Department for International Trade

Analysis

Profile and exporting characteristics of DIT supported large businesses

Descriptive analysis of the 'Export Client Survey' Conducted April 2018 – March 2020

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This is a report of research carried out by Kantar Public, on behalf of the Department for International Trade.

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Contents

1 Introduction

Background and aims of research

The Department for International Trade (DIT) has a responsibility for promoting exports, both in terms of driving demand from overseas and encouraging UK businesses to export. In 2018 DIT launched its Export Strategy, this aims to tackle practical barriers preventing businesses from reaching their full export potential by adopting a business-led approach. This comprises of two parts which are:

- **a proportional approach to delivering export promotion services** by targeting exporters that confer the largest benefit to the UK economy
- **a segmentation of the UK business population to tailor support to their needs.** The segmentation is attitudinally based (based on export journey, attitudes, needs) and provides a way to understand the distribution of these attitudinal segments within a sector, region or product and a way to direct businesses towards particular products or services which best address their needs

Based on sophisticated statistical analysis the segmentation approach goes hand in hand with the proportional approach. This allows the department to continue to support all business sizes whilst addressing businesses' individual needs.

DIT has identified an important target population to focus on; High Export Potential businesses (HEPs). HEPs are defined as businesses having a turnover of more than £500,000 per annum and a product or service suitable for export. The department continues to support businesses of all sizes but the £500,000 threshold ensures the more intensive support is targeted to those who have the capacity to export and are able to secure large contracts. We know that large businesses, defined as having 250+ employees are considered to have greater capacity to secure large contracts and drive export growth owing to their size, resources and capabilities they possess for exporting. Capabilities can include the capability to assess the cost of exporting or to develop an export business plan.

This report presents descriptive analysis of the Quality Survey of DIT's 'Export Client Survey' (ECS). The report aims to provide an overview of the businesses that accessed export promotion services from DIT in 2018 to 2019 and 2019 to 2020. The report explores how these businesses compare with the wider population of UK-based exporters and UK registered businesses as a whole.

The Quality Survey is a telephone survey with businesses and explores the perceived quality of the advice and support, and businesses' satisfaction with the service accessed by product or service. The findings in this report are based on interviewing businesses who used DIT services between April 2018 and March 2020.

The client survey tracks the quality and reported impact of DIT export promotion services through monthly surveys. It includes details of business that accessed export promotion services and their characteristics and exporting behaviours, covering:

- firm level characteristics
- barriers to exporting
- type of DIT export promotion services used and frequency

To date, the survey has interviewed users of:

- the Tradeshow Access Programme (TAP)
- international trade advisers (ITAs)

- missions
- Overseas Business Network Initiative (OBNI)
- Overseas Market Introduction Service (OMIS)
- posts
- sector teams
- webinars
- export opportunities
- business profiles (previously called Find a Buyer)

The sample is designed to be representative of businesses accessing these export promotion services.

Approach to the analysis

This report includes analysis from the ‘Export Client Survey’ (ECS), based on merged data from 2 years of the survey (2018 to 2019 and 2019 to 2020). This has been done to increase the total sample size for the analysis. Prior to analysis, a merged dataset was created and businesses that participated in both years of the survey were de-duplicated. Where a business appeared in the combined dataset more than once, the most recently completed interview was kept. Data were re-weighted to be representative of the 2-year period. In total, the analysis covers 9,868 businesses that used DIT export promotion services between April 2018 and March 2020. For further detail, please see Appendix A.

This report also includes analysis by whether businesses were High Export Potential (HEP). These are businesses with a turnover of £500,000+ who have products or services suitable for export. All businesses who accessed export support and are surveyed in the ECS are deemed to have products or services suitable for export.

An initial scoping exercise identified sources of published statistics that were comparable with the ECS data, covering business characteristics and exporting behaviour. As far as possible, data have been selected for an equivalent timeframe to the ECS data (that is, between April 2018 to March 2020). The sources used in the report are summarised below, with further details included in the Technical Appendix.

Summary of comparable data sources

The following data sources have been used in the report to provide comparisons with businesses that have accessed certain DIT export promotion services. It is important to consider the scope and coverage of these datasets when reading the report. For example, as noted in Table 1.1 below, the ‘ONS Annual Business Survey (ABS) exporters and importers’ dataset provides robust population estimates for exporters but excludes Northern Ireland and certain industry sectors.

Table 1.1 comparable data sources used

Data source	Sample size and Population covered	Time period	Topic coverage
Export Client Survey (ECS) – Quality Survey	9,868 interviews with a sample of UK businesses that accessed exporting support from DIT.	April 2018-March 2020	The survey provides information on the perceived quality of the advice and support received, and satisfaction with the service

Data source	Sample size and Population covered	Time period	Topic coverage
			accessed by product or service. One limitation of using the ECS sample is that businesses may have used other DIT services not captured in the ECS; survey questions and analysis of the survey data focus on a single specific interaction with DIT. We are not able to fully control what wider experiences the businesses may draw on when responding.
Export Client Survey (ECS) – Pipeline data	Data from 9,868 business that were interviewed as part of the ECS Quality Survey.	April 2018-March 2020	Data on the number of different interactions with DIT and the number of different service deliveries used.
DIT National Survey of UK Registered Businesses (NSRB)[1, 2]	3,000 interviews with a sample of registered businesses in the UK	Wave 3 fieldwork: July 2017-September 2017 Wave 4 fieldwork: October 2018-January 2019	The survey provides information on the characteristics of registered businesses in the UK and their export behaviour, barriers and needs. The NSRB is designed to focus on businesses with an annual turnover exceeding £500,000, these businesses were oversampled relative to their true proportions in the population of businesses. Weighting of the data corrects for these deliberate skews.
ONS Annual Business Survey (ABS) exporters and importers[3]	Population estimates for registered businesses in GB (excluding Northern Ireland); excludes businesses in the insurance and reinsurance industries (SIC K - 65.1 and 65.2) and the majority of the agriculture sector. ABS identifies ‘current exporters’ (whereas the three surveys described	2018 (latest available)	The dataset provides details on current exporters, including analysis of size, turnover, age and UK region.

[1] DIT, 2017, ‘National Survey of Registered Businesses’ exporting behaviours, attitudes and needs’
[2] DIT, 2018, ‘National Survey of Registered Businesses’ exporting behaviours, attitudes and needs’
[3] ONS, 2018 ‘Annual Business Survey exporters and importers’

Data source	Sample size and Population covered	Time period	Topic coverage
	above identify businesses that have exported in the previous 12 months).		
ONS UK Business: Activity, Size and Location data[4,5]	Population estimates for registered businesses in UK.	2019, annual snapshot taken in March.	Business population data on size, sector (SIC) and region
HMRC UK Regional Trade in Goods Statistics[6]	Population estimates for UK-based exporters and importers	Annual figures for 2019	Data shows number of exporters, broken down by UK region in which they are based. Figures are shown in GBP.
Longitudinal Small Business Survey (LSBS)[7]	Annual survey of small and medium-sized enterprises (SMEs) in the UK. Analysis is based on a sample of 8,406 SME employers (excluding businesses with no employees)	2019 (latest available)	Survey includes coverage of businesses' export characteristics

[4] ONS, 2019, 'UK businesses: activity, size and location'
[5] ONS, 2018, 'UK businesses: exporters and importers by regional breakdown (Annual Business Survey)'
[6] HMRC, 2019, 'UK Regional Trade in Goods Statistics'
[7] BEIS, 2019, 'Longitudinal Small Business Survey'

2 Key findings

Department for International Trade

Profile of DIT supported businesses

Whether High Export Potential

(businesses with a turnover of £500k+ who have products or services suitable for export)

	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)
Whether High Export Potential	27%	89%	97%	98%

Export status

		Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)
Sustain (current exporters)	UK businesses accessing DIT support (ECS 2018-20)	71%	87%	92%	89%
	Registered businesses in the UK (NSRB 2018-19)	19%	34%	31%	50%
Reassure (exported before but not in the last 12 months)	UK businesses accessing DIT support (ECS 2018-20)	4%	2%	2%	1%
	Registered businesses in the UK (NSRB 2018-19)	9%	6%	4%	5%
Promote (self-identified potential exporters)	UK businesses accessing DIT support (ECS 2018-20)	25%	10%	6%	9%
	Registered businesses in the UK (NSRB 2018-19)	16%	12%	13%	13%

Whether export goods or services

		Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)
Goods only	UK businesses accessing DIT support (ECS 2018-20)	52%	55%	57%	41%
	Exporting businesses in the UK (ABS 2018)	35%	46%	46%	39%
Services only	UK businesses accessing DIT support (ECS 2018-20)	35%	29%	26%	40%
	Exporting businesses in the UK (ABS 2018)	55%	37%	34%	36%
Both	UK businesses accessing DIT support (ECS 2018-20)	13%	15%	16%	18%
	Exporting businesses in the UK (ABS 2018)	10%	17%	20%	25%

For more information, see findings from the ECS Descriptive Analysis report

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Business characteristics

Around half (53%) of the businesses that accessed export promotion services from DIT were micro-businesses (0 to 9 employees), while 27% were small (10 to 49 employees), 13% were medium (50 to 249 employees) and seven per cent were large (250 or more employees). The profile of businesses that accessed DIT export support were typically larger in employee size than exporting businesses and the wider business population as a whole.

Among businesses that accessed DIT export promotion services, 37% had a turnover below or equal to £500,000, 30% had a turnover between £500,000 to £4,999,999, six per cent had a turnover between £5 million to £9,999,999, eight per cent had a turnover between £10 million to £49,999,999 and 5% had a turnover greater than £50 million. Turnover increased with business size for these businesses. Compared with the population of exporting businesses, businesses that accessed export support tended to have a higher turnover.

The most common industry sectors for businesses that accessed export promotion services from DIT were, manufacturing (34%), wholesale or retail (17%) and arts, entertainment and recreation (8%). This profile of businesses was more heavily concentrated in the manufacturing sector than the population of exporting businesses (34% as measured in the ECS vs. 14% as measured in the ABS[8]).

Around half (53%) of businesses that accessed export promotion services had been trading (though not specifically exporting) for more than 10 years, while just 12% had been trading for less than 2 years. Business time trading was similar for the exporter population as a whole.

Around 9 in 10 businesses that accessed export promotion services said they planned to increase their turnover in the next 2 to 3 years through exporting activity (90%) or UK sales (88%). In addition, most of these businesses had plans to develop and launch new products and services (82%) and to make investment, either in R&D (69%) and capital investment (56%). The results were broadly consistent by business size, except that large businesses were less likely than other businesses to plan to increase turnover, while micro-businesses were less likely than others to be planning capital investments.

Exporting characteristics and behaviour

DIT developed a segmentation of UK businesses; grouping UK businesses into 4 segments which reflect their current export status and attitudes towards their potential to export. These segments are outlined in Table 2.1 below.

[8] ONS, 2018 'Annual Business Survey exporters and importers'

Table 2.1: Export status, as a %, for businesses that accessed export promotion services and all exporters in the UK

Segment	Definition	businesses that accessed export support	exporters in UK
Sustain	Exported goods or services in past 12 months	79	24
Reassure	Previously exported but not in past 12 months	3	8
Promote	Never exported but believe they have goods or services which could potentially be exported or developed for export	18	15
Challenge	Never exported and do not currently see their goods or services as suitable for export	0	42
Base		9,868 UK businesses that accessed export support (excluding don't know and missing responses)	3,000 Registered businesses in the UK
Source		ECS (2018-2020)	NSRB (2018-2020)

Note: All businesses who accessed export promotion services from DIT must think that they have products or services suitable for export, therefore we don't expect businesses in the 'Challenge' segment to seek export support from DIT.

Around 8 in 10 (79%) of businesses that accessed export promotion services from DIT were existing exporters in the 'Sustain' segment (they had exported goods or services in past 12 months), 3% were lapsed exports in the 'Reassure' segment (they had previously exported but not in the past 12 months) and a further 18% fell into the 'Promote' segment (not currently exporting but believe they have the potential to do so). Businesses in these three segments represent a pivotal target group for future DIT support and export growth through starting to export, exporting more intensely, and/or exporting to more destinations.

