Export client reported impact survey for businesses supported April 2018 to March 2019

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

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Contents

1. Introduction

1.1. Background and objectives

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.

The Export Strategy 2018[1] is based on:

- Supporting and encouraging UK businesses to drive sustainable international growth by:
  - Encouraging and inspiring businesses that can export but have not started or are just beginning.
  - Informing businesses by providing information, advice and practical assistance. finance they need to export from the private or public sector
  - Connecting UK businesses with overseas buyers, international markets and peer-to-peer support.
  - Raising awareness of how UK Export Finance's trade and export finance and insurance products can increase global competitiveness of exporters.
- Opening markets, building a trade framework with new and existing partners which is free and fair.

Until 2017, the Performance & Impact Monitoring Survey (PIMS) was used to collect data regarding the quality and impact of DIT's **exporting** services. PIMS was also used to estimate two key performance indicators (KPIs): (i) the number of service deliveries provided, and (ii) the number of unique businesses supported by DIT.

A review of PIMS[2] by DIT identified several challenges and areas of improvement for the study. DIT commissioned Kantar Public and Frontier Economics to design and conduct a new study to examine the quality and impact of its export services: The Export Client Survey (ECS). The main aims of the ECS are:

- To track the number of Service Deliveries and Individual Businesses supported by DIT;
- To track client perceptions of quality of support and advice provided by DIT;
- To provide a measure of reported impact on business of DIT's services;
- Understand what drives performance and how services can be improved over time.

Additionally, the ECS will be used to create a 'longitudinal pipeline' – a new central dataset capturing all recorded service interactions between beneficiary companies and DIT.

The ECS forms a key component of the export promotion Monitoring and Evaluation Framework.

The ECS comprises two linked surveys: a Quality Survey and a Reported Impact Survey (RIS). Interviewing for the Quality Survey began in January 2018 (contacting businesses that had an interaction with DIT in October 2017). The RIS interviews Quality Survey respondents that agreed to recontact for research purposes 12 months after the specified interaction with DIT and began interviewing in October 2018.

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[1] Export Strategy 2018
[2] PIMS Review, Insight and Performance Team ITI November 2016

This report presents findings from the RIS; this is a telephone survey covering the reported impact of using DIT services. The survey covers measures such as reported impact on innovation, R&D, employment levels, knowledge and confidence of exporting, additional contracts and turnover as a result of using DIT services.

The findings in this report are based on interviewing businesses who used DIT services between April 2018 and March 2019. Interviewing for this report was conducted between April 2019 and March 2020 (inclusive).

1.2. Report coverage

The client survey tracks the quality and reported impact of DIT export promotion services through monthly surveys. To produce valid and reliable estimates it is necessary to have access to a representative sample of the entire record of DIT-business interactions. To date, the survey has interviewed users of the services shown in Table 1.1.

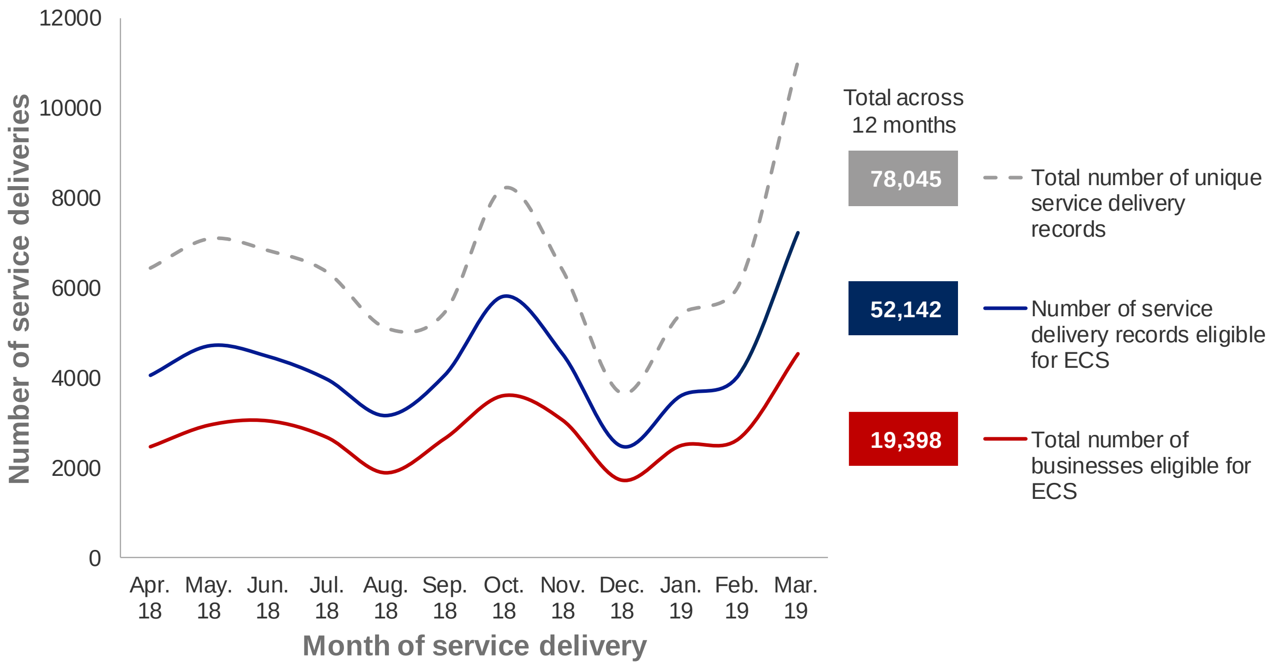
Table 1.2.1: Services covered in the survey

Bespoke offers and face to face support
Tradeshow Access Program (TAP)
International Trade Advisers (ITAs)
Missions
Overseas Business Network Initiative (OBNI)
Overseas Market Introduction Service (OMIS) (great.gov.uk)
Posts
Sector Teams
Universal Offer Digital and Events
Webinars
Export Opportunities
Business Profiles (previously called Find a Buyer)
Selling Online Overseas (SOO)

1.3. Overview of number of services delivered and businesses supported

In total we received almost 80,000 records, covering just over 50,000 service deliveries related to the services covered by the ECS for services delivered between April 2018 and March 2019. From these records, almost 20,000 businesses were supported through all the services covered by the ECS between this period. This includes the services that are not covered in depth in this report due to incomplete sample data being available. The lower number of services delivered (and businesses supported) in December is consistent with a seasonal trend of service deliveries seen in previous years.

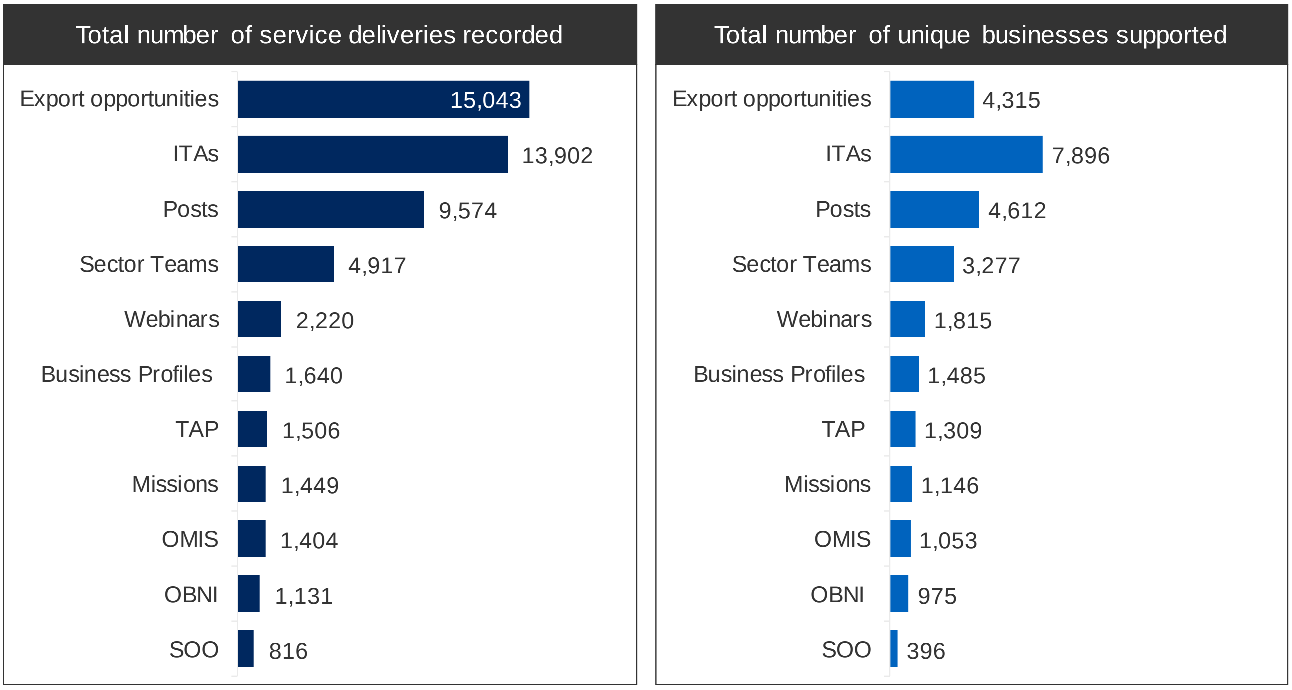
Chart 1.3.1 Service delivery records received from DIT (April 2018 - March 2019)



The most frequently used services were Export Opportunities (c.15,000 records across just over 4,000 businesses) and ITAs (c.14,000 records across c. 8,000 businesses)[3].

[3] This report is based on the data available from DIT's datahub and therefore there may be some under-reporting of some service deliveries. Any possible under-representation is not accounted for in this report.

Chart 1.3.2 Service delivery records received from DIT (April 2018 - March 2019)[4,5]



The services covered in this report are shown in Table 1.2. Some services (those where there were fewer than 100 completed interviews) have not been provided with a product findings chapter in this report due to low sample sizes that would lead to issues around the accuracy, high confidence intervals and confidentially of results.

Table 1.3.1: Services covered in this report

Bespoke offers and face to face support
Tradeshow Access Program (TAP)
International Trade Advisers (ITAs)
Sector Teams
Universal Offer Digital and Events
Export Opportunities
Business Profiles (previously called Find a Buyer)
Webinars

[4] ITAs stands for 'International Trade Advisors'. TAP stands for 'Tradeshow Access Programme'. OMIS stands for 'Overseas Market Introduction Service'. OBNI standard for 'Overseas Business Network Initiative'. SOO stands for 'Selling Online Overseas'.

[5] The sum of each bar chart does not sum to the total number of unique businesses supported as businesses are able to use more than one service delivery in a given year.

2. Methodology

2.1. Sample Design

The Export Clients Survey involves two different surveys. First, there is the Quality Survey (section 2.1.1) which is conducted approximately three months after a business has an interaction with DIT. Then all businesses that completed the Quality Survey (QS) and agreed to recontact for research purposes are included in the Reported Impact Survey (RIS) (section 2.1.2) which is conducted approximately 12 months after the business has an interaction with DIT. Below we briefly discuss the Quality Survey, and then the RIS.

2.1.1. Quality Survey

The Quality Survey is based on a monthly sample of businesses which have used a DIT exporting service each month. The sample is designed to be representative of businesses supported by DIT, permitting analysis of each service. The sample design takes into account the *longitudinal* aspect of each business's interactions with DIT products and services i.e. the varying combinations of historic service deliveries received by a business. Analysis of the survey data focuses on a businesses' specific interaction with DIT and aims to not take into account previous interactions with DIT however we are not able to fully control what wider experiences the business may draw on when responding.

There is a three-month break period between when a business interacts with DIT and when the interview is conducted. Interactions in October 2017 are included within the January 2018 sample, interactions in November 2017 are included within the February 2018 sample etc. This is part of the survey design to ensure the interaction was recent enough to be memorable.

2.1.2. Reported Impact Survey (RIS)

All businesses that completed the Quality Survey and agreed to recontact for research purposes were included in the RIS sample.

Fieldwork for the RIS survey takes place approximately nine months after the business completed the Quality Survey. In effect that means there is a twelve-month break period between when the business interacts with DIT and when the RIS interview is conducted. This gap was identified by Frontier Economics in the review of PIMS as the optimum period to wait to collect information about reported impact, while still ensuring that businesses would be able to recall the event and their businesses dealings over this time.

As the RIS is based on QS respondents who agreed to be re-contacted, the sample was checked to see if it was representative of businesses that participated in the Quality survey. Particular attention was given to see if there was a 'positivity' bias – if those who participated in the RIS were the businesses more likely to have reported that they were satisfied in their dealings with DIT (provided a rating of 7 or more out of 10 when asked in the Quality Survey question how satisfied they were with the service[6]). Table 2.1 compares the proportions of businesses that were satisfied in their dealings with the DIT product or service in the Quality Survey. The column for 'All Quality Survey respondents' presents satisfaction ratings for all who completed the Quality Survey. The

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[6] The question asked was: Using the same scale as before, Thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service?
[IF NECESSARY]: Please rate the service on a scale of 0 to 10, where 10 is very satisfied and 0 is very dissatisfied.

column for ‘All RIS respondents’ presents the Quality Survey satisfaction score for all that completed the RIS. None of the differences in the table are statistically significant (at a 95% confidence level).

Table 2.1.1: Proportions of businesses that were satisfied in their dealings with the DIT product or service in the QS and RIS

DIT Product or Service[7]	All Quality Survey respondents % satisfied	All RIS respondents % satisfied
Tradeshow Access Program (TAP)	89% [+/- 4%]	90% [+/- 5%]
International Trade Advisers (ITAs)	76% [+/- 2%]	75% [+/- 4%]
Posts	73% [+/- 4%]	78% [+/- 6%]
Sector Teams	78% [+/- 4%]	80% [+/- 6%]
Webinars	70% [+/- 6%]	73% [+/- 11%]
Export Opportunities	45% [+/- 4%]	46% [+/- 7%]

2.2. Analysis

Several questions in the survey ask respondents to give a rating using a scale from 0 to 10, where 10 was the most positive response and 0 was the least positive response. Responses have been grouped into positive (a score of seven or higher), neutral (a score of four to six), and negative (a score of three or below). Respondents could also say ‘Don’t know’ or ‘Not applicable’. Respondents who said the question did not apply to them were excluded from the analysis. Those who answered ‘Don’t know’ or ‘Refused’ are included in the charts, unless no respondents gave this answer.

Where percentages shown in charts or tables do not total to exactly 100% (or where they do not exactly total to a summary statistic given, such as agree/disagree) this is due to either rounding to the nearest whole number and/or because some questions allowed participants to choose more than one response option.

Where the results for one group of respondents are compared with the results for another group, any differences discussed in the text of this report were statistically significant at the 95% probability level, unless otherwise stated. This means that we can be 95% confident that the differences observed between the subgroups are genuine differences, and have not just occurred by chance.

Base sizes, displaying the number of people who gave a response to any question (excluding those who said that the question did not apply to them) are shown on each chart.

Data in this report, including numbers of exporting contracts won and value of these contracts is based on estimates provided by the respondents. While steps are taken during interviewing to

[7] Table excludes Selling Online Overseas as only nine businesses were asked about this product or service following a low number of interviews in the Quality Survey.

ensure that data is accurate (interviewers reading back all responses on number of contracts and value of contracts, respondents being offered the chance to provide a banded response rather than an exact numeric answer if they are unsure), caution should be taken as there is the potential for respondents to 'guess' at some answers where they do not know the precise figure.

Analysis of number of exporting contracts won (and extensions gained) and value of contracts includes averages. The average used in this report is the median. The median is the middle value in a data set, when the values are arranged in order of magnitude from smallest to largest. The median is a good measure of the average value when the data includes exceptionally high or low values.

The alternative is to use the 'mean'. However, this can be overly influenced by a small number of exceptional cases – in this context, a small proportion of businesses with an exceptionally large number of new contracts won or exceptionally large values of these contracts. This adds volatility within the dataset at one time point, and can make tracking changes over time less reliable due to the amount that these cases differ from the rest of the results. Additionally, as this is a survey and not all businesses take part, if any businesses that record exceptionally large wins in the survey one year do not participate the next then this could have a large impact on the data.

2.2.1. Quality Survey weighting

The Quality Survey is a sample of businesses that have used DIT exporting products or services.

The survey data is weighted to ensure that the achieved sample matched the population of businesses supported with respect to (i) the number of businesses supported for each individual service, and (ii) the number of businesses supported each month.

We calculated weights at two levels:

- A **company level weight**. This weight can be used for questions which are not dependent on the service the company was sampled for, for example, questions about the company itself or about its experiences of DIT services in general.
- A **service level weight**. This weight can be used for questions which relate specifically to the service for which the company was sampled.

For further information on the Quality Survey weighting, please see the accompanying Quality Survey technical report.

2.2.2. RIS weighting

The weights for the impact survey are based on the initial Quality Survey weights, with an adjustment for the likelihood of a given company that took part in the Quality Survey also taking part in the impact survey.

Therefore, the RIS weighting also has a company level weight and a service level weight as per the Quality Survey.

For further information on the RIS weighting, please see the accompanying RIS technical report.

2.3. Fieldwork

Interviews were conducted using Computer-Assisted Telephone Interviewing (CATI). All businesses in the sample were sent a letter, prior to being contacted, to let them know the purpose of the research and provide them with an opportunity to contact Kantar to ask any questions or opt out of the research. Fieldwork for the RIS began in October 2018 (interviewing businesses who received support from DIT in October 2017 and who participated in the Quality Survey in January

2018). This report covers DIT services delivered between April 2018 and March 2019. The average interview length was around 16 minutes.

2.4. Response rates

Table 2.2 below shows response rates achieved between April 2019 and March 2020. Table 2.3 breaks this down by DIT product or service. As noted in section 1.3, detailed analysis of several products or services has been excluded from this report as the base size was too low to report on with confidence. We calculated the overall response rate using the American Association for Public Opinion Research standard definitions[8], an industry standard metric for calculating response rates. As there are no ineligible cases in the RIS fieldwork (as all businesses had completed the QS and agreed to be recontacted) it is easy to calculate response as:

Interviews / (Interviews + Live sample - not interviewed + Refusal)

We achieved a 59% response rate for interviews conducted between April 2019 and March 2020[9].

Table 2.4.1 Fieldwork outcomes April 2019 to March 2020

Fieldwork outcomes	
	Number of cases *(N)*
Number of cases issued	4175
Live sample - not interviewed	791
Deadwood (uncontactable phone numbers)	301
Refusal	808
Ineligible	0
Complete interview	2275
Response rate	59%

[8] https://www.aapor.org/Standards-Ethics/Standard-Definitions-(1).aspx
[9] Based on response rate 3 calculations, which can be found here: https://www.aapor.org/Standards-Ethics/Standard-Definitions-(1).aspx. Response rates are calculated by excluding deadwood.

2.4.1. Response rates for each DIT service

Table 2.4.2 Fieldwork outcomes April 2019 to March 2020

	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector teams	Webinars	Export Opportunities	Business Profiles	Selling Online Overseas
Number of cases issued	289	1554	129	118	102	549	370	221	681	123	22
Live sample - no interview	42	271	34	20	24	126	64	47	133	22	5
Deadwood	11	96	9	10	10	49	32	22	47	12	3
Refusal	36	285	24	29	18	111	80	33	153	27	5
Complete	200	902	62	59	50	263	194	119	348	62	9
Response rate	**72%**	**62%**	**52%**	**55%**	**54%**	**53%**	**57%**	**60%**	**55%**	**56%**	**47%**

	Net: Digital services	Net: Face to face services
Number of cases issued	1,047	3,128
Live sample - no interview	207	584
Deadwood	84	217
Refusal	218	590
Complete	538	1,737
Response rate	**56%**	**60%**

3. Product Findings

This chapter presents the key findings for each of the DIT services or products covered by the survey, examining the performance of services and products in terms of benefits to businesses export capabilities, the actions businesses take to prepare themselves for exporting, and departmental metrics.

As noted in the Introduction and Methodology sections, the report only covers services or products where base sizes were sufficiently comprehensive (section 1.3). It is important to note the points in the Introduction about the representativeness of the sample for each service or product.

3.1. Tradeshow Access Programme (TAP)

The Tradeshow Access Programme (TAP) provides subsidised opportunities for UK firms to exhibit at international trade fairs. Each year DIT, with the relevant TAP trade challenge partners, agrees which overseas trade shows they will support UK businesses to attend via grants. Businesses take part as a group, led by the trade challenge partner for that trade show.

3.1.1. TAP: Quality survey summary

These findings are based on interviews with 200 businesses who used the TAP service from April 2018 to March 2019 and participated in both the Quality Survey and Reported Impact Survey.

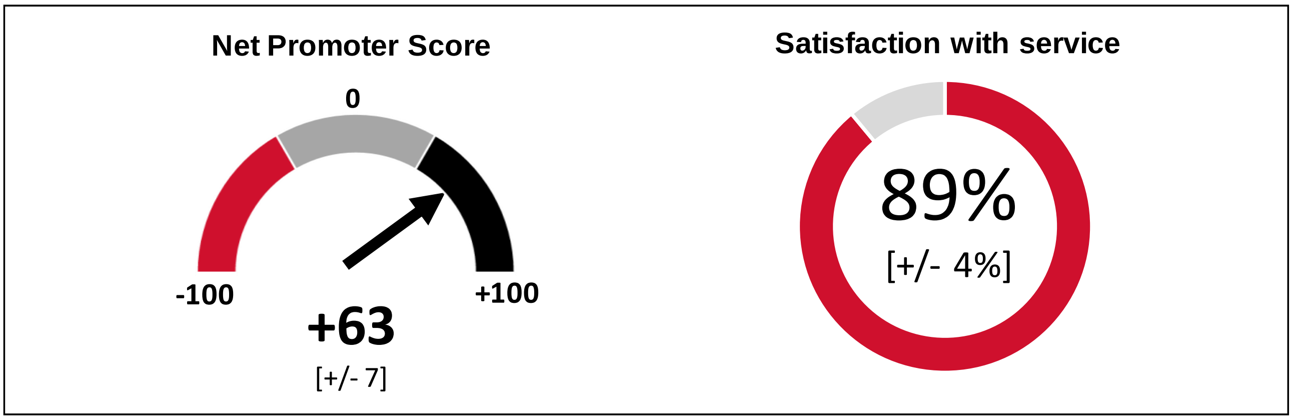
Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=369), as an overview of the businesses' experience of using the TAP service.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own[10]. Seven in ten (70%) were 'Promoters' of TAP, while seven per cent were 'Detractors' (score of 0-6) and 21% were neutral (score of 7-8). **Overall, TAP had an NPS of 63.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)[11].

Overall, nine in ten (89%) of businesses were satisfied with their experience of the TAP service (rating of 7 or more out of 10), and this included around one in three businesses (36%) who gave a 'very satisfied' rating (10 out of 10).

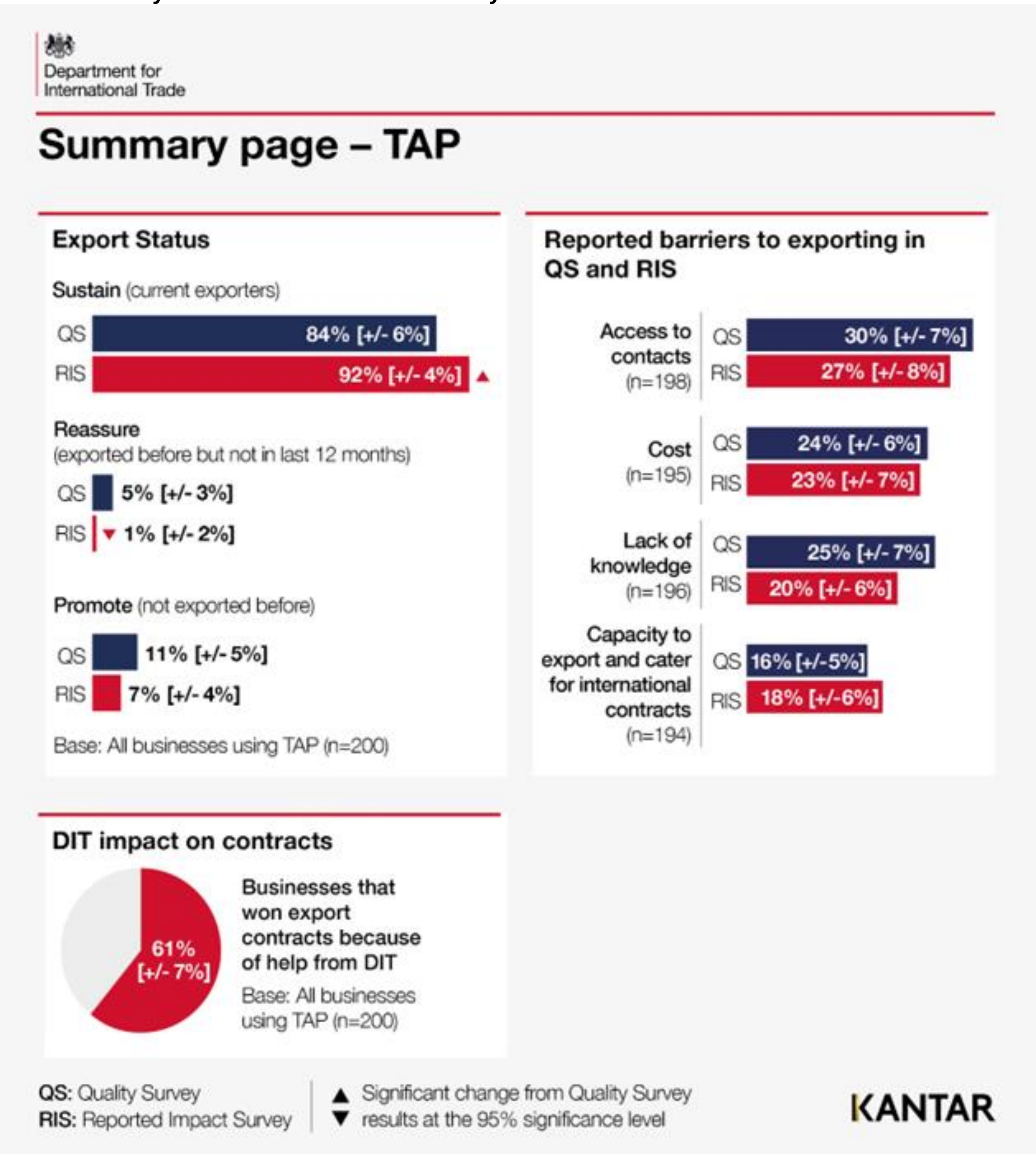
Chart 3.1.1 Net Promoter Score and Satisfaction with service from Quality Survey - TAP



[10] Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.

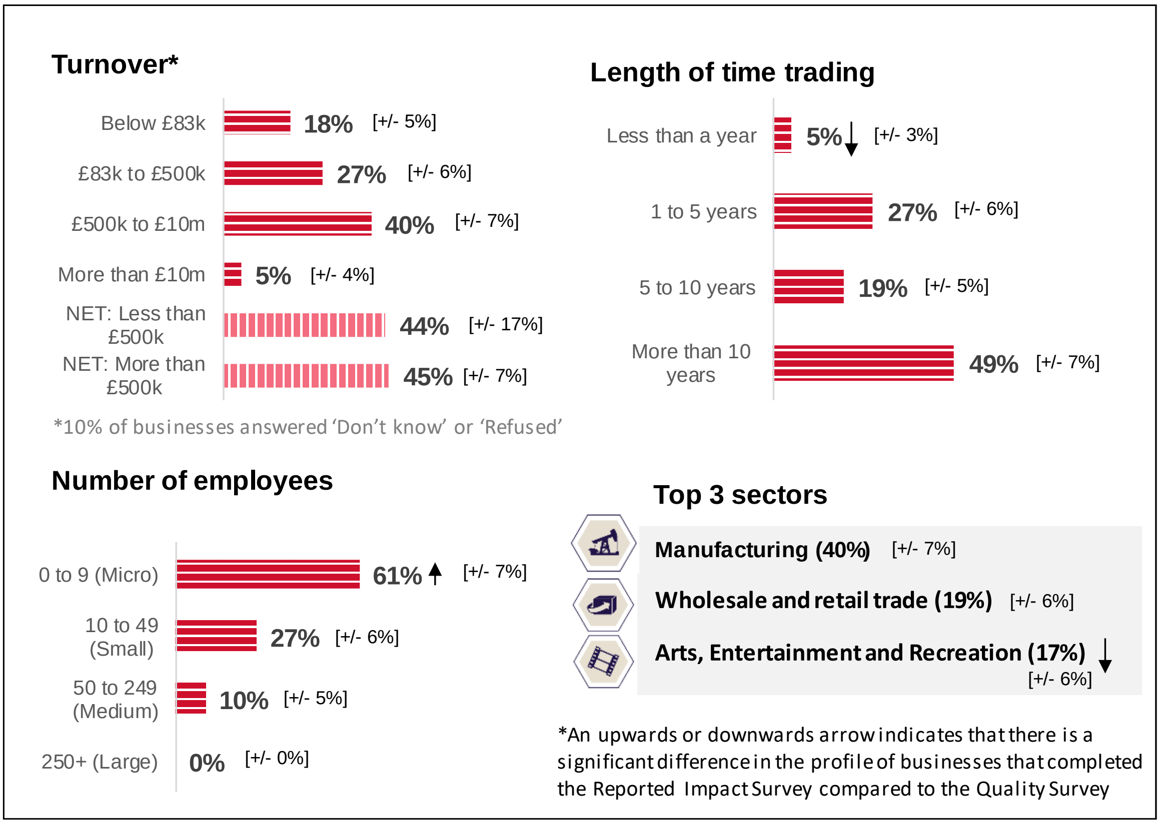
[11] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.1.2 Key indicators from the RIS survey – TAP



3.1.2. Profile of RIS survey respondents: TAP

Chart 3.1.3 Profile of RIS Survey Respondents[12] - TAP



Reported Impact on exporting

3.1.3. TAP

Businesses that used the TAP service were asked about their export status, both at the time of their interaction with the TAP service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DIT has grouped UK businesses into segments, which reflect businesses' views on their potential to export. These segments include:

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. More than eight in ten (84%) that used the TAP service fell into this segment at the time of their interaction. This increased to 92% in the RIS 12 months later.

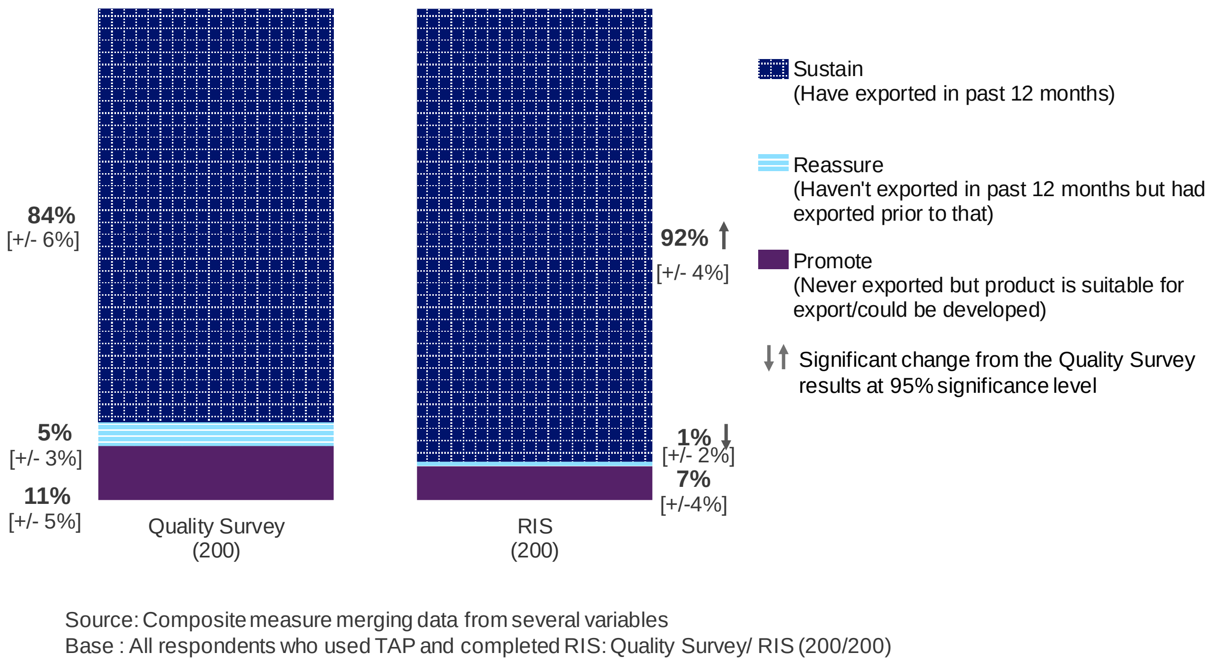
Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Five per cent that used the TAP service fell into this segment at the time of their interaction, compared with one per cent 12 months after the interaction.

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. Around one in ten (11%) that used the TAP service were in this segment at the time of

[12] Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

their interaction and seven per cent 12 months after the interaction. This change is not statistically significant.

Chart 3.1.4 Exporter status at time of interaction (Quality Survey) and 12 months later (RIS) - TAP[13]



The export status of some businesses changed between the time of interaction in the Quality Survey, and 12 months later in the RIS survey (Table 3.1.1). Seven per cent of all businesses reported that they had moved from Promote to Sustain, that is moved from having never exported, to having exported in the past 12 months.

Table 3.1.1 Change in export status at time of interaction (Quality Survey) and 12 months later (RIS) – TAP

Quality Survey Reported Export status n=200	Reported Impact Survey Reported Export Status n=200	Percentage
Sustain, 172 businesses	Sustain, n=167	**97%** [+/- 3%]
Promote, 20 businesses	Moved to Sustain, n=12	**62%** [+/- 21%]

Source: Composite measure merging data from several variables. Shaded values represent movements not logically possible so may represent respondent error. Data only includes respondents that provided details of their export status in both surveys.

[13] Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote.

3.1.4. Reported Export Contracts Achieved since receiving the service: TAP

Businesses that said they had exported in the previous 12 months were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the TAP service. They were asked to think of all contracts, not just those assisted by the TAP service or DIT.

Of the 92% of businesses that exported (185 businesses), 85% reported that they had won any new overseas business contract and/or had gained extensions to existing overseas business contracts in the year since they used the service.

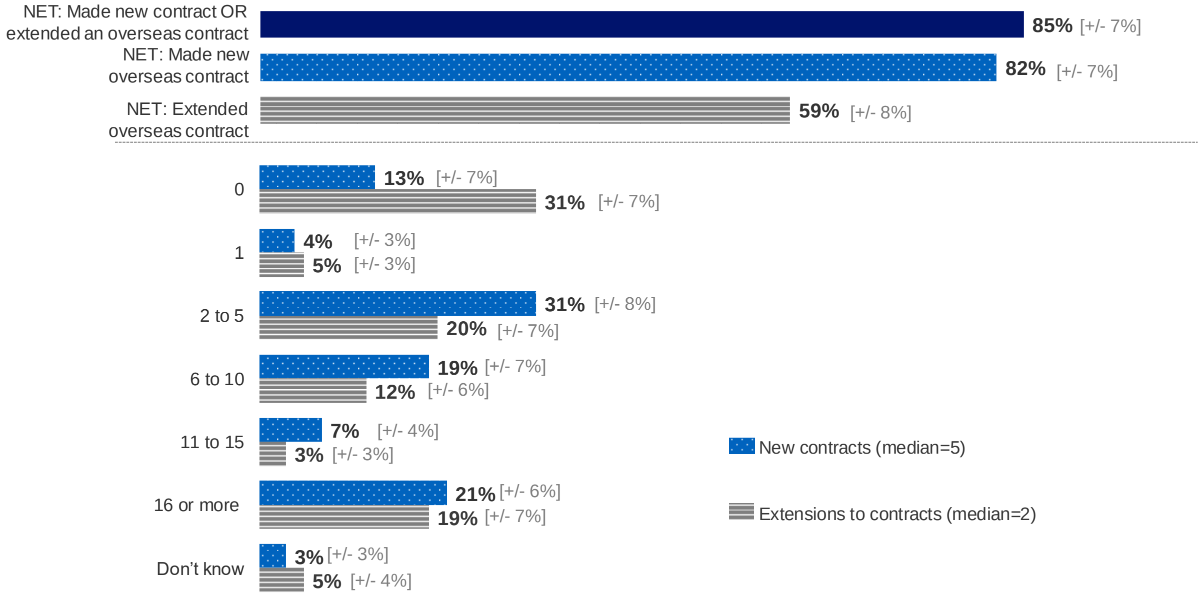
Of the 92% of businesses that exported, more than nine in ten (82%) of these exporting businesses reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.1.5). Four per cent had won one overseas contract, with one in three (31%) winning between two and five. One in five (21%) businesses had won more than fifteen overseas contracts, while ten per cent had won more than thirty contracts (Chart 3.1.5).

The median number of contracts won among exporting businesses that used the TAP service was five (this is taken from the 82% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

Around six in ten (59%) exporting businesses that used the TAP service reported they had gained extensions to existing overseas business contracts in the year since they used the service. Five per cent extended one, one in five (20%) between two and five, 12% between six and ten, and 22% extended more than ten existing overseas sales contracts. Ten per cent had extended more than 30 contracts. One in three (31%) businesses had not extended any existing contracts (Chart 3.1.5).

The median number of contracts extended (including those that did not extend any) was two.

Chart 3.1.5 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contract made in previous 12 months - TAP[14]



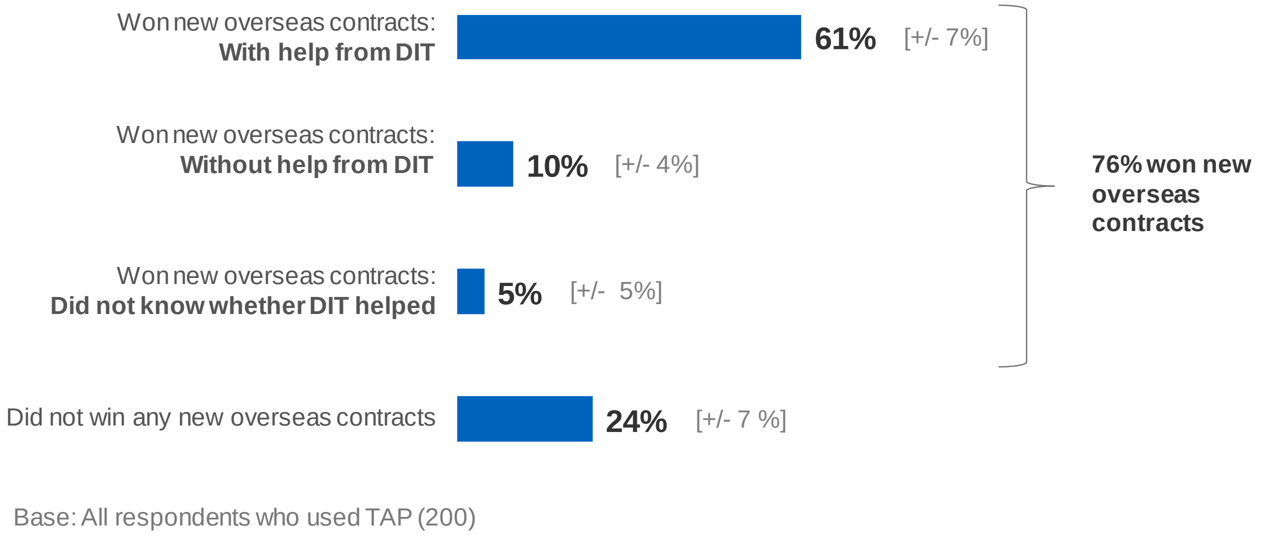
Q_Newcontract– Firstly, how many new overseas business contracts for export sales did you win in the past year?
Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
Base: All respondents who used TAP and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (185)

Reported additional contracts which were gained because of DIT support - TAP

Looking at all businesses that used TAP (including those that were not currently exporting and those that did not win any contracts or contract extensions), 61% said they won contracts with the assistance of the TAP service or DIT[15], 10% won one or more contracts without the assistance of DIT and five per cent were unsure.

[14] The total percentage of all responses for this question add up to above 100 per cent because of rounding.
[15] Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.1.6 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – TAP

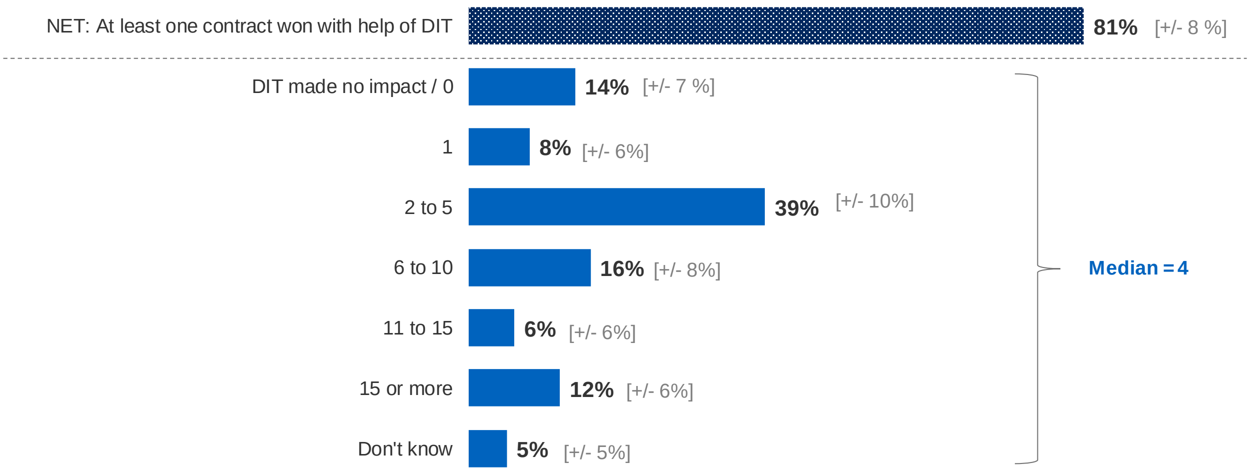


The section below **only includes results for 119 businesses, that is 60% of the businesses that were interviewed. These are businesses that both exported, won at least one new contract in the 12 months since their interaction with the TAP, *and* could estimate the number of contracts won with the assistance of the TAP service or DIT** - this includes businesses that said DIT made no impact on the number and value of new overseas business contracts they won. The remaining 40% of businesses interviewed did not meet these criteria and therefore were not asked the following questions.

