 14% | 13% | 9% | 17% | 17% | 13% | 13% | 16% | 12% | 15% | 36% | 18% | 10% | 11% | 21% | 17% | 10% | 16% | 10% |
| | | | | | | | | a | a | | | | | ade | | | | d | | | | | |
| Fairly concerned | (4.0) | 91 | 54 | 37 | 50 | 41 | 12 | 26 | 17 | 36 | 7 | 44 | 40 | 54 | 13 | 11 | 32 | 12 | 15 | 19 | 20 | 7 | 7 |
| | | 15% | 13% | 18% | 16% | 13% | 8% | 18% | 16% | 18% | 8% | 20% | 14% | 14% | 36% | 32% | 17% | 32% | 17% | 18% | 19% | 10% | 10% |
| | | | | | | | | a | a | a | | | | adf | ad | | ad | | | | | | |
| Neutral | (3.0) | 143 | 92 | 51 | 65 | 78 | 40 | 34 | 23 | 46 | 23 | 46 | 66 | 80 | 3 | 8 | 45 | 10 | 25 | 28 | 30 | 14 | 14 |
| | | 23% | 23% | 24% | 21% | 25% | 25% | 23% | 21% | 23% | 26% | 20% | 24% | 21% | 8% | 24% | 24% | 27% | 29% | 27% | 29% | 20% | 21% |
| | | | | | | | | | | | | | | | b | b | b | b | | | | | |
| Not very concerned | (2.0) | 105 | 61 | 44 | 50 | 55 | 28 | 18 | 23 | 36 | 11 | 43 | 48 | 59 | 4 | 1 | 44 | 4 | 8 | 15 | 19 | 13 | 10 |
| | | 17% | 15% | 21% | 16% | 18% | 18% | 12% | 21% | 18% | 13% | 19% | 17% | 16% | 11% | 3% | 24% | 11% | 9% | 14% | 18% | 19% | 15% |
| | | | | | | | | | | | | | | c | | acf | | | | | | | |
| Not at all concerned | (1.0) | 164 | 114 | 50 | 83 | 81 | 57 | 35 | 26 | 46 | 30 | 47 | 79 | 106 | 2 | 7 | 42 | 7 | 18 | 23 | 23 | 21 | 22 |
| | | 27% | 28% | 24% | 27% | 26% | 36% | 24% | 24% | 23% | 34% | 21% | 29% | 28% | 6% | 21% | 23% | 19% | 21% | 22% | 22% | 30% | 32% |
| | | | | | | | bcd | | | | b | b | | b | | b | b | b | | | | | |
| Don't know | | 30 | 24 | 6 | 16 | 14 | 7 | 8 | 1 | 13 | 5 | 9 | 11 | 22 | 1 | 1 | 4 | - | 3 | 1 | 2 | 3 | 8 |
| | | 5% | 6% | 3% | 5% | 5% | 4% | 5% | 1% | 6% | 6% | 4% | 4% | 6% | 3% | 3% | 2% | - | 3% | 1% | 2% | 4% | 12% |
| | | | | | | | | | c | | | | | | | | | | | | | ab | |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | | 175 | 116 | 59 | 94 | 81 | 26 | 51 | 36 | 62 | 18 | 80 | 72 | 109 | 26 | 17 | 50 | 16 | 33 | 37 | 31 | 18 | 14 |
| | | 28% | 29% | 28% | 31% | 26% | 16% | 35% | 33% | 31% | 21% | 36% | 26% | 29% | 72% | 50% | 27% | 43% | 38% | 36% | 30% | 26% | 21% |
| | | | | | | | | a | a | a | | | | adef | ad | | | | d | | | | |
| Net: Not concerned | | 269 | 175 | 94 | 133 | 136 | 85 | 53 | 49 | 82 | 41 | 90 | 127 | 165 | 6 | 8 | 86 | 11 | 26 | 38 | 42 | 34 | 32 |
| | | 44% | 43% | 45% | 43% | 44% | 54% | 36% | 45% | 40% | 47% | 40% | 46% | 44% | 17% | 24% | 46% | 30% | 30% | 37% | 40% | 49% | 47% |
| | | | | | | | bd | | | | | | | bcd | | bcd | | | | | | | |
| Mean score | | 2.70 | 2.71 | 2.69 | 2.73 | 2.67 | 2.32 | 2.91 | 2.81 | 2.79 | 2.49 | 2.90 | 2.62 | 2.70 | 3.89 | 3.24 | 2.67 | 3.05 | 3.08 | 2.94 | 2.78 | 2.61 | 2.45 |
| | | | | | | | | a | a | a | | | | | acdef | ad | | | ad | d | | | |
| Standard deviation | | 1.39 | 1.44 | 1.31 | 1.42 | 1.37 | 1.30 | 1.44 | 1.42 | 1.36 | 1.41 | 1.39 | 1.37 | 1.43 | 1.21 | 1.39 | 1.28 | 1.29 | 1.42 | 1.39 | 1.29 | 1.46 | 1.40 |
| Standard error | | .06 | .07 | .09 | .08 | .08 | .11 | .12 | .14 | .10 | .16 | .09 | .08 | .08 | .20 | .24 | .10 | .21 | .15 | .14 | .13 | .18 | .18 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_3. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Supplier due diligence e.g. ensuring that modern slavery and human trafficking is not taking place within the business or supply chains

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|---|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 85 | 55 | 30 | 42 | 43 | 12 | 21 | 20 | 31 | 11 | 30 | 39 | 46 | 8 | 6 | 19 | 7 | 21 | 16 | 12 | 9 | 9 |
| | 14% | 14% | 14% | 14% | 14% | 8% | 14% | 18% | 15% | 13% | 13% | 14% | 12% | 22% | 18% | 10% | 19% | 24% | 15% | 11% | 13% | 13% |
| | | | | | | | a | a | | | | | | d | | | ad | | | | | |
| Fairly concerned | 161 | 107 | 54 | 96 | 65 | 32 | 44 | 29 | 56 | 19 | 65 | 74 | 109 | 16 | 15 | 51 | 11 | 18 | 31 | 34 | 17 | 16 |
| | 26% | 26% | 26% | 31% | 21% | 20% | 30% | 27% | 28% | 22% | 29% | 27% | 29% | 44% | 44% | 28% | 30% | 21% | 30% | 32% | 25% | 24% |
| | | | | b | | | a | | | | | | | df | f | | | | | | | |
| Neutral | 132 | 92 | 40 | 58 | 74 | 45 | 27 | 22 | 38 | 21 | 49 | 51 | 80 | 4 | 7 | 37 | 9 | 18 | 20 | 21 | 12 | 14 |
| | 21% | 23% | 19% | 19% | 24% | 28% | 18% | 20% | 19% | 24% | 22% | 18% | 21% | 11% | 21% | 20% | 24% | 21% | 19% | 20% | 17% | 21% |
| | | | | bd | | | | | | | | | | | | | | | | | | |
| Not very concerned | 112 | 66 | 46 | 50 | 62 | 31 | 23 | 18 | 40 | 12 | 46 | 52 | 60 | 7 | 3 | 44 | 8 | 18 | 21 | 20 | 14 | 11 |
| | 18% | 16% | 22% | 16% | 20% | 20% | 16% | 17% | 20% | 14% | 20% | 19% | 16% | 19% | 9% | 24% | 22% | 21% | 20% | 19% | 20% | 16% |
| | | | | a | | | | | | | | | | | | | | | | | | |
| Not at all concerned | 115 | 79 | 36 | 55 | 60 | 35 | 27 | 20 | 33 | 21 | 33 | 56 | 73 | 1 | 2 | 31 | 2 | 11 | 15 | 17 | 17 | 15 |
| | 19% | 19% | 17% | 18% | 19% | 22% | 18% | 18% | 16% | 24% | 15% | 20% | 19% | 3% | 6% | 17% | 5% | 13% | 14% | 16% | 25% | 22% |
| | | | | b | | | | | | b | | | be | | | b | | | | | | |
| Don't know | 12 | 8 | 4 | 7 | 5 | 3 | 4 | - | 5 | 3 | 2 | 4 | 8 | - | 1 | 3 | - | 1 | 1 | 1 | - | 3 |
| | 2% | 2% | 2% | 2% | 2% | 2% | 3% | - | 2% | 3% | 1% | 1% | 2% | - | 3% | 2% | - | 1% | 1% | 1% | - | 4% |
| | | | | | | | | | | | | | | | | | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 246 | 162 | 84 | 138 | 108 | 44 | 65 | 49 | 87 | 30 | 95 | 113 | 155 | 24 | 21 | 70 | 18 | 39 | 47 | 46 | 26 | 25 |
| | 40% | 40% | 40% | 45% | 35% | 28% | 45% | 45% | 43% | 34% | 42% | 41% | 41% | 67% | 62% | 38% | 49% | 45% | 45% | 44% | 38% | 37% |
| | | | | b | | | a | a | a | | | | | adf | ad | | | | | | | |
| Net: Not concerned | 227 | 145 | 82 | 105 | 122 | 66 | 50 | 38 | 73 | 33 | 79 | 108 | 133 | 8 | 5 | 75 | 10 | 29 | 36 | 37 | 31 | 26 |
| | 37% | 36% | 39% | 34% | 39% | 42% | 34% | 35% | 36% | 38% | 35% | 39% | 35% | 22% | 15% | 41% | 27% | 33% | 35% | 35% | 45% | 38% |
| | | | | c | | | | | | c | | | c | | | bc | | c | | | | |
| Mean score | 2.98 | 2.98 | 2.98 | 3.07 | 2.90 | 2.71 | 3.06 | 3.10 | 3.06 | 2.85 | 3.06 | 2.96 | 2.99 | 3.64 | 3.61 | 2.91 | 3.35 | 3.23 | 3.12 | 3.04 | 2.81 | 2.89 |
| | | | | a | | | a | a | a | | | | | ad | ad | | | | | | | |
| Standard deviation | 1.33 | 1.33 | 1.33 | 1.33 | 1.33 | 1.24 | 1.35 | 1.38 | 1.34 | 1.38 | 1.28 | 1.37 | 1.33 | 1.13 | 1.09 | 1.27 | 1.18 | 1.37 | 1.31 | 1.28 | 1.40 | 1.38 |
| Standard error | .05 | .07 | .09 | .08 | .08 | .10 | .11 | .13 | .09 | .15 | .09 | .08 | .07 | .19 | .19 | .09 | .19 | .15 | .13 | .13 | .17 | .17 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_4. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Ongoing monitoring

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 84 | 61 | 23 | 47 | 37 | 9 | 22 | 23 | 30 | 8 | 38 | 37 | 58 | 10 | 7 | 23 | 9 | 16 | 18 | 17 | 8 | 6 |
| | 14% | 15% | 11% | 15% | 12% | 6% | 15% | 21% | 15% | 9% | 17% | 13% | 15% | 28% | 21% | 12% | 24% | 18% | 17% | 16% | 12% | 9% |
| | | | | | | | a | a | a | | | | | d | | | | | | | | |
| Fairly concerned | 195 | 131 | 64 | 116 | 79 | 38 | 50 | 33 | 73 | 20 | 74 | 92 | 124 | 12 | 11 | 55 | 13 | 33 | 42 | 25 | 21 | 21 |
| | 32% | 32% | 30% | 38% | 26% | 24% | 34% | 30% | 36% | 23% | 33% | 33% | 33% | 33% | 32% | 30% | 35% | 38% | 40% | 24% | 30% | 31% |
| | | | | b | | | | | a | | | | | | | | | | b | | | |
| Neutral | 168 | 105 | 63 | 63 | 105 | 64 | 37 | 26 | 41 | 35 | 55 | 71 | 92 | 5 | 6 | 52 | 7 | 21 | 23 | 39 | 19 | 16 |
| | 27% | 26% | 30% | 20% | 34% | 41% | 25% | 24% | 20% | 40% | 24% | 26% | 24% | 14% | 18% | 28% | 19% | 24% | 22% | 37% | 28% | 24% |
| | | | | a | | bcd | | | | bc | | | | | | | | | a | | | |
| Not very concerned | 85 | 53 | 32 | 41 | 44 | 24 | 16 | 14 | 31 | 9 | 33 | 40 | 52 | 6 | 5 | 31 | 4 | 7 | 11 | 16 | 12 | 11 |
| | 14% | 13% | 15% | 13% | 14% | 15% | 11% | 13% | 15% | 10% | 15% | 14% | 14% | 17% | 15% | 17% | 11% | 8% | 11% | 15% | 17% | 16% |
| Not at all concerned | 76 | 48 | 28 | 36 | 40 | 18 | 19 | 12 | 27 | 13 | 23 | 34 | 43 | 3 | 4 | 24 | 4 | 9 | 10 | 7 | 8 | 13 |
| | 12% | 12% | 13% | 12% | 13% | 11% | 13% | 11% | 13% | 15% | 10% | 12% | 11% | 8% | 12% | 13% | 11% | 10% | 10% | 7% | 12% | 19% |
| | | | | | | | | | | | | | | | | | | | | | | b |
| Don't know | 9 | 9 | - | 5 | 4 | 5 | 2 | 1 | 1 | 2 | 2 | 2 | 7 | - | 1 | - | - | 1 | - | 1 | 1 | 1 |
| | 1% | 2% | - | 2% | 1% | 3% | 1% | 1% | * | 2% | 1% | 1% | 2% | - | 3% | - | - | 1% | - | 1% | 1% | 1% |
| | | b | | | | d | | | | | | | | | d | | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 279 | 192 | 87 | 163 | 116 | 47 | 72 | 56 | 103 | 28 | 112 | 129 | 182 | 22 | 18 | 78 | 22 | 49 | 60 | 42 | 29 | 27 |
| | 45% | 47% | 41% | 53% | 38% | 30% | 49% | 51% | 51% | 32% | 50% | 47% | 48% | 61% | 53% | 42% | 59% | 56% | 58% | 40% | 42% | 40% |
| | | | | b | | | a | a | a | | a | a | | d | | | d | | bcd | | | |
| Net: Not concerned | 161 | 101 | 60 | 77 | 84 | 42 | 35 | 26 | 58 | 22 | 56 | 74 | 95 | 9 | 9 | 55 | 8 | 16 | 21 | 23 | 20 | 24 |
| | 26% | 25% | 29% | 25% | 27% | 27% | 24% | 24% | 29% | 25% | 25% | 27% | 25% | 25% | 26% | 30% | 22% | 18% | 20% | 22% | 29% | 35% |
| | | | | | | | | | | | | | | | f | | | | | | | a |
| Mean score | 3.21 | 3.26 | 3.10 | 3.32 | 3.10 | 2.97 | 3.28 | 3.38 | 3.24 | 3.01 | 3.32 | 3.21 | 3.28 | 3.56 | 3.36 | 3.12 | 3.51 | 3.47 | 3.45 | 3.28 | 3.13 | 2.94 |
| | | | | b | | | a | a | a | | a | | | | | | | d | d | | | |
| Standard deviation | 1.21 | 1.22 | 1.19 | 1.23 | 1.19 | 1.06 | 1.24 | 1.27 | 1.26 | 1.16 | 1.22 | 1.22 | 1.22 | 1.30 | 1.32 | 1.21 | 1.28 | 1.20 | 1.18 | 1.12 | 1.20 | 1.28 |
| Standard error | .05 | .06 | .08 | .07 | .07 | .09 | .10 | .12 | .09 | .13 | .08 | .07 | .06 | .22 | .23 | .09 | .21 | .13 | .12 | .11 | .15 | .16 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_5. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Anti bribery and corruption checks

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very concerned (5.0) | 82 13% | 49 12% | 33 16% | 42 14% | 40 13% | 12 8% | 25 17% | 15 14% | 30 15% | 7 8% | 37 16% | 36 13% | 49 13% | 11 31% | 7 21% | 25 14% | 6 16% | 18 21% | 19 18% | 9 9% | 10 14% | 8 12% |
| Fairly concerned (4.0) | 141 23% | 95 23% | 46 22% | 80 26% | 61 20% | 32 20% | 37 25% | 26 24% | 46 23% | 25 29% | 53 24% | 57 21% | 89 24% | 9 25% | 11 32% | 42 23% | 8 22% | 19 22% | 28 27% | 31 30% | 11 16% | 11 16% |
| Neutral (3.0) | 140 23% | 89 22% | 51 24% | 66 21% | 74 24% | 42 27% | 31 21% | 24 22% | 43 21% | 21 24% | 46 20% | 66 24% | 77 20% | 4 11% | 3 9% | 41 22% | 6 16% | 23 26% | 26 25% | 23 22% | 16 23% | 14 21% |
| Not very concerned (2.0) | 120 19% | 77 19% | 43 20% | 56 18% | 64 21% | 34 22% | 18 12% | 23 21% | 45 22% | 13 15% | 48 21% | 58 21% | 70 19% | 10 28% | 9 26% | 47 25% | 10 27% | 14 16% | 13 13% | 22 21% | 13 19% | 15 22% |
| Not at all concerned (1.0) | 120 19% | 86 21% | 34 16% | 56 18% | 64 21% | 35 22% | 30 21% | 20 18% | 35 17% | 19 22% | 37 16% | 55 20% | 81 22% | 1 3% | 4 12% | 28 15% | 6 16% | 11 13% | 18 17% | 18 17% | 18 26% | 15 22% |
| Don't know | 14 2% | 11 3% | 3 1% | 8 3% | 6 2% | 3 2% | 5 3% | 1 1% | 4 2% | 2 2% | 4 2% | 4 1% | 10 3% | 1 3% | - | 2 1% | 1 3% | 2 2% | - | 2 2% | 1 1% | 5 7% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 223 36% | 144 35% | 79 38% | 122 40% | 101 33% | 44 28% | 62 42% | 41 38% | 76 37% | 32 37% | 90 40% | 93 34% | 138 37% | 20 56% | 18 53% | 67 36% | 14 38% | 37 43% | 47 45% | 40 38% | 21 30% | 19 28% |
| Net: Not concerned | 240 39% | 163 40% | 77 37% | 112 36% | 128 41% | 69 44% | 48 33% | 43 39% | 80 39% | 32 37% | 85 38% | 113 41% | 151 40% | 11 31% | 13 38% | 75 41% | 16 43% | 25 29% | 31 30% | 40 38% | 31 45% | 30 44% |
| Mean score | 2.91 | 2.86 | 3.00 | 2.99 | 2.83 | 2.69 | 3.06 a | 2.94 | 2.95 | 2.86 | 3.02 | 2.86 | 2.88 | 3.54 ad | 3.24 | 2.94 | 2.94 | 3.22 a | 3.16 cd | 2.91 | 2.74 | 2.71 |
| Standard deviation | 1.33 | 1.34 | 1.32 | 1.33 | 1.33 | 1.25 | 1.40 | 1.33 | 1.33 | 1.29 | 1.34 | 1.32 | 1.36 | 1.29 | 1.37 | 1.28 | 1.37 | 1.31 | 1.34 | 1.25 | 1.40 | 1.35 |
| Standard error | .05 | .07 | .09 | .08 | .08 | .10 | .12 | .13 | .09 | .14 | .09 | .08 | .07 | .22 | .24 | .09 | .23 | .14 | .13 | .12 | .17 | .17 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q5_6. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Politically exposed persons and sanction checks

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|---------------------|-------------|----------------|-------------|---------------|-------------|-----------------|----------------|-----------------|---------------------|--|----------------------|----------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|-----------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very concerned | (5.0) 69 11% | 51 13% | 18 9% | 36 12% | 33 11% | 5 3% | 26 18% ad | 17 16% a | 21 10% a | 8 9% | 31 14% | 27 10% | 50 13% | 11 31% adf | 7 21% | 19 10% | 6 16% | 12 14% | 17 16% | 14 13% | 5 7% | 7 10% |
| Fairly concerned | (4.0) 139 23% | 90 22% | 49 23% | 72 23% | 67 22% | 31 20% | 34 23% | 23 21% | 51 25% | 23 26% | 49 22% | 63 23% | 84 22% | 12 33% | 11 32% | 45 24% | 12 32% | 23 26% | 27 26% d | 23 22% | 15 22% | 9 13% |
| Neutral | (3.0) 171 28% | 119 29% | 52 25% | 81 26% | 90 29% | 48 30% | 33 23% | 34 31% | 56 28% | 19 22% | 58 26% | 83 30% | 105 28% | 5 14% | 8 24% | 39 21% | 9 24% | 28 32% bd | 30 29% | 26 25% | 19 28% | 20 29% |
| Not very concerned | (2.0) 108 18% | 58 14% | 50 24% a | 59 19% | 49 16% | 37 23% | 22 15% | 16 15% | 33 16% | 15 17% | 50 22% c | 40 14% | 56 15% | 6 17% | 6 18% | 50 27% af | 6 16% | 8 9% | 14 13% | 23 22% | 13 19% | 15 22% |
| Not at all concerned | (1.0) 110 18% | 74 18% | 36 17% | 48 16% | 62 20% | 31 20% | 25 17% | 18 17% | 36 18% | 19 22% | 30 13% | 57 21% b | 68 18% c | 2 6% | - - | 29 16% c | 4 11% | 14 16% c | 15 14% | 18 17% | 15 22% | 12 18% |
| Don't know | 20 3% | 15 4% | 5 2% | 12 4% | 8 3% | 6 4% | 6 4% | 1 1% | 6 3% | 3 3% | 7 3% | 6 2% | 13 3% | - - | 2 6% | 3 2% | - - | 2 2% | 1 1% | 1 1% | 2 3% | 5 7% ab |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 208 34% | 141 35% | 67 32% | 108 35% | 100 32% | 36 23% | 60 41% a | 40 37% a | 72 35% a | 31 36% | 80 36% | 90 33% | 134 36% | 23 64% adf | 18 53% ad | 64 35% | 18 49% | 35 40% | 44 42% d | 37 35% | 20 29% | 16 24% |
| Net: Not concerned | 218 35% | 132 32% | 86 41% a | 107 35% | 111 36% | 68 43% | 47 32% | 34 31% | 69 34% | 34 39% | 80 36% | 97 35% | 124 33% | 8 22% | 6 18% | 79 43% abcf | 10 27% | 22 25% | 29 28% | 41 39% | 28 41% | 27 40% |
| Mean score | 2.91 | 2.96 | 2.82 | 2.96 | 2.87 | 2.62 | 3.10 a | 3.05 a | 2.94 a | 2.83 | 3.00 | 2.86 | 2.98 | 3.67 adf | 3.59 ad | 2.86 | 3.27 | 3.13 | 3.17 cd | 2.92 | 2.73 | 2.75 |
| Standard deviation | 1.27 | 1.29 | 1.23 | 1.26 | 1.28 | 1.12 | 1.36 | 1.29 | 1.26 | 1.32 | 1.26 | 1.27 | 1.30 | 1.24 | 1.04 | 1.25 | 1.24 | 1.26 | 1.28 | 1.30 | 1.25 | 1.24 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .09 | .12 | .12 | .09 | .14 | .09 | .08 | .07 | .21 | .18 | .09 | .20 | .14 | .13 | .13 | .15 | .16 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q5_7. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Identifying beneficial owners

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned (5.0) | 69 | 47 | 22 | 38 | 31 | 7 | 23 | 15 | 24 | 11 | 31 | 26 | 41 | 9 | 6 | 21 | 10 | 14 | 16 | 11 | 4 | 5 |
| | 11% | 12% | 10% | 12% | 10% | 4% | 16% | 14% | 12% | 13% | 14% | 9% | 11% | 25% | 18% | 11% | 27% | 16% | 15% | 10% | 6% | 7% |
| | | | | | | | a | a | a | | | | | ad | | ad | | | | | | |
| Fairly concerned (4.0) | 143 | 101 | 42 | 85 | 58 | 26 | 35 | 29 | 53 | 12 | 67 | 59 | 94 | 13 | 12 | 36 | 10 | 25 | 31 | 26 | 17 | 14 |
| | 23% | 25% | 20% | 28% | 19% | 16% | 24% | 27% | 26% | 14% | 30% | 21% | 25% | 36% | 35% | 19% | 27% | 29% | 30% | 25% | 25% | 21% |
| | | | | b | | | | a | a | | ac | | | d | d | | | | | | | |
| Neutral (3.0) | 189 | 116 | 73 | 84 | 105 | 63 | 38 | 29 | 59 | 34 | 54 | 90 | 105 | 6 | 7 | 61 | 8 | 26 | 32 | 38 | 24 | 22 |
| | 31% | 29% | 35% | 27% | 34% | 40% | 26% | 27% | 29% | 39% | 24% | 33% | 28% | 17% | 21% | 33% | 22% | 30% | 31% | 36% | 35% | 32% |
| | | | | bcd | | | | | | b | b | | | | | | | | | | | |
| Not very concerned (2.0) | 94 | 63 | 31 | 45 | 49 | 27 | 21 | 19 | 27 | 14 | 39 | 40 | 63 | 5 | 4 | 33 | 6 | 6 | 15 | 12 | 13 | 8 |
| | 15% | 15% | 15% | 15% | 16% | 17% | 14% | 17% | 13% | 16% | 17% | 14% | 17% | 14% | 12% | 18% | 16% | 7% | 14% | 11% | 19% | 12% |
| | | | | | | | | | | | | | f | | | f | | | | | | |
| Not at all concerned (1.0) | 97 | 63 | 34 | 41 | 56 | 29 | 27 | 15 | 26 | 15 | 30 | 47 | 58 | 2 | 4 | 27 | 3 | 14 | 9 | 14 | 10 | 12 |
| | 16% | 15% | 16% | 13% | 18% | 18% | 18% | 14% | 13% | 17% | 13% | 17% | 15% | 6% | 12% | 15% | 8% | 16% | 9% | 13% | 14% | 18% |
| Don't know | 25 | 17 | 8 | 15 | 10 | 6 | 2 | 2 | 14 | 1 | 4 | 14 | 15 | 1 | 1 | 7 | - | 2 | 1 | 4 | 1 | 7 |
| | 4% | 4% | 4% | 5% | 3% | 4% | 1% | 2% | 7% | 1% | 2% | 5% | 4% | 3% | 3% | 4% | - | 2% | 1% | 4% | 1% | 10% |
| | | | | | | | | | b | | b | | | | | | | | | | | ac |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 212 | 148 | 64 | 123 | 89 | 33 | 58 | 44 | 77 | 23 | 98 | 85 | 135 | 22 | 18 | 57 | 20 | 39 | 47 | 37 | 21 | 19 |
| | 34% | 36% | 30% | 40% | 29% | 21% | 40% | 40% | 38% | 26% | 44% | 31% | 36% | 61% | 53% | 31% | 54% | 45% | 45% | 35% | 30% | 28% |
| | | | | b | | | a | a | a | | ac | | | ad | ad | | ad | d | d | | | |
| Net: Not concerned | 191 | 126 | 65 | 86 | 105 | 56 | 48 | 34 | 53 | 29 | 69 | 87 | 121 | 7 | 8 | 60 | 9 | 20 | 24 | 26 | 23 | 20 |
| | 31% | 31% | 31% | 28% | 34% | 35% | 33% | 31% | 26% | 33% | 31% | 32% | 32% | 19% | 24% | 32% | 24% | 23% | 23% | 25% | 33% | 29% |
| Mean score | 2.99 | 3.02 | 2.94 | 3.12 | 2.86 | 2.70 | 3.04 | 3.09 | 3.12 | 2.88 | 3.14 | 2.91 | 2.99 | 3.63 | 3.36 | 2.95 | 3.49 | 3.22 | 3.29 | 3.08 | 2.88 | 2.87 |
| | | | | b | | | a | a | a | | c | | | ad | | ad | | | cd | | | |
| Standard deviation | 1.23 | 1.25 | 1.21 | 1.23 | 1.23 | 1.10 | 1.34 | 1.26 | 1.21 | 1.23 | 1.25 | 1.22 | 1.24 | 1.19 | 1.27 | 1.21 | 1.28 | 1.29 | 1.16 | 1.17 | 1.13 | 1.22 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .09 | .11 | .12 | .09 | .13 | .08 | .08 | .07 | .20 | .22 | .09 | .21 | .14 | .11 | .12 | .14 | .16 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_8. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Implementing a risk based approach

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 81 | 53 | 28 | 42 | 39 | 9 | 29 | 17 | 26 | 9 | 43 | 27 | 51 | 11 | 5 | 24 | 7 | 16 | 19 | 16 | 9 | 7 |
| | 13% | 13% | 13% | 14% | 13% | 6% | 20% | 16% | 13% | 10% | 19% | 10% | 14% | 31% | 15% | 13% | 19% | 18% | 18% | 15% | 13% | 10% |
| | | | | | | | a | a | a | | c | | | ad | | | | | | | | |
| Fairly concerned | 179 | 117 | 62 | 105 | 74 | 39 | 40 | 34 | 66 | 18 | 69 | 87 | 115 | 13 | 15 | 59 | 14 | 25 | 37 | 34 | 18 | 15 |
| | 29% | 29% | 30% | 34% | 24% | 25% | 27% | 31% | 33% | 21% | 31% | 32% | 31% | 36% | 44% | 32% | 38% | 29% | 36% | 32% | 26% | 22% |
| | | | | b | | | | | | | | | | | | | | | | | | |
| Neutral | 171 | 111 | 60 | 73 | 98 | 55 | 36 | 23 | 57 | 29 | 52 | 81 | 93 | 5 | 7 | 50 | 8 | 25 | 21 | 31 | 17 | 22 |
| | 28% | 27% | 29% | 24% | 32% | 35% | 25% | 21% | 28% | 33% | 23% | 29% | 25% | 14% | 21% | 27% | 22% | 29% | 20% | 30% | 25% | 32% |
| | | | | a | | c | | | | | | | | | | | | | | | | |
| Not very concerned | 93 | 64 | 29 | 49 | 44 | 26 | 20 | 19 | 27 | 14 | 33 | 40 | 60 | 4 | 3 | 28 | 5 | 9 | 15 | 13 | 14 | 9 |
| | 15% | 16% | 14% | 16% | 14% | 16% | 14% | 17% | 13% | 16% | 15% | 14% | 16% | 11% | 9% | 15% | 14% | 10% | 14% | 12% | 20% | 13% |
| Not at all concerned | 88 | 57 | 31 | 36 | 52 | 26 | 19 | 16 | 27 | 16 | 26 | 41 | 52 | 3 | 3 | 24 | 3 | 12 | 12 | 11 | 11 | 14 |
| | 14% | 14% | 15% | 12% | 17% | 16% | 13% | 15% | 13% | 18% | 12% | 15% | 14% | 8% | 9% | 13% | 8% | 14% | 12% | 10% | 16% | 21% |
| Don't know | 5 | 5 | - | 3 | 2 | 3 | 2 | - | - | 1 | 2 | - | 5 | - | 1 | - | - | - | - | - | - | 1 |
| | 1% | 1% | - | 1% | 1% | 2% | 1% | - | - | 1% | 1% | - | 1% | - | 3% | - | - | - | - | - | - | 1% |
| | | | | | | d | | | | | | | | | d | | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 260 | 170 | 90 | 147 | 113 | 48 | 69 | 51 | 92 | 27 | 112 | 114 | 166 | 24 | 20 | 83 | 21 | 41 | 56 | 50 | 27 | 22 |
| | 42% | 42% | 43% | 48% | 37% | 30% | 47% | 47% | 45% | 31% | 50% | 41% | 44% | 67% | 59% | 45% | 57% | 47% | 54% | 48% | 39% | 32% |
| | | | | b | | | a | a | a | | a | | | ad | | | | | d | d | | |
| Net: Not concerned | 181 | 121 | 60 | 85 | 96 | 52 | 39 | 35 | 54 | 30 | 59 | 81 | 112 | 7 | 6 | 52 | 8 | 21 | 27 | 24 | 25 | 23 |
| | 29% | 30% | 29% | 28% | 31% | 33% | 27% | 32% | 27% | 34% | 26% | 29% | 30% | 19% | 18% | 28% | 22% | 24% | 26% | 23% | 36% | 34% |
| Mean score | 3.12 | 3.11 | 3.13 | 3.22 | 3.01 | 2.86 | 3.28 | 3.16 | 3.18 | 2.88 | 3.31 | 3.07 | 3.14 | 3.69 | 3.48 | 3.17 | 3.46 | 3.28 | 3.35 | 3.30 | 3.00 | 2.88 |
| | | | | b | | | a | | a | | ac | | | ad | | | | | d | d | | |
| Standard deviation | 1.24 | 1.24 | 1.24 | 1.22 | 1.25 | 1.15 | 1.30 | 1.30 | 1.22 | 1.24 | 1.27 | 1.20 | 1.25 | 1.26 | 1.15 | 1.22 | 1.19 | 1.27 | 1.26 | 1.18 | 1.28 | 1.27 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .09 | .11 | .12 | .09 | .13 | .08 | .07 | .06 | .21 | .20 | .09 | .20 | .14 | .12 | .12 | .15 | .16 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_9. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Adverse media checks

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very concerned (5.0) | 71 12% | 51 13% | 20 10% | 43 14% | 28 9% | 9 6% | 22 15% | 18 17% | 22 11% | 9 10% | 31 14% | 29 11% | 51 14% | 12 33% | 10 29% | 24 13% | 9 24% | 11 13% | 12 12% | 16 15% | 8 12% | 8 12% |
| Fairly concerned (4.0) | 148 24% | 97 24% | 51 24% | 83 27% | 65 21% | 32 20% | 34 23% | 31 28% | 50 25% | 15 17% | 62 28% | 65 24% | 94 25% | 9 25% | 9 26% | 45 24% | 8 22% | 24 28% | 31 30% | 15 14% | 15 22% | 18 26% |
| Neutral (3.0) | 163 26% | 110 27% | 53 25% | 75 24% | 88 28% | 50 32% | 38 26% | 26 24% | 49 24% | 27 31% | 54 24% | 72 26% | 95 25% | 7 19% | 7 21% | 46 25% | 11 30% | 22 25% | 26 25% | 38 36% | 19 28% | 13 19% |
| Not very concerned (2.0) | 109 18% | 64 16% | 45 21% | 53 17% | 56 18% | 28 18% | 24 16% | 18 17% | 39 19% | 14 16% | 43 19% | 51 18% | 62 16% | 6 17% | 5 15% | 39 21% | 6 16% | 13 15% | 19 18% | 15 14% | 14 20% | 10 15% |
| Not at all concerned (1.0) | 112 18% | 74 18% | 38 18% | 44 14% | 68 22% | 35 22% | 24 16% | 16 15% | 37 18% | 19 22% | 33 15% | 54 20% | 65 17% | 2 6% | 2 6% | 28 15% | 3 8% | 15 17% | 15 14% | 20 19% | 12 17% | 17 25% |
| Don't know | 14 2% | 11 3% | 3 1% | 10 3% | 4 1% | 4 3% | 4 3% | - - | 6 3% | 3 3% | 2 1% | 5 2% | 9 2% | - - | 1 3% | 3 2% | - - | 2 2% | 1 1% | 1 1% | 1 1% | 2 3% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 219 35% | 148 36% | 71 34% | 126 41% | 93 30% | 41 26% | 56 38% | 49 45% | 72 35% | 24 28% | 93 41% | 94 34% | 145 39% | 21 58% | 19 56% | 69 37% | 17 46% | 35 40% | 43 41% | 31 30% | 23 33% | 26 38% |
| Net: Not concerned | 221 36% | 138 34% | 83 40% | 97 31% | 124 40% | 63 40% | 48 33% | 34 31% | 76 37% | 33 38% | 76 34% | 105 38% | 127 34% | 8 22% | 7 21% | 67 36% | 9 24% | 28 32% | 34 33% | 35 33% | 26 38% | 27 40% |
| Mean score | 2.93 | 2.97 | 2.86 | 3.09 b | 2.77 | 2.69 | 3.04 a | 3.16 a | 2.90 | 2.77 | 3.07 | 2.87 | 3.01 | 3.64 adf | 3.61 adf | 2.99 | 3.38 | 3.04 | 3.06 | 2.92 | 2.90 | 2.85 |
| Standard deviation | 1.28 | 1.29 | 1.25 | 1.27 | 1.27 | 1.20 | 1.31 | 1.30 | 1.28 | 1.28 | 1.27 | 1.28 | 1.30 | 1.27 | 1.25 | 1.27 | 1.26 | 1.30 | 1.24 | 1.30 | 1.27 | 1.39 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .10 | .11 | .12 | .09 | .14 | .09 | .08 | .07 | .21 | .22 | .09 | .21 | .14 | .12 | .13 | .15 | .17 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_10. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Training

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|----------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Very concerned | (5.0) | 100 | 75 | 25 | 57 | 43 | 13 | 33 | 19 | 34 | 9 | 51 | 36 | 72 | 14 | 9 | 25 | 9 | 16 | 22 | 20 | 6 | 12 |
| | | 16% | 18% | 12% | 19% | 14% | 8% | 23% | 17% | 17% | 10% | 23% | 13% | 19% | 39% | 26% | 14% | 24% | 18% | 21% | 19% | 9% | 18% |
| | | | b | | | | a | a | a | | ac | | | adf | | | | | c | | | | |
| Fairly concerned | (4.0) | 185 | 118 | 67 | 99 | 86 | 33 | 45 | 37 | 70 | 20 | 62 | 95 | 109 | 11 | 11 | 58 | 13 | 28 | 31 | 28 | 25 | 21 |
| | | 30% | 29% | 32% | 32% | 28% | 21% | 31% | 34% | 34% | 23% | 28% | 34% | 29% | 31% | 32% | 31% | 35% | 32% | 30% | 27% | 36% | 31% |
| | | | | | | | a | a | a | | a | | | | | | | | | | | | |
| Neutral | (3.0) | 176 | 115 | 61 | 79 | 97 | 63 | 35 | 25 | 53 | 31 | 59 | 77 | 100 | 4 | 7 | 52 | 9 | 25 | 28 | 34 | 16 | 19 |
| | | 29% | 28% | 29% | 26% | 31% | 40% | 24% | 23% | 26% | 36% | 26% | 28% | 27% | 11% | 21% | 28% | 24% | 29% | 27% | 32% | 23% | 28% |
| | | | | | | | bcd | | | | | | | b | | b | | b | | | | | |
| Not very concerned | (2.0) | 78 | 51 | 27 | 34 | 44 | 28 | 16 | 13 | 21 | 15 | 30 | 32 | 49 | 3 | 3 | 26 | 5 | 9 | 12 | 15 | 13 | 2 |
| | | 13% | 13% | 13% | 11% | 14% | 18% | 11% | 12% | 10% | 17% | 13% | 12% | 13% | 8% | 9% | 14% | 14% | 10% | 12% | 14% | 19% | 3% |
| | | | | | | | d | | | | | | | | | | | | | d | d | d | |
| Not at all concerned | (1.0) | 72 | 42 | 30 | 35 | 37 | 18 | 15 | 15 | 24 | 11 | 22 | 35 | 40 | 4 | 4 | 24 | 1 | 9 | 11 | 8 | 9 | 12 |
| | | 12% | 10% | 14% | 11% | 12% | 11% | 10% | 14% | 12% | 13% | 10% | 13% | 11% | 11% | 12% | 13% | 3% | 10% | 11% | 8% | 13% | 18% |
| | | | | | | | | | | | | | | | | | | | | | | b | |
| Don't know | | 6 | 6 | - | 4 | 2 | 3 | 2 | - | 1 | 1 | 1 | 1 | 6 | - | - | - | - | - | - | - | - | 2 |
| | | 1% | 1% | - | 1% | 1% | 2% | 1% | - | * | * | * | 2% | - | - | - | - | - | - | - | - | - | 3% |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | | 285 | 193 | 92 | 156 | 129 | 46 | 78 | 56 | 104 | 29 | 113 | 131 | 181 | 25 | 20 | 83 | 22 | 44 | 53 | 48 | 31 | 33 |
| | | 46% | 47% | 44% | 51% | 42% | 29% | 53% | 51% | 51% | 33% | 50% | 47% | 48% | 69% | 59% | 45% | 59% | 51% | 51% | 46% | 45% | 49% |
| | | | | | b | | a | a | a | | a | a | | ad | | | | | | | | | |
| Net: Not concerned | | 150 | 93 | 57 | 69 | 81 | 46 | 31 | 28 | 45 | 26 | 52 | 67 | 89 | 7 | 7 | 50 | 6 | 18 | 23 | 23 | 22 | 14 |
| | | 24% | 23% | 27% | 22% | 26% | 29% | 21% | 26% | 22% | 30% | 23% | 24% | 24% | 19% | 21% | 27% | 16% | 21% | 22% | 22% | 32% | 21% |
| Mean score | | 3.27 | 3.33 | 3.14 | 3.36 | 3.18 | 2.97 | 3.45 | 3.29 | 3.34 | 3.01 | 3.40 | 3.24 | 3.34 | 3.78 | 3.53 | 3.18 | 3.65 | 3.38 | 3.39 | 3.35 | 3.09 | 3.29 |
| | | | | | | | a | a | a | | a | | | ad | | | d | | | | | | |
| Standard deviation | | 1.22 | 1.22 | 1.22 | 1.23 | 1.20 | 1.10 | 1.25 | 1.28 | 1.22 | 1.16 | 1.25 | 1.20 | 1.24 | 1.35 | 1.31 | 1.22 | 1.09 | 1.20 | 1.24 | 1.17 | 1.20 | 1.32 |
| Standard error | | .05 | .06 | .08 | .07 | .07 | .09 | .10 | .12 | .09 | .13 | .08 | .07 | .06 | .23 | .22 | .09 | .18 | .13 | .12 | .11 | .14 | .16 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_11. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Environmental and Social Governance

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|---------------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very concerned | (5.0) 97 16% | 65 16% | 32 15% | 54 18% | 43 14% | 16 10% | 30 21% | 22 20% | 29 14% | 12 14% | 41 18% | 41 15% | 64 17% | 12 33% | 12 35% | 26 14% | 11 30% | 18 21% | 17 16% | 12 11% | 11 16% | 10 15% |
| Fairly concerned | (4.0) 181 29% | 131 32% | 50 24% | 92 30% | 89 29% | 38 24% | 45 31% | 26 24% | 71 35% | 23 26% | 63 28% | 89 32% | 118 31% | 8 22% | 9 26% | 45 24% | 9 24% | 30 34% | 30 29% | 40 38% | 18 26% | 19 28% |
| Neutral | (3.0) 164 27% | 106 26% | 58 28% | 82 27% | 82 27% | 56 35% | 32 22% | 28 26% | 48 24% | 30 34% | 55 24% | 71 26% | 96 26% | 7 19% | 6 18% | 50 27% | 8 22% | 19 22% | 24 23% | 28 27% | 18 26% | 18 26% |
| Not very concerned | (2.0) 95 15% | 56 14% | 39 19% | 43 14% | 52 17% | 26 16% | 17 12% | 21 19% | 31 15% | 11 13% | 38 17% | 43 16% | 54 14% | 7 19% | 4 12% | 38 21% | 6 16% | 10 11% | 19 18% | 19 18% | 14 20% | 9 13% |
| Not at all concerned | (1.0) 69 11% | 42 10% | 27 13% | 31 10% | 38 12% | 19 12% | 18 12% | 12 11% | 20 10% | 9 10% | 26 12% | 28 10% | 36 10% | 1 3% | 2 6% | 23 12% | 3 8% | 10 11% | 13 13% | 6 6% | 8 12% | 10 15% |
| Don't know | 11 2% | 7 2% | 4 2% | 6 2% | 5 2% | 3 2% | 4 3% | - - | 4 2% | 2 2% | 2 1% | 4 1% | 8 2% | 1 3% | 1 3% | 3 2% | - - | - - | 1 1% | - - | - - | 2 3% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 278 45% | 196 48% | 82 39% | 146 47% | 132 43% | 54 34% | 75 51% | 48 44% | 100 49% | 35 40% | 104 46% | 130 47% | 182 48% | 20 56% | 21 62% | 71 38% | 20 54% | 48 55% | 47 45% | 52 50% | 29 42% | 29 43% |
| Net: Not concerned | 164 27% | 98 24% | 66 31% | 74 24% | 90 29% | 45 28% | 35 24% | 33 30% | 51 25% | 20 23% | 64 28% | 71 26% | 90 24% | 8 22% | 6 18% | 61 33% | 9 24% | 20 23% | 32 31% | 25 24% | 22 32% | 19 28% |
| Mean score | 3.23 | 3.30 | 3.10 | 3.31 | 3.15 | 3.04 | 3.37 | 3.23 | 3.29 | 3.21 | 3.25 | 3.26 | 3.33 | 3.66 | 3.76 | 3.07 | 3.51 | 3.41 | 3.18 | 3.31 | 3.14 | 3.15 |
| Standard deviation | 1.22 | 1.20 | 1.25 | 1.22 | 1.23 | 1.15 | 1.29 | 1.28 | 1.19 | 1.17 | 1.27 | 1.20 | 1.20 | 1.24 | 1.25 | 1.24 | 1.30 | 1.26 | 1.27 | 1.08 | 1.25 | 1.28 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .09 | .11 | .12 | .08 | .13 | .08 | .07 | .06 | .21 | .22 | .09 | .21 | .14 | .13 | .11 | .15 | .16 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_SUM. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