More than 8 in 10 current ('Sustain) and lapsed ('Reassure') exporters that accessed export promotion services had exported to Europe (86%) and to the EU specifically (83%). More than half had exported to other regions including Asia (63%), North America (57%) and the Middle East (53%). Less than half had exported to Africa (37%) or South America (29%).

While businesses that accessed export promotion services were more likely to export goods than services (53% only goods vs. 32% only services), the opposite applied to the population of exporting businesses (38% only goods vs. 50% only services). This may reflect, at least in part, the findings highlighted above, that businesses that accessed export promotion services were more heavily concentrated in the manufacturing sector than the population of exporting businesses.

Businesses that accessed export promotion services varied in the length of time that they had been exporting. This ranged from a year or less (10%) to over 20 years (24%).

Three in 10 current exporters that accessed export promotion services (30%) said that more than half of their turnover was accounted for by exports. By contrast, a similar proportion (28%) said that no more than 10% of their turnover was accounted for by exports. Results were similar across size bands, although micro-businesses were more likely to have a very high proportion of their turnover accounted for by exports.

Barriers to exporting

When asked about barriers to exporting, businesses that accessed export promotion services from DIT were most likely to say that access to contacts was a strong barrier (42%), followed by cost (31%), lack of knowledge (31%) and capacity (24%).

Compared with the wider population of exporters and potential exporters (as measured in the NSRB), businesses that accessed export promotion services were more likely to say that access to contacts was a barrier but were less likely to report capacity as a barrier. This may reflect that the profile of businesses that seek export support from DIT are more likely to already have the capacity, such as managerial time or staff capacity, to export. Considering the slightly larger size profile of businesses that accessed export support, this may also reflect their relative scale.

High Export Potential (HEP)

Among businesses that accessed export promotion services from DIT, 57% had a turnover that can be classified as High Export Potential (HEP). HEPs are defined as businesses with an annual turnover of £500,000 or more and having goods or services suitable for export. This compared to 28% for the wider exporting population (as measured in the NSRB[9]) and 16% of all UK businesses (as measured in the ONS[10]).

There was an apparent link between HEP turnover and number of employees. Among businesses that accessed export support, large businesses were more likely to be classified as a HEP (98%). This compares to 97% of medium-sized businesses, 89% of small businesses and 27% of micro-businesses.

The main differences between HEP and non-HEP businesses that accessed export support are described in Table 2.2 below.

[9] DIT, 2018, 'National Survey of Registered Businesses' exporting behaviours, attitudes and needs'
[10] ONS, 2019, 'UK businesses: activity, size and location'

Table 2.2: Main differences between HEP and non-HEP businesses that accessed export promotion services

Main differences	High Export Potential (HEP)	Non-High Export Potential (Non-HEP)
Industry sector	HEP businesses were more likely to be in the manufacturing sector.	Non-HEP businesses were more likely to be in wholesale or retail trades, or in arts, entertainment and recreation.
Time trading	HEP businesses have been trading for longer than non-HEP businesses and were more likely to have been exporting for longer.	Non-HEP businesses had been trading for less time than HEPs and were less likely to have been exporting for as long.
Export status	HEP businesses were more likely to fall into the ‘Sustain’ segment; exported goods or services in the past 12 months.	Non-HEP businesses were more likely to fall into the ‘Promote’ segment; never exported but believe they have goods or services which could potentially be exported or developed for export
Export regions	HEP businesses were more likely to export to a range of different regions in the world.	Non-HEP businesses were less likely than HEPs to export to a range of different regions of the world.
Goods and Services	HEP businesses had a slightly greater focus on exporting goods (rather than services) compared with non-HEP businesses.	Non-HEP businesses had less of a focus on exporting goods (rather than services), compared with HEP businesses.
Export to turnover proportion	HEP businesses were less likely to have a very high proportion of their turnover accounted for by exports.	Non-HEP businesses were more likely to have a very high proportion of their turnover accounted for by exports.

Source: ECS (2018 to2020)

Type of DIT export promotion services used

Half (50%) of businesses had just one engagement with a DIT export promotion service during the two years that they accessed export support, while 13% had more than 5 engagements.

The number of engagements differed according to business size. The larger the business the more likely they were to have more than 5 engagements. The average number of engagements was around three for micro and small businesses, but around five for large businesses.

Nearly 7 in 10 (69%) businesses used one type of DIT export promotion service over the two years that they accessed export promotion services, while almost 2 in 10 (19%) used 2 types of services and 13% used 3 or more.

Larger businesses tended to use more types of DIT services; almost a quarter (23%) of large businesses used 3 or more different DIT services compared to 9% of micro-businesses. Larger businesses were also more likely to use the range of face-to-face support available (Posts, Sector Teams, ITAs and OBNI), whereas smaller businesses were more likely to use ITAs (even compared to large businesses).

The DIT services that were most widely used during the 2-year period 2018 to 2020 were ITAs (48%), Posts (28%) and Export Opportunities (18%).

In total, 16% of businesses that accessed export promotion services used both digital and non-digital products or services. Two-thirds (66%) accessed non-digital services only (ITAs, TAP, Missions, OBNI, OMIS, Posts and Sector Teams), while 18% accessed only digital products (Business Profiles, Export Opportunities and Webinars).

The probability of a business receiving a certain service varied depending on which other services that they have accessed over the 2-year period. Some services had a relatively strong relationship with a wide range of other services, regardless of business size. For example, a quarter (25%) of business that had accessed TAP also accessed ITAs, whereas half (50%) of businesses that accessed OBNI also used ITAs.

The top three combinations of services that businesses used over the 2-year period were:

- Two-thirds of businesses that accessed OMIS, also used Posts (65%)
- Half of businesses that accessed OBNI, also accessed ITAs (50%)
- Just over 2 in 5 businesses that accessed OMIS also accessed ITAs (43%)

These combinations are in part to be expected due to the operating model of export promotion services and the types of services available throughout a business's exporting journey. For example, OMIS reports are delivered by posts and therefore it is not surprising that these 2 types of services are used together.

There were also some large differences in the proportion of businesses who accessed combinations of services depending on business size, this is covered in Appendix C.

3 Firm level characteristics

This section provides a summary of the characteristics of businesses that used DIT export promotion services. It compares them to the population of exporting businesses as well as all businesses in the UK. These businesses include those that were current exporters, as well as those that do not currently export.

Number of employees

Around half (53%) of the businesses that accessed export promotion services from DIT were micro-businesses (0 to 9 employees), while around a quarter (27%) were small (10 to 49 employees), 13% were medium (50 to 249 employees) and 7% were large (250 or more employees).

Businesses accessing DIT support were typically larger in size than exporting businesses and the wider business population. In the population of exporters, there were very few large businesses (2%), while three-quarters (75%) were micro-businesses. The comparison with the wider business population shows an even greater difference. Businesses in the UK were mostly micro-businesses (89%) and a very small proportion (2%) were medium or large.

Table 3.1: Number of employees, as a %, for businesses that accessed export promotion services, all exporting businesses and the UK business population

Business Size	Businesses that accessed export support[11]	All exporting businesses	UK business population
Micro (0-9 employees)	53	75	89
Small (10-49 employees)	27	19	9
Medium (50-249 employees)	13	5	2
Large (250+ employees)	7	2	0.4
Base	9,563 UK businesses that accessed export support (excluding don’t know and missing responses)	233,900 exporters in GB	2,718,435 registered businesses in UK
Source	ECS (2018 to2020)	ABS 2018	ONS UK Business: Activity, size and location (2019)

[11] ‘Don’t know’ and missing answers have been excluded

Turnover

Turnover increased with business size; 72% of large businesses that accessed export promotion services from DIT had a turnover greater than £10 million compared to 45% of medium-sized businesses, 8% of small businesses and 1% of micro businesses. The most businesses (21%) had a turnover between £83,000 to £500,000 and 5% of businesses had a turnover greater than £50 million.

Table 3.2: Turnover, as a %, among businesses that accessed export promotion services, by number of employees[12]

Annual turnover	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Up to £83,000	29	3	1	0	16
£83,000 to £500,000	36	6	1	1	21
£500,000 to £1,999,999	18	28	5	1	18
£2 million to £4,999,999	4	30	12	3	12
£5 million to £9,999,999	1	11	21	3	6
£10 million to £49,999,999	1	7	39	21	8
Over £50 million	0	1	6	51	5
Base	4,434	2,272	1,105	527	8,384

Base: 8,384 UK businesses that accessed export support (excluding don't know and missing responses)
Source: ECS (2018 to2020)

Businesses that accessed export promotion services tended to have a higher turnover than the population of exporting businesses. For example, 23% of businesses that accessed export promotion services had a turnover of £5 million or more, compared with 12% of exporters.

Exporting businesses tended to have a higher turnover than the business population as a whole, just 2% of whom had a turnover of £5 million or more.

12 'Don't know' and missing answers have been excluded

Table 3.3: Turnover, as a %, for businesses that accessed export support, all exporting businesses and the UK business population

Annual Turnover	Businesses that accessed export support[13]	All exporting businesses	UK business population
Less than £5 million	77	88	98
£5-10 million	7	5	1
£10-50 million	10	5	1
£50 million or more	5	2	0.3
Less than £500,000 (Non-HEP)	43	n/a[14]	84
£500,000 or more (HEP)	57	n/a[15]	16
Base	8,384 UK businesses that accessed export support (excluding don't know and missing responses)	233,900 exporters in GB	2,718,435 registered businesses in UK
Source	ECS (2018 to2020)	ABS 2018	ONS UK Business: Activity, size and location (2019)

Industry sector

A third of businesses that accessed export promotion services (34%) were in the manufacturing sector, while 17% were in wholesale or retail trades. Arts, entertainment and recreation was the third most common sector (8%) among businesses that accessed export promotion services.

The profile of businesses that accessed export promotion services was more heavily concentrated in the manufacturing sector than the population of exporting businesses (34% compared with 14%). In contrast, there was a lower representation of businesses in other sectors, compared with the exporter population. Specifically, wholesale and retail trades (17% of businesses that accessed DIT export support compared with 27% of the exporter population) and information and communication (2% of businesses that accessed DIT export support compared with 14% of the exporter population).

[13] 'Don't know' and missing answers have been excluded
[14] This figure is not available in the ABS data. The smallest turnover category available is £1,000,000.
[15] This figure is not available in the ABS data. The smallest turnover category available is £1,000,000.

A comparison with the wider business population indicates which sectors contained a relatively high or low proportion of exporters. For example, only 6% of the UK business population were in the manufacturing sector, but they were disproportionately likely to be exporters (14%) and to have accessed export promotion services (24%). The opposite applies to the construction sector, which accounted for 14% of all UK businesses but only a very small proportion of exporters (2%).

Table 3.4: Industry sector, as a %, for businesses that accessed export promotion services, all exporting businesses and the UK business population

Industry Sector	Businesses that accessed export support[16]	All exporting businesses	UK business population
Agriculture, forestry or fishing	2	*	1
Mining and quarrying	*	*	*
Electricity, gas, steam and air conditioning supply	2	*	*
Water supply, sewerage, waste management and remediation services	*	*	*
Manufacturing	34	14	6
Construction	4	2	14
Wholesale and retail trade	17	27	16
Hotels and restaurants	3	*	6
Transportation and storage	1	2	4
Information and communication	2	14	9
Finance and insurance	3	n/a	n/a
Real estate activities	*	1	4
Professional, scientific and technical activities	3	23	19
Administrative and support service activities	1	9	9
Education	6	1	2
Health and social work	6	1	3

[16] 'Don't know' and missing answers have been excluded

Industry Sector	Businesses that accessed export support[16]	All exporting businesses	UK business population
Public administration and defence	3	n/a	n/a
Arts, Entertainment and Recreation	8	4	3
Other	4	2	4
Base	7,885 UK businesses that accessed export support (excluding don't know and missing responses)	233,900 exporters in GB	2,424,700 registered businesses in GB
Source	ECS (2018 to2020)	ABS 2018	ABS 2018

The results were broadly consistent by business size, except that micro businesses were more likely than others to be in the wholesale and retail trade (21%) while large businesses were more likely to be in education (13%).