The median number of contracts that DIT helped win (including those that reported 0) was four, for current exporters that used the TAP service.

Businesses who won at least one new contract were asked how many of these were won with the help of DIT in the last 12 months. As shown in Chart 3.1.7 below, about one in seven businesses (14%) said they won no new overseas sales contracts with the help of DIT, or DIT made no impact. Eight per cent had won one new overseas sales contract, and around four in ten (39%) had won between two and five. One in five (18%) won more than 10 overseas sales contracts due to DIT support.

Chart 3.1.7 Number of new overseas contracts that said to be won with the help of DIT in the last 12 months (including all those who said DIT made no impact) - TAP



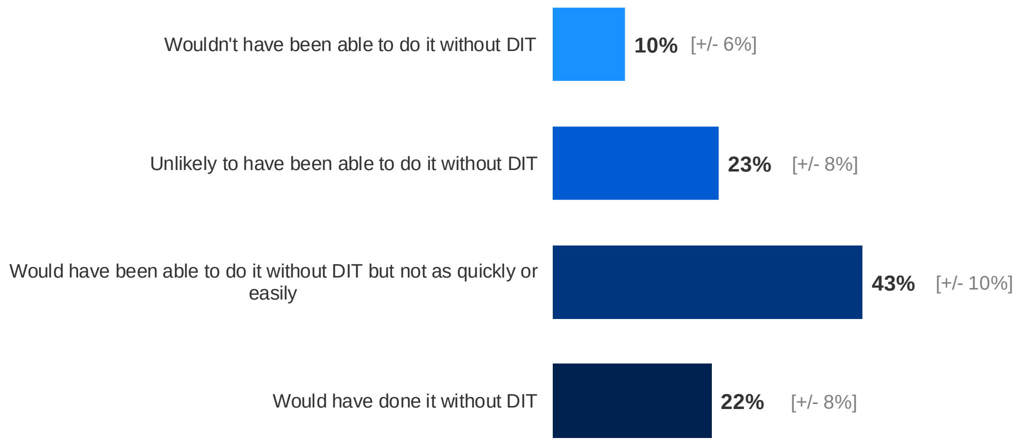
Q_ContractDIT - Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?
Q_ContractNumber–How many new overseas contracts were won with help from DIT
Base: All respondents who used TAP and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (119)

Importance of DIT's support in winning overseas contracts - TAP

The 57% of businesses that exported, won at least one new contract in the 12 months since their interaction with the TAP and could estimate the number of contracts won with the assistance of the TAP service or DIT (excluding those that answered 'don't know') were asked how important this help was. To understand the support the service provided for this analysis, **exporting businesses who said that DIT made no impact / did not help them win any new contracts were not asked this question directly but have been included in the 'would have done it without DIT' code below**.

Around three-quarters (76%) of these businesses reported that DIT was important in helping them win these contracts. Ten per cent of those who won at least one new overseas contract said they would not have been able to do it without DIT, while a quarter (23%) thought it was unlikely they could have done it without DIT. Around four in ten (43%) thought they would not have been able to do it as quickly or easily without DIT (Chart 3.1.8). Twenty-two per cent thought they would have been able to achieve the same outcome without DIT support.

Chart 3.1.8 How important DIT's help was in winning overseas contracts - TAP



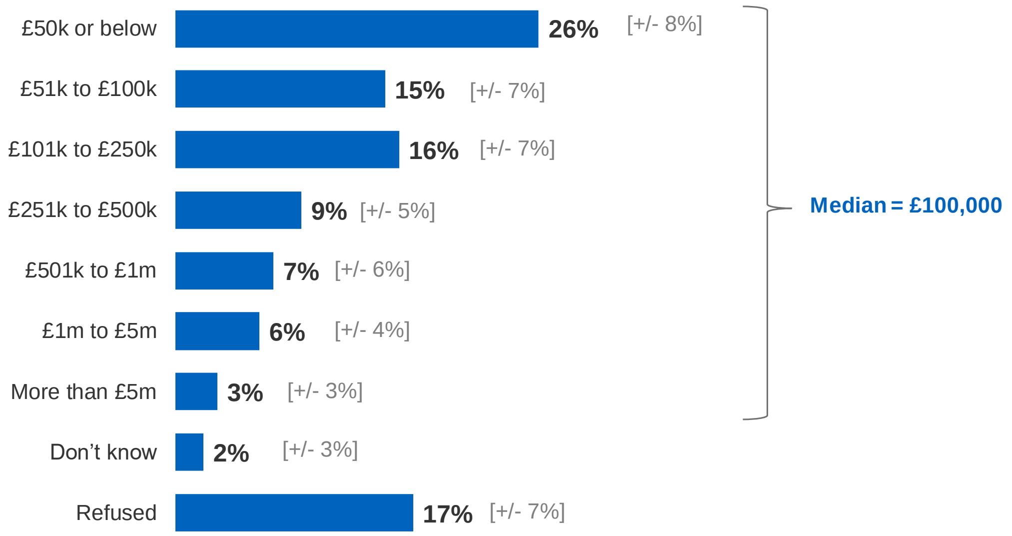
QContractHelp – How important was DIT's help in winning these overseas contracts?
Base: All TAP respondents who won any new overseas contracts in the past year (114)

3.1.5. Reported value of export sales achieved since receiving the service: TAP

Reported value of the export sales of new contracts - TAP

The 76% of businesses that reported winning any new overseas contracts (excluding extensions to existing contracts) were also asked the value of the export sales of those contracts in total (Chart 3.1.9). The median value of the export sales of all new overseas contracts for these businesses was £100,000. A quarter (26%) won contracts with export sales value of £50,000 or below. Nine per cent said that the export sales of the won new overseas contracts was worth more than £1 million.

Chart 3.1.9 Value of all new overseas contracts made in previous 12 months - TAP



QcontractValue – What is the value of all these new overseas business contracts for export sales?
Base: All respondents who used TAP and won any new overseas sales contracts (152)

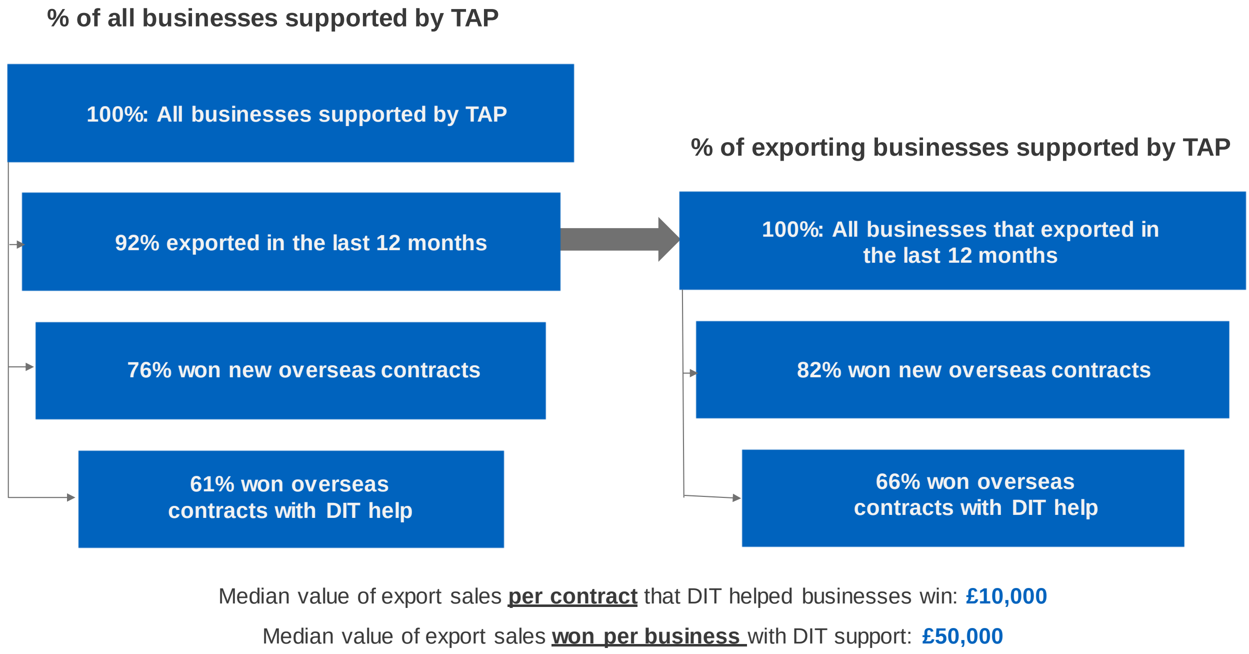
3.1.6. Summary of reported impact as a result of DIT support: TAP

This section summarises the analysis on reported additional impact which aims to estimate the additional impact that DIT services had on businesses, this impact would not have happened without DIT's support.

Looking at all businesses supported by TAP interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), more than nine in ten (92%) were exporters, meaning they were exporting at the time of service use or in the last 12 months.

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this[16].

Chart 3.1.10 Summary of businesses supported by TAP[17]



Base: All respondents who used TAP (200)

3.1.7. Exposure and growth within new markets: TAP

All businesses that used TAP were asked whether they received increased exposure or started doing business in any new markets because of their interaction with the TAP service[18]. Three in

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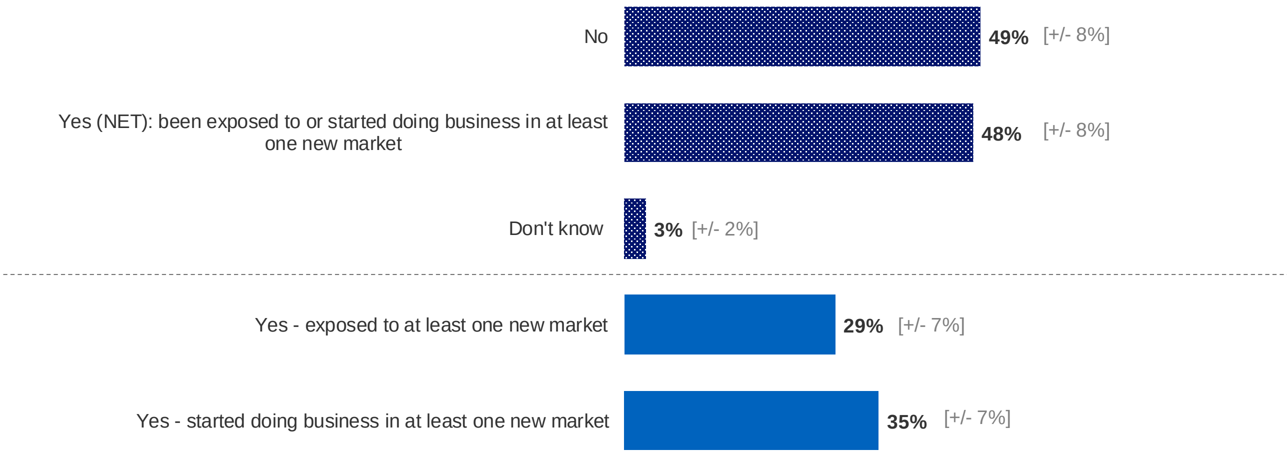
16 The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

17 In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 81% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so 81% * 76% = 61%. Find more information about how this was calculated in the technical report.

18 Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

ten (29%) had been exposed to at least one new market, and a third (35%) had started doing business in at least one new market as a result of using the TAP service.

Chart 3.1.11 Whether increased exposure or starting business in a new overseas market - TAP



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SAMPLED SERVICE]? Base: All respondents who used TAP (200)

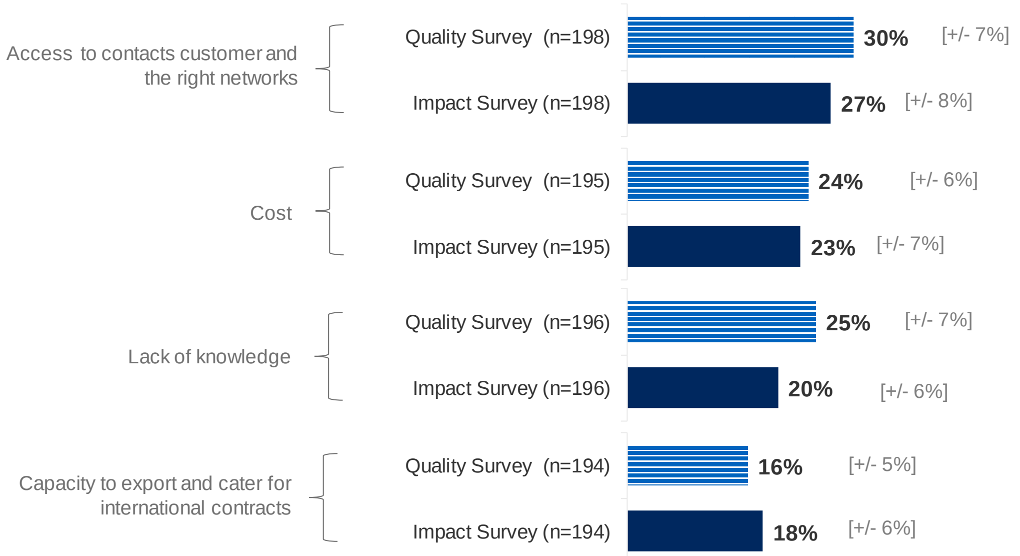
3.1.8. Barriers to exporting: TAP

Businesses were asked in both the Quality Survey and Reported Impact Survey about some **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 0 (not a barrier at all). This section compares results from between surveys for businesses who completed both surveys and provided a response to this question in both surveys[19].

There were no significant changes in the proportion of businesses that said ‘access to contacts, customers and the right networks’, ‘cost’, ‘lack of knowledge’ or ‘capacity to export and cater for international contracts’ were barriers to exporting (rating of 7 to 10 out to 10) between the Quality Survey and RIS (Chart 3.1.12).

[19] Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.1.12 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys - TAP[20]



Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used TAP except those giving a 'not applicable' answer

3.1.9. Wider benefits of service: TAP

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market using a similar rating scale as above. Businesses were more likely to have said that using the TAP service helped them gain confidence to begin exporting in a new market (42%) than that it did not help them (24%). Two in five businesses said using the TAP service helped them gain confidence to increase exporting in an existing market (41%), while just over a quarter (27%) said the service did not help in this way.

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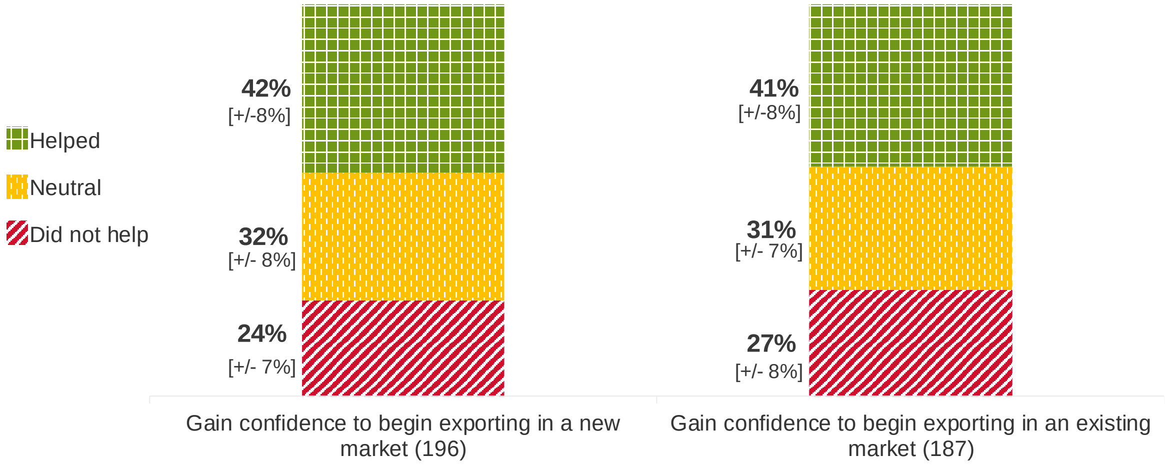
[20] The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Chart 3.1.13 To what extent experience of the service helped to build confidence in exporting - TAP

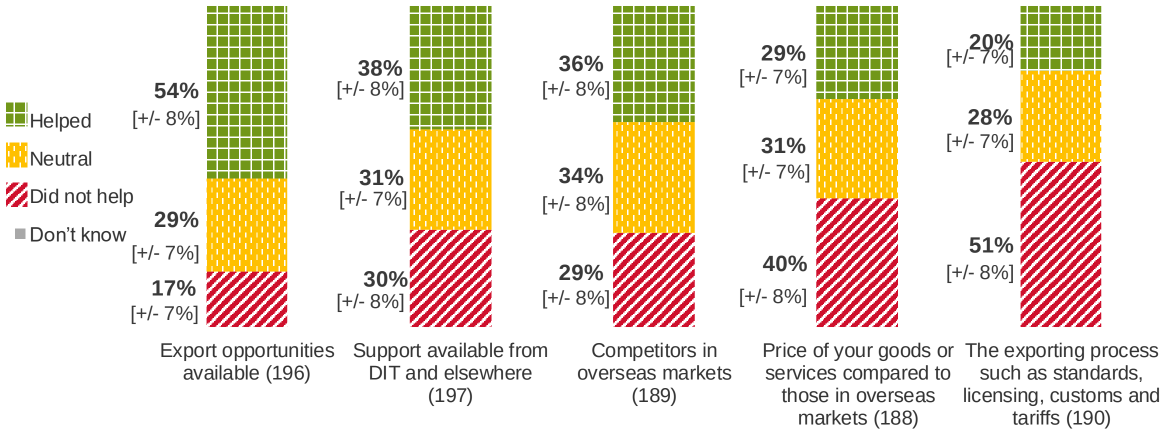


QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of [SAMPLED SERVICE] help you to…?
Base: All respondents who used TAP except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.1.14 shows the items that were asked of businesses that used the TAP service. This shows that:

- Just over a half (54%) businesses that had used the TAP said that the service helped them by improving their knowledge of export opportunities available, while one in ten (17%) said the service did not help in this way.
- Just over one-third of businesses (38%) that had used the TAP said the service helped them by improving their knowledge of the support available from DIT and elsewhere. Three in ten (30%) said the service did not help them in this way.
- Just over one-third (36%) of businesses that had used the TAP said it improved their knowledge of competitors in overseas markets, whilst 29% said the service did not help them in this way.
- Smaller proportions said that using the TAP improved their knowledge of the price of goods compared with those in overseas markets (29%) or the exporting processes (20%).

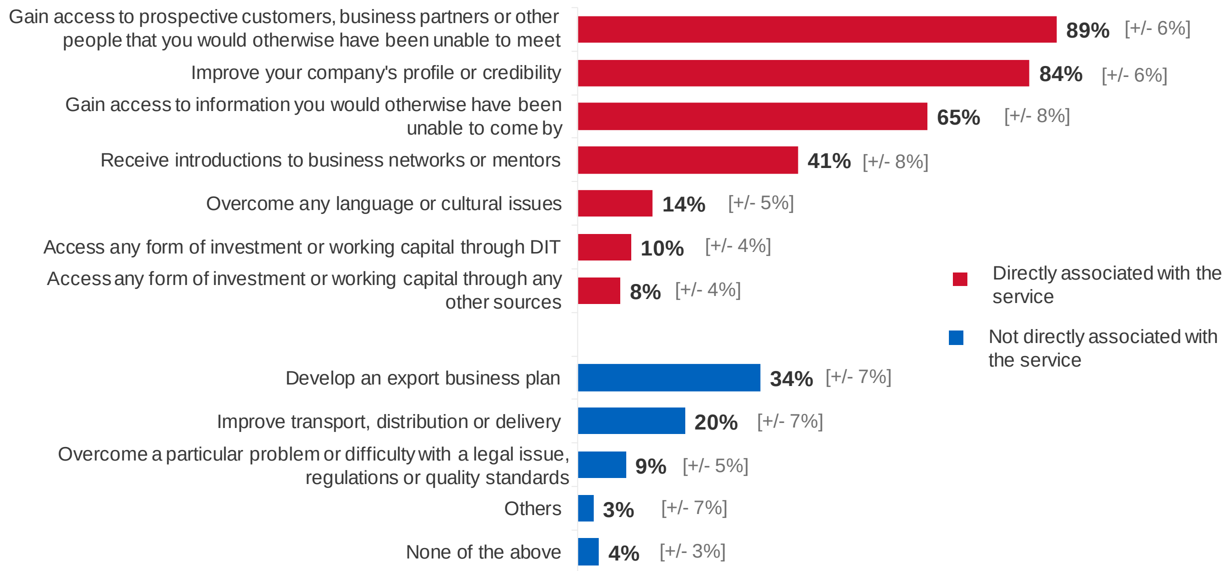
Chart 3.1.14 To what extent the business felt it has improved its knowledge as a result of using the service - TAP



QImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of [SAMPLED SERVICE]? Base: All respondents who used TAP except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using the TAP service in the year between dealing with the TAP and the RIS interview. A detailed breakdown of responses is shown in Chart 3.1.15, where activities in red show those most closely associated with the service. The most frequent responses from a pre-coded list were to gain access to prospective customers (89%), improve the company's profile or credibility (84%), gain access to information they would otherwise have been unable to come by (65%) and to receive introductions to business networks and mentors (41%). A third (34%) said TAP helped them develop an export business plan. One in five (20%) improved transport, distribution and delivery and one in ten (14%) overcame language or cultural issues.

Chart 3.1.15 In what ways has the business felt it had benefited from DIT support - TAP [21]



QServiceBenefit – In which of the following ways if any, has your business benefited specifically from [SAMPLED SERVICE] over the last year?
Base: All respondents who used TAP (200)

Businesses were asked whether using the TAP service had helped, or will help, support innovation and development as a business. Just under nine in ten (85%) said that using the service helped them with innovation or development in some way. Answer codes shown in red are most closely associated with the service. The most frequent responses were to ‘improve the way you do business overseas’ (69%) and introduce new products or services (57%). Around half said that using the TAP service helped them gain new ideas about products or services (53%), improve existing products or services (51%) or make improvements to new product or service development strategy (48%).

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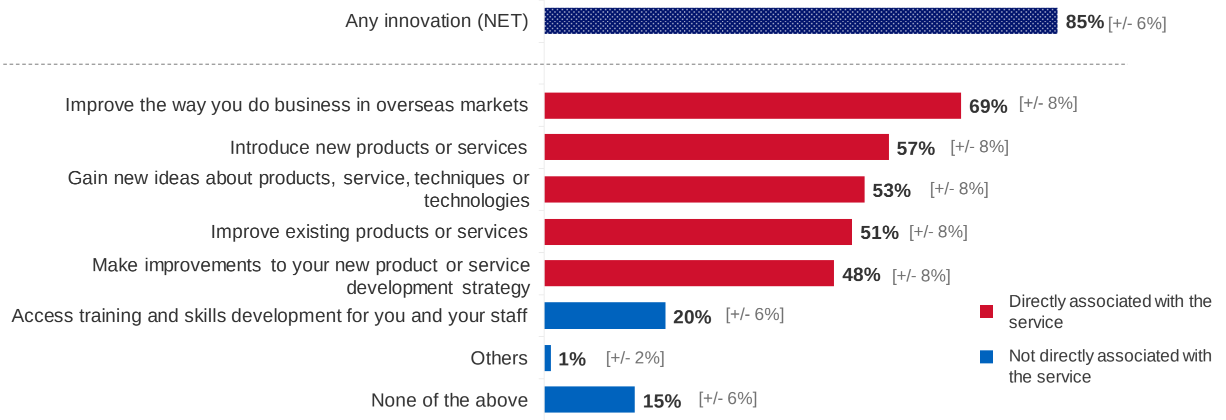
[21] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.1.16 Whether the service has / will help innovation and development - TAP [22] [23]



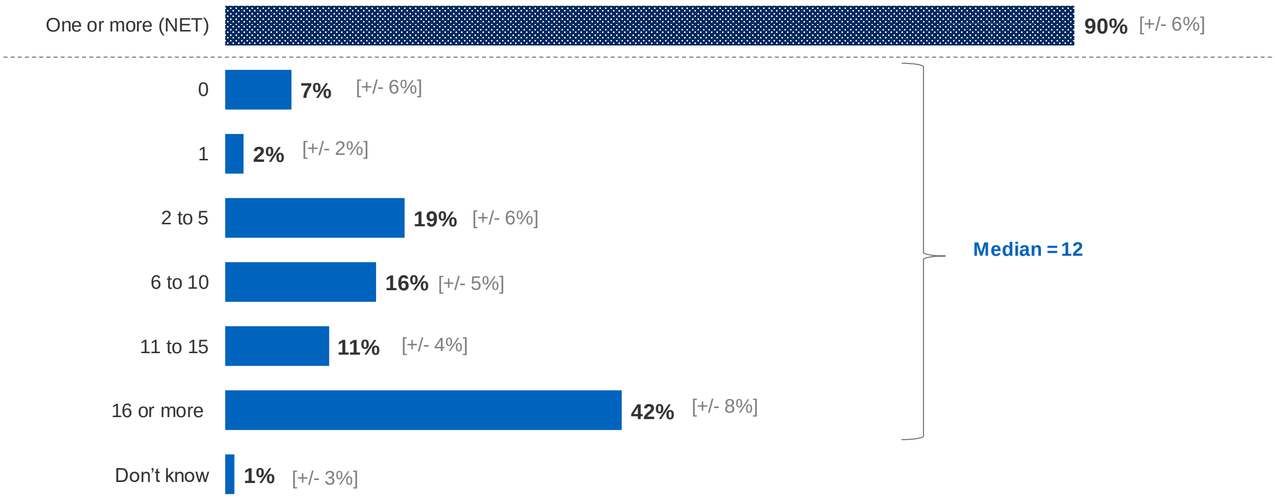
QInnovationSupport – Still thinking of [SAMPLED SERICE], has this service helped or do you expect it to help your business with development and/or innovation? Specifically…
Base: All respondents who used TAP (200)

International contacts

Businesses were asked how many overseas contacts they had made as a result of using the TAP service over the past year (Chart 3.1.17). Nine in ten (90%) businesses made at least one new overseas contact in the year since using the TAP service, with a median of 12 new contacts made. Two per cent made one new overseas contact, and 19% made between two and five new contacts. Just under one in five (16%) businesses made between six and ten new overseas contacts, and around half (53%) made more than ten new contacts. Seven per cent reported they did not make any new contacts as a result of using the TAP service.

[22] The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.
[23] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

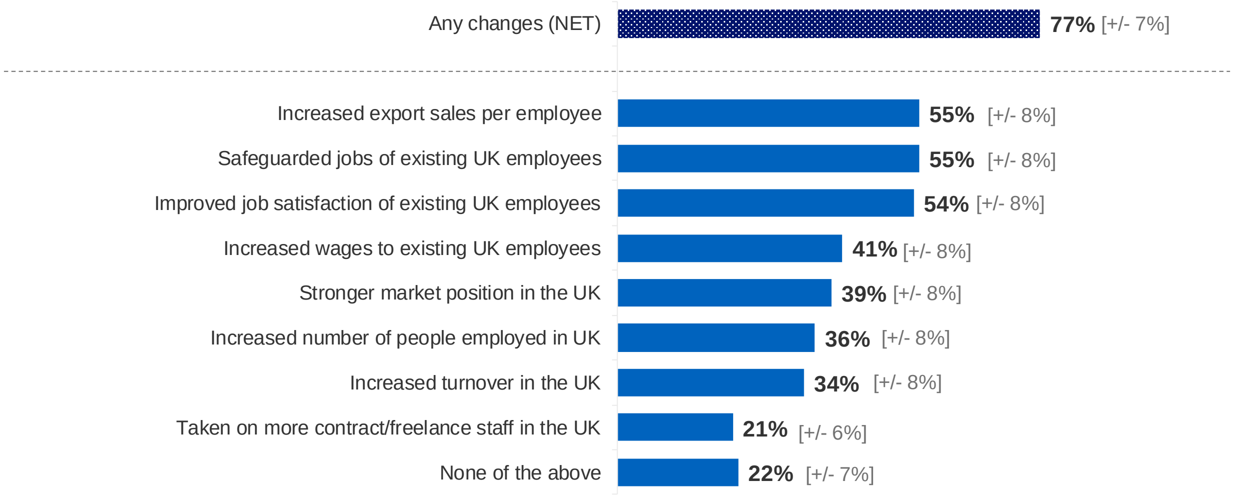
Chart 3.1.17 Number of new overseas contacts made in previous 12 months – TAP



Q_ContactsMade –How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
Base: All respondents who used TAP (200)

Businesses were asked about the impact they had seen or expected to see as a direct result of using the TAP service. Just over half of businesses said they had increased export sales per employee (or expected to do so) (55%), safeguarded jobs of existing UK employees (55%), or had seen or expected improved job satisfaction of existing UK employees (54%). Around four in ten businesses said they had seen or expected to see increased wages to existing UK employees (41%) or would strengthen their market position in the UK (39%). Just over a third had seen or expected to see an increase in the number of their UK employees (36%) or increased turnover in the UK (34%), while one in five had taken on more contract or freelance staff in the UK (21%).

Chart 3.1.18 Changes expected / seen in the UK business as a result of receiving the service - TAP [24]

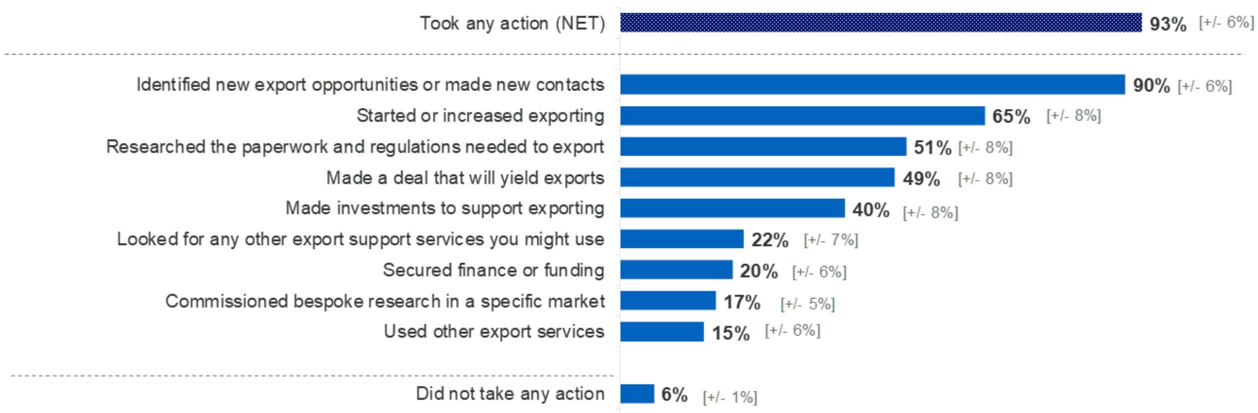


QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
Base: All respondents who used TAP (200)

3.1.10. Actions taken as a result of the service: TAP

Businesses were asked about the actions they had taken following their use of the TAP service (Chart 3.1.19). Nine in ten (90%) reported that they had identified new export opportunities or made new contacts, while a third (65%) had started or increased exporting. Half researched the paperwork and regulations needed to export (51%) or had made a deal that would yield exports (49%). Two-fifths said they had or made investments to support exporting (40%).

Chart 3.1.19 What the business has done as a result of receiving the service - TAP [25] [26]



QResultService - What has your business done as a result of TAP? Base: All respondents who used TAP (200). The net score also includes non-exporters who assessed their readiness to export.

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24 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

25 The 'Took any action (NET)' groups together all responses from the question apart from responses of 'Did not take any action'.

26 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Businesses were asked what organisations they had been in contact with since using the TAP service. A quarter of businesses had been in touch with public organisations such as the Chambers of Commerce in the UK (26%) and just under one in five had been in touch with innovate UK (16%). One in ten had been in touch with business, professional or trade bodies (9%) or the Department for Business, Energy and Industrial Strategy (BEIS) (9%). Half (54%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Chart 3.1.20 What organisations respondents have been in contact with since receiving the service - TAP[27]

QAnyContact – And again, since your business used [SAMPLED SERVICE] in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities?
Base: All respondents who used TAP (200)

*Other services include 'Friends/colleagues' (2%), 'Local Enterprise Partnerships' (1%), 'Private consultants or advisors' (1%), 'Devolved administrations' (1%), 'Any other lenders (such as export credit agencies' (1%), 'Banks' (0%) and any others.

27 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.2. International Trade Advisors (ITAs)

International Trade Advisors (ITAs) provide businesses with impartial face-to-face advice, to help them to identify the services and support they need to grow internationally. ITAs offer a broad range of services, including tailored advice, training opportunities and structured programmes. They can also introduce other services from across DIT, other government offices, and independent third-party service providers for more in-depth support across specialist areas.

3.2.1. ITAs: Quality survey summary

These findings are based on interviews with 902 businesses who used an ITA from April 2018 to March 2019 and participated in both the Quality Survey and Reported Impact Survey.

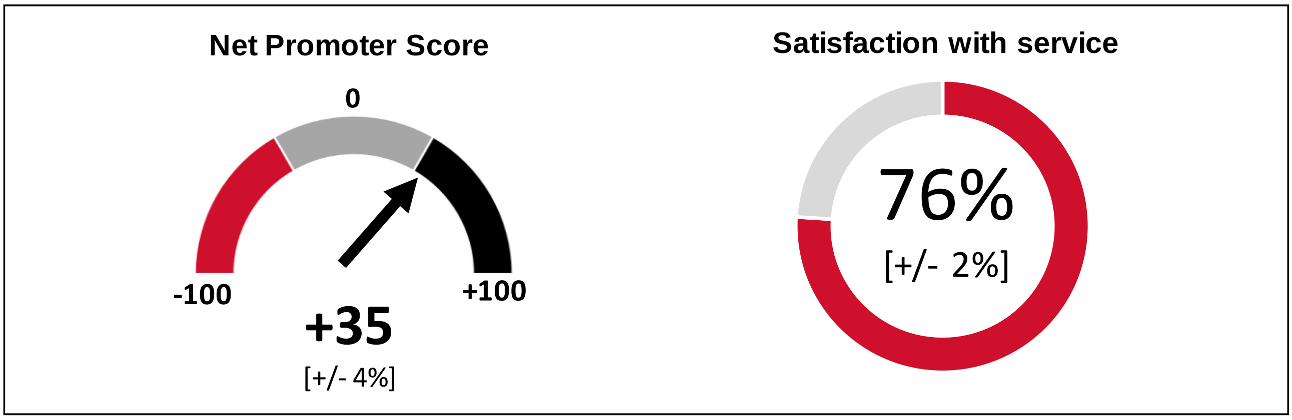
Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=2,001), as an overview of the businesses' experience of using the ITA service.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own[28]. More than half (54%) were 'Promoters' of ITAs, while one in six (18%) were 'Detractors' (score of 0-6) and one in four (27%) were neutral (score of 7-8). **Overall, ITAs had an NPS of 35.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)[29].

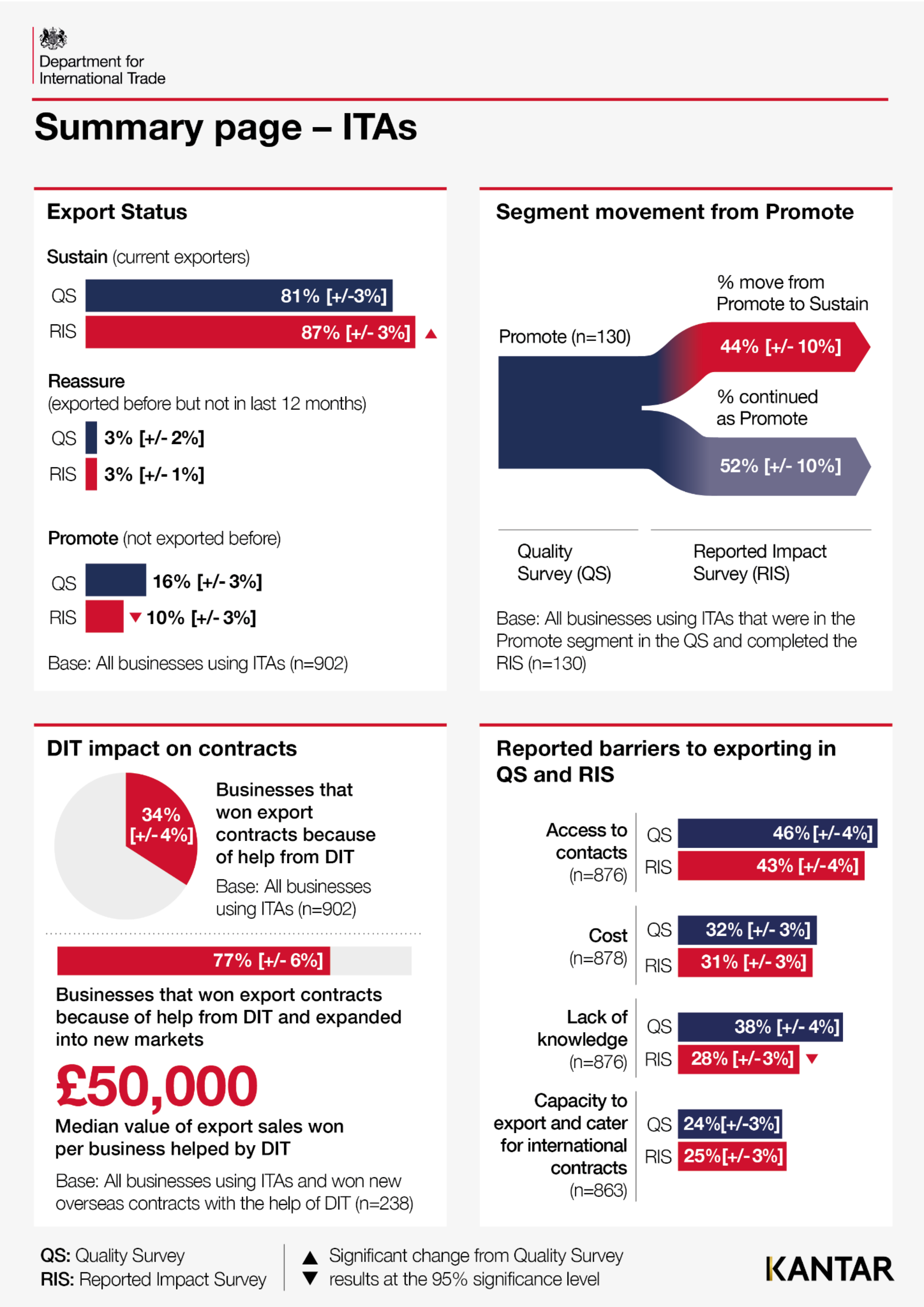
Overall, more than three-quarters (76%) of businesses were satisfied with their experience of ITAs (rating of 7 or more out of 10), and this included more than one in four businesses (24%) who gave a 'very satisfied' rating (10 out of 10).

Chart 3.2.1 Net Promoter Score and Satisfaction with service from Quality Survey - ITAs



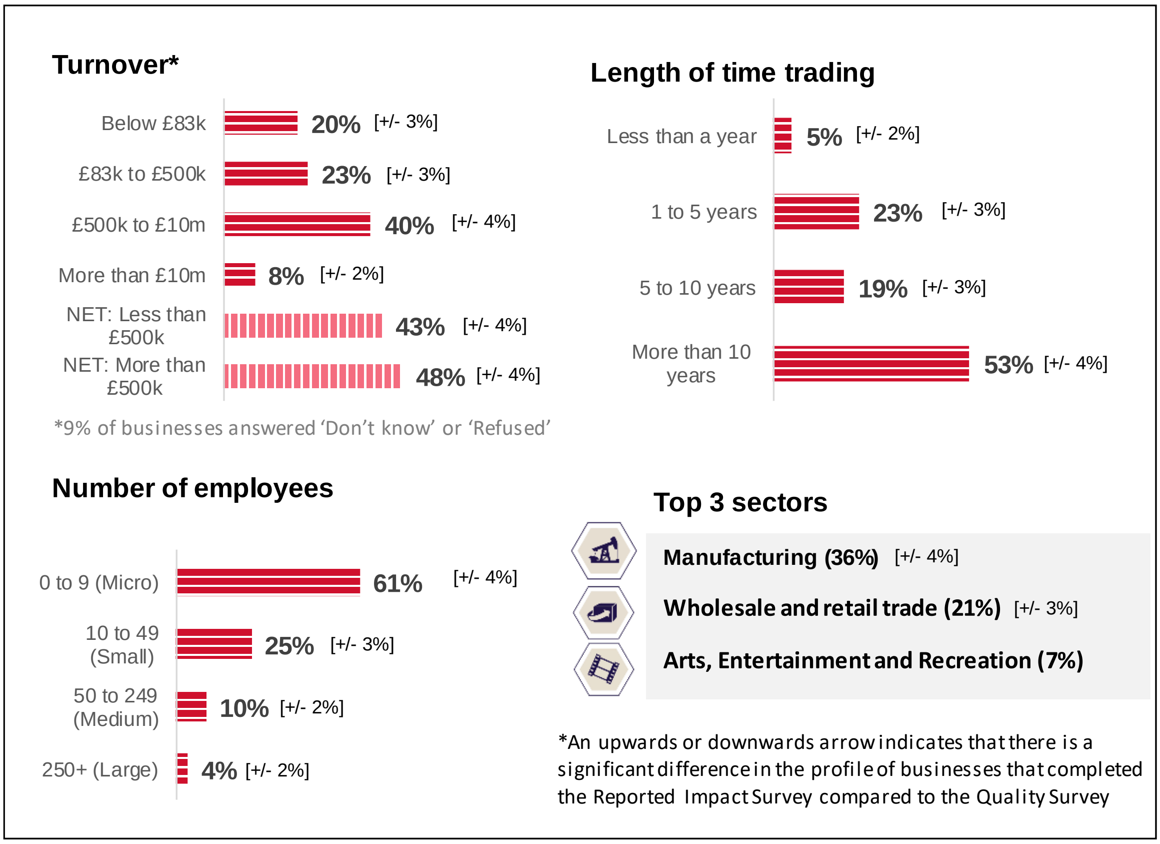
[28] Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.
[29] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.2.2 Key indicators from the RIS survey – ITAs



3.2.2. Profile of RIS survey respondents: ITAs

Chart 3.2.3 Profile of RIS Survey Respondents[30] - ITAs



Reported Impact on exporting

3.2.3. Export Status

Businesses that used the ITA service were asked about their export status, both at the time of their interaction with the ITA service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether export status of these businesses has changed over this period. DIT has grouped UK businesses into segments, which reflect businesses' views on their potential to export. These segments include:

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Eight in ten businesses (81%) that used the ITA service fell into this segment at the time of their interaction. This increased 12 months later to 87%.