SUMMARY TABLE

Base: All respondents (excluding don't know)

| | | | | | | | NETS | | |
|---|-------------|----------------|------------------|------------|--------------------|----------------------|------------|---------------|------|
| | Total | Very concerned | Fairly concerned | Neutral | Not very concerned | Not at all concerned | Concerned | Not concerned | Mean |
| Customer/vendor due diligence | 610 100% | 103 17% | 214 35% | 153 25% | 79 13% | 61 10% | 317 52% | 140 23% | 3.36 |
| Training | 611 100% | 100 16% | 185 30% | 176 29% | 78 13% | 72 12% | 285 47% | 150 25% | 3.27 |
| Ongoing monitoring | 608 100% | 84 14% | 195 32% | 168 28% | 85 14% | 76 13% | 279 46% | 161 26% | 3.21 |
| Environmental and Social Governance | 606 100% | 97 16% | 181 30% | 164 27% | 95 16% | 69 11% | 278 46% | 164 27% | 3.23 |
| Implementing a risk based approach | 612 100% | 81 13% | 179 29% | 171 28% | 93 15% | 88 14% | 260 42% | 181 30% | 3.12 |
| Supplier due diligence e.g. ensuring that modern slavery and human trafficking is not taking place within the business or supply chains | 605 100% | 85 14% | 161 27% | 132 22% | 112 19% | 115 19% | 246 41% | 227 38% | 2.98 |
| Anti bribery and corruption checks | 603 100% | 82 14% | 141 23% | 140 23% | 120 20% | 120 20% | 223 37% | 240 40% | 2.91 |
| Adverse media checks | 603 100% | 71 12% | 148 25% | 163 27% | 109 18% | 112 19% | 219 36% | 221 37% | 2.93 |
| Identifying beneficial owners | 592 100% | 69 12% | 143 24% | 189 32% | 94 16% | 97 16% | 212 36% | 191 32% | 2.99 |
| Politically exposed persons and sanction checks | 597 100% | 69 12% | 139 23% | 171 29% | 108 18% | 110 18% | 208 35% | 218 37% | 2.91 |
| Formulation of modern Anti-Slavery policy | 587 100% | 84 14% | 91 16% | 143 24% | 105 18% | 164 28% | 175 30% | 269 46% | 2.70 |

Compliance and Procurement Sentiment - Wave 2

Q5_1. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Customer/vendor due diligence

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 610 | 400 | 210 | 302 | 308 | 155 | 145 | 109 | 201 | 86 | 224 | 275 | 371 | 36 | 33 | 185 | 37 | 85 | 104 | 103 | 69 | 66 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 103 | 69 | 34 | 54 | 49 | 16 | 31 | 20 | 36 | 13 | 42 | 45 | 61 | 16 | 11 | 34 | 11 | 20 | 21 | 11 | 12 | 10 |
| | 17% | 17% | 16% | 18% | 16% | 10% | 21% | 18% | 18% | 15% | 19% | 16% | 16% | 44% | 33% | 18% | 30% | 24% | 20% | 11% | 17% | 15% |
| | | | | | | | a | | a | | | | | adf | a | | a | | | | | |
| Fairly concerned | 214 | 148 | 66 | 117 | 97 | 52 | 48 | 43 | 71 | 26 | 80 | 101 | 139 | 9 | 10 | 59 | 11 | 29 | 31 | 43 | 25 | 19 |
| | 35% | 37% | 31% | 39% | 31% | 34% | 33% | 39% | 35% | 30% | 36% | 37% | 37% | 25% | 30% | 32% | 30% | 34% | 30% | 42% | 36% | 29% |
| Neutral | 153 | 96 | 57 | 68 | 85 | 44 | 35 | 25 | 49 | 24 | 61 | 62 | 88 | 5 | 5 | 49 | 8 | 19 | 35 | 28 | 13 | 17 |
| | 25% | 24% | 27% | 23% | 28% | 28% | 24% | 23% | 24% | 28% | 27% | 23% | 24% | 14% | 15% | 26% | 22% | 22% | 34% | 27% | 19% | 26% |
| | | | | | | | | | | | | | | | | | | | c | | | |
| Not very concerned | 79 | 50 | 29 | 33 | 46 | 27 | 16 | 11 | 25 | 11 | 25 | 41 | 47 | 2 | 5 | 28 | 6 | 9 | 10 | 15 | 10 | 7 |
| | 13% | 13% | 14% | 11% | 15% | 17% | 11% | 10% | 12% | 13% | 11% | 15% | 13% | 6% | 15% | 15% | 16% | 11% | 10% | 15% | 14% | 11% |
| Not at all concerned | 61 | 37 | 24 | 30 | 31 | 16 | 15 | 10 | 20 | 12 | 16 | 26 | 36 | 4 | 2 | 15 | 1 | 8 | 7 | 6 | 9 | 13 |
| | 10% | 9% | 11% | 10% | 10% | 10% | 10% | 9% | 10% | 14% | 7% | 9% | 10% | 11% | 6% | 8% | 3% | 9% | 7% | 6% | 13% | 20% |
| | | | | | | | | | | | | | | | | | | | ab | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 317 | 217 | 100 | 171 | 146 | 68 | 79 | 63 | 107 | 39 | 122 | 146 | 200 | 25 | 21 | 93 | 22 | 49 | 52 | 54 | 37 | 29 |
| | 52% | 54% | 48% | 57% | 47% | 44% | 54% | 58% | 53% | 45% | 54% | 53% | 54% | 69% | 64% | 50% | 59% | 58% | 50% | 52% | 54% | 44% |
| | | | | b | | | | a | | | | | | d | | | | | | | | |
| Net: Not concerned | 140 | 87 | 53 | 63 | 77 | 43 | 31 | 21 | 45 | 23 | 41 | 67 | 83 | 6 | 7 | 43 | 7 | 17 | 17 | 21 | 19 | 20 |
| | 23% | 22% | 25% | 21% | 25% | 28% | 21% | 19% | 22% | 27% | 18% | 24% | 22% | 17% | 21% | 23% | 19% | 20% | 16% | 20% | 28% | 30% |
| | | | | | | | | | | | | | | | | | | | a | | | |
| Mean score | 3.36 | 3.41 | 3.27 | 3.44 | 3.28 | 3.16 | 3.44 | 3.48 | 3.39 | 3.20 | 3.48 | 3.36 | 3.38 | 3.86 | 3.70 | 3.37 | 3.68 | 3.52 | 3.47 | 3.37 | 3.30 | 3.09 |
| | | | | | | | a | a | | | | | | ad | | | | | d | | | |
| Standard deviation | 1.20 | 1.18 | 1.22 | 1.19 | 1.20 | 1.15 | 1.24 | 1.18 | 1.20 | 1.25 | 1.13 | 1.19 | 1.19 | 1.36 | 1.26 | 1.18 | 1.16 | 1.23 | 1.12 | 1.05 | 1.29 | 1.34 |
| Standard error | .05 | .06 | .08 | .07 | .07 | .09 | .10 | .11 | .08 | .14 | .08 | .07 | .06 | .23 | .22 | .09 | .19 | .13 | .11 | .10 | .15 | .17 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_2. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Formulation of modern Anti-Slavery policy

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|---------------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 587 100% | 383 100% | 204 100% | 292 100% | 295 100% | 151 100% | 138 100% | 108 100% | 190 100% | 82 100% | 216 100% | 265 100% | 354 100% | 35 100% | 33 100% | 181 100% | 37 100% | 84 100% | 103 100% | 103 100% | 66 100% | 60 100% |
| Very concerned | (5.0) 84 14% | 62 16% | 22 11% | 44 15% | 40 14% | 14 9% | 25 18% | 19 18% | 26 14% | 11 13% | 36 17% | 32 12% | 55 16% | 13 37% | 6 18% | 18 10% | 4 11% | 18 21% | 18 17% | 11 11% | 11 17% | 7 12% |
| Fairly concerned | (4.0) 91 16% | 54 14% | 37 18% | 50 17% | 41 14% | 12 8% | 26 19% | 17 16% | 36 19% | 7 9% | 44 20% | 40 15% | 54 15% | 13 37% | 11 33% | 32 18% | 12 32% | 15 18% | 19 18% | 20 19% | 7 11% | 7 12% |
| Neutral | (3.0) 143 24% | 92 24% | 51 25% | 65 22% | 78 26% | 40 26% | 34 25% | 23 21% | 46 24% | 23 28% | 46 21% | 66 25% | 80 23% | 3 9% | 8 24% | 45 25% | 10 27% | 25 30% | 28 27% | 30 29% | 14 21% | 14 23% |
| Not very concerned | (2.0) 105 18% | 61 16% | 44 22% | 50 17% | 55 19% | 28 19% | 18 13% | 23 21% | 36 19% | 11 13% | 43 20% | 48 18% | 59 17% | 4 11% | 1 3% | 44 24% | 4 11% | 8 10% | 15 15% | 19 18% | 13 20% | 10 17% |
| Not at all concerned | (1.0) 164 28% | 114 30% | 50 25% | 83 28% | 81 27% | 57 38% | 35 25% | 26 24% | 46 24% | 30 37% | 47 22% | 79 30% | 106 30% | 2 6% | 7 21% | 42 23% | 7 19% | 18 21% | 23 22% | 23 22% | 21 32% | 22 37% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 175 30% | 116 30% | 59 29% | 94 32% | 81 27% | 26 17% | 51 37% | 36 33% | 62 33% | 18 22% | 80 37% | 72 27% | 109 31% | 26 74% | 17 52% | 50 28% | 16 43% | 33 39% | 37 36% | 31 30% | 18 27% | 14 23% |
| Net: Not concerned | 269 46% | 175 46% | 94 46% | 133 46% | 136 46% | 85 56% | 53 38% | 49 45% | 82 43% | 41 50% | 90 42% | 127 48% | 165 47% | 6 17% | 8 24% | 86 48% | 11 30% | 26 31% | 38 37% | 42 41% | 34 52% | 32 53% |
| Mean score | 2.70 | 2.71 | 2.69 | 2.73 | 2.67 | 2.32 | 2.91 | 2.81 | 2.79 | 2.49 | 2.90 | 2.62 | 2.70 | 3.89 | 3.24 | 2.67 | 3.05 | 3.08 | 2.94 | 2.78 | 2.61 | 2.45 |
| Standard deviation | 1.39 | 1.44 | 1.31 | 1.42 | 1.37 | 1.30 | 1.44 | 1.42 | 1.36 | 1.41 | 1.39 | 1.37 | 1.43 | 1.21 | 1.39 | 1.28 | 1.29 | 1.42 | 1.39 | 1.29 | 1.46 | 1.40 |
| Standard error | .06 | .07 | .09 | .08 | .08 | .11 | .12 | .14 | .10 | .16 | .09 | .08 | .08 | .20 | .24 | .10 | .21 | .15 | .14 | .13 | .18 | .18 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_3. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Supplier due diligence e.g. ensuring that modern slavery and human trafficking is not taking place within the business or supply chains

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 605 | 399 | 206 | 301 | 304 | 155 | 142 | 109 | 198 | 84 | 223 | 272 | 368 | 36 | 33 | 182 | 37 | 86 | 103 | 104 | 69 | 65 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 85 | 55 | 30 | 42 | 43 | 12 | 21 | 20 | 31 | 11 | 30 | 39 | 46 | 8 | 6 | 19 | 7 | 21 | 16 | 12 | 9 | 9 |
| | 14% | 14% | 15% | 14% | 14% | 8% | 15% | 18% | 16% | 13% | 13% | 14% | 13% | 22% | 18% | 10% | 19% | 24% | 16% | 12% | 13% | 14% |
| | | | | | | | a | a | a | | | | | | | | ad | | | | | |
| Fairly concerned | 161 | 107 | 54 | 96 | 65 | 32 | 44 | 29 | 56 | 19 | 65 | 74 | 109 | 16 | 15 | 51 | 11 | 18 | 31 | 34 | 17 | 16 |
| | 27% | 27% | 26% | 32% | 21% | 21% | 31% | 27% | 28% | 23% | 29% | 27% | 30% | 44% | 45% | 28% | 30% | 21% | 30% | 33% | 25% | 25% |
| | | | | b | | | a | | | | | | f | df | | | | | | | | |
| Neutral | 132 | 92 | 40 | 58 | 74 | 45 | 27 | 22 | 38 | 21 | 49 | 51 | 80 | 4 | 7 | 37 | 9 | 18 | 20 | 21 | 12 | 14 |
| | 22% | 23% | 19% | 19% | 24% | 29% | 19% | 20% | 19% | 25% | 22% | 19% | 22% | 11% | 21% | 20% | 24% | 21% | 19% | 20% | 17% | 22% |
| | | | | bd | | | | | | | | | | | | | | | | | | |
| Not very concerned | 112 | 66 | 46 | 50 | 62 | 31 | 23 | 18 | 40 | 12 | 46 | 52 | 60 | 7 | 3 | 44 | 8 | 18 | 21 | 20 | 14 | 11 |
| | 19% | 17% | 22% | 17% | 20% | 20% | 16% | 17% | 20% | 14% | 21% | 19% | 16% | 19% | 9% | 24% | 22% | 21% | 20% | 19% | 20% | 17% |
| | | | | a | | | | | | | | | | | a | | | | | | | |
| Not at all concerned | 115 | 79 | 36 | 55 | 60 | 35 | 27 | 20 | 33 | 21 | 33 | 56 | 73 | 1 | 2 | 31 | 2 | 11 | 15 | 17 | 17 | 15 |
| | 19% | 20% | 17% | 18% | 20% | 23% | 19% | 18% | 17% | 25% | 15% | 21% | 20% | 3% | 6% | 17% | 5% | 13% | 15% | 16% | 25% | 23% |
| | | | | b | | | | | | b | | | be | | | b | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 246 | 162 | 84 | 138 | 108 | 44 | 65 | 49 | 87 | 30 | 95 | 113 | 155 | 24 | 21 | 70 | 18 | 39 | 47 | 46 | 26 | 25 |
| | 41% | 41% | 41% | 46% | 36% | 28% | 46% | 45% | 44% | 36% | 43% | 42% | 42% | 67% | 64% | 38% | 49% | 45% | 46% | 44% | 38% | 38% |
| | | | | b | | | a | a | a | | | | | adf | ad | | | | | | | |
| Net: Not concerned | 227 | 145 | 82 | 105 | 122 | 66 | 50 | 38 | 73 | 33 | 79 | 108 | 133 | 8 | 5 | 75 | 10 | 29 | 36 | 37 | 31 | 26 |
| | 38% | 36% | 40% | 35% | 40% | 43% | 35% | 35% | 37% | 39% | 35% | 40% | 36% | 22% | 15% | 41% | 27% | 34% | 35% | 36% | 45% | 40% |
| | | | | c | | | | | | | | | c | | | bc | c | | | | | |
| Mean score | 2.98 | 2.98 | 2.98 | 3.07 | 2.90 | 2.71 | 3.06 | 3.10 | 3.06 | 2.85 | 3.06 | 2.96 | 2.99 | 3.64 | 3.61 | 2.91 | 3.35 | 3.23 | 3.12 | 3.04 | 2.81 | 2.89 |
| | | | | | | | a | a | a | | | | | ad | ad | | | | | | | |
| Standard deviation | 1.33 | 1.33 | 1.33 | 1.33 | 1.33 | 1.24 | 1.35 | 1.38 | 1.34 | 1.38 | 1.28 | 1.37 | 1.33 | 1.13 | 1.09 | 1.27 | 1.18 | 1.37 | 1.31 | 1.28 | 1.40 | 1.38 |
| Standard error | .05 | .07 | .09 | .08 | .08 | .10 | .11 | .13 | .09 | .15 | .09 | .08 | .07 | .19 | .19 | .09 | .19 | .15 | .13 | .13 | .17 | .17 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_4. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Ongoing monitoring

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 608 | 398 | 210 | 303 | 305 | 153 | 144 | 108 | 202 | 85 | 223 | 274 | 369 | 36 | 33 | 185 | 37 | 86 | 104 | 104 | 68 | 67 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 84 | 61 | 23 | 47 | 37 | 9 | 22 | 23 | 30 | 8 | 38 | 37 | 58 | 10 | 7 | 23 | 9 | 16 | 18 | 17 | 8 | 6 |
| | 14% | 15% | 11% | 16% | 12% | 6% | 15% | 21% | 15% | 9% | 17% | 14% | 16% | 28% | 21% | 12% | 24% | 19% | 17% | 16% | 12% | 9% |
| | | | | | | | a | a | a | | | | | d | | | | | | | | |
| Fairly concerned | 195 | 131 | 64 | 116 | 79 | 38 | 50 | 33 | 73 | 20 | 74 | 92 | 124 | 12 | 11 | 55 | 13 | 33 | 42 | 25 | 21 | 21 |
| | 32% | 33% | 30% | 38% | 26% | 25% | 35% | 31% | 36% | 24% | 33% | 34% | 34% | 33% | 33% | 30% | 35% | 38% | 40% | 24% | 31% | 31% |
| | | | | b | | | | | a | | | | | | | | | | b | | | |
| Neutral | 168 | 105 | 63 | 63 | 105 | 64 | 37 | 26 | 41 | 35 | 55 | 71 | 92 | 5 | 6 | 52 | 7 | 21 | 23 | 39 | 19 | 16 |
| | 28% | 26% | 30% | 21% | 34% | 42% | 26% | 24% | 20% | 41% | 25% | 26% | 25% | 14% | 18% | 28% | 19% | 24% | 22% | 38% | 28% | 24% |
| | | | | a | | bcd | | | | bc | | | | | | | | | a | | | |
| Not very concerned | 85 | 53 | 32 | 41 | 44 | 24 | 16 | 14 | 31 | 9 | 33 | 40 | 52 | 6 | 5 | 31 | 4 | 7 | 11 | 16 | 12 | 11 |
| | 14% | 13% | 15% | 14% | 14% | 16% | 11% | 13% | 15% | 11% | 15% | 15% | 14% | 17% | 15% | 17% | 11% | 8% | 11% | 15% | 18% | 16% |
| Not at all concerned | 76 | 48 | 28 | 36 | 40 | 18 | 19 | 12 | 27 | 13 | 23 | 34 | 43 | 3 | 4 | 24 | 4 | 9 | 10 | 7 | 8 | 13 |
| | 13% | 12% | 13% | 12% | 13% | 12% | 13% | 11% | 13% | 15% | 10% | 12% | 12% | 8% | 12% | 13% | 11% | 10% | 10% | 7% | 12% | 19% |
| | | | | | | | | | | | | | | | | | | | | | | b |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 279 | 192 | 87 | 163 | 116 | 47 | 72 | 56 | 103 | 28 | 112 | 129 | 182 | 22 | 18 | 78 | 22 | 49 | 60 | 42 | 29 | 27 |
| | 46% | 48% | 41% | 54% | 38% | 31% | 50% | 52% | 51% | 33% | 50% | 47% | 49% | 61% | 55% | 42% | 59% | 57% | 58% | 40% | 43% | 40% |
| | | | | b | | | a | a | a | | a | a | | d | | | d | | bd | | | |
| Net: Not concerned | 161 | 101 | 60 | 77 | 84 | 42 | 35 | 26 | 58 | 22 | 56 | 74 | 95 | 9 | 9 | 55 | 8 | 16 | 21 | 23 | 20 | 24 |
| | 26% | 25% | 29% | 25% | 28% | 27% | 24% | 24% | 29% | 26% | 25% | 27% | 26% | 25% | 27% | 30% | 22% | 19% | 20% | 22% | 29% | 36% |
| | | | | | | | | | | | | | | | | | | | | | | a |
| Mean score | 3.21 | 3.26 | 3.10 | 3.32 | 3.10 | 2.97 | 3.28 | 3.38 | 3.24 | 3.01 | 3.32 | 3.21 | 3.28 | 3.56 | 3.36 | 3.12 | 3.51 | 3.47 | 3.45 | 3.28 | 3.13 | 2.94 |
| | | | | b | | | a | a | a | | a | | | | | | d | | d | | | |
| Standard deviation | 1.21 | 1.22 | 1.19 | 1.23 | 1.19 | 1.06 | 1.24 | 1.27 | 1.26 | 1.16 | 1.22 | 1.22 | 1.22 | 1.30 | 1.32 | 1.21 | 1.28 | 1.20 | 1.18 | 1.12 | 1.20 | 1.28 |
| Standard error | .05 | .06 | .08 | .07 | .07 | .09 | .10 | .12 | .09 | .13 | .08 | .07 | .06 | .22 | .23 | .09 | .21 | .13 | .12 | .11 | .15 | .16 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q5_5. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Anti bribery and corruption checks

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 603 | 396 | 207 | 300 | 303 | 155 | 141 | 108 | 199 | 85 | 221 | 272 | 366 | 35 | 34 | 183 | 36 | 85 | 104 | 103 | 68 | 63 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 82 | 49 | 33 | 42 | 40 | 12 | 25 | 15 | 30 | 7 | 37 | 36 | 49 | 11 | 7 | 25 | 6 | 18 | 19 | 9 | 10 | 8 |
| | 14% | 12% | 16% | 14% | 13% | 8% | 18% | 14% | 15% | | 17% | 13% | 13% | 31% | 21% | 14% | 17% | 21% | 18% | 9% | 15% | 13% |
| | | | | | | | a | | a | | | | | ad | | | | | b | | | |
| Fairly concerned | 141 | 95 | 46 | 80 | 61 | 32 | 37 | 26 | 46 | 25 | 53 | 57 | 89 | 9 | 11 | 42 | 8 | 19 | 28 | 31 | 11 | 11 |
| | 23% | 24% | 22% | 27% | 20% | 21% | 26% | 24% | 23% | 29% | 24% | 21% | 24% | 26% | 32% | 23% | 22% | 22% | 27% | 30% | 16% | 17% |
| | | | | | | | | | | | | | | | | | | | c | | | |
| Neutral | 140 | 89 | 51 | 66 | 74 | 42 | 31 | 24 | 43 | 21 | 46 | 66 | 77 | 4 | 3 | 41 | 6 | 23 | 26 | 23 | 16 | 14 |
| | 23% | 22% | 25% | 22% | 24% | 27% | 22% | 22% | 22% | 25% | 21% | 24% | 21% | 11% | 9% | 22% | 17% | 27% | 25% | 22% | 24% | 22% |
| | | | | | | | | | | | | | | | | | | | c | | | |
| Not very concerned | 120 | 77 | 43 | 56 | 64 | 34 | 18 | 23 | 45 | 13 | 48 | 58 | 70 | 10 | 9 | 47 | 10 | 14 | 13 | 22 | 13 | 15 |
| | 20% | 19% | 21% | 19% | 21% | 22% | 13% | 21% | 23% | 15% | 22% | 21% | 19% | 29% | 26% | 26% | 28% | 16% | 13% | 21% | 19% | 24% |
| | | | | | | b | | | b | | | | | | | | | | | | | |
| Not at all concerned | 120 | 86 | 34 | 56 | 64 | 35 | 30 | 20 | 35 | 19 | 37 | 55 | 81 | 1 | 4 | 28 | 6 | 11 | 18 | 18 | 18 | 15 |
| | 20% | 22% | 16% | 19% | 21% | 23% | 21% | 19% | 18% | 22% | 17% | 20% | 22% | 3% | 12% | 15% | 17% | 13% | 17% | 17% | 26% | 24% |
| | | | | | | | | | | | | | b | | | b | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 223 | 144 | 79 | 122 | 101 | 44 | 62 | 41 | 76 | 32 | 90 | 93 | 138 | 20 | 18 | 67 | 14 | 37 | 47 | 40 | 21 | 19 |
| | 37% | 36% | 38% | 41% | 33% | 28% | 44% | 38% | 38% | 38% | 41% | 34% | 38% | 57% | 53% | 37% | 39% | 44% | 45% | 39% | 31% | 30% |
| | | | | | | a | | | | | | | | ad | | | | | | | | |
| Net: Not concerned | 240 | 163 | 77 | 112 | 128 | 69 | 48 | 43 | 80 | 32 | 85 | 113 | 151 | 11 | 13 | 75 | 16 | 25 | 31 | 40 | 31 | 30 |
| | 40% | 41% | 37% | 37% | 42% | 45% | 34% | 40% | 40% | 38% | 38% | 42% | 41% | 31% | 38% | 41% | 44% | 29% | 30% | 39% | 46% | 48% |
| | | | | | | | | | | | | | f | | | | | | a | | a | a |
| Mean score | 2.91 | 2.86 | 3.00 | 2.99 | 2.83 | 2.69 | 3.06 | 2.94 | 2.95 | 2.86 | 3.02 | 2.86 | 2.88 | 3.54 | 3.24 | 2.94 | 2.94 | 3.22 | 3.16 | 2.91 | 2.74 | 2.71 |
| | | | | | | a | | | | | | | | ad | | | | a | cd | | | |
| Standard deviation | 1.33 | 1.34 | 1.32 | 1.33 | 1.33 | 1.25 | 1.40 | 1.33 | 1.33 | 1.29 | 1.34 | 1.32 | 1.36 | 1.29 | 1.37 | 1.28 | 1.37 | 1.31 | 1.34 | 1.25 | 1.40 | 1.35 |
| Standard error | .05 | .07 | .09 | .08 | .08 | .10 | .12 | .13 | .09 | .14 | .09 | .08 | .07 | .22 | .24 | .09 | .23 | .14 | .13 | .12 | .17 | .17 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q5_6. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Politically exposed persons and sanction checks

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 597 | 392 | 205 | 296 | 301 | 152 | 140 | 108 | 197 | 84 | 218 | 270 | 363 | 36 | 32 | 182 | 37 | 85 | 103 | 104 | 67 | 63 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Very concerned | (5.0) | 69 | 51 | 18 | 36 | 33 | 5 | 26 | 17 | 21 | 8 | 31 | 27 | 50 | 11 | 7 | 19 | 6 | 12 | 17 | 14 | 5 | 7 |
| | | 12% | 13% | 9% | 12% | 11% | 3% | 19% | 16% | 11% | 10% | 14% | 10% | 14% | 31% | 22% | 10% | 16% | 14% | 17% | 13% | 7% | 11% |
| Fairly concerned | (4.0) | 139 | 90 | 49 | 72 | 67 | 31 | 34 | 23 | 51 | 23 | 49 | 63 | 84 | 12 | 11 | 45 | 12 | 23 | 27 | 23 | 15 | 9 |
| | | 23% | 23% | 24% | 24% | 22% | 20% | 24% | 21% | 26% | 27% | 22% | 23% | 23% | 33% | 34% | 25% | 32% | 27% | 26% | 22% | 22% | 14% |
| Neutral | (3.0) | 171 | 119 | 52 | 81 | 90 | 48 | 33 | 34 | 56 | 19 | 58 | 83 | 105 | 5 | 8 | 39 | 9 | 28 | 30 | 26 | 19 | 20 |
| | | 29% | 30% | 25% | 27% | 30% | 32% | 24% | 31% | 28% | 23% | 27% | 31% | 29% | 14% | 25% | 21% | 24% | 33% | 29% | 25% | 28% | 32% |
| Not very concerned | (2.0) | 108 | 58 | 50 | 59 | 49 | 37 | 22 | 16 | 33 | 15 | 50 | 40 | 56 | 6 | 6 | 50 | 6 | 8 | 14 | 23 | 13 | 15 |
| | | 18% | 15% | 24% | 20% | 16% | 24% | 16% | 15% | 17% | 18% | 23% | 15% | 15% | 17% | 19% | 27% | 16% | 9% | 14% | 22% | 19% | 24% |
| Not at all concerned | (1.0) | 110 | 74 | 36 | 48 | 62 | 31 | 25 | 18 | 36 | 19 | 30 | 57 | 68 | 2 | - | 29 | 4 | 14 | 15 | 18 | 15 | 12 |
| | | 18% | 19% | 18% | 16% | 21% | 20% | 18% | 17% | 18% | 23% | 14% | 21% | 19% | 6% | - | 16% | 11% | 16% | 15% | 17% | 22% | 19% |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | | 208 | 141 | 67 | 108 | 100 | 36 | 60 | 40 | 72 | 31 | 80 | 90 | 134 | 23 | 18 | 64 | 18 | 35 | 44 | 37 | 20 | 16 |
| | | 35% | 36% | 33% | 36% | 33% | 24% | 43% | 37% | 37% | 37% | 37% | 33% | 37% | 64% | 56% | 35% | 49% | 41% | 43% | 36% | 30% | 25% |
| Net: Not concerned | | 218 | 132 | 86 | 107 | 111 | 68 | 47 | 34 | 69 | 34 | 80 | 97 | 124 | 8 | 6 | 79 | 10 | 22 | 29 | 41 | 28 | 27 |
| | | 37% | 34% | 42% | 36% | 37% | 45% | 34% | 31% | 35% | 40% | 37% | 36% | 34% | 22% | 19% | 43% | 27% | 26% | 28% | 39% | 42% | 43% |
| Mean score | | 2.91 | 2.96 | 2.82 | 2.96 | 2.87 | 2.62 | 3.10 | 3.05 | 2.94 | 2.83 | 3.00 | 2.86 | 2.98 | 3.67 | 3.59 | 2.86 | 3.27 | 3.13 | 3.17 | 2.92 | 2.73 | 2.75 |
| | | | | | | | a | a | a | | | | | adf | ad | | | | cd | | | | |
| Standard deviation | | 1.27 | 1.29 | 1.23 | 1.26 | 1.28 | 1.12 | 1.36 | 1.29 | 1.26 | 1.32 | 1.26 | 1.27 | 1.30 | 1.24 | 1.04 | 1.25 | 1.24 | 1.26 | 1.28 | 1.30 | 1.25 | 1.24 |
| Standard error | | .05 | .06 | .09 | .07 | .07 | .09 | .12 | .12 | .09 | .14 | .09 | .08 | .07 | .21 | .18 | .09 | .20 | .14 | .13 | .13 | .15 | .16 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q5_7. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Identifying beneficial owners

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|---------------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 592 100% | 390 100% | 202 100% | 293 100% | 299 100% | 152 100% | 144 100% | 107 100% | 189 100% | 86 100% | 221 100% | 262 100% | 361 100% | 35 100% | 33 100% | 178 100% | 37 100% | 85 100% | 103 100% | 101 100% | 68 100% | 61 100% |
| Very concerned | (5.0) 69 12% | 47 12% | 22 11% | 38 13% | 31 10% | 7 5% | 23 16% | 15 14% | 24 13% | 11 13% | 31 14% | 26 10% | 41 11% | 9 26% | 6 18% | 21 12% | 10 27% | 14 16% | 16 16% | 11 11% | 4 6% | 5 8% |
| Fairly concerned | (4.0) 143 24% | 101 26% | 42 21% | 85 29% | 58 19% | 26 17% | 35 24% | 29 27% | 53 28% | 12 14% | 67 30% | 59 23% | 94 26% | 13 37% | 12 36% | 36 20% | 10 27% | 25 29% | 31 30% | 26 26% | 17 25% | 14 23% |
| Neutral | (3.0) 189 32% | 116 30% | 73 36% | 84 29% | 105 35% | 63 41% | 38 26% | 29 27% | 59 31% | 34 40% | 54 24% | 90 34% | 105 29% | 6 17% | 7 21% | 61 34% | 8 22% | 26 31% | 32 31% | 38 38% | 24 35% | 22 36% |
| Not very concerned | (2.0) 94 16% | 63 16% | 31 15% | 45 15% | 49 16% | 27 18% | 21 15% | 19 18% | 27 14% | 14 16% | 39 18% | 40 15% | 63 17% | 5 14% | 4 12% | 33 19% | 6 16% | 6 7% | 15 15% | 12 12% | 13 19% | 8 13% |
| Not at all concerned | (1.0) 97 16% | 63 16% | 34 17% | 41 14% | 56 19% | 29 19% | 27 19% | 15 14% | 26 14% | 15 17% | 30 14% | 47 18% | 58 16% | 2 6% | 4 12% | 27 15% | 3 8% | 14 16% | 9 9% | 14 14% | 10 15% | 12 20% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 212 36% | 148 38% | 64 32% | 123 42% | 89 30% | 33 22% | 58 40% | 44 41% | 77 41% | 23 27% | 98 44% | 85 32% | 135 37% | 22 63% | 18 55% | 57 32% | 20 54% | 39 46% | 47 46% | 37 37% | 21 31% | 19 31% |
| Net: Not concerned | 191 32% | 126 32% | 65 32% | 86 29% | 105 35% | 56 37% | 48 33% | 34 32% | 53 28% | 29 34% | 69 31% | 87 33% | 121 34% | 7 20% | 8 24% | 60 34% | 9 24% | 20 24% | 24 23% | 26 26% | 23 34% | 20 33% |
| Mean score | 2.99 | 3.02 | 2.94 | 3.12 b | 2.86 | 2.70 | 3.04 a | 3.09 a | 3.12 a | 2.88 | 3.14 c | 2.91 | 2.99 | 3.63 ad | 3.36 | 2.95 | 3.49 ad | 3.22 | 3.29 cd | 3.08 | 2.88 | 2.87 |
| Standard deviation | 1.23 | 1.25 | 1.21 | 1.23 | 1.23 | 1.10 | 1.34 | 1.26 | 1.21 | 1.23 | 1.25 | 1.22 | 1.24 | 1.19 | 1.27 | 1.21 | 1.28 | 1.29 | 1.16 | 1.17 | 1.13 | 1.22 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .09 | .11 | .12 | .09 | .13 | .08 | .08 | .07 | .20 | .22 | .09 | .21 | .14 | .11 | .12 | .14 | .16 |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_8. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Implementing a risk based approach

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 612 | 402 | 210 | 305 | 307 | 155 | 144 | 109 | 203 | 86 | 223 | 276 | 371 | 36 | 33 | 185 | 37 | 87 | 104 | 105 | 69 | 67 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Very concerned | 81 | 53 | 28 | 42 | 39 | 9 | 29 | 17 | 26 | 9 | 43 | 27 | 51 | 11 | 5 | 24 | 7 | 16 | 19 | 16 | 9 | 7 |
| | 13% | 13% | 13% | 14% | 13% | 6% | 20% | 16% | 13% | 10% | 19% | 10% | 14% | 31% | 15% | 13% | 19% | 18% | 18% | 15% | 13% | 10% |
| | | | | | | | a | a | a | | c | | | ad | | | | | | | | |
| Fairly concerned | 179 | 117 | 62 | 105 | 74 | 39 | 40 | 34 | 66 | 18 | 69 | 87 | 115 | 13 | 15 | 59 | 14 | 25 | 37 | 34 | 18 | 15 |
| | 29% | 29% | 30% | 34% | 24% | 25% | 28% | 31% | 33% | 21% | 31% | 32% | 31% | 36% | 45% | 32% | 38% | 29% | 36% | 32% | 26% | 22% |
| | | | | b | | | | | | | | | | | | | | | | | | |
| Neutral | 171 | 111 | 60 | 73 | 98 | 55 | 36 | 23 | 57 | 29 | 52 | 81 | 93 | 5 | 7 | 50 | 8 | 25 | 21 | 31 | 17 | 22 |
| | 28% | 28% | 29% | 24% | 32% | 35% | 25% | 21% | 28% | 34% | 23% | 29% | 25% | 14% | 21% | 27% | 22% | 29% | 20% | 30% | 25% | 33% |
| | | | | a | | bc | | | | | | | | | | | | | | | | |
| Not very concerned | 93 | 64 | 29 | 49 | 44 | 26 | 20 | 19 | 27 | 14 | 33 | 40 | 60 | 4 | 3 | 28 | 5 | 9 | 15 | 13 | 14 | 9 |
| | 15% | 16% | 14% | 16% | 14% | 17% | 14% | 17% | 13% | 16% | 15% | 14% | 16% | 11% | 9% | 15% | 14% | 10% | 14% | 12% | 20% | 13% |
| Not at all concerned | 88 | 57 | 31 | 36 | 52 | 26 | 19 | 16 | 27 | 16 | 26 | 41 | 52 | 3 | 3 | 24 | 3 | 12 | 12 | 11 | 11 | 14 |
| | 14% | 14% | 15% | 12% | 17% | 17% | 13% | 15% | 13% | 19% | 12% | 15% | 14% | 8% | 9% | 13% | 8% | 14% | 12% | 10% | 16% | 21% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 260 | 170 | 90 | 147 | 113 | 48 | 69 | 51 | 92 | 27 | 112 | 114 | 166 | 24 | 20 | 83 | 21 | 41 | 56 | 50 | 27 | 22 |
| | 42% | 42% | 43% | 48% | 37% | 31% | 48% | 47% | 45% | 31% | 50% | 41% | 45% | 67% | 61% | 45% | 57% | 47% | 54% | 48% | 39% | 33% |
| | | | | b | | | a | a | a | | ac | | | ad | | | | | d | | | |
| Net: Not concerned | 181 | 121 | 60 | 85 | 96 | 52 | 39 | 35 | 54 | 30 | 59 | 81 | 112 | 7 | 6 | 52 | 8 | 21 | 27 | 24 | 25 | 23 |
| | 30% | 30% | 29% | 28% | 31% | 34% | 27% | 32% | 27% | 35% | 26% | 29% | 30% | 19% | 18% | 28% | 22% | 24% | 26% | 23% | 36% | 34% |
| Mean score | 3.12 | 3.11 | 3.13 | 3.22 | 3.01 | 2.86 | 3.28 | 3.16 | 3.18 | 2.88 | 3.31 | 3.07 | 3.14 | 3.69 | 3.48 | 3.17 | 3.46 | 3.28 | 3.35 | 3.30 | 3.00 | 2.88 |
| | | | | b | | | a | a | a | | ac | | | ad | | | | | d | d | | |
| Standard deviation | 1.24 | 1.24 | 1.24 | 1.22 | 1.25 | 1.15 | 1.30 | 1.30 | 1.22 | 1.24 | 1.27 | 1.20 | 1.25 | 1.26 | 1.15 | 1.22 | 1.19 | 1.27 | 1.26 | 1.18 | 1.28 | 1.27 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .09 | .11 | .12 | .09 | .13 | .08 | .07 | .06 | .21 | .20 | .09 | .20 | .14 | .12 | .12 | .15 | .16 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q5_9. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Adverse media checks

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|-------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 603 | 396 | 207 | 298 | 305 | 154 | 142 | 109 | 197 | 84 | 223 | 271 | 367 | 36 | 33 | 182 | 37 | 85 | 103 | 104 | 68 | 66 | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | |
| Very concerned | (5.0) | 71 | 51 | 20 | 43 | 28 | 9 | 22 | 18 | 22 | 9 | 31 | 29 | 51 | 12 | 10 | 24 | 9 | 11 | 12 | 16 | 8 | 8 |
| | | 12% | 13% | 10% | 14% | 9% | 6% | 15% | 17% | 11% | 11% | 14% | 11% | 14% | 33% | 30% | 13% | 24% | 13% | 12% | 15% | 12% | 12% |
| | | | | | b | a | | a | | | | | | adf | adf | | | | | | | | |
| Fairly concerned | (4.0) | 148 | 97 | 51 | 83 | 65 | 32 | 34 | 31 | 50 | 15 | 62 | 65 | 94 | 9 | 9 | 45 | 8 | 24 | 31 | 15 | 15 | 18 |
| | | 25% | 24% | 25% | 28% | 21% | 21% | 24% | 28% | 25% | 18% | 28% | 24% | 26% | 25% | 27% | 25% | 22% | 28% | 30% | 14% | 22% | 27% |
| | | | | | b | | | | | | | | | | | | | | b | | | b | |
| Neutral | (3.0) | 163 | 110 | 53 | 75 | 88 | 50 | 38 | 26 | 49 | 27 | 54 | 72 | 95 | 7 | 7 | 46 | 11 | 22 | 26 | 38 | 19 | 13 |
| | | 27% | 28% | 26% | 25% | 29% | 32% | 27% | 24% | 25% | 32% | 24% | 27% | 26% | 19% | 21% | 25% | 30% | 26% | 25% | 37% | 28% | 20% |
| | | | | | | | | | | | | | | | | | | | | d | | | |
| Not very concerned | (2.0) | 109 | 64 | 45 | 53 | 56 | 28 | 24 | 18 | 39 | 14 | 43 | 51 | 62 | 6 | 5 | 39 | 6 | 13 | 19 | 15 | 14 | 10 |
| | | 18% | 16% | 22% | 18% | 18% | 18% | 17% | 17% | 20% | 17% | 19% | 19% | 17% | 17% | 15% | 21% | 16% | 15% | 18% | 14% | 21% | 15% |
| Not at all concerned | (1.0) | 112 | 74 | 38 | 44 | 68 | 35 | 24 | 16 | 37 | 19 | 33 | 54 | 65 | 2 | 2 | 28 | 3 | 15 | 15 | 20 | 12 | 17 |
| | | 19% | 19% | 18% | 15% | 22% | 23% | 17% | 15% | 19% | 23% | 15% | 20% | 18% | 6% | 6% | 15% | 8% | 18% | 15% | 19% | 18% | 26% |
| | | | | | a | | | | | | | | | | | | | | | | | | |
| NETS | | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | | 219 | 148 | 71 | 126 | 93 | 41 | 56 | 49 | 72 | 24 | 93 | 94 | 145 | 21 | 19 | 69 | 17 | 35 | 43 | 31 | 23 | 26 |
| | | 36% | 37% | 34% | 42% | 30% | 27% | 39% | 45% | 37% | 29% | 42% | 35% | 40% | 58% | 58% | 38% | 46% | 41% | 42% | 30% | 34% | 39% |
| | | | | | b | a | | a | a | | a | | | ad | ad | | | | | | | | |
| Net: Not concerned | | 221 | 138 | 83 | 97 | 124 | 63 | 48 | 34 | 76 | 33 | 76 | 105 | 127 | 8 | 7 | 67 | 9 | 28 | 34 | 35 | 26 | 27 |
| | | 37% | 35% | 40% | 33% | 41% | 41% | 34% | 31% | 39% | 39% | 34% | 39% | 35% | 22% | 21% | 37% | 24% | 33% | 33% | 34% | 38% | 41% |
| | | | | | a | | | | | | | | | | | | | | | | | | |
| Mean score | | 2.93 | 2.97 | 2.86 | 3.09 | 2.77 | 2.69 | 3.04 | 3.16 | 2.90 | 2.77 | 3.07 | 2.87 | 3.01 | 3.64 | 3.61 | 2.99 | 3.38 | 3.04 | 3.06 | 2.92 | 2.90 | 2.85 |
| | | | | | b | a | | a | | | | | | adf | adf | | | | | | | | |
| Standard deviation | | 1.28 | 1.29 | 1.25 | 1.27 | 1.27 | 1.20 | 1.31 | 1.30 | 1.28 | 1.28 | 1.27 | 1.28 | 1.30 | 1.27 | 1.25 | 1.27 | 1.26 | 1.30 | 1.24 | 1.30 | 1.27 | 1.39 |
| Standard error | | .05 | .06 | .09 | .07 | .07 | .10 | .11 | .12 | .09 | .14 | .09 | .08 | .07 | .21 | .22 | .09 | .21 | .14 | .12 | .13 | .15 | .17 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q5_10. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Training

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 611 100% | 401 100% | 210 100% | 304 100% | 307 100% | 155 100% | 144 100% | 109 100% | 202 100% | 86 100% | 224 100% | 275 100% | 370 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 66 100% |
| Very concerned (5.0) | 100 16% | 75 19% | 25 12% | 57 19% | 43 14% | 13 8% | 33 23% | 19 17% | 34 17% | 9 10% | 51 23% | 36 13% | 72 19% | 14 39% | 9 26% | 25 14% | 9 24% | 16 18% | 22 21% | 20 19% | 6 9% | 12 18% |
| Fairly concerned (4.0) | 185 30% | 118 29% | 67 32% | 99 33% | 86 28% | 33 21% | 45 31% | 37 34% | 70 35% | 20 23% | 62 28% | 95 35% | 109 29% | 11 31% | 11 32% | 58 31% | 13 35% | 28 32% | 31 30% | 28 27% | 25 36% | 21 32% |
| Neutral (3.0) | 176 29% | 115 29% | 61 29% | 79 26% | 97 32% | 63 41% | 35 24% | 25 23% | 53 26% | 31 36% | 59 26% | 77 28% | 100 27% | 4 11% | 7 21% | 52 28% | 9 24% | 25 29% | 28 27% | 34 32% | 16 23% | 19 29% |
| Not very concerned (2.0) | 78 13% | 51 13% | 27 13% | 34 11% | 44 14% | 28 18% | 16 11% | 13 12% | 21 10% | 15 17% | 30 13% | 32 12% | 49 13% | 3 8% | 3 9% | 26 14% | 5 14% | 9 10% | 12 12% | 15 14% | 13 19% | 2 3% |
| Not at all concerned (1.0) | 72 12% | 42 10% | 30 14% | 35 12% | 37 12% | 18 12% | 15 10% | 15 14% | 24 12% | 11 13% | 22 10% | 35 13% | 40 11% | 4 11% | 4 12% | 24 13% | 1 3% | 9 10% | 11 11% | 8 8% | 9 13% | 12 18% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 285 47% | 193 48% | 92 44% | 156 51% | 129 42% | 46 30% | 78 54% | 56 51% | 104 51% | 29 34% | 113 50% | 131 48% | 181 49% | 25 69% | 20 59% | 83 45% | 22 59% | 44 51% | 53 51% | 48 46% | 31 45% | 33 50% |
| Net: Not concerned | 150 25% | 93 23% | 57 27% | 69 23% | 81 26% | 46 30% | 31 22% | 28 26% | 45 22% | 26 30% | 52 23% | 67 24% | 89 24% | 7 19% | 7 21% | 50 27% | 6 16% | 18 21% | 23 22% | 23 22% | 22 32% | 14 21% |
| Mean score | 3.27 | 3.33 | 3.14 | 3.36 | 3.18 | 2.97 | 3.45 | 3.29 | 3.34 | 3.01 | 3.40 | 3.24 | 3.34 | 3.78 | 3.53 | 3.18 | 3.65 | 3.38 | 3.39 | 3.35 | 3.09 | 3.29 |
| Standard deviation | 1.22 | 1.22 | 1.22 | 1.23 | 1.20 | 1.10 | 1.25 | 1.28 | 1.22 | 1.16 | 1.25 | 1.20 | 1.24 | 1.35 | 1.31 | 1.22 | 1.09 | 1.20 | 1.24 | 1.17 | 1.20 | 1.32 |
| Standard error | .05 | .06 | .08 | .07 | .07 | .09 | .10 | .12 | .09 | .13 | .08 | .07 | .06 | .23 | .22 | .09 | .18 | .13 | .12 | .11 | .14 | .16 |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q5_11. How concerned, if at all, are you about the impact of any of the following on your business in the next 6 months?