Table 3.5: Industry sector, as a %, for businesses that accessed export promotion services, by number of employees

Industry Sector	Micro (0-9)	Small (0-49)	Medium (50-249)	Large (250+)	Total
Agriculture, forestry or fishing	3	2	2	3	2
Mining and quarrying	*	1	*	1	*
Electricity, gas, steam and air conditioning supply	2	3	3	2	2
Water supply, sewerage, waste management and remediation services	*	*	*	*	*
Manufacturing	26	42	49	34	34
Construction	3	4	5	5	4
Wholesale and retail trade	21	14	10	9	17

Industry Sector	Micro (0-9)	Small (0-49)	Medium (50-249)	Large (250+)	Total
Hotels and restaurants	3	2	1	2	3
Transportation and storage	1	1	2	2	1
Information and communication	1	2	1	2	2
Finance and insurance	2	2	4	5	3
Real estate activities	*	*	*	*	*
Professional, scientific and technical activities	3	2	3	3	3
Administrative and support service activities	1	1	*	1	1
Education	7	5	5	13	6
Health and social work	7	5	4	5	6
Public administration and defence	3	3	4	6	3
Arts, Entertainment and Recreation	10	6	3	4	8
Other	5	4	3	3	4
Don’t know	*	*	*	*	1
Base	4,018	2,106	1,081	532	7,982

Base: UK businesses that accessed export support
Source: ECS (2018 to-2020)

Time trading

Around half (53%) of businesses that accessed export promotion services had been trading for more than 10 years, while just 12% had been trading for less than two years. This compares to 48% and 17% respectively of all exporting businesses. The proportion of businesses who had been trading for more than 10 years was lower (36%) in the business population which may indicate that exporters tend to be more established (trading for more than 10 years) than businesses as a whole.

Table 3.6: Time trading, as a %, for businesses that accessed export promotion services, all exporting businesses and the UK business population

Time trading	Businesses that accessed export support[17]	All exporting businesses	UK business population
Less than 2 years	12	17	32
2 to 4 years	12	13	13
4 to10 years	23	22	19
More than 10 years	53	48	36
Base	9,700 UK businesses that accessed export support (excluding don't know and missing responses)	233,900 exporters in GB	2,424,700 registered businesses in GB
Source	ECS (2018 to2020)	ABS 2018	ABS 2018

There is a relationship between time trading and number of employees. While only 30% of micro-businesses had been trading for more than 10 years, this proportion increased among small (69%), medium (89%) and large businesses (94%). This is similar to the time trading and number of employees patterns for the exporter population as a whole; around half of all exporters had been trading for more than 10 years (48%).

Table 3.7: Time trading, as a %, for businesses that accessed export promotion services, by number of employees

Time trading	Micro (0-9)	Small (0-49)	Medium (50-249)	Large (250+)	Total
Less than 2 years	21	3	1	*	12
2 to4 years	18	6	1	*	11
4 to10 years	30	20	8	5	23
More than 10 years	30	69	89	94	53
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

UK region

For businesses that accessed export promotion services, UK regional distribution was broadly consistent by business size. However, the concentration in London was most pronounced among micro-businesses (25% of micro-businesses were based in London) while there was a relatively high proportion of large businesses in Scotland (10% of large

[17] 'Don't know' and missing answers have been excluded

businesses were based in Scotland, compared with 4% of all businesses that accessed export support).

Exporting businesses as a whole had a similar regional profile to businesses that accessed export promotion services, except that there was an even greater concentration in London (28% of all exporting businesses compared with 22% of businesses that accessed export promotion services) and the South East (20% compared with 16% respectively).

More than 9 in 10 businesses that accessed export promotion services were based in England (93%), while 4% were in Scotland, 2% in Wales and 1% in Northern Ireland[18]. The proportions in the English regions ranged from 22% in London to 4% in the North East.

Table 3.8: UK region that businesses are based in, as a %, for businesses that accessed export promotion services, all exporting businesses and the UK business population

Regions	Businesses that accessed export support[19]	All exporting businesses	UK business population
North East	4	2	3
North West	10	8	10
Yorkshire and The Humber	8	5	7
East Midlands	6	7	7
West Midlands	8	6	8
East of England	10	11	10
London	22	28	19
South East	16	20	15
South West	8	6	9
England	93	93	87
Scotland	4	5	7
Wales	2	2	4
Northern Ireland	1	n/a	3
Base	9,632 UK businesses that accessed export support (excluding missing responses)	233,900 exporters in GB	2,718,435 registered businesses in UK
Source	ECS (2018 to2020)	ABS 2018	ONS UK Business: Activity, size and location (2019)

Future plans

As well as obtaining business characteristics, the ECS also asked what plans businesses have over the next 2 to 3 years. The majority of businesses that accessed export promotion

[18] 48% of businesses that accessed support from DIT used ITAs. ITA support is offered in England only which may account for some disparity in the findings.
[19] 'Missing' answers have been excluded

services planned to increase their turnover, based on both UK sales and exporting activity. In addition, most of these businesses had plans to develop and launch new products and services, and to make investment, either capital investment or in R&D.

The results were broadly consistent by business size, except that large businesses were less likely than other businesses to plan to increase turnover, while micro-businesses were less likely than others to be planning capital investments.

Table 3.9: Future plans, as a %, of businesses that accessed export promotion services, by number of employees

Future Plans	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Increase turnover based on UK sales	88	89	90	84	88
Increase turnover based on exporting activity	91	92	92	82	90
Make capital investment (in premises, machinery etc.)	51	60	68	59	56
Develop and launch new products/services	83	81	83	78	82
Make additional investment in R&D	68	74	74	66	69
Start exporting (lapsed exporters only)	3	2	1	1	2
None of these	2	2	1	4	2
Don't know	*	1	1	1	1
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

4 Exporting characteristics

Export status

DIT developed a segmentation of UK businesses; grouping UK businesses into four segments which reflect their current export status and views on their potential to export. These segments are:

- **Sustain**: this segment includes current exporters, defined as UK businesses which have exported goods or services in the past 12 months. In ECS, 4 in 5 businesses (79%) that accessed export support were in this segment.
- **Reassure**: this segment includes lapsed or intermittent exporters. These are UK businesses which had previously exported but have not done so in the past 12 months. Among businesses that accessed export promotion service, 3% of businesses were in this segment.
- **Promote**: this segment includes self-identified potential exporters. These are UK businesses which have never exported but believe they have goods or services which could potentially be exported or developed for export. The ECS sample of businesses that accessed export promotion services included 18% that were in this segment.
- **Challenge**: this segment includes non-exporters, defined as UK businesses which have never exported and do not currently see their goods or services as suitable for export. This segment does not appear in the ECS sample, as by definition businesses that accessed export support must have exported or think they have the potential to do so in the future.

Analysis by business size shows a difference between micro-businesses and other businesses that accessed export promotion services. Around 7 in 10 micro-businesses (71%) were in the 'Sustain' segment, compared with around 9 in 10 among small, medium and large businesses. Micro-businesses were more likely than others to be in the 'Promote' segment (25%).

Table 4.1: Export status of businesses that accessed export promotion services, as a %, by number of employees

Segment	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Sustain	71	87	92	89	79
Reassure	4	2	2	1	3
Promote	25	10	6	9	18
Not known	*	*	*	1	*
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

The same segmentation has been used in the 'National Survey of Registered Businesses' (NSRB) for all registered businesses. Among the business population as a whole, around a quarter (24%) were in the 'Sustain' segment, while 42% were in the 'Challenge' segment. The proportion in the 'Sustain' segment ranged from 19% among micro-businesses to 50% among large businesses.

Table 4.2: Export status, as a %, among all registered businesses in the UK, by number of employees

Segment	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Sustain	19	34	31	50	24
Reassure	9	6	4	5	8
Promote	16	12	13	13	15
Challenge	43	41	41	27	42
Base	1,091	1,115	569	225	3,000

Base: Registered businesses in the UK
Source: NSRB (2018 to2019)

The 'Longitudinal Small Business Survey' (LSBS) produces similar figures to the NSRB for the population of small and medium-sized enterprises (SME). According to the LSBS, 1 in 5 micro-employers (19%) were in the 'Sustain' segment, as were 25% of small employers and 33% of medium employers. Around 1 in 6 were in the 'Promote' segment (17% of micro-employers, and 14% each of small and medium employers)[20].

Population estimates from the 'Annual Business Survey' (ABS) suggest that a lower proportion of the business population were current exporters. Overall, ABS figures show that 10% of all registered businesses in Great Britain were exporters, specifically 8% of micro-businesses, 20% of small businesses, 35% of medium businesses and 42% of large businesses. These figures are lower than those seen in NSRB and LSBS (except for medium businesses where the figures are very similar). However, it is important to note the differences between the different sources. In particular, ABS identifies 'current exporters' (whereas the NSRB and LSBS surveys identify businesses that have exported in the previous 12 months).

Export regions

The ECS asked current and lapsed exporters that accessed export promotion services from DIT which regions they had exported to. More than 8 in 10 had exported to Europe (86%) and to the EU specifically (83%), while more than half had exported to other regions including Asia (63%), North America (57%) and the Middle East (53%). Less than half had exported to Africa (37%) or South America (29%).

Larger businesses were more likely to export to different regions, particularly to regions outside of Europe. For example, the proportion that exported to Africa was twice as high among large businesses than micro-businesses (57% compared with 29% respectively).

[20] LSBS has different questions to produce the 'promote' category. LSBS asks businesses 'Do you have plans to start exporting or licensing your goods or services outside the UK?' and then (if no) 'Does your organisation have any goods or services that are suitable for exporting? Businesses that answered 'yes' at either question are included in the 'Promote' segment in this analysis.

Table 4.3: Regions exported to, as a %, among businesses that accessed export promotion services, by number of employees

Regions	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Europe	80	91	92	91	86
• **EU**	76	88	89	89	83
Asia	54	69	75	80	63
North America	51	60	65	69	57
Middle East	42	59	66	70	53
Africa	29	40	48	57	37
South America	20	33	38	48	29
Base	3,734	2,379	1,224	587	8,179

Base: UK businesses that accessed export support and are current or lapsed exporters
Source: ECS (2018 to2020)

No sources provide directly comparable data on export regions, although LSBS asked all SMEs that were current exporters whether they exported to different countries and regions. LSBS figures for exporting to the EU were very similar to ECS: 78% of micro-businesses, 88% of small businesses and 87% of medium businesses. However, fewer than half of exporting businesses in LSBS said they exported to the USA[21]; 40% of micro-businesses, 45% of small businesses and 50% of medium businesses.

HMRC UK Regional Trade in Goods Statistics produce annual data on exports in goods (in £) by country group. 2019 data showed that:

- 55% of UK export value was to Europe, including 48% to the EU
- 18% was to North America
- 17% to Asia and Oceania
- 5% to the Middle East and North Africa
- 2% to Sub-Saharan Africa
- 1% to Latin America and the Caribbean

Goods and services

Businesses that accessed export promotion services were more likely to export goods (53%) than services (32%), while 15% exported both. This analysis is based on current or lapsed exporters; the figures remain the same when the analysis is limited to current exporters only (those that had exported in the previous 12 months).

The focus on goods rather than services was more pronounced for micro, small and medium businesses. Among large businesses, there was an even split between exporters of goods (41%) and services (40%).

[21] Note that LSBS asks about exporting to 'USA' whereas ECS asks about 'North America'.

Table 4.4: Exporting of goods and services, as a %, among businesses that accessed export promotion services, by number of employees

Category	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Goods	52	55	57	41	53
Services	35	29	26	40	32
Both	13	15	16	18	15
Not known	1	*	*	1	*
Base	3,734	2,379	1,224	587	8,179

Base: UK businesses that accessed export support and were current or lapsed exporters
Source: ECS (2018 to2020)

While businesses that accessed export promotion services were more likely to export goods than services, the opposite applied to the population of exporting businesses (38% vs. 50%). This difference was most pronounced among micro-businesses. Among micro-businesses that accessed export promotion services, 52% only exported goods and 35% only exported services, but in the population of exporters, 35% of micro-businesses only exported goods while 55% only exported services. These differences are statistically significant.