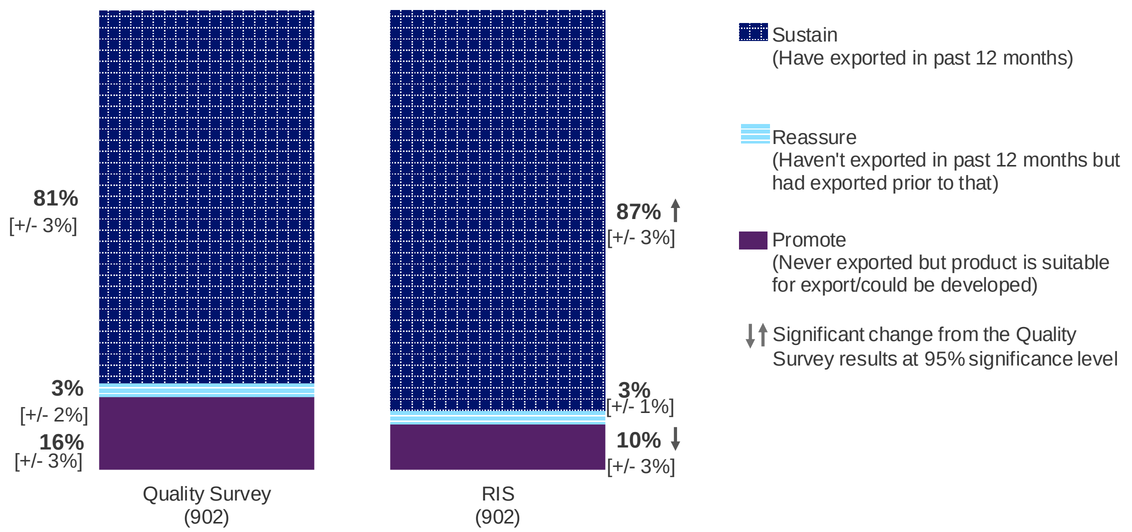
Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Three per cent that used the ITA service fell into this segment at the time of their interaction and this was unchanged 12 months later (also three per cent).

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed

[30] Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

for export. Under one in five (16%) that used the ITA service fell into this segment at the time of their interaction, compared with 10% of businesses that used the ITA service 12 months later.

Chart 3.2.4 Exporter status at time of interaction (Quality Survey) and 12 months later (RIS) - ITAs[31]



Source: Composite measure merging data from several variables
Base : All respondents who used ITAs and completed RIS: Quality Survey/ RIS (902/902)

The export status of some businesses changed between the time of interaction in the Quality Survey, and 12 months later in the RIS survey (Table 3.2.1). Overall, seven per cent of businesses reported that they had moved from Promote to Sustain, that is moved from having never exported, to having exported in the past 12 months. One per cent of businesses reported that they had moved from Sustain to Reassure, one per cent of businesses moved from Reassure to Sustain, and one per cent of businesses moved from Sustain to Promote.

Table 3.2.1 Change in export status at time of interaction (Quality Survey) and 12 months later (RIS) – ITAs

Quality Survey Reported Export status n=902	Reported Impact Survey Reported Export Status n=902	Percentage
Sustain, 743 businesses	Sustain, n=717	**97%** [+/- 1%]
	Moved to Reassure, n=14	**2%** [+/- 1%]
	Moved to Promote, n=12	**2%** [+/- 1%]
Reassure, 23 businesses	Moved to Sustain, n=10	**51%** [+/- 24%]

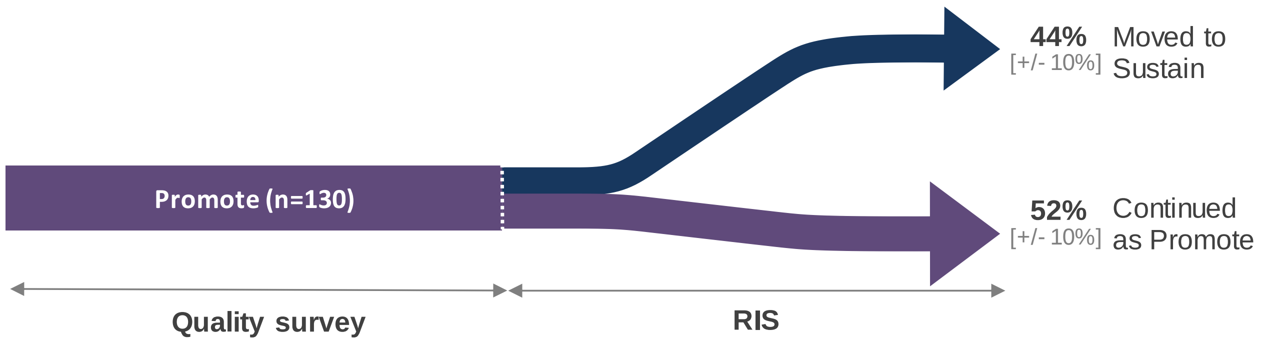
[31] Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote

Promote, 130 businesses	Moved to Sustain, n=64	**44%** [+/- 10%]
	Promote, n=62	**52%** [+/- 10%]

Source: Composite measure merging data from several variables. Shaded values represent movements not logically possible so may represent respondent error. Data only includes respondents that provided details of their export status in both surveys.

Looking specifically at businesses that were in the Promote segment (never exported) at the time of the Quality Survey (130 businesses), around two in five of these (44%) reported that they had moved into the Sustain segment (exported in the last 12 months) by the time of the RIS survey[32] (Chart 3.2.5). Of the businesses that were in the Sustain segment at the time of the Quality Survey (743 businesses), the majority (97%) reported that they had continued in Sustain and two per cent had moved to Reassure (not exported in the last 12 months but have exported previously)[33].

Chart 3.2.5 Exporter status reported at time of interaction (Quality Survey) and 12 months later (RIS) [rebased] - ITAs



Source: Composite measure merging data from several variables
Base : All ITA respondents who were in the Promote segment in the Quality Survey and completed RIS: Quality Survey (Promote = 130)

3.2.4. Reported Export Contracts Achieved since receiving the service: ITAs

Businesses that reported that they had exported were asked if they had won any new export contracts, or extended any existing contracts in the 12 months since using the ITA service. They were asked to think of all contracts, not just those assisted by the ITA service or DIT.

Of the 87% of businesses that exported (793 businesses), 79% reported that they had won any new overseas business contract and/or had gained extensions to existing overseas business contracts in the year since they used the service.

Of the 87% of businesses that exported, eight in ten (76%) of these exporting businesses reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.2.6). Nine per cent had won one overseas contract, with one in three (36%) winning

[32] Of the businesses that were in the Sustain segment at the time of the Quality Survey, two per cent reported that they had moved to Promote. This movement is likely to be caused by respondent error when completing the survey.
[33] Of the businesses that were in the Promote segment at the time of the Quality Survey, three per cent reported that they had moved to Reassure. This movement is likely to be caused by respondent error when completing the survey.

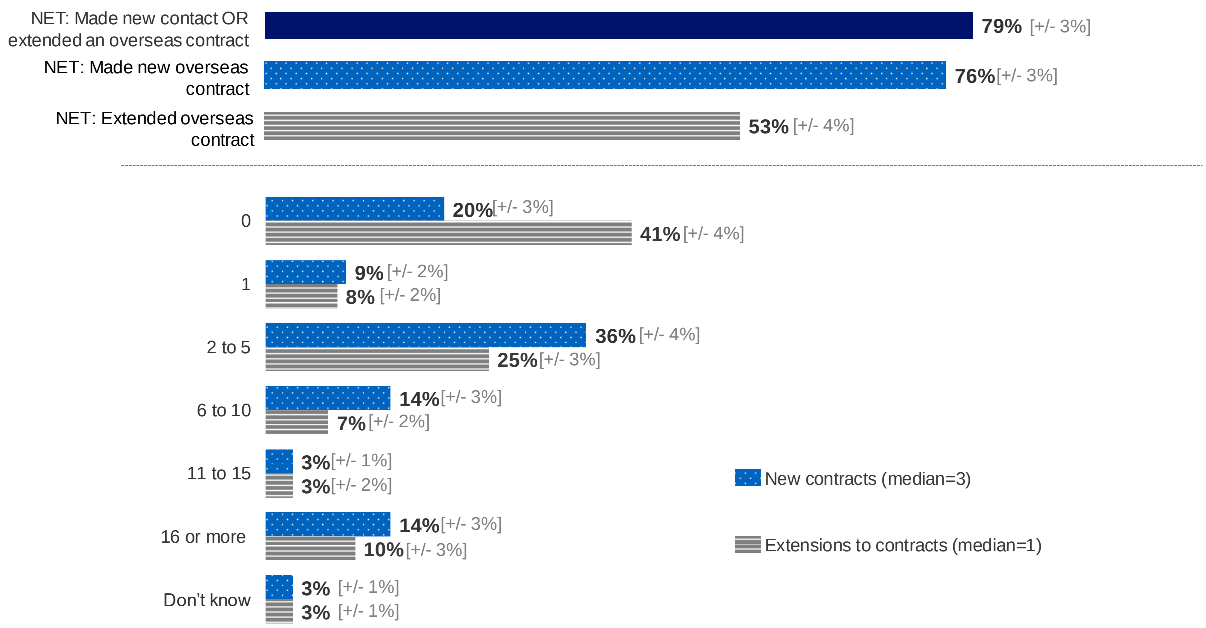
between two and five. One in five (14%) businesses had won more than fifteen overseas contracts, while five per cent had won more than fifty contracts.

The median number of contracts won among exporting businesses that used the ITA service was three (this is taken from the 77% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

Just over half (53%) of exporting businesses that used the ITA service reported they had gained extensions to existing overseas business contracts in the year since they used the service. Eight per cent extended one, a quarter (25%) between two and five, seven per cent between six and ten, and 13% extended more than ten existing overseas sales contracts. Five per cent had extended more than 40 contracts. Four in ten (41%) businesses had not extended any existing contracts.

The median number of contracts extended (including those that did not extend any) was one.

Chart 3.2.6 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contract made in previous 12 months - ITAs[34]



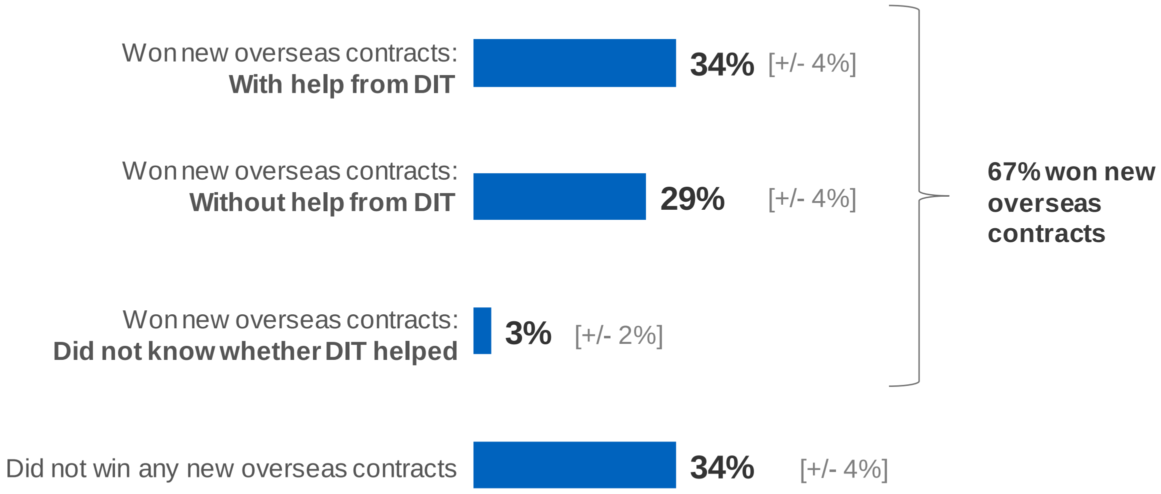
Q_Newcontract – Firstly, how many new overseas business contracts for export sales did you win in the past year?
Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
Base: All respondents who used ITAs and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (793)

Reported additional contracts which were gained because of DIT support - ITAs

Looking at all business that used ITAs (including those that were not currently exporting and those that did not win any contracts or contract extensions), 34% said they won contracts with the assistance of the ITA service or DIT[35], 29% won one or more contracts without the assistance of DIT and three per cent were unsure.

[34] The total percentage of all responses for this question add up to above 100 per cent because of rounding.
[35] Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.2.7 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support - ITAs



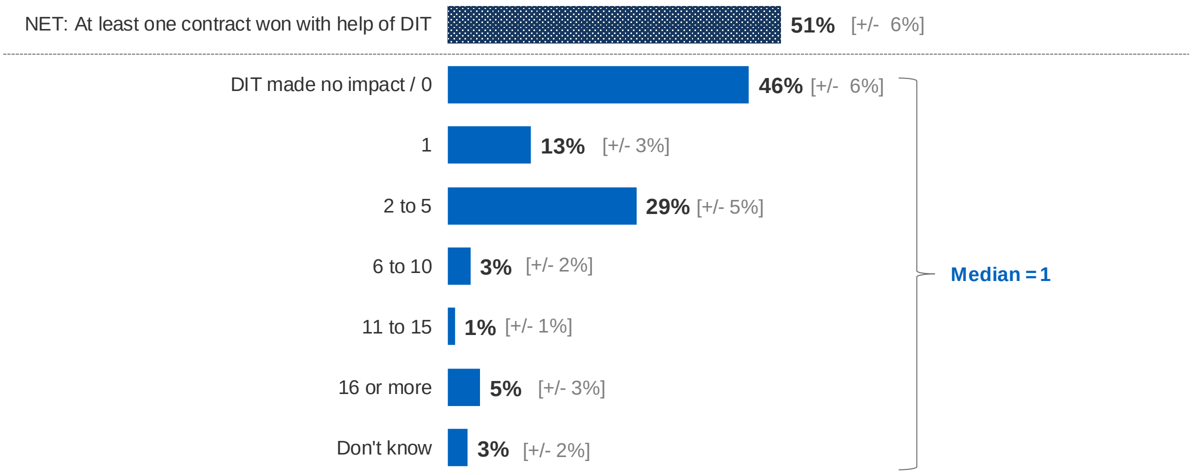
Base: All respondents that used ITAs (902)

The section below **only includes results for 439 businesses, that is 49% of the businesses that were interviewed. These are businesses that both exported, won at least one new contract in the 12 months since their interaction with the ITA, *and* could estimate the number of contracts won with the assistance of the ITA service or DIT** - this includes businesses that said DIT made no impact on the number and value of new overseas business contracts they won. The remaining 51% of businesses interviewed did not meet these criteria and therefore were not asked the following questions.

The median number of contracts that DIT helped win was one for current exporters that used the ITA service.

Businesses who won at least one new contract were asked how many of these were won with the help of DIT in the last 12 months. As shown in Chart 3.2.8 below, this includes four in ten (46%) that said they won no new overseas sales contracts with the help of DIT, or DIT made no impact. Over one in ten (13%) had won one new overseas sales contract, and three in ten (29%) between two and five. Five per cent won more than 15 overseas sales contracts due to DIT support.

Chart 3.2.8 Number of new overseas contracts that said to be won with the help of DIT in the last 12 months (includes those who said DIT made no impact) - ITAs



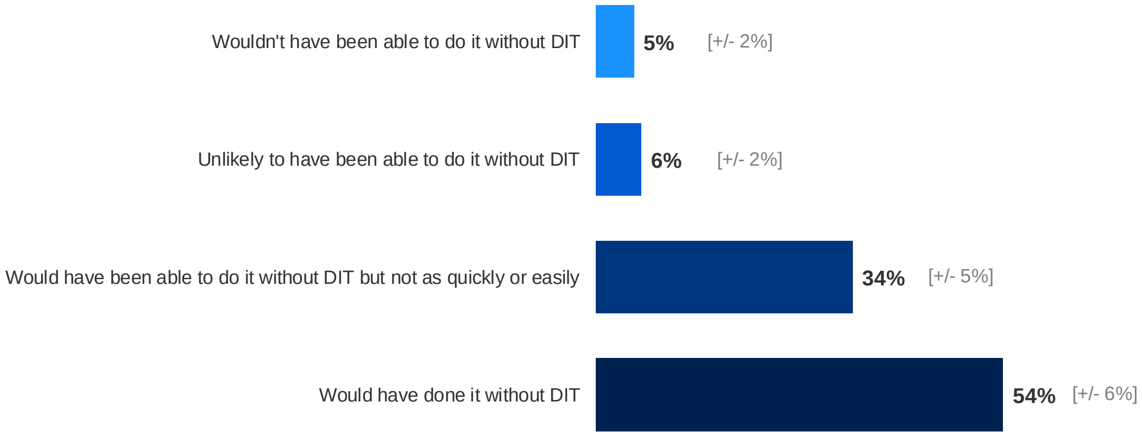
Q_ContractDIT - Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?
Q_ContractNumber–How many new overseas contracts were won with help from DIT
Base: All respondents that used ITAs and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (439)

Importance of DIT's support in winning overseas contracts - ITAs

The 47% of businesses that exported, won at least one new contract in the 12 months since their interaction with ITAs and could estimate the number of contracts won with the assistance of the ITA service or DIT (excluding those that answered 'don't know') were asked how important this help was. To understand the support the service provided for this analysis, **exporting businesses who said that DIT made no impact / did not help them win any new contracts were not asked this question directly but have been included in the 'would have done it without DIT' code below**.

Just under half of these businesses reported that DIT was important in helping them win these contracts. Five per cent of those who won at least one new overseas contract said they would not have been able to do it without DIT and six per cent thought it was unlikely they could have done it without DIT. A further three in ten (34%) thought they would not have been able to do it as quickly or easily without DIT (Chart 3.2.9). The remaining 54% thought they would have been able to achieve the same outcome without DIT support.

Chart 3.2.9 How important DIT's help was in winning overseas contracts - ITAs



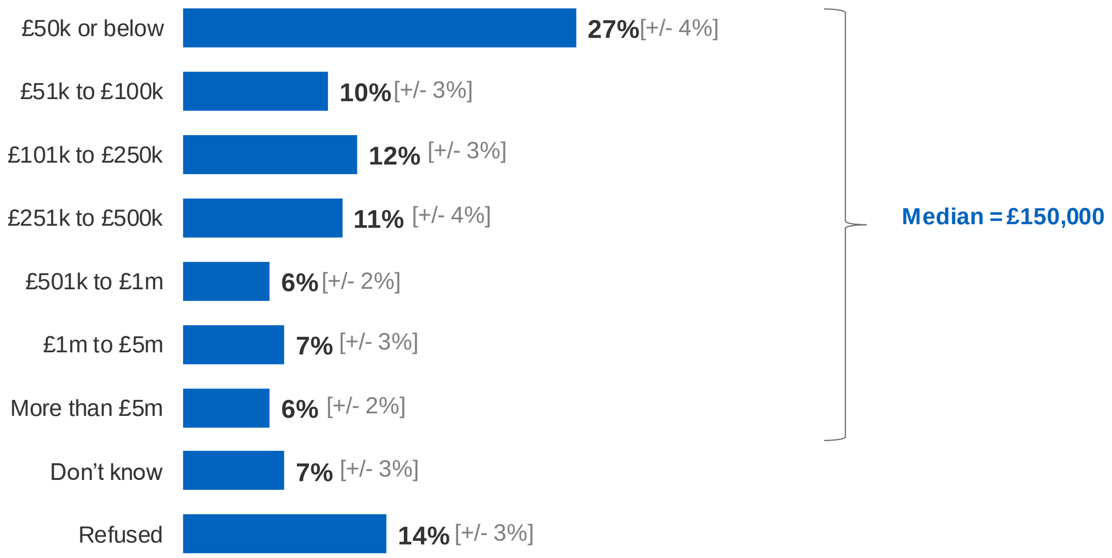
QContractHelp – How important was DIT's help in winning these overseas contracts?
Base: All ITA respondents who won any new overseas contracts in the past year (427)

3.2.5. Reported value of export sales achieved since receiving the service: ITAs

Reported value of the export sales of new contracts - ITAs

The 67% of businesses that reported winning any new overseas contracts (excluding extensions to existing contracts) were asked the value of the export sales of those contracts in total (Chart 3.2.10). The median value of the export sales of all new overseas contracts for these businesses was £150,000. A quarter (27%) won contracts with export sales value of £50,000 or below. Just over one in ten (13%) said that the export sales of the new overseas contracts won was worth more than £1 million.

Chart 3.2.10 Value of all new overseas contracts made in previous 12 months – ITAs



QcontractValue – What is the value of all these new overseas business contracts for export sales?
Base: All respondents who used ITAs and won any new overseas sales contracts (604)

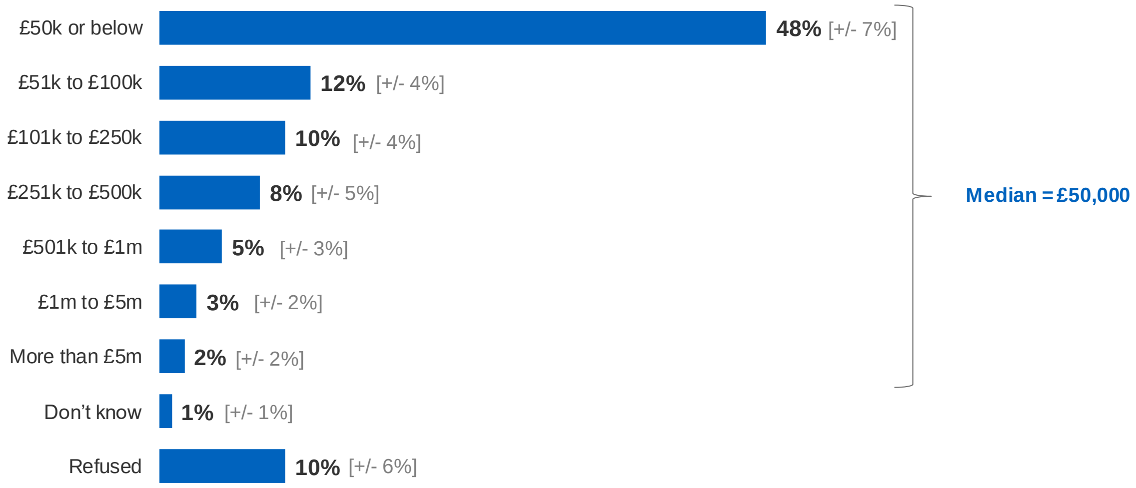
Reported additional value of DIT support - ITAs

This section looks at the additional value that support from DIT contributed towards businesses. If businesses were not able to estimate the impact of the specific service they were interviewed about they were asked to think about the impact from all of their interactions with DIT. This measures the additional contribution that DIT made towards businesses outcomes, including the number and value of new overseas contracts made.

Respondents were also asked to estimate the value of the new overseas business contracts that the business won with the help of DIT support. This is used to estimate reported additional impact of using DIT services on export sales and referred to as the reported additional export sales. The reported additional export sales for ITAs was £50,000 across all the contracts that ITAs helped them win[36]. Please note that this does not include businesses that did not win any new export contracts or businesses that said DIT made no impact on overseas contract wins.

About half (48%) reported additional export sales of £50k or below, with a further 12% reporting additional new export sales of between £51k and £100k. There was a small proportion of businesses that had exceptionally large value added by DIT support. Five per cent won overseas sales contracts helped by DIT of more than £1m (Chart 3.2.11).

Chart 3.2.11 Value of new overseas contracts helped by DIT support in previous 12 months - ITAs



QcontractValueDIT – What was the value of these new overseas business contracts that your business won with the help of [SAMPLED SERVICE] /DIT support last year?
Base: All respondents who used ITAs and won any new overseas sales contracts with the help of DIT (238)

When looking solely at the businesses that could estimate the value of contracts DIT helped in winning, when compared with the total value of all their new export contracts, it is estimated that ITAs helped with 53% of the value of new contracts on average (the median). For a quarter of these businesses the entire value of export contracts that they won in the previous 12 months was helped by ITAs.

To estimate the **median value of export sales <u>per contract</u> that ITAs helped businesses win,** we combined the value of export sales won and divided it by the number of contracts won with DIT support; the median value was £17,500. We also estimated the **median value of export sales**

won per business with DIT support (where the same business may have won several new contracts); the median value per business that won contracts was £50,000 (across all contracts).

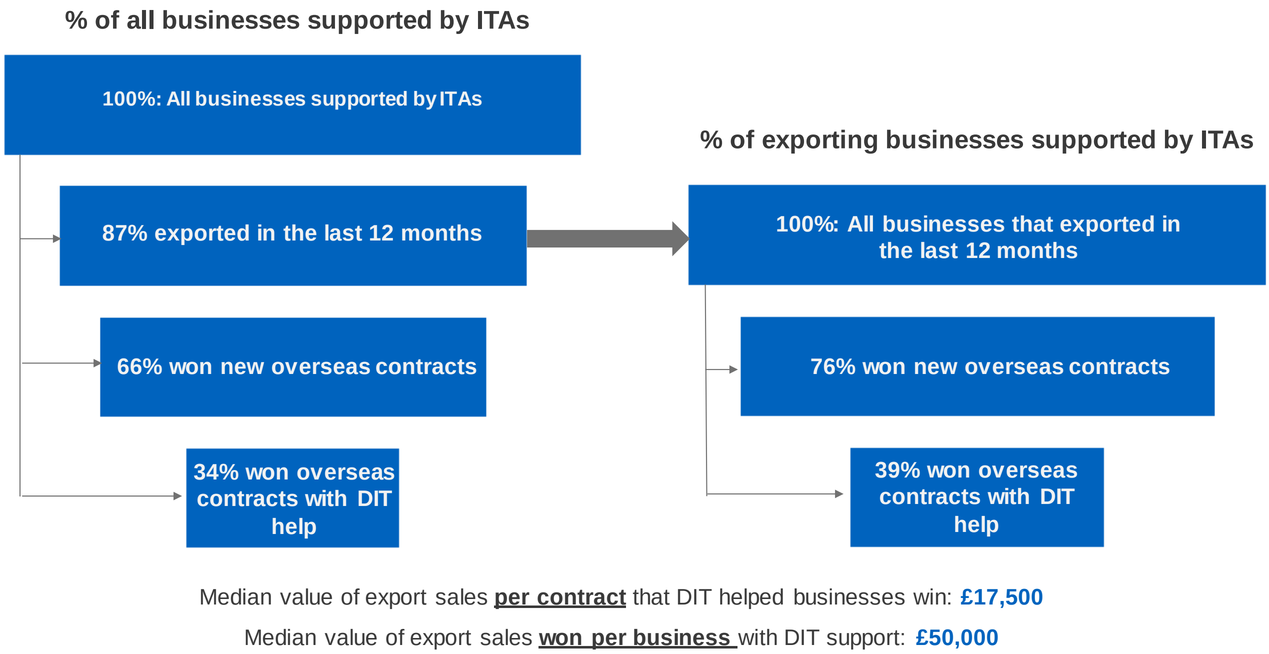
3.2.6. Summary of reported impact as a result of DIT support: ITAs

This section summarises the analysis on reported additional impact which aims to estimate the additional impact that DIT services had on businesses, this impact would not have happened without DIT's support.

Looking at all businesses supported by ITAs interviewed in the survey (including those that did not export or did not win any new or extended any overseas contracts at the time of the impact survey), almost nine in ten (87%) were exporters, meaning they were exporting at the time of service use or in the last 12 months.

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this[37].

Chart 3.2.12 Summary of businesses supported by ITAs[38]



Base: All respondents who used ITAs (902)

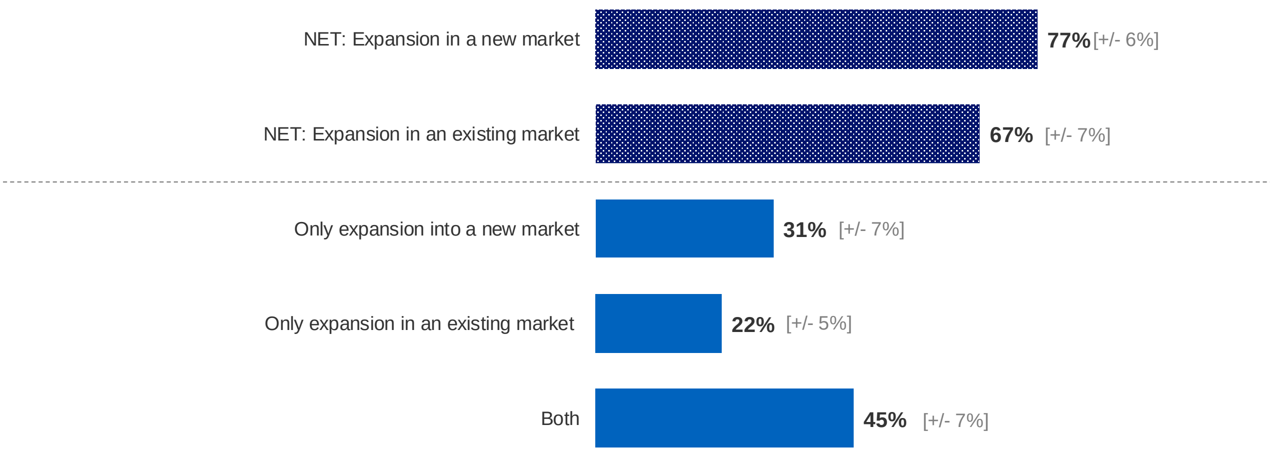
[37] The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

[38] In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 51% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so 51% * 66% = 34%. Find more information about how this was calculated in the technical report.

3.2.7. Exposure and growth within new markets: ITAs

Businesses that reported that they were helped by DIT to win new overseas contracts and were able to provide details of the number and value of these contracts were asked whether these new contracts represented expansion into a new market or expansion within an existing market (or both). It was slightly more common to have been assisted with expansion into a new market (77%) than within an existing market (67%). About half (45%) reported that DIT helped them expand into both existing and new markets. An additional three in ten (31%) said that DIT helped them expand into new markets and two in ten (22%) expanded within an existing market (but not into a new market).

Chart 3.2.13 Whether new contracts won with DIT's help represented expansion into new markets or existing markets – ITAs



QContractRepresent – And did these new overseas contracts represent….?
Base: All respondents who used ITAs and made new overseas contracts in the last year that were helped by DIT (238)

All businesses that used ITAs were asked whether they received increased exposure or started doing business in any new markets because of their interaction with an ITA[39]. Under one in five (17%) had been exposed to at least one new market and 14% had started doing business in at least one new market as a result of using the ITA service.

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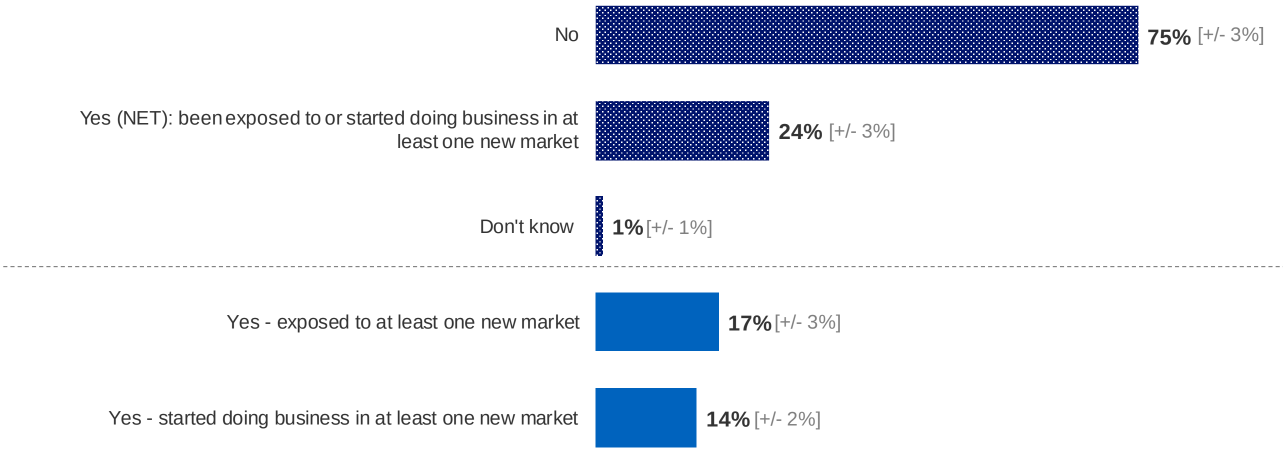
[39] Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

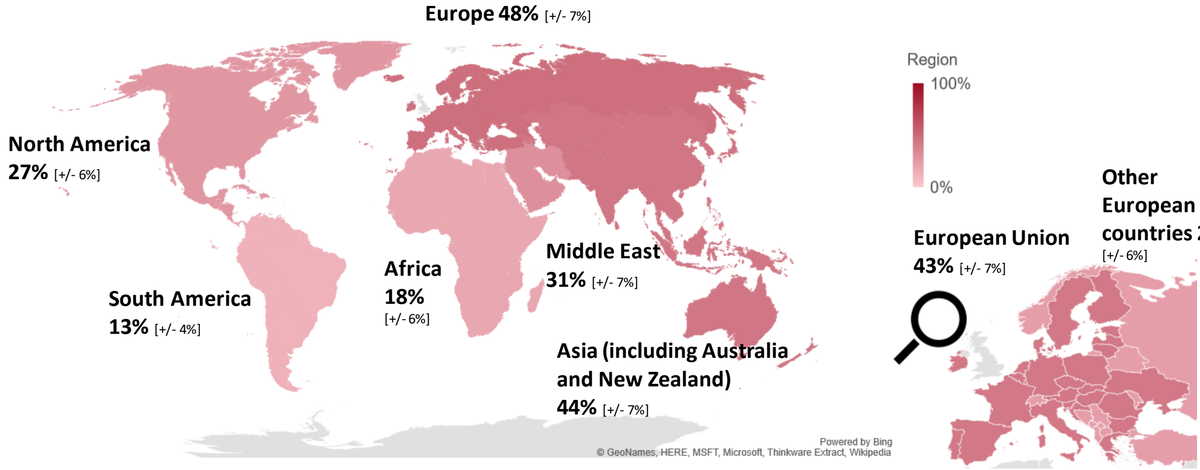
Chart 3.2.14 Whether increased exposure or starting business in a new overseas market - ITAs



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SAMPLED SERVICE]?
Base: All respondents who used ITAs (902)

Starting to do business in a new market and exposure to a new market were more frequent among those who in the quality survey gave a high rating (nine or ten) when asked about the likelihood of recommending using an ITA (20% and 26% respectively) than businesses that gave a low score (between zero and six) (5% and 6% respectively). Businesses that sold goods overseas were more likely than businesses that sold services overseas to have started doing business in at least one new market (18% compared with 9%).It was most frequent to have increased exposure or business in Europe (48%). Looking within Europe, just under three in five (43%) businesses in Western European countries such as Norway, Iceland and Switzerland and 23% had in Eastern European countries such as Russia and Ukraine. The next most common areas were Asia (including Australia and New Zealand) (44%) and the Middle East (31%).

Chart 3.2.15 Which new markets has the business started doing business in or been exposed to - ITAs



Europe	48% [+/- 7%]
Asia (including Australia and New Zealand)	44% [+/- 7%]
Middle East	31% [+/- 7%]
North America	27% [+/- 6%]
Africa	18% [+/- 6%]
South America	13% [+/- 4%]

European Union	43% [+/- 7%]
Other European countries	23% [+/- 6%]

QNewRegion – And which of the following new markets has your business started doing business in or been exposed to? Base: All respondents who have had increased exposure to, or started doing business in at least one new market (243)

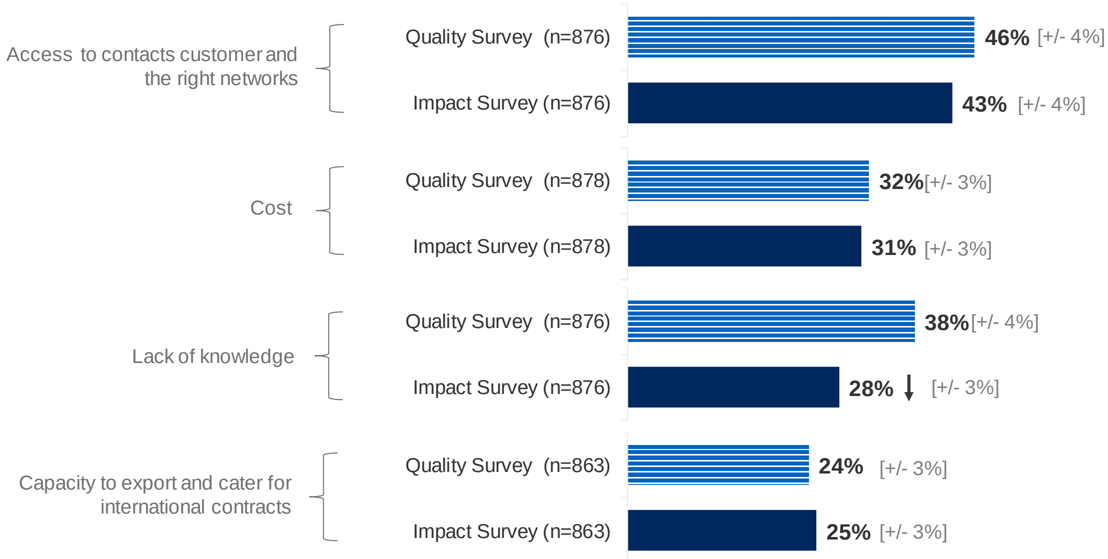
3.2.8. Barriers to exporting: ITAs

Businesses were asked in both the Quality Survey and Reported Impact Survey about some **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 0 (not a barrier at all). This section compares results from between surveys for businesses who completed both surveys and provided a response to this question in both surveys[40].

There was a significant decrease in the proportion that said 'lack of knowledge' was a barrier to exporting (rating 7 of 10 out of 10), from 38% at the Quality Survey to 28% at the RIS (Chart 3.2.16). There were no significant changes in the proportion of businesses that said 'access to contacts, customers and the right networks', 'cost' or 'capacity' were barriers to exporting.

[40] Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.2.16 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys - ITAs [41]



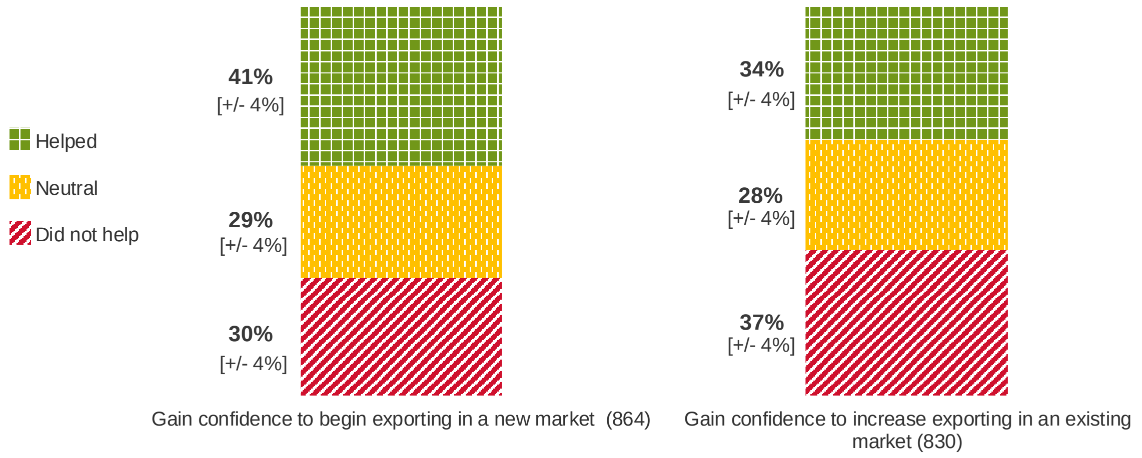
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents who used ITAs except those giving a 'not applicable' answer

3.2.9. Wider benefits of service: ITAs

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market using a similar rating scale as above. Businesses were more likely to have said that using the ITA service helped them gain confidence to begin exporting in a new market (41%) than that it did not help them (30%). Businesses were as likely to say that it helped them gain confidence to increase exporting in an existing market than say it did not help them (34% and 37% respectively).