Environmental and Social Governance

Base: All respondents (excluding don't know)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|---------------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 606 100% | 400 100% | 206 100% | 302 100% | 304 100% | 155 100% | 142 100% | 109 100% | 199 100% | 85 100% | 223 100% | 272 100% | 368 100% | 35 100% | 33 100% | 182 100% | 37 100% | 87 100% | 103 100% | 105 100% | 69 100% | 66 100% |
| Very concerned | (5.0) 97 16% | 65 16% | 32 16% | 54 18% | 43 14% | 16 10% | 30 21% | 22 20% | 29 15% | 12 14% | 41 18% | 41 15% | 64 17% | 12 34% | 12 36% | 26 14% | 11 30% | 18 21% | 17 17% | 12 11% | 11 16% | 10 15% |
| Fairly concerned | (4.0) 181 30% | 131 33% | 50 24% | 92 30% | 89 29% | 38 25% | 45 32% | 26 24% | 71 36% | 23 27% | 63 28% | 89 33% | 118 32% | 8 23% | 9 27% | 45 25% | 9 24% | 30 34% | 30 29% | 40 38% | 18 26% | 19 29% |
| Neutral | (3.0) 164 27% | 106 27% | 58 28% | 82 27% | 82 27% | 56 36% | 32 23% | 28 26% | 48 24% | 30 35% | 55 25% | 71 26% | 96 26% | 7 20% | 6 18% | 50 27% | 8 22% | 19 22% | 24 23% | 28 27% | 18 26% | 18 27% |
| Not very concerned | (2.0) 95 16% | 56 14% | 39 19% | 43 14% | 52 17% | 26 17% | 17 12% | 21 19% | 31 16% | 11 13% | 38 17% | 43 16% | 54 15% | 7 20% | 4 12% | 38 21% | 6 16% | 10 11% | 19 18% | 19 18% | 14 20% | 9 14% |
| Not at all concerned | (1.0) 69 11% | 42 11% | 27 13% | 31 10% | 38 13% | 19 12% | 18 13% | 12 11% | 20 10% | 9 11% | 26 12% | 28 10% | 36 10% | 1 3% | 2 6% | 23 13% | 3 8% | 10 11% | 13 13% | 6 6% | 8 12% | 10 15% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Concerned | 278 46% | 196 49% | 82 40% | 146 48% | 132 43% | 54 35% | 75 53% | 48 44% | 100 50% | 35 41% | 104 47% | 130 48% | 182 49% | 20 57% | 21 64% | 71 39% | 20 54% | 48 55% | 47 46% | 52 50% | 29 42% | 29 44% |
| Net: Not concerned | 164 27% | 98 25% | 66 32% | 74 25% | 90 30% | 45 29% | 35 25% | 33 30% | 51 26% | 20 24% | 64 29% | 71 26% | 90 24% | 8 23% | 6 18% | 61 34% | 9 24% | 20 23% | 32 31% | 25 24% | 22 32% | 19 29% |
| Mean score | 3.23 | 3.30 | 3.10 | 3.31 | 3.15 | 3.04 | 3.37 | 3.23 | 3.29 | 3.21 | 3.25 | 3.26 | 3.33 | 3.66 | 3.76 | 3.07 | 3.51 | 3.41 | 3.18 | 3.31 | 3.14 | 3.15 |
| Standard deviation | 1.22 | 1.20 | 1.25 | 1.22 | 1.23 | 1.15 | 1.29 | 1.28 | 1.19 | 1.17 | 1.27 | 1.20 | 1.20 | 1.24 | 1.25 | 1.24 | 1.30 | 1.26 | 1.27 | 1.08 | 1.25 | 1.28 |
| Standard error | .05 | .06 | .09 | .07 | .07 | .09 | .11 | .12 | .08 | .13 | .08 | .07 | .06 | .21 | .22 | .09 | .21 | .14 | .13 | .11 | .15 | .16 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q6_SUM. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

SUMMARY TABLE

Base: All respondents

| | Total | Barrier | Enabler | Don't know | Not applicable |
|--|-------------|------------|------------|------------|----------------|
| Laws and regulation | 617 100% | 162 26% | 358 58% | 75 12% | 22 4% |
| Generating internal buy-in | 617 100% | 100 16% | 362 59% | 82 13% | 73 12% |
| Developing and guiding policy and procedure (creating best practice) | 617 100% | 81 13% | 446 72% | 67 11% | 23 4% |
| Data management | 617 100% | 77 12% | 478 77% | 41 7% | 21 3% |
| Vendor management | 617 100% | 72 12% | 447 72% | 62 10% | 36 6% |
| Supplier spend analysis | 617 100% | 68 11% | 441 71% | 67 11% | 41 7% |
| Process management | 617 100% | 67 11% | 482 78% | 48 8% | 20 3% |
| Monitoring supplier performance | 617 100% | 64 10% | 463 75% | 51 8% | 39 6% |
| Market research and analysis | 617 100% | 54 9% | 472 76% | 53 9% | 38 6% |

Compliance and Procurement Sentiment - Wave 2

Q6_1. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Generating internal buy-in

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 100 | 71 | 29 | 66 | 34 | 14 | 23 | 19 | 44 | 8 | 39 | 50 | 73 | 9 | 8 | 31 | 7 | 13 | 23 | 14 | 11 | 10 |
| | 16% | 17% | 14% | 21% | 11% | 9% | 16% | 17% | 22% | 9% | 17% | 18% | 19% | 25% | 24% | 17% | 19% | 15% | 22% | 13% | 16% | 15% |
| | | | | b | a | | | a | a | | | a | | | | | | | | | | |
| Enabler | 362 | 228 | 134 | 170 | 192 | 86 | 83 | 68 | 125 | 48 | 131 | 165 | 206 | 20 | 17 | 116 | 22 | 58 | 66 | 64 | 40 | 42 |
| | 59% | 56% | 64% | 55% | 62% | 54% | 57% | 62% | 62% | 55% | 58% | 60% | 55% | 56% | 50% | 63% | 59% | 67% | 63% | 61% | 58% | 62% |
| | | | | | | | | | | | | | | | | | a | | | | | |
| Don't know | 82 | 59 | 23 | 37 | 45 | 27 | 24 | 13 | 18 | 9 | 39 | 30 | 55 | 5 | 8 | 20 | 5 | 10 | 10 | 15 | 11 | 7 |
| | 13% | 14% | 11% | 12% | 15% | 17% | 16% | 12% | 9% | 10% | 17% | 11% | 15% | 14% | 24% | 11% | 14% | 11% | 10% | 14% | 16% | 10% |
| | | | | d | d | d | d | d | c | | | c | | | d | | | | | | | |
| Not applicable | 73 | 49 | 24 | 35 | 38 | 31 | 16 | 9 | 16 | 22 | 16 | 31 | 42 | 2 | 1 | 18 | 3 | 6 | 5 | 12 | 7 | 9 |
| | 12% | 12% | 11% | 11% | 12% | 20% | 11% | 8% | 8% | 25% | 7% | 11% | 11% | 6% | 3% | 10% | 8% | 7% | 5% | 11% | 10% | 13% |
| | | | | | | bcd | | | | bc | | | | | | | | | | | | a |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_2. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Laws and regulation

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Barrier | 162 26% | 119 29% | 43 20% | 94 31% | 68 22% | 37 23% | 38 26% | 39 36% | 48 24% | 22 25% | 67 30% | 71 26% | 112 30% | 10 28% | 11 32% | 42 23% | 9 24% | 24 28% | 26 25% | 25 24% | 19 28% | 12 18% |
| Enabler | 358 58% | 222 55% | 136 65% | 175 57% | 183 59% | 87 55% | 79 54% | 60 55% | 131 65% | 47 54% | 127 56% | 160 58% | 208 55% | 22 61% | 15 44% | 117 63% | 24 65% | 50 57% | 64 62% | 66 63% | 40 58% | 46 68% |
| Don't know | 75 12% | 49 12% | 26 12% | 31 10% | 44 14% | 25 16% | 24 16% | 6 6% | 20 10% | 10 11% | 27 12% | 36 13% | 43 11% | 3 8% | 6 18% | 23 12% | 2 5% | 11 13% | 13 13% | 12 11% | 8 12% | 8 12% |
| Not applicable | 22 4% | 17 4% | 5 2% | 8 3% | 14 5% | 9 6% | 5 3% | 4 4% | 4 2% | 8 9% | 4 2% | 9 3% | 13 3% | 1 3% | 2 6% | 3 2% | 2 5% | 2 2% | 1 1% | 2 2% | 2 3% | 2 3% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_3. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Market research and analysis

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 54 | 38 | 16 | 30 | 24 | 7 | 17 | 14 | 16 | 4 | 25 | 22 | 35 | 5 | 7 | 16 | 4 | 10 | 10 | 8 | 5 | 6 |
| | 9% | 9% | 8% | 10% | 8% | 4% | 12% | 13% | 8% | 5% | 11% | 8% | 9% | 14% | 21% | 9% | 11% | 11% | 10% | 8% | 7% | 9% |
| | | | | | | | a | a | | | | | | | ad | | | | | | | |
| Enabler | 472 | 306 | 166 | 226 | 246 | 118 | 110 | 78 | 165 | 68 | 164 | 222 | 288 | 27 | 19 | 148 | 31 | 64 | 85 | 86 | 54 | 52 |
| | 76% | 75% | 79% | 73% | 80% | 75% | 75% | 72% | 81% | 78% | 73% | 80% | 77% | 75% | 56% | 80% | 84% | 74% | 82% | 82% | 78% | 76% |
| | | | | | | | | | c | | b | | c | | c | c | | | | | | |
| Don't know | 53 | 37 | 16 | 32 | 21 | 16 | 15 | 10 | 12 | 7 | 27 | 17 | 33 | 3 | 7 | 15 | 1 | 7 | 7 | 5 | 7 | 4 |
| | 9% | 9% | 8% | 10% | 7% | 10% | 10% | 9% | 6% | 8% | 12% | 6% | 9% | 8% | ade | 8% | 3% | 8% | 7% | 5% | 10% | 6% |
| | | | | | | | | | | | c | | | | | | | | | | | |
| Not applicable | 38 | 26 | 12 | 20 | 18 | 17 | 4 | 7 | 10 | 8 | 9 | 15 | 20 | 1 | 1 | 6 | 1 | 6 | 2 | 6 | 3 | 6 |
| | 6% | 6% | 6% | 6% | 6% | 11% | 3% | 6% | 5% | 9% | 4% | 5% | 5% | 3% | 3% | 3% | 3% | 7% | 2% | 6% | 4% | 9% |
| | | | | | | bd | | | | | | | | | | | | | | | | a |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_4. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Vendor management

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Barrier | 72 12% | 54 13% | 18 9% | 41 13% | 31 10% | 10 6% | 22 15% | 14 13% | 26 13% | 3 3% | 39 17% | 28 10% | 55 15% | 13 36% | 9 26% | 24 13% | 7 19% | 7 8% | 17 16% | 9 9% | 5 7% | 10 15% |
| Enabler | 447 72% | 285 70% | 162 77% | 208 68% | 239 77% | 112 71% | 105 72% | 81 74% | 148 73% | 63 72% | 160 71% | 206 75% | 262 70% | 19 53% | 18 53% | 140 76% | 26 70% | 67 77% | 79 76% | 84 80% | 50 72% | 47 69% |
| Don't know | 62 10% | 46 11% | 16 8% | 39 13% | 23 7% | 24 15% | 12 8% | 7 6% | 19 9% | 13 15% | 18 8% | 27 10% | 43 11% | 3 8% | 7 21% | 10 5% | 2 5% | 8 9% | 5 5% | 6 6% | 11 16% | 6 9% |
| Not applicable | 36 6% | 22 5% | 14 7% | 20 6% | 16 5% | 12 8% | 7 5% | 7 6% | 10 5% | 8 9% | 8 4% | 15 5% | 16 4% | 1 3% | - | 11 6% | 2 5% | 5 6% | 3 3% | 6 6% | 3 4% | 5 7% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_5. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Process management

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|----------|------|----------|------------|---------------|-----------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 67 | 51 | 16 | 35 | 32 | 16 | 19 | 15 | 17 | 5 | 37 | 23 | 45 | 7 | 5 | 19 | 8 | 11 | 15 | 12 | 6 | 10 |
| | 11% | 13% | 8% | 11% | 10% | 10% | 13% | 14% | 8% | 6% | 16% ac | 8% | 12% | 19% | 15% | 10% | 22% | 13% | 14% | 11% | 9% | 15% |
| Enabler | 482 | 306 | 176 | 236 | 246 | 111 | 116 | 85 | 169 | 64 | 166 | 232 | 287 | 24 | 22 | 153 | 25 | 69 | 79 | 87 | 56 | 50 |
| | 78% | 75% | 84% a | 77% | 80% | 70% | 79% | 78% | 83% a | 74% | 74% | 84% ab | 76% | 67% | 65% | 83% bce | 68% | 79% | 76% | 83% | 81% | 74% |
| Don't know | 48 | 36 | 12 | 29 | 19 | 21 | 8 | 7 | 12 | 10 | 16 | 18 | 34 | 5 | 6 | 9 | 3 | 4 | 10 | 5 | 5 | 6 |
| | 8% | 9% | 6% | 9% | 6% | 13% bd | 5% | 6% | 6% | 11% | 7% | 7% | 9% | 14% d | 18% df | 5% | 8% | 5% | 10% | 5% | 7% | 9% |
| Not applicable | 20 | 14 | 6 | 8 | 12 | 10 | 3 | 2 | 5 | 8 | 6 | 3 | 10 | - | 1 | 4 | 1 | 3 | - | 1 | 2 | 2 |
| | 3% | 3% | 3% | 3% | 4% | 6% | 2% | 2% | 2% | 9% bc | 3% | 1% | 3% | - | 3% | 2% | 3% | 3% | - | 1% 3% | 3% | 3% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_6. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Data management

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 77 | 55 | 22 | 45 | 32 | 16 | 21 | 16 | 24 | 9 | 33 | 31 | 53 | 10 | 8 | 21 | 5 | 12 | 18 | 14 | 7 | 7 |
| | 12% | 14% | 10% | 15% | 10% | 10% | 14% | 15% | 12% | 10% | 15% | 11% | 14% | 28% ad | 24% | 11% | 14% | 14% | 17% | 13% | 10% | 10% |
| Enabler | 478 | 308 | 170 | 230 | 248 | 121 | 111 | 81 | 164 | 66 | 166 | 225 | 287 | 22 | 21 | 148 | 28 | 64 | 77 | 84 | 57 | 53 |
| | 77% | 76% | 81% | 75% | 80% | 77% | 76% | 74% | 81% | 76% | 74% | 82% b | 76% b | 61% | 62% | 80% bc | 76% | 74% | 74% | 80% | 83% | 78% |
| Don't know | 41 | 30 | 11 | 22 | 19 | 12 | 10 | 10 | 9 | 5 | 20 | 14 | 27 | 3 | 5 | 11 | 1 | 6 | 7 | 5 | 4 | 5 |
| | 7% | 7% | 5% | 7% | 6% | 8% | 7% | 9% | 4% | 6% | 9% | 5% | 7% | 8% | 15% | 6% | 3% | 7% | 7% | 5% | 6% | 7% |
| Not applicable | 21 | 14 | 7 | 11 | 10 | 9 | 4 | 2 | 6 | 7 | 6 | 6 | 9 | 1 | - | 5 | 3 | 5 | 2 | 2 | 1 | 3 |
| | 3% | 3% | 3% | 4% | 3% | 6% | 3% | 2% | 3% | 8% bc | 3% | 2% | 2% | 3% | - | 3% | 8% a | 6% | 2% | 2% | 1% | 4% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_7. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Developing and guiding policy and procedure (creating best practice)

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 81 | 54 | 27 | 46 | 35 | 20 | 21 | 20 | 20 | 5 | 45 | 28 | 52 | 6 | 8 | 26 | 7 | 13 | 16 | 11 | 10 | 8 |
| | 13% | 13% | 13% | 15% | 11% | 13% | 14% | 18% | 10% | 6% | 20% | 10% | 14% | 17% | 24% | 14% | 19% | 15% | 15% | 10% | 14% | 12% |
| | | | | | | | | | | | | | | | | | | | | | | |
| Enabler | 446 | 295 | 151 | 222 | 224 | 97 | 109 | 74 | 165 | 63 | 148 | 216 | 274 | 25 | 22 | 130 | 25 | 66 | 75 | 80 | 48 | 51 |
| | 72% | 72% | 72% | 72% | 72% | 61% | 75% | 68% | 81% | 72% | 66% | 78% | 73% | 69% | 65% | 70% | 68% | 76% | 72% | 76% | 70% | 75% |
| | | | | | | | a | | ac | | | b | | | | | | | | | | |
| Don't know | 67 | 42 | 25 | 29 | 38 | 31 | 15 | 11 | 10 | 12 | 29 | 22 | 38 | 5 | 4 | 25 | 3 | 4 | 11 | 11 | 8 | 5 |
| | 11% | 10% | 12% | 9% | 12% | 20% | 10% | 10% | 5% | 14% | 13% | 8% | 10% | 14% | 12% | 14% | 8% | 5% | 11% | 10% | 12% | 7% |
| | | | | | | bcd | | | | | | | | | f | | | | | | | |
| Not applicable | 23 | 16 | 7 | 11 | 12 | 10 | 1 | 4 | 8 | 7 | 3 | 10 | 12 | - | - | 4 | 2 | 4 | 2 | 3 | 3 | 4 |
| | 4% | 4% | 3% | 4% | 4% | 6% | 1% | 4% | 4% | 8% | 1% | 4% | 3% | - | - | 2% | 5% | 5% | 2% | 3% | 4% | 6% |
| | | | | | | b | | | | b | | | | | | | | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_8. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Monitoring supplier performance

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 64 | 45 | 19 | 32 | 32 | 9 | 15 | 24 | 16 | 9 | 26 | 25 | 44 | 9 | 5 | 18 | 7 | 11 | 8 | 5 | 10 | 8 |
| | 10% | 11% | 9% | 10% | 10% | 6% | 10% | 22% | 8% | 10% | 12% | 9% | 12% | 25% | 15% | 10% | 19% | 13% | 8% | 5% | 14% | 12% |
| | | | | | | | | abd | | | | | | | | | | | | | | b |
| Enabler | 463 | 301 | 162 | 221 | 242 | 120 | 114 | 73 | 155 | 64 | 172 | 211 | 281 | 23 | 21 | 137 | 27 | 67 | 83 | 92 | 50 | 44 |
| | 75% | 74% | 77% | 72% | 78% | 76% | 78% | 67% | 76% | 74% | 76% | 76% | 75% | 64% | 62% | 74% | 73% | 77% | 80% | 88% | 72% | 65% |
| | | | | | | | | c | | | | | | | | | | | d | cd | | |
| Don't know | 51 | 36 | 15 | 30 | 21 | 18 | 10 | 6 | 17 | 5 | 19 | 23 | 32 | 2 | 6 | 17 | 1 | 5 | 10 | 5 | 5 | 8 |
| | 8% | 9% | 7% | 10% | 7% | 11% | 7% | 6% | 8% | 6% | 8% | 8% | 9% | 6% | 18% | 9% | 3% | 6% | 10% | 5% | 7% | 12% |
| | | | | | | | | | | | | | | | ef | | | | | | | |
| Not applicable | 39 | 25 | 14 | 25 | 14 | 11 | 7 | 6 | 15 | 9 | 8 | 17 | 19 | 2 | 2 | 13 | 2 | 4 | 3 | 3 | 4 | 8 |
| | 6% | 6% | 7% | 8% | 5% | 7% | 5% | 6% | 7% | 10% | 4% | 6% | 5% | 6% | 6% | 7% | 5% | 5% | 3% | 3% | 6% | 12% |
| | | | | | | | | | | b | | | | | | | | | | | | ab |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_9. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Supplier spend analysis

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 68 | 51 | 17 | 39 | 29 | 10 | 15 | 22 | 21 | 9 | 36 | 22 | 52 | 10 | 6 | 18 | 9 | 6 | 14 | 7 | 8 | 10 |
| | 11% | 13% | 8% | 13% | 9% | 6% | 10% | 20% | 10% | 10% | 16% | 8% | 14% | 28% | 18% | 10% | 24% | 7% | 13% | 7% | 12% | 15% |
| | | | | | | | | abd | | | c | | | adf | | df | | | | | | |
| Enabler | 441 | 283 | 158 | 207 | 234 | 115 | 110 | 71 | 144 | 58 | 156 | 211 | 259 | 22 | 21 | 138 | 24 | 70 | 78 | 87 | 45 | 39 |
| | 71% | 70% | 75% | 67% | 76% | 73% | 75% | 65% | 71% | 67% | 69% | 76% | 69% | 61% | 62% | 75% | 65% | 80% | 75% | 83% | 65% | 57% |
| | | | | | a | | | | | | | | | | | | abc | | d | cd | | |
| Don't know | 67 | 49 | 18 | 34 | 33 | 17 | 14 | 11 | 25 | 7 | 24 | 30 | 46 | 2 | 7 | 16 | 2 | 7 | 8 | 8 | 11 | 12 |
| | 11% | 12% | 9% | 11% | 11% | 11% | 10% | 10% | 12% | 8% | 11% | 11% | 12% | 6% | 21% | 9% | 5% | 8% | 8% | 8% | 16% | 18% |
| | | | | | | | | | | | | | | | d | | | | | | | ab |
| Not applicable | 41 | 24 | 17 | 28 | 13 | 16 | 7 | 5 | 13 | 13 | 9 | 13 | 19 | 2 | - | 13 | 2 | 4 | 4 | 3 | 5 | 7 |
| | 7% | 6% | 8% | 9% | 4% | 10% | 5% | 5% | 6% | 15% | 4% | 5% | 5% | 6% | - | 7% | 5% | 5% | 4% | 3% | 7% | 10% |
| | | | | b | | | | | | bc | | | | | | | | | | | | b |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q6_SUM. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

SUMMARY TABLE

Base: All respondents (excluding don't know or not applicable)

| | Total | Barrier | Enabler |
|--|-------------|------------|------------|
| Laws and regulation | 520 100% | 162 31% | 358 69% |
| Generating internal buy-in | 462 100% | 100 22% | 362 78% |
| Developing and guiding policy and procedure (creating best practice) | 527 100% | 81 15% | 446 85% |
| Data management | 555 100% | 77 14% | 478 86% |
| Vendor management | 519 100% | 72 14% | 447 86% |
| Supplier spend analysis | 509 100% | 68 13% | 441 87% |
| Process management | 549 100% | 67 12% | 482 88% |
| Monitoring supplier performance | 527 100% | 64 12% | 463 88% |
| Market research and analysis | 526 100% | 54 10% | 472 90% |

Compliance and Procurement Sentiment - Wave 2

Q6_1. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Generating internal buy-in

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | *b | *c | d | *e | f | a | b | c | d | |
| Total | 462 | 299 | 163 | 236 | 226 | 100 | 106 | 87 | 169 | 56 | 170 | 215 | 279 | 29 | 25 | 147 | 29 | 71 | 89 | 78 | 51 | 52 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 100 | 71 | 29 | 66 | 34 | 14 | 23 | 19 | 44 | 8 | 39 | 50 | 73 | 9 | 8 | 31 | 7 | 13 | 23 | 14 | 11 | 10 |
| | 22% | 24% | 18% | 28% | 15% | 14% | 22% | 22% | 26% | 14% | 23% | 23% | 26% | 31% | 32% | 21% | 24% | 18% | 26% | 18% | 22% | 19% |
| | | | | b | a | | | | a | | | | | | | | | | | | | |
| Enabler | 362 | 228 | 134 | 170 | 192 | 86 | 83 | 68 | 125 | 48 | 131 | 165 | 206 | 20 | 17 | 116 | 22 | 58 | 66 | 64 | 40 | 42 |
| | 78% | 76% | 82% | 72% | 85% | 86% | 78% | 78% | 74% | 86% | 77% | 77% | 74% | 69% | 68% | 79% | 76% | 82% | 74% | 82% | 78% | 81% |
| | | | | a | d | | | | d | | | | | | | | | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_2. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Laws and regulation

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 520 | 341 | 179 | 269 | 251 | 124 | 117 | 99 | 179 | 69 | 194 | 231 | 320 | 32 | 26 | 159 | 33 | 74 | 90 | 91 | 59 | 58 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 162 | 119 | 43 | 94 | 68 | 37 | 38 | 39 | 48 | 22 | 67 | 71 | 112 | 10 | 11 | 42 | 9 | 24 | 26 | 25 | 19 | 12 |
| | 31% | 35% | 24% | 35% | 27% | 30% | 32% | 39% | 27% | 32% | 35% | 31% | 35% | 31% | 42% | 26% | 27% | 32% | 29% | 27% | 32% | 21% |
| | | b | | | | | | d | | | | | | | | | | | | | | |
| Enabler | 358 | 222 | 136 | 175 | 183 | 87 | 79 | 60 | 131 | 47 | 127 | 160 | 208 | 22 | 15 | 117 | 24 | 50 | 64 | 66 | 40 | 46 |
| | 69% | 65% | 76% | 65% | 73% | 70% | 68% | 61% | 73% | 68% | 65% | 69% | 65% | 69% | 58% | 74% | 73% | 68% | 71% | 73% | 68% | 79% |
| | | a | | | | | | c | | | | | | | | | | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_3. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Market research and analysis

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 526 | 344 | 182 | 256 | 270 | 125 | 127 | 92 | 181 | 72 | 189 | 244 | 323 | 32 | 26 | 164 | 35 | 74 | 95 | 94 | 59 | 58 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 54 | 38 | 16 | 30 | 24 | 7 | 17 | 14 | 16 | 4 | 25 | 22 | 35 | 5 | 7 | 16 | 4 | 10 | 10 | 8 | 5 | 6 |
| | 10% | 11% | 9% | 12% | 9% | 6% | 13% | 15% | 9% | 6% | 13% | 9% | 11% | 16% | 27% | 10% | 11% | 14% | 11% | 9% | 8% | 10% |
| | | | | | | | a | a | | | | | | | | | | | | | | |
| Enabler | 472 | 306 | 166 | 226 | 246 | 118 | 110 | 78 | 165 | 68 | 164 | 222 | 288 | 27 | 19 | 148 | 31 | 64 | 85 | 86 | 54 | 52 |
| | 90% | 89% | 91% | 88% | 91% | 94% | 87% | 85% | 91% | 94% | 87% | 91% | 89% | 84% | 73% | 90% | 89% | 86% | 89% | 91% | 92% | 90% |
| | | | | | | bc | | | | | | | | | | | | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_4. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Vendor management

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 519 | 339 | 180 | 249 | 270 | 122 | 127 | 95 | 174 | 66 | 199 | 234 | 317 | 32 | 27 | 164 | 33 | 74 | 96 | 93 | 55 | 57 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 72 | 54 | 18 | 41 | 31 | 10 | 22 | 14 | 26 | 3 | 39 | 28 | 55 | 13 | 9 | 24 | 7 | 7 | 17 | 9 | 5 | 10 |
| | 14% | 16% | 10% | 16% | 11% | 8% | 17% | 15% | 15% | 5% | 20% | 12% | 17% | 41% | 33% | 15% | 21% | 9% | 18% | 10% | 9% | 18% |
| | | | | | | | a | | | | ac | | | adf | | | | | | | | |
| Enabler | 447 | 285 | 162 | 208 | 239 | 112 | 105 | 81 | 148 | 63 | 160 | 206 | 262 | 19 | 18 | 140 | 26 | 67 | 79 | 84 | 50 | 47 |
| | 86% | 84% | 90% | 84% | 89% | 92% | 83% | 85% | 85% | 95% | 80% | 88% | 83% | 59% | 67% | 85% | 79% | 91% | 82% | 90% | 91% | 82% |
| | | | | | | b | | | | b | | b | b | | b | | b | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_5. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Process management

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 549 | 357 | 192 | 271 | 278 | 127 | 135 | 100 | 186 | 69 | 203 | 255 | 332 | 31 | 27 | 172 | 33 | 80 | 94 | 99 | 62 | 60 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 67 | 51 | 16 | 35 | 32 | 16 | 19 | 15 | 17 | 5 | 37 | 23 | 45 | 7 | 5 | 19 | 8 | 11 | 15 | 12 | 6 | 10 |
| | 12% | 14% | 8% | 13% | 12% | 13% | 14% | 15% | 9% | 7% | 18% | 9% | 14% | 23% | 19% | 11% | 24% | 14% | 16% | 12% | 10% | 17% |
| | | b | | | | | | | | | ac | | | | | d | | | | | | |
| Enabler | 482 | 306 | 176 | 236 | 246 | 111 | 116 | 85 | 169 | 64 | 166 | 232 | 287 | 24 | 22 | 153 | 25 | 69 | 79 | 87 | 56 | 50 |
| | 88% | 86% | 92% | 87% | 88% | 87% | 86% | 85% | 91% | 93% | 82% | 91% | 86% | 77% | 81% | 89% | 76% | 86% | 84% | 88% | 90% | 83% |
| | | a | | | | | | | | b | b | | | | e | | | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_6. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Data management

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 555 | 363 | 192 | 275 | 280 | 137 | 132 | 97 | 188 | 75 | 199 | 256 | 340 | 32 | 29 | 169 | 33 | 76 | 95 | 98 | 64 | 60 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 77 | 55 | 22 | 45 | 32 | 16 | 21 | 16 | 24 | 9 | 33 | 31 | 53 | 10 | 8 | 21 | 5 | 12 | 18 | 14 | 7 | 7 |
| | 14% | 15% | 11% | 16% | 11% | 12% | 16% | 16% | 13% | 12% | 17% | 12% | 16% | 31% ad | 28% | 12% | 15% | 16% | 19% | 14% | 11% | 12% |
| Enabler | 478 | 308 | 170 | 230 | 248 | 121 | 111 | 81 | 164 | 66 | 166 | 225 | 287 | 22 | 21 | 148 | 28 | 64 | 77 | 84 | 57 | 53 |
| | 86% | 85% | 89% | 84% | 89% | 88% | 84% | 84% | 87% | 88% | 83% | 88% | 84% b | 69% | 72% | 88% b | 85% | 84% | 81% | 86% | 89% | 88% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_7. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Developing and guiding policy and procedure (creating best practice)

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 527 | 349 | 178 | 268 | 259 | 117 | 130 | 94 | 185 | 68 | 193 | 244 | 326 | 31 | 30 | 156 | 32 | 79 | 91 | 91 | 58 | 59 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 81 | 54 | 27 | 46 | 35 | 20 | 21 | 20 | 20 | 5 | 45 | 28 | 52 | 6 | 8 | 26 | 7 | 13 | 16 | 11 | 10 | 8 |
| | 15% | 15% | 15% | 17% | 14% | 17% | 16% | 21% | 11% | 7% | 23% | 11% | 16% | 19% | 27% | 17% | 22% | 16% | 18% | 12% | 17% | 14% |
| | | | | | | | | d | | | ac | | | | | | | | | | | |
| Enabler | 446 | 295 | 151 | 222 | 224 | 97 | 109 | 74 | 165 | 63 | 148 | 216 | 274 | 25 | 22 | 130 | 25 | 66 | 75 | 80 | 48 | 51 |
| | 85% | 85% | 85% | 83% | 86% | 83% | 84% | 79% | 89% | 93% | 77% | 89% | 84% | 81% | 73% | 83% | 78% | 84% | 82% | 88% | 83% | 86% |
| | | | | | | | | | c | | b | | | | | | | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_8. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Monitoring supplier performance

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 527 | 346 | 181 | 253 | 274 | 129 | 129 | 97 | 171 | 73 | 198 | 236 | 325 | 32 | 26 | 155 | 34 | 78 | 91 | 97 | 60 | 52 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 64 | 45 | 19 | 32 | 32 | 9 | 15 | 24 | 16 | 9 | 26 | 25 | 44 | 9 | 5 | 18 | 7 | 11 | 8 | 5 | 10 | 8 |
| | 12% | 13% | 10% | 13% | 12% | 7% | 12% | 25% | 9% | 12% | 13% | 11% | 14% | 28% | 19% | 12% | 21% | 14% | 9% | 5% | 17% | 15% |
| | | | | | | | | abd | | | | | | ad | | | | | | | b | b |
| Enabler | 463 | 301 | 162 | 221 | 242 | 120 | 114 | 73 | 155 | 64 | 172 | 211 | 281 | 23 | 21 | 137 | 27 | 67 | 83 | 92 | 50 | 44 |
| | 88% | 87% | 90% | 87% | 88% | 93% | 88% | 75% | 91% | 88% | 87% | 89% | 86% | 72% | 81% | 88% | 79% | 86% | 91% | 95% | 83% | 85% |
| | | | | | | c | c | | c | | | | b | | b | | | | | cd | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q6_9. In your opinion, do you think that technology is a barrier or an enabler to you doing each of the following duties and tasks?

Supplier spend analysis

Base: All respondents (excluding don't know or not applicable)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 509 | 334 | 175 | 246 | 263 | 125 | 125 | 93 | 165 | 67 | 192 | 233 | 311 | 32 | 27 | 156 | 33 | 76 | 92 | 94 | 53 | 49 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Barrier | 68 | 51 | 17 | 39 | 29 | 10 | 15 | 22 | 21 | 9 | 36 | 22 | 52 | 10 | 6 | 18 | 9 | 6 | 14 | 7 | 8 | 10 |
| | 13% | 15% | 10% | 16% | 11% | 8% | 12% | 24% | 13% | 13% | 19% | 9% | 17% | 31% | 22% | 12% | 27% | 8% | 15% | 7% | 15% | 20% |
| | | | | | | | | abd | | | c | | | adf | | df | | | | | | b |
| Enabler | 441 | 283 | 158 | 207 | 234 | 115 | 110 | 71 | 144 | 58 | 156 | 211 | 259 | 22 | 21 | 138 | 24 | 70 | 78 | 87 | 45 | 39 |
| | 87% | 85% | 90% | 84% | 89% | 92% | 88% | 76% | 87% | 87% | 81% | 91% | 83% | 69% | 78% | 88% | 73% | 92% | 85% | 93% | 85% | 80% |
| | | | | | | c | c | | c | | b | | b | | be | be | | | | d | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_1. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Generating internal buy-in

Base: All respondents who think technology is a barrier to generating internal buy-in

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 100 | 71 | 29 | 66 | 34 | 14 | 23 | 19 | 44 | 8 | 39 | 50 | 73 | 9 | 8 | 31 | 7 | 13 | 23 | 14 | 11 | 10 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Response not relevant/ Positive response/ Technology is not a barrier | 9 | 7 | 2 | 7 | 2 | 3 | 2 | 1 | 3 | - | 4 | 4 | 7 | 1 | - | 1 | - | 2 | 3 | 1 | 1 | - |
| | 9% | 10% | 7% | 11% | 6% | 21% | 9% | 5% | 7% | - | 10% | 8% | 10% | 11% | - | 3% | - | 15% | 13% | 7% | 9% | - |
| Requires technical understanding/skill/ computer knowledge | 7 | 6 | 1 | 4 | 3 | 1 | 2 | 1 | 3 | - | 1 | 6 | 6 | - | - | - | 1 | 1 | 2 | 2 | 1 | 1 |
| | 7% | 8% | 3% | 6% | 9% | 7% | 9% | 5% | 7% | - | 3% | 12% | 8% | - | - | - | 14% | 8% | 9% | 14% | 9% | 10% |
| Technology is useful/good/ Great help/ Makes work easier | 7 | 5 | 2 | 4 | 3 | - | 3 | 3 | 1 | 1 | 4 | 2 | 5 | 2 | 1 | 4 | 1 | - | 4 | - | 2 | - |
| | 7% | 7% | 7% | 6% | 9% | - | 13% | 16% | 2% | 13% | 10% | 4% | 7% | 22% | 13% | 13% | 14% | - | 17% | - | 18% | - |
| Harder/difficult/complex/ Confusing | 6 | 5 | 1 | 4 | 2 | 1 | - | 2 | 3 | 1 | 2 | 3 | 5 | 1 | - | 1 | - | 1 | - | - | - | 1 |
| | 6% | 7% | 3% | 6% | 6% | 7% | - | 11% | 7% | 13% | 5% | 6% | 7% | 11% | - | 3% | - | 8% | - | - | - | 10% |
| Costs/ Less cost effective | 6 | 2 | 4 | 3 | 3 | 1 | 1 | 1 | 3 | - | 5 | 1 | 2 | 1 | 1 | 3 | 1 | 2 | 1 | - | - | - |
| | 6% | 3% | 14% | 5% | 9% | 7% | 4% | 5% | 7% | - | 13% | 2% | 3% | 11% | 13% | 10% | 14% | 15% | 4% | - | - | - |
| Expensive/ Requires funding/finance/ Prohibitive costs | 6 | 4 | 2 | 3 | 3 | - | 1 | 2 | 3 | 1 | 2 | 3 | 4 | - | - | 2 | - | 2 | 2 | - | 2 | - |
| | 6% | 6% | 7% | 5% | 9% | - | 4% | 11% | 7% | 13% | 5% | 6% | 5% | - | - | 6% | - | 15% | 9% | - | 18% | - |
| Reliability issues | 5 | 2 | 3 | 4 | 1 | - | 3 | 1 | 1 | 1 | 2 | 2 | 4 | - | - | 3 | - | - | - | 1 | 1 | 1 |
| | 5% | 3% | 10% | 6% | 3% | - | 13% | 5% | 2% | 13% | 5% | 4% | 5% | - | - | 10% | - | - | - | 7% | 9% | 10% |
| Software issues/ System issues/failures | 4 | 2 | 2 | 2 | 2 | - | 1 | 1 | 2 | - | 1 | 3 | 1 | - | - | 2 | - | 1 | 1 | 1 | - | - |
| | 4% | 3% | 7% | 3% | 6% | - | 4% | 5% | 5% | - | 3% | 6% | 1% | - | - | 6% | - | 8% | 4% | 7% | - | - |
| Time taking/consuming | 3 | 2 | 1 | 2 | 1 | 1 | 1 | - | 1 | - | 1 | 1 | 3 | - | - | 1 | - | - | - | - | 1 | - |
| | 3% | 3% | 3% | 3% | 3% | 7% | 4% | - | 2% | - | 3% | 2% | 4% | - | - | 3% | - | - | - | - | 9% | - |
| Can slow down development/process/ Unproductive | 3 | 2 | 1 | 2 | 1 | 2 | - | 1 | - | 1 | 1 | 1 | 2 | 1 | - | 1 | - | - | 1 | - | - | - |
| | 3% | 3% | 3% | 3% | 3% | 14% | - | 5% | - | 13% | 3% | 2% | 3% | 11% | - | 3% | - | - | 4% | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_1. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Generating internal buy-in

Base: All respondents who think technology is a barrier to generating internal buy-in