Table 4.5: Exporting of goods and services, as a %, for businesses that accessed export promotion services, all exporting businesses and the UK business population

Category	Businesses that accessed export support	All exporting businesses	UK business population
Goods only	53	38	4
Services only	32	50	5
Both	15	12	1
Not known	*	0	0
Base	9,868 UK businesses that accessed export support	233,900 exporters in GB	2,424,700 registered businesses in GB
Source	ECS (2018 to2020)	ABS 2018	ABS 2018

Export history

Businesses that accessed export promotion services varied in the length of time that they had been exporting. This ranged from a year or less (10%) to over 20 years (24%). As expected, larger businesses tended to have been exporting for longer than smaller businesses: more than half of large businesses (56%) had been exporting for over 20 years, compared with 10% of micro-businesses.

Table 4.6: Export history, as a %, among businesses that accessed export promotion services by number of employees

Years Exporting	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
1 year or less	17	5	4	1	10
2-5 years	41	23	14	10	29
6-10 years	19	21	15	12	19
11-20 years	13	23	19	19	17
Over 20 years	10	26	45	56	24
Don't know	1	1	3	2	2
Net: in last 5 years	57	28	18	11	39
Base	3,734	2,379	1,224	587	8,179

Base: UK businesses that accessed export promotion services and were current or lapsed exporters
Source: ECS (2018 to2020)

LSBS[22] obtained equivalent information for all SME businesses that had exported in the previous 12 months. The data suggests that the population of SME exporting businesses tended to have been exporting for longer than the businesses that accessed export promotion services. While the difference is marginal for medium businesses, there is a larger difference for micro and small businesses. For example, 22% of micro-businesses in the population had been exporting for less than 5 years, compared with 58% of businesses that accessed export support.

Table 4.7: Export history, as a %, among SME employers

Years Exporting	Micro (0-9)	Small (10-49)	Medium (50-249)	Total
In last 5 years	22	14	12	20
6 to10 years	24	20	19	23
11 to20 years	27	28	21	27
Over 20 years	23	35	41	26
Don't know	4	4	6	4
Base	770	756	549	2,075

Base: SME Employers in the UK that export goods or services
Source: LSBS (2019)

Export to turnover proportion

Three in 10 current exporters that accessed export promotion services (30%) said that more than half of their turnover was accounted for by exports. By contrast, a similar proportion (28%) said that no more than 10% of their turnover was accounted for by exports.

Results were similar across size bands, although micro-businesses were more likely to have a very high proportion of their turnover accounted for by exports.

[22] Note that LSBS asks about 'licensing products overseas' as well as selling goods and services.

Table 4.8: Proportion of turnover accounted for by exports, as a %, among businesses that accessed export promotion services by number of employees

Turnover brackets	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
0 to 5%	18	16	19	23	18
6 to 10%	10	10	11	13	10
11 to 25%	14	17	15	14	15
26 to 50%	22	23	23	17	22
51 to 75%	12	15	13	11	13
More than 75%	21	15	13	11	17
Don't know	2	4	5	9	4
Base	3,554	2,326	1,197	580	7,906

Base: UK businesses that accessed export promotion services and were current exporters
Source: ECS (2018 to2020)

LSBS is the one data source that provides comparable data. The data shows that, in the population of current exporters, around half of SME employers had no more than 10% of their turnover accounted for by exports (48%). This was considerably higher than in the sample of businesses that accessed export support (28%). This may suggest that businesses that accessed support from DIT typically had a stronger export focus in their business than exporting businesses in the population.

Table 4.9: Proportion of turnover accounted for by goods exports, as a % among SME employers

Turnover brackets	Micro	Small	Medium	Total
0 to 5%	44	41	36	43
6 to 10%	14	13	10	13
11 to 25%	15	15	14	15
26 to 50%	13	13	14	13
51 to 75%	5	8	10	6
More than 75%	6	5	9	6
Don't know	3	7	9	4
Base	455	516	399	1,370

Base: SME Employers in the UK that exported goods
Source: LSBS (2019)

Table 4.10: Proportion of turnover accounted for by services exports, as a % among SME employers

Turnover brackets	Micro	Small	Medium	Total
0 to 5%	34	37	40	34
6 to 10%	15	11	10	14
11 to 25%	12	13	12	12
26 to 50%	14	13	12	14
51 to 75%	7	9	6	7
More than 75%	14	9	5	13
Don't know	4	8	15	5
Base	404	354	255	1,013

Base: SME Employers in the UK that exported services
Source: LSBS (2019)

5 Barriers to exporting

This section summarises ECS data on the barriers to exporting among businesses that used a DIT service between April 2018 to March 2020. Findings are compared with relevant data from the 'National Survey of Registered Businesses' (NSRB) (Waves 3 and 4).

In the ECS, businesses were asked about four potential barriers for their business in relation to exporting; specifically, how much of a barrier they considered each one was for their business using a scale from 10 (very strong barrier) to zero (not a barrier at all). In particular, they were asked about barriers related to access to contacts, customers and networks; lack of knowledge; capacity and cost. Among businesses that accessed export promotion services, the most cited strong barriers – defined as a score of 7 or more out of ten – to exporting was access to contacts (42% of businesses said this was a strong barrier), followed by cost and lack of knowledge (31% of businesses said both cost and lack of knowledge were strong barriers). Capacity was least likely to be seen as a strong barrier to exporting (24% of businesses gave a score of seven or more out of 10).

Smaller businesses (micro and small) were more likely to cite all four potential barriers as strong barriers to exporting, and this applied in particular to access to contacts, compared to other business sizes. The proportion that saw access to contracts as a barrier ranged from 45% among micro-businesses to 27% among large businesses.

Table 5.1: Barriers to exporting among businesses that accessed export promotion services by number of employees (% saying barriers were strong)

Potential barriers	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Access to contacts	45	41	38	27	42
Cost	33	29	30	27	31
Lack of knowledge	32	32	28	24	31
Capacity	26	22	21	20	24
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support; the precise base for each barrier varies, as the analysis excludes 'not applicable' cases.
Source: ECS (2018-2020)

The same question was asked in Wave 3 of NSRB and was asked of businesses which currently exported or which self-classified as being potentially able to export (that is, equivalent to the 'Sustain', 'Reassure' and 'Promote' categories). In the NSRB, around 3 in 10 of all businesses reported each of the four barriers as strong. These proportions were similar to those seen in the ECS, except that the wider population covered in NSRB was more likely to see capacity as a barrier (31% as measured in NSRB compared with 24% as measured in ECS), but less likely to say that access to contacts was a barrier (33% as measured in NSRB compared with 42% as measured in in ECS). These differences are statistically significant.

Table 5.2: Barriers to exporting among businesses that accessed export promotion services by number of employees (% saying barriers were strong)

Potential barriers	Micro (0-9)	Small (10-19)	Small (20-49)	Medium (50-249)	Large (250+)	Total
Access to contacts	32	37	38	33	43	33
Cost	28	43	22	12	13	28
Lack of knowledge	31	21	44	38	12	30
Capacity	31	30	21	39	38	31
Base	601	235	277	331	143	1,5875

Base: Registered businesses in the UK whose products/services are suitable for export
Source: NSRB wave 3 (2017 to2018)

Wave 3 of NSRB included follow-up questions to identify specific types of barriers under the four headings. This showed that:

- among businesses that cited **cost** as a strong barrier, transportation costs from the UK to the destination country was the most commonly selected cost related issue, followed by exchange rate fluctuations, the relatively high price of their goods/services compared with those in the destination country, and the cost of scaling up the business
- where **knowledge** was cited as a strong barrier, this was most frequently related to ‘knowledge of other legal issues’ or knowledge of customs and tariffs
- among businesses for whom **capacity** was a strong barrier, lack of managerial time was the most frequently selected barrier, followed by not having enough staff to expand operations and then a number of issues concerning specific skills and training
- among those businesses for whom **access** was a strong barrier, understanding who to make contact with in the first instance was the most widespread issue, followed by developing or nurturing relationships, and finding overseas customers

The style of the question was changed in Wave 4 NSRB data; businesses were asked whether they had enough capacity and capability to focus on exporting. This was asked of businesses that were either already exporting or said that they had products and/or services that could be exported. Although this question is not strictly comparable with ECS, it provides useful contextual information. For example, the NSRB categories of managerial time and staff capacity are relevant to the ECS category of ‘capacity, while the various ‘capability’ items in NSRB are relevant to the ECS category of ‘lack of knowledge’.

Table 5.3: Whether businesses have enough capacity and capability to focus on exporting (% saying 'yes')

Capacity and capability barriers	Total
Capability to assess the cost of exporting (costing products, taxes, transport etc)	57
Capability to develop an export business plan	53
Managerial time	48
Capability to assess international competition for your product or service to focus on exporting	45
Staff capacity	40
Capability to undertake a market research study	34

Base: All registered businesses in the UK who believe products and/or services could be exported (1,789)
Source: NSRB Wave 4 (2018 to2019)

6 High Export Potential (HEP)

As well as examining the total sample from the ECS, this section provides an analysis of the ECS data for businesses that can be classified as High Export Potential (HEP). HEPs are defined as having an annual turnover of £500,000 or more and having goods or services suitable for export. All businesses that took part in the ECS have used an exporting service and therefore all businesses believed that they had goods or services suitable for export.

Summary of HEP businesses

Between 2018 and 2020, around 6 in 10 businesses (57%) that accessed export promotion services from DIT had a turnover greater than £500,000 and can be classified as High Export Potential (HEP). Comparing businesses that accessed export promotion services from DIT with the wider population of exporters and businesses as a whole, 28% of current exporters, and 16% of all UK businesses had a HEP turnover.

Table 6.1: Turnover, as a %, for businesses that accessed export promotion services, all exporting businesses and the UK business population

Turnover	Businesses that accessed export support[23]	All exporting businesses	UK business population
HEP	57	28	16
Not HEP	43	72	84
Base	8,384 UK businesses that accessed export support (excluding don't know and missing responses)	1,080 exporters in UK	2,718,435 registered businesses in UK
Source	ECS (2018 to2020)	NSRB (2018 to2019)	ONS UK Business: Activity, size and location (2019)

As expected, there was a relationship between turnover and number of employees. Among businesses that accessed export promotion services, less than a third (27%) of micro-businesses had a HEP turnover, compared with 9 in 10 small businesses (89%), and nearly all medium (97%) and large businesses (98%).

[23] 'Don't know' and missing answers have been excluded

Table 6.2: HEP turnover, as a %, among businesses that accessed export promotion services, by number of employees[24]

Annual turnover	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Less than £500,000	73	11	3	2	43
£500,000 or more (HEP)	27	89	97	98	57
Base	4,434	2,272	1,105	527	8,384

Base: 8,384 UK businesses that accessed export support (excluding don't know and missing responses)
Source: ECS (2018-2020)

Industry sector

As noted in Chapter 3, the total sample of businesses that accessed export promotion services from DIT were most likely to be in the manufacturing sector (34%) or wholesale or retail trades (17%). A comparison of the sector profiles of HEP and non-HEP businesses that accessed export promotion services indicates that HEP businesses were also more likely to be in the manufacturing sector compared with non-HEP businesses (40% HEP vs. 26% non-HEP). In contrast, HEPs were less likely to be in wholesale or retail trades (15% HEP compared with 21% non-HEP) or in arts, entertainment and recreation (5% HEP compared with 11% non-HEP).

[24] 'Don't know' and missing answers have been excluded

Table 6.3: Industry sector, as a %, for businesses that accessed export promotion services, by HEP turnover[25]

Industry sector	HEP	Non-HEP	Total
Agriculture, forestry or fishing	2	3	2
Mining and quarrying	1	1	1
Electricity, gas, steam and air conditioning supply	3	1	2
Water supply, sewerage, waste management and remediation services	*	*	*
Manufacturing	40	26	34
Construction	5	3	4
Wholesale and retail trade	15	21	17
Hotels and restaurants	2	3	3
Transportation and storage	2	1	1
Information and communication	2	2	2
Finance and insurance	3	2	3
Real estate activities	*	*	*
Professional, scientific and technical activities	3	3	3
Administrative and support service activities	1	1	1
Education	5	9	6
Health and social work	5	7	6
Public administration and defence	4	3	3
Arts, Entertainment and Recreation	5	11	8
Other	4	4	4
Base	3,968	2,847	7,885

Base: 7,885 UK businesses that accessed export support (excluding don't know and missing responses)
Source: ECS (2018 to2020)

[25] 'Don't know' and missing answers have been excluded

Among HEP businesses, small and medium sized businesses were more likely to be in the manufacturing sector (44% and 50% respectively) compared with large businesses (34%) and micro-businesses (29%). Micro-businesses that were HEP were more likely to be in the wholesale and retail trade sector (23%) compared with small (14%), medium (10%) and large (9%) businesses. Large HEP businesses were more likely to be in the education sector (12%) compared with micro (3%), small (4%) and medium-sized (4%) HEP businesses.