41 The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Chart 3.2.17 To what extent experience of the service helped to build confidence in exporting - ITAs

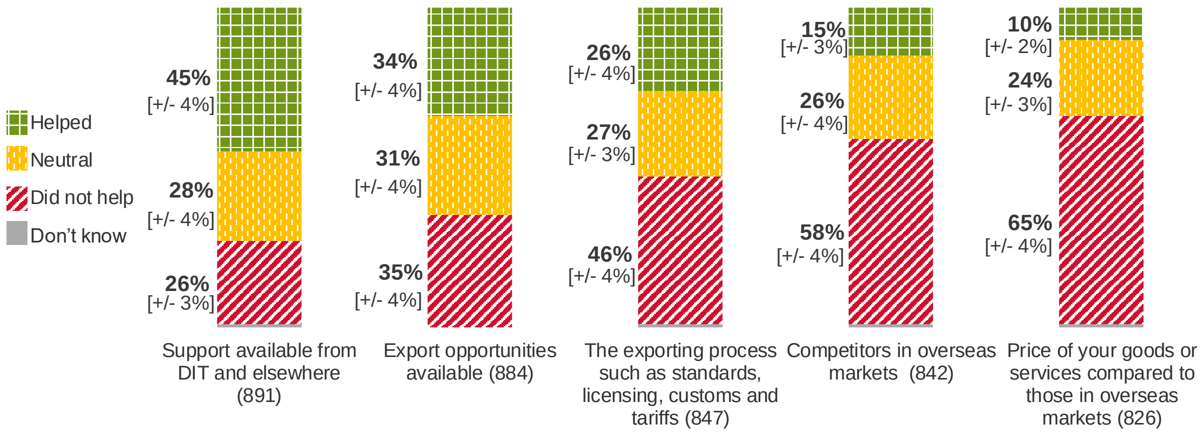


QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of [SAMPLED SERVICE] help you to?
Base: All respondents who used ITAs except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.2.18 shows the items that were asked of businesses that used ITAs. This shows that:

- Just under half (45%) of businesses that had used ITAs said that the service helped them by increasing their knowledge of the support available from DIT and elsewhere, while a quarter (26%) said the service did not help them in this way.
- About a third of businesses that had used an ITA (34%) said that the service had helped them to increase their knowledge of the export opportunities available, a similar proportion (35%) said they were not helped in this way.
- Businesses that used ITAs were more likely to say that the service did not help them improve their knowledge than they were to say it helped improve it for their knowledge of:
    - the exporting process;
    - competitors in overseas markets and;
    - price of goods or services compared with those in overseas markets.

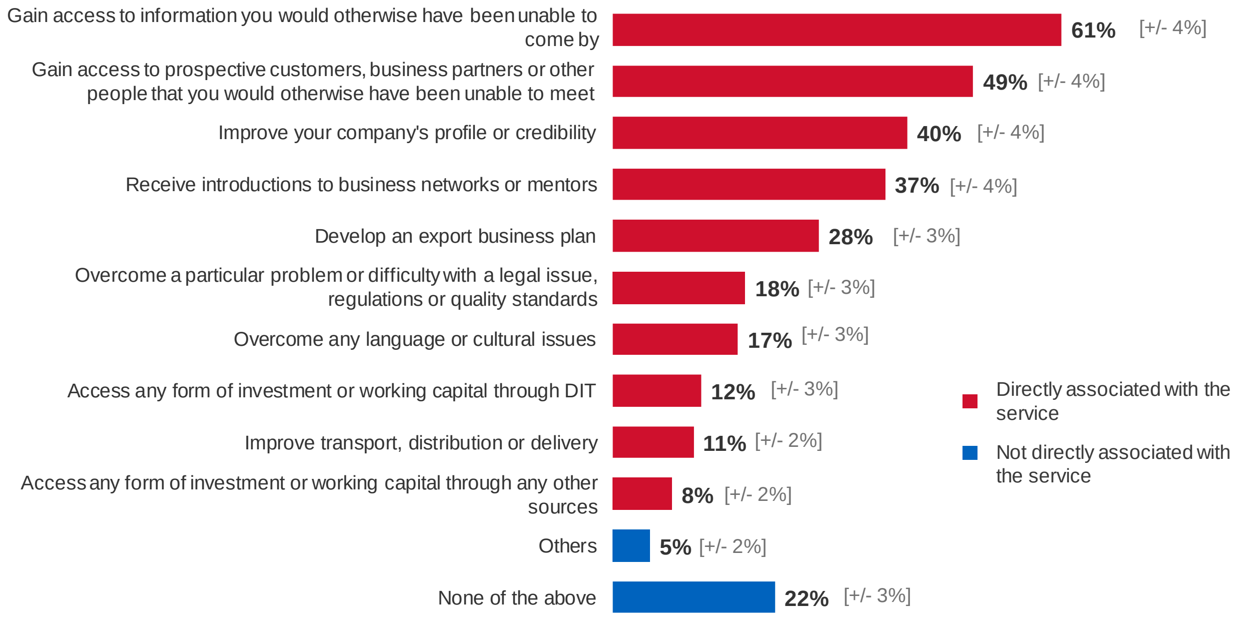
Chart 3.2.18 To what extent the business felt it has improved its knowledge as a result of using the service - ITAs



QImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of [SAMPLED SERVICE]? Base: All respondents who used ITAs except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using the ITA service in the year between dealing with the ITA and the RIS interview. A detailed breakdown of responses is shown in Chart 3.2.19 where activities in red show those most closely associated with the service. The most frequent responses from a pre-coded list were to gain access to information they would otherwise have been unable to come by (61%) and gain access to prospective customers (49%). Four in ten improved the company's profile or credibility (40%) or received introductions to business networks (37%). Three in ten developed an export business plan (28%), whilst two in ten overcame problems with a legal issue, regulation or quality standards (18%).

Chart 3.2.19 In what ways has the business felt it had benefited from DIT support - ITAs[42]

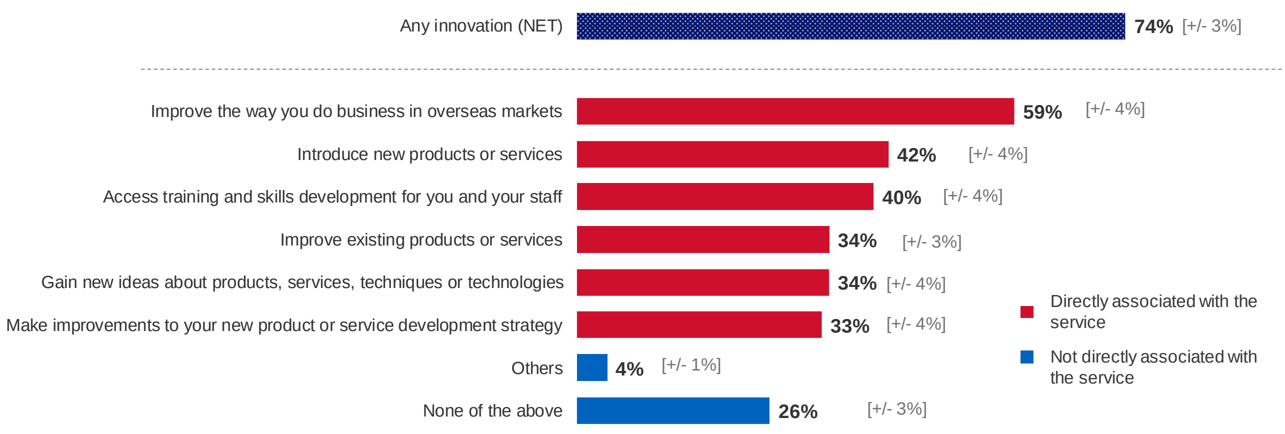


QServiceBenefit – In which of the following ways if any, has your business benefited specifically from [SAMPLED SERVICE] over the last year?
Base: All respondents who used ITAs (902)

Businesses were asked whether using the ITA service has helped, or will help, support innovation and development as a business. Over seven in ten (74%) said that using the service helped them with innovation or development in some form. Answer codes shown in red were most closely associated with the service. The most frequent response was to 'Improve the way you do business overseas' (59%). Two in five said that using the ITA service helped them to introduce new products or services (42%) or access training and skills for themselves or their staff (40%). Around a third said that it helped them improve their existing products or services (34%), gain new ideas about products or services (34%) or make improvements to their new product or services development strategy (33%).

[42,19] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.2.20 Whether the service has / will help innovation and development - ITAs[43][44]



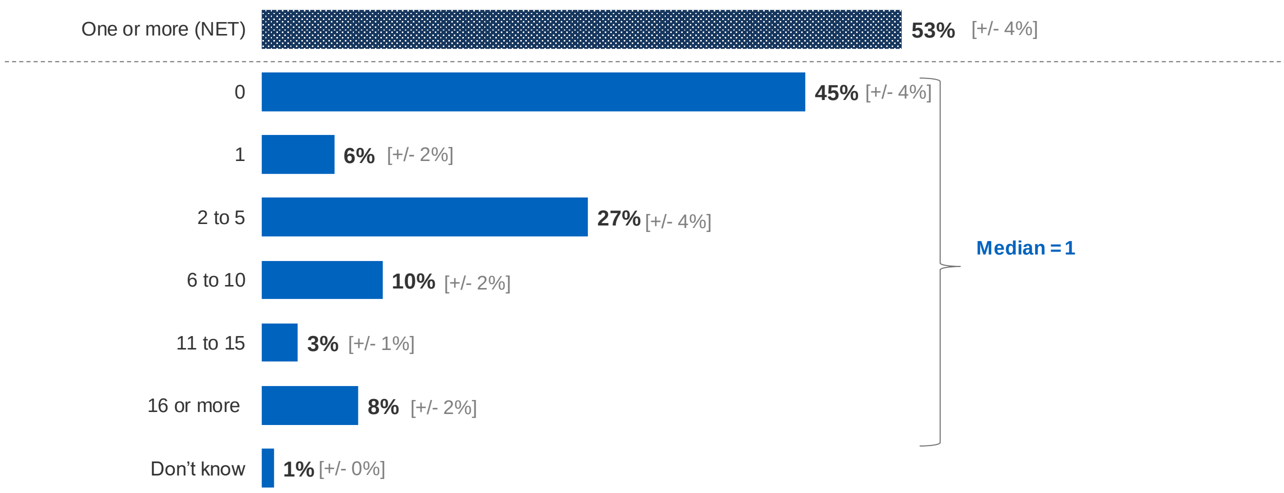
QInnovationSupport – Still thinking of [SAMPLED SERVICE], has this service helped or do you expect it to help your business with development and/or innovation? Specifically…
Base: All respondents who used ITAs (902)

International contacts

Businesses were asked how many overseas contacts they had made as a result of using the ITA service over the past year (Chart 3.2.21). Just over half (53%) of businesses reported they had made at least one new overseas contact in the year since using the ITA service, with a median of one new contact made. Six per cent made one new overseas contact, a quarter (27%) made between two and five new contacts. Ten per cent of businesses made between six and ten new overseas contacts, and a similar proportion made more than ten new contacts (10%). Almost a half (45%) reported that that had not made any new contacts as a result of using the ITA service.

[43] The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.

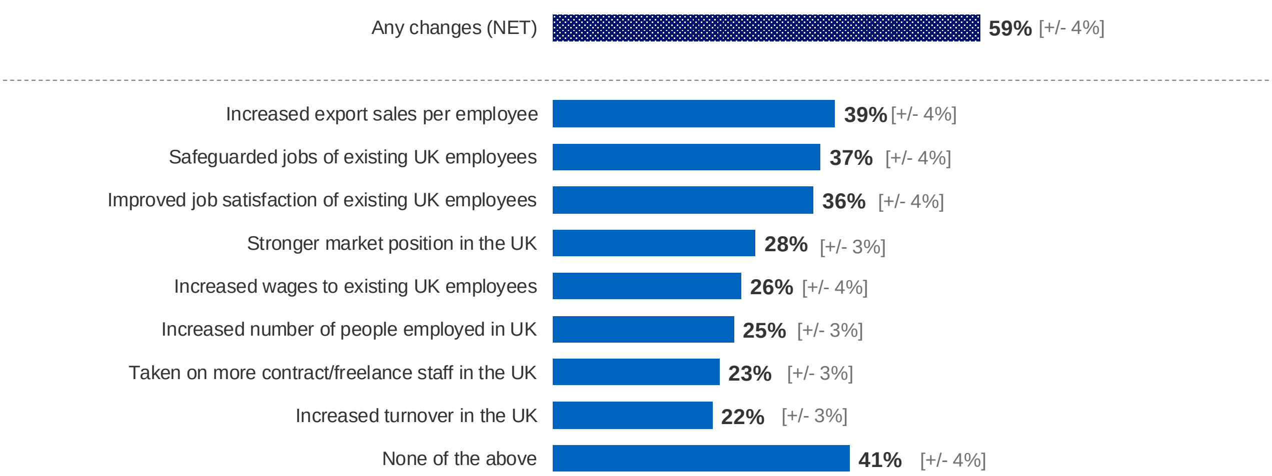
Chart 3.2.21 Number of new overseas contacts made in previous 12 months - ITAs



Q_ContactsMade –How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
Base: All respondents who used ITAs (902)

Businesses were asked about the impact they had seen or expected to see as a direct result of using the ITA service. In terms of impact on employment, four in ten users said they thought using the ITA service had, or would, safeguard jobs in the UK (37%) and improve job satisfaction of existing UK employees (36%). A quarter said that they had increased the wages of existing UK employees (26%) or increased the number of people employed in the UK (25%). Using the ITA service also had a beneficial impact on productivity with four in ten businesses reporting increased export sales per employee (39%).

Chart 3.2.22 Changes expected / seen in the UK business as a result of receiving the service - ITAs[45]



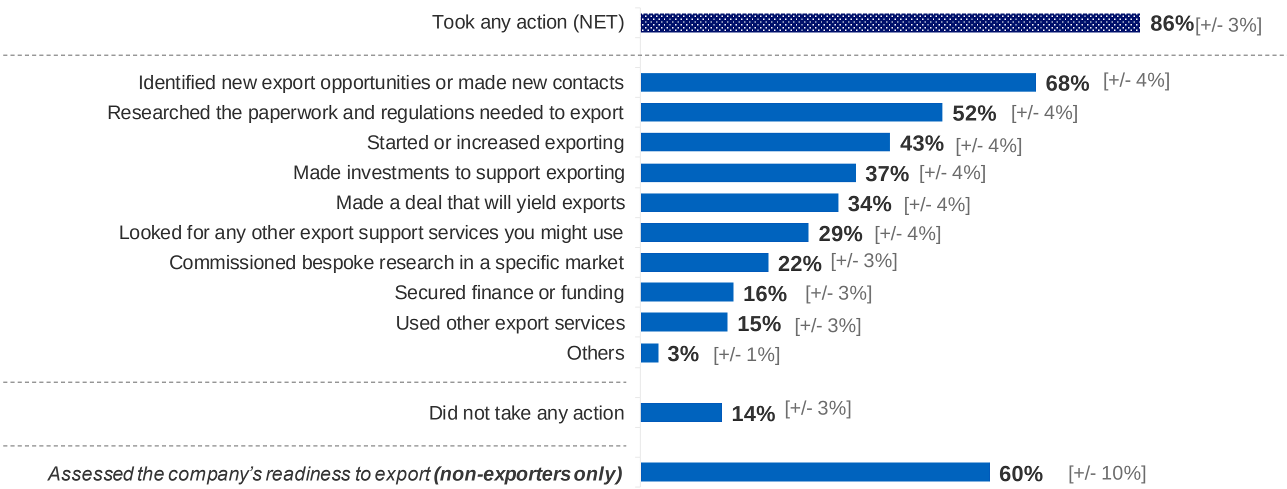
QUKChanges – Which of the following changes have you seen within your UK business as a direct result of ITAs?
Base: All respondents who used ITAs (902)

[45] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.2.10. Actions taken as a result of the service: ITAs

Businesses were asked about the actions they had taken following their use of the ITA service (Chart 3.2.23). Two-thirds (68%) reported they had identified new export opportunities or made new contacts and a half had researched the paperwork and regulations needed to export (52%). Just over two in five said they started or increased exporting (43%). This was higher for those that won any new contracts (55%). Under four in ten made investments to support exporting (37%). Six in ten (60%) of businesses that were not exporting had assessed the company's readiness to export.

Chart 3.2.23 What the business has done as a result of receiving the service - ITAs[46][47]

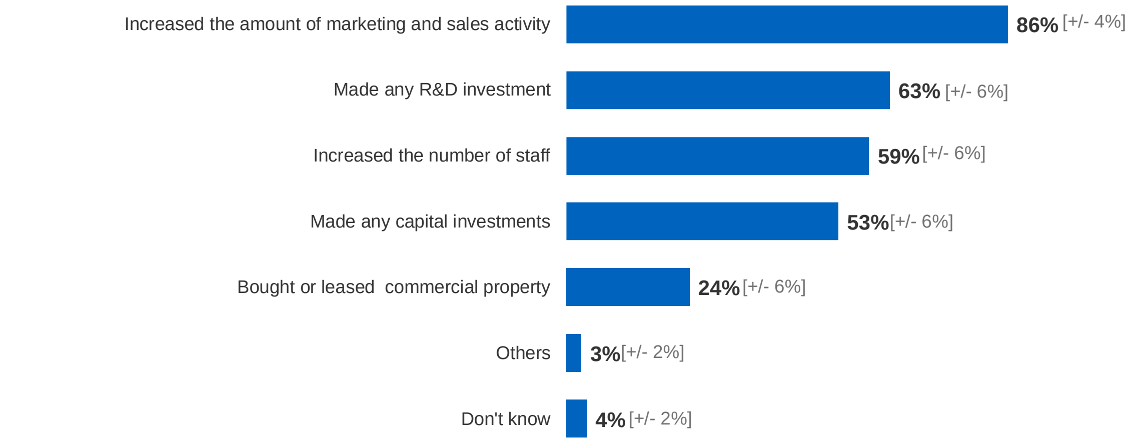


QResultService – What has your business done as a result of [SAMPLED SERVICE]?
Base: All respondents who used ITAs (902). Non-exporters (140).

Businesses that reported they had made an investment as a result of using the ITA service were asked what investments they had made (352 respondents). The most frequent investment was an increase in marketing and sales activity (86%). More than half made R&D investment (63%), increased the number of staff (59%) or made capital investments (53%). About a quarter (24%) bought or leased any commercial property.

[46] The 'Took any action (NET)' groups together all responses from the question apart from responses of 'Did not take any action'.
[47] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

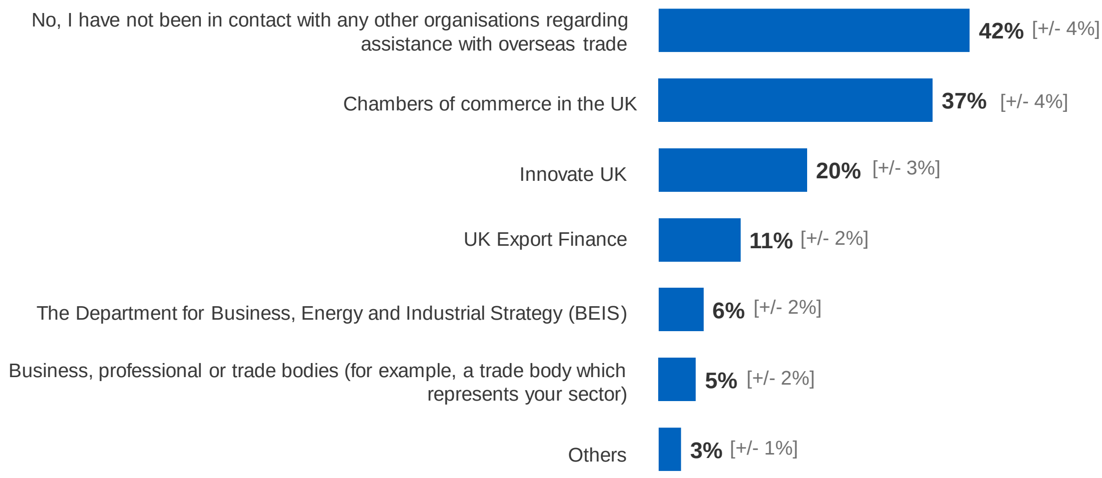
Chart 3.2.24 Type of investments made to support new or increased export opportunities following using ITAs[48][49]



QInvestmentMade - Which of the following investments has your business made to support new or increased export opportunities?
Base: All respondents who made investments to support exporting as a result of using ITAs (352)

Businesses were asked what organisations they had been in contact with since using ITAs. Over a third (37%) of businesses had been in contact with the British Chambers of Commerce and two in ten (20%) had been in contact with Innovate UK. One in ten had been in contact with UK Export Finance (11%). Two in five (42%) businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Chart 3.2.25 What organisations respondents have been in contact with since receiving the service - ITAs[50]



QAnyContact – And again, since your business used [SAMPLED SERVICE] in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities?
Base: All respondents who used ITAs (902)

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48 The ‘Any investment made (NET)’ groups together all responses from the question apart from ‘don’t know’ responses.
49 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.
50 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.3. Posts

The Posts service is comprised of a combination of locally engaged and overseas posted staff. This overseas network provides in-depth knowledge of local markets, and access to reliable contacts to enhance UK firms' export competitiveness. They typically lead on export promotion, inward and outward investment, and trade policy overseas on behalf of the UK government. Their work includes developing and delivering a regional trade plan setting out DIT's priorities in key global markets.

3.3.1. Posts: Quality survey summary

These findings are based on interviews with 263 businesses who used the Posts service from April 2018 to March 2019 and participated in both the Quality Survey and Reported Impact Survey.

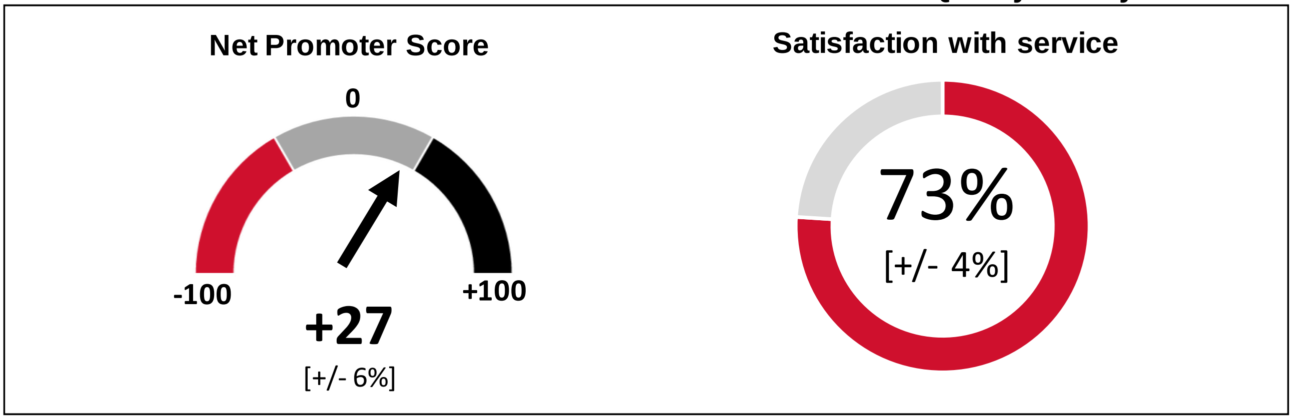
Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=748), as an overview of the businesses' experience of using the Posts service.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own[51]. Half (47%) were 'Promoters' of Posts, while around one in five (20%) were 'Detractors' (score of 0-6) and a three in ten (31%) were neutral (score of 7-8). **Overall, Posts had an NPS of 27.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)[52].

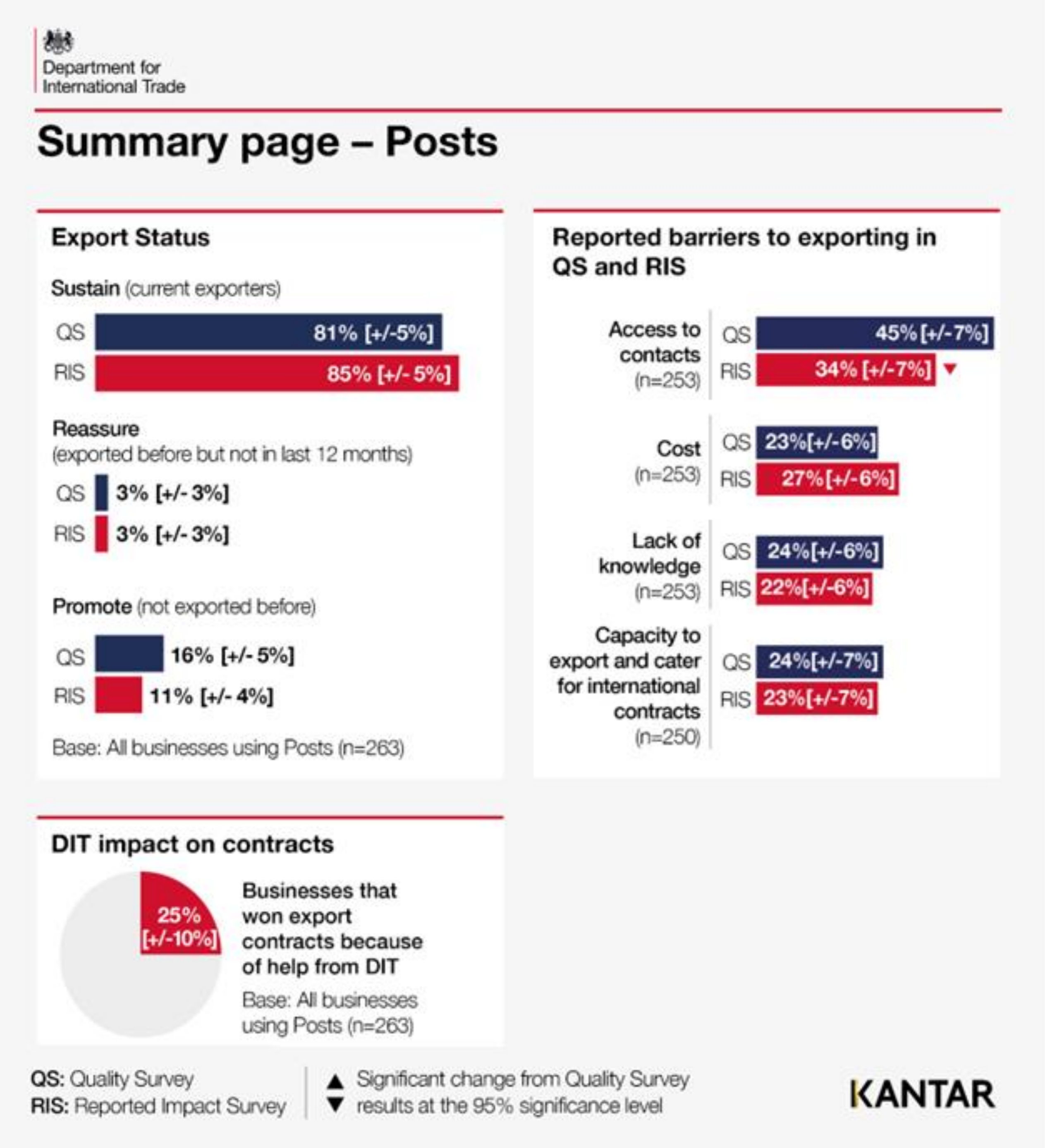
Overall, around three in four businesses (73%) were satisfied with their experience of Posts (giving a rating of 7 or more out of 10), and this included around two in ten businesses (22%) who gave a 'very satisfied' rating (10 out of 10).

Chart 3.3.1 Net Promoter Score and Satisfaction with service from Quality Survey - Posts



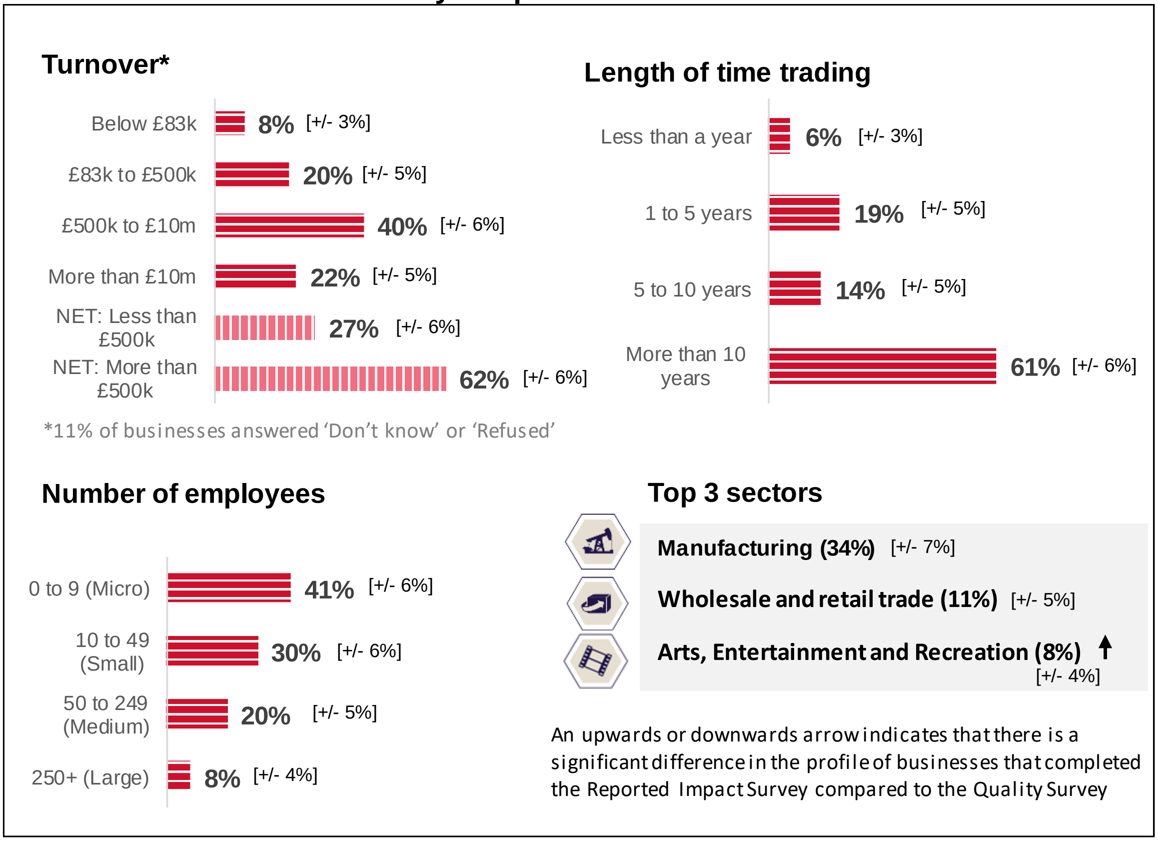
[51] Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.
[52] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.3.2 Key indicators from the RIS survey – Posts



3.3.2. Profile of RIS survey respondents: Posts

Chart 3.3.3 Profile of RIS Survey Respondents[53] – Posts



Reported Impact on exporting

3.3.3. Posts

Businesses that used the Posts service were asked about their export status, both at the time of their interaction with the Posts service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DIT has grouped UK businesses into segments, which reflect businesses' views on their potential to export. These segments include:

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around eight in ten (81%) that used the Posts service fell into this segment at the time of their interaction, compared with 85% 12 months later. This difference is not statistically significant.

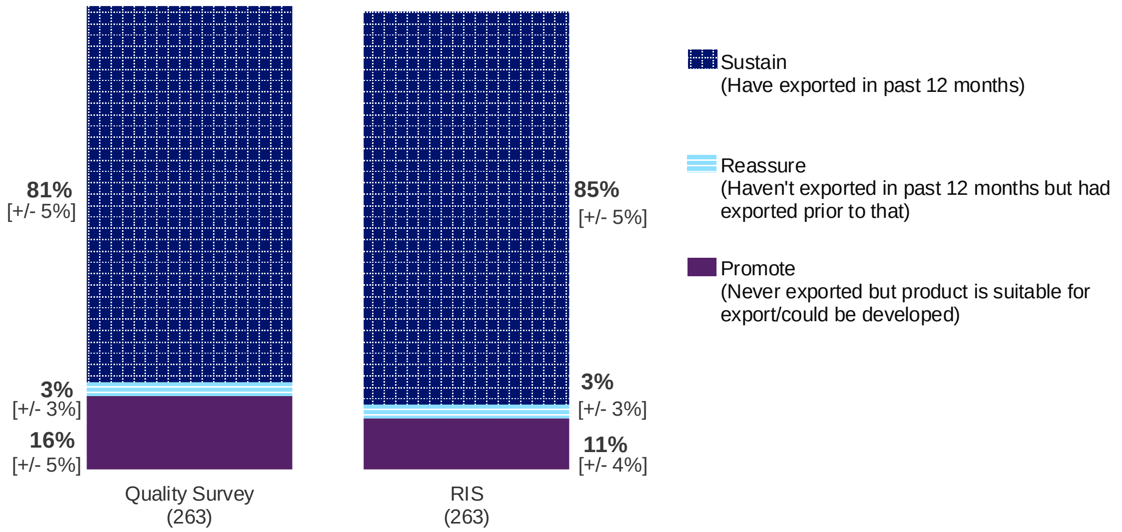
Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Three per cent of businesses that used the Posts service fell into this segment at the time of their interaction and this proportion remained unchanged 12 months after the interaction.

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed

[53] Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

for export. Around one in six (16%) businesses that used the Posts service fell into this segment at the time of their interaction, compared with 11% 12 months later. This difference is not statistically significant.

Chart 3.3.4 Exporter status at time of interaction (Quality Survey) and 12 months later (RIS) - Posts[54]



Source: Composite measure merging data from several variables
Base : All respondents who used Posts and completed RIS: Quality Survey/ RIS (263/263)

The export status of some businesses changed between the time of interaction in the Quality Survey, and 12 months later in the RIS survey (Table 3.3.1). One in twenty businesses (5%) reported that they had moved from Promote to Sustain, that is moved from having never exported to having exported in the past 12 months.

Table 3.3.1 Change in export status at time of interaction (Quality Survey) and 12 months later (RIS) – Posts

Quality Survey Reported Export status n=263	Reported Impact Survey Reported Export Status n=263	Percentage
Sustain, 218 businesses	Sustain, n=210	**96%** [+/- 3%]
Promote, 39 businesses	Moved to Sustain, n=14	**33%** [+/- 15%]
	Promote, n=23	**62%** [+/- 16%]

Source: Composite measure merging data from several variables. Shaded values represent movements not logically possible so may represent respondent error. Data only includes respondents that provided details of their export status in both surveys.

54 Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote

Looking specifically at businesses that were in the Sustain segment (exported in the last 12 months) at the time of the Quality Survey (218 businesses), the majority reported that they had remained in Sustain (96%), whilst two per cent reported that they had moved to Reassure (not exported in the previous 12 months but have previously exported)[55].

3.3.4. Reported Export Contracts Achieved since receiving the service: Posts

Businesses that reported that they had exported were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the Posts service. They were asked to think of all contracts, not just those assisted by the Posts service or DIT.

Of the 85% of businesses that exported (229 businesses), 79% reported that they had won any new overseas business contract and/or had gained extensions to existing overseas business contracts in the year since they used the service. Of the 85% of businesses that exported, more than seven in ten (74%) reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.3.5). Eight per cent had won one overseas contract, and around a third (34%) had won between two and five contracts. At the upper end of the new contract spectrum, around one in seven businesses (15%) reported they had won more than fifteen overseas contracts.

The median number of contracts won among exporting businesses that used the Posts service was three (this is based on the 76% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

More than half (55%) of exporting businesses that used the Posts service reported they had gained extensions to existing overseas business contracts in the year since they used the service. Twelve per cent extended a single contract, a quarter (24%) between two and five, eight per cent between six and ten, and ten per cent extended more than ten existing overseas sales contracts. The highest number of contract extensions for a single firm was 350. More than a third (37%) had not extended any existing contracts.

The median number of contracts extended (including those that did not extend any) was one.

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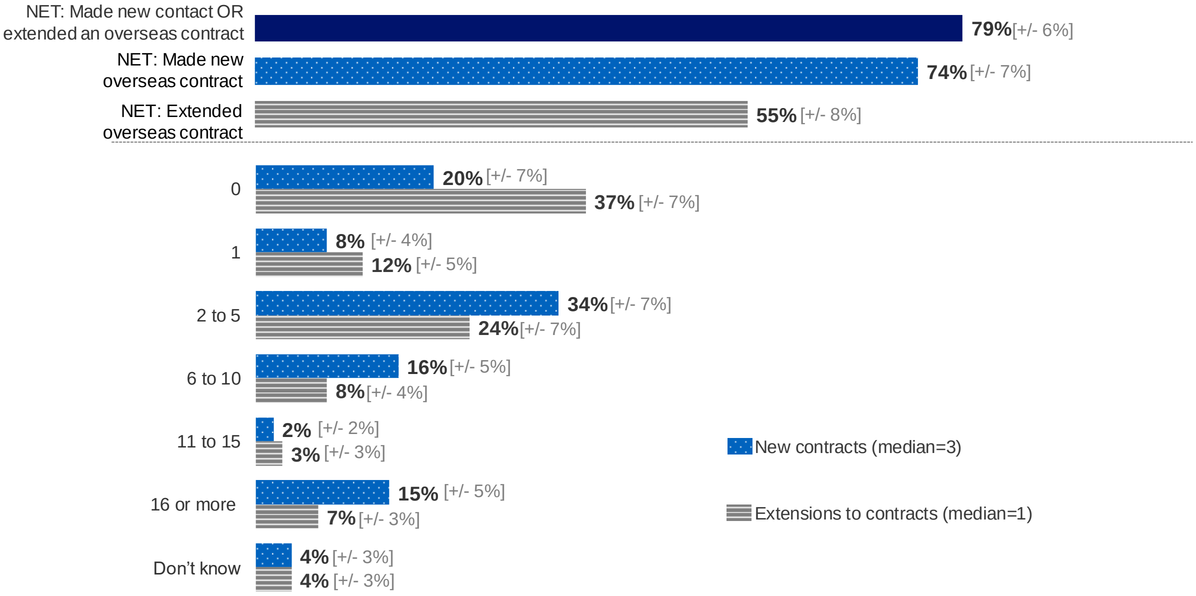
[55] Of the businesses that were in the Sustain segment at the time of the Quality Survey, two per cent reported that they had moved to Promote. This movement is likely to be caused by respondent error when completing the survey.

Chart 3.3.5 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contract made in previous 12 months - Posts[56]



Q_Newcontract– Firstly, how many new overseas business contracts for export sales did you win in the past year?
Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
Base: All respondents who used Posts and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (229)

Reported additional contracts which were gained because of DIT support - Posts

Looking at all businesses that used Posts (including those that were not currently exporting and those that did not win any contracts or contract extensions), a quarter (25%) said they won contracts with the assistance of the Posts service or DIT[57], while a third (35%) won one or more contracts but did not feel that DIT played any role in this, and a further one in twenty (5%) were unsure if DIT's support had played a part in winning the contracts (Chart 3.3.6).

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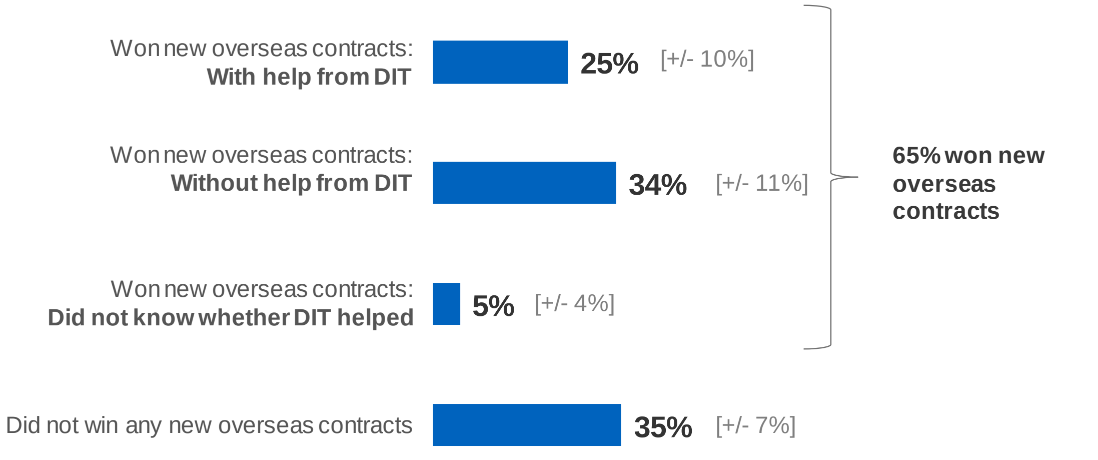
56 The total percentage of all responses for this question add up to above 100 per cent because of rounding.
57 Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.3.6 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – Posts



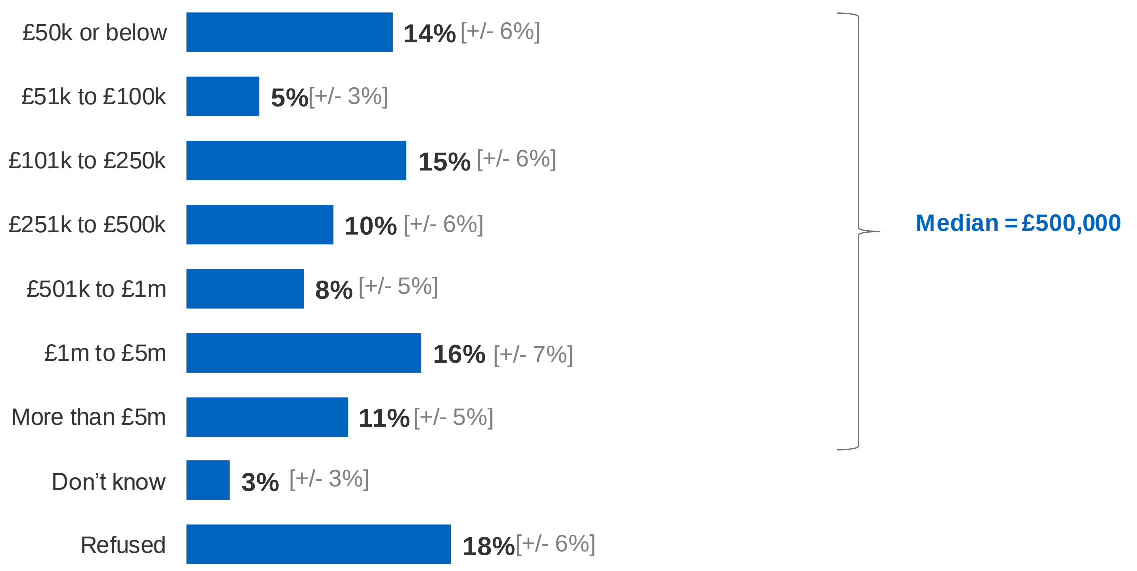
Base: All respondents who used Posts (263)

3.3.5. Reported value of export sales achieved since receiving the service: Posts

Reported value of the export sales of new contracts - Posts

The 65% of exporters that reported winning any new overseas contracts (excluding extensions to existing contracts) were asked the value of the export sales of those contracts in total (Chart 3.3.7). The median value of the export sales of all new overseas contracts for these businesses was £500,000. One in five (19%) won contracts with export sales value of £100,000 or less. A quarter (27%) said that the value of the newly won overseas contracts was worth £1 million or more.