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 100 | 71 | 29 | 66 | 34 | 14 | 23 | 19 | 44 | 8 | 39 | 50 | 73 | 9 | 8 | 31 | 7 | 13 | 23 | 14 | 11 | 10 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Unnecessary/ Added work/burden/ Superfluous | 3 | 2 | 1 | 3 | - | - | - | 1 | 2 | - | 1 | 2 | 1 | 1 | - | 1 | - | 1 | - | 1 | - | 1 |
| | 3% | 3% | 3% | 5% | - | - | - | 5% | 5% | - | 3% | 4% | 1% | 11% | - | 3% | - | 8% | - | 7% | - | 10% |
| Distracts/ People get too busy with social media, tech projects etc. | 3 | 2 | 1 | 2 | 1 | - | 1 | - | 2 | - | - | 3 | 3 | 1 | - | 2 | - | - | - | 1 | - | - |
| | 3% | 3% | 3% | 3% | 3% | - | 4% | - | 5% | - | - | 6% | 4% | 11% | - | 6% | - | - | - | 7% | - | - |
| Availability of technology/equipments | 3 | 3 | - | 2 | 1 | - | - | 2 | 1 | - | 1 | 2 | 3 | - | - | - | - | - | - | - | - | 1 |
| | 3% | 4% | - | 3% | 3% | - | - | 11% | 2% | - | 3% | 4% | 4% | - | - | - | - | - | - | - | - | 10% |
| Resistance to new technology/software/ No software support | 3 | 2 | 1 | 3 | - | - | 1 | 2 | - | - | 3 | - | 2 | - | 1 | 2 | - | - | 1 | 1 | - | - |
| | 3% | 3% | 3% | 5% | - | - | 4% | 11% | - | - | 8% | - | 3% | - | 13% | 6% | - | - | 4% | 7% | - | - |
| Bureaucracy | 3 | 1 | 2 | 1 | 2 | - | - | 1 | 2 | - | 1 | 2 | 2 | - | - | 2 | - | - | - | 1 | 2 | - |
| | 3% | 1% | 7% | 2% | 6% | - | - | 5% | 5% | - | 3% | 4% | 3% | - | - | 6% | - | - | - | 7% | 18% | - |
| Too much enforcements/ Regulations/ Constraints | 2 | 2 | - | 1 | 1 | - | 1 | - | 1 | - | 1 | 1 | 2 | - | 1 | - | - | - | - | 1 | - | - |
| | 2% | 3% | - | 2% | 3% | - | 4% | - | 2% | - | 3% | 2% | 3% | - | 13% | - | - | - | - | 7% | - | - |
| Safety concerns/ Security risks/ Weak security | 2 | 2 | - | 1 | 1 | - | 1 | - | 1 | - | 1 | 1 | 1 | - | - | - | - | 1 | - | - | - | 1 |
| | 2% | 3% | - | 2% | 3% | - | 4% | - | 2% | - | 3% | 2% | 1% | - | - | - | - | 8% | - | - | - | 10% |
| Can't be humanly controlled/ Less human engagement/ Human does better | 2 | 2 | - | 1 | 1 | - | - | - | 2 | - | - | 2 | 2 | - | - | - | - | - | - | - | 1 | - |
| | 2% | 3% | - | 2% | 3% | - | - | - | 5% | - | - | 4% | 3% | - | - | - | - | - | - | - | 9% | - |
| Need for more buy in | 2 | 2 | - | 2 | - | 1 | - | - | 1 | 1 | - | 1 | 2 | - | - | - | - | - | 1 | - | - | - |
| | 2% | 3% | - | 3% | - | 7% | - | - | 2% | 13% | - | 2% | 3% | - | - | - | - | - | 4% | - | - | - |
| Technology is a barrier/rigid/non-flexible | 2 | 1 | 1 | 2 | - | - | - | - | 2 | - | - | 2 | 1 | - | - | - | - | 1 | - | - | - | 1 |
| | 2% | 1% | 3% | 3% | - | - | - | - | 5% | - | - | 4% | 1% | - | - | - | - | 8% | - | - | - | 10% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_1. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Generating internal buy-in

Base: All respondents who think technology is a barrier to generating internal buy-in

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 100 | 71 | 29 | 66 | 34 | 14 | 23 | 19 | 44 | 8 | 39 | 50 | 73 | 9 | 8 | 31 | 7 | 13 | 23 | 14 | 11 | 10 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Adaptability issues | 2 | 2 | - | 1 | 1 | - | - | - | 2 | - | 1 | 1 | 1 | - | 1 | - | - | 1 | - | - | - | 1 |
| | 2% | 3% | - | 2% | 3% | - | - | - | 5% | - | 3% | 2% | 1% | - | 13% | - | - | 8% | - | - | - | 10% |
| Not suitable/ Inconvenient | 2 | 2 | - | 2 | - | - | 1 | - | 1 | - | 2 | - | 2 | - | - | - | 1 | - | 2 | - | - | - |
| | 2% | 3% | - | 3% | - | - | 4% | - | 2% | - | 5% | - | 3% | - | - | - | 14% | - | 9% | - | - | - |
| Advanced technologies like AI/ Automation | 2 | 2 | - | 1 | 1 | - | 1 | - | 1 | - | 1 | 1 | 2 | - | - | - | - | - | - | 1 | 1 | - |
| | 2% | 3% | - | 2% | 3% | - | 4% | - | 2% | - | 3% | 2% | 3% | - | - | - | - | - | - | 7% | 9% | - |
| Threat to people's jobs | 2 | 1 | 1 | 2 | - | - | - | 1 | 1 | - | 1 | 1 | 1 | - | 1 | 1 | - | - | 1 | - | - | - |
| | 2% | 1% | 3% | 3% | - | - | - | 5% | 2% | - | 3% | 2% | 1% | - | 13% | 3% | - | - | 4% | - | - | - |
| Risky | 2 | 1 | 1 | 2 | - | - | - | 1 | 1 | - | 2 | - | 1 | - | - | 2 | 1 | - | - | - | - | - |
| | 2% | 1% | 3% | 3% | - | - | - | 5% | 2% | - | 5% | - | 1% | - | - | 6% | 14% | - | - | - | - | - |
| Not popular/interesting/ No interest | 2 | 2 | - | 1 | 1 | 1 | 1 | - | - | - | 2 | - | 2 | - | - | - | - | - | 1 | - | - | - |
| | 2% | 3% | - | 2% | 3% | 7% | 4% | - | - | - | 5% | - | 3% | - | - | - | - | - | 4% | - | - | - |
| Availability/lack of resources/infrastructure | 2 | 2 | - | 1 | 1 | - | - | - | 2 | - | - | 2 | 2 | - | - | 1 | - | - | 1 | - | - | - |
| | 2% | 3% | - | 2% | 3% | - | - | - | 5% | - | - | 4% | 3% | - | - | 3% | - | - | 4% | - | - | - |
| Tech giants like Microsoft, Google, HPE etc. | 2 | 2 | - | 1 | 1 | - | 1 | - | 1 | - | - | 2 | 2 | - | - | 1 | 1 | - | - | - | - | - |
| | 2% | 3% | - | 2% | 3% | - | 4% | - | 2% | - | - | 4% | 3% | - | - | 3% | 14% | - | - | - | - | - |
| Limitations/ Can be limiting/ Not helping much | 1 | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 1% | - | 2% | - | - | - | 5% | - | - | 3% | - | 1% | - | - | - | - | - | - | - | - | - |
| Constantly updating/ Changes too rapidly/ Data changes | 1 | 1 | - | 1 | - | - | - | - | 1 | - | - | 1 | 1 | - | 1 | - | - | - | 1 | - | - | - |
| | 1% | 1% | - | 2% | - | - | - | - | 2% | - | - | 2% | 1% | - | 13% | - | - | - | 4% | - | - | - |
| Interrupting/ Inhibiting/ Makes job difficult | 1 | 1 | - | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 1% | - | 2% | - | 7% | - | - | - | 13% | - | - | 1% | - | - | - | - | - | - | - | - | - |
| Malicious/ Invasive/ Scams | 1 | 1 | - | - | 1 | 1 | - | - | - | 1 | - | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 1% | - | - | 3% | 7% | - | - | - | 13% | - | - | 1% | - | - | - | - | - | - | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_1. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Generating internal buy-in

Base: All respondents who think technology is a barrier to generating internal buy-in

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | *b | *c | d | *a | b | c | a | *b | *c | d | *e | *f | *a | *b | *c | *d | |
| Total | 100 | 71 | 29 | 66 | 34 | 14 | 23 | 19 | 44 | 8 | 39 | 50 | 73 | 9 | 8 | 31 | 7 | 13 | 23 | 14 | 11 | 10 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Need for quality/trained staff/employees/ Because of less staff | 1 | - | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | - | - | 1 | - | - | - | - | - | 1 |
| | 1% | - | 3% | - | 3% | - | - | - | 2% | - | - | 2% | - | - | - | 3% | - | - | - | - | - | 10% |
| No opinion/ No specific reason/ No comments/ Refused/ Prefer not to say | 1 | - | 1 | 1 | - | 1 | - | - | - | - | - | - | - | - | - | 1 | - | - | 1 | - | - | - |
| | 1% | - | 3% | 2% | - | 7% | - | - | - | - | - | - | - | - | - | 3% | - | - | 4% | - | - | - |
| Don't know | 3 | 1 | 2 | 3 | - | - | 1 | 1 | 1 | - | 2 | 1 | 2 | 1 | 1 | 2 | 1 | - | - | 2 | - | - |
| | 3% | 1% | 7% | 5% | - | - | 4% | 5% | 2% | - | 5% | 2% | 3% | 11% | 13% | 6% | 14% | - | - | 14% | - | - |
| Not applicable/ N/A/ None | 4 | 1 | 3 | 3 | 1 | - | 1 | 1 | 2 | - | 1 | 3 | 2 | - | - | 2 | - | 1 | 2 | 1 | - | 1 |
| | 4% | 1% | 10% | 5% | 3% | - | 4% | 5% | 5% | - | 3% | 6% | 3% | - | - | 6% | - | 8% | 9% | 7% | - | 10% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_2. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Laws and regulation

Base: All respondents who think technology is a barrier to laws and regulation

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|---------|----------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | *a | b | c | a | *b | *c | d | *e | *f | *a | *b | *c | *d |
| Total | 162 | 119 | 43 | 94 | 68 | 37 | 38 | 39 | 48 | 22 | 67 | 71 | 112 | 10 | 11 | 42 | 9 | 24 | 26 | 25 | 19 | 12 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Too much enforcements/ Regulations/ Constrains | 21 | 16 | 5 | 7 | 14 | 6 | 5 | 3 | 7 | 4 | 8 | 8 | 14 | - | 1 | 5 | 1 | 2 | 2 | 3 | 2 | 3 |
| | 13% | 13% | 12% | 7% | 21% a | 16% | 13% | 8% | 15% | 18% | 12% | 11% | 13% | - | 9% | 12% | 11% | 8% | 8% | 12% | 11% | 25% |
| Harder/difficult/complex/ Confusing | 13 | 10 | 3 | 7 | 6 | 3 | 3 | 3 | 4 | 1 | 8 | 4 | 11 | 1 | - | 3 | - | 1 | 2 | 2 | 2 | - |
| | 8% | 8% | 7% | 7% | 9% | 8% | 8% | 8% | 8% | 5% | 12% | 6% | 10% | 10% | - | 7% | - | 4% | 8% | 8% | 11% | - |
| Limitations/ Can be limiting/ Not helping much | 10 | 7 | 3 | 5 | 5 | 3 | 1 | 3 | 3 | 3 | 3 | 4 | 8 | - | - | 2 | - | 1 | 3 | - | 1 | 1 |
| | 6% | 6% | 7% | 5% | 7% | 8% | 3% | 8% | 6% | 14% | 4% | 6% | 7% | - | - | 5% | - | 4% | 12% | - | 5% | 8% |
| Can slow down development/process/ Unproductive | 9 | 7 | 2 | 3 | 6 | 2 | 4 | 1 | 2 | 1 | 4 | 4 | 8 | 1 | 2 | 1 | 1 | - | - | 3 | - | 1 |
| | 6% | 6% | 5% | 3% | 9% | 5% | 11% | 3% | 4% | 5% | 6% | 6% | 7% | 10% | 18% | 2% | 11% | - | - | 12% | - | 8% |
| Compliance | 8 | 7 | 1 | 4 | 4 | 1 | 4 | - | 3 | - | 4 | 4 | 5 | - | 1 | - | - | 3 | 2 | 1 | - | - |
| | 5% | 6% | 2% | 4% | 6% | 3% | 11% c | - | 6% | - | 6% | 6% | 4% | - | 9% | - | - | 13% | 8% | 4% | - | - |
| Keeping up to date/ Keeping up with changes | 8 | 6 | 2 | 5 | 3 | 3 | 2 | 3 | - | 1 | 5 | 2 | 4 | - | - | 2 | - | 2 | 1 | 2 | - | - |
| | 5% | 5% | 5% | 5% | 4% | 8% d | 5% | 8% | - | 5% | 7% | 3% | 4% | - | - | 5% | - | 8% | 4% | 8% | - | - |
| Changing laws/rules and regulations | 7 | 4 | 3 | 5 | 2 | 2 | 2 | 2 | 1 | 1 | 4 | 2 | 4 | - | - | 3 | 1 | 1 | 1 | 1 | 1 | - |
| | 4% | 3% | 7% | 5% | 3% | 5% | 5% | 5% | 2% | 5% | 6% | 3% | 4% | - | - | 7% | 11% | 4% | 4% | 4% | 5% | - |
| Response not relevant/ Positive response/ Technology is not a barrier | 7 | 5 | 2 | 3 | 4 | 1 | - | 3 | 3 | - | 2 | 5 | 6 | 2 | 1 | 4 | - | - | - | - | 1 | - |
| | 4% | 4% | 5% | 3% | 6% | 3% | - | 8% | 6% | - | 3% | 7% | 5% | 20% | 9% | 10% | - | - | - | - | 5% | - |
| Unnecessary/ Added work/burden/ Superfluous | 6 | 6 | - | 4 | 2 | 1 | 2 | - | 3 | - | 3 | 3 | 5 | - | - | - | 1 | 1 | - | 2 | 1 | - |
| | 4% | 5% | - | 4% | 3% | 3% | 5% | - | 6% | - | 4% | 4% | 4% | - | - | - | 11% | 4% | - | 8% | 5% | - |
| Constantly updating/ Changes too rapidly/ Data changes | 6 | 3 | 3 | 2 | 4 | - | 3 | 1 | 2 | - | 1 | 5 | 4 | - | - | 3 | 1 | - | 2 | 2 | 1 | - |
| | 4% | 3% | 7% | 2% | 6% | - | 8% | 3% | 4% | - | 1% | 7% | 4% | - | - | 7% | 11% | - | 8% | 8% | 5% | - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q7a_2. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Laws and regulation

Base: All respondents who think technology is a barrier to laws and regulation

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | *a | b | c | a | *b | *c | d | *e | f | *a | *b | *c | *d |
| Total | 162 | 119 | 43 | 94 | 68 | 37 | 38 | 39 | 48 | 22 | 67 | 71 | 112 | 10 | 11 | 42 | 9 | 24 | 26 | 25 | 19 | 12 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Interrupting/ Inhibiting/ Makes job difficult | 6 | 5 | 1 | 3 | 3 | 3 | - | 2 | 1 | 3 | 1 | 2 | 3 | 1 | - | 1 | 1 | 1 | 1 | - | 2 | 1 |
| | 4% | 4% | 2% | 3% | 4% | 8% | - | 5% | 2% | 14% | 1% | 3% | 3% | 10% | - | 2% | 11% | 4% | 4% | - | 11% | 8% |
| Difficulty understanding information received/Hard to decipher/ Too much information causes confusion | 6 | 5 | 1 | 5 | 1 | 2 | 2 | - | 2 | - | 5 | 1 | 4 | 1 | 1 | 1 | 1 | 2 | 1 | - | 1 | 1 |
| | 4% | 4% | 2% | 5% | 1% | 5% | 5% | - | 4% | - | 7% | 1% | 4% | 10% | 9% | 2% | 11% | 8% | 4% | - | 5% | 8% |
| Safety concerns/ Security risks/ Weak security | 4 | 3 | 1 | 1 | 3 | 1 | 2 | - | 1 | 1 | 2 | 1 | 2 | - | - | - | - | 2 | - | - | 2 | 1 |
| | 2% | 3% | 2% | 1% | 4% | 3% | 5% | - | 2% | 5% | 3% | 1% | 2% | - | - | - | - | 8% | - | - | 11% | 8% |
| Doesn't go as desired/ Isn't always correct/accurate/ Uncertainty | 4 | 2 | 2 | 3 | 1 | 1 | 2 | 1 | - | 1 | 2 | 1 | 2 | - | - | 2 | - | - | 1 | - | 1 | - |
| | 2% | 2% | 5% | 3% | 1% | 3% | 5% | 3% | - | 5% | 3% | 1% | 2% | - | - | 5% | - | - | 4% | - | 5% | - |
| Legal issues/ Red tapes | 4 | 3 | 1 | 1 | 3 | 2 | - | 2 | - | 1 | 2 | 1 | 3 | - | 1 | 2 | 1 | - | 1 | - | 1 | - |
| | 2% | 3% | 2% | 1% | 4% | 5% | - | 5% | - | 5% | 3% | 1% | 3% | - | 9% | 5% | 11% | - | 4% | - | 5% | - |
| Political/ Government issues | 4 | 4 | - | 2 | 2 | 1 | 2 | 1 | - | - | 2 | 2 | 4 | - | - | - | - | - | - | 1 | 1 | - |
| | 2% | 3% | - | 2% | 3% | 3% | 5% | 3% | - | - | 3% | 3% | 4% | - | - | - | - | - | - | 4% | 5% | - |
| Laws/ Local laws are inhibiting/restrictive | 4 | 2 | 2 | 3 | 1 | - | - | 2 | 2 | - | 2 | 2 | 2 | 2 | - | 2 | - | - | - | - | - | 1 |
| | 2% | 2% | 5% | 3% | 1% | - | - | 5% | 4% | - | 3% | 3% | 2% | 20% | - | 5% | - | - | - | - | - | 8% |
| Technology is useful/good/ Great help/ Makes work easier | 4 | 4 | - | 3 | 1 | 1 | 1 | 2 | - | 1 | 3 | - | 3 | - | 1 | - | - | - | 1 | - | - | - |
| | 2% | 3% | - | 3% | 1% | 3% | 3% | 5% | - | 5% | 4% | - | 3% | - | 9% | - | - | - | 4% | - | - | - |
| Time taking/consuming | 3 | 1 | 2 | 1 | 2 | 1 | - | 2 | - | 1 | - | 2 | 1 | - | - | 2 | - | - | - | - | 2 | - |
| | 2% | 1% | 5% | 1% | 3% | 3% | - | 5% | - | 5% | - | 3% | 1% | - | - | 5% | - | - | - | - | 11% | - |
| Costs/ Less cost effective | 3 | 1 | 2 | 3 | - | - | 1 | 1 | 1 | 1 | - | 2 | 1 | - | - | 2 | - | 1 | 1 | - | - | - |
| | 2% | 1% | 5% | 3% | - | - | 3% | 3% | 2% | 5% | - | 3% | 1% | - | - | 5% | - | 4% | 4% | - | - | - |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_2. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Laws and regulation

Base: All respondents who think technology is a barrier to laws and regulation

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | *a | b | c | a | *b | *c | d | *e | *f | *a | *b | *c | *d |
| Total | 162 | 119 | 43 | 94 | 68 | 37 | 38 | 39 | 48 | 22 | 67 | 71 | 112 | 10 | 11 | 42 | 9 | 24 | 26 | 25 | 19 | 12 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Requires technical understanding/skill/ computer knowledge | 3 | 3 | - | 2 | 1 | 3 | - | - | - | 1 | 1 | - | 2 | - | - | - | - | - | 1 | 1 | - | - |
| | 2% | 3% | - | 2% | 1% | 8% | - | - | - | 5% | 1% | - | 2% | - | - | - | - | - | 4% | 4% | - | - |
| Malicious/ Invasive/ Scams | 3 | 2 | 1 | 3 | - | - | 1 | 1 | 1 | - | 2 | 1 | 1 | - | - | 1 | - | 2 | - | 2 | - | - |
| | 2% | 2% | 2% | 3% | - | - | 3% | 3% | 2% | - | 3% | 1% | 1% | - | - | 2% | - | 8% | - | 8% | - | - |
| Data regulations (GDPR) | 3 | - | 3 | 3 | - | 2 | - | - | 1 | 2 | - | 1 | 1 | - | - | 2 | - | 1 | - | 1 | 2 | - |
| | 2% | - | 7% | 3% | - | 5% | - | - | 2% | 9% | - | 1% | 1% | - | - | 5% | - | 4% | - | 4% | 11% | - |
| Expensive/ Requires funding/finance/ Prohibitive costs | 2 | 1 | 1 | 1 | 1 | 1 | - | - | 1 | - | - | 2 | 1 | - | - | 1 | - | 1 | 2 | - | - | - |
| | 1% | 1% | 2% | 1% | 1% | 3% | - | - | 2% | - | - | 3% | 1% | - | - | 2% | - | 4% | 8% | - | - | - |
| Can't be humanly controlled/ Less human engagement/ Human does better | 2 | 2 | - | 1 | 1 | - | - | 1 | 1 | - | 1 | 1 | 2 | - | - | - | - | - | - | - | - | 1 |
| | 1% | 2% | - | 1% | 1% | - | - | 3% | 2% | - | 1% | 1% | 2% | - | - | - | - | - | - | - | - | 8% |
| Too much dependence on technology | 2 | 2 | - | 2 | - | 1 | - | 1 | - | 1 | - | 1 | 2 | - | - | - | - | - | 1 | - | - | - |
| | 1% | 2% | - | 2% | - | 3% | - | 3% | - | 5% | - | 1% | 2% | - | - | - | - | - | 4% | - | - | - |
| Technology is a barrier/rigid/non-flexible | 2 | 2 | - | 1 | 1 | - | 1 | - | 1 | - | - | 2 | - | - | - | - | - | 2 | 1 | 1 | - | - |
| | 1% | 2% | - | 1% | 1% | - | 3% | - | 2% | - | - | 3% | - | - | - | - | - | 8% | 4% | 4% | - | - |
| Adaptability issues | 2 | 2 | - | 2 | - | - | - | 1 | 1 | - | 1 | 1 | 2 | - | - | 1 | 1 | - | 1 | - | - | 1 |
| | 1% | 2% | - | 2% | - | - | - | 3% | 2% | - | 1% | 1% | 2% | - | - | 2% | 11% | - | 4% | - | - | 8% |
| Old and new technology differences | 2 | 2 | - | 2 | - | 1 | - | 1 | - | - | 1 | 1 | 2 | - | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | 2% | - | 3% | - | 3% | - | - | 1% | 1% | 2% | - | - | - | - | - | - | - | - | - |
| Bureaucracy | 2 | 1 | 1 | - | 2 | - | - | 1 | 1 | - | - | 2 | 1 | - | - | 2 | - | - | - | - | - | 1 |
| | 1% | 1% | 2% | - | 3% | - | - | 3% | 2% | - | - | 3% | 1% | - | - | 5% | - | - | - | - | - | 8% |
| Policy issues/ Changing policies | 2 | 2 | - | 2 | - | 1 | - | 1 | - | - | 1 | 1 | 2 | - | - | - | - | - | - | - | 1 | - |
| | 1% | 2% | - | 2% | - | 3% | - | 3% | - | - | 1% | 1% | 2% | - | - | - | - | - | - | - | 5% | - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q7a_2. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Laws and regulation

Base: All respondents who think technology is a barrier to laws and regulation

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | *a | b | c | a | *b | *c | d | *e | *f | *a | *b | *c | *d |
| Total | 162 | 119 | 43 | 94 | 68 | 37 | 38 | 39 | 48 | 22 | 67 | 71 | 112 | 10 | 11 | 42 | 9 | 24 | 26 | 25 | 19 | 12 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Reliability issues | 1 | - | 1 | 1 | - | - | 1 | - | - | - | - | 1 | 1 | - | - | 1 | - | - | - | 1 | - | - |
| | 1% | - | 2% | 1% | - | - | 3% | - | - | - | - | 1% | 1% | - | - | 2% | - | - | - | 4% | - | - |
| Need for quality/trained staff/employees/ Because of less staff | 1 | - | 1 | 1 | - | - | - | - | 1 | - | - | 1 | - | - | - | - | - | 1 | 1 | - | - | - |
| | 1% | - | 2% | 1% | - | - | - | - | 2% | - | - | 1% | - | - | - | - | 4% | 4% | - | - | - | - |
| Need for more buy in | 1 | - | 1 | 1 | - | 1 | - | - | - | - | 1 | - | - | - | - | 1 | - | - | 1 | - | - | - |
| | 1% | - | 2% | 1% | - | 3% | - | - | - | - | 1% | - | - | - | - | 2% | - | - | 4% | - | - | - |
| Availability of technology/equipments | 1 | 1 | - | - | 1 | - | - | 1 | - | - | 1 | - | 1 | 1 | 1 | - | 1 | - | - | - | - | 1 |
| | 1% | 1% | - | - | 1% | - | - | 3% | - | - | 1% | - | 1% | 10% | 9% | - | 11% | - | - | - | - | 8% |
| Not suitable/ Inconvenient | 1 | 1 | - | - | 1 | - | - | - | 1 | - | - | 1 | - | - | - | - | - | - | - | 1 | - | - |
| | 1% | 1% | - | - | 1% | - | - | - | 2% | - | - | 1% | - | - | - | - | - | - | - | 4% | - | - |
| No backup | 1 | 1 | - | 1 | - | - | 1 | - | - | - | - | 1 | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 1% | - | 1% | - | - | 3% | - | - | - | - | 1% | 1% | - | - | - | - | - | - | - | - | - |
| Not many increases/ Too many decreases | 1 | 1 | - | 1 | - | - | 1 | - | - | - | 1 | - | - | - | - | - | - | 1 | - | - | - | - |
| | 1% | 1% | - | 1% | - | - | 3% | - | - | - | 1% | - | - | - | - | - | 4% | - | - | - | - | - |
| Threat to people's jobs | 1 | 1 | - | 1 | - | - | - | - | 1 | - | - | 1 | - | - | 1 | - | - | - | - | - | - | - |
| | 1% | 1% | - | 1% | - | - | - | - | 2% | - | - | 1% | 1% | - | 9% | - | - | - | - | - | - | - |
| Data frauds/ Identity thefts | 1 | 1 | - | - | 1 | - | - | - | 1 | - | - | 1 | - | - | - | - | - | - | - | - | - | - |
| | 1% | 1% | - | - | 1% | - | - | - | 2% | - | - | 1% | 1% | - | - | - | - | - | - | - | - | - |
| Tech giants like Microsoft, Google, HPE etc. | 1 | 1 | - | - | 1 | - | 1 | - | - | - | - | 1 | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 1% | - | - | 1% | - | 3% | - | - | - | - | 1% | 1% | - | - | - | - | - | - | - | - | - |
| No opinion/ No specific reason/ No comments/ Refused/ Prefer not to say | 2 | - | 2 | 1 | 1 | - | 1 | 1 | - | - | 2 | - | - | - | - | 1 | - | 1 | 1 | 1 | - | - |
| | 1% | - | 5% | 1% | 1% | - | 3% | 3% | - | - | 3% | - | - | - | - | 2% | - | 4% | 4% | 4% | - | - |
| Other | 4 | 4 | - | 3 | 1 | - | 2 | 2 | - | - | 3 | 1 | 3 | - | 1 | - | - | 1 | 1 | 1 | - | - |
| | 2% | 3% | - | 3% | 1% | - | 5% | 5% | - | - | 4% | 1% | 3% | - | 9% | - | 4% | 4% | 4% | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_2. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Laws and regulation

Base: All respondents who think technology is a barrier to laws and regulation

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------------------------|----------|------|------------|-------------|---------------|--------|-----------|-----------------|---------------------|--|----------------------|---------------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Total | a | b | a | b | a | b | c | d | *a | b | c | a | *b | *c | d | *e | *f | *a | *b | *c | *d | |
| Total | 162 | 119 | 43 | 94 | 68 | 37 | 38 | 39 | 48 | 22 | 67 | 71 | 112 | 10 | 11 | 42 | 9 | 24 | 26 | 25 | 19 | 12 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Don't know | 3 | 1 | 2 | 2 | 1 | - | - | 2 | - | 2 | 1 | 3 | 2 | 2 | 2 | - | - | 1 | - | - | - | - |
| | 2% | 1% | 5% | 2% | 1% | 3% | - | - | 4% | - | 3% | 1% | 3% | 20% | 18% | 5% | - | 4% | - | - | - | - |
| Not applicable/ N/A/ None | 7 | 5 | 2 | 6 | 1 | 1 | 2 | 3 | 1 | 3 | 3 | 5 | - | - | 2 | 1 | 1 | 1 | 3 | - | - | - |
| | 4% | 4% | 5% | 6% | 1% | 3% | 3% | 5% | 6% | 5% | 4% | 4% | 4% | - | - | 5% | 11% | 4% | 4% | 12% | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_3. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Market research and analysis

Base: All respondents who think technology is a barrier to market research and analysis

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|-----------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 54 100% | 38 100% | 16 100% | 30 100% | 24 100% | 7 100% | 17 100% | 14 100% | 16 100% | 4 100% | 25 100% | 22 100% | 35 100% | 5 100% | 7 100% | 16 100% | 4 100% | 10 100% | 10 100% | 8 100% | 5 100% | 6 100% |
| Harder/difficult/complex/ Confusing | 3 6% | 2 5% | 1 6% | 2 7% | 1 4% | - | 1 6% | - | 2 13% | - | 2 8% | 1 5% | 2 6% | - | - | 1 6% | - | - | - | - | - | 1 17% |
| Limitations/ Can be limiting/ Not helping much | 3 6% | 2 5% | 1 6% | 3 10% | - | 1 14% | 1 6% | 1 7% | - | - | 3 12% | - | 2 6% | - | 1 14% | 1 6% | - | - | - | - | - | 1 17% |
| Costs/ Less cost effective | 3 6% | - | 3 19% | 1 3% | 2 8% | 1 14% | 1 6% | 1 7% | - | - | 2 8% | 1 5% | 1 3% | - | 1 14% | 2 13% | 1 25% | 1 10% | - | 1 13% | - | - |
| Constantly updating/ Changes too rapidly/ Data changes | 3 6% | 2 5% | 1 6% | 3 10% | - | - | 1 6% | 2 14% | - | - | 2 8% | 1 5% | 2 6% | 1 20% | - | - | - | 1 10% | 1 10% | - | - | - |
| Data managing/processing/ Vast data | 3 6% | 2 5% | 1 6% | 1 3% | 2 8% | - | 1 6% | - | 2 13% | - | 1 4% | 2 9% | 1 3% | - | - | 1 6% | - | 1 10% | 1 10% | 1 13% | - | - |
| Difficulty understanding information received/Hard to decipher/ Too much information causes confusion | 3 6% | 1 3% | 2 13% | - | 3 13% | - | - | 1 7% | 2 13% | - | - | 3 14% | 2 6% | - | - | 2 13% | 1 25% | - | 1 10% | - | 1 20% | 1 17% |
| Competition | 3 6% | 3 8% | - | 3 10% | - | - | 2 12% | - | 1 6% | - | 2 8% | 1 5% | 2 6% | - | 1 14% | - | - | 1 10% | - | - | - | - |
| Response not relevant/ Positive response/ Technology is not a barrier | 3 6% | 2 5% | 1 6% | 2 7% | 1 4% | - | 2 12% | 1 7% | - | - | 3 12% | - | 3 9% | 1 20% | - | 1 6% | - | - | 1 10% | - | - | - |
| Technology is useful/good/ Great help/ Makes work easier | 3 6% | 3 8% | - | 1 3% | 2 8% | 1 14% | - | 1 7% | 1 6% | - | 1 4% | 1 5% | 2 6% | 1 20% | 1 14% | 1 6% | 1 25% | 1 10% | - | - | - | - |
| Can slow down development/process/ Unproductive | 2 4% | 2 5% | - | 1 3% | 1 4% | 1 14% | - | 1 7% | - | 1 25% | 1 4% | - | 2 6% | 1 20% | 1 14% | 1 6% | 1 25% | - | 1 10% | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_3. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Market research and analysis

Base: All respondents who think technology is a barrier to market research and analysis

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|-----------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 54 100% | 38 100% | 16 100% | 30 100% | 24 100% | 7 100% | 17 100% | 14 100% | 16 100% | 4 100% | 25 100% | 22 100% | 35 100% | 5 100% | 7 100% | 16 100% | 4 100% | 10 100% | 10 100% | 8 100% | 5 100% | 6 100% |
| Safety concerns/ Security risks/ Weak security | 2 4% | 1 3% | 1 6% | 2 7% | - | 1 14% | - | - | 1 6% | 1 25% | - | 1 5% | - | - | - | - | - | 2 20% | - | - | 1 20% | 1 17% |
| Software issues/ System issues/failures | 2 4% | 2 5% | - | 1 3% | 1 4% | - | 1 6% | - | 1 6% | - | 1 4% | 1 5% | 1 3% | - | - | 1 6% | - | 1 10% | - | 1 13% | - | - |
| Too much dependence on technology | 2 4% | 1 3% | 1 6% | 1 3% | 1 4% | - | - | 1 7% | 1 6% | - | 1 4% | 1 5% | 1 3% | - | 1 14% | 1 6% | - | - | 1 10% | - | - | - |
| Tech giants like Microsoft, Google, HPE etc. | 2 4% | 2 5% | - | - | 2 8% | - | 2 12% | - | - | - | 1 4% | 1 5% | 2 6% | - | - | - | - | - | - | 1 13% | - | - |
| Expensive/ Requires funding/finance/ Prohibitive costs | 1 2% | 1 3% | - | - | 1 4% | - | 1 6% | - | - | 1 25% | - | - | - | - | - | - | - | 1 10% | - | - | 1 20% | - |
| Requires technical understanding/skill/ computer knowledge | 1 2% | 1 3% | - | - | 1 4% | 1 14% | - | - | - | 1 25% | - | - | - | 1 20% | 1 14% | 1 6% | - | - | - | - | - | - |
| Doesn't go as desired/ Isn't always correct/accurate/ Uncertainty | 1 2% | 1 3% | - | - | 1 4% | - | 1 6% | - | - | - | 1 4% | - | 1 3% | - | - | - | - | - | - | - | - | - |
| Interrupting/ Inhibiting/ Makes job difficult | 1 2% | - | 1 6% | - | 1 4% | - | 1 6% | - | - | - | - | 1 5% | 1 3% | - | - | 1 6% | - | - | - | 1 13% | - | - |
| Malicious/ Invasive/ Scams | 1 2% | 1 3% | - | 1 3% | - | - | - | 1 7% | - | - | - | 1 5% | 1 3% | - | - | - | - | - | - | - | - | - |
| Compliance | 1 2% | 1 3% | - | 1 3% | - | - | - | - | 1 6% | - | 1 4% | - | 1 3% | - | - | - | - | - | - | - | - | - |
| Keeping up to date/ Keeping up with changes | 1 2% | 1 3% | - | - | 1 4% | - | 1 6% | - | - | - | - | 1 5% | 1 3% | - | - | - | - | - | - | 1 13% | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_3. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Market research and analysis

Base: All respondents who think technology is a barrier to market research and analysis

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|-----------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 54 100% | 38 100% | 16 100% | 30 100% | 24 100% | 7 100% | 17 100% | 14 100% | 16 100% | 4 100% | 25 100% | 22 100% | 35 100% | 5 100% | 7 100% | 16 100% | 4 100% | 10 100% | 10 100% | 8 100% | 5 100% | 6 100% |
| Need for quality/trained staff/employees/ Because of less staff | 1 2% | 1 3% | - | 1 3% | - | - | 1 6% | - | - | - | 1 4% | - | 1 3% | - | - | - | - | - | 1 10% | - | - | - |
| Need for more buy in | 1 2% | 1 3% | - | 1 3% | - | - | - | 1 7% | - | - | 1 4% | - | 1 3% | - | - | - | - | - | - | - | - | - |
| Old and new technology differences | 1 2% | - | 1 6% | 1 3% | - | - | - | 1 7% | - | - | 1 4% | - | - | - | - | 1 6% | - | - | - | - | - | 1 17% |
| Advanced technologies like AI/ Automation | 1 2% | 1 3% | - | 1 3% | - | - | - | - | 1 6% | - | - | 1 5% | 1 3% | - | - | - | - | - | - | - | - | 1 20% |
| Not popular/interesting/ No interest | 1 2% | - | 1 6% | - | 1 4% | - | - | - | 1 6% | - | - | - | - | - | - | 1 6% | - | - | 1 10% | - | - | - |
| Data frauds/ Identity thefts | 1 2% | 1 3% | - | 1 3% | - | - | - | 1 7% | - | - | 1 5% | 1 3% | - | - | - | - | - | - | - | - | - | - |
| Other | 2 4% | 2 5% | - | 2 7% | - | - | - | 1 7% | 1 6% | - | - | 2 9% | 1 3% | - | - | 1 6% | - | 1 10% | 2 20% | - | - | - |
| Not applicable/ N/A/ None | 6 11% | 4 11% | 2 13% | 4 13% | 2 8% | 1 14% | 2 12% | 1 7% | 2 13% | - | 4 16% | 1 5% | 4 11% | - | - | - | - | 1 10% | - | 2 25% | 1 20% | 2 33% |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_4. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Vendor management

Base: All respondents who think technology is a barrier to vendor management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|-----------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 72 100% | 54 100% | 18 100% | 41 100% | 31 100% | 10 100% | 22 100% | 14 100% | 26 100% | 3 100% | 39 100% | 28 100% | 55 100% | 13 100% | 9 100% | 24 100% | 7 100% | 7 100% | 17 100% | 9 100% | 5 100% | 10 100% |
| Vendor/suppliers related | 11 15% | 10 19% | 1 6% | 7 17% | 4 13% | 2 20% | 4 18% | 1 7% | 4 15% | 1 33% | 5 13% | 5 18% | 10 18% | - - | - - | 2 8% | 2 29% | - - | 2 12% | 2 22% | - - | 2 20% |
| Response not relevant/ Positive response/ Technology is not a barrier | 10 14% | 9 17% | 1 6% | 6 15% | 4 13% | 3 30% | 5 23% | 1 7% | 1 4% | - - | 8 21% | 1 4% | 10 18% | 3 23% | 3 33% | 2 8% | 1 14% | - - | 3 18% | - - | 1 20% | - - |
| Harder/difficult/complex/ Confusing | 8 11% | 8 15% | - - | 5 12% | 3 10% | 2 20% | 1 5% | 1 7% | 4 15% | 1 33% | 5 13% | 2 7% | 7 13% | 2 15% | - - | 2 8% | 1 14% | - - | 1 6% | 2 22% | 1 20% | - - |
| Technology is useful/good/ Great help/ Makes work easier | 4 6% | 3 6% | 1 6% | 3 7% | 1 3% | - - | 3 14% | 1 7% | - - | - - | 4 10% | - - | 4 7% | 2 15% | - - | 2 8% | - - | - - | 3 18% | - - | - - | - - |
| Limitations/ Can be limiting/ Not helping much | 3 4% | 3 6% | - - | 2 5% | 1 3% | - - | 1 5% | - - | 2 8% | - - | - - | 3 11% | 2 4% | - - | - - | - - | 1 14% | 1 14% | 1 6% | 1 11% | - - | - - |
| Time taking/consuming | 2 3% | 1 2% | 1 6% | - - | 2 6% | - - | - - | 1 7% | 1 4% | - - | 1 3% | 1 4% | 1 2% | - - | - - | 1 4% | - - | - - | - - | - - | - - | 1 10% |
| Can slow down development/process/ Unproductive | 2 3% | 1 2% | 1 6% | - - | 2 6% | - - | - - | 1 7% | 1 4% | - - | 1 3% | 1 4% | 1 2% | - - | - - | - - | - - | 1 14% | - - | - - | 1 20% | 1 10% |
| Costs/ Less cost effective | 2 3% | - - | 2 11% | 2 5% | - - | - - | - - | 1 7% | 1 4% | - - | 2 5% | - - | 2 4% | 1 8% | 1 11% | 2 8% | 2 29% | - - | - - | - - | - - | - - |
| Can't be humanly controlled/ Less human engagement/ Human does better | 2 3% | 1 2% | 1 6% | 2 5% | - - | - - | - - | - 8% | 2 8% | - - | 1 3% | 1 4% | 1 2% | - - | - - | 1 4% | 1 14% | - - | 1 6% | - - | - - | 1 10% |
| Malicious/ Invasive/ Scams | 2 3% | 1 2% | 1 6% | 1 2% | 1 3% | - - | 2 9% | - - | - - | - - | 2 5% | - - | 1 2% | - - | - - | 1 4% | - - | - - | 1 6% | - - | - - | - - |
| Reliability issues | 2 3% | 1 2% | 1 6% | 2 5% | - - | - - | - - | 1 7% | 1 4% | - - | 2 5% | - - | 2 4% | 1 8% | - - | 2 8% | - - | - - | - - | - - | - - | 1 10% |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_4. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Vendor management

Base: All respondents who think technology is a barrier to vendor management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|-----------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 72 100% | 54 100% | 18 100% | 41 100% | 31 100% | 10 100% | 22 100% | 14 100% | 26 100% | 3 100% | 39 100% | 28 100% | 55 100% | 13 100% | 9 100% | 24 100% | 7 100% | 7 100% | 17 100% | 9 100% | 5 100% | 10 100% |
| Distracts/ People get too busy with social media, tech projects etc. | 2 3% | 2 4% | - | 1 2% | 1 3% | - | 1 5% | - | 1 4% | - | 1 3% | 1 4% | 1 2% | 1 8% | - | - | - | - | - | - | - | - |
| Availability of technology/equipments | 2 3% | 2 4% | - | 1 2% | 1 3% | - | 1 5% | 1 7% | - | - | 1 3% | 1 4% | 1 2% | - | 1 11% | - | - | - | 1 6% | - | - | - |
| Old and new technology differences | 2 3% | 2 4% | - | 2 5% | - | - | - | - | 2 8% | - | 1 3% | 1 4% | 2 4% | - | - | 1 4% | 1 14% | - | 1 6% | - | - | - |
| Tech giants like Microsoft, Google, HPE etc. | 2 3% | 2 4% | - | - | 2 6% | - | 2 9% | - | - | - | 1 3% | 1 4% | 2 4% | - | - | - | - | - | - | 1 11% | - | - |
| Too much enforcements/ Regulations/ Contraints | 1 1% | 1 2% | - | 1 2% | - | - | - | 1 7% | - | - | - | 1 4% | 1 2% | - | - | - | - | - | - | - | - | - |
| Safety concerns/ Security risks/ Weak security | 1 1% | 1 2% | - | 1 2% | - | - | - | - | 1 4% | - | - | 1 4% | - | - | - | - | - | 1 14% | - | - | - | 1 10% |
| Unnecessary/ Added work/burden/ Superfluous | 1 1% | - | 1 6% | - | 1 3% | - | - | - | 1 4% | - | - | 1 4% | - | - | - | 1 4% | - | - | - | - | - | 1 10% |
| Constantly updating/ Changes too rapidly/ Data changes | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | 1 11% | - | - | - | - | - | 1 20% | - |
| Software issues/ System issues/failures | 1 1% | 1 2% | - | - | 1 3% | - | - | - | 1 4% | - | - | 1 4% | - | - | - | - | - | 1 14% | - | - | - | - |
| Difficulty understanding information received/Hard to decipher/ Too much information causes confusion | 1 1% | 1 2% | - | 1 2% | - | 1 10% | - | - | - | - | - | - | - | - | - | - | - | 1 14% | - | 1 11% | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_4. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Vendor management

Base: All respondents who think technology is a barrier to vendor management

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|----------------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | *b | *c | *d | *a | b | *c | a | *b | *c | *d | *e | *f | *a | *b | *c | *d | |
| Total | 72 | 54 | 18 | 41 | 31 | 10 | 22 | 14 | 26 | 3 | 39 | 28 | 55 | 13 | 9 | 24 | 7 | 7 | 17 | 9 | 5 | 10 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Legal issues/ Red tapes | 1 | - | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | - | - | 1 | - | - | - | - | - | 1 |
| | 1% | - | 6% | - | 3% | - | - | - | 4% | - | - | 4% | - | - | - | 4% | - | - | - | - | - | 10% |
| Policy issues/ Changing policies | 1 | 1 | - | 1 | - | - | 1 | - | - | - | - | 1 | 1 | - | - | - | 1 | - | - | 1 | - | - |
| | 1% | 2% | - | 2% | - | - | 5% | - | - | - | - | 4% | 2% | - | - | - | 14% | - | - | 11% | - | - |
| Other | 3 | 2 | 1 | 2 | 1 | 2 | 1 | - | - | 1 | 2 | - | 2 | - | - | 1 | - | - | 2 | - | 1 | - |
| | 4% | 4% | 6% | 5% | 3% | 20% | 5% | - | - | 33% | 5% | - | 4% | - | - | 4% | - | - | 12% | - | 20% | - |
| Don't know | 3 | - | 3 | 2 | 1 | - | - | 1 | 2 | - | 1 | 2 | 2 | 3 | 2 | 3 | - | - | - | - | - | - |
| | 4% | - | 17% | 5% | 3% | - | - | 7% | 8% | - | 3% | 7% | 4% | 23% | 22% | 13% | - | - | - | - | - | - |
| Not applicable/ N/A/ None | 8 | 6 | 2 | 4 | 4 | - | 2 | 3 | 3 | - | 4 | 4 | 6 | 1 | 1 | 3 | 1 | 2 | 2 | 3 | - | 1 |
| | 11% | 11% | 11% | 10% | 13% | - | 9% | 21% | 12% | - | 10% | 14% | 11% | 8% | 11% | 13% | 14% | 29% | 12% | 33% | - | 10% |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_5. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Process management