Due to low bases sizes, it is not possible to look at differences in Non-HEP businesses by employee size.

Table 6.4: Industry sector, as a %, for HEP businesses that accessed export promotion services by employee size[26]

Industry Sector	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
Agriculture, forestry or fishing	3	2	2	2
Mining and quarrying	*	*	1	1
Electricity, gas, steam and air conditioning supply	2	3	3	2
Water supply, sewerage, waste management and remediation services	*	*	*	*
Manufacturing	29	44	50	34
Construction	5	4	5	5
Wholesale and retail trade	23	14	10	9
Hotels and restaurants	2	2	2	2
Transportation and storage	1	1	2	2
Information and communication	1	2	1	2
Finance and insurance	3	2	3	5
Real estate activities	*	*	*	*
Professional, scientific and technical activities	3	3	3	3
Administrative and support service activities	1	1	*	1
Education	3	4	4	12

[26] 'Don't know' and missing answers have been excluded

Industry Sector	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
Health and social work	8	4	4	4
Public administration and defence	3	3	4	6
Arts, Entertainment and Recreation	6	6	3	4
Other	5	4	3	4
Base	987	1,590	856	426

Base: 3,859 UK HEP businesses that accessed export support (excluding don't know and missing responses)
Source: ECS (2018 to2020)

Time trading

Around half (53%) of all businesses that accessed export promotion services from DIT had been trading for more than 10 years. HEP businesses tended to have been trading for longer than non-HEP businesses: around three-quarters of HEP businesses (76%) had been trading for more than 10 years, compared with around a quarter of non-HEP businesses (26%).

Table 6.5: Time trading, as a %, for businesses that accessed export promotion services, by HEP turnover

Time trading	HEP	Non-HEP	Total
Less than 2 years	3	23	12
2 to4 years	5	21	12
4 to10 years	19	30	22
More than 10 years	73	26	53
Base	4,855	3,529	9,868

Base: 9,868 UK businesses that accessed export support
Source: ECS (2018 to2020)

Among HEP businesses, medium and large businesses were more likely to have been trading for more than 10 years (90% and 94% respectively), compared with around three-quarters of small sized businesses (74%) and around half of micro-businesses (48%).

Table 6.6: Time trading, as a %, for HEP businesses that accessed export support, by employee size

Time trading	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
Less than 2 years	8	2	1	1
2 to4 years	13	5	1	5
4 to10 years	32	20	8	94
More than 10 years	48	74	90	*
Base	1,200	2,028	1,077	518

Base: 3,529 UK HEP businesses that accessed export support
Source: ECS (2018-2020)

UK region

The regional profile for businesses that accessed export promotion services was similar for HEP and non-HEP businesses. The main differences were that HEP businesses were more likely to be based in Scotland, Wales or Northern Ireland (8% HEP compared with 5% non-HEP) and were less likely to be based in London (19% HEP compared with 24% non-HEP).

Table 6.7: UK region that businesses are based in, as a %, for businesses that accessed export promotion services, by HEP turnover[27]

UK region	HEP	Non-HEP	Total
England	92	95	93
Scotland	5	3	4
Wales	2	1	2
Northern Ireland	1	1	1
North East	4	6	4
North West	11	11	10
Yorkshire and The Humber	9	8	8
East Midlands	7	6	6
West Midlands	10	7	8
East of England	10	9	10
London	19	24	22
South East	16	17	16
South West	8	8	8
Base	4,753	3,444	9,632

Base: 9,632 UK businesses that accessed export support (excluding missing responses)
Source: ECS (2018 to2020)

Among HEP businesses, large businesses were more likely to be based in Scotland (10%) compared with micro (3%), small (4%) and medium sized businesses (5%). Micro businesses were more likely to be based in London (23%) compared with small (18%), medium (15%) and large (20%) businesses.

[27] 'Don't know' and missing answers have been excluded

Table 6.8: UK region that businesses are based in, as a %, for HEP businesses that accessed export promotion services, by employee size

UK region	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
England	94	92	92	85
Scotland	3	4	5	10
Wales	2	2	2	3
Northern Ireland	0	1	1	2
North East	3	4	4	3
North West	10	10	11	10
Yorkshire and The Humber	7	9	9	8
East Midlands	6	6	9	6
West Midlands	9	9	11	10
East of England	11	11	9	8
London	23	18	15	20
South East	16	17	16	14
South West	7	8	8	8
Base	1,184	2,000	1,050	489

Base: 4,752 UK HEP businesses that accessed export support (excluding missing responses)
Source: ECS (2018 to2020)

Future plans

When asked about their future plans over the next 2 to 3 years, the majority of businesses that accessed export promotion services planned to increase their turnover, based on both UK sales and exporting activity. In addition, most of these businesses had plans to develop and launch new products and services, and to make investment, either capital investment or in R&D.

HEP businesses were more likely than non-HEP businesses to say they planned to make additional investments in R&D (74% HEP compared with 68% non-HEP) and to make capital investments (64% HEP compared with 51% non-HEP). Otherwise, future plans were similar for the 2 groups.

Table 6.9: Future plans, as a %, for businesses that accessed export promotion services by HEP turnover

Future plans	HEP	Non-HEP	Total
Increase turnover based on UK sales	90	88	88
Increase turnover based on exporting activity	93	91	90
Make capital investment, such as in premises and/or machinery	64	51	56
Develop and launch new products/services	83	84	82
Make additional investment in R&D	74	68	69
Start exporting (lapsed exporters only)	1	4	2
None of these	1	2	2
Don't know	*	*	1
Base	4,855	3,529	9,868

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Micro (94%), small (93%) and medium (94%) businesses that were HEP were more likely than large HEP businesses (86%) to have plans to increase turnover based on exporting activity. Medium HEP businesses were more likely than other sizes of businesses to have plans to make capital investment.

Table 6.10: Future plans, as a %, of HEP businesses that accessed export promotion services by employee size

Future plans	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
Increase turnover based on UK sales	87	92	92	87
Increase turnover based on exporting activity	94	93	94	86
Make capital investment, such as in premises and/or machinery	57	64	72	64
Develop and launch new products/services	85	82	85	81
Make additional investment in R&D	72	75	77	69
Start exporting (lapsed exporters only)	2	1	1	1
None of these	1	1	1	3
Don't know	0	0	0	0
Base	1,200	2,028	1,077	518

Base: UK HEP businesses that accessed export support
Source: ECS (2018 to2020)

Export status

Around 8 in 10 (79%) of all businesses that accessed export promotion services were current exporters in the 'Sustain' segment and this was higher among HEP businesses compared with non-HEP businesses (89% HEP vs. 68% non-HEP). A further 3% of all businesses that accessed export promotion services were lapsed exporters in the 'Reassure' segment; 2% of HEP and 4% of non-HEP businesses. The ECS sample of businesses that accessed export promotion services included 18% in the 'Promote' segment; not currently exporting but believe they have the potential to do so. Businesses falling into this segment was higher among non-HEP than HEP businesses (28% non-HEP vs. 9% HEP).

Table 6.11: Export status, as a %, of businesses that accessed export promotion services by HEP turnover

Export Status	HEP	Non-HEP	Total
Sustain	89	68	79
Reassure	2	4	3
Promote	9	28	18
Not known	*	*	*
Base	4,855	3,529	9,868

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Among HEP businesses, micro-businesses were more likely to be in the 'Promote' segment (13%) compared with small (9%), medium (5%) or large (7%) businesses, and less likely to be in 'Sustain'.

Table 6.12: Export status, as a %, of HEP businesses that accessed export promotion services by employee size

Export status	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
Sustain	85	89	93	91
Reassure	2	2	2	1
Promote	13	9	5	7
Not known	*	*	*	*
Base	1,200	2,028	1,077	518

Base: UK HEP businesses that accessed export support
Source: ECS (2018 to2020)

The same segmentation has been used in the NSRB for all registered businesses. Comparing the ECS and NSRB (Tables 6.12 and 6.13), 9 in 10 HEP businesses that accessed export promotion services were in the 'Sustain' segment (89%), compared with 33% in the wider business population. Among non-HEP businesses, 68% of those that accessed export promotion services were in the 'Sustain' segment, compared with 22% in the wider business population. As all businesses who accessed export promotion services from DIT must think that they have products or services suitable for export so will fall into the 'Sustain', 'Reassure' or 'Promote' segments. We don't anticipate businesses in the 'Challenge' segment to seek export support from DIT.

Table 6.13: Export status, as a %, among all registered businesses in the UK, by number of employees

Export status	HEP	Non-HEP	Total
Sustain	33	22	24
Reassure	7	9	8
Promote	13	16	15
Challenge	38	42	42
Base	2,448	552	3,000

Base: Registered businesses in the UK
Source: NSRB (2018 to2019)

Export regions

Among businesses that accessed export promotion services, more than 8 in 10 current and lapsed exporters had exported to Europe (86%) and more than half had exported to other regions including Asia (63%), North America (57%) and the Middle East (53%).

HEP businesses were more likely than non-HEP businesses to export to the different regions, including to Europe (90% HEP compared with 78% non-HEP). The largest difference was in the proportion that exported to the Middle East (60% HEP compared with 38% non-HEP).

Table 6.14: Regions exported to, as a %, among businesses that accessed export promotion services by HEP turnover

Export regions	HEP	Non-HEP	Total
Europe	90	78	86
• **EU**	87	75	83
Asia	68	54	63
North America	60	51	57
Middle East	60	38	52
Africa	42	27	37
South America	32	20	29
Base	4,460	2,554	8,179

Base: UK businesses that accessed export support and are current or lapsed exporters
Source: ECS (2018 to2020)

Goods and services

Current or lapsed exporters that accessed export promotion services from DIT were more likely to export goods than services (53% only goods vs. 32% only services), while 15% exported both.

The focus on goods rather than services was slightly more pronounced for HEP businesses than non-HEP businesses (56% only goods for HEPs vs. 49% only goods for non-HEPs).

Table 6.15: Exporting of goods and services, as a %, among businesses that accessed export promotion services by HEP turnover

Exporting product	HEP	Non-HEP	Total
Goods only	56	49	53
Services only	28	39	32
Both	16	12	15
Not known	*	1	1
Base	4,460	2,554	8,179

Base: UK businesses that accessed export support and were current or lapsed exporters
Source: ECS (2018 to2020)

Among HEP businesses, large businesses were less likely to export goods only (40%) compared with more than half of micro (59%), small (58%) and medium (58%) sized businesses. Large businesses were more likely to export services only (41%) compared with around a quarter of smaller businesses (28%).

Table 6.16: Exporting of goods and services, as a %, among HEP businesses that accessed export promotion services by employee size

Exporting product	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
Goods only	59	58	58	40
Services only	26	28	26	41
Both	15	15	16	19
Not known	*	*	*	1
Base	1,055	1,867	1,026	481

Base: UK HEP businesses that accessed export support and were current or lapsed exporters
Source: ECS (2018 to2020)

Export history

Businesses that accessed export promotion services varied in the length of time that they had been exporting. There was a clear difference between HEP and non-HEP businesses, with HEP businesses more likely to have been exporting for longer: around a third (32%) of HEP businesses had been exporting for over 20 years, compared with 8% of non-HEP businesses. In contrast, 43% of non-HEP businesses had been exporting between 2 to 5 years compared with 22% of HEP businesses.

Table 6.17: Export history, as a %, among businesses that accessed export promotion services by HEP turnover

Export history	HEP	Non-HEP	Total
1 year or less	5	19	10
2 to5 years	22	43	29
6 to10 years	20	18	19
11to 20 years	21	11	17
Over 20 years	32	8	24
Don't know	1	1	2
Net: in last 5 years	27	62	39
Base	4,460	2,554	8,179

Base: UK businesses that accessed export support and were current or lapsed exporters
Source: ECS (2018 to2020)

Among HEP businesses, large businesses were more likely to have been exporting for more than 20 years (56%) compared to other business sizes. For example, 35% of micro businesses had been exporting between 2 to 5 years compared with 10% of large businesses.