Chart 3.3.7 Value of all new overseas contracts made in previous 12 months – Posts



QcontractValue – What is the value of all these new overseas business contracts for export sales?
Base: All respondents who used Posts and won any new overseas sales contracts (171)

3.3.6. Summary of reported impact as a result of DIT support: Posts

This section summarises the analysis on reported additional impact which aims to estimate the additional impact that DIT services had on businesses. This impact would not have happened without DIT's support.

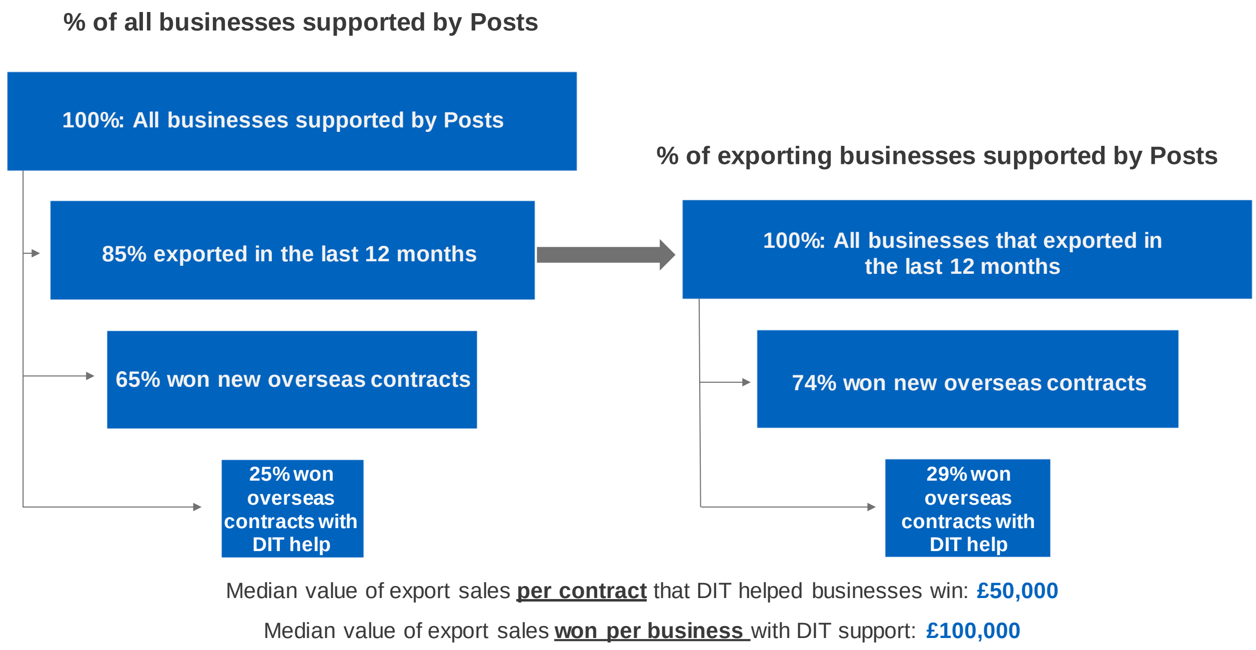
Looking at all businesses supported by Posts interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), more than eight in ten (85%) were exporters, meaning they were exporting at the time of service use or in the last 12 months.

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this[58].

Overall, a quarter (25%) of all Posts service users reported that they had won at least one new contract and attributed DIT with some role in this. Amongst service users who were already exporters, three in ten (29%) reported winning a new contract with input from DIT.

[58] The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

Chart 3.3.8 Summary of businesses supported by Posts [59]



Base: All respondents who used Posts (263)

3.3.7. Exposure and growth within new markets: Posts

All businesses that used Posts were asked whether they received increased exposure or started doing business in any new markets because of their interaction with Posts [60]. Twelve per cent had been exposed to at least one new market and the same proportion (12%) had started doing business in at least one new market as a result of using the Posts service[61].

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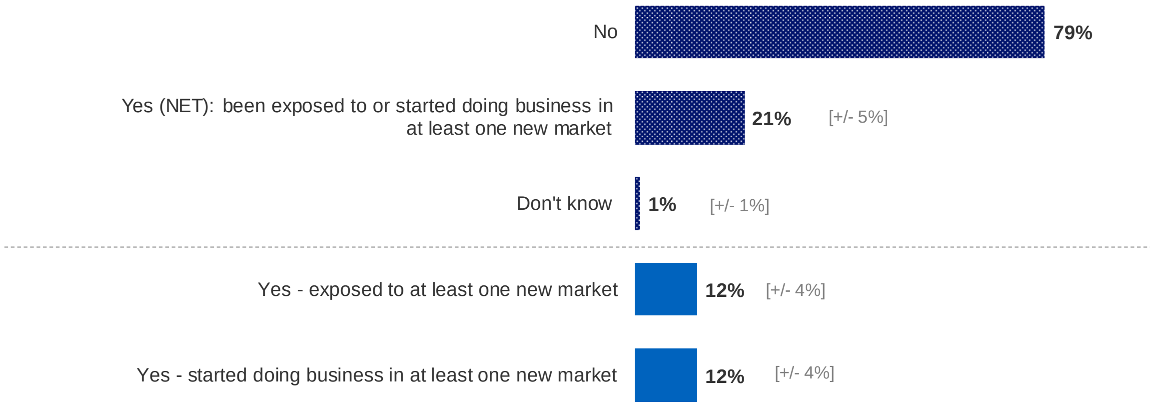
[59] In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 39% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so 39% * 65% = 25%. Find more information about how this was calculated in the technical report.

[60] Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

Chart 3.3.9 Whether increased exposure or starting business in a new overseas market - Posts



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SAMPLED SERVICE]?
Base: All respondents who used Posts (263)

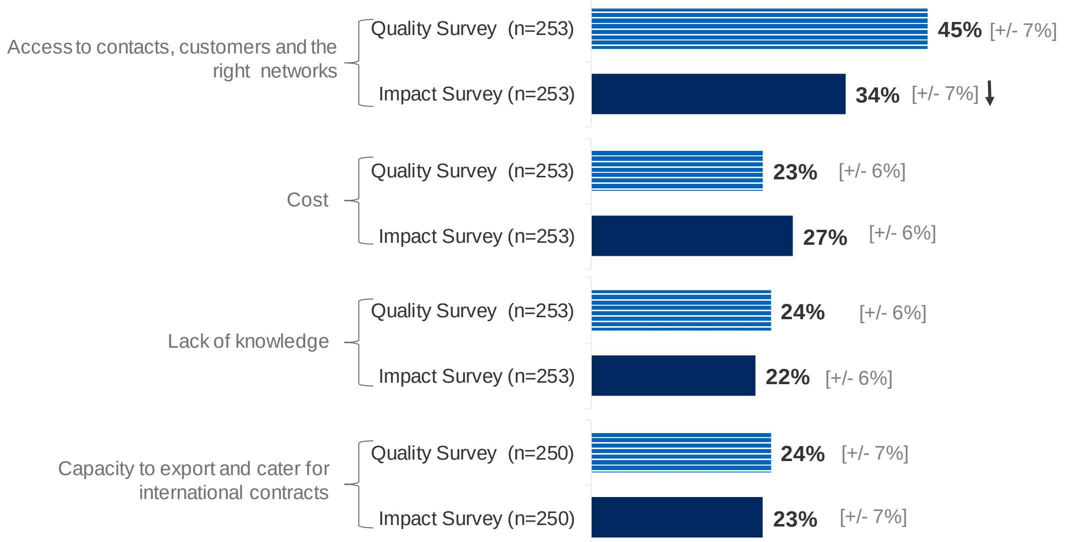
3.3.8. Barriers to exporting: Posts

Businesses were asked in both the Quality Survey and Reported Impact Survey about some **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 0 (not a barrier at all). This section compares results from between surveys for businesses who completed both surveys and provided a response to this question in both surveys[62].

The proportion of businesses that said ‘access to contacts, customers and the right networks’ was a barrier to exporting (rating 7 to 10 out of 10) significantly decreased between the Quality Survey and RIS. There were no significant changes in the proportion of businesses that said ‘cost’, ‘lack of knowledge’ or ‘capacity’ were barriers to exporting (Chart 3.3.10).

[62] Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.3.10 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys - Posts[63]



Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents who used Posts except those giving a 'not applicable' answer

3.3.9. Wider benefits of service: Posts

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market, using a similar rating scale as above. Confidence building was more widespread when it came to exporting to new markets rather than existing markets. More than a third (36%) reported that the Posts service improved their confidence in exporting to new markets, compared with around a quarter (26%) reporting that the service helped to improve their confidence in exporting to existing markets.

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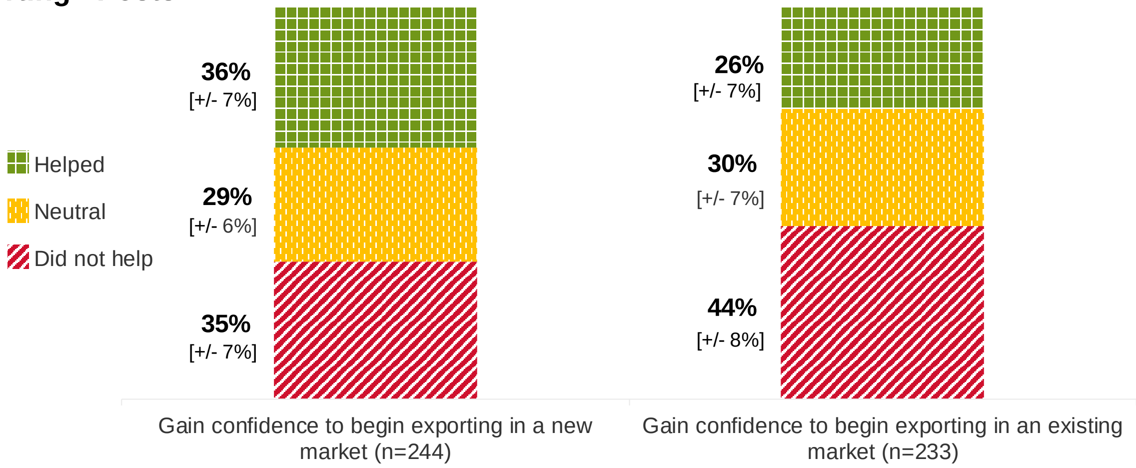
[63] The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Chart 3.3.11 To what extent experience of the service helped to build confidence in exporting - Posts

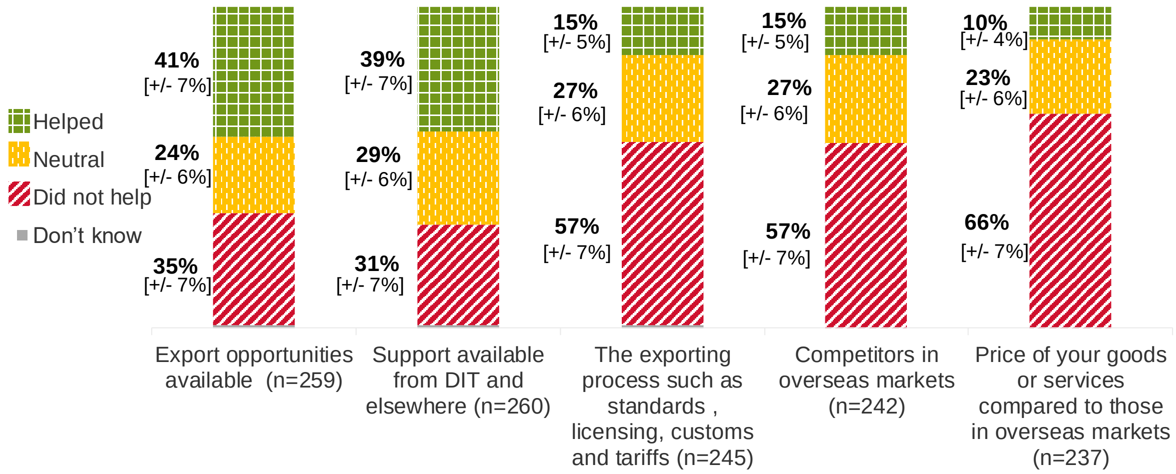


QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of [SAMPLED SERVICE] help you to?
Base: All respondents who used Posts except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.3.12 shows the items that were asked of businesses that used Posts. This shows that:

- Four in ten (41%) businesses that had used the Posts service said it had helped to increase their knowledge of the export opportunities available, while a third (35%) said the service did not help them in this way.
- There was also a positive balance in terms of improving knowledge of the support available from DIT and elsewhere. Around four in ten (39%) service users reported that the Posts service had helped with their knowledge of the support available, while three in ten (31%) said the service did not help them in this way.
- Businesses were much less likely to report that the Posts service had helped them with specifics of exporting, including exporting process aspects such as standards, licensing, customs and tariffs (15% reported the service had helped). The same applied to improving knowledge of competitors in overseas markets where, again, 15% agreed that the Post service had helped with this.
- One in ten (10%) agreed that the Posts service had helped increase their knowledge of the price of their goods or services compared with those in overseas markets.

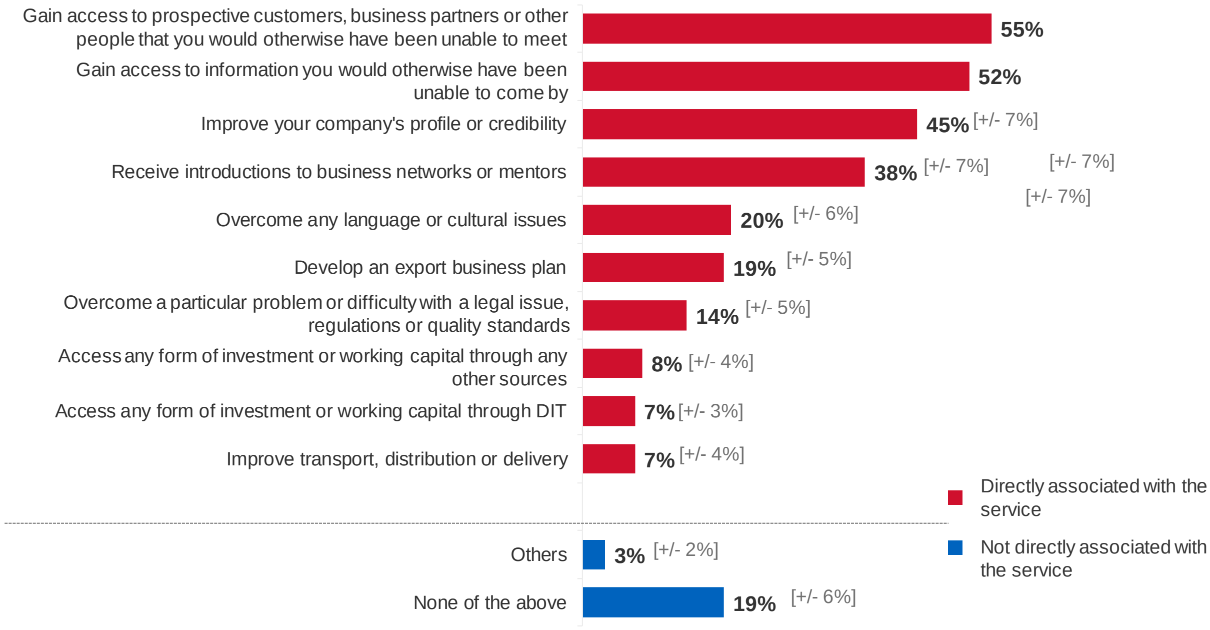
Chart 3.3.12 To what extent the business felt it has improved its knowledge as a result of using the service - Posts



QImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of [SAMPLED SERVICE]?
Base: All respondents who used Posts except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using the Posts service in the year between dealing with Posts and the RIS interview. A detailed breakdown of responses is shown in Chart 3.3.13, where activities in red show those most closely associated with the service. Of the activities most associated with the service, the most frequent responses from a pre-coded list were to gain access to prospective customers, business partners or other people they would otherwise have been unable to meet (55%) and to gain access to information that they would otherwise have been unable to come by (52%). Improving the company's profile or credibility was also widely cited (45%). Around four in ten (38%) mentioned receiving introductions to business networks or mentors as a benefit.

Chart 3.3.13 In what ways has the business felt it had benefited from DIT support - Posts[64]

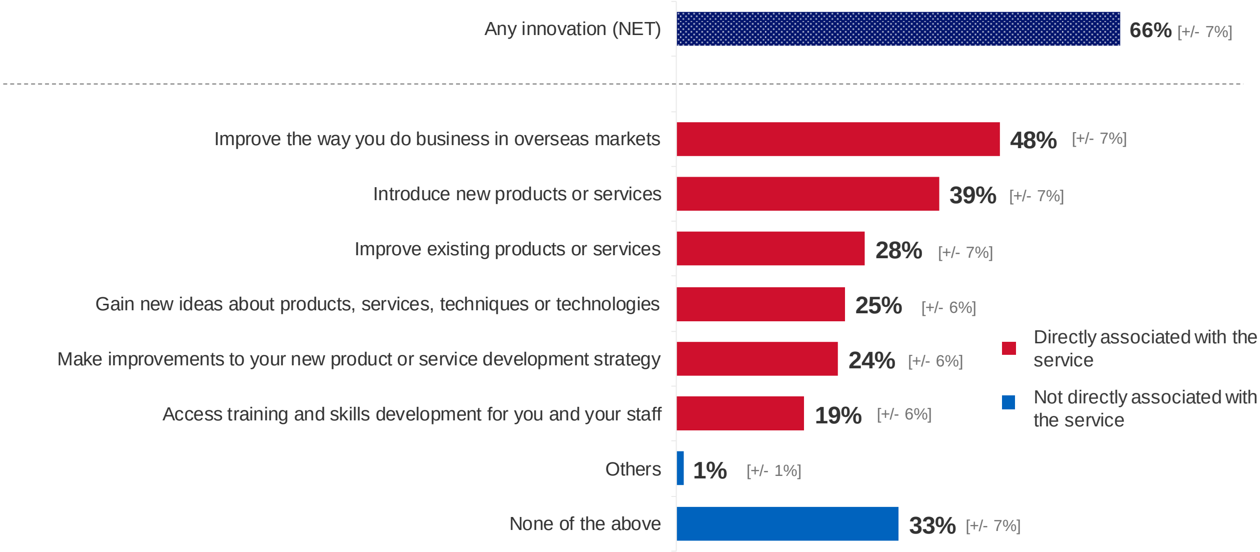


QServiceBenefit – In which of the following ways if any, has your business benefited specifically from [SAMPLED SERVICE] over the last year?
Base: All respondents who used Posts (263)

Businesses were asked whether using the Posts service has helped, or will help, support innovation and development as a business. Two-thirds (66%) said that using the service helped them with innovation or development in some form. Answer codes in red show those most closely associated with the service. The most common response was to 'improve the way you do business in overseas markets' (48%). Four in ten (39%) mentioned that using the Posts service helped them to introduce new products or services and around three in ten (28%) said it helped them to improve existing products or services. A quarter (25%) said that the service helped them to gain new ideas about products, services, techniques or technologies.

64 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.3.14 Whether the service has / will help innovation and development - Posts[65] [66]



QInnovationSupport – Still thinking of [SAMPLED SERVICE], has this service helped or do you expect it to help your business with development and/or innovation? Specifically…
Base: All respondents who used Posts (263)

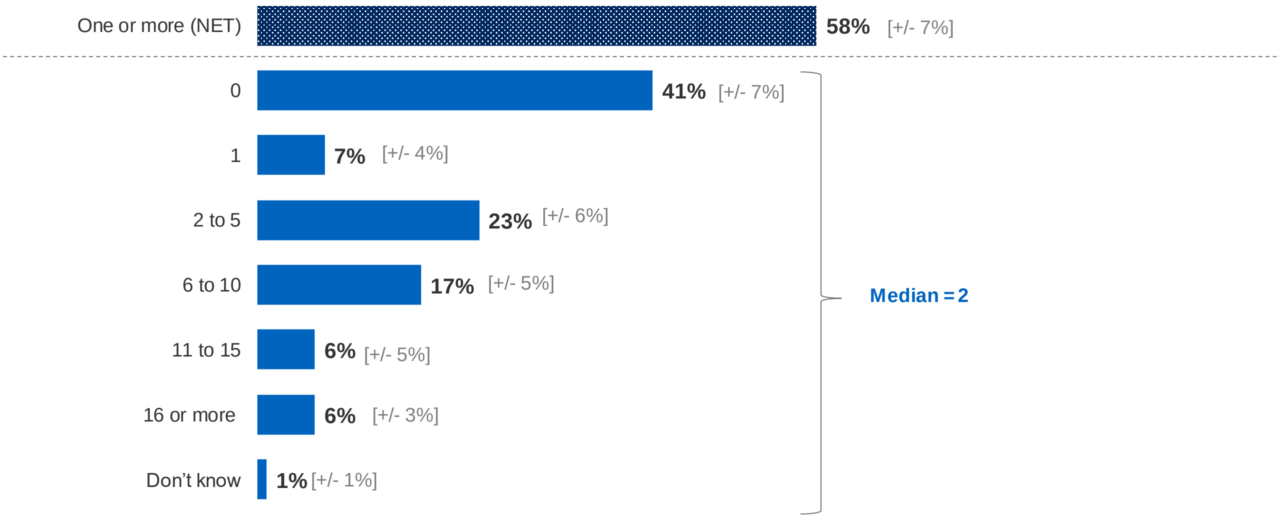
International contacts

Businesses were asked how many overseas contacts they had made as a result of using the Posts service over the past year (Chart 3.3.15). Six in ten (58%) businesses made at least one new overseas contact in the year since using the Posts service.

Seven per cent made one new overseas contact, and around a quarter (23%) made between two and five new contacts. One in six businesses (17%) made between six and ten new overseas contacts, and one in nine (11%) made more than ten new contacts. Four in ten (41%) reported that they had not made any new contacts as a result of using the Posts service.

[65] The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.
[66] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

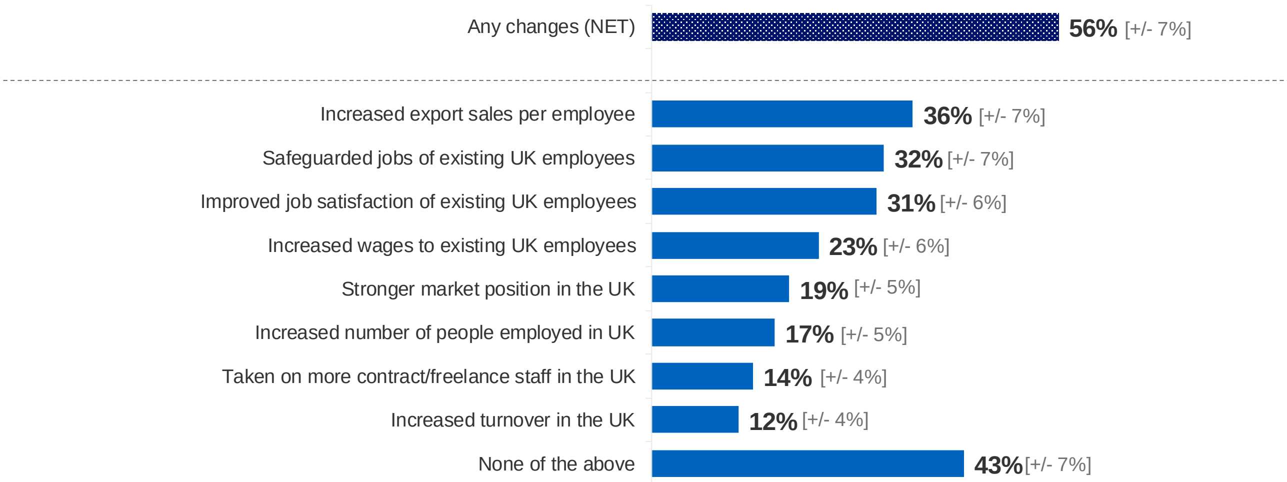
Chart 3.3.15 Number of new overseas contacts made in previous 12 months - Posts



Q_ContactsMade –How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
Base: All respondents who used Posts (263)

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Posts service (Chart 3.3.16). Just over a third of users said they thought using Posts had, or would, increase export sales per employee (36%) and a third said their receipt of the service would safeguard jobs in the UK (32%). Three in ten (31%) reported that the Posts service had improved the job satisfaction of existing UK employees, while a quarter (23%) reported their use of the service had increased wages to existing UK employees. One in five (19%) felt the service had strengthened their market position in the UK.

Chart 3.3.16 Changes expected / seen in the UK business as a result of receiving the service - Posts[67]



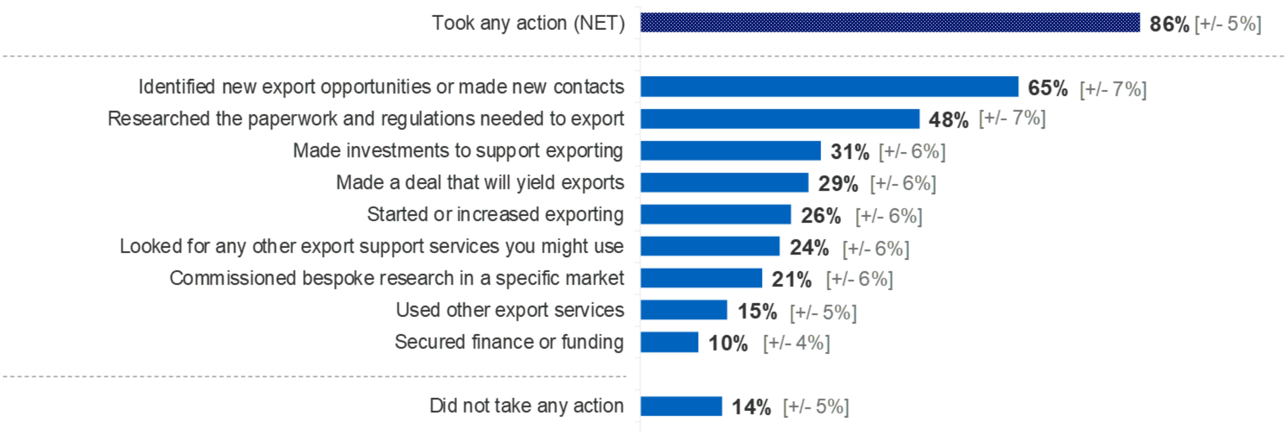
QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
Base: All respondents who used Posts (263)

[67] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.3.10. Actions taken as a result of the service: Posts

Businesses were asked about the actions they had taken following their use of the Posts service (Chart 3.3.17). Two-thirds (65%) of Posts users reported that they had identified new export opportunities or made new contacts and half had researched the paperwork and regulations needed to export (48%). Three in ten had made investments to support exporting (31%) and a similar proportion had made a deal that will yield exports (29%). A quarter reported that they had started or increased exporting (26%).

Chart 3.3.17 What the business has done as a result of receiving the service - Posts[68, 69]



QResultService - What has your business done as a result of [SAMPLED SERVICE]? Base: All respondents who used Posts (263). The net score also includes non-exporters who assessed their readiness to export.

Businesses were also asked what organisations they had been in contact with since using Posts. Four in ten businesses had been in touch with the Chambers of Commerce in the UK (38%). Other public bodies such as Innovate UK (18%), UK Export Finance (10%), or the Department for Business, Energy and Industrial Strategy (8%) were also cited. One in twenty (5%) had been in contact with a business, professional or trade body.

Four in ten (39%) had not been in contact with any other organisations regarding assistance with overseas trade.

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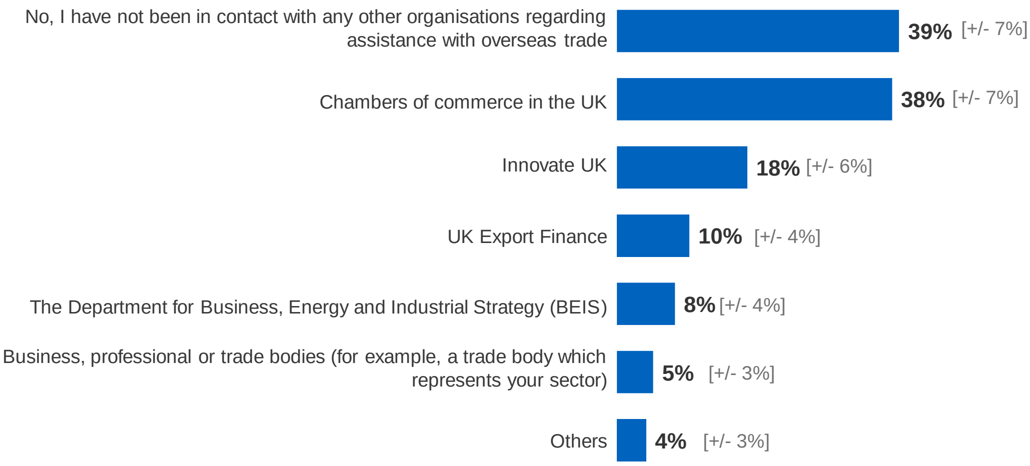
[68] The 'Took any action (NET)' groups together all responses from the question apart from responses of 'Did not take any action'.

[69] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.3.18 What organisations respondents have been in contact with since receiving the service - Posts[70]



QAnyContact – And again, since your business used [SAMPLED SERVICE] in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities?
Base: All respondents who used Posts (263)

70 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.4. Sector Teams

The Sector Teams service is delivered by an Embassy or consulate, the Foreign Office, or a Trade Association and could involve DIT directly. It also includes information or assistance from staff at a British Embassy or consulate.

3.4.1. Sector Teams: Quality survey summary

These findings are based on interviews with 197 businesses who used the Sector Teams service from April 2018 to March 2019 and participated in both the Quality Survey and Reported Impact Survey.

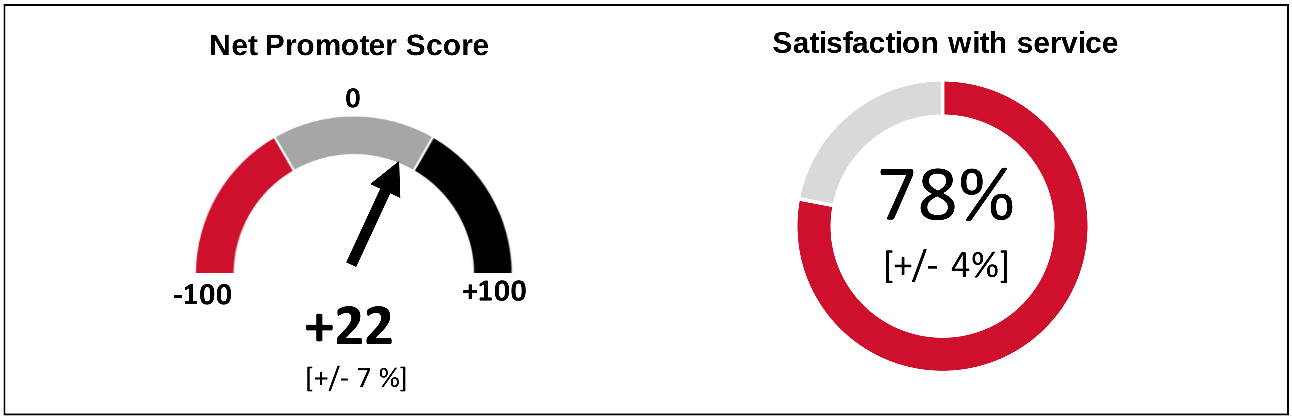
Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=522), as an overview of the businesses' experience of using the Sector Teams service.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own[71]. Just under half (41%) were 'Promoters' of Sector Teams, while just under one in five (18%) were 'Detractors' (score of 0-6) and around a third (37%) were neutral (score of 7-8). **Overall, Sector Teams had an NPS of 22.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)[72].

Overall, around four in five businesses (78%) were satisfied with their experience of Sector Teams (giving a rating of 7 or more out of 10), and this included around two in ten businesses (18%) who gave a 'very satisfied' rating (10 out of 10).

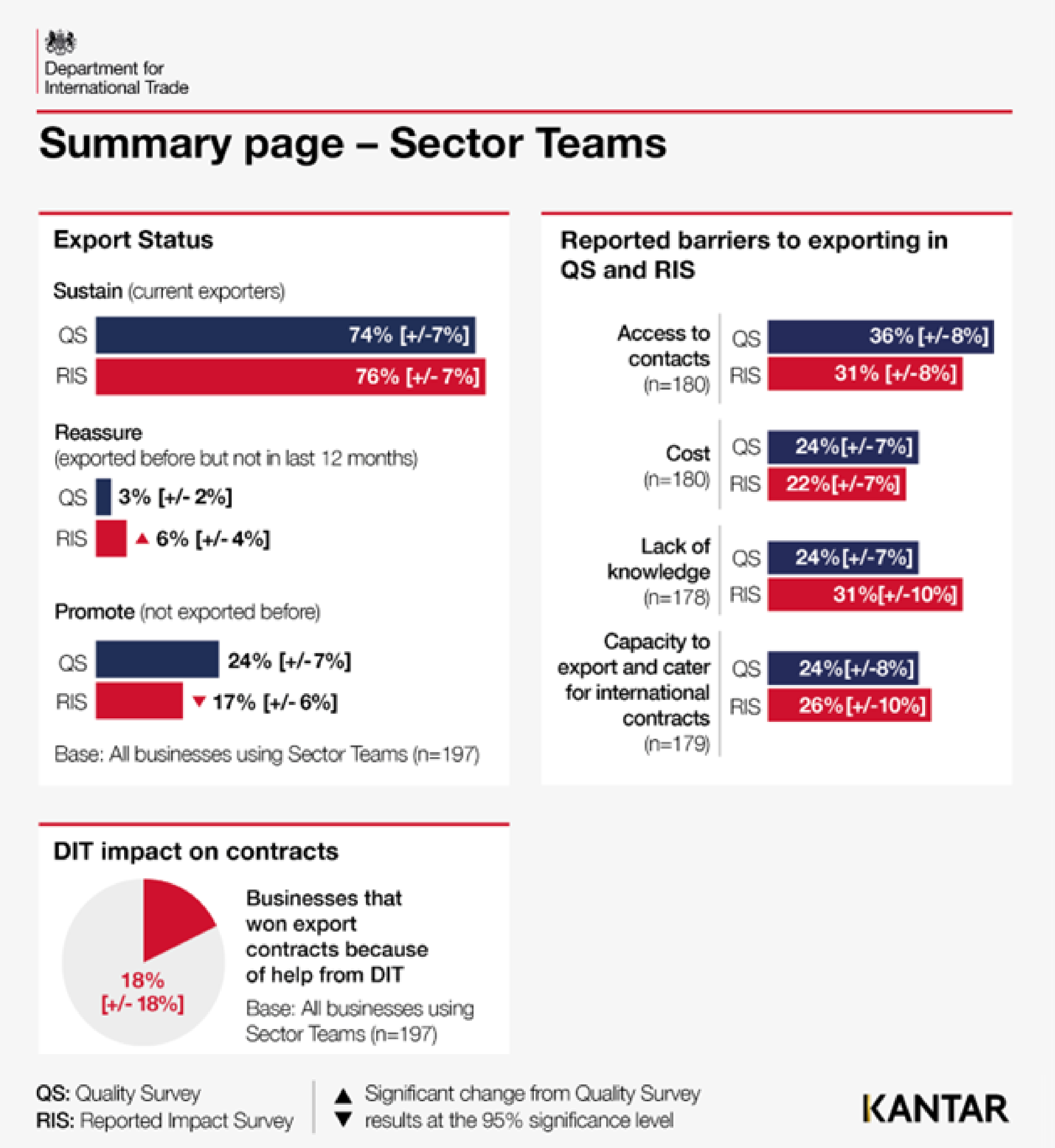
Chart 3.4.1 Net Promoter Score and Satisfaction with service from Quality Survey - Sector Teams



[71] Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.

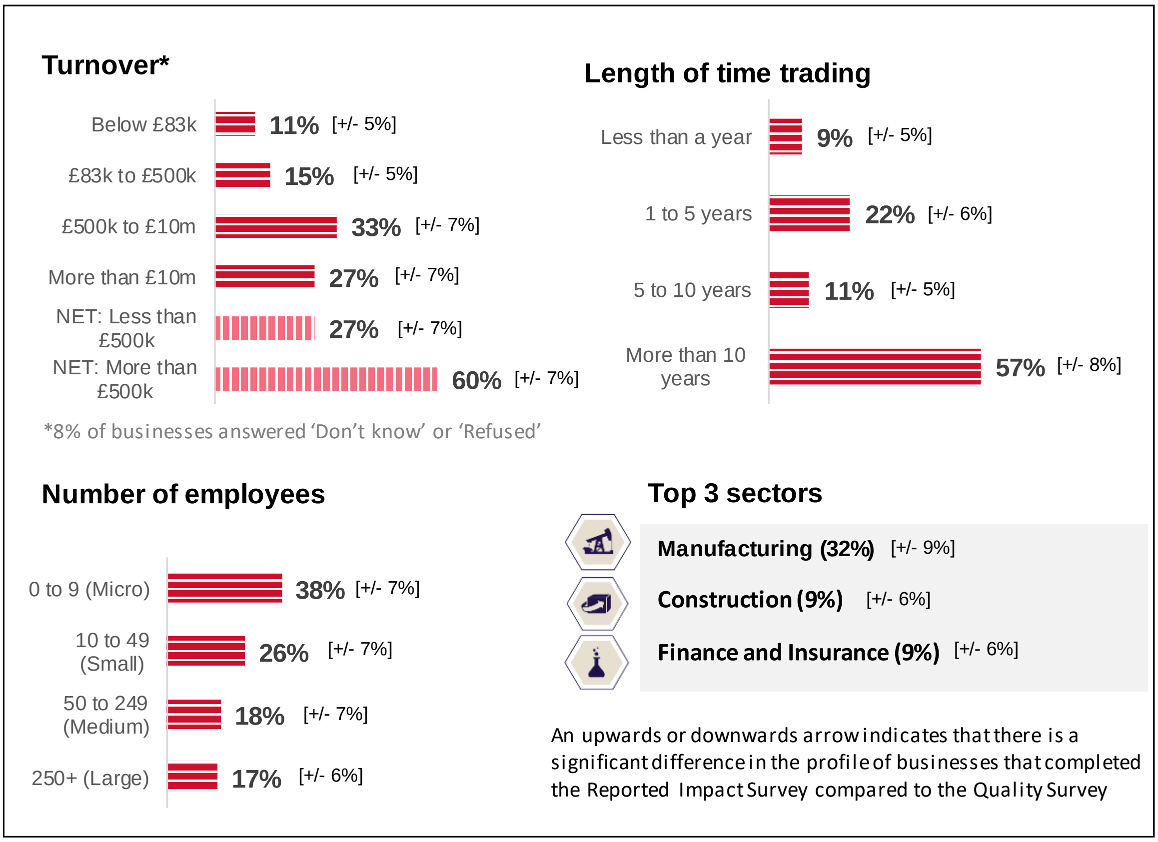
[72] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.4.2 Key indicators from the RIS survey – Sector Teams



3.4.2. Profile of RIS survey respondents: Sector Teams

Chart 3.4.3 Profile of RIS Survey Respondents[73] – Sector Teams



Reported Impact on exporting

3.4.3. Sector Teams

Businesses that used the Sector Teams service were asked about their export status, both at the time of their interaction with the Sector Teams service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DIT has grouped UK businesses into segments, which reflect businesses' views on their potential to export. These segments include:

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around three-quarters (74%) that used the Sector Teams service fell into this segment at the time of their interaction, compared with 76% 12 months later. This difference is not statistically significant.

Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Three per cent of businesses that used the Sector Teams service fell into this segment at the time of their interaction while six per cent fell into this category 12 months after the interaction. **Promote:** refers to self-identified

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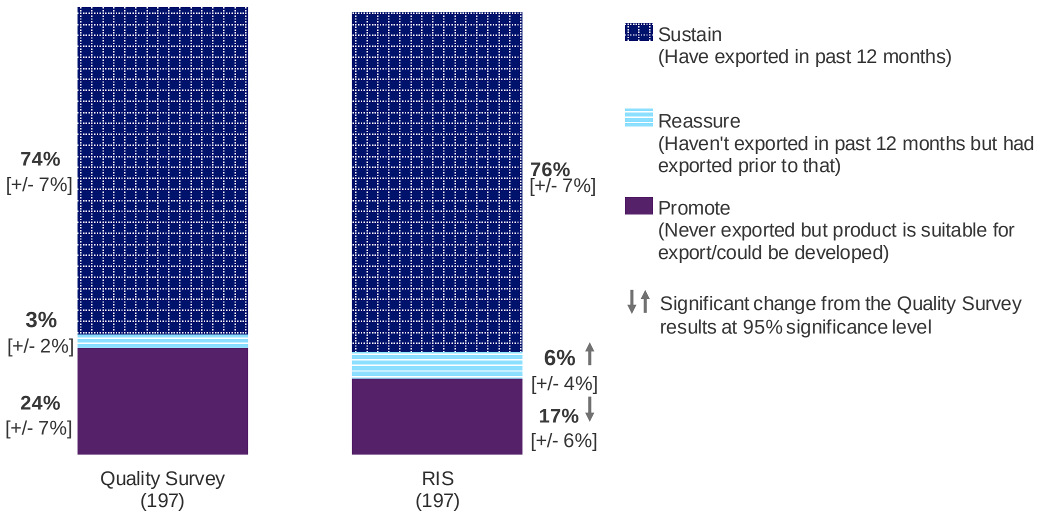
[73] Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. A quarter (24%) businesses that used the Sector Teams service fell into this segment at the time of their interaction, compared with 17 per cent 12 months later.