Base: All respondents who think technology is a barrier to process management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 67 100% | 51 100% | 16 100% | 35 100% | 32 100% | 16 100% | 19 100% | 15 100% | 17 100% | 5 100% | 37 100% | 23 100% | 45 100% | 7 100% | 5 100% | 19 100% | 8 100% | 11 100% | 15 100% | 12 100% | 6 100% | 10 100% |
| Response not relevant/ Positive response/ Technology is not a barrier | 7 10% | 5 10% | 2 13% | 3 9% | 4 13% | 3 19% | 3 16% | - - | 1 6% | 1 20% | 3 8% | 1 4% | 5 11% | 1 14% | - - | 3 16% | - - | 1 9% | 1 7% | 2 17% | 1 17% | 1 10% |
| Harder/difficult/complex/ Confusing | 5 7% | 5 10% | - - | 3 9% | 2 6% | 3 19% | - - | - - | 2 12% | 1 20% | 2 5% | 2 9% | 5 11% | - - | - - | - - | - - | - - | - - | - - | - - | 1 10% |
| Time taking/consuming | 5 7% | 2 4% | 3 19% | 2 6% | 3 9% | 2 13% | 1 5% | 1 7% | 1 6% | - - | 3 8% | 2 9% | 1 2% | - - | - - | 3 16% | - - | 1 9% | 1 7% | 3 25% | - - | - - |
| Requires technical understanding/skill/ computer knowledge | 4 6% | 3 6% | 1 6% | 3 9% | 1 3% | 2 13% | 1 5% | 1 7% | - - | 1 20% | 3 8% | - - | 3 7% | - - | - - | 2 11% | 1 13% | - - | 2 13% | - - | 2 33% | - - |
| Development of procedures/processes | 4 6% | 4 8% | - - | 2 6% | 2 6% | - - | 1 5% | 1 7% | 2 12% | - - | 1 3% | 3 13% | 3 7% | - - | 1 20% | - - | - - | 1 9% | 1 7% | 1 8% | - - | 1 10% |
| Safety concerns/ Security risks/ Weak security | 3 4% | 1 2% | 2 13% | 1 3% | 2 6% | - - | 1 5% | 1 7% | 1 6% | - - | 2 5% | 1 4% | 2 4% | - - | - - | 2 11% | 2 25% | 1 9% | 1 7% | - - | - - | 1 10% |
| Interrupting/ Inhibiting/ Makes job difficult | 3 4% | 2 4% | 1 6% | 3 9% | - - | - - | - - | 2 13% | 1 6% | - - | 2 5% | 1 4% | 2 4% | 1 14% | - - | 2 11% | - - | - - | - - | - - | - - | 1 10% |
| Can slow down development/process/ Unproductive | 2 3% | 1 2% | 1 6% | 1 3% | 1 3% | - - | 1 5% | - - | 1 6% | - - | 1 3% | 1 4% | 2 4% | - - | 1 20% | - - | - - | - - | - - | 1 8% | - - | - - |
| Software issues/ System issues/failures | 2 3% | 2 4% | - - | 1 3% | 1 3% | - - | - - | 2 13% | - - | - - | - - | 2 9% | 1 2% | - - | - - | - - | - - | 1 9% | - - | 1 8% | 1 17% | - - |
| Compliance | 2 3% | 2 4% | - - | 1 3% | 1 3% | - - | 2 11% | - - | - - | - - | 2 5% | - - | 1 2% | - - | 1 20% | - - | - - | 1 9% | 2 13% | - - | - - | - - |
| Legal issues/ Red tapes | 2 3% | 2 4% | - - | 2 6% | - - | 2 13% | - - | - - | - - | - - | 2 5% | - - | 2 4% | - - | - - | - - | - - | - - | 1 7% | - - | 1 17% | - - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_5. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Process management

Base: All respondents who think technology is a barrier to process management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 67 100% | 51 100% | 16 100% | 35 100% | 32 100% | 16 100% | 19 100% | 15 100% | 17 100% | 5 100% | 37 100% | 23 100% | 45 100% | 7 100% | 5 100% | 19 100% | 8 100% | 11 100% | 15 100% | 12 100% | 6 100% | 10 100% |
| Advanced technologies like AI/ Automation | 2 3% | 1 2% | 1 6% | 2 6% | - | 2 13% | - | - | - | - | 2 5% | - | 1 2% | - | - | 1 5% | 1 13% | - | 1 7% | - | 1 17% | - |
| Technology is useful/good/ Great help/ Makes work easier | 2 3% | 1 2% | 1 6% | 1 3% | 1 3% | 1 6% | 1 5% | - | - | - | 2 5% | - | 2 4% | 1 14% | - | - | 1 13% | - | 1 7% | - | - | - |
| Too much enforcements/ Regulations/ Constrains | 1 1% | 1 2% | - | - | 1 3% | - | - | - | 1 6% | - | 1 3% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| Limitations/ Can be limiting/ Not helping much | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| Costs/ Less cost effective | 1 1% | - | 1 6% | - | 1 3% | - | - | - | 1 6% | - | - | 1 4% | - | - | - | 1 5% | - | - | - | - | - | 1 10% |
| Doesn't go as desired/ Isn't always correct/accurate/ Uncertainty | 1 1% | 1 2% | - | 1 3% | - | - | - | 1 7% | - | - | 1 4% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| Constantly updating/ Changes too rapidly/ Data changes | 1 1% | 1 2% | - | 1 3% | - | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | - | 1 8% | - | - |
| Data managing/processing/ Vast data | 1 1% | 1 2% | - | - | 1 3% | 1 6% | - | - | - | - | 1 3% | - | 1 2% | 1 14% | - | - | - | - | 1 7% | - | - | - |
| Can't be humanly controlled/ Less human engagement/ Human does better | 1 1% | 1 2% | - | 1 3% | - | - | - | - | 1 6% | - | 1 3% | - | 1 2% | - | - | - | 1 13% | - | 1 7% | - | - | - |
| Malicious/ Invasive/ Scams | 1 1% | 1 2% | - | 1 3% | - | - | - | 1 7% | - | - | 1 4% | - | 1 2% | - | - | - | - | - | - | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_5. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Process management

Base: All respondents who think technology is a barrier to process management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 67 100% | 51 100% | 16 100% | 35 100% | 32 100% | 16 100% | 19 100% | 15 100% | 17 100% | 5 100% | 37 100% | 23 100% | 45 100% | 7 100% | 5 100% | 19 100% | 8 100% | 11 100% | 15 100% | 12 100% | 6 100% | 10 100% |
| Difficulty understanding information received/Hard to decipher/ Too much information causes confusion | 1 1% | 1 2% | - - | - - | 1 3% | - - | - - | - - | 1 6% | - - | - - | 1 4% | 1 2% | - - | - - | - - | - - | - - | 1 7% | - - | - - | - - |
| Too much dependence on technology | 1 1% | - - | 1 6% | - - | 1 3% | - - | - - | 1 7% | - - | - - | 1 3% | - - | - - | - - | - - | 1 5% | - - | - - | - - | - - | - - | - - |
| Need for more buy in | 1 1% | 1 2% | - - | - - | 1 3% | - - | - - | 1 7% | - - | - - | 1 4% | 1 2% | - - | - - | - - | - - | - - | - - | - - | - - | - - | 1 10% |
| Availability of technology/equipments | 1 1% | - - | 1 6% | - - | 1 3% | 1 6% | - - | - - | - - | 1 20% | - - | - - | - - | - - | - - | 1 5% | - - | - - | - - | - - | 1 17% | - - |
| Adaptability issues | 1 1% | 1 2% | - - | - - | 1 3% | - - | - - | 1 6% | - - | - - | 1 4% | - - | - - | - - | - - | - - | 1 9% | - - | - - | - - | - - | 1 10% |
| Not suitable/ Inconvenient | 1 1% | 1 2% | - - | - - | 1 3% | - - | - - | 1 7% | - - | - - | 1 3% | - - | 1 2% | 1 14% | 1 20% | - - | 1 13% | - - | - - | - - | - - | 1 10% |
| Difficulties in management/effective management | 1 1% | - - | 1 6% | - - | 1 3% | - - | - - | 1 6% | - - | - - | 1 4% | - - | - - | - - | - - | 1 5% | - - | - - | - - | - - | - - | 1 10% |
| Resistance to new technology/software/ No software support | 1 1% | - - | 1 6% | - - | 1 3% | - - | - - | 1 6% | - - | - - | 1 4% | - - | - - | - - | 1 5% | - - | - - | - - | 1 8% | - - | - - | - - |
| No backup | 1 1% | 1 2% | - - | - - | 1 3% | - - | 1 5% | - - | - - | 1 20% | - - | - - | - - | - - | - - | - - | - - | 1 9% | - - | - - | 1 17% | - - |
| Not many increases/ Too many decreases | 1 1% | 1 2% | - - | 1 3% | - - | - - | 1 5% | - - | - - | - - | 1 3% | - - | - - | - - | - - | - - | - - | 1 9% | - - | - - | - - | - - |
| Different systems/ Not following same technology/setup/process | 1 1% | 1 2% | - - | 1 3% | - - | - - | 1 5% | - - | - - | - - | 1 3% | - - | 1 2% | - - | - - | - - | - - | - - | - - | - - | - - | - - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_5. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Process management

Base: All respondents who think technology is a barrier to process management

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------------------------|----------|------|------------|-------------|---------------|--------|-----------|-----------------|---------------------|--|----------------------|---------------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Total | a | *b | a | b | *a | *b | *c | *d | *a | b | *c | a | *b | *c | *d | *e | *f | *a | *b | *c | *d | |
| Total | 67 | 51 | 16 | 35 | 32 | 16 | 19 | 15 | 17 | 5 | 37 | 23 | 45 | 7 | 5 | 19 | 8 | 11 | 15 | 12 | 6 | 10 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Other | 2 | 2 | - | 1 | 1 | 1 | 1 | - | - | 1 | - | 1 | 2 | 1 | - | 1 | - | - | - | - | - | - |
| | 3% | 4% | - | 3% | 3% | 6% | 5% | - | - | 20% | - | 4% | 4% | 14% | - | 5% | - | - | - | - | - | - |
| Not applicable/ N/A/ None | 6 | 5 | 1 | 4 | 2 | - | 2 | 2 | 2 | - | 4 | 2 | 3 | 1 | 1 | 2 | 1 | 2 | 1 | 3 | - | - |
| | 9% | 10% | 6% | 11% | 6% | - | 11% | 13% | 12% | - | 11% | 9% | 7% | 14% | 20% | 11% | 13% | 18% | 7% | 25% | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_6. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Data management

Base: All respondents who think technology is a barrier to data management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 77 100% | 55 100% | 22 100% | 45 100% | 32 100% | 16 100% | 21 100% | 16 100% | 24 100% | 9 100% | 33 100% | 31 100% | 53 100% | 10 100% | 8 100% | 21 100% | 5 100% | 12 100% | 18 100% | 14 100% | 7 100% | 7 100% |
| Data managing/processing/ Vast data | 8 10% | 6 11% | 2 9% | 5 11% | 3 9% | 3 19% | 1 5% | 1 6% | 3 13% | 1 11% | 4 12% | 3 10% | 5 9% | - | - | 3 14% | - | 1 8% | 2 11% | 1 7% | 1 14% | 2 29% |
| Response not relevant/ Positive response/ Technology is not a barrier | 8 10% | 7 13% | 1 5% | 5 11% | 3 9% | 3 19% | 4 19% | - | 1 4% | 1 11% | 4 12% | 1 3% | 6 11% | 2 20% | 1 13% | 2 10% | - | 2 17% | 3 17% | 1 7% | 1 14% | 1 14% |
| Harder/difficult/complex/ Confusing | 6 8% | 6 11% | - | 4 9% | 2 6% | 2 13% | 2 10% | 1 6% | 1 4% | 1 11% | 3 9% | 2 6% | 6 11% | 1 10% | - | - | 1 20% | - | 1 6% | 2 14% | 1 14% | - |
| Time taking/consuming | 5 6% | 2 4% | 3 14% | 1 2% | 4 13% | 2 13% | 1 5% | 1 6% | 1 4% | 1 11% | 2 6% | 2 6% | 3 6% | - | 1 13% | 3 14% | 1 20% | - | - | 2 14% | 1 14% | - |
| Safety concerns/ Security risks/ Weak security | 4 5% | 3 5% | 1 5% | 3 7% | 1 3% | 1 6% | - | 2 13% | 1 4% | - | 1 3% | 3 10% | 3 6% | - | - | 1 5% | - | 1 8% | 2 11% | - | - | - |
| Difficulties in management/effective management | 4 5% | 3 5% | 1 5% | 3 7% | 1 3% | - | 2 10% | - | 2 8% | 1 11% | 2 6% | 1 3% | 3 6% | - | 1 13% | 1 5% | - | - | - | 1 7% | - | - |
| Unnecessary/ Added work/burden/ Superfluous | 3 4% | 2 4% | 1 5% | 1 2% | 2 6% | 2 13% | - | - | 1 4% | 2 22% | - | 1 3% | 1 2% | - | - | 1 5% | - | - | - | 1 7% | - | 1 14% |
| Constantly updating/ Changes too rapidly/ Data changes | 3 4% | 1 2% | 2 9% | 2 4% | 1 3% | 1 6% | - | 1 6% | 1 4% | - | 1 3% | 1 3% | 1 2% | - | - | 2 10% | - | - | 1 6% | - | - | 1 14% |
| Keeping up to date/ Keeping up with changes | 3 4% | 3 5% | - | 3 7% | - | 2 13% | - | 1 6% | - | 1 11% | 1 3% | 1 3% | 3 6% | - | - | 1 5% | - | - | 1 6% | - | 1 14% | 1 14% |
| Technology is useful/good/ Great help/ Makes work easier | 3 4% | 2 4% | 1 5% | 2 4% | 1 3% | - | 2 10% | 1 6% | - | - | 2 6% | 1 3% | 3 6% | 1 10% | - | - | 1 20% | - | 2 11% | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_6. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Data management

Base: All respondents who think technology is a barrier to data management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 77 100% | 55 100% | 22 100% | 45 100% | 32 100% | 16 100% | 21 100% | 16 100% | 24 100% | 9 100% | 33 100% | 31 100% | 53 100% | 10 100% | 8 100% | 21 100% | 5 100% | 12 100% | 18 100% | 14 100% | 7 100% | 7 100% |
| Too much enforcements/ Regulations/ Constraints | 2 3% | - | 2 9% | 2 4% | - | - | - | 1 6% | 1 4% | - | - | 2 6% | - | - | - | 1 5% | - | 1 8% | - | - | - | - |
| Limitations/ Can be limiting/ Not helping much | 2 3% | 1 2% | 1 5% | 2 4% | - | 1 5% | - | 1 4% | - | 2 6% | - | - | 2 4% | 1 10% | 1 13% | 1 5% | 1 20% | - | - | - | - | |
| Software issues/ System issues/failures | 2 3% | 2 4% | - | 1 2% | 1 3% | - | 1 5% | - | 1 4% | - | - | 2 6% | 1 2% | - | - | - | 1 20% | 1 8% | - | 1 7% | - | - |
| Malicious/ Invasive/ Scams | 2 3% | 2 4% | - | 2 4% | - | - | - | 2 13% | - | - | - | 2 6% | 2 4% | - | - | - | - | - | - | - | 1 14% | - |
| Different systems/ Not following same technology/setup/process | 2 3% | 1 2% | 1 5% | 1 2% | 1 3% | - | 1 5% | - | 1 4% | - | 1 3% | 1 3% | 2 4% | 1 10% | - | 1 5% | 1 20% | - | - | 1 7% | - | - |
| Quality of data | 2 3% | - | 2 9% | 1 2% | 1 3% | 1 6% | - | - | 1 4% | 1 11% | - | 1 3% | 1 2% | - | - | 1 5% | - | 1 8% | 1 6% | - | - | 1 14% |
| Can slow down development/process/ Unproductive | 1 1% | 1 2% | - | 1 2% | - | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | - | 1 7% | - | - |
| Costs/ Less cost effective | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | 1 6% | - | - | - |
| Expensive/ Requires funding/finance/ Prohibitive costs | 1 1% | 1 2% | - | - | 1 3% | 1 6% | - | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| Vendor/suppliers related | 1 1% | 1 2% | - | - | 1 3% | - | - | - | 1 4% | - | - | 1 3% | 1 2% | - | - | - | - | - | 1 6% | - | - | - |
| Doesn't go as desired/ Isn't always correct/accurate/ Uncertainty | 1 1% | 1 2% | - | 1 2% | - | 1 6% | - | - | - | 1 11% | - | - | 1 2% | - | - | - | - | - | - | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_6. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Data management

Base: All respondents who think technology is a barrier to data management

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 77 100% | 55 100% | 22 100% | 45 100% | 32 100% | 16 100% | 21 100% | 16 100% | 24 100% | 9 100% | 33 100% | 31 100% | 53 100% | 10 100% | 8 100% | 21 100% | 5 100% | 12 100% | 18 100% | 14 100% | 7 100% | 7 100% |
| Difficulty understanding information received/Hard to decipher/ Too much information causes confusion | 1 1% | 1 2% | - | - | 1 3% | - | - | - | 1 4% | - | - | 1 3% | 1 2% | - | - | - | - | - | 1 6% | - | - | - |
| Too much dependence on technology | 1 1% | 1 2% | - | 1 2% | - | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | 1 6% | - | - | - |
| Need for more buy in | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | 1 13% | - | - | - | - | - | 1 14% | - |
| Development of procedures/processes | 1 1% | 1 2% | - | - | 1 3% | - | - | 1 6% | - | - | 1 3% | - | - | - | - | - | 1 8% | - | - | 1 7% | - | - |
| Technology is a barrier/rigid/non-flexible | 1 1% | 1 2% | - | 1 2% | - | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| Not suitable/ Inconvenient | 1 1% | 1 2% | - | 1 2% | - | - | - | 1 6% | - | - | 1 3% | - | - | - | 1 13% | - | - | - | - | - | - | - |
| No backup | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | 1 11% | - | - | - | - | - | - | 1 8% | - | - | 1 14% | - | - |
| Risky | 1 1% | - | 1 5% | 1 2% | - | - | - | 1 6% | - | - | 1 3% | - | 1 2% | 1 10% | - | - | - | - | - | - | - | - |
| Data frauds/ Identity thefts | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 3% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| No opinion/ No specific reason/ No comments/ Refused/ Prefer not to say | 1 1% | 1 2% | - | 1 2% | - | - | - | - | 1 4% | - | 1 3% | - | - | 1 10% | - | - | - | - | - | - | - | - |
| Other | 2 3% | 1 2% | 1 5% | 2 4% | - | - | - | - | 2 8% | - | - | 2 6% | 1 2% | - | - | 1 5% | - | 1 8% | 1 6% | 1 7% | - | - |
| Don't know | 1 1% | - | 1 5% | 1 2% | - | - | - | - | 1 4% | - | - | 1 3% | 1 2% | 1 10% | 1 13% | 1 5% | - | - | - | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_6. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Data management

Base: All respondents who think technology is a barrier to data management

Significance Level: 95%

Not applicable/ N/A/ None

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---------------------------|----------|------|------------|-------------|---------------|--------|-----------|-----------------|---------------------|--|----------------------|---------------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|------|
| | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Total | a | *b | a | b | *a | *b | *c | *d | *a | b | c | a | *b | *c | *d | *e | *f | *a | *b | *c | *d | |
| Total | 77 | 55 | 22 | 45 | 32 | 16 | 21 | 16 | 24 | 9 | 33 | 31 | 53 | 10 | 8 | 21 | 5 | 12 | 18 | 14 | 7 | 7 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Not applicable/ N/A/ None | 8 | 6 | 2 | 4 | 4 | 1 | 1 | 3 | 3 | - | 4 | 3 | 4 | 1 | 1 | 2 | 1 | 3 | 1 | 3 | 1 | 1 |
| | 10% | 11% | 9% | 9% | 13% | 6% | 5% | 19% | 13% | - | 12% | 10% | 8% | 10% | 13% | 10% | 20% | 25% | 6% | 21% | 14% | 14% |

Compliance and Procurement Sentiment - Wave 2

Q7a_7. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Developing and guiding policy and procedure (creating best practice)

Base: All respondents who think technology is a barrier to developing and guiding policy and procedure (creating best practice)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 81 100% | 54 100% | 27 100% | 46 100% | 35 100% | 20 100% | 21 100% | 20 100% | 20 100% | 5 100% | 45 100% | 28 100% | 52 100% | 6 100% | 8 100% | 26 100% | 7 100% | 13 100% | 16 100% | 11 100% | 10 100% | 8 100% |
| Response not relevant/ Positive response/ Technology is not a barrier | 9 11% | 6 11% | 3 11% | 7 15% | 2 6% | 4 20% | 4 19% | - - | 1 5% | - - | 6 13% | 1 4% | 6 12% | 2 33% | 1 13% | 4 15% | 1 14% | 2 15% | 1 6% | 1 9% | 1 10% | - - |
| Harder/difficult/complex/ Confusing | 6 7% | 5 9% | 1 4% | 5 11% | 1 3% | 1 5% | - - | 1 5% | 4 20% | - - | 3 7% | 3 11% | 4 8% | 1 17% | - - | 1 4% | 1 14% | 1 8% | 1 6% | - - | - - | 1 13% |
| Unnecessary/ Added work/burden/ Superfluous | 5 6% | 2 4% | 3 11% | 2 4% | 3 9% | 1 5% | 1 5% | - - | 3 15% | - - | 3 7% | 2 7% | 1 2% | 1 17% | - - | 3 12% | - - | - - | - - | 1 9% | - - | 1 13% |
| Can't be humanly controlled/ Less human engagement/ Human does better | 4 5% | 1 2% | 3 11% | 2 4% | 2 6% | - - | - - | 2 10% | 2 10% | - - | 1 2% | 3 11% | 2 4% | - - | - - | 2 8% | 1 14% | 1 8% | 2 13% | - - | 2 20% | - - |
| Legal issues/ Red tapes | 4 5% | 2 4% | 2 7% | 3 7% | 1 3% | 3 15% | - - | - - | 1 5% | - - | 3 7% | 1 4% | 2 4% | - - | - - | 1 4% | - - | 1 8% | 2 13% | - - | 1 10% | - - |
| Need for quality/trained staff/employees/ Because of less staff | 4 5% | 3 6% | 1 4% | 3 7% | 1 3% | 1 5% | 2 10% | 1 5% | - - | 1 20% | 1 2% | 2 7% | 3 6% | - - | - - | 1 4% | - - | - - | - - | - - | 2 20% | - - |
| Time taking/consuming | 3 4% | 2 4% | 1 4% | 1 2% | 2 6% | 1 5% | 2 10% | - - | - - | - - | 2 4% | 1 4% | 3 6% | - - | 1 13% | 1 4% | 1 14% | - - | 1 6% | 1 9% | - - | - - |
| Doesn't go as desired/ Isn't always correct/accurate/ Uncertainty | 3 4% | 3 6% | - - | 1 2% | 2 6% | 2 10% | - - | 1 5% | 1 5% | 2 40% | - - | 1 4% | 2 4% | - - | - - | - - | - - | 1 8% | - - | - - | - - | 1 13% |
| Development of procedures/processes | 3 4% | 2 4% | 1 4% | 1 2% | 2 6% | - - | 1 5% | 1 5% | 1 5% | 1 20% | 1 2% | 1 4% | 2 4% | - - | 1 13% | - - | - - | 1 8% | 1 6% | - - | 1 10% | - - |
| Too much enforcements/ Regulations/ Contraints | 2 2% | 1 2% | 1 4% | 1 2% | 1 3% | - - | 1 5% | 1 5% | - - | - - | 1 2% | 1 4% | 1 2% | - - | - - | 2 8% | - - | - - | 1 6% | 1 9% | - - | - - |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_7. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Developing and guiding policy and procedure (creating best practice)

Base: All respondents who think technology is a barrier to developing and guiding policy and procedure (creating best practice)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 81 | 54 | 27 | 46 | 35 | 20 | 21 | 20 | 20 | 5 | 45 | 28 | 52 | 6 | 8 | 26 | 7 | 13 | 16 | 11 | 10 | 8 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Can slow down development/process/ Unproductive | 2 | - | 2 | 1 | 1 | - | - | 1 | 1 | - | 1 | 1 | 1 | - | - | 2 | 1 | - | - | - | - | - |
| | 2% | - | 7% | 2% | 3% | - | - | 5% | 5% | - | 2% | 4% | 2% | - | - | 8% | 14% | - | - | - | - | - |
| Interrupting/ Inhibiting/ Makes job difficult | 2 | 1 | 1 | 1 | 1 | 1 | - | - | 1 | - | - | 2 | 1 | - | - | 1 | - | - | - | 1 | - | 1 |
| | 2% | 2% | 4% | 2% | 3% | 5% | - | - | 5% | - | - | 7% | 2% | - | - | 4% | - | - | - | 9% | - | 13% |
| Malicious/ Invasive/ Scams | 2 | 2 | - | 1 | 1 | - | - | 2 | - | - | - | 2 | 2 | - | - | 1 | - | - | - | - | - | - |
| | 2% | 4% | - | 2% | 3% | - | - | 10% | - | - | - | 7% | 4% | - | - | 4% | - | - | - | - | - | - |
| Policy issues/ Changing policies | 2 | 1 | 1 | 2 | - | - | - | 1 | 1 | - | 1 | 1 | 1 | - | - | 1 | - | - | 2 | - | - | - |
| | 2% | 2% | 4% | 4% | - | - | - | 5% | 5% | - | 2% | 4% | 2% | - | - | 4% | - | - | 13% | - | - | - |
| Technology is useful/good/ Great help/ Makes work easier | 2 | 1 | 1 | 1 | 1 | - | 2 | - | - | - | 2 | - | 2 | 1 | - | 1 | - | - | 2 | - | - | - |
| | 2% | 2% | 4% | 2% | 3% | - | 10% | - | - | - | 4% | - | 4% | 17% | - | 4% | - | - | 13% | - | - | - |
| Limitations/ Can be limiting/ Not helping much | 1 | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | 2% | - | - | - | 5% | - | - | 2% | - | 2% | - | - | - | - | - | - | - | - | - |
| Safety concerns/ Security risks/ Weak security | 1 | 1 | - | 1 | - | - | - | - | 1 | - | - | 1 | - | - | - | - | - | 1 | - | - | - | 1 |
| | 1% | 2% | - | 2% | - | - | - | - | 5% | - | - | 4% | - | - | - | - | - | 8% | - | - | - | 13% |
| Costs/ Less cost effective | 1 | - | 1 | 1 | - | - | - | 1 | - | - | 1 | - | - | - | - | 1 | - | - | - | - | - | - |
| | 1% | - | 4% | 2% | - | - | - | 5% | - | - | 2% | - | - | - | - | 4% | - | - | - | - | - | - |
| Expensive/ Requires funding/finance/ Prohibitive costs | 1 | 1 | - | - | 1 | - | 1 | - | - | 1 | - | - | - | - | - | - | - | 1 | - | - | 1 | - |
| | 1% | 2% | - | - | 3% | - | 5% | - | - | 20% | - | - | - | - | - | - | - | 8% | - | - | 10% | - |
| Requires technical understanding/skill/ computer knowledge | 1 | 1 | - | - | 1 | 1 | - | - | - | - | 1 | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | - | 3% | 5% | - | - | - | - | 2% | - | 2% | - | - | - | - | - | - | - | - | - |
| Software issues/ System issues/failures | 1 | 1 | - | 1 | - | 1 | - | - | - | - | 1 | - | 1 | - | - | - | - | - | 1 | - | - | - |
| | 1% | 2% | - | 2% | - | 5% | - | - | - | - | 2% | - | 2% | - | - | - | - | - | 6% | - | - | - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_7. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Developing and guiding policy and procedure (creating best practice)

Base: All respondents who think technology is a barrier to developing and guiding policy and procedure (creating best practice)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 81 100% | 54 100% | 27 100% | 46 100% | 35 100% | 20 100% | 21 100% | 20 100% | 20 100% | 5 100% | 45 100% | 28 100% | 52 100% | 6 100% | 8 100% | 26 100% | 7 100% | 13 100% | 16 100% | 11 100% | 10 100% | 8 100% |
| Difficulty understanding information received/Hard to decipher/ Too much information causes confusion | 1 1% | 1 2% | - | 1 2% | - | - | - | - | 1 5% | - | - | 1 4% | 1 2% | - | - | - | - | - | - | - | - | - |
| Compliance | 1 1% | - | 1 4% | - | 1 3% | 1 5% | - | - | - | - | 1 2% | - | - | - | - | 1 4% | - | - | - | - | - | - |
| Too much dependence on technology | 1 1% | - | 1 4% | - | 1 3% | - | - | 1 5% | - | - | 1 2% | - | - | - | - | 1 4% | - | - | - | - | - | - |
| Distracts/ People get too busy with social media, tech projects etc. | 1 1% | 1 2% | - | 1 2% | - | 1 5% | - | - | - | - | 1 2% | - | 1 2% | - | - | - | - | - | - | 1 9% | - | - |
| Changing laws/rules and regulations | 1 1% | 1 2% | - | 1 2% | - | - | - | 1 5% | - | - | 1 4% | - | 1 2% | - | - | - | - | - | 1 6% | - | - | - |
| Need for more buy in | 1 1% | 1 2% | - | 1 2% | - | - | - | - | 1 5% | - | - | 1 4% | 1 2% | - | - | - | - | - | 1 6% | - | - | - |
| Technology is a barrier/rigid/non-flexible | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 2% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| Adaptability issues | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 2% | - | 1 2% | - | - | - | - | - | - | - | - | - |
| Old and new technology differences | 1 1% | - | 1 4% | 1 2% | - | - | - | - | 1 5% | - | - | - | - | - | - | - | - | - | - | - | - | 1 13% |
| Resistance to new technology/software/ No software support | 1 1% | 1 2% | - | - | 1 3% | 1 5% | - | - | - | - | 1 4% | - | - | - | - | - | - | 1 8% | - | 1 9% | - | - |
| No backup | 1 1% | 1 2% | - | - | 1 3% | - | 1 5% | - | - | - | 1 2% | - | 1 2% | - | 1 13% | - | - | - | - | - | 1 10% | - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_7. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Developing and guiding policy and procedure (creating best practice)

Base: All respondents who think technology is a barrier to developing and guiding policy and procedure (creating best practice)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 81 100% | 54 100% | 27 100% | 46 100% | 35 100% | 20 100% | 21 100% | 20 100% | 20 100% | 5 100% | 45 100% | 28 100% | 52 100% | 6 100% | 8 100% | 26 100% | 7 100% | 13 100% | 16 100% | 11 100% | 10 100% | 8 100% |
| Data regulations (GDPR) | 1 1% | - | 1 4% | - | 1 3% | - | - | - | 1 5% | - | - | 1 4% | - | - | - | 1 4% | - | - | - | - | - | - |
| Not many increases/ Too many decreases | 1 1% | 1 2% | - | 1 2% | - | - | 1 5% | - | - | - | 1 2% | - | - | - | - | - | - | 1 8% | - | - | - | - |
| Quality of data | 1 1% | 1 2% | - | - | 1 3% | 1 5% | - | - | - | - | 1 2% | - | 1 2% | - | - | - | - | - | - | - | 1 10% | - |
| No opinion/ No specific reason/ No comments/ Refused/ Prefer not to say | 1 1% | 1 2% | - | - | 1 3% | - | - | 1 5% | - | - | 1 2% | - | 1 2% | 1 17% | 1 13% | 1 4% | - | - | - | 1 9% | - | - |
| Other | 4 5% | 3 6% | 1 4% | 2 4% | 2 6% | 2 10% | 1 5% | - | 1 5% | - | 3 7% | 1 4% | 4 8% | - | 1 13% | - | - | - | 1 6% | - | - | - |
| Not applicable/ N/A/ None | 12 15% | 8 15% | 4 15% | 8 17% | 4 11% | - | 3 14% | 6 30% | 3 15% | - | 9 20% | 3 11% | 7 13% | 1 17% | 2 25% | 4 15% | 2 29% | 2 15% | 2 13% | 3 27% | - | 3 38% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_8. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Monitoring supplier performance

Base: All respondents who think technology is a barrier to monitoring supplier performance

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|-----------|------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 64 100% | 45 100% | 19 100% | 32 100% | 32 100% | 9 100% | 15 100% | 24 100% | 16 100% | 9 100% | 26 100% | 25 100% | 44 100% | 9 100% | 5 100% | 18 100% | 7 100% | 11 100% | 8 100% | 5 100% | 10 100% | 8 100% |
| Response not relevant/ Positive response/ Technology is not a barrier | 12 19% | 10 22% | 2 11% | 5 16% | 7 22% | 5 56% | 2 13% | 4 17% | 1 6% | 5 56% | 2 8% | 4 16% | 6 14% | 1 11% | 2 40% | 3 17% | - - | 2 18% | 1 13% | 3 60% | 3 30% | 2 25% |
| Harder/difficult/complex/ Confusing | 4 6% | 3 7% | 1 5% | 1 3% | 3 9% | - - | 2 13% | 2 8% | - - | - - | 2 8% | 2 8% | 3 7% | 1 11% | - - | 1 6% | - - | - - | - - | - - | - - | - - |
| Safety concerns/ Security risks/ Weak security | 4 6% | 3 7% | 1 5% | 2 6% | 2 6% | 1 11% | 1 7% | 1 4% | 1 6% | 1 11% | 1 4% | 1 4% | 3 7% | - - | - - | 1 6% | 1 14% | 1 9% | - - | - - | 1 10% | 1 13% |
| Doesn't go as desired/ Isn't always correct/accurate/ Uncertainty | 4 6% | 1 2% | 3 16% | 2 6% | 2 6% | - - | - - | 2 8% | 2 13% | 1 11% | 1 4% | 2 8% | 2 5% | 1 11% | - - | 2 11% | 1 14% | 1 9% | 1 13% | - - | 1 10% | - - |
| Technology is useful/good/ Great help/ Makes work easier | 4 6% | 2 4% | 2 11% | 2 6% | 2 6% | 1 11% | 2 13% | - - | 1 6% | - - | 3 12% | 1 4% | 3 7% | 1 11% | - - | 1 6% | - - | 1 9% | 2 25% | - - | 1 10% | 1 13% |
| Vendor/suppliers related | 3 5% | 3 7% | - - | 3 9% | - - | - - | - - | 1 4% | 2 13% | - - | 1 4% | 2 8% | 3 7% | - - | - - | - - | 1 14% | - - | 1 13% | - - | - - | - - |
| Can slow down development/process/ Unproductive | 2 3% | 2 4% | - - | 1 3% | 1 3% | 1 11% | - - | 1 4% | - - | 1 11% | 1 4% | - - | 2 5% | - - | - - | - - | - - | - - | - - | - - | - - | - - |
| Limitations/ Can be limiting/ Not helping much | 2 3% | 1 2% | 1 5% | 2 6% | - - | - - | - - | - - | 2 13% | - - | - - | 1 4% | 1 2% | - - | - - | - - | - - | 1 9% | 1 13% | - - | - - | - - |
| Costs/ Less cost effective | 2 3% | 1 2% | 1 5% | 1 3% | 1 3% | - - | - - | 1 4% | 1 6% | - - | 1 4% | 1 4% | 2 5% | 1 11% | 2 40% | 1 6% | 1 14% | - - | - - | - - | - - | - - |
| Can't be humanly controlled/ Less human engagement/ Human does better | 2 3% | 1 2% | 1 5% | - - | 2 6% | - - | - - | 1 4% | 1 6% | - - | - - | 2 8% | 2 5% | - - | - - | 1 6% | 1 14% | - - | - - | - - | 2 20% | - - |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_8. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Monitoring supplier performance

Base: All respondents who think technology is a barrier to monitoring supplier performance

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | | |
|--|------------|------------|------------|------------|---------------|-----------|------------|------------|-----------------|---------------------|--|----------------------|---------------|---|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|----------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies | |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 64 100% | 45 100% | 19 100% | 32 100% | 32 100% | 9 100% | 15 100% | 24 100% | 16 100% | 9 100% | 26 100% | 25 100% | 44 100% | 9 100% | 5 100% | 18 100% | 7 100% | 11 100% | 8 100% | 5 100% | 10 100% | 8 100% | |
| Need for quality/trained staff/employees/ Because of less staff | 2 3% | 1 2% | 1 5% | - - | 2 6% | - - | - - | 2 8% | - - | - - | - - | 2 8% | 2 5% | 1 11% | 1 20% | 1 6% | 1 14% | - - | - - | - - | - - | 1 13% | |
| Too much dependence on technology | 2 3% | 1 2% | 1 5% | 1 3% | 1 3% | - - | 1 7% | - - | 1 6% | 1 11% | - - | 1 4% | 1 2% | - - | - - | 1 6% | - - | - - | - - | - - | - - | 1 13% | |
| Distracts/ People get too busy with social media, tech projects etc. | 2 3% | 2 4% | - - | - - | 2 6% | - - | 1 7% | 1 4% | - - | - - | 1 4% | 1 4% | 1 2% | 2 22% | - - | 1 6% | - - | - - | - - | - - | - - | - - | |
| Tech giants like Microsoft, Google, HPE etc. | 2 3% | 2 4% | - - | 1 3% | 1 3% | - - | 1 7% | - - | 1 6% | - - | 1 4% | 1 4% | 1 2% | - - | - - | - - | - - | 1 9% | - - | 1 20% | - - | - - | |
| Expensive/ Requires funding/finance/ Prohibitive costs | 1 2% | 1 2% | - - | - - | 1 3% | - - | - - | - - | 1 6% | - - | - - | 1 4% | 1 2% | - - | - - | 1 6% | - - | - - | - - | - - | - - | - - | |
| Requires technical understanding/skill/ computer knowledge | 1 2% | 1 2% | - - | - - | 1 3% | - - | - - | 1 4% | - - | - - | - - | - - | - - | - - | - - | - - | - - | 1 9% | - - | - - | - - | - - | |
| Constantly updating/ Changes too rapidly/ Data changes | 1 2% | 1 2% | - - | 1 3% | - - | - - | - - | - - | 1 6% | - - | - - | 1 4% | 1 2% | - - | - - | - - | - - | - - | - - | - - | - - | - - | |
| Software issues/ System issues/failures | 1 2% | 1 2% | - - | - - | 1 3% | - - | - - | 1 4% | - - | - - | - - | 1 4% | 1 2% | - - | - - | - - | - - | - - | - - | - - | 1 10% | - - | |
| Reliability issues | 1 2% | - - | 1 5% | 1 3% | - - | - - | - - | - - | 1 6% | - - | 1 4% | - - | 1 2% | - - | - - | 1 6% | - - | - - | - - | - - | - - | - - | 1 13% |
| Not many increases/ Too many decreases | 1 2% | 1 2% | - - | 1 3% | - - | - - | 1 7% | - - | - - | - - | 1 4% | - - | - - | - - | - - | - - | - - | 1 9% | - - | - - | - - | - - | |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q7a_8. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Monitoring supplier performance

Base: All respondents who think technology is a barrier to monitoring supplier performance

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | *b | *c | *d | *a | *b | *c | a | *b | *c | *d | *e | *f | *a | *b | *c | *d | |
| Total | 64 | 45 | 19 | 32 | 32 | 9 | 15 | 24 | 16 | 9 | 26 | 25 | 44 | 9 | 5 | 18 | 7 | 11 | 8 | 5 | 10 | 8 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Different systems/ Not following same technology/setup/process | 1 | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | 1 | - | - | - | - | - | - | - | - | - |
| | 2% | 2% | - | 3% | - | - | - | 4% | - | - | 4% | - | 2% | - | - | - | - | - | - | - | - | - |
| No opinion/ No specific reason/ No comments/ Refused/ Prefer not to say | 1 | - | 1 | 1 | - | - | - | 1 | - | - | 1 | - | - | - | - | - | 1 | 1 | - | - | - | - |
| | 2% | - | 5% | 3% | - | - | - | 4% | - | - | 4% | - | - | - | - | - | 9% | 13% | - | - | - | - |
| Other | 2 | 1 | 1 | - | 2 | - | 1 | 1 | - | - | 1 | 1 | 1 | - | - | - | 1 | - | - | - | - | 1 |
| | 3% | 2% | 5% | - | 6% | - | 7% | 4% | - | - | 4% | 4% | 2% | - | - | - | 9% | - | - | - | - | 13% |
| Not applicable/ N/A/ None | 8 | 6 | 2 | 7 | 1 | 1 | 3 | 4 | - | - | 8 | - | 7 | 1 | - | 3 | 1 | 1 | 1 | 1 | 1 | - |
| | 13% | 13% | 11% | 22% | 3% | 11% | 20% | 17% | - | - | 31% | - | 16% | 11% | - | 17% | 14% | 13% | 20% | 10% | 10% | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_9. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Supplier spend analysis

Base: All respondents who think technology is a barrier to supplier spend analysis

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|-----------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 68 100% | 51 100% | 17 100% | 39 100% | 29 100% | 10 100% | 15 100% | 22 100% | 21 100% | 9 100% | 36 100% | 22 100% | 52 100% | 10 100% | 6 100% | 18 100% | 9 100% | 6 100% | 14 100% | 7 100% | 8 100% | 10 100% |
| Technology is useful/good/ Great help/ Makes work easier | 11 16% | 7 14% | 4 24% | 8 21% | 3 10% | 1 10% | 4 27% | 2 9% | 4 19% | 1 11% | 7 19% | 3 14% | 8 15% | 4 40% | 1 17% | 1 6% | 2 22% | 2 33% | 5 36% | 1 14% | - - | 2 20% |
| Expensive/ Requires funding/finance/ Prohibitive costs | 6 9% | 4 8% | 2 12% | 2 5% | 4 14% | 1 10% | 1 7% | 2 9% | 2 10% | 1 11% | 1 3% | 3 14% | 4 8% | - - | 1 17% | 2 11% | 1 11% | 1 17% | 1 7% | 1 14% | - - | 1 10% |
| Response not relevant/ Positive response/ Technology is not a barrier | 5 7% | 5 10% | - - | 4 10% | 1 3% | 2 20% | 1 7% | - - | 2 10% | 2 22% | 1 3% | 2 9% | 4 8% | - - | - - | - - | - - | 1 17% | - - | 1 14% | 1 13% | 1 10% |
| Harder/difficult/complex/ Confusing | 3 4% | 2 4% | 1 6% | 3 8% | - - | 1 10% | - - | 1 5% | 1 5% | - - | 3 8% | - - | 2 4% | 1 10% | - - | 1 6% | - - | - - | 1 7% | 1 14% | - - | - - |
| Time taking/consuming | 3 4% | 2 4% | 1 6% | 1 3% | 2 7% | 1 10% | 1 7% | 1 5% | - - | 1 11% | 2 6% | - - | 2 4% | - - | - - | 1 6% | - - | - - | 1 7% | - - | - - | 1 10% |
| Limitations/ Can be limiting/ Not helping much | 2 3% | 1 2% | 1 6% | - - | 2 7% | - - | - - | 1 5% | 1 5% | 1 11% | - - | 1 5% | 1 2% | - - | - - | 1 6% | - - | - - | - - | - - | 1 13% | - - |
| Costs/ Less cost effective | 2 3% | 2 4% | - - | 1 3% | 1 3% | 1 10% | - - | 1 5% | - - | - - | 1 3% | 1 5% | 2 4% | - - | - - | 1 6% | - - | - - | 1 7% | - - | - - | - - |
| Doesn't go as desired/ Isn't always correct/accurate/ Uncertainty | 2 3% | 1 2% | 1 6% | 2 5% | - - | - - | 1 7% | - - | 1 5% | - - | 1 3% | 1 5% | 1 2% | - - | - - | - - | - - | 1 17% | - - | - - | - - | - - |
| Reliability issues | 2 3% | 1 2% | 1 6% | 2 5% | - - | - - | 1 7% | - - | 1 5% | 1 11% | 1 3% | - - | 2 4% | - - | - - | 1 6% | - - | - - | - - | - - | 1 13% | 1 10% |
| Need for quality/trained staff/employees/ Because of less staff | 2 3% | 1 2% | 1 6% | 1 3% | 1 3% | - - | - - | 1 5% | 1 5% | - - | - - | 2 9% | 2 4% | 1 10% | 1 17% | 1 6% | 1 11% | - - | 1 7% | - - | - - | - - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7a_9. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Supplier spend analysis

Base: All respondents who think technology is a barrier to supplier spend analysis

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 68 | 51 | 17 | 39 | 29 | 10 | 15 | 22 | 21 | 9 | 36 | 22 | 52 | 10 | 6 | 18 | 9 | 6 | 14 | 7 | 8 | 10 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Technology is a barrier/rigid/non-flexible | 2 | 2 | - | - | 2 | 1 | 1 | - | - | - | 2 | - | 2 | - | 1 | - | - | - | 1 | - | - | - |
| | 3% | 4% | - | - | 7% | 10% | 7% | - | - | - | 6% | - | 4% | - | 17% | - | - | - | 7% | - | - | - |
| Can slow down development/process/ Unproductive | 1 | 1 | - | - | 1 | - | 1 | - | - | - | 1 | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | - | 3% | - | 7% | - | - | - | 3% | - | 2% | - | - | - | - | - | - | - | - | - |
| Safety concerns/ Security risks/ Weak security | 1 | - | 1 | - | 1 | - | - | 1 | - | - | 1 | - | 1 | - | - | 1 | 1 | - | - | - | - | - |
| | 1% | - | 6% | - | 3% | - | - | 5% | - | - | 3% | - | 2% | - | - | 6% | 11% | - | - | - | - | - |
| Vendor/suppliers related | 1 | 1 | - | 1 | - | - | 1 | - | - | - | 1 | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | 3% | - | - | 7% | - | - | - | 3% | - | 2% | - | - | - | - | - | - | - | - | - |
| Software issues/ System issues/failures | 1 | 1 | - | - | 1 | - | - | 1 | - | - | - | 1 | 1 | - | - | - | - | - | - | - | 1 | - |
| | 1% | 2% | - | - | 3% | - | - | 5% | - | - | - | 2% | - | - | - | - | - | - | - | - | 13% | - |
| Data managing/processing/ Vast data | 1 | 1 | - | - | 1 | - | 1 | - | - | - | 1 | - | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | - | 3% | - | 7% | - | - | - | 3% | - | 2% | - | - | - | - | - | - | - | - | - |
| Interrupting/ Inhibiting/ Makes job difficult | 1 | 1 | - | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | - | - | - | - | - | - | 1 | - |
| | 1% | 2% | - | 3% | - | 10% | - | - | - | 11% | - | - | 2% | - | - | - | - | - | - | - | 13% | - |
| Malicious/ Invasive/ Scams | 1 | 1 | - | 1 | - | - | - | 1 | - | - | - | 1 | 1 | - | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | 3% | - | - | - | 5% | - | - | - | 2% | - | - | - | - | - | - | - | - | - | - |
| Compliance | 1 | - | 1 | 1 | - | 1 | - | - | - | - | 1 | - | - | - | - | 1 | - | - | 1 | - | - | - |
| | 1% | - | 6% | 3% | - | 10% | - | - | - | - | 3% | - | - | - | - | 6% | - | - | 7% | - | - | - |
| Legal issues/ Red tapes | 1 | - | 1 | 1 | - | 1 | - | - | - | - | 1 | - | - | - | - | 1 | - | - | 1 | - | - | - |
| | 1% | - | 6% | 3% | - | 10% | - | - | - | - | 3% | - | - | - | - | 6% | - | - | 7% | - | - | - |
| Not suitable/ Inconvenient | 1 | 1 | - | - | 1 | - | - | 1 | - | - | 1 | - | - | 1 | - | - | - | - | - | - | - | - |
| | 1% | 2% | - | - | 3% | - | - | 5% | - | - | 3% | - | - | 10% | - | - | - | - | - | - | - | - |
| Difficulties in management/effective management | 1 | 1 | - | 1 | - | - | - | 1 | - | - | 1 | - | 1 | - | - | 1 | 1 | - | 1 | - | - | - |
| | 1% | 2% | - | 3% | - | - | - | 5% | - | - | 3% | - | 2% | - | - | 6% | 11% | - | 7% | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q7a_9. You mentioned that technology can be a barrier to you doing some of the duties and tasks you do. Why do you say that technology is a barrier to you doing these duties and tasks?