Table 6.18: Export history, as a %, among HEP businesses that accessed export promotion services by employee size

Export history	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
1 year or less	9	4	4	1
2 to5 years	35	22	14	10
6 to10 years	23	21	16	13
11 to20 years	18	24	18	19
Over 20 years	14	28	45	56
Don't know	1	1	3	1
Net: in last 5 years	44	26	18	11
Base	1,055	1,867	1,026	481

Base: UK HEP businesses that accessed export support and were current or lapsed exporters
Source: ECS (2018 to2020)

Export to turnover proportion

Three in 10 current exporters that accessed export promotion services (30%) said that more than half of their turnover was accounted for by exports. Results were similar for HEP and non-HEP businesses, although non-HEP businesses were more likely to have a very high proportion of their turnover accounted for by exports.

Table 6.19: Proportion of turnover accounted for by exports, as a %, among businesses that accessed export promotion services by HEP turnover

Proportion of turnover accounted for by exports	HEP	Non-HEP	Total
0 to5%	19	20	18
6 to10%	12	10	10
11 to25%	16	14	15
26 to50%	23	22	22
51to75%	13	12	13
More than 75%	15	21	17
Don't know	2	0	4
Base	4,370	2,407	7,906

Base: UK businesses that accessed export support and were current exporters
Source: ECS (2018 to2020)

Among HEP businesses, micro-businesses were more likely to have more than 75% of their turnover accounted for by exports (20%) compared with small (11%), medium (11%) or large (10%) HEP businesses. These findings concur with the data for all businesses that accessed export support from DIT; micro businesses were more likely to have more than 75% of their turnover accounted for by exports (21%).

Table 6.20: Proportion of turnover accounted for by exports, as a %, among HEP businesses that accessed export promotion services by number of employees

Proportion of turnover accounted for by exports	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
0 to5%	29	26	26	31
6 to10%	10	10	11	13
11 to25%	12	17	15	12
26 to50%	19	22	23	17
51 to75%	9	13	12	10
More than 75%	20	11	11	10
Don't know	1	1	1	6
Base	1,200	2,028	1,077	518

Base: UK HEP businesses that accessed export support and were current exporters
Source: ECS (2018 to2020)

Barriers to exporting

In the ECS, businesses were asked about four potential barriers for their business in relation to exporting; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to zero (not a barrier at all). The most common barrier was access to contacts (42% gave a score of 7 or more out of 10).

Non-HEP businesses were slightly more likely to report each of the four barriers as strong – a score of 7 or more out of 10 - than HEP businesses.

Table 6.21: Barriers to exporting among businesses that accessed export promotion services by HEP turnover

Barriers to exporting	HEP	Non-HEP	Total
Access to contacts	41%	45%	42%
Base	4,787	3,467	9,670
Cost	29%	34%	31%
Base	4,735	3,444	9,543
Lack of knowledge	30%	33%	31%
Base	4,782	3,468	9,649
Capacity	22%	28%	24%
Base	4,731	3,387	9,485

Base: UK businesses that accessed export support; the precise base for each barrier varies, as the analysis excludes ‘not applicable’ cases.
Source: ECS (2018 to2020)

Among HEP businesses, access to contacts was less likely to be cited as a strong barrier among large businesses (28%) compared with micro (44%), small (42%) or medium (40%).

Table 6.22: Barriers to exporting among HEP businesses that accessed export promotion services by employee size

Barriers to exporting	Micro HEP (0-9)	Small HEP (10-49)	Medium HEP (50-249)	Large HEP (250+)
Access to contacts	44%	42%	40%	28%
Base	1,185	1,999	1,065	505
Cost	30%	29%	30%	29%
Base	1,172	1,983	1,057	493
Lack of knowledge	30%	32%	28%	24%
Base	1,184	2,000	1,066	503
Capacity	22%	22%	21%	20%
Base	1,175	1,976	1,056	493

Base: UK businesses that accessed export support; the precise base for each barrier varies, as the analysis excludes ‘not applicable’ cases.
Source: ECS (2018 to2020)

7 Use of DIT export promotion services

The Export Client Survey has been used to create a 'longitudinal pipeline', a dataset capturing all recorded service interactions between businesses accessing export promotion services and DIT.

This pipeline data contributes towards understanding the different journeys and combinations of service deliveries received by businesses, as well as for estimates to be made of the number of service types used.

This section presents data from businesses that used a DIT export promotion service between April 2018 and March 2020. It looks at the total number of different engagements that businesses have had with DIT services, the number of different types of DIT services that were used, as well as common combinations of different services used.

These findings are based on the service deliveries covered in the Export Client Survey, and therefore may exclude other types of DIT support that businesses may also have accessed. It may not reflect all of the businesses' interactions with DIT.

Number of engagements with DIT

This section looks at the number of different engagements that businesses included in the ECS sample have had with DIT. This could include a number of engagements across different services, or a number of engagements for the same service delivery.

Businesses can have varying levels of engagement with DIT services, depending on the type of service and their support needs.

Half (50%) of businesses, that are included in the ECS sample, had just one engagement with a DIT service during the 2 years that they accessed export support. By contrast, 13% had more than 5 engagements, and 5% had more than 10 engagements. The average of number of engagements over the 2 years was 3, while the median number was 2.

The number of engagements differed according to business size. The proportion that had more than five engagements rose steadily from 10% among micro-businesses to 22% among large businesses. The average number of engagements was around three for micro and small businesses, but around 5 for large businesses.

Table 7.1: Number of engagements with DIT services, as a %, among businesses that accessed export support broken down, by number of employees

Number of interactions	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
One	54	46	42	43	50
Two	18	20	19	17	18
Three	9	10	10	9	10
Four	5	6	7	6	6
Five	3	4	5	3	4
Six to ten	7	10	11	11	8
More than ten	4	4	7	11	5
Mean	2.8	3.1	3.5	4.9	3.1
Median	1.0	2.0	2.0	2.0	2.0
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support
Source: ECS Pipeline data (2018 to2020)

Number of different types of DIT services used

This section describes the *different* types of export promotion services (that are included in the ECS sample) used by businesses over the 2-year period and does not represent the number of engagements that businesses have had with a service.

Nearly 7 in 10 businesses used one type of DIT export promotion service over the 2 years that they accessed export support (69%), while almost 2 in 10 (19%) used 2 types of services and 13% used 3 types or more.

Larger businesses tended to use more types of DIT services. Whilst almost a quarter (23%) of large businesses used three or more different types of DIT services, this applied to just 9% of micro-businesses.

Table 7.2: Number of different types of DIT services used, as a %, among businesses that accessed export support broken down by number of employees

Number of different types of DIT services used	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
One	73	65	60	59	69
Two	17	21	22	18	19
Three or more	9	14	18	23	13
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support
Source: ECS Pipeline data (2018-2020)

The DIT services that were most widely used during the 2-year period 2018 to 2020 were:

- ITAs (48%)
- Posts (28%)
- Export Opportunities (18%)

- Sector Teams (16%)
- Webinars (14%).

Larger businesses were more likely to use face to face support, such as Posts, Sector Teams, ITAs and OBNI than the other types of export support. Although smaller businesses were more likely to use ITAs.

Some services were more likely to be used by larger businesses such as Sector Teams, Posts, Webinars, Missions and OMIS. This was especially the case with Sector Teams, with 12% of micro-businesses using the service compared with 40% of large businesses. However, ITAs, TAP and Find a Buyer were more likely to be used by smaller businesses, while there was no clear difference in the use of Export Opportunities or OBNI.

Table 7.3: Use of individual DIT services, as a %, among businesses that accessed export support broken down by number of employees

Individual DIT services	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
ITAs	50	51	44	33	48
Posts	21	31	37	46	28
Export Opportunities	18	17	20	17	18
Sector Teams	12	17	24	40	16
Webinars	13	12	15	23	14
OBNI	8	8	8	8	8
Missions	6	8	11	16	8
Find a Buyer	8	7	7	3	7
OMIS	3	7	10	11	6
Tradeshow Access Programme (TAP)	7	7	5	1	6
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support
Source: ECS Pipeline data (2018 to2020)

Combinations of services - digital and non-digital

The pipeline dataset also allows analysis to be conducted to identify common combinations of services accessed by businesses that accessed export promotion services. This section initially looks at combinations of digital and non-digital services accessed.

Around two-thirds of businesses (irrespective of size) were more likely to access non-digital services only (66%) (ITAs, TAP, Missions, OBNI, OMIS, Posts and Sector Teams). They were less likely to access only digital products (18%) (Business Profiles, Export Opportunities, Selling Online Overseas and Webinars) or both digital and non-digital products (18%).

Medium and larger businesses were slightly more likely to access both digital and non-digital services compared with micro or small businesses.

Table 7.4: Proportion of businesses that accessed digital only services, non-digital only services or both

Type of service accessed	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total
Digital only	21	14	16	15	18
Non-digital only	66	70	63	62	66
Both digital and non-digital	13	16	22	22	16
Base	4,983	2,636	1,300	644	9,868

Base: UK businesses that accessed export support
Source: ECS Pipeline data (2018 to2020)

Combinations of services

This section looks at common combinations of different export promotion services accessed.

The likelihood of a business accessing a certain service varied depending on which other services they had accessed over the 2-year period. Three services in particular had a relatively strong relationship with a range of other services. These services were:

- ITAs – 25% of businesses that had accessed TAP also having accessed ITAs and 50% of businesses that have accessed OBNI having also accessed ITAs
- Posts – just under one in 5 (19%) of businesses that had accessed TAP also accessed Posts and just under two-thirds (65%) of businesses that had accessed Posts also accessed OMIS
- Export Opportunities –7% of businesses that had accessed TAP also accessed Export Opportunities and just under 2 in 5 (38%) of businesses that accessed Export Opportunities also accessed Business Profiles

Table 7.5: Probability of accessing different combinations of services, overall

	Webinars	ITAs	OBNI	OMIS	Posts	TAP	Ex Opps	Business Profiles	Sector Teams
Webinars		10	16	16	12	6	11	12	12
ITAs	36		50	43	37	25	31	33	26
OBNI	9	8		10	10	5	9	10	7
OMIS	7	5	7		13	3	6	5	11
Posts	24	21	35	65		19	28	26	35
TAP	3	3	4	3	4		2	3	4
Ex Opps	14	11	20	19	18	7		38	13
Business Profiles	6	5	9	7	7	3	15		4
Sector Teams	15	9	14	32	21	12	12	8	

Base: UK businesses that accessed export support (9,868)
Source: ECS Pipeline data (2018 to2020)

The top 5 combinations of services that businesses accessed over the 2-year period were:

- two-thirds of businesses that accessed OMIS, also accessed Posts (65%)
- half of businesses that accessed OBNI, also accessed ITAs (50%)
- just over 2 in 5 businesses that accessed OMIS also accessed ITAs (43%)
- just under 2 in 5 of businesses that accessed Business Profiles, also accessed Export Opportunities (38%)
- just under two-fifths of businesses that accessed Posts, also accessed ITAs (37%)

These combinations are not surprising owing to the operating model of export promotion services and the types of services available throughout a business's exporting journey.

There were also some large differences in the proportion of businesses who accessed combinations of services depending on business size. The following examples have been selected because there was a relatively greater difference between the proportion of smaller and larger business who accessed combinations of services. Please see Appendix C for all combinations of services, by business size.

Table 7.6 below looks at businesses that have used Webinars, ITAs, OBNI, Export Opportunities or Sector Teams and the proportion that had also used Posts, showing the variation by business size. It shows, for example, that among businesses that had used OBNI, 27% of micro-businesses had also used Posts, increasing to 69% of large businesses. There was a similar trend by size for large businesses that have accessed Webinars, ITAs, Export Opportunities, and Sector teams, being much more likely to have also accessed Posts compared with micro-businesses.