Chart 3.4.4 Exporter status at time of interaction (Quality Survey) and 12 months later (RIS) - Sector Teams[74]



Source: Composite measure merging data from several variables
Base : All respondents that completed RIS: Quality Survey/ RIS (197/197)

The export status of some businesses changed between the time of interaction in the Quality Survey, and 12 months later in the RIS survey (Table 3.4.1). Around one in twelve (8%) businesses reported that they had moved from Promote to Sustain, that is moved from having never exported to having exported in the past 12 months.

Table 3.4.1 Change in export status at time of interaction (Quality Survey) and 12 months later (RIS) – Sector Teams

Quality Survey Reported Export status n=197	Reported Impact Survey Reported Export Status n=197	Percentage
Sustain, 151 businesses	Sustain, n=140	**92%** [+/- 5%]
Promote, 41 businesses	Moved to Sustain, n=15	**32%** [+/- 15%]
	Promote, n=21	**54%** [+/- 17%]

74 Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote

Source: Composite measure merging data from several variables. Shaded values represent movements not logically possible so may represent respondent error. Data only includes respondents that provided details of their export status in both surveys.

3.4.4. Reported Export Contracts Achieved since receiving the service: Sector Teams

Businesses that reported they had exported were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the Sector Teams service. They were asked to think of all contracts, not just those assisted by the Sector Teams service or DIT.

Of the 76% of businesses that exported (157 businesses), 84% reported that they had won any new overseas business contract and/or had gained extensions to existing overseas business contracts in the year since they used the service.

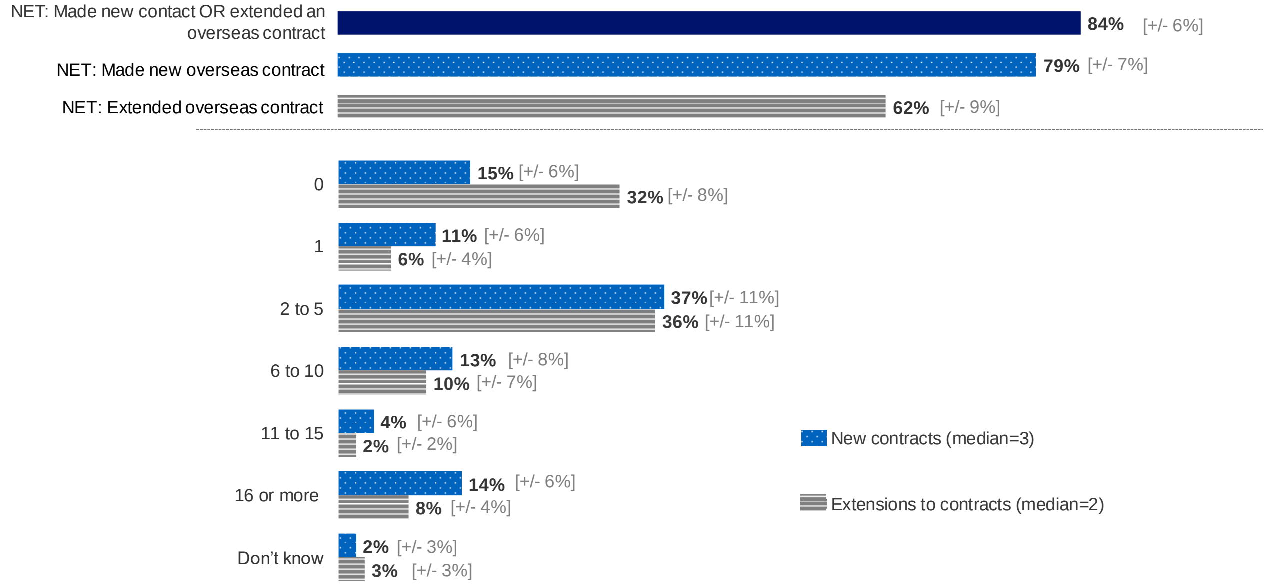
Of the 76% of businesses that exported, eight in ten (79%) reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.4.5). Eleven per cent had won one overseas contract, and more than a third (37%) had won between two and five contracts. At the upper end of the new contract spectrum, around one in seven businesses (14%) had won more than fifteen overseas contracts.

The median number of contracts won among exporting businesses that used the Sector Teams service was three (this is based on the 66% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

Six in ten (62%) of exporting businesses that used the Sector Teams service reported they had gained extensions to existing overseas business contracts in the year since they used the service. Six per cent extended a single contract, around a third (36%) between two and five, one in ten (10%) between six and ten, and a further nine per cent extended more than ten existing overseas sales contracts. The highest number of contract extensions for a single firm was 100. A third (32%) had not extended any existing contracts.

The median number of contracts extended (including those that did not extend any) was two.

Chart 3.4.5 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contract made in previous 12 months - Sector Teams[75]



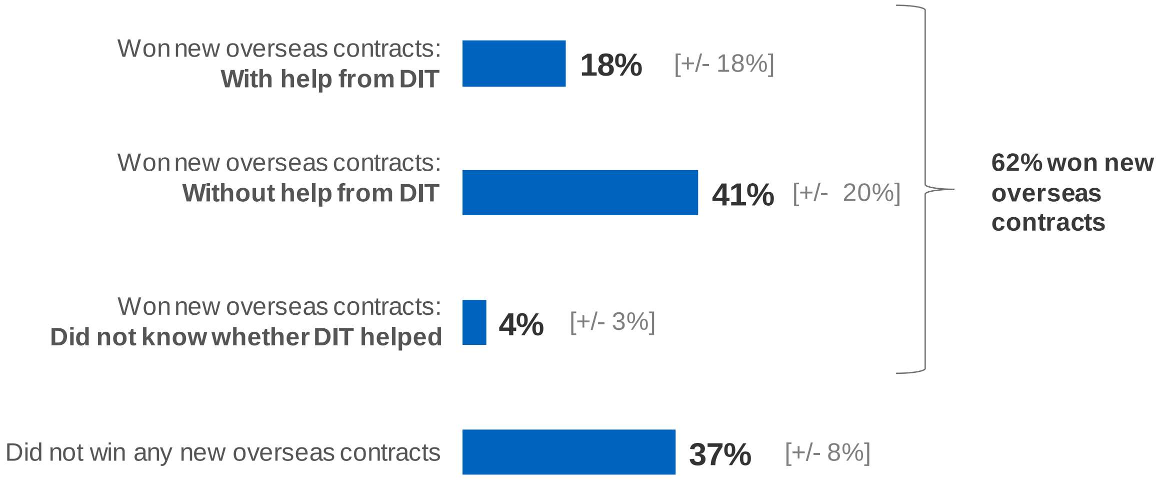
Q_Newcontract– Firstly, how many new overseas business contracts for export sales did you win in the past year?
Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
Base: All respondents that were currently selling, or had previously sold, goods or services overseas in the previous 12 months (157)

Reported additional contracts which were gained because of DIT support - Sector Teams

Looking at all businesses that used Sector Teams (including those that were not currently exporting and those that did not win any contracts or contract extensions), around one in five (18%) said they won contracts with the assistance of the Sector Teams service or DIT[76], while four in ten (41%) won one or more contracts but did not feel that DIT played any role in this, and a further four per cent were not able to say if DIT's support had played a part in winning the contracts (Chart 3.4.6).

[75] The total percentage of all responses for this question add up to above 100 per cent because of rounding.
[76] Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.4.6 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – Sector Teams



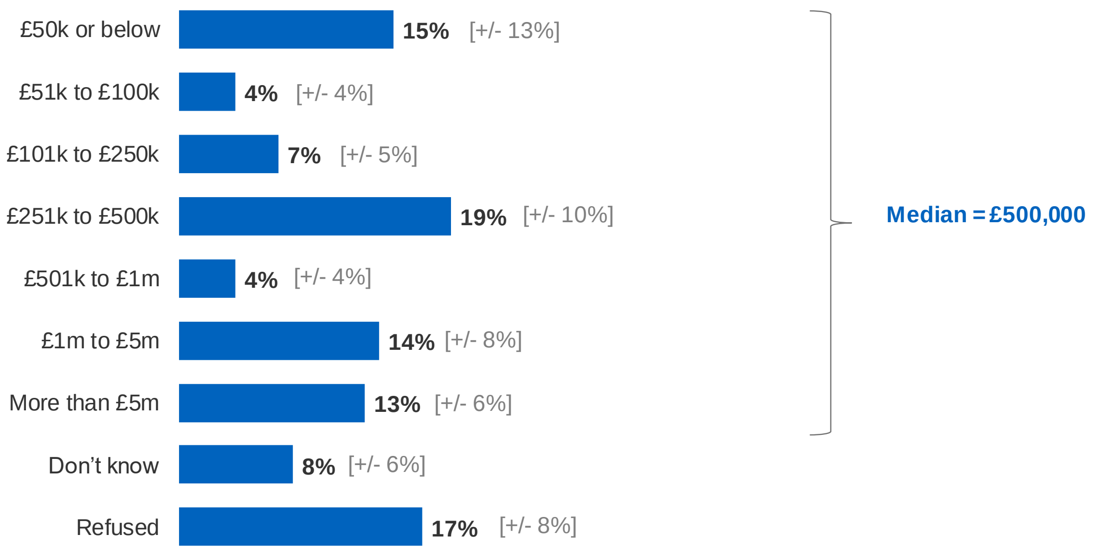
Base: All respondents who used Sector Teams (197)

3.4.5. Reported value of export sales achieved since receiving the service: Sector Teams

Reported value of the export sales of new contracts - Sector Teams

The 62% of exporters that reported winning any new overseas contracts (excluding extensions to existing contracts) were asked the value of the export sales of those contracts in total (Chart 3.4.7). The median value of the export sales of all new overseas contracts for these businesses was £500,000. One in five (19%) won contracts with export sales value of £100,000 or less. A quarter (27%) said that the value of the newly won overseas contracts was worth £1 million or more.

Chart 3.4.7 Value of all new overseas contracts made in previous 12 months - Sector Teams



QcontractValue – What is the value of all these new overseas business contracts for export sales?
Base: All respondents that used Sector Teams who won any new overseas sales contracts (122)

3.4.6. Summary of reported impact as a result of DIT support: Sector Teams

This section summarises the analysis on reported additional impact which aims to estimate the additional impact that DIT services had on businesses. This impact would not have happened without DIT's support.

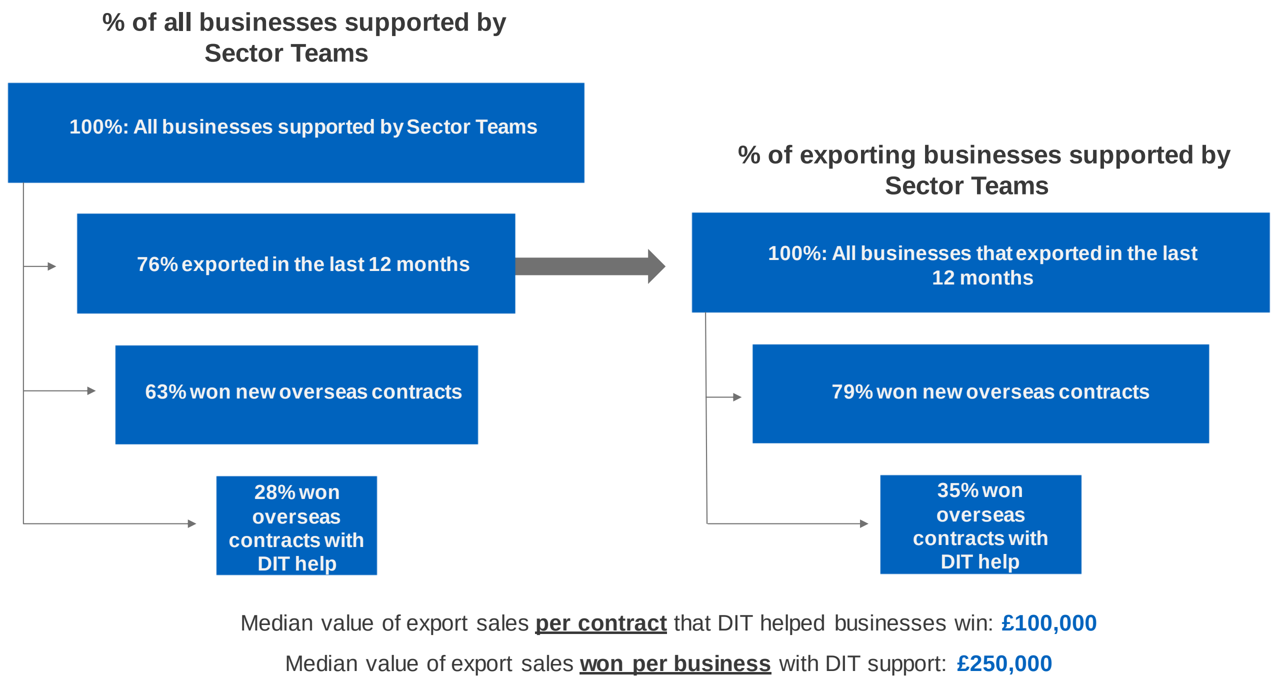
Looking at all businesses supported by Sector Teams interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), three-quarters (76%) were exporters, meaning they were exporting at the time of service use or in the last 12 months.

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this[77].

Overall, around a quarter (28%) of all Sector Teams service users reported that they had won at least one new contract and attributed DIT with some role in this. Amongst service users who were already exporters, around a third (35%) reported winning a new contract with input from DIT.

[77] The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

Chart 3.4.8 Summary of businesses supported by Sector Teams [78]



Base: All respondents who used Sector Teams (197)

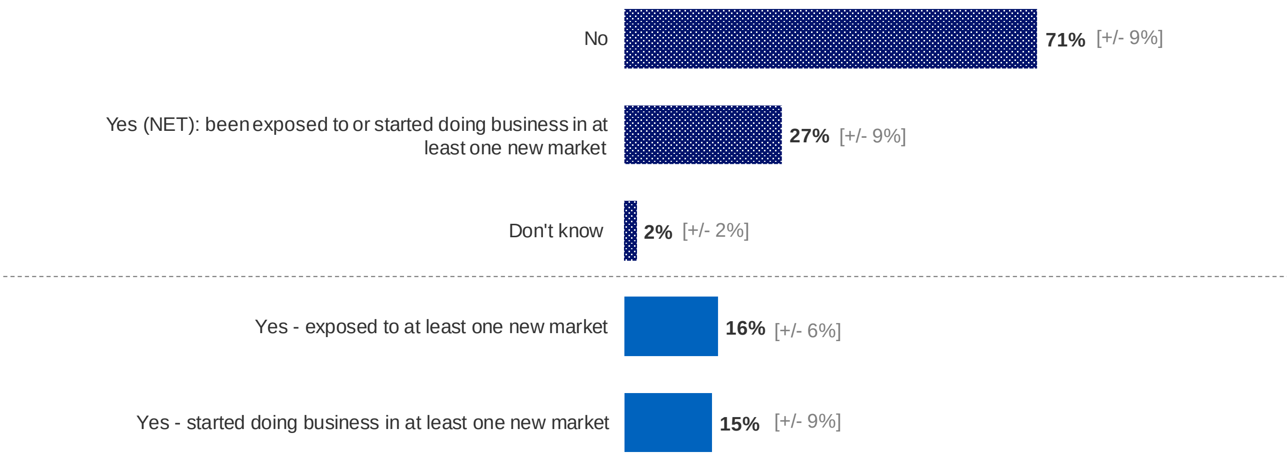
3.4.7. Exposure and growth within new markets: Sector Teams

All businesses that used Sector Teams were asked whether they received increased exposure or started doing business in any new markets because of their interaction with Sector Teams [79]. One in six (16%) had been exposed to at least one new market and the same proportion (15%) had started doing business in at least one new market as a result of using the Sector Teams service[80].

[78] In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 45% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so 45% * 63% = 28%. Find more information about how this was calculated in the technical report.

[79] Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

Chart 3.4.9 Whether increased exposure or starting business in a new overseas market - Sector Teams



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF Sector Teams? Base: All respondents who used Sector Teams (197)

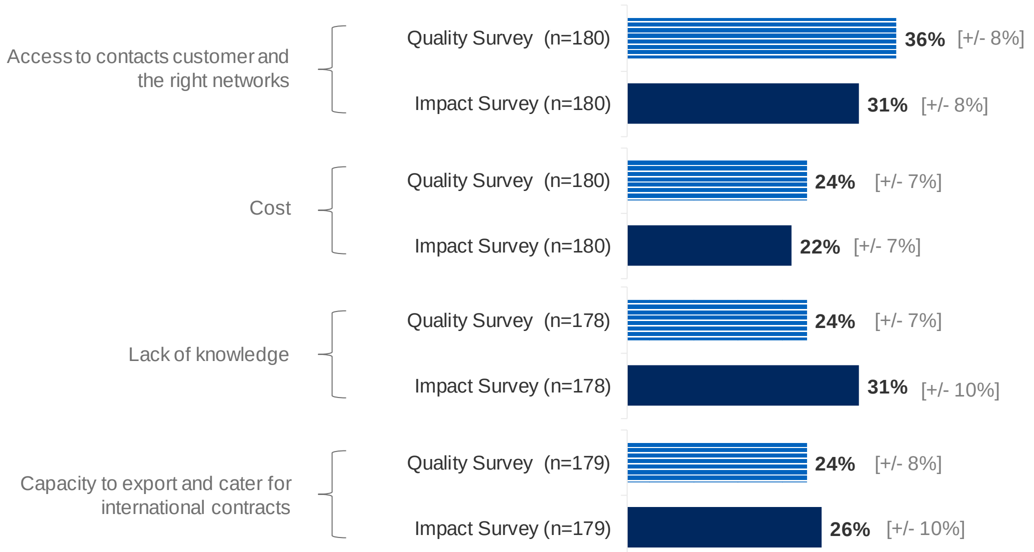
3.4.8. Barriers to exporting: Sector Teams

Businesses were asked in both the Quality Survey and Reported Impact Survey about some **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 0 (not a barrier at all). This section compares results from between surveys for businesses who completed both surveys and provided a response to this question in both surveys[81].

There were no significant changes in the proportion of businesses that said 'access to contacts, customers and the right networks', 'cost', 'lack of knowledge' or 'capacity to export and cater for international contracts' were barriers to exporting (rating of 7 to 10 out to 10) between the Quality Survey and RIS (Chart 3.4.10).

[81] Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.4.10 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys - Sector Teams[82]



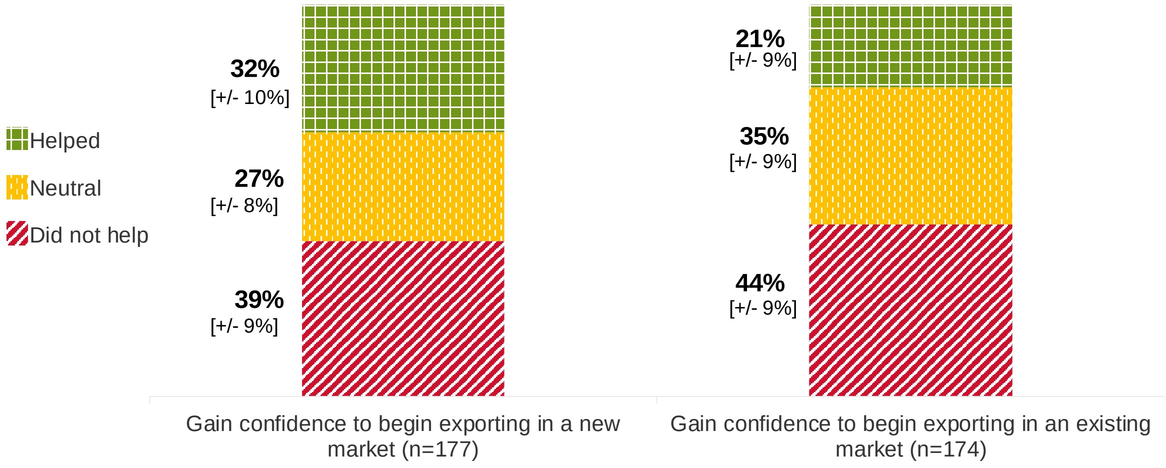
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Sector Teams except those giving a 'not applicable' answer

3.4.9. Wider benefits of service: Sector Teams

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market, using a similar rating scale as above. Confidence building was more widespread when it came to exporting to new markets rather than existing markets. A third (32%) reported that the Sector Teams service improved their confidence in exporting to new markets, compared with around one in five (21%) reporting that the service helped to improve their confidence in exporting to existing markets.

[82] The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Chart 3.4.11 To what extent experience of the service helped to build confidence in exporting - Sector Teams

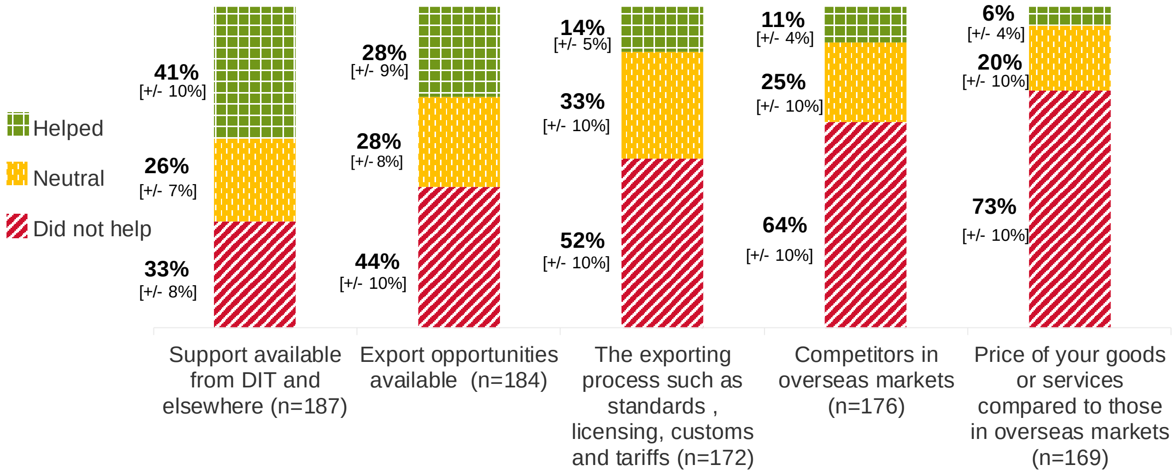


QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of Sector Teams help you to?
Base: All respondents that used Sector Teams except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.4.12 shows the items that were asked of businesses that used Sector Teams. This shows that:

- There was a positive balance in terms of improving knowledge of the support available from DIT and elsewhere. Around four in ten (41%) service users reported that the Sector Teams service had helped with their knowledge of the support available, while a third (33%) said the service did not help them in this way.
- Around three in ten (28%) businesses that had used the Sector Teams service said it had helped to increase their knowledge of the export opportunities available, while more than four in ten (44%) said the service did not help them in this way.
- Businesses were much less likely to report that the Sector Teams service had helped them with specifics of exporting, including exporting process aspects such as standards, licensing, customs and tariffs (14% reported the service had helped). There was a similar picture in terms of improving knowledge of competitors in overseas markets – around one in nine (11%) agreed that the Sector Teams service had helped with this.
- Six per cent agreed that the Sector Teams service had helped increase their knowledge of the price of their goods or services compared with those in overseas markets.

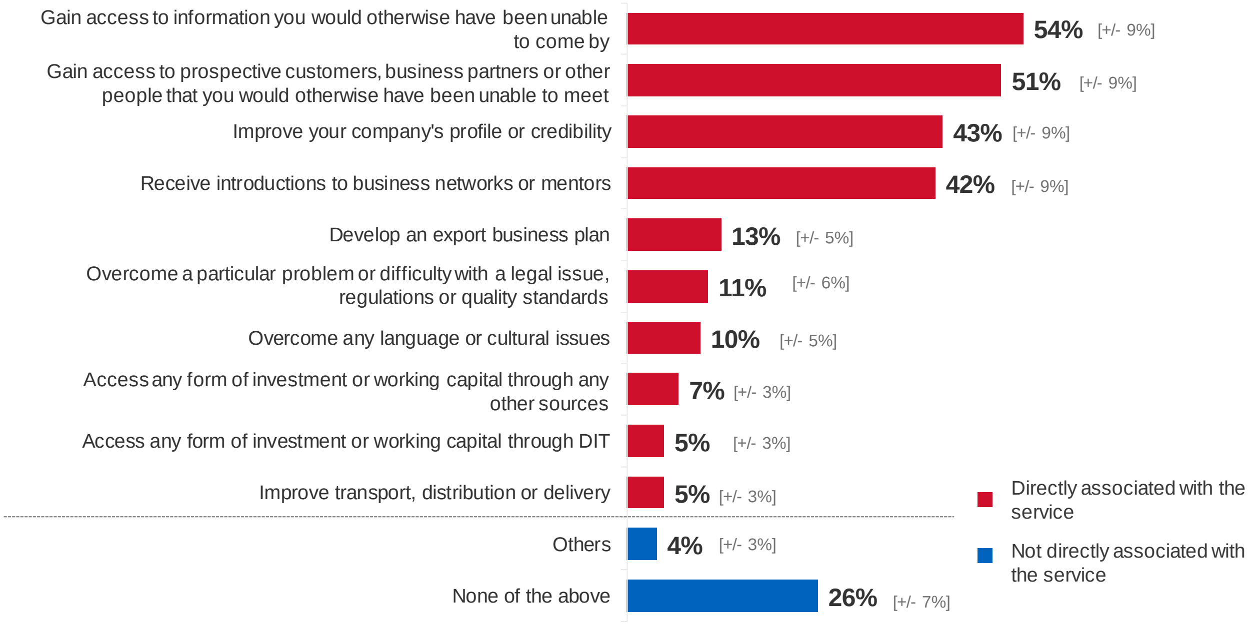
Chart 3.4.12 To what extent the business felt it has improved its knowledge as a result of using the service - Sector Teams



QImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of Sector Teams? Base: All respondents that used Sector Teams except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using the Sector Teams service in the year between dealing with Sector Teams and the RIS interview. A detailed breakdown of responses is shown in Chart 3.4.13, where activities in red show those most closely associated with the service. Of the activities most associated with the service, the most frequent responses from a pre-coded list were to gain access to information that they would otherwise have been unable to come by (54%) and to gain access to prospective customers, business partners or other people they would otherwise have been unable to meet (51%). Improving the company's profile or credibility was also widely cited (43%), as was receiving introductions to business networks or mentors (42%).

Chart 3.4.13 In what ways has the business felt it had benefited from DIT support - Sector Teams[83]

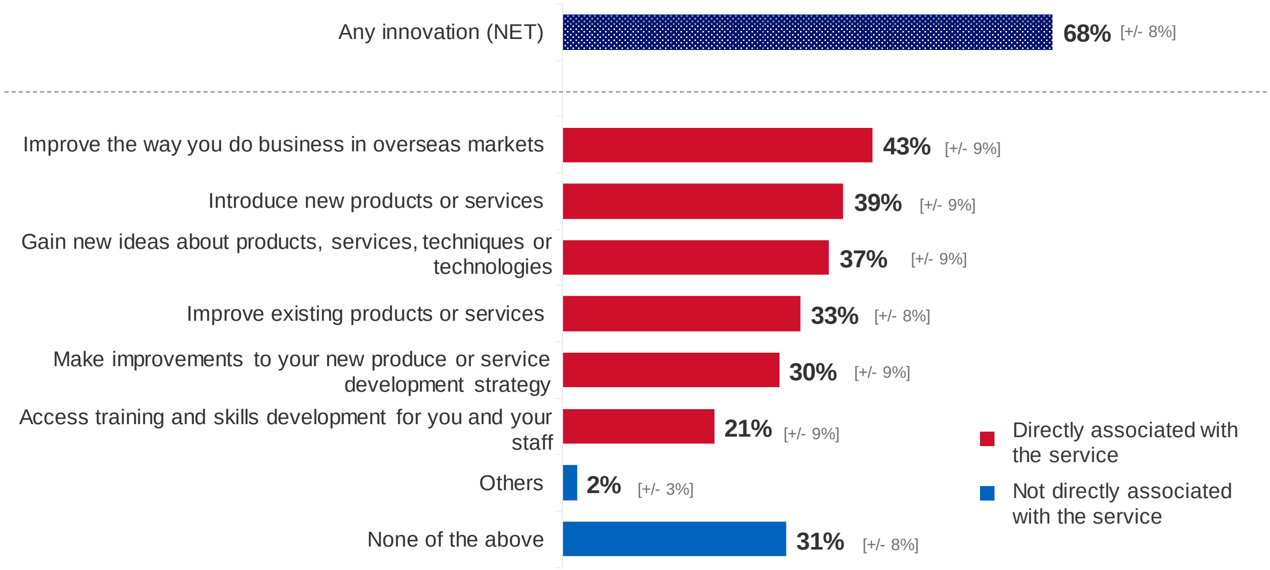


QServiceBenefit – In which of the following ways if any, has your business benefited specifically from Sector Teams over the last year?
Base: All respondents who used Sector Teams (197)

Businesses were asked whether using the Sector Teams service has helped, or will help, support innovation and development as a business. Around seven in ten (68%) said that using the service helped them with innovation or development in some form. Answer codes in red show those most closely associated with the service. The most frequent response was to ‘improve the way you do business in overseas markets’ (43%). Four in ten (39%) mentioned that using the Sector Teams service helped them to introduce new products or services and a similar proportion (37%) said it helped them to gain new ideas about products, services, techniques or technologies. A third (33%) mentioned that the service helped them improve existing products or services, while three in ten (30%) said it had helped them to make improvements to their new product or service development strategy.

83 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.4.14 Whether the service has / will help innovation and development - Sector Teams[84] [85]



QInnovationSupport – Still thinking of Sector Teams, has this service helped or do you expect it to help your business with development and/or innovation? Specifically…
Base: All respondents who used Sector Teams (197)

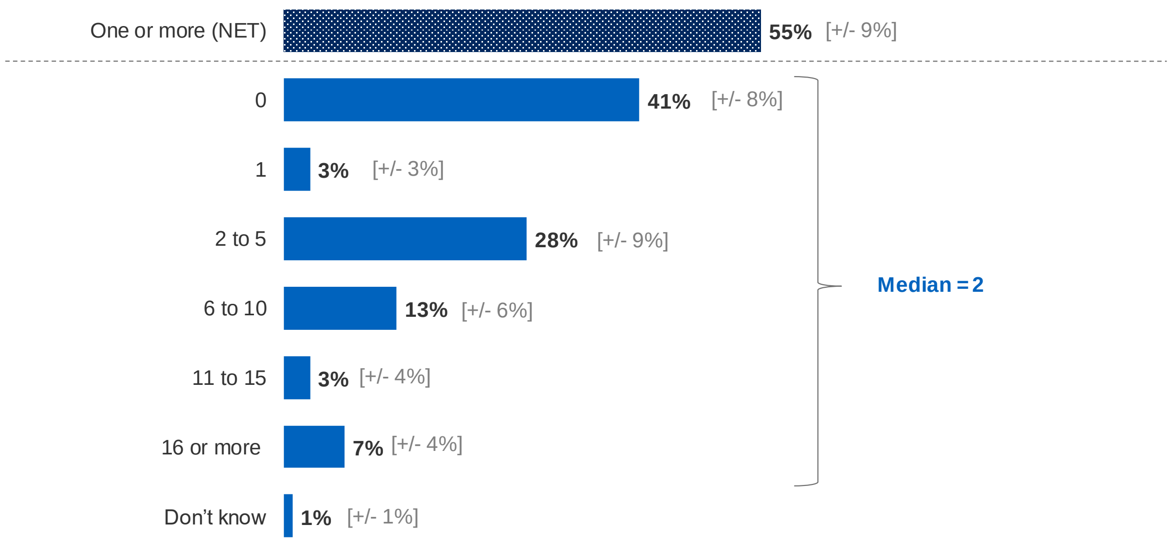
International contacts

Businesses were asked how many overseas contacts they had made as a result of using the Sector Teams service over the past year (Chart 3.4.15). More than half (55%) of businesses made at least one new overseas contact in the year since using the Sector Teams service.

Three per cent made one new overseas contact, and around three in ten (28%) made between two and five new contacts. One in seven businesses (13%) made between six and ten new overseas contacts, and one in nine (11%) made more than ten new contacts. Four in ten (41%) reported they did not make any new contacts as a result of using the Sector Teams service.

[84] The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.
[85] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

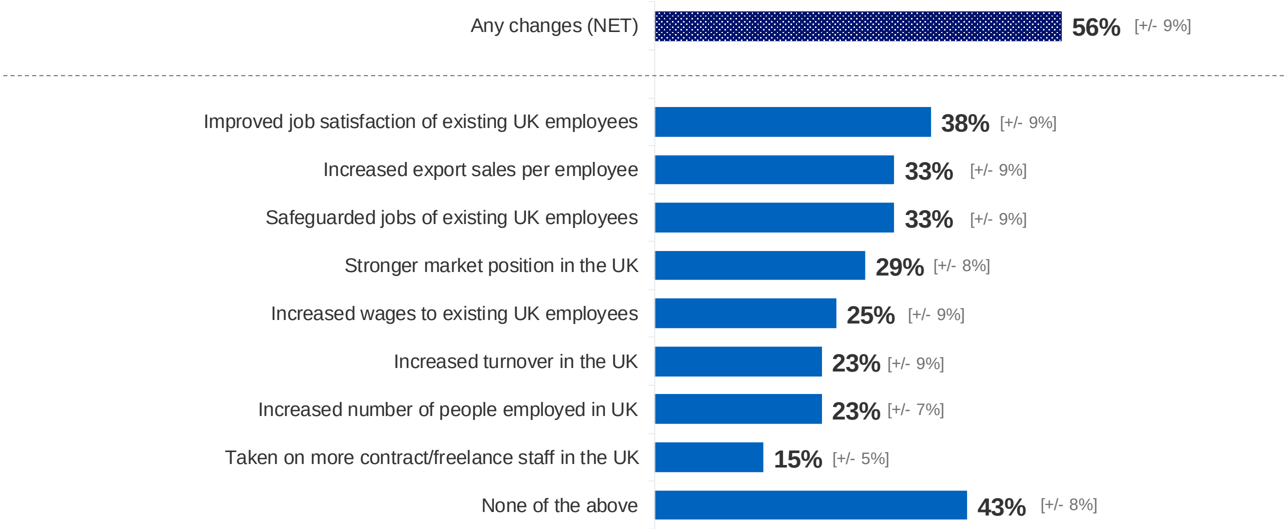
Chart 3.4.15 Number of new overseas contacts made in previous 12 months - Sector Teams



Businesses were asked about the impact they had seen or expected to see as a direct result of using the Sector Teams service (Chart 3.4.16). The most frequently mentioned impact was improved job satisfaction for existing UK employees, which was cited by around four in ten (38%) businesses.

A third of users said they thought using Sector Teams had, or would, increase export sales per employee (33%) and the same proportion said their receipt of the service would safeguard jobs in the UK (33%). Three in ten (29%) felt the service had strengthened their market position in the UK and a quarter (25%) said it had increased wages to existing UK employees.

Chart 3.4.16 Changes expected / seen in the UK business as a result of receiving the service - Sector Teams[86]



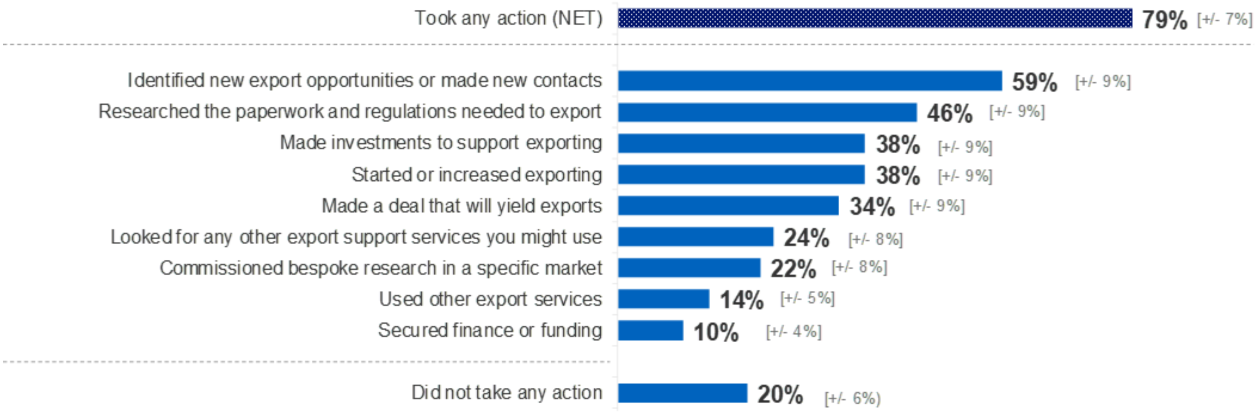
QUKChanges – Which of the following changes have you seen within your UK business as a direct result of Sector Teams?
Base: All respondents who used Sector Teams (197)

3.4.10. Actions taken as a result of the service: Sector Teams

Businesses were asked about the actions they had taken following their use of the Sector Teams service (Chart 3.4.17). Overall, eight in ten (79%) service users reported having taken any action. Six in ten (59%) reported that they had identified new export opportunities or made new contacts and slightly less than half had researched the paperwork and regulations needed to export (46%). Four in ten (38%) had made investments to support exporting and the same proportion reported that they had started or increased exporting (38%). A third had made a deal that will yield exports (34%).

[86] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.4.17 What the business has done as a result of receiving the service - Sector Teams [87] [88]



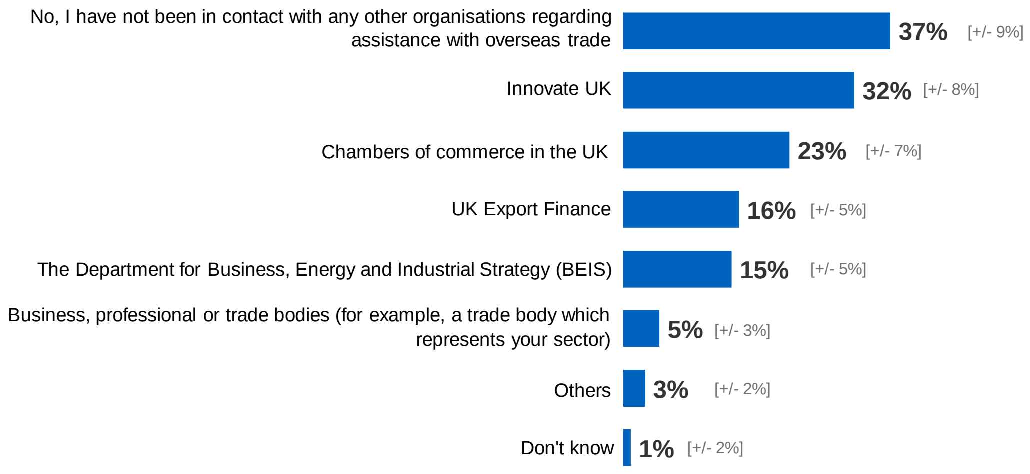
QResultService – What has your business done as a result of Sector Teams? Base: All respondents who used Sector Teams (197).

Businesses were also asked what organisations they had been in contact with since using Sector Teams. A third of businesses had been in touch with Innovate UK (32%) and around a quarter had contacted the Chambers of Commerce in the UK (23%). UK Export Finance (16%) and the Department for Business, Energy and Industrial Strategy (15%) saw the same level of contact. One in twenty (5%) had been in contact with a business, professional or trade body.

Around four in ten (37%) had not been in contact with any other organisations regarding assistance with overseas trade.

[87] The 'Took any action (NET)' groups together all responses from the question apart from responses of 'Did not take any action'. It also includes non-exporters who responded 'Assessed the company's readiness to export'.
[88] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.4.18 What organisations respondents have been in contact with since receiving the service - Sector Teams[89]



QAnyContact – And again, since your business used Sector Teams in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities?
Base: All respondents who used Sector Teams (195)

89 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.5. Webinars

Webinars are organised by the Department for International Trade directly either by a British Embassy or consulate overseas. They are delivered by experts from both private and public-sector organisations. The Webinars' primary aim is to provide information to a target audience ranging from experienced exporters to businesses that are new to exporting.

3.5.1. Webinars: Quality survey summary

These findings are based on interviews with 119 businesses who used Webinars from April 2018 to March 2019 and participated in both the Quality Survey and Reported Impact Survey.