Supplier spend analysis

Base: All respondents who think technology is a barrier to supplier spend analysis

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|---|------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|-----------|--------------------|---------------|-----------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 68 100% | 51 100% | 17 100% | 39 100% | 29 100% | 10 100% | 15 100% | 22 100% | 21 100% | 9 100% | 36 100% | 22 100% | 52 100% | 10 100% | 6 100% | 18 100% | 9 100% | 6 100% | 14 100% | 7 100% | 8 100% | 10 100% |
| Political/ Government issues | 1 1% | 1 2% | - | - | 1 3% | - | - | - | 1 5% | - | - | 1 5% | 1 2% | - | - | - | - | - | - | - | - | - |
| No backup | 1 1% | 1 2% | - | - | 1 3% | - | 1 7% | - | - | 1 11% | - | - | - | - | - | - | - | 1 17% | - | - | 1 13% | - |
| Availability/lack of resources/infrastructure | 1 1% | - | 1 6% | 1 3% | - | - | - | - | 1 5% | - | - | 1 5% | - | - | - | 1 6% | - | - | - | - | - | 1 10% |
| No opinion/ No specific reason/ No comments/ Refused/ Prefer not to say | 1 1% | 1 2% | - | - | 1 3% | - | - | 1 5% | - | - | 1 3% | - | 1 2% | 1 10% | 1 17% | 1 6% | - | - | - | 1 14% | - | - |
| Other | 3 4% | 3 6% | - | 2 5% | 1 3% | - | - | 1 5% | 2 10% | - | 2 6% | 1 5% | 3 6% | - | - | - | 1 11% | - | 1 7% | - | 1 13% | - |
| Don't know | 1 1% | 1 2% | - | - | 1 3% | - | - | - | 1 5% | - | - | 1 5% | 1 2% | - | - | - | - | - | - | - | - | 1 10% |
| Not applicable/ N/A/ None | 13 19% | 10 20% | 3 18% | 9 23% | 4 14% | 1 10% | 3 20% | 6 27% | 3 14% | - | 10 28% | 3 14% | 10 19% | 2 20% | 1 17% | 5 28% | 2 22% | - | 2 14% | 2 29% | 1 13% | 2 20% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7b. How, if at all, could technology be useful for you in helping to fulfil your duties and tasks?

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | | | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Increase efficiency | 444 72% | 291 71% | 153 73% | 220 71% | 224 72% | 107 68% | 112 77% | 79 72% | 145 71% | 60 69% | 151 67% | 213 77% | 272 72% | 19 53% | 21 62% | 137 74% | 25 68% | 62 71% | 72 69% | 76 72% | 62 90% | 46 68% |
| Will help to more effectively analyse and monitor large amounts of data | 378 61% | 256 63% | 122 58% | 188 61% | 190 61% | 79 50% | 93 64% | 68 62% | 137 67% | 39 45% | 137 61% | 184 67% | 237 63% | 18 50% | 20 59% | 111 60% | 25 68% | 59 68% | 71 68% | 69 66% | 39 57% | 38 56% |
| Will improve communication | 374 61% | 245 60% | 129 61% | 198 64% | 176 57% | 88 56% | 98 67% | 66 61% | 121 60% | 49 56% | 139 62% | 172 62% | 238 63% | 23 64% | 23 68% | 110 59% | 25 68% | 52 60% | 66 63% | 70 67% | 32 46% | 38 56% |
| Can help better automate workflow | 334 54% | 225 55% | 109 52% | 169 55% | 165 53% | 69 44% | 87 60% | 56 51% | 121 60% | 35 40% | 122 54% | 164 59% | 211 56% | 17 47% | 17 50% | 96 52% | 24 65% | 50 57% | 56 54% | 54 51% | 40 58% | 33 49% |
| Other | 4 1% | 3 1% | 1 * | 2 1% | 2 1% | 1 1% | 3 2% | - - | - - | - - | 2 1% | 2 1% | 3 1% | - - | - - | 1 1% | 1 3% | - - | 1 1% | 2 2% | - - | - - |
| None of the above, technology would <u>not</u> be useful to help me fulfil my duties and tasks | 17 3% | 11 3% | 6 3% | 10 3% | 7 2% | 8 5% | 4 3% | 1 1% | 4 2% | 7 8% | 4 2% | 4 1% | 9 2% | 2 6% | 3 9% | 7 4% | 1 3% | 2 2% | 1 1% | 2 2% | 2 3% | 1 1% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q7b. How, if at all, could technology be useful for you in helping to fulfil your duties and tasks?

Base: All respondents (excluding none)

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|---|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | | | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 600 100% | 396 100% | 204 100% | 298 100% | 302 100% | 150 100% | 142 100% | 108 100% | 199 100% | 80 100% | 221 100% | 272 100% | 367 100% | 34 100% | 31 100% | 178 100% | 36 100% | 85 100% | 103 100% | 103 100% | 67 100% | 67 100% |
| Increase efficiency | 444 74% | 291 73% | 153 75% | 220 74% | 224 74% | 107 71% | 112 79% | 79 73% | 145 73% | 60 75% | 151 68% | 213 78% | 272 74% | 19 56% | 21 68% | 137 77% | 25 69% | 62 73% | 72 70% | 76 74% | 62 93% | 46 69% |
| Will help to more effectively analyse and monitor large amounts of data | 378 63% | 256 65% | 122 60% | 188 63% | 190 63% | 79 53% | 93 65% | 68 63% | 137 69% | 39 49% | 137 62% | 184 68% | 237 65% | 18 53% | 20 65% | 111 62% | 25 69% | 59 69% | 71 69% | 69 67% | 39 58% | 38 57% |
| Will improve communication | 374 62% | 245 62% | 129 63% | 198 66% | 176 58% | 88 59% | 98 69% | 66 61% | 121 61% | 49 61% | 139 63% | 172 63% | 238 65% | 23 68% | 23 74% | 110 62% | 25 69% | 52 61% | 66 64% | 70 68% | 32 48% | 38 57% |
| Can help better automate workflow | 334 56% | 225 57% | 109 53% | 169 57% | 165 55% | 69 46% | 87 61% | 56 52% | 121 61% | 35 44% | 122 55% | 164 60% | 211 57% | 17 50% | 17 55% | 96 54% | 24 67% | 50 59% | 56 54% | 54 52% | 40 60% | 33 49% |
| Other | 4 1% | 3 1% | 1 * | 2 1% | 2 1% | 1 1% | 3 2% | - - | - - | - - | 2 1% | 2 1% | 3 1% | - - | - - | 1 1% | 1 3% | - - | 1 1% | 2 2% | - - | - - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q8. Has your organisation been subject to any incidents of fraud recently?

Base: All respondents

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|----------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub-Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Yes, in the past 3 months | 48 8% | 26 6% | 22 10% | 23 7% | 25 8% | 2 1% | 13 9% | 11 10% | 22 11% | 2 2% | 20 9% | 26 9% | 27 7% | 9 25% | 4 12% | 18 10% | 2 5% | 10 11% | 13 13% | 4 4% | 6 9% | 7 10% |
| Yes, in the past 6 months | 48 8% | 32 8% | 16 8% | 24 8% | 24 8% | 10 6% | 7 5% | 13 12% | 18 9% | 5 6% | 22 10% | 20 7% | 31 8% | 13 36% | 10 29% | 15 8% | 9 24% | 6 7% | 11 11% | 8 8% | 3 4% | 3 4% |
| Yes, in the past 12 months | 35 6% | 24 6% | 11 5% | 18 6% | 17 6% | 5 3% | 16 11% | 3 3% | 11 5% | 4 5% | 15 7% | 15 5% | 21 6% | 2 6% | 4 12% | 10 5% | 3 8% | 10 11% | 7 7% | 6 6% | 4 6% | 2 3% |
| Yes, in the past 2 years | 69 11% | 47 12% | 22 10% | 45 15% | 24 8% | 11 7% | 19 13% | 14 13% | 25 12% | 6 7% | 27 12% | 34 12% | 42 11% | 2 6% | 7 21% | 17 9% | 8 22% | 14 16% | 12 12% | 13 12% | 4 6% | 7 10% |
| No | 382 62% | 260 64% | 122 58% | 183 59% | 199 64% | 124 78% | 86 59% | 63 58% | 108 53% | 68 78% | 134 60% | 163 59% | 239 64% | 9 25% | 7 21% | 113 61% | 14 38% | 43 49% | 58 56% | 68 65% | 50 72% | 41 60% |
| Don't know | 35 6% | 18 4% | 17 8% | 15 5% | 20 6% | 6 4% | 5 3% | 5 5% | 19 9% | 2 2% | 7 3% | 18 7% | 16 4% | 1 3% | 2 6% | 12 6% | 1 3% | 4 5% | 3 3% | 6 6% | 2 3% | 8 12% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Yes | 200 32% | 129 32% | 71 34% | 110 36% | 90 29% | 28 18% | 55 38% | 41 38% | 76 37% | 17 20% | 84 37% | 95 34% | 121 32% | 26 72% | 25 74% | 60 32% | 22 59% | 40 46% | 43 41% | 31 30% | 17 25% | 19 28% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q8. Has your organisation been subject to any incidents of fraud recently?

Base: All respondents (excluding don't know)

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|----------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub-Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 582 100% | 389 100% | 193 100% | 293 100% | 289 100% | 152 100% | 141 100% | 104 100% | 184 100% | 85 100% | 218 100% | 258 100% | 360 100% | 35 100% | 32 100% | 173 100% | 36 100% | 83 100% | 101 100% | 99 100% | 67 100% | 60 100% |
| Yes, in the past 3 months | 48 8% | 26 7% | 22 11% | 23 8% | 25 9% | 2 1% | 13 9% | 11 11% | 22 12% | 2 2% | 20 9% | 26 10% | 27 8% | 9 26% | 4 13% | 18 10% | 2 6% | 10 12% | 13 13% | 4 4% | 6 9% | 7 12% |
| Yes, in the past 6 months | 48 8% | 32 8% | 16 8% | 24 8% | 24 8% | 10 7% | 7 5% | 13 13% | 18 10% | 5 6% | 22 10% | 20 8% | 31 9% | 13 37% | 10 31% | 15 9% | 9 25% | 6 7% | 11 11% | 8 8% | 3 4% | 3 5% |
| Yes, in the past 12 months | 35 6% | 24 6% | 11 6% | 18 6% | 17 6% | 5 3% | 16 11% | 3 3% | 11 6% | 4 5% | 15 7% | 15 6% | 21 6% | 2 6% | 4 13% | 10 6% | 3 8% | 10 12% | 7 7% | 6 6% | 4 6% | 2 3% |
| Yes, in the past 2 years | 69 12% | 47 12% | 22 11% | 45 15% | 24 8% | 11 7% | 19 13% | 14 13% | 25 14% | 6 7% | 27 12% | 34 13% | 42 12% | 2 6% | 7 22% | 17 10% | 8 22% | 14 17% | 12 12% | 13 13% | 4 6% | 7 12% |
| No | 382 66% | 260 67% | 122 63% | 183 62% | 199 69% | 124 82% | 86 61% | 63 61% | 108 59% | 68 80% | 134 61% | 163 63% | 239 66% | 9 26% | 7 22% | 113 65% | 14 39% | 43 52% | 58 57% | 68 69% | 50 75% | 41 68% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Yes | 200 34% | 129 33% | 71 37% | 110 38% | 90 31% | 28 18% | 55 39% | 41 39% | 76 41% | 17 20% | 84 39% | 95 37% | 121 34% | 26 74% | 25 78% | 60 35% | 22 61% | 40 48% | 43 43% | 31 31% | 17 25% | 19 32% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q8b. And to what extent, if at all, has this instance of fraud had an impact on your company's brand?

Base: All who have been subject to any incidents of fraud recently

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | b | c | d | *a | b | c | a | *b | *c | d | *e | f | a | b | *c | *d | |
| Total | 200 | 129 | 71 | 110 | 90 | 28 | 55 | 41 | 76 | 17 | 84 | 95 | 121 | 26 | 25 | 60 | 22 | 40 | 43 | 31 | 17 | 19 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| To a great extent | 48 | 32 | 16 | 25 | 23 | 6 | 17 | 11 | 14 | 6 | 25 | 17 | 32 | 11 | 11 | 11 | 5 | 9 | 13 | 7 | 2 | 1 |
| | 24% | 25% | 23% | 23% | 26% | 21% | 31% | 27% | 18% | 35% | 30% | 18% | 26% | 42% | 44% | 18% | 23% | 23% | 30% | 23% | 12% | 5% |
| To some extent | 95 | 67 | 28 | 51 | 44 | 13 | 19 | 23 | 40 | 7 | 45 | 40 | 62 | 11 | 10 | 33 | 12 | 16 | 20 | 11 | 11 | 11 |
| | 48% | 52% | 39% | 46% | 49% | 46% | 35% | 56% | 53% | 41% | 54% | 42% | 51% | 42% | 40% | 55% | 55% | 40% | 47% | 35% | 65% | 58% |
| To no extent | 55 | 29 | 26 | 33 | 22 | 9 | 19 | 7 | 20 | 4 | 14 | 36 | 26 | 4 | 4 | 15 | 5 | 15 | 9 | 13 | 4 | 7 |
| | 28% | 22% | 37% | 30% | 24% | 32% | 35% | 17% | 26% | 24% | 17% | 38% | 21% | 15% | 16% | 25% | 23% | 38% | 21% | 42% | 24% | 37% |
| Don't know | 2 | 1 | 1 | 1 | 1 | - | - | - | 2 | - | - | 2 | 1 | - | - | 1 | - | - | 1 | - | - | - |
| | 1% | 1% | 1% | 1% | 1% | - | - | - | 3% | - | - | 2% | 1% | - | - | 2% | - | - | 2% | - | - | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q8b. And to what extent, if at all, has this instance of fraud had an impact on your company's brand?

Base: All who have been subject to any incidents of fraud recently (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | b | c | d | *a | b | c | a | *b | *c | d | *e | f | a | b | *c | *d | |
| Total | 198 | 128 | 70 | 109 | 89 | 28 | 55 | 41 | 74 | 17 | 84 | 93 | 120 | 26 | 25 | 59 | 22 | 40 | 42 | 31 | 17 | 19 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| To a great extent | 48 | 32 | 16 | 25 | 23 | 6 | 17 | 11 | 14 | 6 | 25 | 17 | 32 | 11 | 11 | 11 | 5 | 9 | 13 | 7 | 2 | 1 |
| | 24% | 25% | 23% | 23% | 26% | 21% | 31% | 27% | 19% | 35% | 30% | 18% | 27% | 42% | 44% | 19% | 23% | 23% | 31% | 23% | 12% | 5% |
| To some extent | 95 | 67 | 28 | 51 | 44 | 13 | 19 | 23 | 40 | 7 | 45 | 40 | 62 | 11 | 10 | 33 | 12 | 16 | 20 | 11 | 11 | 11 |
| | 48% | 52% | 40% | 47% | 49% | 46% | 35% | 56% | 54% | 41% | 54% | 43% | 52% | 42% | 40% | 56% | 55% | 40% | 48% | 35% | 65% | 58% |
| To no extent | 55 | 29 | 26 | 33 | 22 | 9 | 19 | 7 | 20 | 4 | 14 | 36 | 26 | 4 | 4 | 15 | 5 | 15 | 9 | 13 | 4 | 7 |
| | 28% | 23% | 37% | 30% | 25% | 32% | 35% | 17% | 27% | 24% | 17% | 39% | 22% | 15% | 16% | 25% | 23% | 38% | 21% | 42% | 24% | 37% |
| | | | a | | | | | b | | | b | | | | | | a | | | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q8c. And which of the following, if any, do you think contributed towards the fraud?

Base: All who have been subject to any incidents of fraud recently

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|-------------|-------------|------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub-Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 200 100% | 129 100% | 71 100% | 110 100% | 90 100% | 28 100% | 55 100% | 41 100% | 76 100% | 17 100% | 84 100% | 95 100% | 121 100% | 26 100% | 25 100% | 60 100% | 22 100% | 40 100% | 43 100% | 31 100% | 17 100% | 19 100% |
| Technology i.e. problems or issues around automation, artificial intelligence, data population | 62 31% | 44 34% | 18 25% | 34 31% | 28 31% | 7 25% | 19 35% | 18 44% | 18 24% | 2 12% | 31 37% | 27 28% | 40 33% | 8 31% | 7 28% | 16 27% | 6 27% | 13 33% | 17 40% | 8 26% | 5 29% | 3 16% |
| The monitoring tools did not pick up changes to the status of entities or individuals | 55 28% | 37 29% | 18 25% | 31 28% | 24 27% | 5 18% | 15 27% | 14 34% | 21 28% | 1 6% | 23 27% | 31 33% | 38 31% | 9 35% | 8 32% | 18 30% | 8 36% | 10 25% | 19 44% | 5 16% | 2 12% | 4 21% |
| We did not properly implement or understand the risk based/sensitive approach | 44 22% | 35 27% | 9 13% | 22 20% | 22 24% | 3 11% | 9 16% | 13 32% | 19 25% | 2 12% | 20 24% | 22 23% | 31 26% | 7 27% | 9 36% | 10 17% | 10 45% | 10 25% | 12 28% | 6 19% | 2 12% | 4 21% |
| There was a lack of a clear policy and related training | 44 22% | 29 22% | 15 21% | 23 21% | 21 23% | 3 11% | 15 27% | 11 27% | 15 20% | 4 24% | 20 24% | 18 19% | 28 23% | 7 27% | 9 36% | 14 23% | 9 41% | 9 23% | 11 26% | 10 32% | 3 18% | 3 16% |
| Manual processes | 40 20% | 29 22% | 11 15% | 28 25% | 12 13% | 3 11% | 10 18% | 6 15% | 21 28% | 4 24% | 10 12% | 25 26% | 23 19% | 3 12% | 6 24% | 8 13% | 6 27% | 12 30% | 9 21% | 9 29% | 3 18% | 4 21% |
| Business information data issues i.e. firmographic, company financials, beneficial ownership | 40 20% | 31 24% | 9 13% | 19 17% | 21 23% | 5 18% | 13 24% | 8 20% | 14 18% | 3 18% | 22 26% | 14 15% | 30 25% | 6 23% | 6 24% | 11 18% | 5 23% | 5 13% | 11 26% | 7 23% | 1 6% | 2 11% |
| We did not understand or interpret the regulations appropriately | 35 18% | 28 22% | 7 10% | 21 19% | 14 16% | 3 11% | 10 18% | 6 15% | 16 21% | 1 6% | 15 18% | 19 20% | 24 20% | 5 19% | 4 16% | 10 17% | 4 18% | 5 13% | 6 14% | 7 23% | 2 12% | 3 16% |
| Anti-bribery and corruption checks did not work as expected | 34 17% | 22 17% | 12 17% | 17 15% | 17 19% | 5 18% | 7 13% | 8 20% | 14 18% | 5 29% | 14 17% | 14 15% | 16 13% | 5 19% | 4 16% | 8 13% | 1 5% | 11 28% | 9 21% | 3 10% | 4 24% | - - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q8c. And which of the following, if any, do you think contributed towards the fraud?

Base: All who have been subject to any incidents of fraud recently

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|---|-------------|-------------|------------|-------------|-------------|---------------|------------|------------|-----------------|---------------------|--|----------------------|---------------------|---|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | b | c | d | *a | b | c | a | *b | *c | d | *e | f | a | b | *c | *d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 200 100% | 129 100% | 71 100% | 110 100% | 90 100% | 28 100% | 55 100% | 41 100% | 76 100% | 17 100% | 84 100% | 95 100% | 121 100% | 26 100% | 25 100% | 60 100% | 22 100% | 40 100% | 43 100% | 31 100% | 17 100% | 19 100% |
| We have a lack of resources | 32 16% | 19 15% | 13 18% | 14 13% | 18 20% | 4 14% | 7 13% | 9 22% | 12 16% | 6 35% | 13 15% | 11 12% | 13 11% | 6 23% | 5 20% | 10 17% | 4 18% | 12 30% | 7 16% | 3 10% | 4 24% | 5 26% |
| We did not understand or properly implement supplier due diligence | 31 16% | 22 17% | 9 13% | 18 16% | 13 14% | 6 21% | 6 11% | 7 17% | 12 16% | 3 18% | 15 18% | 13 14% | 18 15% | 6 23% | 5 20% | 12 20% | 5 23% | 7 18% | 5 12% | 5 16% | 5 29% | 2 11% |
| Not having complete adverse media checks | 28 14% | 20 16% | 8 11% | 13 12% | 15 17% | 4 14% | 5 9% | 10 24% | 9 12% | 2 12% | 16 19% | 10 11% | 18 15% | 7 27% | 4 16% | 9 15% | 4 18% | 5 13% | 4 9% | 1 3% | 3 18% | 6 32% |
| We did not understand or properly implement customer/vendor due diligence | 25 13% | 20 16% | 5 7% | 15 14% | 10 11% | 2 7% | 4 7% | 6 15% | 13 17% | - - | 12 14% | 13 14% | 16 13% | 2 8% | 2 8% | 5 8% | 3 14% | 7 18% | 5 12% | 4 13% | 2 12% | - - |
| Other | 6 3% | 2 2% | 4 6% | 4 4% | 2 2% | - - | 2 4% | - - | 4 5% | - - | - - | 6 6% | 2 2% | - - | 1 4% | 2 3% | - - | 1 3% | 2 5% | 1 3% | - - | 1 5% |
| None of the above | 8 4% | 5 4% | 3 4% | 4 4% | 4 4% | 2 7% | 2 4% | 1 2% | 3 4% | 1 6% | 4 5% | 3 3% | 3 2% | - - | 1 4% | 3 5% | 1 5% | 2 5% | 1 2% | 1 3% | - - | 1 5% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q8c. And which of the following, if any, do you think contributed towards the fraud?

Base: All who have been subject to any incidents of fraud recently (excluding none)

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|-------------|-------------|------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub-Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 192 100% | 124 100% | 68 100% | 106 100% | 86 100% | 26 100% | 53 100% | 40 100% | 73 100% | 16 100% | 80 100% | 92 100% | 118 100% | 26 100% | 24 100% | 57 100% | 21 100% | 38 100% | 42 100% | 30 100% | 17 100% | 18 100% |
| Technology i.e. problems or issues around automation, artificial intelligence, data population | 62 32% | 44 35% | 18 26% | 34 32% | 28 33% | 7 27% | 19 36% | 18 45% | 18 25% | 2 13% | 31 39% | 27 29% | 40 34% | 8 31% | 7 29% | 16 28% | 6 29% | 13 34% | 17 40% | 8 27% | 5 29% | 3 17% |
| The monitoring tools did not pick up changes to the status of entities or individuals | 55 29% | 37 30% | 18 26% | 31 29% | 24 28% | 5 19% | 15 28% | 14 35% | 21 29% | 1 6% | 23 29% | 31 34% | 38 32% | 9 35% | 8 33% | 18 32% | 8 38% | 10 26% | 19 45% | 5 17% | 2 12% | 4 22% |
| We did not properly implement or understand the risk based/sensitive approach | 44 23% | 35 28% | 9 13% | 22 21% | 22 26% | 3 12% | 9 17% | 13 33% | 19 26% | 2 13% | 20 25% | 22 24% | 31 26% | 7 27% | 9 38% | 10 18% | 10 48% | 10 26% | 12 29% | 6 20% | 2 12% | 4 22% |
| There was a lack of a clear policy and related training | 44 23% | 29 23% | 15 22% | 23 22% | 21 24% | 3 12% | 15 28% | 11 28% | 15 21% | 4 25% | 20 25% | 18 20% | 28 24% | 7 27% | 9 38% | 14 25% | 9 43% | 9 24% | 11 26% | 10 33% | 3 18% | 3 17% |
| Manual processes | 40 21% | 29 23% | 11 16% | 28 26% | 12 14% | 3 12% | 10 19% | 6 15% | 21 29% | 4 25% | 10 13% | 25 27% | 23 19% | 3 12% | 6 25% | 8 14% | 6 29% | 12 32% | 9 21% | 9 30% | 3 18% | 4 22% |
| Business information data issues i.e. firmographic, company financials, beneficial ownership | 40 21% | 31 25% | 9 13% | 19 18% | 21 24% | 5 19% | 13 25% | 8 20% | 14 19% | 3 19% | 22 28% | 14 15% | 30 25% | 6 23% | 6 25% | 11 19% | 5 24% | 5 13% | 11 26% | 7 23% | 1 6% | 2 11% |
| We did not understand or interpret the regulations appropriately | 35 18% | 28 23% | 7 10% | 21 20% | 14 16% | 3 12% | 10 19% | 6 15% | 16 22% | 1 6% | 15 19% | 19 21% | 24 20% | 5 19% | 4 17% | 10 18% | 4 19% | 5 13% | 6 14% | 7 23% | 2 12% | 3 17% |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q8c. And which of the following, if any, do you think contributed towards the fraud?

Base: All who have been subject to any incidents of fraud recently (excluding none)

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|---|-------------|-------------|------------|-------------|-------------|---------------|------------|------------|-----------------|---------------------|--|----------------------|---------------------|---|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 192 100% | 124 100% | 68 100% | 106 100% | 86 100% | 26 100% | 53 100% | 40 100% | 73 100% | 16 100% | 80 100% | 92 100% | 118 100% | 26 100% | 24 100% | 57 100% | 21 100% | 38 100% | 42 100% | 30 100% | 17 100% | 18 100% |
| Anti-bribery and corruption checks did not work as expected | 34 18% | 22 18% | 12 18% | 17 16% | 17 20% | 5 19% | 7 13% | 8 20% | 14 19% | 5 31% | 14 18% | 14 15% | 16 14% | 5 19% | 4 17% | 8 14% | 1 5% | 11 29% | 9 21% | 3 10% | 4 24% | - - |
| We have a lack of resources | 32 17% | 19 15% | 13 19% | 14 13% | 18 21% | 4 15% | 7 13% | 9 23% | 12 16% | 6 38% | 13 16% | 11 12% | 13 11% | 6 23% | 5 21% | 10 18% | 4 19% | 12 32% | 7 17% | 3 10% | 4 24% | 5 28% |
| We did not understand or properly implement supplier due diligence | 31 16% | 22 18% | 9 13% | 18 17% | 13 15% | 6 23% | 6 11% | 7 18% | 12 16% | 3 19% | 15 19% | 13 14% | 18 15% | 6 23% | 5 21% | 12 21% | 5 24% | 7 18% | 5 12% | 5 17% | 5 29% | 2 11% |
| Not having complete adverse media checks | 28 15% | 20 16% | 8 12% | 13 12% | 15 17% | 4 15% | 5 9% | 10 25% | 9 12% | 2 13% | 16 20% | 10 11% | 18 15% | 7 27% | 4 17% | 9 16% | 4 19% | 5 13% | 4 10% | 1 3% | 3 18% | 6 33% |
| We did not understand or properly implement customer/vendor due diligence | 25 13% | 20 16% | 5 7% | 15 14% | 10 12% | 2 8% | 4 8% | 6 15% | 13 18% | - - | 12 15% | 13 14% | 16 14% | 2 8% | 2 8% | 5 9% | 3 14% | 7 18% | 5 12% | 4 13% | 2 12% | - - |
| Other | 6 3% | 2 2% | 4 6% | 4 4% | 2 2% | - - | 2 4% | - - | 4 5% | - - | - - | 6 7% | 2 2% | - - | 1 4% | 2 4% | - - | 1 3% | 2 5% | 1 3% | - - | 1 6% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q9_SUM. To what extent do you feel that you have the resources that you need to comply with existing and new legislation?

SUMMARY TABLE

Base: All respondents

| | Total | More than enough | About the right amount | Nowhere near enough | Don't know |
|----------------------|-------|------------------|------------------------|---------------------|------------|
| New legislation | 617 | 130 | 354 | 82 | 51 |
| | 100% | 21% | 57% | 13% | 8% |
| Existing legislation | 617 | 137 | 403 | 55 | 22 |
| | 100% | 22% | 65% | 9% | 4% |

Compliance and Procurement Sentiment - Wave 2

Q9_1. To what extent do you feel that you have the resources that you need to comply with existing and new legislation?

New legislation

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| More than enough | 130 21% | 93 23% | 37 18% | 65 21% | 65 21% | 31 20% | 41 28% | 28 26% | 30 15% | 19 22% | 61 27% | 46 17% | 85 23% | 12 33% | 10 29% | 32 17% | 7 19% | 24 28% | 26 25% | 19 18% | 14 20% | 14 21% |
| About the right amount | 354 57% | 232 57% | 122 58% | 182 59% | 172 56% | 86 54% | 81 55% | 59 54% | 127 63% | 52 60% | 119 53% | 169 61% | 220 59% | 20 56% | 19 56% | 112 61% | 26 70% | 43 49% | 61 59% | 68 65% | 41 59% | 37 54% |
| Nowhere near enough | 82 13% | 43 11% | 39 19% | 45 15% | 37 12% | 17 11% | 17 12% | 16 15% | 32 16% | 6 7% | 31 14% | 42 15% | 40 11% | 3 8% | 4 12% | 30 16% | 4 11% | 13 15% | 14 13% | 13 12% | 6 9% | 10 15% |
| Don't know | 51 8% | 39 10% | 12 6% | 16 5% | 35 11% | 24 15% | 7 5% | 6 6% | 14 7% | 10 11% | 14 6% | 19 7% | 31 8% | 1 3% | 1 3% | 11 6% | - - | 7 8% | 3 3% | 5 5% | 8 12% | 7 10% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q9_2. To what extent do you feel that you have the resources that you need to comply with existing and new legislation?

Existing legislation

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| More than enough | 137 22% | 100 25% | 37 18% | 67 22% | 70 23% | 33 21% | 41 28% | 31 28% | 32 16% | 19 22% | 54 24% | 60 22% | 84 22% | 10 28% | 6 18% | 32 17% | 8 22% | 29 33% | 28 27% | 21 20% | 12 17% | 16 24% |
| About the right amount | 403 65% | 257 63% | 146 70% | 204 66% | 199 64% | 102 65% | 94 64% | 64 59% | 142 70% | 60 69% | 140 62% | 184 67% | 247 66% | 19 53% | 17 50% | 129 70% | 23 62% | 47 54% | 63 61% | 73 70% | 51 74% | 45 66% |
| Nowhere near enough | 55 9% | 33 8% | 22 10% | 30 10% | 25 8% | 11 7% | 9 6% | 10 9% | 25 12% | 5 6% | 23 10% | 24 9% | 32 9% | 7 19% | 11 32% | 19 10% | 6 16% | 8 9% | 12 12% | 8 8% | 1 1% | 6 9% |
| Don't know | 22 4% | 17 4% | 5 2% | 7 2% | 15 5% | 12 8% | 2 1% | 4 4% | 4 2% | 3 3% | 8 4% | 8 3% | 13 3% | - - | - - | 5 3% | - - | 3 3% | 1 1% | 3 3% | 5 7% | 1 1% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q9_SUM. To what extent do you feel that you have the resources that you need to comply with existing and new legislation?

SUMMARY TABLE

Base: All respondents (excluding don't know)

| | Total | More than enough | About the right amount | Nowhere near enough |
|----------------------|-------|------------------|------------------------|---------------------|
| New legislation | 566 | 130 | 354 | 82 |
| | 100% | 23% | 63% | 14% |
| Existing legislation | 595 | 137 | 403 | 55 |
| | 100% | 23% | 68% | 9% |

Compliance and Procurement Sentiment - Wave 2

Q9_1. To what extent do you feel that you have the resources that you need to comply with existing and new legislation?

New legislation

Base: All respondents (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 566 100% | 368 100% | 198 100% | 292 100% | 274 100% | 134 100% | 139 100% | 103 100% | 189 100% | 77 100% | 211 100% | 257 100% | 345 100% | 35 100% | 33 100% | 174 100% | 37 100% | 80 100% | 101 100% | 100 100% | 61 100% | 61 100% |
| More than enough | 130 23% | 93 25% | 37 19% | 65 22% | 65 24% | 31 23% | 41 29% | 28 27% | 30 16% | 19 25% | 61 29% | 46 18% | 85 25% | 12 34% | 10 30% | 32 18% | 7 19% | 24 30% | 26 26% | 19 19% | 14 23% | 14 23% |
| About the right amount | 354 63% | 232 63% | 122 62% | 182 62% | 172 63% | 86 64% | 81 58% | 59 57% | 127 67% | 52 68% | 119 56% | 169 66% | 220 64% | 20 57% | 19 58% | 112 64% | 26 70% | 43 54% | 61 60% | 68 68% | 41 67% | 37 61% |
| Nowhere near enough | 82 14% | 43 12% | 39 20% | 45 15% | 37 14% | 17 13% | 17 12% | 16 16% | 32 17% | 6 8% | 31 15% | 42 16% | 40 12% | 3 9% | 4 12% | 30 17% | 4 11% | 13 16% | 14 14% | 13 13% | 6 10% | 10 16% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q9_2. To what extent do you feel that you have the resources that you need to comply with existing and new legislation?

Existing legislation

Base: All respondents (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 595 | 390 | 205 | 301 | 294 | 146 | 144 | 105 | 199 | 84 | 217 | 268 | 363 | 36 | 34 | 180 | 37 | 84 | 103 | 102 | 64 | 67 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| More than enough | 137 | 100 | 37 | 67 | 70 | 33 | 41 | 31 | 32 | 19 | 54 | 60 | 84 | 10 | 6 | 32 | 8 | 29 | 28 | 21 | 12 | 16 |
| | 23% | 26% | 18% | 22% | 24% | 23% | 28% | 30% | 16% | 23% | 25% | 22% | 23% | 28% | 18% | 18% | 22% | 35% | 27% | 21% | 19% | 24% |
| | | b | | | | d | d | | | | | | | | | ad | | | | | | |
| About the right amount | 403 | 257 | 146 | 204 | 199 | 102 | 94 | 64 | 142 | 60 | 140 | 184 | 247 | 19 | 17 | 129 | 23 | 47 | 63 | 73 | 51 | 45 |
| | 68% | 66% | 71% | 68% | 68% | 70% | 65% | 61% | 71% | 71% | 65% | 69% | 68% | 53% | 50% | 72% | 62% | 56% | 61% | 72% | 80% | 67% |
| | | | | | | | | | | | | | cf | | | bcd | | | | | a | |
| Nowhere near enough | 55 | 33 | 22 | 30 | 25 | 11 | 9 | 10 | 25 | 5 | 23 | 24 | 32 | 7 | 11 | 19 | 6 | 8 | 12 | 8 | 1 | 6 |
| | 9% | 8% | 11% | 10% | 9% | 8% | 6% | 10% | 13% | 6% | 11% | 9% | 9% | 19% | 32% | 11% | 16% | 10% | 12% | 8% | 2% | 9% |
| | | | | | | | | | | | | | | a | adf | | | | c | | | |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q10. How much backing do you feel you have from internal stakeholders in your organisation to implement compliance related regulatory polices/ the best procurement practice policies derived from legislation?

Base: All respondents

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 617 | 407 | 210 | 308 | 309 | 158 | 146 | 109 | 203 | 87 | 225 | 276 | 376 | 36 | 34 | 185 | 37 | 87 | 104 | 105 | 69 | 68 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| More than enough | 138 | 97 | 41 | 65 | 73 | 33 | 42 | 25 | 38 | 22 | 56 | 57 | 84 | 14 | 9 | 36 | 6 | 26 | 30 | 17 | 14 | 10 |
| | 22% | 24% | 20% | 21% | 24% | 21% | 29% | 23% | 19% | 25% | 25% | 21% | 22% | 39% | 26% | 19% | 16% | 30% | 29% | 16% | 20% | 15% |
| About the right amount | 384 | 254 | 130 | 199 | 185 | 104 | 90 | 70 | 120 | 55 | 141 | 172 | 240 | 18 | 22 | 115 | 25 | 49 | 61 | 75 | 49 | 39 |
| | 62% | 62% | 62% | 65% | 60% | 66% | 62% | 64% | 59% | 63% | 63% | 62% | 64% | 50% | 65% | 62% | 68% | 56% | 59% | 71% | 71% | 57% |
| Nowhere near enough | 79 | 46 | 33 | 39 | 40 | 12 | 13 | 13 | 41 | 5 | 25 | 43 | 43 | 4 | 3 | 31 | 6 | 11 | 13 | 12 | 4 | 14 |
| | 13% | 11% | 16% | 13% | 13% | 8% | 9% | 12% | 20% | 6% | 11% | 16% | 11% | 11% | 9% | 17% | 16% | 13% | 13% | 11% | 6% | 21% |
| Prefer not to say | 16 | 10 | 6 | 5 | 11 | 9 | 1 | 1 | 4 | 5 | 3 | 4 | 9 | - | - | 3 | - | 1 | - | 1 | 2 | 5 |
| | 3% | 2% | 3% | 2% | 4% | 6% | 1% | 1% | 2% | 6% | 1% | 1% | 2% | - | - | 2% | - | 1% | - | 1% | 3% | 7% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q10. How much backing do you feel you have from internal stakeholders in your organisation to implement compliance related regulatory polices/ the best procurement practice policies derived from legislation?

Base: All respondents (excluding prefer not to say)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|------------------------|----------|------|----------|------------|---------------|------|--------|-----------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|--------|--------------------|---------------|--------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 601 | 397 | 204 | 303 | 298 | 149 | 145 | 108 | 199 | 82 | 222 | 272 | 367 | 36 | 34 | 182 | 37 | 86 | 104 | 104 | 67 | 63 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| More than enough | 138 | 97 | 41 | 65 | 73 | 33 | 42 | 25 | 38 | 22 | 56 | 57 | 84 | 14 | 9 | 36 | 6 | 26 | 30 | 17 | 14 | 10 |
| | 23% | 24% | 20% | 21% | 24% | 22% | 29% | 23% | 19% | 27% | 25% | 21% | 23% | 39% | 26% | 20% | 16% | 30% | 29% | 16% | 21% | 16% |
| About the right amount | 384 | 254 | 130 | 199 | 185 | 104 | 90 | 70 | 120 | 55 | 141 | 172 | 240 | 18 | 22 | 115 | 25 | 49 | 61 | 75 | 49 | 39 |
| | 64% | 64% | 64% | 66% | 62% | 70% | 62% | 65% | 60% | 67% | 64% | 63% | 65% | 50% | 65% | 63% | 68% | 57% | 59% | 72% | 73% | 62% |
| Nowhere near enough | 79 | 46 | 33 | 39 | 40 | 12 | 13 | 13 | 41 | 5 | 25 | 43 | 43 | 4 | 3 | 31 | 6 | 11 | 13 | 12 | 4 | 14 |
| | 13% | 12% | 16% | 13% | 13% | 8% | 9% | 12% | 21% | 6% | 11% | 16% | 12% | 11% | 9% | 17% | 16% | 13% | 13% | 12% | 6% | 22% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q11. You mentioned earlier that you work in both compliance and procurement. In your opinion, does undertaking both functions help you to do any of the following duties and tasks?