Table 7.6: Probability of accessing Posts if business had accessed Webinars, ITAs, OBNI, OMIS, Export Opportunities or Sector Teams, by business size

Type of DIT service, as a %	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total	Base (n)
Webinars	15	30	28	41	24	1,516
ITAs	16	23	32	46	21	5,676
OBNI	27	35	44	69	35	960
Export Opportunities	20	34	39	55	28	1,902
Sector Teams	24	37	42	49	35	1,560

Base: All businesses that used Webinars (1,516), ITAs (5,676), OBNI (960), OMIS (657), Export Opportunities (1,902) or Sector Teams (1,560)
Source: ECS Pipeline data (2018 to2020)

Table 7.7 looks at businesses that have used OBNI, OMIS, Export Opportunity and Sector Teams and the proportion that had also used Webinars. If a business had accessed OMIS, there was a 7% probability of them also accessing Webinars if they were a micro-business, going up to 39% if they were a large business. There was a similar trend by size for large businesses that have accessed OBNI, Export Opportunities, and Sector teams being more likely to have also accessed Webinars than smaller businesses.

Table 7.7: Probability of accessing Webinars if business had accessed OBNI, OMIS, Export Opportunities or Sector Teams, by business size

Type of DIT service, as a %	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total	Base (n)
OBNI	7	18	20	35	16	960
OMIS	7	13	19	39	16	657
Export Opportunities	10	12	10	24	11	1,902
Sector Teams	7	10	13	23	12	1,560

Base: All businesses that used OBNI (960), OMIS (657), Export Opportunities (1,902) or Sector Teams (1,560)
Source: ECS Pipeline data (2018 t2020)

Table 7.8 looks at businesses that have used Webinars, ITAs, OBNI, OMIS, Posts and Export Opportunities and the proportion that had also used Sector Teams. If a business had accessed OMIS, there was a 19% probability of them also accessing Sector Teams if they were a micro-business, rising to 59% if they were a large business. There was a similar trend by size for large businesses that have accessed Webinars, ITAs, OBNI, Posts and Export Opportunities being more likely to have also accessed Sector Teams than smaller businesses.

Table 7.8: Probability of accessing Sector Teams if business had accessed Webinars, ITAs, OBNI, OMIS, Posts or Export Opportunities, by business size

Type of DIT service, as a %	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Total	Base (n)
Webinars	7	14	21	39	15	1,516
ITAs	5	10	18	28	9	5,676
OBNI	8	12	25	40	14	960
OMIS	19	26	43	59	32	657
Posts	13	20	27	42	21	3,049
Export Opportunities	7	12	19	40	12	1,902

Base: All businesses that used Webinars (1,516), ITAs (5,676), OBNI (960), OMIS (657), Posts (3,049) or Export Opportunities (1,902)
Source: ECS Pipeline data (2018 to2020)

Appendix A: Creating the combined ECS dataset

Separate datasets from the 2018/19 and the 2019/20 ECS Quality Survey were combined to create one single dataset. This was done to increase the total sample size for the analysis and so that analysis could be conducted by key sub-groups, mainly the business size by the number of employees.

As 2 years of data were combined, it was possible for the same business to appear in the dataset more than once, therefore a deduplication process was carried out. Where a business appeared in the combined dataset more than once, the most recently completed interview was kept.

Data were re-weighted to be representative of the 2-year period. In total, the analysis covers 9,868 businesses that used DIT export support services between April 2018 and March 2020.

There were 6 companies that were identified as having been interviewed twice in the same month as part of the ECS. In these cases, each interview was kept in the dataset, and each allocated a half weight (so that the business was only counted once).

Appendix B: Annex tables

Table A.1 Number of employees

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
0	29%	0%	0%	0%	15%
1 to 9	71%	0%	0%	0%	36%
10 to 19	0%	47%	0%	0%	12%
20 to 49	0%	53%	0%	0%	14%
50 to 99	0%	0%	57%	0%	7%
100 to 249	0%	0%	43%	0%	5%
250 to 499	0%	0%	0%	39%	3%
500 to 999	0%	0%	0%	26%	2%
1,000 or more	0%	0%	0%	35%	2%
Don't know	0%	0%	0%	0%	3%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
0	35%	2%	15%
1 to 9	57%	24%	36%
10 to 19	4%	18%	12%
20 to 49	2%	23%	14%
50 to 99	0%	12%	7%
100 to 249	0%	9%	5%
250 to 499	0%	4%	3%
500 to 999	0%	3%	2%
1,000 or more	0%	4%	2%
Don't know	0%	1%	3%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.2 Turnover

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
Up to £83,000	29%	3%	1%	0%	16%
Over £83,000 but not more than £500,000	36%	6%	1%	1%	21%
Over £500,000 but not more than £1,999,999	18%	28%	5%	1%	18%
Over £2 million but not more than £4,999,999	4%	30%	12%	3%	12%
Over £5 million but not more than £9,999,999	1%	11%	21%	3%	6%
Over £10 million but not more than £49,999,999	1%	7%	39%	21%	8%
Over £50 million	0%	1%	6%	51%	5%
Don't know	7%	9%	11%	14%	9%
Refused	4%	6%	5%	5%	6%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
Up to £83,000	43%	0%	16%
Over £83,000 but not more than £500,000	57%	0%	21%
Over £500,000 but not more than £1,999,999	0%	36%	18%
Over £2 million but not more than £4,999,999	0%	24%	12%
Over £5 million but not more than £9,999,999	0%	13%	6%
Over £10 million but not more than £49,999,999	0%	18%	8%
Over £50 million	0%	9%	5%
Don't know	0%	0%	9%
Refused	0%	0%	6%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.3 Industry sector

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,018	2,106	1,081	532	7,982
Weighted base size	4,032	2,052	1,029	519	7,872
Agriculture, forestry or fishing	3%	2%	2%	3%	2%
Mining and quarrying	0%	1%	0%	1%	0%
Electricity, gas, steam and air conditioning supply	2%	3%	3%	2%	2%
Water supply, sewerage, waste management and remediation services	0%	0%	0%	0%	0%
Manufacturing	26%	42%	49%	34%	34%
Construction	3%	4%	5%	5%	4%
Wholesale and retail trade	21%	14%	10%	9%	17%
Hotels and restaurants	3%	2%	1%	2%	3%
Transportation and storage	1%	1%	2%	2%	1%
Information and communication	1%	2%	1%	2%	2%
Finance and insurance	2%	2%	4%	5%	3%
Real estate activities	0%	0%	0%	0%	0%
Professional, scientific and technical activities	3%	2%	3%	3%	3%
Administrative and support service activities	1%	1%	0%	1%	1%
Education	7%	5%	5%	13%	6%
Health and social work	7%	5%	4%	5%	6%
Public administration and defence	3%	3%	4%	6%	3%
Arts, Entertainment and Recreation	10%	6%	3%	4%	8%
Other	5%	4%	3%	3%	4%
Don’t know	0%	0%	0%	0%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	2,857	3,983	7,982
Weighted base size	2,864	3,895	7,872
Agriculture, forestry or fishing	2%	2%	2%
Mining and quarrying	0%	0%	0%
Electricity, gas, steam and air conditioning supply	1%	3%	2%
Water supply, sewerage, waste management and remediation services	0%	0%	0%
Manufacturing	26%	40%	34%
Construction	3%	5%	4%
Wholesale and retail trade	21%	15%	17%
Hotels and restaurants	3%	2%	3%
Transportation and storage	1%	2%	1%
Information and communication	2%	2%	2%
Finance and insurance	2%	3%	3%
Real estate activities	0%	0%	0%
Professional, scientific and technical activities	3%	3%	3%
Administrative and support service activities	1%	1%	1%
Education	8%	5%	6%
Health and social work	7%	5%	6%
Public administration and defence	3%	4%	3%
Arts, Entertainment and Recreation	11%	5%	8%
Other	4%	4%	4%
Don’t know	0%	0%	1%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.4 Length of time the business has been trading

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
Less than 6 months	4%	0%	0%	0%	2%
More than 6 months, up to a year	7%	1%	0%	0%	4%
More than 1, up to 2 years	10%	3%	1%	0%	6%
More than 2, up to 3 years	10%	3%	1%	0%	6%
More than 3, up to 4 years	8%	3%	0%	0%	5%
More than 4, up to 5 years	9%	4%	1%	1%	6%
More than 5, up to 10 years	21%	16%	7%	4%	17%
More than 10 years	30%	69%	89%	94%	53%
Don't know	1%	1%	0%	0%	2%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
Less than 6 months	3%	0%	2%
More than 6 months, up to a year	8%	1%	4%
More than 1, up to 2 years	12%	2%	6%
More than 2, up to 3 years	12%	3%	6%
More than 3, up to 4 years	9%	3%	5%
More than 4, up to 5 years	9%	4%	6%
More than 5, up to 10 years	21%	15%	17%
More than 10 years	26%	73%	53%
Don't know	1%	0%	2%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.5 UK region

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
North East	5%	3%	4%	3%	4%
North West	10%	10%	11%	9%	10%
Yorkshire and The Humber	7%	8%	9%	7%	8%
East Midlands	6%	6%	8%	6%	6%
West Midlands	8%	8%	10%	9%	8%
East of England	9%	11%	9%	8%	9%
London	24%	20%	15%	20%	22%
South East	16%	16%	15%	12%	16%
South West	7%	8%	7%	7%	7%
Wales	1%	2%	2%	2%	2%
Scotland	3%	4%	5%	9%	4%
Northern Ireland	1%	1%	1%	2%	1%
Missing	3%	2%	3%	7%	3%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
North East	5%	3%	4%
North West	10%	10%	10%
Yorkshire and The Humber	7%	8%	8%
East Midlands	6%	6%	6%
West Midlands	7%	9%	8%
East of England	8%	10%	9%
London	24%	19%	22%
South East	16%	16%	16%
South West	8%	8%	7%
Wales	1%	2%	2%
Scotland	3%	5%	4%
Northern Ireland	1%	1%	1%
Missing	3%	2%	3%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.6 Future plans

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
Increase turnover based on UK sales	88%	89%	90%	84%	88%
Increase turnover based on exporting activity	91%	92%	92%	82%	90%
Make capital investment (in premises, machinery etc.)	51%	60%	68%	59%	56%
Develop and launch new products/services	83%	81%	83%	78%	82%
Make additional investment in R&D	68%	74%	74%	66%	69%
Start exporting	3%	2%	1%	1%	2%
None of these	2%	2%	1%	4%	2%
Don't know	0%	1%	1%	1%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
Increase turnover based on UK sales	89%	90%	88%
Increase turnover based on exporting activity	91%	93%	90%
Make capital investment (in premises, machinery etc.)	51%	64%	56%
Develop and launch new products/services	84%	83%	82%
Make additional investment in R&D	68%	74%	69%
Start exporting	4%	1%	2%
None of these	2%	1%	2%
Don't know	0%	0%	1%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.7 Export status

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
Sustain	71%	87%	92%	89%	79%
Reassure	4%	2%	2%	1%	3%
Promote	25%	10%	6%	9%	18%
Not known	0%	0%	0%	1%	0%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
Sustain	68%	89%	79%
Reassure	4%	2%	3%
Promote	28%	9%	18%
Not known	0%	0%	0%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.8 Export regions

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	3,734	2,379	1,224	587	8,179
Weighted base size	3,773	2,312	1,183	568	8,093
Europe	80%	91%	92%	91%	86%
- Within the European Union (for example, Germany, France, Austria, Greece)	76%	88%	89%	89%	82%
- Any other Western European countries (including Norway, Iceland, Switzerland)	42%	58%	62%	64%	51%
- Any other Eastern European countries (including Russia)	24%	39%	46%	46%	33%
- Don't know	1%	0%	1%	1%	1%
North America	51%	60%	65%	69%	57%
South America	20%	33%	38%	47%	29%
Africa	29%	40%	48%	57%	37%
The Middle East	41%	59%	66%	70%	52%
Asia (including Australia and New Zealand)	54%	68%	75%	80%	63%
None of these	3%	1%	1%	2%	2%
Don’t know	0%	0%	0%	0%	0%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	2,554	4,460	8,179
Weighted base size	2,591	4,353	8,093
Europe	78%	90%	86%
- Within the European Union (for example, Germany, France, Austria, Greece)	75%	87%	82%
- Any other Western European countries (including Norway, Iceland, Switzerland)	39%	57%	51%
- Any other Eastern European countries (including Russia)	22%	38%	33%
- Don't know	0%	0%	1%
North America	51%	60%	57%
South America	19%	32%	29%
Africa	27%	42%	37%
The Middle East	38%	60%	52%
Asia (including Australia and New Zealand)	54%	68%	63%
None of these	3%	1%	2%
Don’t know	0%	0%	0%