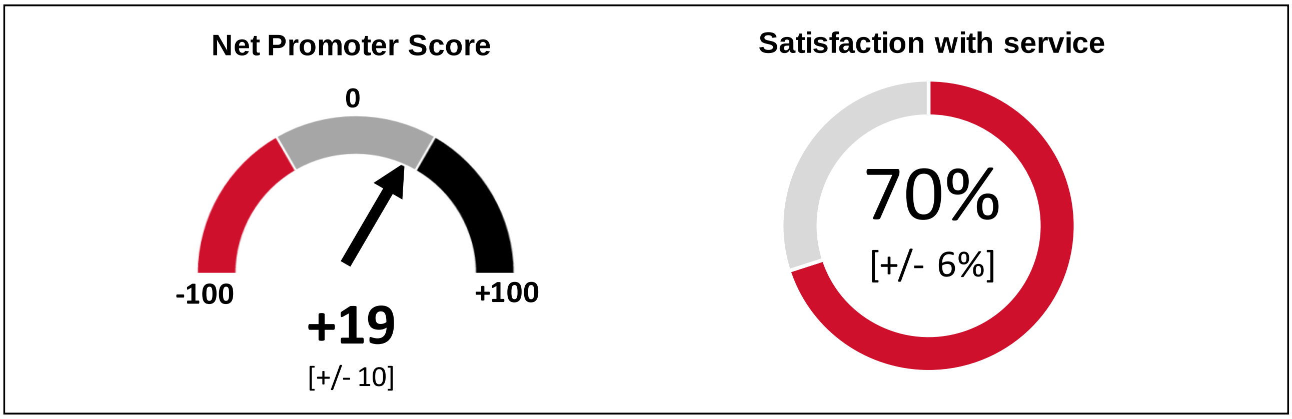
Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=333), as an overview of the businesses' experience of using the Webinars service.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own[90]. Around a four in ten (42%) were 'Promoters' of Webinars, while just under a quarter (22%) were 'Detractors' (score of 0-6) and one in three (35%) were neutral (score of 7-8). **Overall, Webinars had an NPS of +19.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)[91].

Overall, seven in ten (70%) businesses were satisfied with their experience of Webinars (rating of 7 or more out of 10), and this included 20% of businesses who gave a 'very satisfied' rating (10 out of 10).

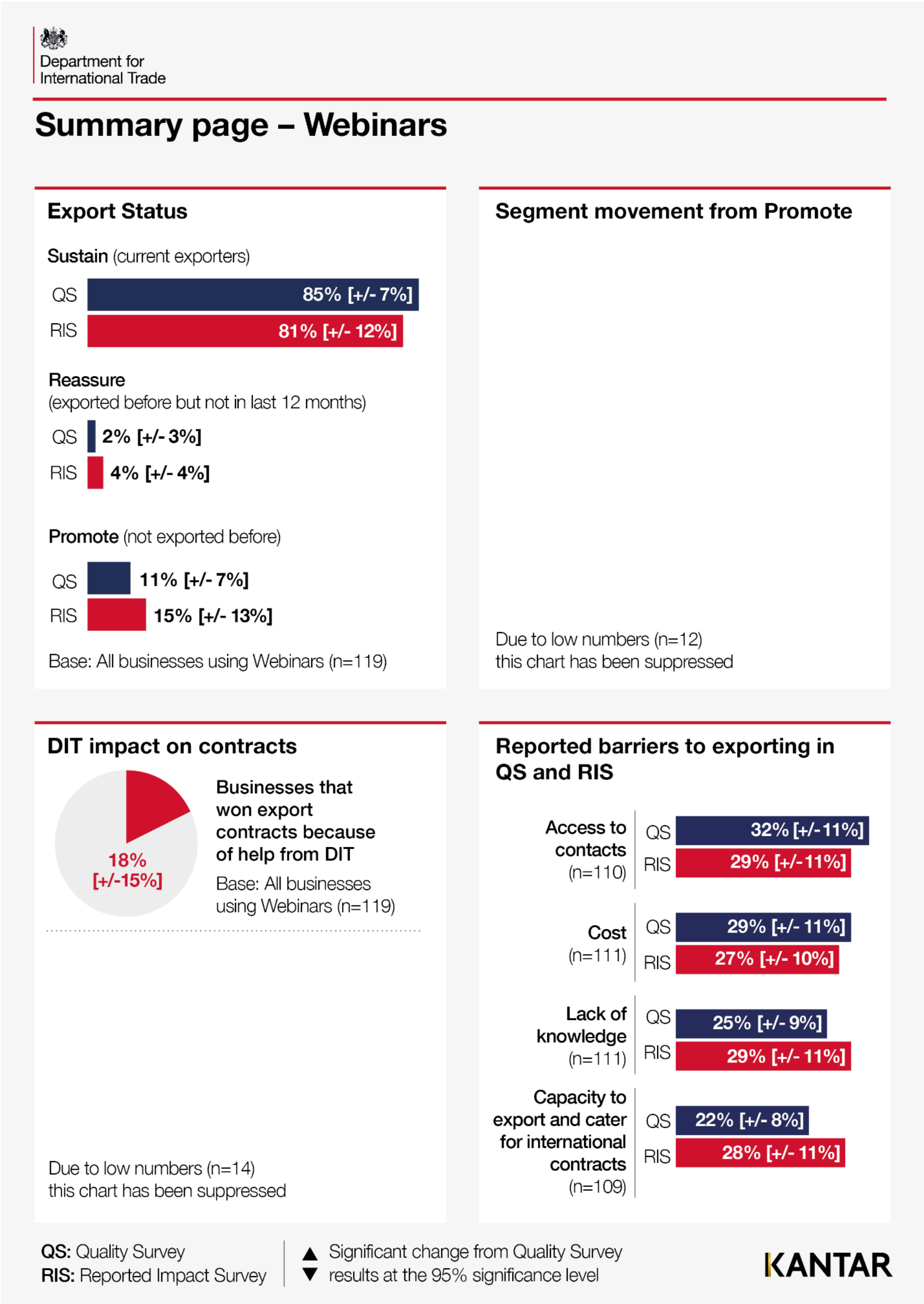
Chart 3.5.1 Net Promoter Score and Satisfaction with service from Quality Survey – Webinars



[90] Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.

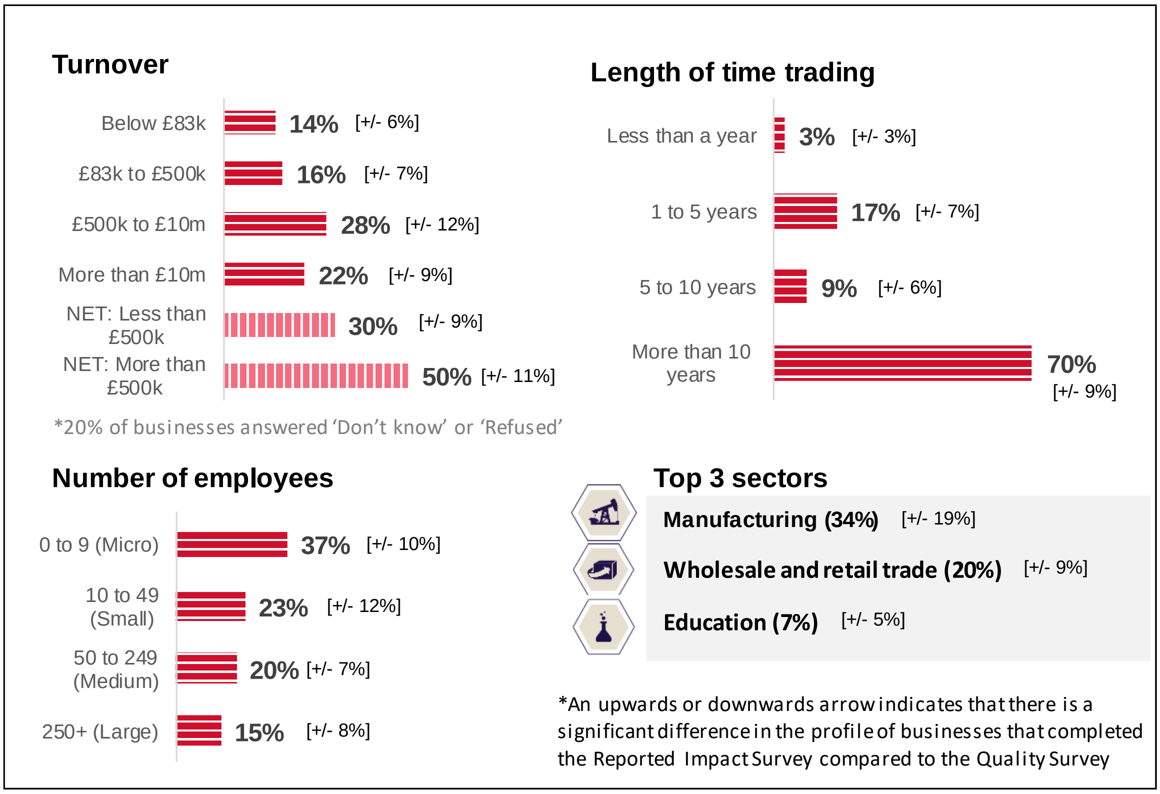
[91] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.5.2 Key indicators from the RIS survey – Webinars



3.5.2. Profile of RIS survey respondents: Webinars

Chart 3.5.3 Profile of RIS Survey Respondents[92] - Webinars



Reported Impact on exporting

3.5.3. Export Status

Businesses that used the Webinars service were asked about their export status, both at the time of their interaction with the Webinars service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DIT has grouped UK businesses into segments, which reflect businesses' views on their potential to export. These segments include:

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around eight in ten (85%) that used the Webinars service fell into this segment at the time of their interaction. This was 81% in the RIS 12 months later. This difference is not significant.

Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Two per cent that used the Webinars service fell into this segment at the time of their interaction, compared with four per cent 12 months later. This difference is not significant.

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed

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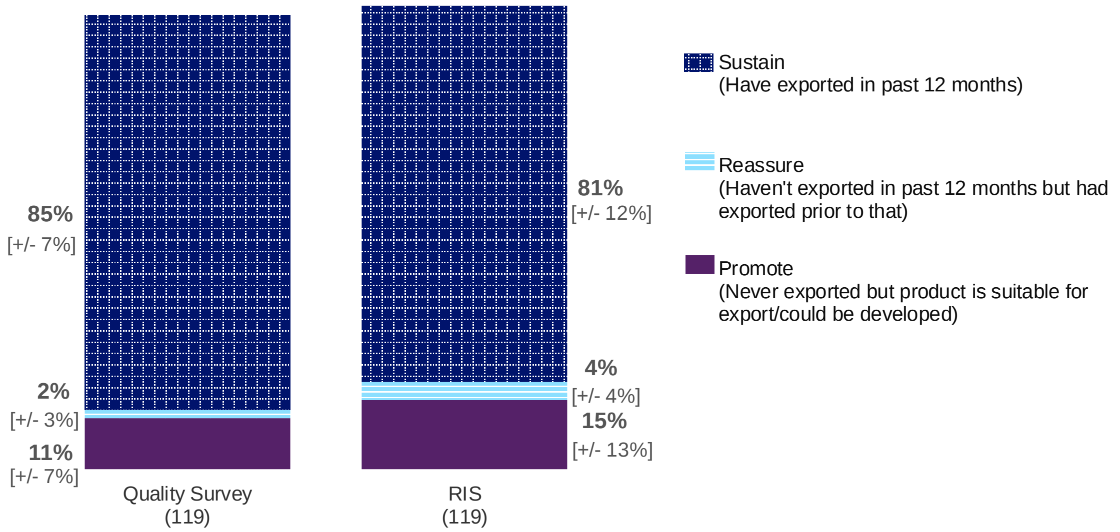
[92] Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

for export. Around one in ten (11%) that used the Webinars service fell into this segment at the time of their interaction. This was similar (15%) 12 months later. This difference is not significant.

Chart 3.5.4 Exporter status reported at time of interaction (Quality Survey) and 12 months later (RIS) - Webinars[93]

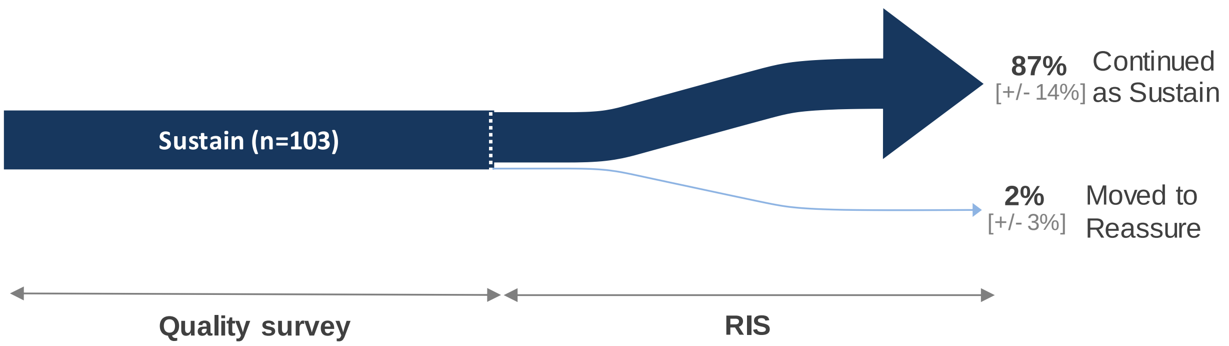


Source: Composite measure merging data from several variables
Base : All respondents who used Webinars and completed RIS: Quality Survey/ RIS (119/119)

Of the businesses that were in the Sustain segment (exported in the last 12 months) at the time of the Quality Survey (103 businesses), 87% reported that they had continued in Sustain and two per cent reported that they had moved to Reassure (not exported in last 12 months but have previously exported) (Chart 3.5.5)[94]. Only 12 businesses were in the Promote segment at the time of the Quality Survey and therefore movement is not displayed due to the low base size.

[93] Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote
[94] Of the businesses that were in the Sustain segment at the time of the Quality Survey, 11% moved to Promote. This movement is likely to be caused by respondent error when completing the survey.

Chart 3.5.5 Exporter status reported at time of interaction (Quality Survey) and 12 months later (RIS) [rebased] - Webinars



Source: Composite measure merging data from several variables
Base : All Webinars respondents who were in the Sustain segment in the Quality Survey and completed RIS: 103

3.5.4. Reported Export Contracts Achieved since receiving the service: Webinars

Businesses that reported they had exported were asked if they had won any new export contracts or extended any existing contracts in the 12 months since using the Webinars service. They were asked to think of all contracts, not just those assisted by the Webinars service or DIT.

Of the 81% of businesses that exported (104 businesses), 66% reported that they had won any new overseas business contract and/or had gained extensions to existing overseas business contracts in the year since they used the service.

Of the 81% of businesses that exported, six in ten (57%) of these exporting businesses reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.5.6). Four per cent had won one overseas contract, with nearly a quarter (23%) winning between two and five. One in six (16%) businesses had won more than fifteen overseas contracts, while one per cent had won more than fifty contracts.

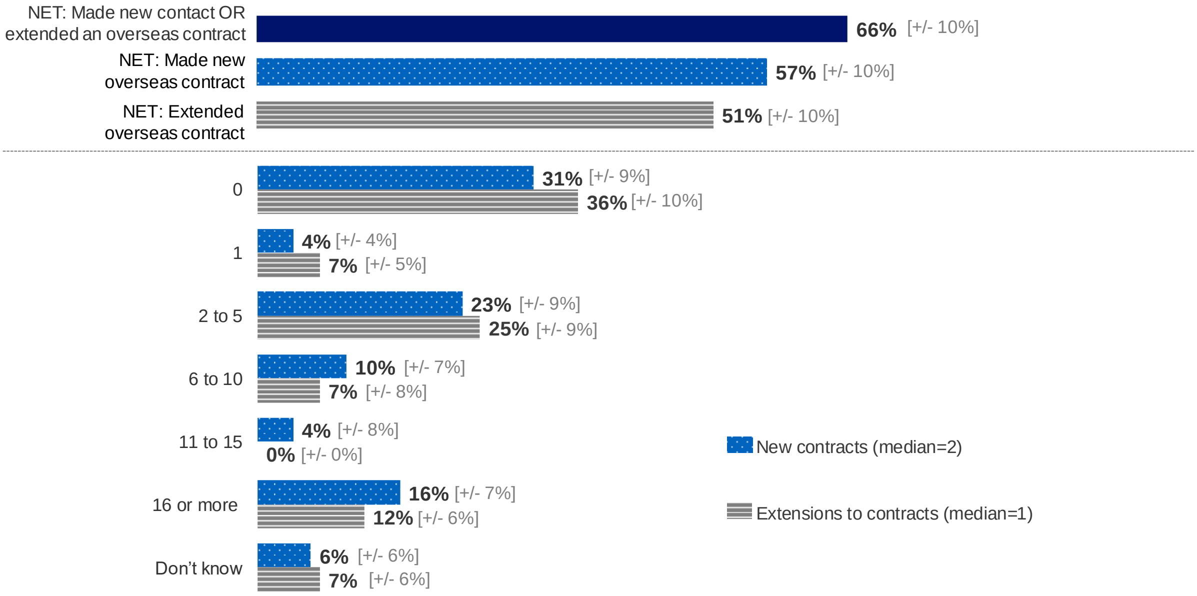
The median number of contracts won among exporting businesses that used the Webinars service was two (this is taken from the 58% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

Around half (51%) of exporting businesses that used the Webinars service reported they had gained extensions to existing overseas business contracts in the year since they used the service. Seven per cent extended one, one in four (25%) between two and five, seven per cent between six and ten, and 12% extended more than ten existing overseas sales contracts. Three per cent had extended more than 30 contracts. Just more than a third (36%) of businesses had not extended any existing contracts.

The median number of contracts extended (including those that did not extend any) was one.

Chart 3.5.6 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contract made in previous 12 months – Webinars[95]

[95] The total percentage of all responses for this question add up to above 100 per cent because of rounding.



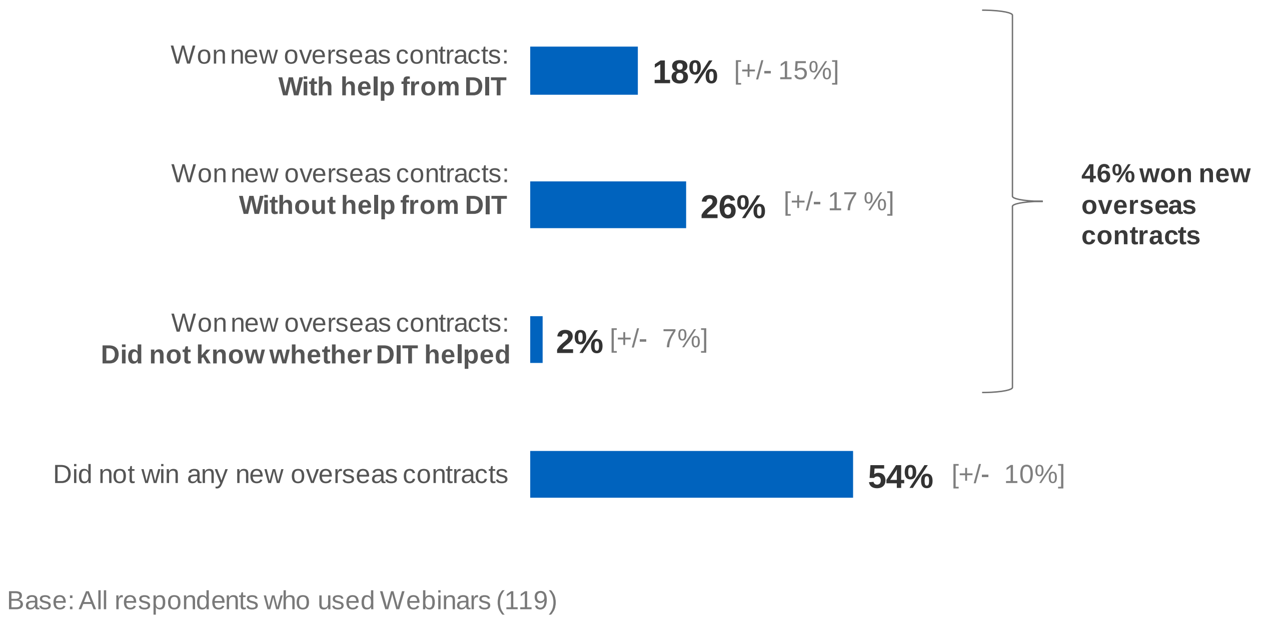
Q_Newcontract– Firstly, how many new overseas business contracts for export sales did you win in the past year?
Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
Base: All respondents who used Webinars and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (104)

Reported additional contracts which were gained because of DIT support – Webinars

Looking at all business that used Webinars (including those that were not currently exporting and those that did not win any contracts or contract extensions), 18% said they won contracts with the assistance of the Webinars service or DIT[96], 26% won one or more contracts without the assistance of DIT and two per cent were not able to say.

[96] Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.5.7 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – Webinars



3.5.5. Summary of reported impact as a result of DIT support: Webinars

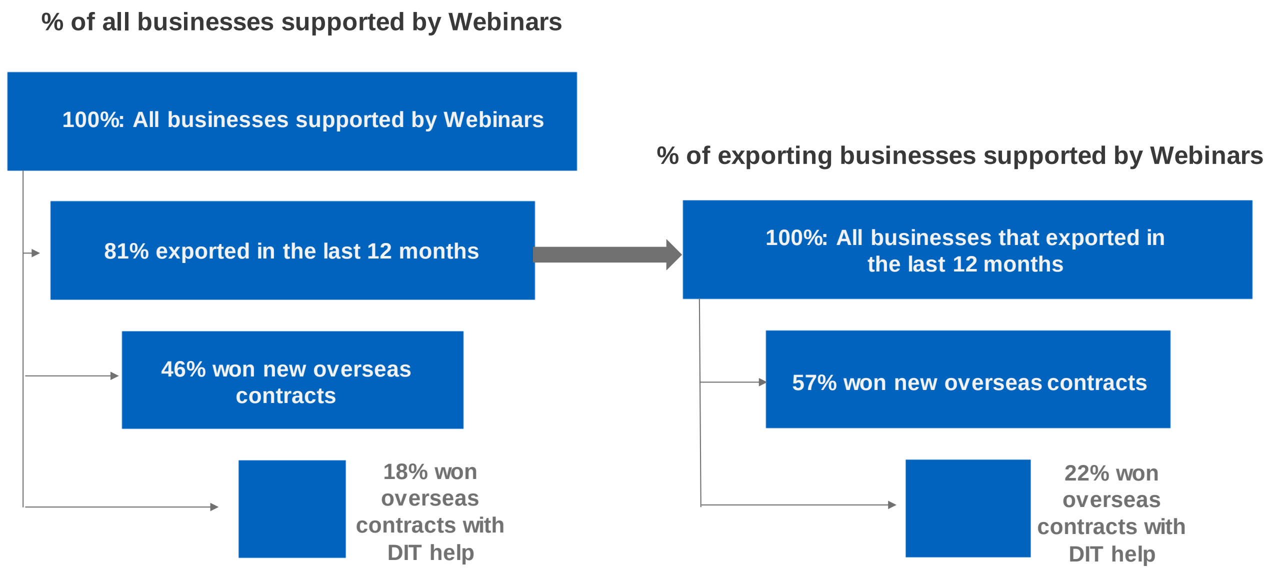
This section summarises the analysis on reported additional impact which aims to estimate the additional impact that DIT services had on businesses, this impact would not have happened without DIT's support.

Looking at all businesses supported by Webinars interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), eight in ten (81%) were exporters, meaning they were exporting at the time of service use or in the last 12 months.

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this[97].

[97] The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

Chart 3.5.8 Summary of businesses supported by Webinars[98]



Base: All respondents who used Webinars (119)

3.5.6. Exposure and growth within new markets: Webinars

All businesses that used Webinars were asked whether they received increased exposure or started doing business in any new markets because of their interaction with Webinars[99]. One in ten (8%) had been exposed to at least one new market and two per cent had started doing business in at least one new market as a result of using the Webinars service.

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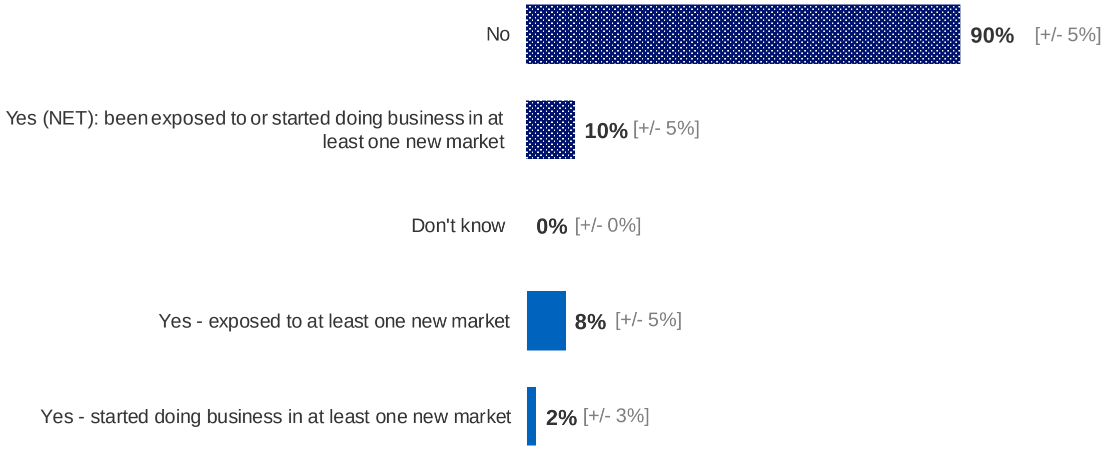
[98] In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 38% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so 38% * 46% = 18%. Find more information about how this was calculated in the technical report.

[99] Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

Chart 3.5.9 Whether increased exposure or starting business in a new overseas market – Webinars



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SAMPLED SERVICE]?
Base: All respondents who used Webinars (119)

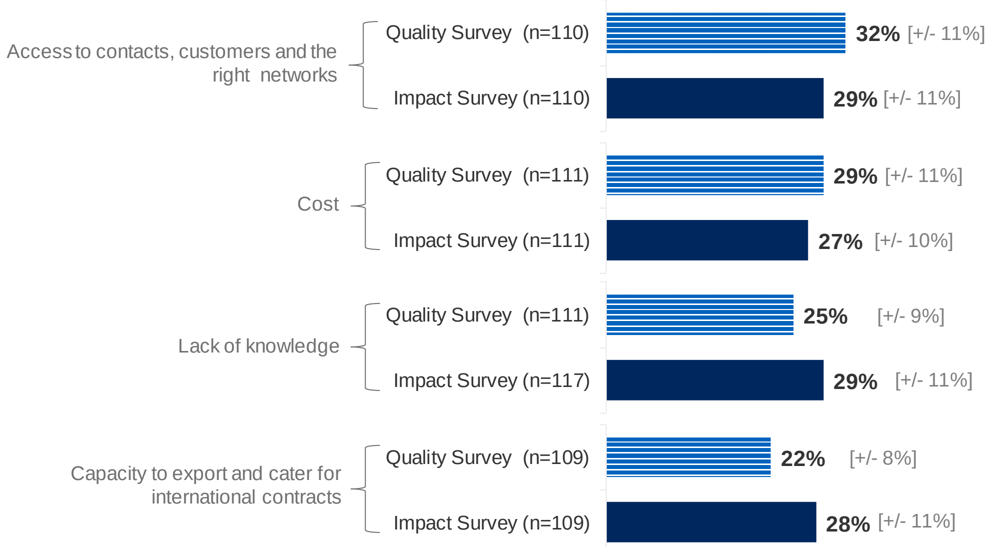
3.5.7. Barriers to exporting: Webinars

Businesses were asked in both the Quality Survey and Reported Impact Survey about some **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 0 (not a barrier at all). This section compares results from between surveys for businesses who completed both surveys and provided a response to this question in both surveys[100].

There were no significant changes in the proportion of businesses that said ‘access to contacts, customers and the right networks’, ‘cost’, ‘lack of knowledge’ or ‘capacity to export and cater for international contracts’ were barriers to exporting (rating of 7 to 10 out to 10) between the Quality Survey and RIS (Chart 3.5.10).

[100] Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.5.10 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Webinars[101]

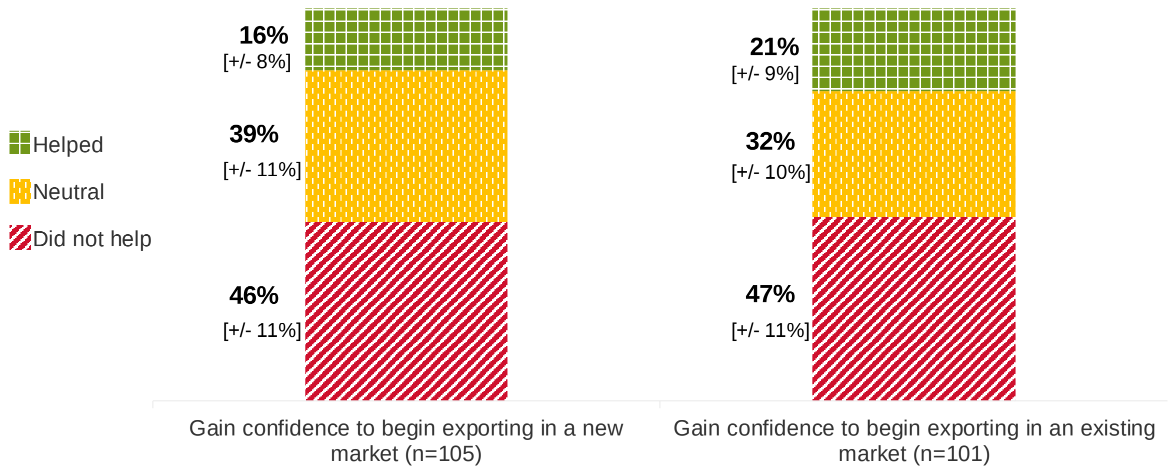


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents who used Webinars except those giving a 'not applicable' answer

3.5.8. Wider benefits of service: Webinars

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market using a similar rating scale as above. Around one in six businesses said that using the Webinars service helped them gain confidence to begin exporting in a new market (16%) or to increase exporting in an existing market (21%). Just under half of businesses said it did not help them (46% and 47% respectively).

Chart 3.5.11 To what extent experience of the service helped to build confidence in exporting – Webinars



QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of [SAMPLED SERVICE] help you to?
Base: All respondents who used Webinars except those giving a 'not applicable' answer

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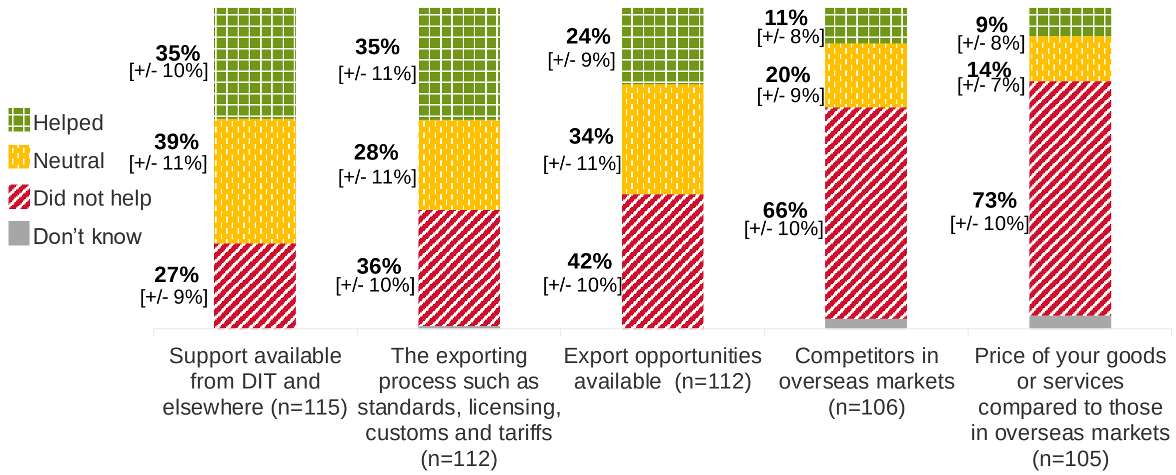
[101] The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.5.12 shows the items that were asked of businesses that used Webinars. This shows that:

- Just over a third (35%) of businesses that had used Webinars said the service helped by increasing their knowledge of the support available from DIT and elsewhere, whilst just over a quarter (27%) said the service did not help in this way.
- Just over a third (35%) of businesses that had used Webinars said that the service helped them improve their knowledge of the exporting process such as standards, licensing, customs and tariffs, whilst a similar proportion (36%) said that the service did not help them in this way.
- Businesses that used Webinars were more likely to say that the service did not help them improve their knowledge than they were to say it helped improve it for their knowledge of:
    - export opportunities available;
    - competitors in overseas markets and;
    - price of goods or services compared with those in overseas markets.

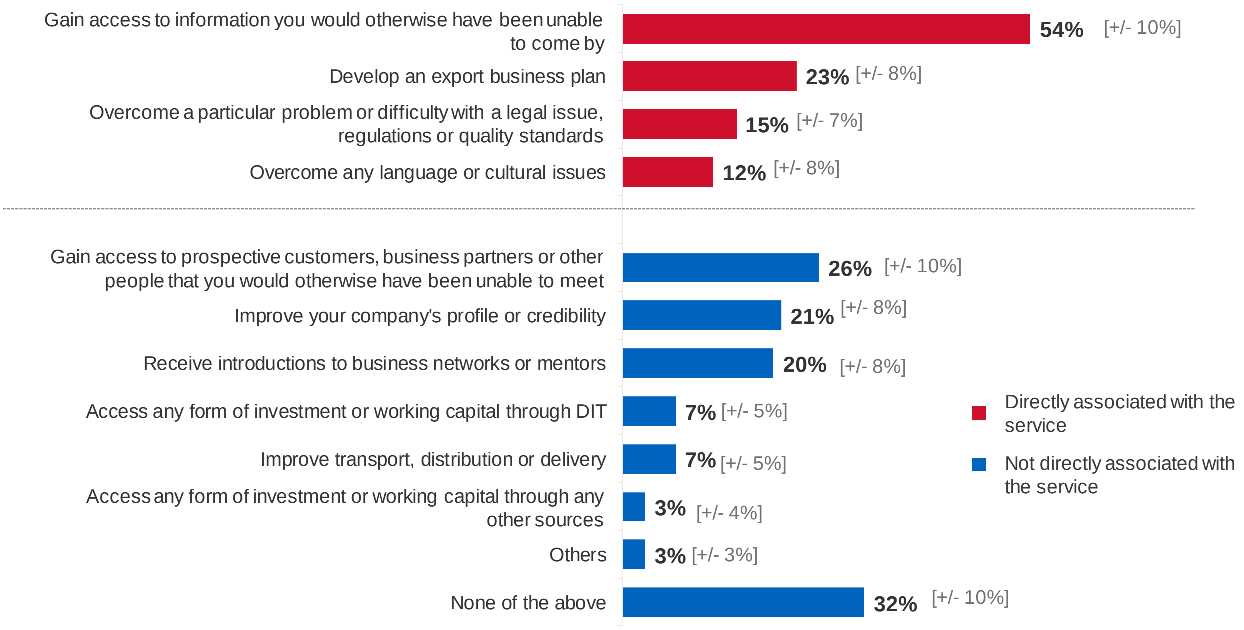
Chart 3.5.12 To what extent the business felt it has improved its knowledge as a result of using the service – Webinars



QImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of [SAMPLED SERVICE]?
Base: All respondents who used Webinars except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using the Webinars service in the year between dealing with Webinars and the RIS interview. A detailed breakdown of responses is shown in Chart 3.5.13, where activities in red show those most closely associated with the service. The most frequent responses from a pre-coded list were to gain access to information that they would have otherwise been unable to come by (54%) and gain access to prospective customers (26%). A quarter (23%) said they developed an export plan, and two in ten said it helped them to improve the company's profile or credibility (21%) or receive introductions to business networks or mentors (20%).

Chart 3.5.13 In what ways has the business felt it had benefited from DIT support – Webinars[102]

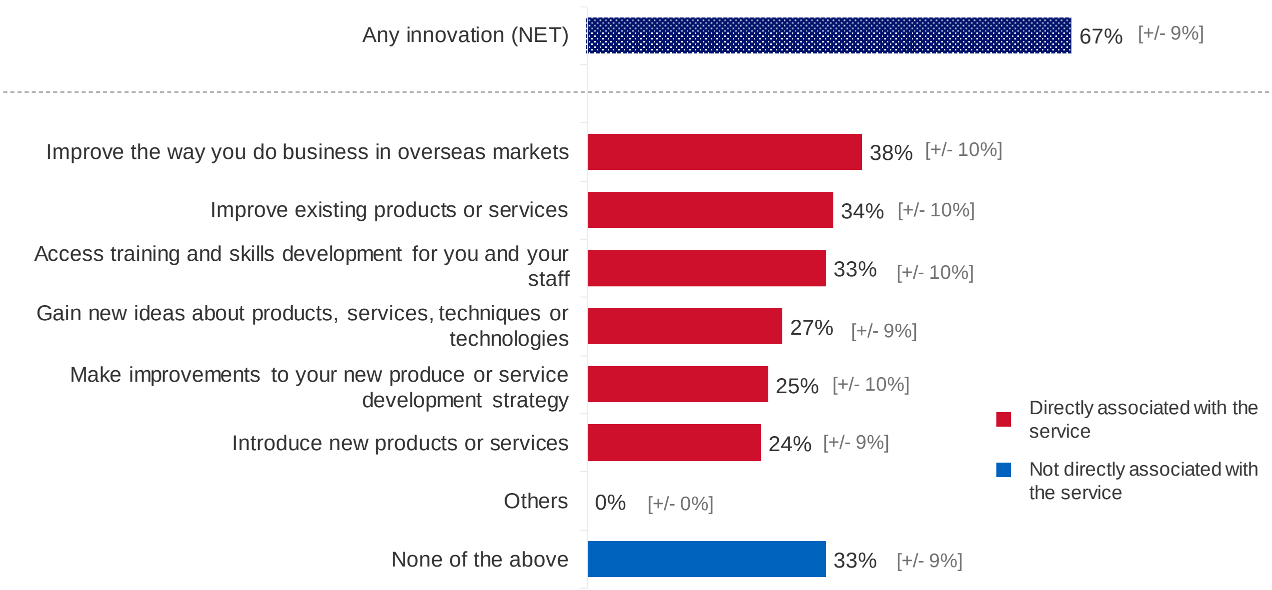


QServiceBenefit – In which of the following ways if any, has your business benefited specifically from [SAMPLED SERVICE] over the last year?
Base: All respondents who used Webinars (119)

Businesses were asked whether using the Webinars service has helped, or will help, support innovation and development as a business. Just over two-thirds (67%) of businesses said that using the service helped them with innovation or development in some way. The most common response was to ‘improve the way you do business overseas’ (38%). Around a third said that using the Webinars service helped them improve existing products or services (34%), or access training and skills development (33%). Around a quarter of businesses said the service helped them to gain new ideas about products, services, techniques or technologies (27%), make improvements to new products or services (25%), or introduce new products or services (24%).

[102,19] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.5.14 Whether the service has / will help innovation and development – Webinars [103,104]



QInnovationSupport – Still thinking of Webinars, has this service helped or do you expect it to help your business with development and/or innovation? Specifically…
Base: All respondents who used Webinars (119)

International contacts

Businesses were asked how many overseas contacts they had made as a result of using the Webinars service over the past year (Chart 3.5.15). A fifth (21%) of businesses made at least one new overseas contact in the year since using the Webinars service. Four per cent made one new overseas contact, and one in ten (9%) made between two and five new contacts. Four per cent of businesses made between six and ten new overseas contacts, and four per cent made more than ten new contacts. Around three-quarters (74%) reported that they did not make any new contacts as a result of using the Webinars service.

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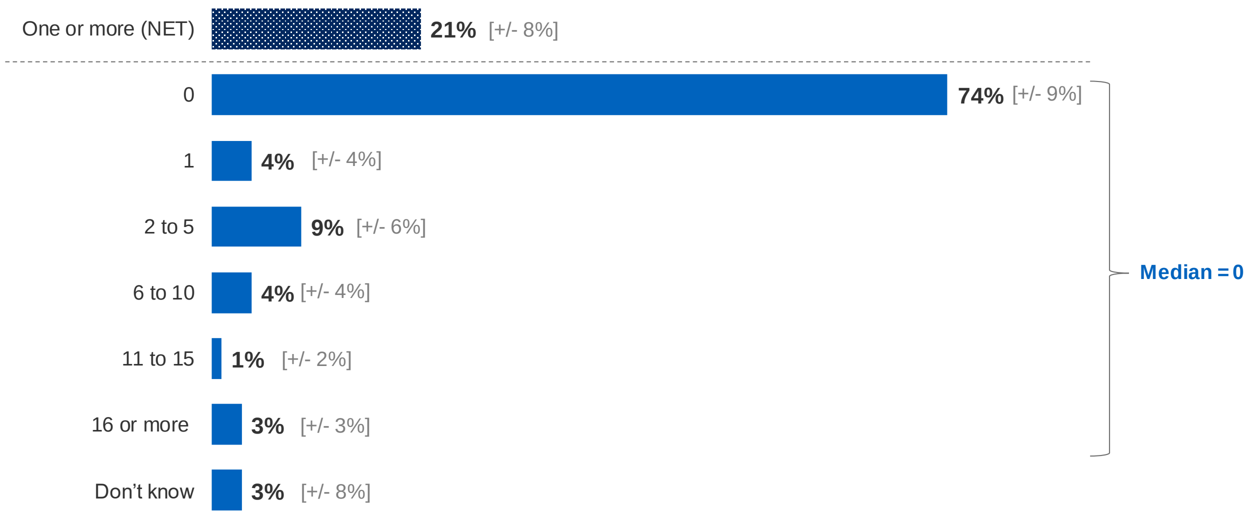
[103] The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.
[104] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

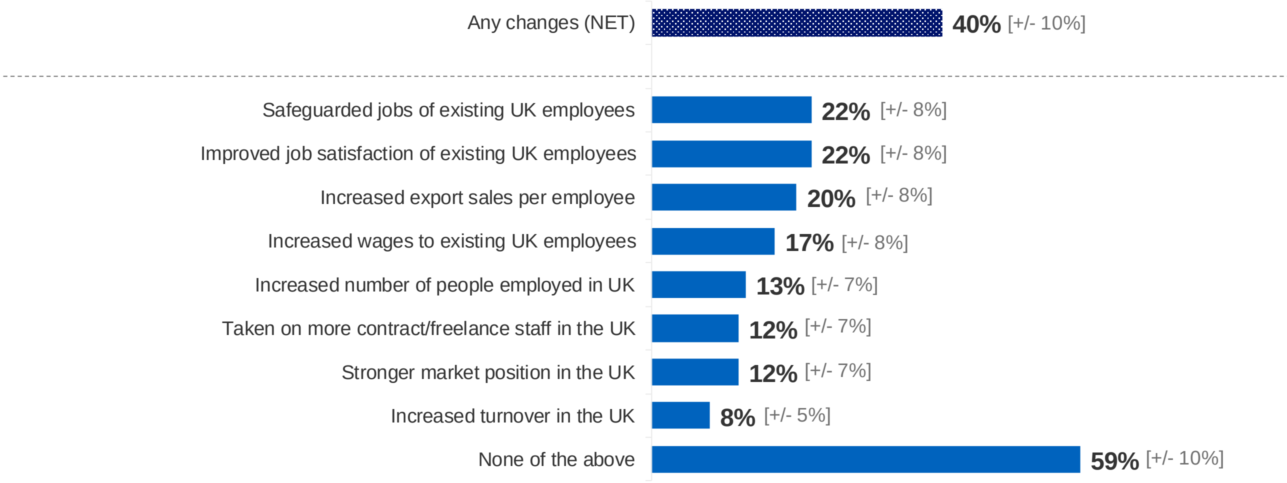
Chart 3.5.15 Number of new overseas contacts made in previous 12 months – Webinars



Q_ContactsMade – How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
Base: All respondents who used Webinars (119)

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Webinars service. One in five businesses thought they had or would safeguard jobs of existing UK employees (22%), or improve job satisfaction of existing UK employees as a direct result of using the service (22%), or increase export sales per employee (20%). Seventeen per cent of businesses said that using the Webinars service had or would increase wages of existing UK employees. Around one in ten mentioned increased number of people employed in UK (13%), or taken on more contract or freelance staff in the UK (12%), or resulted in stronger market position in the UK (12%). Eight per cent felt using the service had or would increase turnover in the UK (8%).