Base: All who work in both compliance and procurement

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|------------|------------|------------|-------------|---------------|------------|------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub-Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 147 100% | 97 100% | 50 100% | 95 100% | 52 100% | 51 100% | 45 100% | 25 100% | 26 100% | 28 100% | 71 100% | 44 100% | 93 100% | 3 100% | 10 100% | 41 100% | 8 100% | 25 100% | 24 100% | 25 100% | 21 100% | 6 100% |
| Process management | 83 56% | 54 56% | 29 58% | 50 53% | 33 63% | 31 61% | 26 58% | 12 48% | 14 54% | 13 46% | 46 65% | 23 52% | 52 56% | 2 67% | 6 60% | 28 68% | 7 88% | 12 48% | 9 38% | 15 60% | 12 57% | 3 50% |
| Vendor management | 79 54% | 57 59% | 22 44% | 46 48% | 33 63% | 23 45% | 26 58% | 12 48% | 18 69% | 13 46% | 40 56% | 26 59% | 50 54% | 1 33% | 7 70% | 18 44% | 4 50% | 18 72% | 16 67% | 14 56% | 15 71% | 3 50% |
| Developing and guiding policy and procedure (creating best practice) | 78 53% | 55 57% | 23 46% | 51 54% | 27 52% | 24 47% | 28 62% | 12 48% | 14 54% | 10 36% | 42 59% | 26 59% | 47 51% | - - | 3 30% | 21 51% | 4 50% | 16 64% | 10 42% | 16 64% | 15 71% | 3 50% |
| Data management | 76 52% | 49 51% | 27 54% | 53 56% | 23 44% | 24 47% | 24 53% | 17 68% | 11 42% | 12 43% | 43 61% | 20 45% | 46 49% | - - | 5 50% | 21 51% | 3 38% | 15 60% | 13 54% | 13 52% | 14 67% | 2 33% |
| Laws and regulation | 74 50% | 50 52% | 24 48% | 50 53% | 24 46% | 23 45% | 20 44% | 13 52% | 18 69% | 10 36% | 40 56% | 23 52% | 47 51% | 1 33% | 3 30% | 22 54% | 5 63% | 14 56% | 11 46% | 15 60% | 16 76% | 3 50% |
| Monitoring supplier performance | 70 48% | 43 44% | 27 54% | 38 40% | 32 62% | 26 51% | 25 56% | 9 36% | 10 38% | 14 50% | 38 54% | 18 41% | 37 40% | 1 33% | 5 50% | 20 49% | 3 38% | 17 68% | 11 46% | 13 52% | 15 71% | 2 33% |
| Supplier spend analysis | 60 41% | 36 37% | 24 48% | 35 37% | 25 48% | 15 29% | 24 53% | 10 40% | 11 42% | 8 29% | 34 48% | 18 41% | 34 37% | 1 33% | 4 40% | 20 49% | 4 50% | 13 52% | 10 42% | 14 56% | 12 57% | 2 33% |
| Market research and analysis | 58 39% | 43 44% | 15 30% | 37 39% | 21 40% | 14 27% | 22 49% | 13 52% | 9 35% | 8 29% | 34 48% | 16 36% | 37 40% | 1 33% | 3 30% | 14 34% | 2 25% | 10 40% | 10 42% | 11 44% | 10 48% | 2 33% |
| Generating internal buy-in | 45 31% | 25 26% | 20 40% | 27 28% | 18 35% | 12 24% | 13 29% | 10 40% | 10 38% | 3 11% | 27 38% | 15 34% | 23 25% | 2 67% | 5 50% | 13 32% | 2 25% | 13 52% | 6 25% | 9 36% | 7 33% | 1 17% |
| Other | 2 1% | 1 1% | 1 2% | 1 1% | 1 2% | 2 4% | - - | - - | - - | 2 7% | - - | - - | 1 1% | - - | - - | 1 2% | - - | - - | 1 4% | - - | - - | - - |
| None of the above, merging compliance and procurement functions does not help me in my job | 7 5% | 5 5% | 2 4% | 6 6% | 1 2% | 6 12% | - - | 1 4% | - - | 4 14% | - - | 1 2% | 4 4% | - - | - - | 1 2% | - - | 1 4% | 1 4% | 1 4% | - - | - - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q11. You mentioned earlier that you work in both compliance and procurement. In your opinion, does undertaking both functions help you to do any of the following duties and tasks?

Base: All who work in both compliance and procurement (excluding none)

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|------------|------------|------------|-------------|---------------|------------|------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 140 100% | 92 100% | 48 100% | 89 100% | 51 100% | 45 100% | 45 100% | 24 100% | 26 100% | 24 100% | 71 100% | 43 100% | 89 100% | 3 100% | 10 100% | 40 100% | 8 100% | 24 100% | 23 100% | 24 100% | 21 100% | 6 100% |
| Process management | 83 59% | 54 59% | 29 60% | 50 56% | 33 65% | 31 69% | 26 58% | 12 50% | 14 54% | 13 54% | 46 65% | 23 53% | 52 58% | 2 67% | 6 60% | 28 70% | 7 88% | 12 50% | 9 39% | 15 63% | 12 57% | 3 50% |
| Vendor management | 79 56% | 57 62% | 22 46% | 46 52% | 33 65% | 23 51% | 26 58% | 12 50% | 18 69% | 13 54% | 40 56% | 26 60% | 50 56% | 1 33% | 7 70% | 18 45% | 4 50% | 18 75% | 16 70% | 14 58% | 15 71% | 3 50% |
| Developing and guiding policy and procedure (creating best practice) | 78 56% | 55 60% | 23 48% | 51 57% | 27 53% | 24 53% | 28 62% | 12 50% | 14 54% | 10 42% | 42 59% | 26 60% | 47 53% | - - | 3 30% | 21 53% | 4 50% | 16 67% | 10 43% | 16 67% | 15 71% | 3 50% |
| Data management | 76 54% | 49 53% | 27 56% | 53 60% | 23 45% | 24 53% | 24 53% | 17 71% | 11 42% | 12 50% | 43 61% | 20 47% | 46 52% | - - | 5 50% | 21 53% | 3 38% | 15 63% | 13 57% | 13 54% | 14 67% | 2 33% |
| Laws and regulation | 74 53% | 50 54% | 24 50% | 50 56% | 24 47% | 23 51% | 20 44% | 13 54% | 18 69% | 10 42% | 40 56% | 23 53% | 47 53% | 1 33% | 3 30% | 22 55% | 5 63% | 14 58% | 11 48% | 15 63% | 16 76% | 3 50% |
| Monitoring supplier performance | 70 50% | 43 47% | 27 56% | 38 43% | 32 63% | 26 58% | 25 56% | 9 38% | 10 38% | 14 58% | 38 54% | 18 42% | 37 42% | 1 33% | 5 50% | 20 50% | 3 38% | 17 71% | 11 48% | 13 54% | 15 71% | 2 33% |
| Supplier spend analysis | 60 43% | 36 39% | 24 50% | 35 39% | 25 49% | 15 33% | 24 53% | 10 42% | 11 42% | 8 33% | 34 48% | 18 42% | 34 38% | 1 33% | 4 40% | 20 50% | 4 50% | 13 54% | 10 43% | 14 58% | 12 57% | 2 33% |
| Market research and analysis | 58 41% | 43 47% | 15 31% | 37 42% | 21 41% | 14 31% | 22 49% | 13 54% | 9 35% | 8 33% | 34 48% | 16 37% | 37 42% | 1 33% | 3 30% | 14 35% | 2 25% | 10 42% | 10 43% | 11 46% | 10 48% | 2 33% |
| Generating internal buy-in | 45 32% | 25 27% | 20 42% | 27 30% | 18 35% | 12 27% | 13 29% | 10 42% | 10 38% | 3 13% | 27 38% | 15 35% | 23 26% | 2 67% | 5 50% | 13 33% | 2 25% | 13 54% | 6 26% | 9 38% | 7 33% | 1 17% |
| Other | 2 1% | 1 1% | 1 2% | 1 1% | 1 2% | 2 4% | - - | - - | - - | 2 8% | - - | - - | 1 1% | - - | - - | 1 3% | - - | - - | 1 4% | - - | - - | - - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q11b. You mentioned earlier that you just work in compliance/ procurement, however others undertake both compliance and procurement responsibilities as part of a single role. To what extent, if at all, do you think that the merging of the compliance and procurement functions would have a positive, or negative, impact on your business?

Base: All who work in either compliance or procurement, but not both

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Very positive (5.0) | 77 16% | 53 17% | 24 15% | 32 15% | 45 18% | 15 14% | 22 22% | 15 18% | 25 14% | 8 14% | 32 21% | 34 15% | 50 18% | 11 33% | 9 38% | 24 17% | 8 28% | 9 15% | 17 21% | 11 14% | 6 13% | 11 18% |
| Fairly positive (4.0) | 179 38% | 129 42% | 50 31% | 82 38% | 97 38% | 33 31% | 40 40% | 36 43% | 70 40% | 20 34% | 61 40% | 92 40% | 117 41% | 13 39% | 9 38% | 45 31% | 11 38% | 26 42% | 27 34% | 35 44% | 21 44% | 21 34% |
| Neither positive nor negative (3.0) | 141 30% | 91 29% | 50 31% | 58 27% | 83 32% | 49 46% | 22 22% | 29 35% | 41 23% | 24 41% | 45 29% | 67 29% | 84 30% | 6 18% | 3 13% | 43 30% | 9 31% | 17 27% | 22 28% | 25 31% | 18 38% | 16 26% |
| Fairly negative (2.0) | 45 10% | 23 7% | 22 14% | 26 12% | 19 7% | 2 2% | 12 12% | 2 2% | 29 16% | 2 3% | 11 7% | 28 12% | 20 7% | 3 9% | 2 8% | 21 15% | 1 3% | 7 11% | 7 9% | 7 9% | 3 6% | 7 11% |
| Very negative (1.0) | 12 3% | 5 2% | 7 4% | 7 3% | 5 2% | 1 1% | 2 2% | 2 2% | 7 4% | 1 2% | 1 1% | 7 3% | 5 2% | - - | 1 4% | 5 3% | - - | 2 3% | 5 6% | 1 1% | - - | 2 3% |
| Don't know | 16 3% | 9 3% | 7 4% | 8 4% | 8 3% | 7 7% | 3 3% | - - | 5 3% | 4 7% | 4 3% | 4 2% | 7 2% | - - | - - | 6 4% | - - | 1 2% | 2 3% | 1 1% | - - | 5 8% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Positive | 256 54% | 182 59% | 74 46% | 114 54% | 142 55% | 48 45% | 62 61% | 51 61% | 95 54% | 28 47% | 93 60% | 126 54% | 167 59% | 24 73% | 18 75% | 69 48% | 19 66% | 35 56% | 44 55% | 46 58% | 27 56% | 32 52% |
| Net: Negative | 57 12% | 28 9% | 29 18% | 33 15% | 24 9% | 3 3% | 14 14% | 4 5% | 36 20% | 3 5% | 12 8% | 35 15% | 25 9% | 3 9% | 3 13% | 26 18% | 1 3% | 9 15% | 12 15% | 8 10% | 3 6% | 9 15% |
| Mean score | 3.58 | 3.67 | 3.41 | 3.52 | 3.63 | 3.59 | 3.69 | 3.71 | 3.45 | 3.58 | 3.75 | 3.52 | 3.68 | 3.97 | 3.96 | 3.45 | 3.90 | 3.54 | 3.56 | 3.61 | 3.63 | 3.56 |
| Standard deviation | .97 | .91 | 1.06 | 1.01 | .93 | .81 | 1.02 | .87 | 1.06 | .85 | .90 | .99 | .92 | .95 | 1.12 | 1.06 | .86 | .99 | 1.12 | .88 | .79 | 1.05 |
| Standard error | .05 | .05 | .09 | .07 | .06 | .08 | .10 | .10 | .08 | .12 | .07 | .07 | .06 | .17 | .23 | .09 | .16 | .13 | .13 | .10 | .11 | .14 |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q11b. You mentioned earlier that you just work in compliance/ procurement, however others undertake both compliance and procurement responsibilities as part of a single role. To what extent, if at all, do you think that the merging of the compliance and procurement functions would have a positive, or negative, impact on your business?

Base: All who work in either compliance or procurement, but not both (excluding don't know)

| | Total | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|-------------------------------------|-------------|-------------|-------------|-------------|-------------|---------------|------------|------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| Significance Level: 95% | | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d |
| Total | 454 100% | 301 100% | 153 100% | 205 100% | 249 100% | 100 100% | 98 100% | 84 100% | 172 100% | 55 100% | 150 100% | 228 100% | 276 100% | 33 100% | 24 100% | 138 100% | 29 100% | 61 100% | 78 100% | 79 100% | 48 100% | 57 100% |
| Very positive (5.0) | 77 17% | 53 18% | 24 16% | 32 16% | 45 18% | 15 15% | 22 22% | 15 18% | 25 15% | 8 15% | 32 21% | 34 15% | 50 18% | 11 33% | 9 38% | 24 17% | 8 28% | 9 15% | 17 22% | 11 14% | 6 13% | 11 19% |
| Fairly positive (4.0) | 179 39% | 129 43% | 50 33% | 82 40% | 97 39% | 33 33% | 40 41% | 36 43% | 70 41% | 20 36% | 61 41% | 92 40% | 117 42% | 13 39% | 9 38% | 45 33% | 11 38% | 26 43% | 27 35% | 35 44% | 21 44% | 21 37% |
| Neither positive nor negative (3.0) | 141 31% | 91 30% | 50 33% | 58 28% | 83 33% | 49 49% | 22 22% | 29 35% | 41 24% | 24 44% | 45 30% | 67 29% | 84 30% | 6 18% | 3 13% | 43 31% | 9 31% | 17 28% | 22 28% | 25 32% | 18 38% | 16 28% |
| Fairly negative (2.0) | 45 10% | 23 8% | 22 14% | 26 13% | 19 8% | 2 2% | 12 12% | 2 2% | 29 17% | 2 4% | 11 7% | 28 12% | 20 7% | 3 9% | 2 8% | 21 15% | 1 3% | 7 11% | 7 9% | 7 9% | 3 6% | 7 12% |
| Very negative (1.0) | 12 3% | 5 2% | 7 5% | 7 3% | 5 2% | 1 1% | 2 2% | 2 2% | 7 4% | 1 2% | 1 1% | 7 3% | 5 2% | - - | 1 4% | 5 4% | - - | 2 3% | 5 6% | 1 1% | - - | 2 4% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Positive | 256 56% | 182 60% | 74 48% | 114 56% | 142 57% | 48 48% | 62 63% | 51 61% | 95 55% | 28 51% | 93 62% | 126 55% | 167 61% | 24 73% | 18 75% | 69 50% | 19 66% | 35 57% | 44 56% | 46 58% | 27 56% | 32 56% |
| Net: Negative | 57 13% | 28 9% | 29 19% | 33 16% | 24 10% | 3 3% | 14 14% | 4 5% | 36 21% | 3 5% | 12 8% | 35 15% | 25 9% | 3 9% | 3 13% | 26 19% | 1 3% | 9 15% | 12 15% | 8 10% | 3 6% | 9 16% |
| Mean score | 3.58 | 3.67 | 3.41 | 3.52 | 3.63 | 3.59 | 3.69 | 3.71 | 3.45 | 3.58 | 3.75 | 3.52 | 3.68 | 3.97 | 3.96 | 3.45 | 3.90 | 3.54 | 3.56 | 3.61 | 3.63 | 3.56 |
| Standard deviation | .97 | .91 | 1.06 | 1.01 | .93 | .81 | 1.02 | .87 | 1.06 | .85 | .90 | .99 | .92 | .95 | 1.12 | 1.06 | .86 | .99 | 1.12 | .88 | .79 | 1.05 |
| Standard error | .05 | .05 | .09 | .07 | .06 | .08 | .10 | .10 | .08 | .12 | .07 | .07 | .06 | .17 | .23 | .09 | .16 | .13 | .13 | .10 | .11 | .14 |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_SUM. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

SUMMARY TABLE

Base: All who work in either compliance or procurement, but not both

| | Total | Positive impact | No impact | Negative impact | Don't know |
|--|-------------|-----------------|------------|-----------------|------------|
| Developing and guiding policy and procedure (creating best practice) | 470 100% | 259 55% | 139 30% | 45 10% | 27 6% |
| Monitoring supplier performance | 470 100% | 235 50% | 162 34% | 42 9% | 31 7% |
| Data management | 470 100% | 232 49% | 171 36% | 41 9% | 26 6% |
| Process management | 470 100% | 231 49% | 159 34% | 48 10% | 32 7% |
| Market research and analysis | 470 100% | 217 46% | 179 38% | 38 8% | 36 8% |
| Vendor management | 470 100% | 216 46% | 178 38% | 40 9% | 36 8% |
| Laws and regulation | 470 100% | 210 45% | 161 34% | 62 13% | 37 8% |
| Supplier spend analysis | 470 100% | 199 42% | 195 41% | 33 7% | 43 9% |
| Generating internal buy-in | 470 100% | 184 39% | 192 41% | 41 9% | 53 11% |

Compliance and Procurement Sentiment - Wave 2

Q12_1. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Generating internal buy-in

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 184 39% | 125 40% | 59 37% | 82 38% | 102 40% | 29 27% | 42 42% | 36 43% | 77 44% | 17 29% | 69 45% | 93 40% | 112 40% | 13 39% | 10 42% | 58 40% | 15 52% | 30 48% | 34 43% | 30 38% | 20 42% | 23 37% |
| No impact | 192 41% | 121 39% | 71 44% | 77 36% | 115 45% | 51 48% | 41 41% | 35 42% | 65 37% | 26 44% | 63 41% | 99 43% | 116 41% | 15 45% | 9 38% | 59 41% | 12 41% | 22 35% | 32 40% | 38 48% | 19 40% | 21 34% |
| Negative impact | 41 9% | 27 9% | 14 9% | 27 13% | 14 5% | 9 8% | 6 6% | 8 10% | 18 10% | 4 7% | 13 8% | 19 8% | 25 9% | 4 12% | 5 21% | 12 8% | - - | 4 6% | 8 10% | 5 6% | 4 8% | 6 10% |
| Don't know | 53 11% | 37 12% | 16 10% | 27 13% | 26 10% | 18 17% | 12 12% | 5 6% | 17 10% | 12 20% | 9 6% | 21 9% | 30 11% | 1 3% | - - | 15 10% | 2 7% | 6 10% | 6 8% | 7 9% | 5 10% | 12 19% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_2. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Laws and regulation

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 210 45% | 147 47% | 63 39% | 101 47% | 109 42% | 37 35% | 49 49% | 38 45% | 86 49% | 19 32% | 73 47% | 109 47% | 129 46% | 15 45% | 10 42% | 61 42% | 15 52% | 31 50% | 38 48% | 36 45% | 19 40% | 26 42% |
| No impact | 161 34% | 100 32% | 61 38% | 75 35% | 86 33% | 46 43% | 31 31% | 29 35% | 54 31% | 24 41% | 59 38% | 73 31% | 99 35% | 12 36% | 10 42% | 53 37% | 12 41% | 20 32% | 29 36% | 24 30% | 19 40% | 16 26% |
| Negative impact | 62 13% | 38 12% | 24 15% | 23 11% | 39 15% | 11 10% | 13 13% | 12 14% | 26 15% | 9 15% | 14 9% | 35 15% | 35 12% | 4 12% | 4 17% | 19 13% | 1 3% | 8 13% | 10 13% | 15 19% | 5 10% | 9 15% |
| Don't know | 37 8% | 25 8% | 12 8% | 14 7% | 23 9% | 13 12% | 8 8% | 5 6% | 11 6% | 7 12% | 8 5% | 15 6% | 20 7% | 2 6% | - | 11 8% | 1 3% | 3 5% | 3 4% | 5 6% | 5 10% | 11 18% ab |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_3. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Market research and analysis

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 217 46% | 151 49% | 66 41% | 94 44% | 123 48% | 47 44% | 46 46% | 46 55% | 78 44% | 24 41% | 84 55% | 98 42% | 131 46% | 19 58% | 13 54% | 64 44% | 12 41% | 30 48% | 43 54% | 32 40% | 22 46% | 27 44% |
| No impact | 179 38% | 110 35% | 69 43% | 79 37% | 100 39% | 43 40% | 39 39% | 29 35% | 67 38% | 27 46% | 47 31% | 101 44% | 109 39% | 12 36% | 8 33% | 57 40% | 13 45% | 24 39% | 26 33% | 38 48% | 19 40% | 19 31% |
| Negative impact | 38 8% | 22 7% | 16 10% | 22 10% | 16 6% | 5 5% | 9 9% | 6 7% | 18 10% | 1 2% | 15 10% | 17 7% | 21 7% | 2 6% | 1 4% | 16 11% | 2 7% | 3 5% | 6 8% | 6 8% | 4 8% | 7 11% |
| Don't know | 36 8% | 27 9% | 9 6% | 18 8% | 18 7% | 12 11% | 7 7% | 3 4% | 14 8% | 7 12% | 8 5% | 16 7% | 22 8% | - - | 2 8% | 7 5% | 2 7% | 5 8% | 5 6% | 4 5% | 3 6% | 9 15% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_4. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Vendor management

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 216 46% | 155 50% | 61 38% | 93 44% | 123 48% | 40 37% | 51 50% | 37 44% | 88 50% | 23 39% | 82 53% | 103 44% | 136 48% | 18 55% | 11 46% | 59 41% | 15 52% | 32 52% | 37 46% | 45 56% | 18 38% | 23 37% |
| No impact | 178 38% | 107 35% | 71 44% | 83 39% | 95 37% | 45 42% | 36 36% | 39 46% | 57 32% | 26 44% | 52 34% | 92 40% | 109 39% | 12 36% | 7 29% | 64 44% | 13 45% | 16 26% | 33 41% | 24 30% | 21 44% | 25 40% |
| Negative impact | 40 9% | 23 7% | 17 11% | 21 10% | 19 7% | 8 7% | 8 8% | 6 7% | 18 10% | 2 3% | 14 9% | 22 9% | 19 7% | 3 9% | 3 13% | 13 9% | - - | 8 13% | 6 8% | 9 11% | 3 6% | 5 8% |
| Don't know | 36 8% | 25 8% | 11 7% | 16 8% | 20 8% | 14 13% | 6 6% | 2 2% | 14 8% | 8 14% | 6 4% | 15 6% | 19 7% | - - | 3 13% | 8 6% | 1 3% | 6 10% | 4 5% | 2 3% | 6 13% | 9 15% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_5. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Process management

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 231 49% | 161 52% | 70 44% | 105 49% | 126 49% | 45 42% | 51 50% | 43 51% | 92 52% | 24 41% | 80 52% | 116 50% | 148 52% | 16 48% | 12 50% | 60 42% | 17 59% | 36 58% | 43 54% | 43 54% | 25 52% | 26 42% |
| No impact | 159 34% | 95 31% | 64 40% | 69 32% | 90 35% | 44 41% | 33 33% | 32 38% | 50 28% | 24 41% | 55 36% | 77 33% | 94 33% | 13 39% | 7 29% | 60 42% | 11 38% | 16 26% | 29 36% | 27 34% | 19 40% | 15 24% |
| Negative impact | 48 10% | 32 10% | 16 10% | 24 11% | 24 9% | 7 7% | 8 8% | 9 11% | 24 14% | 4 7% | 13 8% | 27 12% | 25 9% | 4 12% | 3 13% | 14 10% | - - | 8 13% | 5 6% | 8 10% | 2 4% | 9 15% |
| Don't know | 32 7% | 22 7% | 10 6% | 15 7% | 17 7% | 11 10% | 9 9% | - - | 11 6% | 7 12% | 6 4% | 12 5% | 16 6% | - - | 2 8% | 10 7% | 1 3% | 2 3% | 3 4% | 2 3% | 2 4% | 12 19% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_6. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Data management

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 232 49% | 166 54% | 66 41% | 101 47% | 131 51% | 41 38% | 54 53% | 46 55% | 90 51% | 24 41% | 84 55% | 114 49% | 149 53% | 20 61% | 13 54% | 61 42% | 13 45% | 34 55% | 45 56% | 37 46% | 24 50% | 27 44% |
| No impact | 171 36% | 102 33% | 69 43% | 79 37% | 92 36% | 46 43% | 33 33% | 32 38% | 60 34% | 25 42% | 49 32% | 93 40% | 96 34% | 9 27% | 8 33% | 60 42% | 15 52% | 24 39% | 28 35% | 33 41% | 17 35% | 18 29% |
| Negative impact | 41 9% | 24 8% | 17 11% | 19 9% | 22 9% | 9 8% | 8 8% | 6 7% | 18 10% | 3 5% | 17 11% | 15 6% | 25 9% | 4 12% | 2 8% | 16 11% | - - | 1 2% | 3 4% | 8 10% | 5 10% | 9 15% |
| Don't know | 26 6% | 18 6% | 8 5% | 14 7% | 12 5% | 11 10% | 6 6% | - - | 9 5% | 7 12% | 4 3% | 10 4% | 13 5% | - - | 1 4% | 7 5% | 1 3% | 3 5% | 4 5% | 2 3% | 2 4% | 8 13% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_7. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Developing and guiding policy and procedure (creating best practice)

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 259 55% | 181 58% | 78 49% | 117 55% | 142 55% | 49 46% | 57 56% | 44 52% | 108 61% | 24 41% | 92 60% | 132 57% | 161 57% | 21 64% | 11 46% | 70 49% | 22 76% | 44 71% | 48 60% | 47 59% | 24 50% | 30 48% |
| No impact | 139 30% | 80 26% | 59 37% | 62 29% | 77 30% | 42 39% | 29 29% | 27 32% | 41 23% | 27 46% | 43 28% | 66 28% | 81 29% | 10 30% | 9 38% | 53 37% | 6 21% | 10 16% | 25 31% | 24 30% | 20 42% | 15 24% |
| Negative impact | 45 10% | 32 10% | 13 8% | 23 11% | 22 9% | 6 6% | 8 8% | 11 13% | 20 11% | 1 2% | 14 9% | 25 11% | 28 10% | 2 6% | 3 13% | 12 8% | - - | 6 10% | 4 5% | 6 8% | 2 4% | 9 15% |
| Don't know | 27 6% | 17 5% | 10 6% | 11 5% | 16 6% | 10 9% | 7 7% | 2 2% | 8 5% | 7 12% | 5 3% | 9 4% | 13 5% | - - | 1 4% | 9 6% | 1 3% | 2 3% | 3 4% | 3 4% | 2 4% | 8 13% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_8. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Monitoring supplier performance

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 235 50% | 168 54% | 67 42% | 104 49% | 131 51% | 44 41% | 53 52% | 43 51% | 94 53% | 23 39% | 82 53% | 118 51% | 146 52% | 17 52% | 11 46% | 64 44% | 17 59% | 34 55% | 41 51% | 42 53% | 20 42% | 32 52% |
| No impact | 162 34% | 93 30% | 69 43% | 74 35% | 88 34% | 39 36% | 38 38% | 35 42% | 50 28% | 24 41% | 56 36% | 79 34% | 94 33% | 12 36% | 7 29% | 61 42% | 10 34% | 18 29% | 30 38% | 24 30% | 20 42% | 15 24% |
| Negative impact | 42 9% | 25 8% | 17 11% | 21 10% | 21 8% | 10 9% | 4 4% | 6 7% | 22 12% | 3 5% | 10 6% | 24 10% | 23 8% | 4 12% | 4 17% | 13 9% | 1 3% | 7 11% | 6 8% | 11 14% | 4 8% | 7 11% |
| Don't know | 31 7% | 24 8% | 7 4% | 14 7% | 17 7% | 14 13% | 6 6% | - - | 11 6% | 9 15% | 6 4% | 11 5% | 20 7% | - - | 2 8% | 6 4% | 1 3% | 3 5% | 3 4% | 3 4% | 4 8% | 8 13% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_9. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Supplier spend analysis

Base: All who work in either compliance or procurement, but not both

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 470 100% | 310 100% | 160 100% | 213 100% | 257 100% | 107 100% | 101 100% | 84 100% | 177 100% | 59 100% | 154 100% | 232 100% | 283 100% | 33 100% | 24 100% | 144 100% | 29 100% | 62 100% | 80 100% | 80 100% | 48 100% | 62 100% |
| Positive impact | 199 42% | 142 46% | 57 36% | 87 41% | 112 44% | 34 32% | 52 51% | 38 45% | 75 42% | 21 36% | 79 51% | 94 41% | 125 44% | 17 52% | 13 54% | 53 37% | 14 48% | 31 50% | 35 44% | 37 46% | 20 42% | 22 35% |
| No impact | 195 41% | 114 37% | 81 51% | 88 41% | 107 42% | 53 50% | 38 38% | 36 43% | 67 38% | 27 46% | 58 38% | 102 44% | 112 40% | 14 42% | 8 33% | 68 47% | 13 45% | 24 39% | 37 46% | 34 43% | 18 38% | 21 34% |
| Negative impact | 33 7% | 22 7% | 11 7% | 16 8% | 17 7% | 5 5% | 6 6% | 6 7% | 16 9% | 4 7% | 9 6% | 18 8% | 18 6% | 2 6% | 2 8% | 13 9% | 1 3% | 3 5% | 4 5% | 6 8% | 4 8% | 6 10% |
| Don't know | 43 9% | 32 10% | 11 7% | 22 10% | 21 8% | 15 14% | 5 5% | 4 5% | 19 11% | 7 12% | 8 5% | 18 8% | 28 10% | - | 1 4% | 10 7% | 1 3% | 4 6% | 4 5% | 3 4% | 6 13% | 13 21% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q12_SUM. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

SUMMARY TABLE

Base: All who work in either compliance or procurement, but not both (excluding don't know)

| | Total | Positive impact | No impact | Negative impact | Don't know |
|--|-------------|-----------------|------------|-----------------|------------|
| Developing and guiding policy and procedure (creating best practice) | 443 100% | 259 58% | 139 31% | 45 10% | - - |
| Monitoring supplier performance | 439 100% | 235 54% | 162 37% | 42 10% | - - |
| Data management | 444 100% | 232 52% | 171 39% | 41 9% | - - |
| Process management | 438 100% | 231 53% | 159 36% | 48 11% | - - |
| Market research and analysis | 434 100% | 217 50% | 179 41% | 38 9% | - - |
| Vendor management | 434 100% | 216 50% | 178 41% | 40 9% | - - |
| Laws and regulation | 433 100% | 210 48% | 161 37% | 62 14% | - - |
| Supplier spend analysis | 427 100% | 199 47% | 195 46% | 33 8% | - - |
| Generating internal buy-in | 417 100% | 184 44% | 192 46% | 41 10% | - - |

Compliance and Procurement Sentiment - Wave 2

Q12_1. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Generating internal buy-in

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 417 100% | 273 100% | 144 100% | 186 100% | 231 100% | 89 100% | 89 100% | 79 100% | 160 100% | 47 100% | 145 100% | 211 100% | 253 100% | 32 100% | 24 100% | 129 100% | 27 100% | 56 100% | 74 100% | 73 100% | 43 100% | 50 100% |
| Positive impact | 184 44% | 125 46% | 59 41% | 82 44% | 102 44% | 29 33% | 42 47% | 36 46% | 77 48% | 17 36% | 69 48% | 93 44% | 112 44% | 13 41% | 10 42% | 58 45% | 15 56% | 30 54% | 34 46% | 30 41% | 20 47% | 23 46% |
| No impact | 192 46% | 121 44% | 71 49% | 77 41% | 115 50% | 51 57% | 41 46% | 35 44% | 65 41% | 26 55% | 63 43% | 99 47% | 116 46% | 15 47% | 9 38% | 59 46% | 12 44% | 22 39% | 32 43% | 38 52% | 19 44% | 21 42% |
| Negative impact | 41 10% | 27 10% | 14 10% | 27 15% | 14 6% | 9 10% | 6 7% | 8 10% | 18 11% | 4 9% | 13 9% | 19 9% | 25 10% | 4 13% | 5 21% | 12 9% | - - | 4 7% | 8 11% | 5 7% | 4 9% | 6 12% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_2. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Laws and regulation

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 433 100% | 285 100% | 148 100% | 199 100% | 234 100% | 94 100% | 93 100% | 79 100% | 166 100% | 52 100% | 146 100% | 217 100% | 263 100% | 31 100% | 24 100% | 133 100% | 28 100% | 59 100% | 77 100% | 75 100% | 43 100% | 51 100% |
| Positive impact | 210 48% | 147 52% | 63 43% | 101 51% | 109 47% | 37 39% | 49 53% | 38 48% | 86 52% | 19 37% | 73 50% | 109 50% | 129 49% | 15 48% | 10 42% | 61 46% | 15 54% | 31 53% | 38 49% | 36 48% | 19 44% | 26 51% |
| No impact | 161 37% | 100 35% | 61 41% | 75 38% | 86 37% | 46 49% | 31 33% | 29 37% | 54 33% | 24 46% | 59 40% | 73 34% | 99 38% | 12 39% | 10 42% | 53 40% | 12 43% | 20 34% | 29 38% | 24 32% | 19 44% | 16 31% |
| Negative impact | 62 14% | 38 13% | 24 16% | 23 12% | 39 17% | 11 12% | 13 14% | 12 15% | 26 16% | 9 17% | 14 10% | 35 16% | 35 13% | 4 13% | 4 17% | 19 14% | 1 4% | 8 14% | 10 13% | 15 20% | 5 12% | 9 18% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q12_3. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Market research and analysis

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 434 100% | 283 100% | 151 100% | 195 100% | 239 100% | 95 100% | 94 100% | 81 100% | 163 100% | 52 100% | 146 100% | 216 100% | 261 100% | 33 100% | 22 100% | 137 100% | 27 100% | 57 100% | 75 100% | 76 100% | 45 100% | 53 100% |
| Positive impact | 217 50% | 151 53% | 66 44% | 94 48% | 123 51% | 47 49% | 46 49% | 46 57% | 78 48% | 24 46% | 84 58% | 98 45% | 131 50% | 19 58% | 13 59% | 64 47% | 12 44% | 30 53% | 43 57% | 32 42% | 22 49% | 27 51% |
| No impact | 179 41% | 110 39% | 69 46% | 79 41% | 100 42% | 43 45% | 39 41% | 29 36% | 67 41% | 27 52% | 47 32% | 101 47% | 109 42% | 12 36% | 8 36% | 57 42% | 13 48% | 24 42% | 26 35% | 38 50% | 19 42% | 19 36% |
| Negative impact | 38 9% | 22 8% | 16 11% | 22 11% | 16 7% | 5 5% | 9 10% | 6 7% | 18 11% | 1 2% | 15 10% | 17 8% | 21 8% | 2 6% | 1 5% | 16 12% | 2 7% | 3 5% | 6 8% | 6 8% | 4 9% | 7 13% |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_4. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Vendor management

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 434 100% | 285 100% | 149 100% | 197 100% | 237 100% | 93 100% | 95 100% | 82 100% | 163 100% | 51 100% | 148 100% | 217 100% | 264 100% | 33 100% | 21 100% | 136 100% | 28 100% | 56 100% | 76 100% | 78 100% | 42 100% | 53 100% |
| Positive impact | 216 50% | 155 54% | 61 41% | 93 47% | 123 52% | 40 43% | 51 54% | 37 45% | 88 54% | 23 45% | 82 55% | 103 47% | 136 52% | 18 55% | 11 52% | 59 43% | 15 54% | 32 57% | 37 49% | 45 58% | 18 43% | 23 43% |
| No impact | 178 41% | 107 38% | 71 48% | 83 42% | 95 40% | 45 48% | 36 38% | 39 48% | 57 35% | 26 51% | 52 35% | 92 42% | 109 41% | 12 36% | 7 33% | 64 47% | 13 46% | 16 29% | 33 43% | 24 31% | 21 50% | 25 47% |
| Negative impact | 40 9% | 23 8% | 17 11% | 21 11% | 19 8% | 8 9% | 8 8% | 6 7% | 18 11% | 2 4% | 14 9% | 22 10% | 19 7% | 3 9% | 3 14% | 13 10% | - | 8 14% | 6 8% | 9 12% | 3 7% | 5 9% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_5. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Process management

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 438 100% | 288 100% | 150 100% | 198 100% | 240 100% | 96 100% | 92 100% | 84 100% | 166 100% | 52 100% | 148 100% | 220 100% | 267 100% | 33 100% | 22 100% | 134 100% | 28 100% | 60 100% | 77 100% | 78 100% | 46 100% | 50 100% |
| Positive impact | 231 53% | 161 56% | 70 47% | 105 53% | 126 53% | 45 47% | 51 55% | 43 51% | 92 55% | 24 46% | 80 54% | 116 53% | 148 55% | 16 48% | 12 55% | 60 45% | 17 61% | 36 60% | 43 56% | 43 55% | 25 54% | 26 52% |
| No impact | 159 36% | 95 33% | 64 43% | 69 35% | 90 38% | 44 46% | 33 36% | 32 38% | 50 30% | 24 46% | 55 37% | 77 35% | 94 35% | 13 39% | 7 32% | 60 45% | 11 39% | 16 27% | 29 38% | 27 35% | 19 41% | 15 30% |
| Negative impact | 48 11% | 32 11% | 16 11% | 24 12% | 24 10% | 7 7% | 8 9% | 9 11% | 24 14% | 4 8% | 13 9% | 27 12% | 25 9% | 4 12% | 3 14% | 14 10% | - - | 8 13% | 5 6% | 8 10% | 2 4% | 9 18% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_6. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Data management

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 444 100% | 292 100% | 152 100% | 199 100% | 245 100% | 96 100% | 95 100% | 84 100% | 168 100% | 52 100% | 150 100% | 222 100% | 270 100% | 33 100% | 23 100% | 137 100% | 28 100% | 59 100% | 76 100% | 78 100% | 46 100% | 54 100% |
| Positive impact | 232 52% | 166 57% | 66 43% | 101 51% | 131 53% | 41 43% | 54 57% | 46 55% | 90 54% | 24 46% | 84 56% | 114 51% | 149 55% | 20 61% | 13 57% | 61 45% | 13 46% | 34 58% | 45 59% | 37 47% | 24 52% | 27 50% |
| No impact | 171 39% | 102 35% | 69 45% | 79 40% | 92 38% | 46 48% | 33 35% | 32 38% | 60 36% | 25 48% | 49 33% | 93 42% | 96 36% | 9 27% | 8 35% | 60 44% | 15 54% | 24 41% | 28 37% | 33 42% | 17 37% | 18 33% |
| Negative impact | 41 9% | 24 8% | 17 11% | 19 10% | 22 9% | 9 9% | 8 8% | 6 7% | 18 11% | 3 6% | 17 11% | 15 7% | 25 9% | 4 12% | 2 9% | 16 12% | - - | 1 2% | 3 4% | 8 10% | 5 11% | 9 17% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_7. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Developing and guiding policy and procedure (creating best practice)

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|--|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 443 100% | 293 100% | 150 100% | 202 100% | 241 100% | 97 100% | 94 100% | 82 100% | 169 100% | 52 100% | 149 100% | 223 100% | 270 100% | 33 100% | 23 100% | 135 100% | 28 100% | 60 100% | 77 100% | 77 100% | 46 100% | 54 100% |
| Positive impact | 259 58% | 181 62% | 78 52% | 117 58% | 142 59% | 49 51% | 57 61% | 44 54% | 108 64% | 24 46% | 92 62% | 132 59% | 161 60% | 21 64% | 11 48% | 70 52% | 22 79% | 44 73% | 48 62% | 47 61% | 24 52% | 30 56% |
| No impact | 139 31% | 80 27% | 59 39% | 62 31% | 77 32% | 42 43% | 29 31% | 27 33% | 41 24% | 27 52% | 43 29% | 66 30% | 81 30% | 10 30% | 9 39% | 53 39% | 6 21% | 10 17% | 25 32% | 24 31% | 20 43% | 15 28% |
| Negative impact | 45 10% | 32 11% | 13 9% | 23 11% | 22 9% | 6 6% | 8 9% | 11 13% | 20 12% | 1 2% | 14 9% | 25 11% | 28 10% | 2 6% | 3 13% | 12 9% | - - | 6 10% | 4 5% | 6 8% | 2 4% | 9 17% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_8. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Monitoring supplier performance

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|---|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 439 100% | 286 100% | 153 100% | 199 100% | 240 100% | 93 100% | 95 100% | 84 100% | 166 100% | 50 100% | 148 100% | 221 100% | 263 100% | 33 100% | 22 100% | 138 100% | 28 100% | 59 100% | 77 100% | 77 100% | 44 100% | 54 100% |
| Positive impact | 235 54% | 168 59% | 67 44% | 104 52% | 131 55% | 44 47% | 53 56% | 43 51% | 94 57% | 23 46% | 82 55% | 118 53% | 146 56% | 17 52% | 11 50% | 64 46% | 17 61% | 34 58% | 41 53% | 42 55% | 20 45% | 32 59% |
| No impact | 162 37% | 93 33% | 69 45% | 74 37% | 88 37% | 39 42% | 38 40% | 35 42% | 50 30% | 24 48% | 56 38% | 79 36% | 94 36% | 12 36% | 7 32% | 61 44% | 10 36% | 18 31% | 30 39% | 24 31% | 20 45% | 15 28% |
| Negative impact | 42 10% | 25 9% | 17 11% | 21 11% | 21 9% | 10 11% | 4 4% | 6 7% | 22 13% | 3 6% | 10 7% | 24 11% | 23 9% | 4 12% | 4 18% | 13 9% | 1 4% | 7 12% | 6 8% | 11 14% | 4 9% | 7 13% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q12_9. And now thinking specifically about the duties and tasks that you undertake, would the merging of the compliance and procurement functions have a positive, negative or no impact on each of the following?

Supplier spend analysis

Base: All who work in either compliance or procurement, but not both (excluding don't know)

Significance Level: 95%

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-----------------|-------------|-------------|-------------|-------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|---|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Total | 427 100% | 278 100% | 149 100% | 191 100% | 236 100% | 92 100% | 96 100% | 80 100% | 158 100% | 52 100% | 146 100% | 214 100% | 255 100% | 33 100% | 23 100% | 134 100% | 28 100% | 58 100% | 76 100% | 77 100% | 42 100% | 49 100% |
| Positive impact | 199 47% | 142 51% | 57 38% | 87 46% | 112 47% | 34 37% | 52 54% | 38 48% | 75 47% | 21 40% | 79 54% | 94 44% | 125 49% | 17 52% | 13 57% | 53 40% | 14 50% | 31 53% | 35 46% | 37 48% | 20 48% | 22 45% |
| No impact | 195 46% | 114 41% | 81 54% | 88 46% | 107 45% | 53 58% | 38 40% | 36 45% | 67 42% | 27 52% | 58 40% | 102 48% | 112 44% | 14 42% | 8 35% | 68 51% | 13 46% | 24 41% | 37 49% | 34 44% | 18 43% | 21 43% |
| Negative impact | 33 8% | 22 8% | 11 7% | 16 8% | 17 7% | 5 5% | 6 6% | 6 8% | 16 10% | 4 8% | 9 6% | 18 8% | 18 7% | 2 6% | 2 9% | 13 10% | 1 4% | 3 5% | 4 5% | 6 8% | 4 10% | 6 12% |

Columns Tested: a-b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q13a. To what extent, if at all, do you feel able to respond to the evolving global sanctions environment? For example the reimposition of sanctions against Iran.

Base: All respondents

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|-------------------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 617 100% | 407 100% | 210 100% | 308 100% | 309 100% | 158 100% | 146 100% | 109 100% | 203 100% | 87 100% | 225 100% | 276 100% | 376 100% | 36 100% | 34 100% | 185 100% | 37 100% | 87 100% | 104 100% | 105 100% | 69 100% | 68 100% |
| Very able | 166 27% | 113 28% | 53 25% | 83 27% | 83 27% | 27 17% | 48 33% | 35 32% | 56 28% | 20 23% | 65 29% | 77 28% | 109 29% | 16 44% | 14 41% | 47 25% | 13 35% | 30 34% | 34 33% | 35 33% | 19 28% | 9 13% |
| Fairly able | 274 44% | 183 45% | 91 43% | 139 45% | 135 44% | 76 48% | 63 43% | 53 49% | 82 40% | 36 41% | 110 49% | 120 43% | 171 45% | 10 28% | 16 47% | 81 44% | 16 43% | 37 43% | 49 47% | 54 51% | 27 39% | 28 41% |
| Not very able | 73 12% | 43 11% | 30 14% | 33 11% | 40 13% | 17 11% | 13 9% | 13 12% | 30 15% | 9 10% | 20 9% | 41 15% | 37 10% | 9 25% | 2 6% | 28 15% | 5 14% | 11 13% | 14 13% | 6 6% | 10 14% | 9 13% |
| Not able at all | 29 5% | 21 5% | 8 4% | 14 5% | 15 5% | 11 7% | 6 4% | 1 1% | 11 5% | 5 6% | 10 4% | 12 4% | 17 5% | - - | - - | 8 4% | - - | 4 5% | 2 2% | 2 2% | 5 7% | 4 6% |
| Don't know | 75 12% | 47 12% | 28 13% | 39 13% | 36 12% | 27 17% | 16 11% | 7 6% | 24 12% | 17 20% | 20 9% | 26 9% | 42 11% | 1 3% | 2 6% | 21 11% | 3 8% | 5 6% | 5 5% | 8 8% | 8 12% | 18 26% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Able | 440 71% | 296 73% | 144 69% | 222 72% | 218 71% | 103 65% | 111 76% | 88 81% | 138 68% | 56 64% | 175 78% | 197 71% | 280 74% | 26 72% | 30 88% | 128 69% | 29 78% | 67 77% | 83 80% | 89 85% | 46 67% | 37 54% |
| Net: Not able | 102 17% | 64 16% | 38 18% | 47 15% | 55 18% | 28 18% | 19 13% | 14 13% | 41 20% | 14 16% | 30 13% | 53 19% | 54 14% | 9 25% | 2 6% | 36 19% | 5 14% | 15 17% | 16 15% | 8 8% | 15 22% | 13 19% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q13a. To what extent, if at all, do you feel able to respond to the evolving global sanctions environment? For example the reimposition of sanctions against Iran.