Base: UK exporters that accessed export support
Source: ECS (2018 to2020)

Table A.9 Goods and services

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	3,734	2,379	1,224	587	8,179
Weighted base size	3,773	2,312	1,183	568	8,093
Goods only	52%	55%	57%	41%	53%
Services only	35%	29%	26%	40%	32%
Both goods and services	13%	15%	16%	18%	15%
Don’t know	0%	0%	0%	1%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	2,554	4,460	8,179
Weighted base size	2,591	4,353	8,093
Goods only	49%	56%	53%
Services only	38%	28%	32%
Both goods and services	12%	15%	15%
Don’t know	1%	0%	1%

Base: UK exporters that accessed export support
Source: ECS (2018 to2020)

Table A.10 Export history

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	3,734	2,379	1,224	587	8,179
Weighted base size	3,773	2,312	1,183	568	8,093
Less than one year	7%	1%	2%	0%	4%
1 year	10%	3%	2%	1%	6%
2 years	13%	6%	3%	2%	9%
3 years	11%	5%	3%	2%	8%
4 years	8%	4%	3%	2%	6%
5 years	8%	7%	6%	4%	7%
6-10 years	19%	21%	15%	12%	19%
11-20 years	13%	23%	19%	19%	17%
More than 20 years	10%	26%	45%	56%	24%
Don't know	1%	1%	3%	2%	2%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	2,554	4,460	8,179
Weighted base size	2,591	4,353	8,093
Less than one year	7%	2%	4%
1 year	12%	3%	6%
2 years	15%	5%	9%
3 years	12%	5%	8%
4 years	8%	5%	6%
5 years	8%	7%	7%
6-10 years	18%	20%	19%
11-20 years	11%	21%	17%
More than 20 years	8%	31%	24%
Don't know	1%	1%	2%

Base: UK exporters that accessed export support
Source: ECS (2018 to2020)

Table A.11 Export to turnover proportion

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
Zero	34%	16%	10%	15%	25%
Up to 5%	8%	11%	15%	17%	10%
6 -10%	7%	9%	10%	12%	8%
11-15%	3%	5%	5%	4%	4%
16-25%	7%	10%	9%	9%	8%
26-50%	16%	20%	21%	15%	17%
51-75%	8%	13%	12%	10%	10%
76-99%	9%	11%	11%	9%	10%
100%	6%	2%	0%	1%	4%
Don’t know	1%	3%	4%	8%	3%
Refused	0%	1%	1%	2%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
Zero	38%	14%	25%
Up to 5%	8%	14%	10%
6 -10%	7%	10%	8%
11-15%	3%	5%	4%
16-25%	7%	10%	8%
26-50%	15%	21%	17%
51-75%	8%	12%	10%
76-99%	9%	11%	10%
100%	5%	3%	4%
Don’t know	0%	2%	3%
Refused	0%	0%	1%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.12 Barriers to exporting

a) Cost

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,848	2,554	1,262	598	9,543
Weighted base size	4,924	2,505	1,220	581	9,516
Strong barrier	33%	29%	30%	27%	31%
Neutral	35%	36%	39%	39%	36%
Not strong barrier	31%	33%	29%	31%	31%
Don't know	1%	2%	2%	3%	2%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,444	4,735	9,543
Weighted base size	3,508	4,646	9,516
Strong barrier	33%	29%	31%
Neutral	35%	37%	36%
Not strong barrier	30%	32%	31%
Don't know	1%	1%	2%

Base: UK businesses that accessed export support, excluding businesses that said ‘not applicable’
Source: ECS (2018 to2020)

b) Lack of knowledge

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,892	2,579	1,276	615	9,649
Weighted base size	4,964	2,532	1,236	599	9,624
Strong barrier	32%	32%	28%	24%	31%
Neutral	37%	37%	35%	37%	36%
Not strong barrier	31%	31%	36%	38%	32%
Don't know	0%	1%	1%	1%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,468	4,782	9,649
Weighted base size	3,530	4,694	9,624
Strong barrier	32%	30%	31%
Neutral	38%	36%	36%
Not strong barrier	29%	34%	32%
Don't know	0%	0%	1%

Base: UK businesses that accessed export support, excluding businesses that said 'not applicable'
Source: ECS (2018 to2020)

c) The capacity of your business to export and cater for international contracts

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,784	2,547	1,264	602	9,485
Weighted base size	4,851	2,497	1,217	588	9,447
Strong barrier	26%	22%	21%	20%	24%
Neutral	33%	30%	27%	28%	31%
Not strong barrier	40%	47%	52%	50%	44%
Don't know	1%	1%	0%	1%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,387	4,731	9,485
Weighted base size	3,444	4,636	9,447
Strong barrier	28%	22%	24%
Neutral	33%	30%	31%
Not strong barrier	39%	48%	44%
Don't know	1%	0%	1%

Base: UK businesses that accessed export support, excluding businesses that said 'not applicable'
Source: ECS (2018 to2020)

d) Access to contacts, customers and the right networks

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,896	2,585	1,276	622	9,670
Weighted base size	4,969	2,537	1,235	606	9,643
Strong barrier	45%	41%	38%	27%	42%
Neutral	32%	36%	33%	36%	34%
Not strong barrier	22%	23%	28%	36%	24%
Don't know	1%	1%	0%	1%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,467	4,787	9,670
Weighted base size	3,529	4,698	9,643
Strong barrier	45%	41%	42%
Neutral	34%	34%	34%
Not strong barrier	21%	25%	24%
Don't know	1%	0%	1%

Base: UK businesses that accessed export support, excluding businesses that said ‘not applicable’
Source: ECS (2018 to2020)

Table A.13 Number of interactions with DIT services

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
1	54%	46%	42%	43%	50%
2	18%	19%	19%	16%	18%
3	9%	10%	10%	9%	9%
4	5%	6%	7%	6%	6%
5	3%	4%	5%	3%	4%
6 to 10	7%	10%	11%	11%	8%
11 or more	4%	4%	7%	11%	5%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
1	54%	45%	50%
2	18%	19%	18%
3	9%	10%	9%
4	5%	7%	6%
5	3%	4%	4%
6 to 10	7%	10%	8%
11 or more	4%	5%	5%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.14 DIT services used

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,983	2,636	1,300	644	9,868
Weighted base size	5,070	2,594	1,258	633	9,868
Webinars	13%	12%	15%	23%	14%
ITAs	50%	51%	44%	33%	48%
OBNI	8%	8%	8%	8%	8%
OMIS	3%	7%	10%	11%	5%
Posts	21%	31%	37%	46%	28%
Tradeshow Access Programme (TAP)	7%	7%	5%	1%	6%
Missions	5%	8%	11%	16%	8%
Export Opportunities	18%	17%	19%	17%	18%
Accepted for SOO	2%	1%	0%	0%	2%
Find a Buyer	8%	7%	7%	3%	7%
Sector Teams	11%	17%	24%	40%	16%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,529	4,855	9,868
Weighted base size	3,598	4,776	9,868
Webinars	14%	12%	14%
ITAs	49%	49%	48%
OBNI	8%	8%	8%
OMIS	3%	7%	5%
Posts	21%	33%	28%
Tradeshow Access Programme (TAP)	7%	6%	6%
Missions	6%	9%	8%
Export Opportunities	18%	18%	18%
Accepted for SOO	2%	1%	2%
Business Profiles	8%	7%	7%
Sector Teams	11%	19%	16%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Table A.15 Number of DIT services used

Size of business (number of employees)	Micro (0-9 employees)	Small (0-49 employees)	Medium (50 -249 employees)	Large (250+ employees)	Total
Unweighted base size	4,977	2,634	1,300	644	9,860
Weighted base size	5,061	2,592	1,258	633	9,856
1	73%	65%	60%	59%	69%
2	17%	21%	22%	18%	19%
3	6%	8%	10%	12%	8%
4	2%	3%	5%	6%	3%
5	1%	2%	2%	3%	1%
6 or more	0%	1%	1%	2%	1%

HEP (High Potential Exporters)	Non-HEP	HEP	Total
Unweighted base size	3,523	4,854	9,860
Weighted base size	3,589	4,774	9,856
1	73%	65%	69%
2	17%	20%	19%
3	7%	9%	8%
4	2%	4%	3%
5	1%	2%	1%
6 or more	0%	1%	1%

Base: UK businesses that accessed export support
Source: ECS (2018 to2020)

Appendix C: Annex tables

Table A.16: Probability of accessing different combinations of services, micro businesses only

	Webinars	ITAs	OBNI	OMIS	Posts	TAP	Ex Opps	Business Profiles	Sector Teams
Webinars		9	12	7	9	4	10	11	7
ITAs	37		46	34	37	23	27	27	23
OBNI	8	7		6	10	5	9	8	5
OMIS	2	2	2		9	1	2	2	5
Posts	15	16	27	69		14	20	18	24
TAP	2	3	4	2	4		1	2	4
Ex Opps	14	10	20	14	17	4		36	10
Business Profiles	7	4	8	4	7	2	15		4
Sector Teams	7	5	8	19	13	7	7	5	

%: 100, 90, 80, 70, 60, 50, 40, 30, 20, 10, 0

Base: Micro (0-9 employees) UK businesses that accessed export support (4,983)
Source: ECS Pipeline data (2018 to2020)

Table A.17: Probability of accessing different combinations of services, small businesses only

	Webinars	ITAs	OBNI	OMIS	Posts	TAP	Ex Opps	Business Profiles	Sector Teams
Webinars		10	18	13	12	6	12	14	10
ITAs	42		54	45	38	28	32	39	30
OBNI	12	9		11	9	6	9	12	6
OMIS	8	6	9		13	3	9	9	11
Posts	30	23	35	61		21	34	33	37
TAP	3	4	5	3	5		3	3	6
Ex Opps	17	10	19	22	18	8		43	12
Business Profiles	8	5	10	9	7	3	18		4
Sector Teams	14	10	12	26	20	15	12	9	

% (colour scale: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100)

Base: Small (10 to 49 employees) UK businesses that accessed export support (2,636)
Source: ECS Pipeline data (2018 to2020)

Table A.18: Probability of accessing different combinations of services, medium businesses only

	Webinars	ITAs	OBNI	OMIS	Posts	TAP	Ex Opps	Business Profiles	Sector Teams
Webinars		12	20	19	11	10	10	7	13
ITAs	36		56	50	38	32	38	41	33
OBNI	11	10		9	10	5	8	12	9
OMIS	13	11	11		16	13	9	10	18
Posts	28	32	44	59		34	39	35	42
TAP	4	4	3	7	5		4	6	4
Ex Opps	12	17	20	18	20	16		36	16
Business Profiles	3	7	10	7	7	8	13		4
Sector Teams	21	18	25	43	27	20	19	13	

Base: Medium (50 to 249 employees) UK businesses that accessed export support (1,300)
Source: ECS Pipeline data (2018 to2020)

Table A.19: Probability of accessing different combinations of services, large businesses only

	Webinars	ITAs	OBNI	OMIS	Posts	TAP	Ex Opps	Business Profiles	Sector Teams
Webinars		18	35	39	20	0	24	0	23
ITAs	26		48	44	32	0	43	0	23
OBNI	12	12		17	12	0	14	0	8
OMIS	18	14	22		18	0	15	0	16
Posts	41	46	69	79		0	55	0	49
TAP	1	1	2	1	1		1	0	1
Ex Opps	18	22	31	23	20	0		0	17
Business Profiles	3	5	1	5	4	0	7		3
Sector Teams	39	28	40	59	42	0	40	0	

% (colour scale): 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100

Base: Large (250+ employees) UK businesses that accessed export support (644)
Source: ECS Pipeline data (2018 to2020)

Department for International Trade

Analysis

The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. We are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as developing an outward looking trade diplomacy strategy.

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