Base: All respondents (excluding don't know)

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|-------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 542 100% | 360 100% | 182 100% | 269 100% | 273 100% | 131 100% | 130 100% | 102 100% | 179 100% | 70 100% | 205 100% | 250 100% | 334 100% | 35 100% | 32 100% | 164 100% | 34 100% | 82 100% | 99 100% | 97 100% | 61 100% | 50 100% |
| Very able | 166 31% | 113 31% | 53 29% | 83 31% | 83 30% | 27 21% | 48 37% | 35 34% | 56 31% | 20 29% | 65 32% | 77 31% | 109 33% | 16 46% | 14 44% | 47 29% | 13 38% | 30 37% | 34 34% | 35 36% | 19 31% | 9 18% |
| Fairly able | 274 51% | 183 51% | 91 50% | 139 52% | 135 49% | 76 58% | 63 48% | 53 52% | 82 46% | 36 51% | 110 54% | 120 48% | 171 51% | 10 29% | 16 50% | 81 49% | 16 47% | 37 45% | 49 49% | 54 56% | 27 44% | 28 56% |
| Not very able | 73 13% | 43 12% | 30 16% | 33 12% | 40 15% | 17 13% | 13 10% | 13 13% | 30 17% | 9 13% | 20 10% | 41 16% | 37 11% | 9 26% | 2 6% | 28 17% | 5 15% | 11 13% | 14 14% | 6 6% | 10 16% | 9 18% |
| Not able at all | 29 5% | 21 6% | 8 4% | 14 5% | 15 5% | 11 8% | 6 5% | 1 1% | 11 6% | 5 7% | 10 5% | 12 5% | 17 5% | - | - | 8 5% | - | 4 5% | 2 2% | 2 2% | 5 8% | 4 8% |
| NETS | | | | | | | | | | | | | | | | | | | | | | |
| Net: Able | 440 81% | 296 82% | 144 79% | 222 83% | 218 80% | 103 79% | 111 85% | 88 86% | 138 77% | 56 80% | 175 85% | 197 79% | 280 84% | 26 74% | 30 94% | 128 78% | 29 85% | 67 82% | 83 84% | 89 92% | 46 75% | 37 74% |
| Net: Not able | 102 19% | 64 18% | 38 21% | 47 17% | 55 20% | 28 21% | 19 15% | 14 14% | 41 23% | 14 20% | 30 15% | 53 21% | 54 16% | 9 26% | 2 6% | 36 22% | 5 15% | 15 18% | 16 16% | 8 8% | 15 25% | 13 26% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to/ are not able to respond to changes to the evolving global sanctions environment. Please state why you are able to/ are not able to meet these changes.

Base: All respondents who are able/not able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 542 100% | 360 100% | 182 100% | 269 100% | 273 100% | 131 100% | 130 100% | 102 100% | 179 100% | 70 100% | 205 100% | 250 100% | 334 100% | 35 100% | 32 100% | 164 100% | 34 100% | 82 100% | 99 100% | 97 100% | 61 100% | 50 100% |
| Doesn't affect us/ No involvement/ Not much relevance for us as of now | 67 12% | 49 14% | 18 10% | 29 11% | 38 14% | 28 21% | 12 9% | 9 9% | 18 10% | 16 23% | 19 9% | 30 12% | 46 14% | 2 6% | - - | 20 12% | 3 9% | 4 5% | 6 6% | 8 8% | 10 16% | 7 14% |
| Have the capacity/power/ Am Very able/ Can do | 40 7% | 26 7% | 14 8% | 20 7% | 20 7% | 12 9% | 14 11% | 7 7% | 7 4% | 9 13% | 19 9% | 11 4% | 22 7% | 3 9% | 1 3% | 12 7% | 1 3% | 7 9% | 15 15% | 9 9% | 1 2% | 3 6% |
| Reliable and knowledgeable/skilled/trained staff/team | 39 7% | 23 6% | 16 9% | 20 7% | 19 7% | 5 4% | 10 8% | 7 7% | 17 9% | 4 6% | 13 6% | 21 8% | 22 7% | - - | 2 6% | 14 9% | 1 3% | 6 7% | 8 8% | 5 5% | 6 10% | 8 16% |
| Have access to information/ Well informed/ Up to date | 37 7% | 23 6% | 14 8% | 24 9% | 13 5% | 9 7% | 13 10% | 4 4% | 11 6% | 1 1% | 18 9% | 13 5% | 20 6% | 1 3% | 3 9% | 13 8% | 1 3% | 5 6% | 7 7% | 8 8% | 4 7% | 3 6% |
| Proper planning/ Well prepared/ Always ready/quick to respond | 32 6% | 25 7% | 7 4% | 23 9% | 9 3% | 4 3% | 10 8% | 8 8% | 10 6% | 1 1% | 13 6% | 16 6% | 21 6% | 3 9% | 4 13% | 7 4% | 1 3% | 9 11% | 4 4% | 10 10% | 2 3% | 1 2% |
| Very flexible/dynamic to respond/ Adapt very well | 24 4% | 16 4% | 8 4% | 12 4% | 12 4% | 5 4% | 5 4% | 4 4% | 10 6% | 2 3% | 8 4% | 13 5% | 14 4% | - - | - - | 7 4% | 2 6% | 3 4% | 5 5% | 3 3% | 4 7% | 4 8% |
| Do not do business with Iran or other dodgy countries | 24 4% | 15 4% | 9 5% | 12 4% | 12 4% | 8 6% | 5 4% | 3 3% | 8 4% | 4 6% | 8 4% | 12 5% | 11 3% | - - | - - | 9 5% | 2 6% | 7 9% | 3 3% | 7 7% | 3 5% | 2 4% |
| Have systems/checks set/in place to monitor global sanctions | 23 4% | 13 4% | 10 5% | 13 5% | 10 4% | 3 2% | 7 5% | 1 1% | 12 7% | 1 1% | 6 3% | 16 6% | 18 5% | 4 11% | 2 6% | 11 7% | 4 12% | 3 4% | 7 7% | 7 7% | 2 3% | - - |
| Fully compliant | 21 4% | 15 4% | 6 3% | 11 4% | 10 4% | 3 2% | 6 5% | 5 5% | 7 4% | - - | 10 5% | 10 4% | 18 5% | 1 3% | 2 6% | 8 5% | 4 12% | - - | 4 4% | 5 5% | 2 3% | 1 2% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to/ are not able to respond to changes to the evolving global sanctions environment. Please state why you are able to/ are not able to meet these changes.

Base: All respondents who are able/not able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|---|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | | | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 542 100% | 360 100% | 182 100% | 269 100% | 273 100% | 131 100% | 130 100% | 102 100% | 179 100% | 70 100% | 205 100% | 250 100% | 334 100% | 35 100% | 32 100% | 164 100% | 34 100% | 82 100% | 99 100% | 97 100% | 61 100% | 50 100% |
| Have necessary tools/resources/infrastructure | 20 4% | 12 3% | 8 4% | 12 4% | 8 3% | 2 2% | 3 2% | 5 5% | 10 6% | 1 1% | 5 2% | 13 5% | 12 4% | - - | - - | 7 4% | 1 3% | 3 4% | 4 4% | 2 2% | 3 5% | 3 6% |
| It is good/ It is beneficial/important for us/ Makes us feel empowered | 19 4% | 13 4% | 6 3% | 13 5% | 6 2% | 2 2% | 4 3% | 6 6% | 7 4% | 1 1% | 11 5% | 7 3% | 14 4% | 5 14% adf | 1 3% | 6 4% | 2 6% | 1 1% | 4 4% | 1 1% | 2 3% | 2 4% |
| Ours is a stable/growing company/business with everything in order | 19 4% | 14 4% | 5 3% | 10 4% | 9 3% | 3 2% | 7 5% | 2 2% | 7 4% | 2 3% | 4 2% | 11 4% | 11 3% | - - | 1 3% | 6 4% | 1 3% | 4 5% | 3 3% | 8 8% | 3 5% | 1 2% |
| We are a small business/local business | 16 3% | 15 4% | 1 1% | 9 3% | 7 3% | 7 5% | 5 4% | 1 1% | 3 2% | 4 6% | 4 2% | 7 3% | 13 4% | 1 3% | - - | 2 1% | - - | 1 1% | 3 3% | 2 2% | 2 3% | 1 2% |
| Have the latest technology/ We are high-tech | 15 3% | 9 3% | 6 3% | 9 3% | 6 2% | 4 3% | 5 4% | 3 3% | 3 2% | 1 1% | 9 4% | 5 2% | 8 2% | - - | 1 3% | 4 2% | - - | 4 5% | 2 2% | 6 6% | 2 3% | - - |
| Don't have enough knowledge/training/ Not well informed | 15 3% | 10 3% | 5 3% | 6 2% | 9 3% | 5 4% | 5 4% | 1 1% | 4 2% | 1 1% | 6 3% | 8 3% | 9 3% | 1 3% | - - | 4 2% | 1 3% | 2 2% | 1 1% | 2 2% | 2 3% | 1 2% |
| Supplier flexibility/ We have multiple suppliers/ Can switch suppliers | 14 3% | 12 3% | 2 1% | 4 1% | 10 4% | 5 4% | 2 2% | 4 4% | 3 2% | 3 4% | 4 2% | 6 2% | 11 3% | - - | - - | 2 1% | - - | 1 1% | 1 1% | 4 4% | 1 2% | - - |
| No import or export/overseas business/ No dealings with foreign governments | 13 2% | 8 2% | 5 3% | 7 3% | 6 2% | 7 5% | 3 2% | 2 2% | 1 1% | 5 7% | 4 2% | 4 2% | 8 2% | - - | - - | 4 2% | - - | - - | 1 1% | - - | 4 7% | 1 2% |
| Have always done it before/ Past experience | 12 2% | 6 2% | 6 3% | 6 2% | 6 2% | 2 2% | 3 2% | 4 4% | 3 2% | - - | 5 2% | 7 3% | 6 2% | - - | 1 3% | 2 1% | 1 3% | 5 6% | 3 3% | 2 2% | - - | - - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to/ are not able to respond to changes to the evolving global sanctions environment. Please state why you are able to/ are not able to meet these changes.

Base: All respondents who are able/not able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|-------------|-------------|-------------|---------------|---------------|-------------|-------------|-----------------|---------------------|--|----------------------|---------------------|--|----------------------------------|---------------------------|---------------------------------|--------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 542 100% | 360 100% | 182 100% | 269 100% | 273 100% | 131 100% | 130 100% | 102 100% | 179 100% | 70 100% | 205 100% | 250 100% | 334 100% | 35 100% | 32 100% | 164 100% | 34 100% | 82 100% | 99 100% | 97 100% | 61 100% | 50 100% |
| Costs are easy to meet/ Financially stable | 12 2% | 8 2% | 4 2% | 2 1% | 10 4% a | 2 2% | 4 3% | - - | 6 3% | 2 3% | 3 1% | 6 2% | 7 2% | 2 6% | 2 6% | 4 2% | 1 3% | 1 1% | - - | 2 2% | 2 3% | 3 6% a |
| Part/need of business/ Required/ Do what is needed/appropriate | 12 2% | 10 3% | 2 1% | 4 1% | 8 3% | 4 3% | 3 2% | 3 3% | 2 1% | 2 3% | 5 2% | 3 1% | 8 2% | 1 3% | 3 9% ad | 2 1% | 1 3% | 2 2% | 1 1% | 2 2% | 2 3% | 3 6% |
| We do appropriate research and development | 10 2% | 6 2% | 4 2% | 4 1% | 6 2% | 3 2% | 4 3% | 1 1% | 2 1% | 2 3% | 5 2% | 3 1% | 4 1% | - - | - - | 2 1% | 3 9% ad | 4 5% a | 3 3% | 2 2% | 1 2% | 1 2% |
| It is simple and easy | 9 2% | 7 2% | 2 1% | 3 1% | 6 2% | 2 2% | 1 1% | 2 2% | 4 2% | - - | 6 3% | 3 1% | 5 1% | 1 3% | - - | 1 1% | - - | 1 1% | 1 1% | 1 1% | 1 2% | - - |
| Good communication | 7 1% | 7 2% | - - | 5 2% | 2 1% | 1 1% | 1 1% | 3 3% | 2 1% | - - | 4 2% | 3 1% | 4 1% | - - | 1 3% d | - - | - - | 2 2% d | 1 1% | 1 1% | 1 2% | - - |
| Employ other workarounds/strategies | 7 1% | 3 1% | 4 2% | 3 1% | 4 1% | 2 2% | 1 1% | 2 2% | 2 1% | 1 1% | 2 1% | 4 2% | 5 1% | 1 3% | 3 9% ad | 3 2% | 2 6% ad | 2 3% | 1 1% | - - | - - | - - |
| Have effective policies | 6 1% | 3 1% | 3 2% | 3 1% | 3 1% | - - | 1 1% | 2 2% | 3 2% | - - | 2 1% | 4 2% | 4 1% | - - | 1 3% | 3 2% | 1 3% | - - | - - | 1 1% | 1 2% | 1 2% |
| Management/Leadership team supports | 6 1% | 5 1% | 1 1% | 4 1% | 2 1% | 2 2% | 1 1% | 1 1% | 2 1% | 1 1% | 1 1% | 3 1% | 6 2% | - - | 2 6% df | 1 1% | 2 6% df | - - | 2 2% | 1 1% | 1 2% | 1 2% |
| We are UK/US based only | 6 1% | 2 1% | 4 2% | 3 1% | 3 1% | 1 1% | 1 1% | 3 3% | 1 1% | - - | 3 1% | 3 1% | 2 1% | - - | - - | 3 2% | - - | - - | 1 1% | 1 1% | - - | 1 2% |
| It is okay/ Ok/ Not a problem | 5 1% | 5 1% | - - | 2 1% | 3 1% | 1 1% | 2 2% | 1 1% | 1 1% | 1 1% | 2 1% | 2 1% | 5 1% | - - | 1 3% d | - - | - - | - - | - - | 2 2% | - - | - - |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to/ are not able to respond to changes to the evolving global sanctions environment. Please state why you are able to/ are not able to meet these changes.

Base: All respondents who are able/not able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|-------------|--------------|-------------|--------------|---------------|-------------|--------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|---------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 542 100% | 360 100% | 182 100% | 269 100% | 273 100% | 131 100% | 130 100% | 102 100% | 179 100% | 70 100% | 205 100% | 250 100% | 334 100% | 35 100% | 32 100% | 164 100% | 34 100% | 82 100% | 99 100% | 97 100% | 61 100% | 50 100% |
| Too complicated/complex | 5 1% | 1 * | 4 2% a | 4 1% | 1 * | - - | - - | - - | 5 3% | - - | - - | 5 2% b | - - | - - | - - | 1 1% | - - | 4 5% ad | 1 1% | - - | - - | 1 2% |
| Costly/ Expensive/ Need more funds | 5 1% | 3 1% | 2 1% | 2 1% | 3 1% | 1 1% | 1 1% | - - | 3 2% | - - | 2 1% | 3 1% | 4 1% | - - | 2 6% ad | - - | - - | 1 1% | 3 3% | - - | - - | - - |
| Not good for our business/ Limits our market | 5 1% | 2 1% | 3 2% | 2 1% | 3 1% | 1 1% | 1 1% | - - | 3 2% | - - | 2 1% | 3 1% | 3 1% | 2 6% af | - - | 2 1% | - - | - - | 1 1% | 1 1% | 1 2% | - - |
| My viewpoint/ How I feel | 5 1% | 5 1% | - - | 4 1% | 1 * | 1 1% | 2 2% | 2 2% | - - | 1 1% | 2 1% | 2 1% | 2 1% | - - | - - | - - | - - | 2 2% d | 1 1% | 2 2% | - - | - - |
| We are excellent service provider | 4 1% | 4 1% | - - | 1 * | 3 1% | - - | 3 2% | - - | 1 1% | - - | 1 * | 3 1% | 4 1% | - - | - - | - - | - - | - - | - - | 1 1% | - - | - - |
| Don't have enough power | 4 1% | 2 1% | 2 1% | - - | 4 1% a | - - | - - | 3 3% a | 1 1% | - - | 2 1% | 2 1% | 2 1% | 1 3% | - - | 3 2% | - - | - - | - - | - - | - - | 2 3% |
| Changes happen too fast/too many to keep up with them/ Unable to catch up with changes | 4 1% | 4 1% | - - | 3 1% | 1 * | 1 1% | 1 1% | 1 1% | 1 1% | - - | 3 1% | 1 * | 4 1% | 1 3% | - - | 1 1% | 1 3% | - - | 1 1% | - - | - - | - - |
| Lack of necessary resources/team | 4 1% | 3 1% | 1 1% | - - | 4 1% a | 1 1% | 1 1% | - - | 2 1% | 1 1% | 1 * | 2 1% | 3 1% | - - | - - | 1 1% | - - | - - | 1 1% | 2 2% | - - | - - |
| Other limitations | 4 1% | 4 1% | - - | 2 1% | 2 1% | - - | - - | 1 1% | 3 2% | - - | - - | 4 2% | 1 * | - - | - - | - - | - - | 3 4% ad | 1 1% | 1 1% | - - | 1 2% |
| Legal barriers/ Government barriers/regulations | 4 1% | 2 1% | 2 1% | 3 1% | 1 * | - - | 2 2% | - - | 2 1% | 1 1% | 1 * | 2 1% | 3 1% | - - | - - | 2 1% | - - | - - | 1 1% | 1 1% | - - | 1 2% |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to/ are not able to respond to changes to the evolving global sanctions environment. Please state why you are able to/ are not able to meet these changes.

Base: All respondents who are able/not able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--------------------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|--------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 542 100% | 360 100% | 182 100% | 269 100% | 273 100% | 131 100% | 130 100% | 102 100% | 179 100% | 70 100% | 205 100% | 250 100% | 334 100% | 35 100% | 32 100% | 164 100% | 34 100% | 82 100% | 99 100% | 97 100% | 61 100% | 50 100% |
| No opinion/comment/ None | 8 1% | 3 1% | 5 3% | 3 1% | 5 2% | 3 2% | 2 2% | 2 2% | 1 1% | 1 1% | 4 2% | 3 1% | 3 1% | 1 3% | 1 3% | 5 3% | - - | 1 1% | 2 2% | 3 3% | 2 3% | - - |
| Other | 47 9% | 33 9% | 14 8% | 24 9% | 23 8% | 10 8% | 8 6% | 10 10% | 19 11% | 6 9% | 21 10% | 20 8% | 30 9% | 4 11% | 4 13% | 12 7% | 2 6% | 8 10% | 9 9% | 8 8% | 5 8% | 10 20% b |
| Don't know/ Unsure | 21 4% | 11 3% | 10 5% | 11 4% | 10 4% | 4 3% b | - - | 7 7% b | 10 6% b | 3 4% | 5 2% | 12 5% | 10 3% | 2 6% | 2 6% | 10 6% | 4 12% a | 3 4% | 4 4% | 3 5% | - - | |
| Not applicable | 15 3% | 8 2% | 7 4% | 5 2% | 10 4% | 3 2% | 5 4% | 2 2% | 5 3% | 3 4% | 6 3% | 5 2% | 6 2% | 1 3% | - - | 6 4% | - - | 2 2% | 3 3% | 1 1% | 2 3% | - - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d



Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to respond to changes to the evolving global sanctions environment. Please state why you are able to meet these changes.

Base: All respondents who are able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|-------------|-------------|-------------|-------------|---------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 440 100% | 296 100% | 144 100% | 222 100% | 218 100% | 103 100% | 111 100% | 88 100% | 138 100% | 56 100% | 175 100% | 197 100% | 280 100% | 26 100% | 30 100% | 128 100% | 29 100% | 67 100% | 83 100% | 89 100% | 46 100% | 37 100% |
| Doesn't affect us/ No involvement/ Not much relevance for us as of now | 45 10% | 32 11% | 13 9% | 19 9% | 26 12% | 20 19% | 8 7% | 8 9% | 9 7% | 14 25% | 14 8% | 17 9% | 30 11% | 1 4% | - - | 14 11% | 2 7% | 3 4% | 4 5% | 5 6% | 5 11% | 4 11% |
| Reliable and knowledgeable/skilled/trained staff/team | 39 9% | 23 8% | 16 11% | 20 9% | 19 9% | 5 5% | 10 9% | 7 8% | 17 12% | 4 7% | 13 7% | 21 11% | 22 8% | - - | 2 7% | 14 11% | 1 3% | 6 9% | 8 10% | 5 6% | 6 13% | 8 22% |
| Have the capacity/power/ Am Very able/ Can do | 38 9% | 24 8% | 14 10% | 20 9% | 18 8% | 12 12% | 14 13% | 6 7% | 6 4% | 8 14% | 19 11% | 10 5% | 20 7% | 3 12% | 1 3% | 11 9% | - - | 7 10% | 14 17% | 8 9% | 1 2% | 3 8% |
| Have access to information/ Well informed/ Up to date | 37 8% | 23 8% | 14 10% | 24 11% | 13 6% | 9 9% | 13 12% | 4 5% | 11 8% | 1 2% | 18 10% | 13 7% | 20 7% | 1 4% | 3 10% | 13 10% | 1 3% | 5 7% | 7 8% | 8 9% | 4 9% | 3 8% |
| Proper planning/ Well prepared/ Always ready/quick to respond | 32 7% | 25 8% | 7 5% | 23 10% | 9 4% | 4 4% | 10 9% | 8 9% | 10 7% | 1 2% | 13 7% | 16 8% | 21 8% | 3 12% | 4 13% | 7 5% | 1 3% | 9 13% | 4 5% | 10 11% | 2 4% | 1 3% |
| Very flexible/dynamic to respond/ Adapt very well | 24 5% | 16 5% | 8 6% | 12 5% | 12 6% | 5 5% | 5 5% | 4 5% | 10 7% | 2 4% | 8 5% | 13 7% | 14 5% | - - | - - | 7 5% | 2 7% | 3 4% | 5 6% | 3 3% | 4 9% | 4 11% |
| Have systems/checks set/in place to monitor global sanctions | 23 5% | 13 4% | 10 7% | 13 6% | 10 5% | 3 3% | 7 6% | 1 1% | 12 9% | 1 2% | 6 3% | 16 8% | 18 6% | 4 15% | 2 7% | 11 9% | 4 14% | 3 4% | 7 8% | 7 8% | 2 4% | - - |
| Fully compliant | 21 5% | 15 5% | 6 4% | 11 5% | 10 5% | 3 3% | 6 5% | 5 6% | 7 5% | - - | 10 6% | 10 5% | 18 6% | 1 4% | 2 7% | 8 6% | 4 14% | - - | 4 5% | 5 6% | 2 4% | 1 3% |
| Have necessary tools/resources/infrastructure | 20 5% | 12 4% | 8 6% | 12 5% | 8 4% | 2 2% | 3 3% | 5 6% | 10 7% | 1 2% | 5 3% | 13 7% | 12 4% | - - | - - | 7 5% | 1 3% | 3 4% | 4 5% | 2 2% | 3 7% | 3 8% |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to respond to changes to the evolving global sanctions environment. Please state why you are able to meet these changes.

Base: All respondents who are able to respond to the evolving global sanctions environment

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|-------------|-------------|-------------|-------------|---------------|-------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 440 100% | 296 100% | 144 100% | 222 100% | 218 100% | 103 100% | 111 100% | 88 100% | 138 100% | 56 100% | 175 100% | 197 100% | 280 100% | 26 100% | 30 100% | 128 100% | 29 100% | 67 100% | 83 100% | 89 100% | 46 100% | 37 100% |
| Do not do business with Iran or other dodgy countries | 19 4% | 11 4% | 8 6% | 9 4% | 10 5% | 8 8% | 4 4% | 2 2% | 5 4% | 4 7% | 5 3% | 10 5% | 9 3% | - - | - - | 7 5% | 1 3% | 5 7% | 3 4% | 6 7% | 3 7% | 1 3% |
| Ours is a stable/growing company/business with everything in order | 19 4% | 14 5% | 5 3% | 10 5% | 9 4% | 3 3% | 7 6% | 2 2% | 7 5% | 2 4% | 4 2% | 11 6% | 11 4% | - - | 1 3% | 6 5% | 1 3% | 4 6% | 3 4% | 8 9% | 3 7% | 1 3% |
| It is good/ It is beneficial/important for us/ Makes us feel empowered | 18 4% | 13 4% | 5 3% | 12 5% | 6 3% | 2 2% | 4 4% | 5 6% | 7 5% | 1 2% | 11 6% | 6 3% | 13 5% | 4 15% | 1 3% | 6 5% | 2 7% | 1 1% | 4 5% | 1 1% | 2 4% | 2 5% |
| Have the latest technology/ We are high-tech | 15 3% | 9 3% | 6 4% | 9 4% | 6 3% | 4 4% | 5 5% | 3 3% | 3 2% | 1 2% | 9 5% | 5 3% | 8 3% | - - | 1 3% | 4 3% | - - | 4 6% | 2 2% | 6 7% | 2 4% | - - |
| Supplier flexibility/ We have multiple suppliers/ Can switch suppliers | 12 3% | 11 4% | 1 1% | 3 1% | 9 4% | 5 5% | 2 2% | 3 3% | 2 1% | 3 5% | 4 2% | 4 2% | 10 4% | - - | - - | 1 1% | - - | 1 1% | 1 1% | 4 4% | 1 2% | - - |
| Have always done it before/ Past experience | 12 3% | 6 2% | 6 4% | 6 3% | 6 3% | 2 2% | 3 3% | 4 5% | 3 2% | - - | 5 3% | 7 4% | 6 2% | - - | 1 3% | 2 2% | 1 3% | 5 7% | 3 4% | 2 2% | - - | - - |
| Part/need of business/ Required/ Do what is needed/appropriate | 12 3% | 10 3% | 2 1% | 4 2% | 8 4% | 4 4% | 3 3% | 3 3% | 2 1% | 2 4% | 5 3% | 3 2% | 8 3% | 1 4% | 3 10% | 2 2% | 1 3% | 2 3% | 1 1% | 2 2% | 2 4% | 3 8% |
| Costs are easy to meet/ Financially stable | 10 2% | 8 3% | 2 1% | 2 1% | 8 4% | 2 2% | 4 4% | - - | 4 3% | 2 4% | 3 2% | 5 3% | 7 3% | 2 8% | 2 7% | 2 2% | 1 3% | 1 1% | - - | 2 2% | 2 4% | 1 3% |
| We do appropriate research and development | 10 2% | 6 2% | 4 3% | 4 2% | 6 3% | 3 3% | 4 4% | 1 1% | 2 1% | 2 4% | 5 3% | 3 2% | 4 1% | - - | - - | 2 2% | 3 10% | 4 6% | 3 4% | 2 2% | 1 2% | 1 3% |

Columns Tested: a - b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to respond to changes to the evolving global sanctions environment. Please state why you are able to meet these changes.

Base: All respondents who are able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|---|-------------|-------------|-------------|-------------|-------------|---------------|-------------|------------|-----------------|---------------------|--|----------------------|---------------------|-------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa/ (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 440 100% | 296 100% | 144 100% | 222 100% | 218 100% | 103 100% | 111 100% | 88 100% | 138 100% | 56 100% | 175 100% | 197 100% | 280 100% | 26 100% | 30 100% | 128 100% | 29 100% | 67 100% | 83 100% | 89 100% | 46 100% | 37 100% |
| We are a small business/local business | 10 2% | 9 3% | 1 1% | 5 2% | 5 2% | 5 5% | 2 2% | 1 1% | 2 1% | 2 4% | 4 2% | 3 2% | 9 3% | - | - | 2 2% | - | - | 1 1% | 2 2% | 1 2% | 1 3% |
| It is simple and easy | 9 2% | 7 2% | 2 1% | 3 1% | 6 3% | 2 2% | 1 1% | 2 2% | 4 3% | - | 6 3% | 3 2% | 5 2% | 1 4% | - | 1 1% | - | 1 1% | 1 1% | 1 1% | - | - |
| No import or export/overseas business/ No dealings with foreign governments | 8 2% | 5 2% | 3 2% | 4 2% | 4 2% | 4 4% | 1 1% | 2 2% | 1 1% | 3 5% | 2 1% | 3 2% | 5 2% | - | - | 2 2% | - | - | - | - | 3 7% | 1 3% |
| Good communication | 7 2% | 7 2% | - | 5 2% | 2 1% | 1 1% | 1 1% | 3 3% | 2 1% | - | 4 2% | 3 2% | 4 1% | - | 1 3% | - | - | 2 3% | 1 1% | 1 1% | 1 2% | - |
| Employ other workarounds/strategies | 7 2% | 3 1% | 4 3% | 3 1% | 4 2% | 2 2% | 1 1% | 2 2% | 2 1% | 1 2% | 2 1% | 4 2% | 5 2% | 1 4% | 3 10% | 3 2% | 2 7% | 2 3% | 3 4% | 1 1% | - | - |
| Have effective policies | 6 1% | 3 1% | 3 2% | 3 1% | 3 1% | - | 1 1% | 2 2% | 3 2% | - | 2 1% | 4 2% | 4 1% | - | 1 3% | 3 2% | 1 3% | - | - | 1 1% | 1 2% | 1 3% |
| Management/Leadership team supports | 6 1% | 5 2% | 1 1% | 4 2% | 2 1% | 2 2% | 1 1% | 1 1% | 2 1% | 1 2% | 1 1% | 3 2% | 6 2% | - | 2 7% | 1 1% | 2 7% | - | 2 2% | 1 1% | 1 2% | 1 3% |
| We are UK/US based only | 6 1% | 2 1% | 4 3% | 3 1% | 3 1% | 1 1% | 1 1% | 3 3% | 1 1% | - | 3 2% | 3 2% | 2 1% | - | - | 3 2% | - | - | 1 1% | 1 1% | - | 1 3% |
| It is okay/ Ok/ Not a problem | 5 1% | 5 2% | - | 2 1% | 3 1% | 1 1% | 2 2% | 1 1% | 1 1% | 1 2% | 2 1% | 2 1% | 5 2% | - | 1 3% | - | - | - | - | 2 2% | - | - |
| We are excellent service provider | 4 1% | 4 1% | - | 1 * | 3 1% | - | 3 3% | - | 1 1% | - | 1 1% | 3 2% | 4 1% | - | - | - | - | - | - | 1 1% | - | - |
| My viewpoint/ How I feel | 3 1% | 3 1% | - | 3 1% | - | 1 1% | 1 1% | 1 1% | - | 1 2% | 2 1% | - | 1 * | - | - | - | - | 1 1% | 1 1% | 1 1% | - | - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d



Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are able to respond to changes to the evolving global sanctions environment. Please state why you are able to meet these changes.

Base: All respondents who are able to respond to the evolving global sanctions environment

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|-------------|-------------|-------------|-------------|---------------|-------------|-------------|---------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|--------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | a | b | c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 440 100% | 296 100% | 144 100% | 222 100% | 218 100% | 103 100% | 111 100% | 88 100% | 138 100% | 56 100% | 175 100% | 197 100% | 280 100% | 26 100% | 30 100% | 128 100% | 29 100% | 67 100% | 83 100% | 89 100% | 46 100% | 37 100% |
| Lack of necessary resources/team | 2 * | 2 1% | - | - | 2 1% | - | 1 1% | - | 1 1% | - | 1 1% | 1 1% | 2 1% | - | - | - | - | - | - | 1 1% | - | - |
| Legal barriers/ Government barriers/regulations | 2 * | 1 * | 1 1% | 2 1% | - | - | 1 1% | - | 1 1% | - | 1 1% | 1 1% | 2 1% | - | - | 1 1% | - | - | 1 1% | 1 1% | - | - |
| Don't have enough knowledge/training/ Not well informed | 1 * | - | 1 1% | - | 1 * | 1 1% | - | - | - | - | 1 1% | - | - | - | - | 1 1% | - | - | - | - | - | - |
| Costly/ Expensive/ Need more funds | 1 * | 1 * | - | 1 * | - | - | 1 1% | - | - | - | 1 1% | - | 1 * | - | 1 3% d | - | - | - | - | - | - | - |
| Not good for our business/ Limits our market | 1 * | - | 1 1% | 1 * | - | - | - | - | 1 1% | - | - | 1 1% | 1 * | - | - | 1 1% | - | - | - | 1 1% | - | - |
| Changes happen too fast/too many to keep up with them/ Unable to catch up with changes | 1 * | 1 * | - | 1 * | - | - | - | - | 1 1% | - | - | 1 1% | 1 * | - | - | - | 1 3% | - | - | - | - | - |
| Other limitations | 1 * | 1 * | - | 1 * | - | - | - | - | 1 1% | - | - | 1 1% | - | - | - | - | - | 1 1% a | - | 1 1% | - | - |
| No opinion/comment/ None | 5 1% | 3 1% | 2 1% | 1 * | 4 2% | 1 1% | 2 2% | 2 2% | - | - | 3 2% | 2 1% | 3 1% | 1 4% | 1 3% | 2 2% | - | 1 1% | 2 2% | 1 2% | - | - |
| Other | 37 8% | 28 9% | 9 6% | 18 8% | 19 9% | 5 5% | 8 7% | 7 8% | 17 12% a | 4 7% | 15 9% | 18 9% | 26 9% | 4 15% | 4 13% | 8 6% | 2 7% | 6 9% | 7 8% | 7 8% | 4 9% | 7 19% |
| Don't know/ Unsure | 9 2% | 6 2% | 3 2% | 5 2% | 4 2% | - | - | 6 7% ab | 3 2% | - | 4 2% | 5 3% | 6 2% | 1 4% | 1 3% | 4 3% | 2 7% | - | 1 1% | 4 4% | 1 2% | - |
| Not applicable | 11 3% | 5 2% | 6 4% | 4 2% | 7 3% | 3 3% | 3 3% | 2 2% | 3 2% | 3 5% | 4 2% | 4 2% | 4 1% | 1 4% | - | 4 3% | - | 2 3% | 2 2% | 1 1% | 2 4% | - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are not able to respond to changes to the evolving global sanctions environment. Please state why you are not able to meet these changes.

Base: All respondents who are not able to respond to the evolving global sanctions environment

| | LOCATION | | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | |
|--|-------------|------------|------------|------------|-------------|---------------|------------|------------|-----------------|---------------------|--|----------------------|---------------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | *b | *c | d | a | b | c | a | b | c | d | e | f | a | b | c | d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 102 100% | 64 100% | 38 100% | 47 100% | 55 100% | 28 100% | 19 100% | 14 100% | 41 100% | 14 100% | 30 100% | 53 100% | 54 100% | 9 100% | 2 100% | 36 100% | 5 100% | 15 100% | 16 100% | 8 100% | 15 100% | 13 100% |
| Doesn't affect us/ No involvement/ Not much relevance for us as of now | 22 22% | 17 27% | 5 13% | 10 21% | 12 22% | 8 29% | 4 21% | 1 7% | 9 22% | 2 14% | 5 17% | 13 25% | 16 30% | 1 11% | - - | 6 17% | 1 20% | 1 7% | 2 13% | 3 38% | 5 33% | 3 23% |
| Don't have enough knowledge/training/ Not well informed | 14 14% | 10 16% | 4 11% | 6 13% | 8 15% | 4 14% | 5 26% | 1 7% | 4 10% | 1 7% | 5 17% | 8 15% | 9 17% | 1 11% | - - | 3 8% | 1 20% | 2 13% | 1 6% | 2 25% | 2 13% | 1 8% |
| We are a small business/local business | 6 6% | 6 9% | - - | 4 9% | 2 4% | 2 7% | 3 16% | - - | 1 2% | 2 14% | - - | 4 8% | 4 7% | 1 11% | - - | - - | - - | 1 7% | 2 13% | - - | 1 7% | - - |
| Do not do business with Iran or other dodgy countries | 5 5% | 4 6% | 1 3% | 3 6% | 2 4% | - - | 1 5% | 1 7% | 3 7% | - - | 3 10% | 2 4% | 2 4% | - - | - - | 2 6% | 1 20% | 2 13% | - - | 1 13% | - - | 1 8% |
| No import or export/overseas business/ No dealings with foreign governments | 5 5% | 3 5% | 2 5% | 3 6% | 2 4% | 3 11% | 2 11% | - - | - - | 2 14% | 2 7% | 1 2% | 3 6% | - - | - - | 2 6% | - - | - - | 1 6% | - - | 1 7% | - - |
| Too complicated/complex | 5 5% | 1 2% | 4 11% | 4 9% | 1 2% | - - | - - | - - | 5 12% | - - | - - | 5 9% | - - | - - | - - | 1 3% | - - | 4 27% | 1 6% | - - | - - | 1 8% |
| Don't have enough power | 4 4% | 2 3% | 2 5% | - - | 4 7% | - - | - - | 3 21% | 1 2% | - - | 2 7% | 2 4% | 2 4% | 1 11% | - - | 3 8% | - - | - - | - - | - - | 2 13% | - - |
| Costly/ Expensive/ Need more funds | 4 4% | 2 3% | 2 5% | 1 2% | 3 5% | 1 4% | - - | - - | 3 7% | - - | 1 3% | 3 6% | 3 6% | - - | 1 50% | - - | 1 7% | 3 19% | - - | - - | - - | - - |
| Not good for our business/ Limits our market | 4 4% | 2 3% | 2 5% | 1 2% | 3 5% | 1 4% | 1 5% | - - | 2 5% | - - | 2 7% | 2 4% | 2 4% | 2 22% | - - | 1 3% | - - | - - | 1 6% | - - | 1 7% | - - |
| Changes happen too fast/too many to keep up with them/ Unable to catch up with changes | 3 3% | 3 5% | - - | 2 4% | 1 2% | 1 4% | 1 5% | 1 7% | - - | - - | 3 10% | - - | 3 6% | 1 11% | - - | 1 3% | - - | - - | 1 6% | - - | - - | - - |

Columns Tested: a,b - a,b - a,b,c,d - a,b,c - a,b,c,d,e,f - a,b,c,d

Compliance and Procurement Sentiment - Wave 2

Q13b. You indicated that you are not able to respond to changes to the evolving global sanctions environment. Please state why you are not able to meet these changes.

Base: All respondents who are not able to respond to the evolving global sanctions environment

| | LOCATION | | FUNCTION | | BUSINESS SIZE | | | | ANNUAL TURNOVER | | | LOCATIONS SUPPORTED | | | | | | SECTOR | | | | |
|--|-------------|------------|------------|------------|---------------|------------|------------|------------|-----------------|---------------------|--|----------------------|---------------|------------------------------------|----------------------------------|---------------------------|---------------------------------|------------|--------------------|---------------|------------|---------------------|
| | Total | USA | UK | Compliance | Procurement | 1-50 | 51-250 | 251-1,000 | More than 1,000 | Under £/\$1 million | Between £/\$1 million and £/\$10 million | Above £/\$10 million | North America | Middle East & Africa (Sub Saharan) | Latin America (including Mexico) | Europe (including Turkey) | Asia-Pacific (including Russia) | Global | Financial Services | Manufacturing | Retail | Government agencies |
| | a | b | a | b | *a | *b | *c | d | *a | b | c | a | *b | *c | d | *e | f | *a | *b | *c | *d | |
| Significance Level: 95% | | | | | | | | | | | | | | | | | | | | | | |
| Total | 102 100% | 64 100% | 38 100% | 47 100% | 55 100% | 28 100% | 19 100% | 14 100% | 41 100% | 14 100% | 30 100% | 53 100% | 54 100% | 9 100% | 2 100% | 36 100% | 5 100% | 15 100% | 16 100% | 8 100% | 15 100% | 13 100% |
| Other limitations | 3 3% | 3 5% | - | 1 2% | 2 4% | - | - | 1 7% | 2 5% | - | - | 3 6% | 1 2% | - | - | - | 2 13% | 1 6% | - | - | - | 1 8% |
| Have the capacity/power/ Am Very able/ Can do | 2 2% | 2 3% | - | - | 2 4% | - | - | 1 7% | 1 2% | 1 7% | - | 1 2% | 2 4% | - | - | 1 3% | 1 20% | - | 1 6% | 1 13% | - | - |
| Supplier flexibility/ We have multiple suppliers/ Can switch suppliers | 2 2% | 1 2% | 1 3% | 1 2% | 1 2% | - | - | 1 7% | 1 2% | - | - | 2 4% | 1 2% | - | - | 1 3% | - | - | - | - | - | - |
| Costs are easy to meet/ Financially stable | 2 2% | - | 2 5% | - | 2 4% | - | - | - | 2 5% | - | - | 1 2% | - | - | - | 2 6% | - | - | - | - | - | 2 15% |
| My viewpoint/ How I feel | 2 2% | 2 3% | - | 1 2% | 1 2% | - | 1 5% | 1 7% | - | - | - | 2 4% | 1 2% | - | - | - | - | 1 7% | - | 1 13% | - | - |
| Lack of necessary resources/team | 2 2% | 1 2% | 1 3% | - | 2 4% | 1 4% | - | - | 1 2% | 1 7% | - | 1 2% | 1 2% | - | - | 1 3% | - | 1 6% | 1 13% | - | - | - |
| Legal barriers/ Government barriers/regulations | 2 2% | 1 2% | 1 3% | 1 2% | 1 2% | - | 1 5% | - | 1 2% | 1 7% | - | 1 2% | 1 2% | - | - | 1 3% | - | - | - | - | - | 1 8% |
| It is good/ It is beneficial/important for us/ Makes us feel empowered | 1 1% | - | 1 3% | 1 2% | - | - | - | 1 7% | - | - | - | 1 2% | 1 2% | 1 11% | - | - | - | - | - | - | - | - |
| No opinion/comment/ None | 3 3% | - | 3 8% | 2 4% | 1 2% | 2 7% | - | - | 1 2% | 1 7% | 1 3% | 1 2% | - | - | - | 3 8% | - | 1 6% | 1 13% | 1 7% | - | - |
| Other | 10 10% | 5 8% | 5 13% | 6 13% | 4 7% | 5 18% | - | 3 21% | 2 5% | 2 14% | 6 20% | 2 4% | 4 7% | - | - | 4 11% | - | 2 13% | 1 13% | 1 7% | 3 23% | |
| Don't know/ Unsure | 12 12% | 5 8% | 7 18% | 6 13% | 6 11% | 4 14% | - | 1 7% | 7 17% | 3 21% | 1 3% | 7 13% | 4 7% | 1 11% | 1 50% | 6 17% | 2 40% | 3 20% | 2 13% | - | 2 13% | - |
| Not applicable | 4 4% | 3 5% | 1 3% | 1 2% | 3 5% | - | 2 11% | - | 2 5% | - | 2 7% | 1 2% | 2 4% | - | - | 2 6% | - | 1 6% | - | - | - | - |

Columns Tested: a, b - a, b - a, b, c, d - a, b, c - a, b, c, d, e, f - a, b, c, d