Chart 3.5.16 Changes expected / seen in the UK business as a result of receiving the service – Webinars[105]



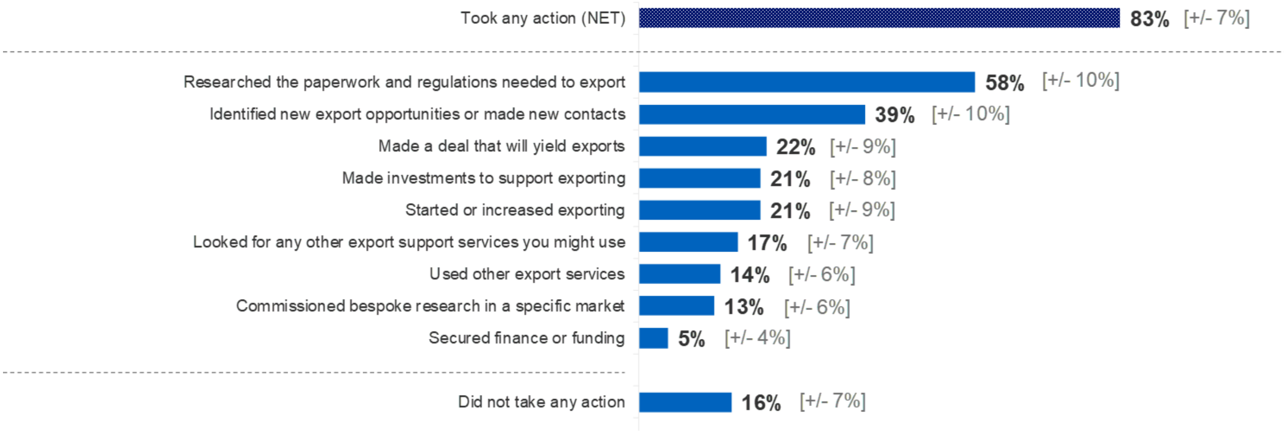
QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
Base: All respondents who used Webinars (119)

3.5.9. Actions taken as a result of the service: Webinars

Businesses were asked about the actions they had taken following their use of the Webinars service (Chart 3.5.17). Nearly six in ten (58%) reported that they had researched the paperwork and regulations needed to export. Two-fifths (39%) said they identified new export opportunities or made new contacts. Around one in five businesses said they made a deal that will yield exports (22%), made investments to support exporting (21%), or started or increased exporting (21%). Seventeen per cent of businesses reported looking for any other export support service after using the Webinars service.

105 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.5.17 What the business has done as a result of receiving the service – Webinars[106][107]



QResultService - What has your business done as a result of [SAMPLED SERVICE]?
Base: All respondents who used Webinars (119). The net score also includes non-exporters who assessed their readiness to export.

Businesses were asked what organisations they had been in contact with since using Webinars. Just over half of businesses had been in touch with public organisations such as the Chambers of Commerce in the UK (36%), Innovate UK (12%) or The Department for Business, Energy and Industrial Strategy (BEIS) (11%). Two-fifths (42%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

106 The 'Took any action (NET)' groups together all responses from the question apart from responses of 'Did not take any action'.
107 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.5.18 What organisations respondents have been in contact with since receiving the service – Webinars[108]

QAnyContact – And again, since your business used [SAMPLED SERVICE] in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities?
Base: All respondents who used Webinars (119)

*Includes 'Devolved administrations' (2%), 'Overseas administrations' (2%), 'Banks' (1%), 'Any other lenders (such as export credit agencies)' (1%), 'Friends or colleagues' (1%)

108 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.6. Export Opportunities

Export Opportunities is an online service on great.gov.uk where global exporting opportunities are advertised by DIT's overseas offices buyers. These opportunities are all ones which UK based businesses can bid for.

3.6.1. Export Opportunities: Quality survey summary

These findings are based on interviews with 348 businesses who used Export Opportunities from April 2018 to March 2019 and participated in both the Quality Survey and Reported Impact Survey.

Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=893), as an overview of the businesses' experience of using the Export Opportunities service.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own[109]. Around a quarter (22%) were 'Promoters' of Export Opportunities, while just under half (44%) were 'Detractors' (score of 0-6) and three in ten (33%) were neutral (score of 7-8). **Overall, Export Opportunities had an NPS of -22.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)[110].

Overall, just under half (45%) of businesses were satisfied with their experience of Export Opportunities (rating of 7 or more out of 10), and this included 7% of businesses who gave a 'very satisfied' rating (10 out of 10).

Chart 3.6.1 Net Promoter Score and Satisfaction with service from Quality Survey – Export Opportunities

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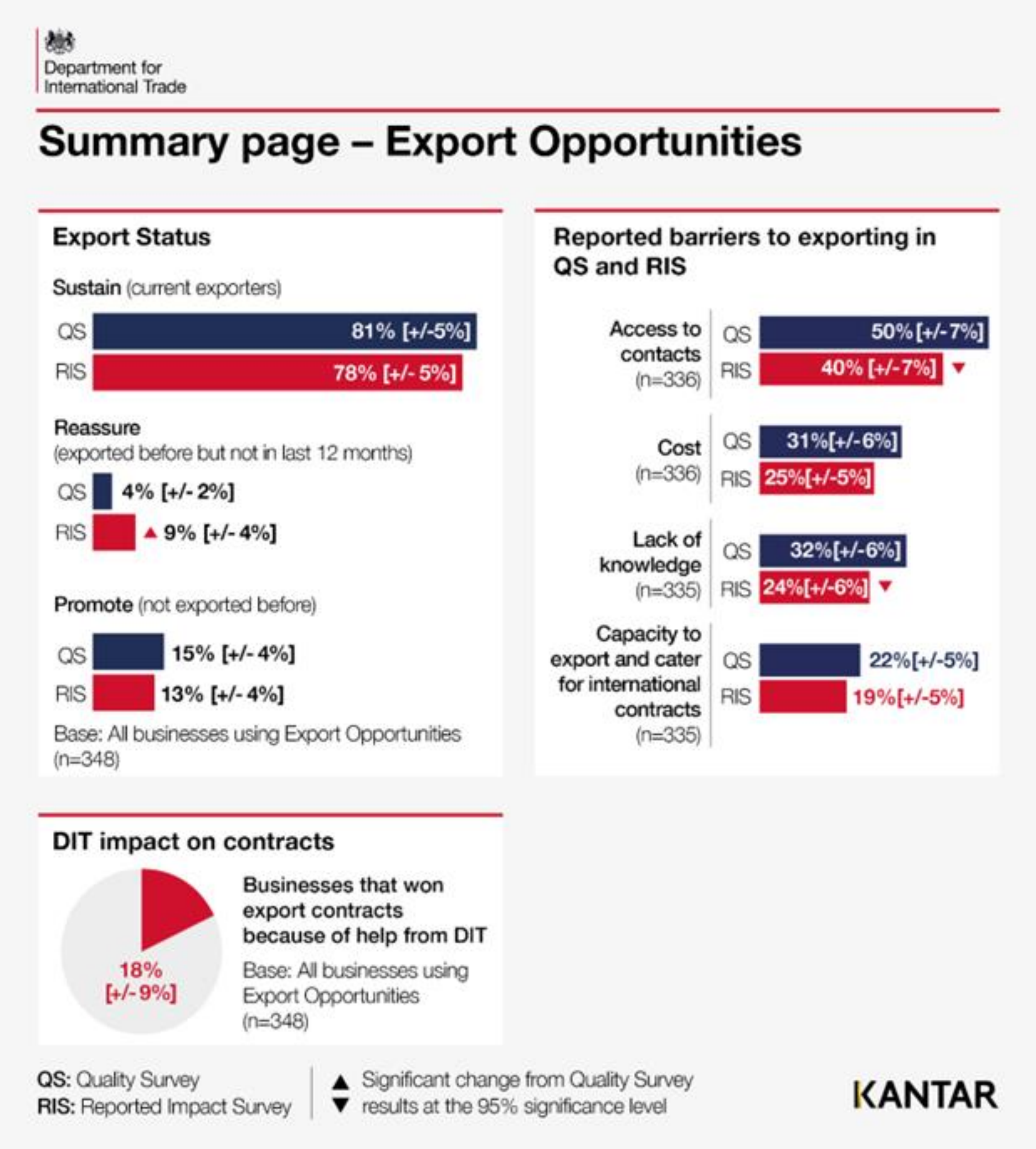
[109] Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.

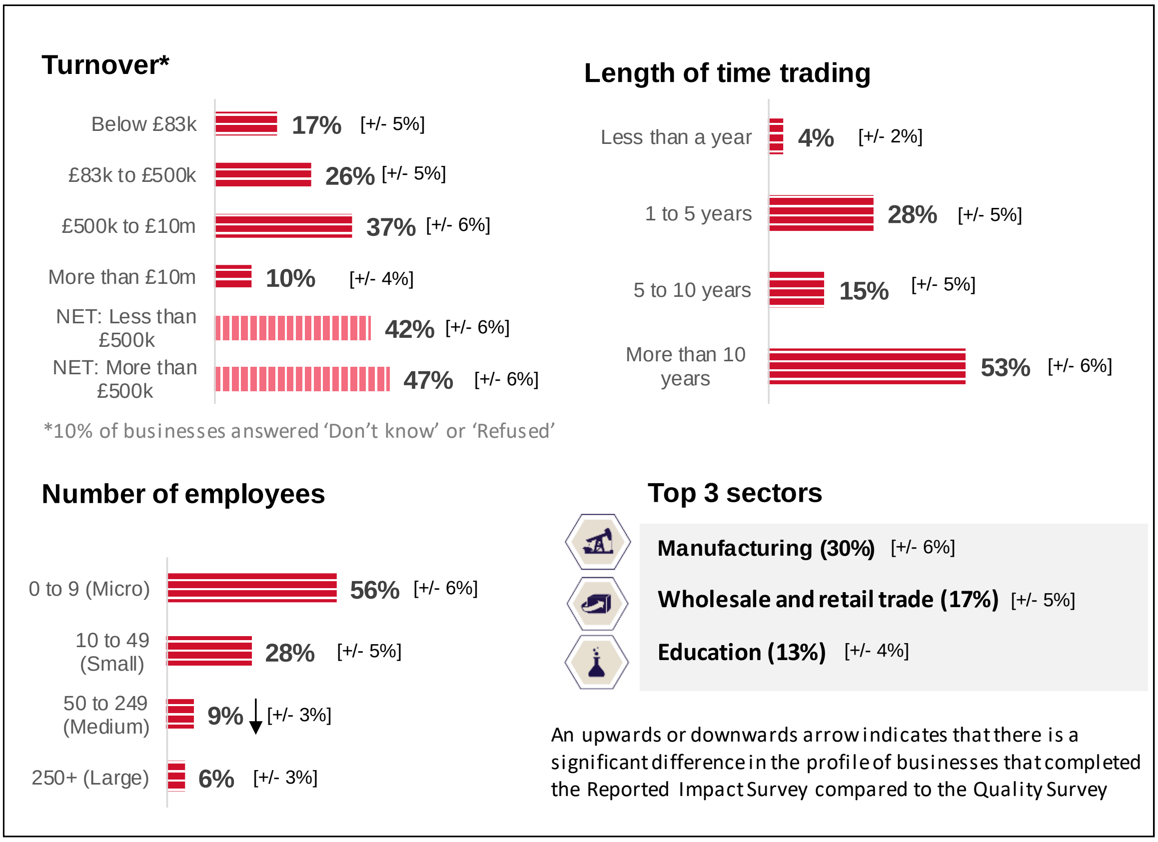
[110] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.6.2 Key indicators from the RIS survey – Export Opportunities



3.6.2. Profile of RIS survey respondents: Export Opportunities

Chart 3.6.3 Profile of RIS Survey Respondents[111] - Export Opportunities



Reported Impact on exporting

3.6.3. Export Status

Businesses that used the Export Opportunities service were asked about their export status, both at the time of their interaction with the Export Opportunities service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DIT has grouped UK businesses into segments, which reflect businesses' views on their potential to export. These segments include:

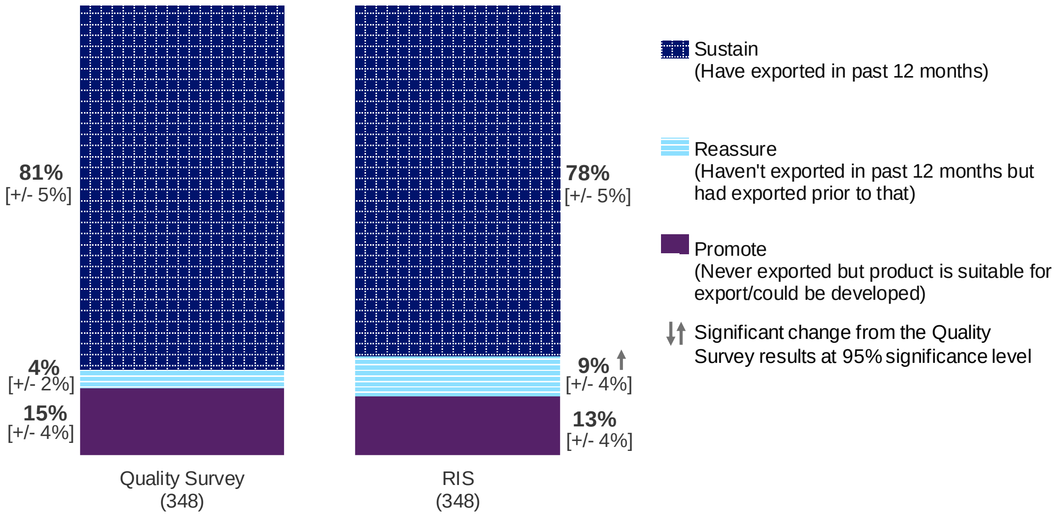
Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around eight in ten (81%) that used the Export Opportunities service fell into this segment at the time of their interaction. Twelve months later in the RIS, 78% of businesses were in this segment. This difference is not significant.

Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Four per cent that used the Export Opportunities service fell into this segment at the time of their interaction. This was higher, at nine per cent, twelve months after the interaction .

[111] Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. Around one in seven (15%) that used the Export Opportunities service fell into this segment at the time of their interaction, and this was 13% 12 months later. This difference is not significant.

Chart 3.6.4 Exporter status at time of interaction (Quality Survey) and 12 months later (RIS) - Export Opportunities[112]



Source: Composite measure merging data from several variables
Base : All respondents that used Export Opportunities and completed RIS: Quality Survey/ RIS (348)

The export status of some businesses changed between the time of interaction in the Quality Survey, and 12 months later in the RIS survey (Table 3.6.1). Five per cent of businesses reported that they had moved from Sustain to Reassure, that is from being a current exporter to having previously exported but having not done so in the past 12 months.

112 Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote

Table 3.6.1 Change in export status at time of interaction (Quality Survey) and 12 months later (RIS) – Export Opportunities

Quality Survey Reported Export status n=348	Reported Impact Survey Reported Export Status n=348	Percentage
Sustain, 287 businesses	Sustain, n=267	**91%** [+/- 4%]
	Moved to Reassure, n=15	**7%** [+/- 4%]
Promote, 46 businesses	Promote, n=33	**73%** [+/- 14%]

Source: Composite measure merging data from several variables. Shaded values represent movements not logically possible so may represent respondent error. Data only includes respondents that provided details of their export status in both surveys.

3.6.4. Reported Export Contracts Achieved since receiving the service: Export Opportunities

Businesses that reported that they had exported were asked if they had won any new export contracts, or extended any existing contracts in the 12 months since using the Export Opportunities service. They were asked to think of all contracts, not just those assisted by the Export Opportunities service or DIT.

Of the 78% of businesses that exported (281 businesses), 82% reported that they had won any new overseas business contract and/or had gained extensions to existing overseas business contracts in the year since they used the service.

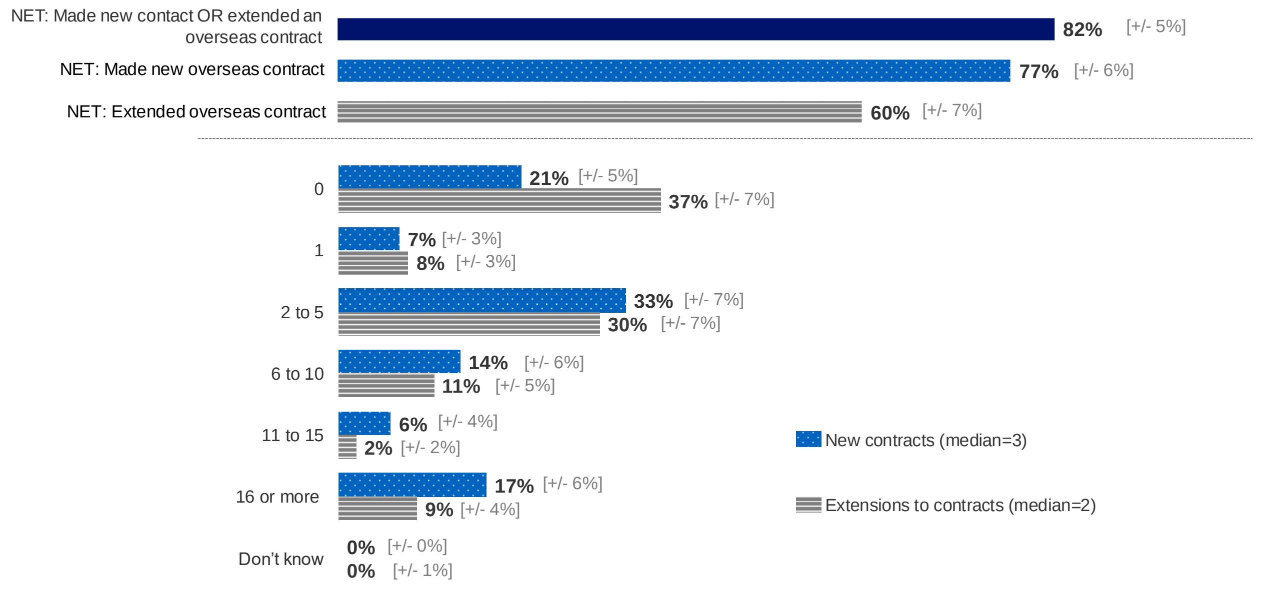
Of the 78% of businesses that exported, three-quarters (77%) of these exporting businesses reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.6.5). Seven per cent had won one overseas contract, with one in three (33%) winning between two and five. One in six (17%) businesses had won more than fifteen overseas contracts, while four per cent had won more than fifty contracts.

The median number of contracts won among exporting businesses that used the Export Opportunities service was three (this is taken from the 74% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

Six in ten (60%) exporting businesses that used the Export Opportunities service reported they had gained extensions to existing overseas business contracts in the year since they used the service. Eight per cent extended one, one in three (30%) between two and five, 11% between six and ten, and 11% extended more than ten existing overseas sales contracts. Five per cent had extended more than 30 contracts. Around four in ten (37%) businesses had not extended any existing contracts.

The median number of contracts extended (including those that did not extend any) was two.

Chart 3.6.5 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contract made in previous 12 months - Export Opportunities[113]



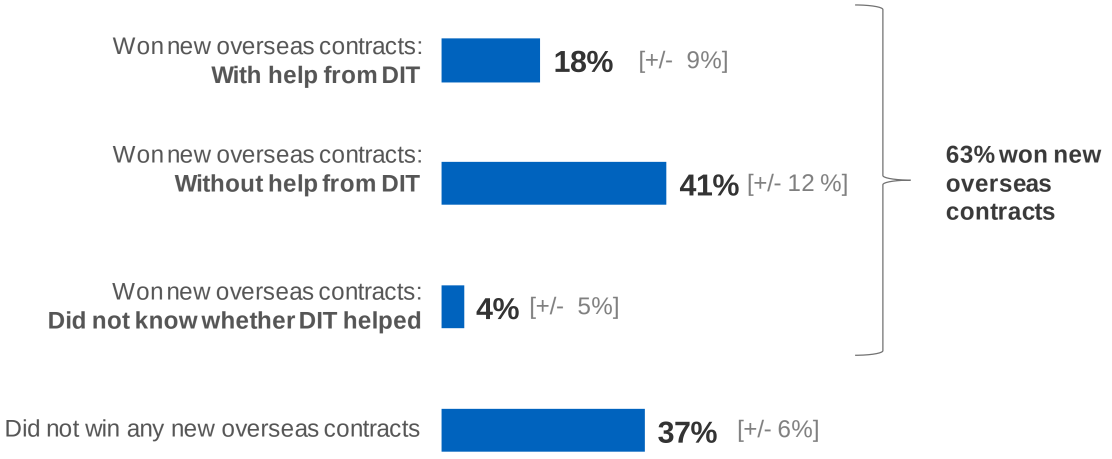
Q_Newcontract– Firstly, how many new overseas business contracts for export sales did you win in the past year?
Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
Base: All respondents that used Export Opportunities and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (281)

Reported additional contracts which were gained because of DIT support - Export Opportunities

Looking at all business that used Export Opportunities (including those that were not currently exporting and those that did not win any contracts or contract extensions), 18% said they won contracts with the assistance of the Export Opportunities service or DIT[114], 41% won one or more contracts without the assistance of DIT and four per cent were not able to say.

[113] The total percentage of all responses for this question add up to above 100 per cent because of rounding.
[114] Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.6.6 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – Export Opportunities

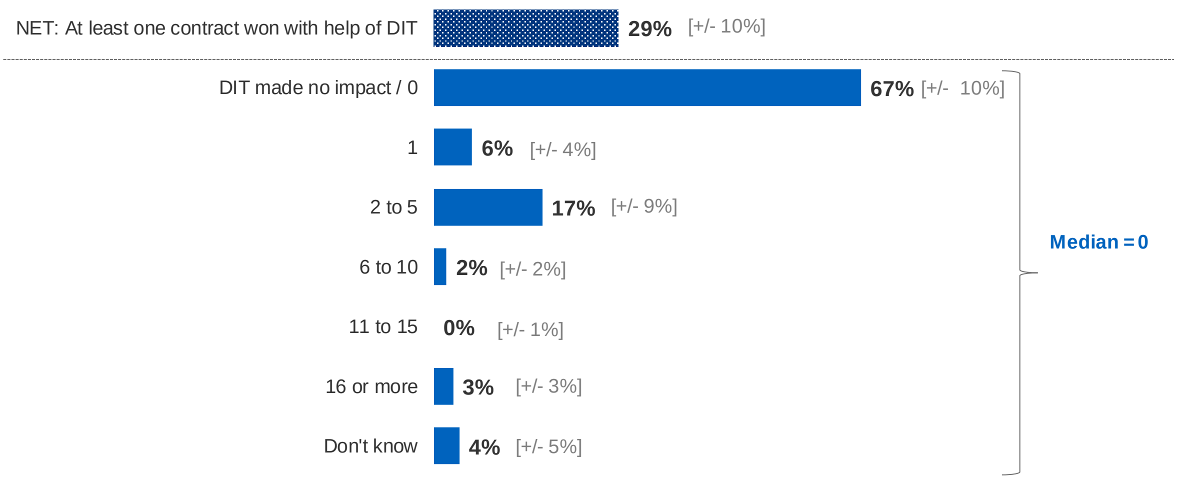


Base: All respondents that used Export Opportunities (348)

The section below **only includes results for 148 businesses, that is 43% of the businesses that were interviewed. These are businesses that both exported, won at least one new contract in the 12 months since their interaction with the service, *and* could estimate the number of contracts won with the assistance of the service or DIT** - this includes businesses that said DIT made no impact on the number and value of new overseas business contracts they won. The remaining 57% of businesses interviewed did not meet these criteria and therefore were not asked the following questions.

Businesses that won at least one new contract were asked how many of these were won with the help of DIT in the last 12 months. As shown in Chart 3.6.7 below, two in three businesses (67%) said they won no new overseas sales contracts with the help of DIT, or DIT made no impact. Around one in twenty (6%) had won one new overseas sales contract, and 17% between two and five. Three per cent won more than 15 overseas sales contracts due to DIT support.

Chart 3.6.7 Number of new overseas contracts that said to be won with the help of DIT in the last 12 months (including all those who said DIT made no impact) - Export Opportunities



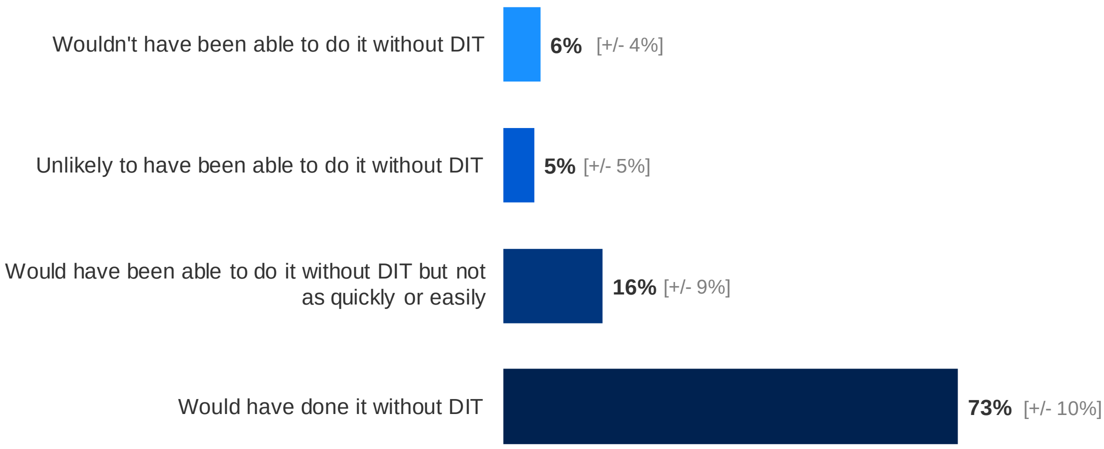
Q_ContractDIT - Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?
Q_ContractNumber–How many new overseas contracts were won with help from DIT
Base: All respondents that used Export Opportunities and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (148)

Importance of DIT's support in winning overseas contracts - Export Opportunities

The 41% of businesses that exported, won at least one new contract in the 12 months since their interaction with Export Opportunities and could estimate the number of contracts won with the assistance of the service or DIT (excluding those that answered 'don't know') were asked how important this help was. To understand the support the service provided for this analysis, **exporting businesses who said that DIT made no impact / did not help them win any new contracts were not asked this question directly but have been included in the 'would have done it without DIT' code below**.

A quarter of these businesses reported that DIT was important in helping them win these contracts. Six per cent of those who won at least one new overseas contract said they would not have been able to do it without DIT and five per cent thought it was unlikely they could have done it without DIT. A further 16% thought they would not have been able to do it as quickly or easily without DIT (Chart 3.6.8). The remaining three-quarters (73%) thought they would have been able to achieve the same outcome without DIT support.

Chart 3.6.8 How important DIT's help was in winning overseas contracts - Export Opportunities



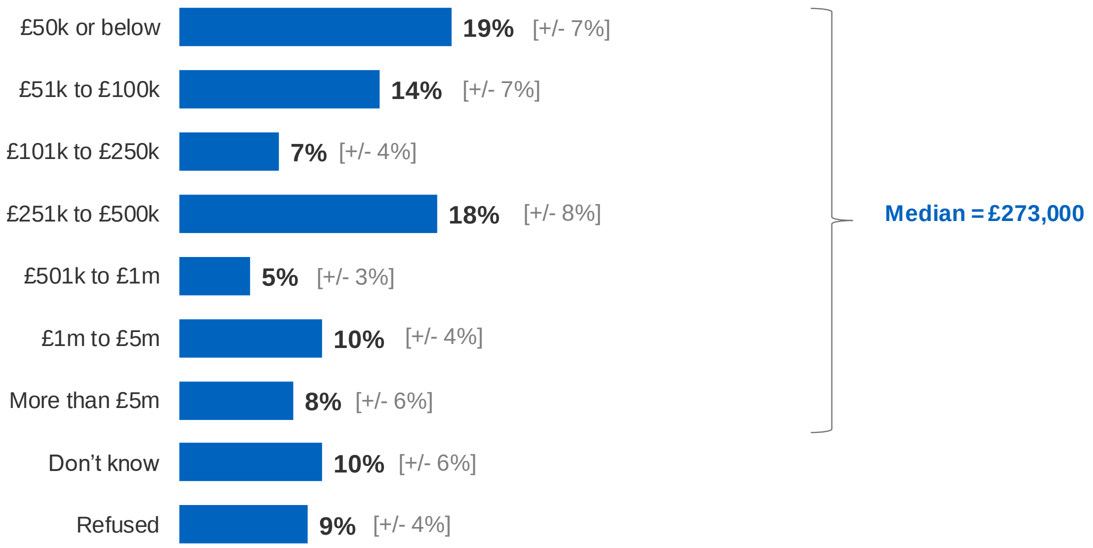
QContractHelp – How important was DIT's help in winning these overseas contracts?
Base: All respondents that used Export Opportunities respondents who won any new overseas contracts in the past year (143)

3.6.5. Reported value of export sales achieved since receiving the service: Export Opportunities

Reported value of the export sales of new contracts - Export Opportunities

The businesses that reported winning any new overseas contracts (excluding extensions to existing contracts) were asked the value of the export sales of those contracts in total (Chart 3.6.9). The median value of the export sales of all new overseas contracts for these businesses was £273,000. One in five (19%) won contracts with export sales value of £50,000 or below. Around one in five (18%) said that the value of the new overseas contracts was worth more than £1 million.

Chart 3.6.9 Value of all new overseas contracts made in previous 12 months - Export Opportunities



QcontractValue – What is the value of all these new overseas business contracts for export sales?
Base: All respondents that used Export Opportunities and won any new overseas sales contracts (207)

3.6.6. Summary of reported impact as a result of DIT support: Export Opportunities

This section summarises the analysis on reported additional impact which aims to estimate the additional impact that DIT services had on businesses, this impact would not have happened without DIT's support.

Looking at all businesses supported by Export Opportunities interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), around eight in ten (78%) were exporters, meaning they were exporting at the time of service use or in the last 12 months.

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this[115].

115 The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

Chart 3.6.10 Summary of businesses supported by Export Opportunities[116]

Base: All respondents that used Export Opportunities (348)

3.6.7. Exposure and growth within new markets: Export Opportunities

All businesses that used Export Opportunities were asked whether they received increased exposure or started doing business in any new markets because of their interaction with Export Opportunities[117]. One in seven (15%) had been exposed to at least one new market and one in ten (10%) had started doing business in at least one new market as a result of using the Export Opportunities service.

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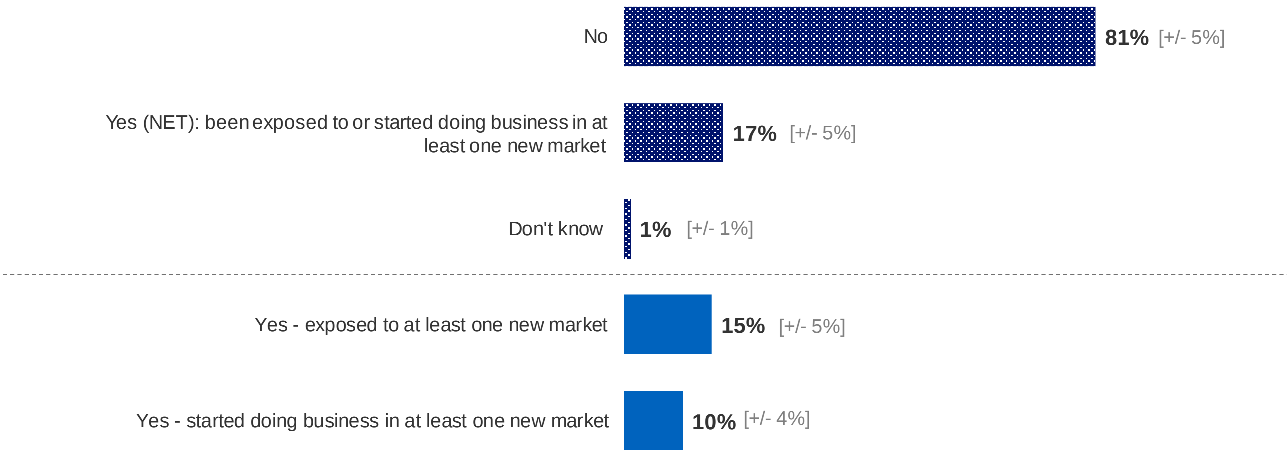
[116] In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 29% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so 29% * 63% = 18%. Find more information about how this was calculated in the technical report.

[117] Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

Chart 3.6.11 Whether increased exposure or starting business in a new overseas market - Export Opportunities



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SERVICE]?
Base: All respondents who used Export Opportunities (348)

Starting to do business in a new market or exposure to a new market was more frequent among those who in the Quality Survey gave a high rating (nine or ten) when asked about the likelihood of recommending using Export Opportunities (31%) than businesses that gave a low score (between zero and six) (5%).

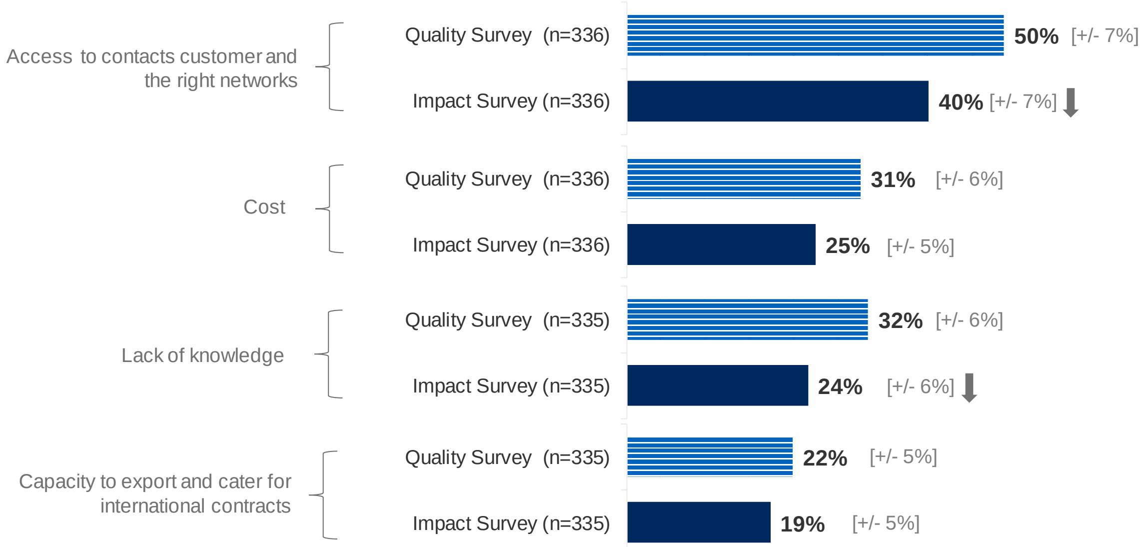
3.6.8. Barriers to exporting: Export Opportunities

Businesses were asked in both the Quality Survey and Reported Impact Survey about some **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 0 (not a barrier at all). This section compares results from between surveys for businesses who completed both surveys and provided a response to this question in both surveys[118].

The proportion of businesses that said ‘access to contacts, customers and the right networks’ or ‘lack of knowledge’ were barriers to exporting (rating of 7 to 10 out of 10) significantly decreased between the Quality Survey and RIS (Chart 3.6.12). There were no significant changes in the proportion of businesses that said ‘cost’ or ‘capacity’ was a barrier to exporting.

[118] Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.6.12 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Export Opportunities[119]



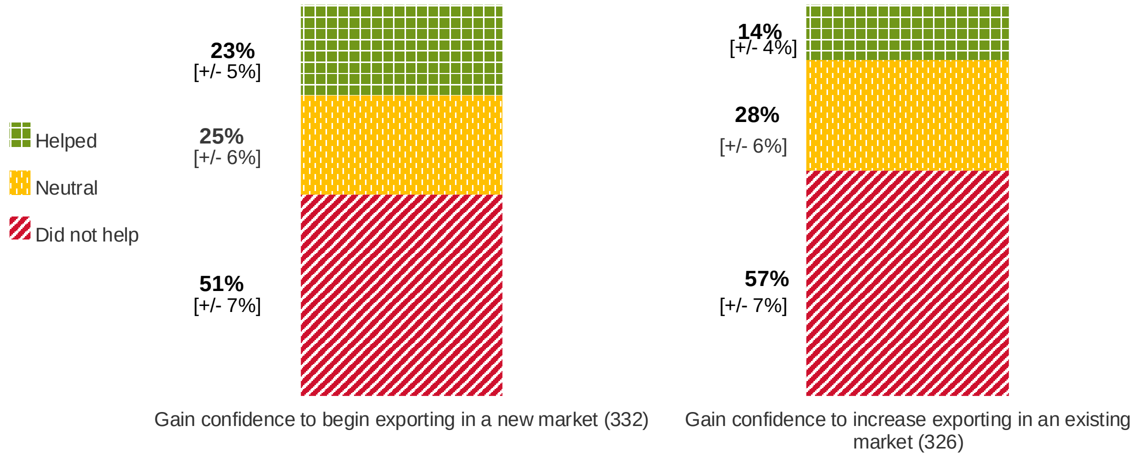
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export Opportunities except those giving a 'not applicable' answer

3.6.9. Wider benefits of service: Export Opportunities

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market using a similar rating scale as above. More than two in ten businesses said that using the Export Opportunities service helped them gain confidence to begin exporting in a new market (23%) and one in seven (14%) said it helped them to gain confidence to increase exporting in an existing market. Over half of businesses said it did not help them (51% and 57% respectively).

[119] The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Chart 3.6.13 To what extent experience of the service helped to build confidence in exporting - Export Opportunities

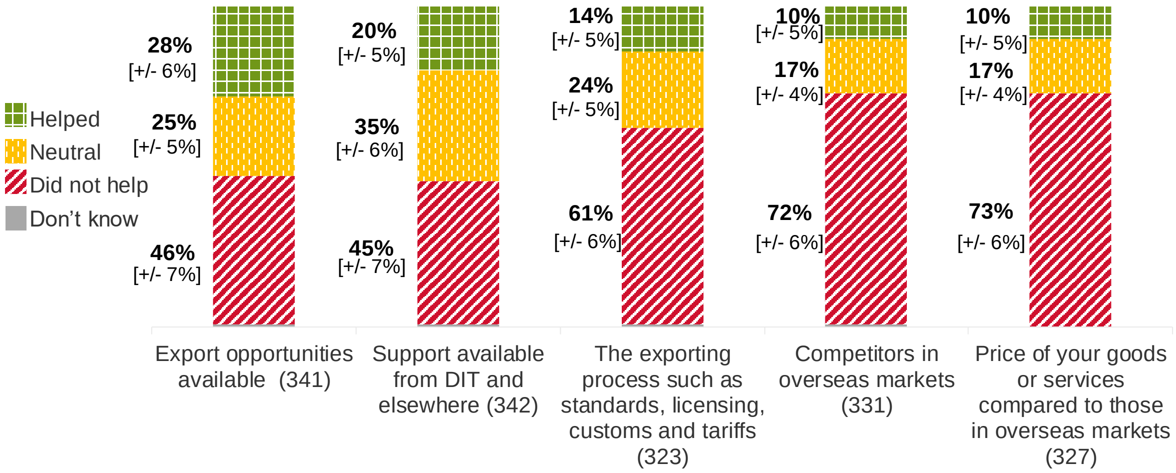


QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of Export Opportunities help you to?
Base: All respondents that used Export Opportunities except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.6.14 shows the items that were asked of businesses that used Export Opportunities. This shows that:

- Over a quarter (28%) of businesses that had used Export Opportunities said that the service helped them improve their knowledge of the export opportunities available, but a higher proportion (46%) said that the service did not help them in this way.
- Two in ten (20%) businesses that had used Export Opportunities said the service helped by increasing their knowledge of the support available from DIT and elsewhere, whilst more than four in ten (45%) said the service did not help in this way.
- Businesses that used Export Opportunities were more likely to say that the service did not help them improve their knowledge than they were to say it helped improve it for their knowledge of:
  - the exporting process;
  - competitors in overseas markets and;
  - price of goods or services compared with those in overseas markets.

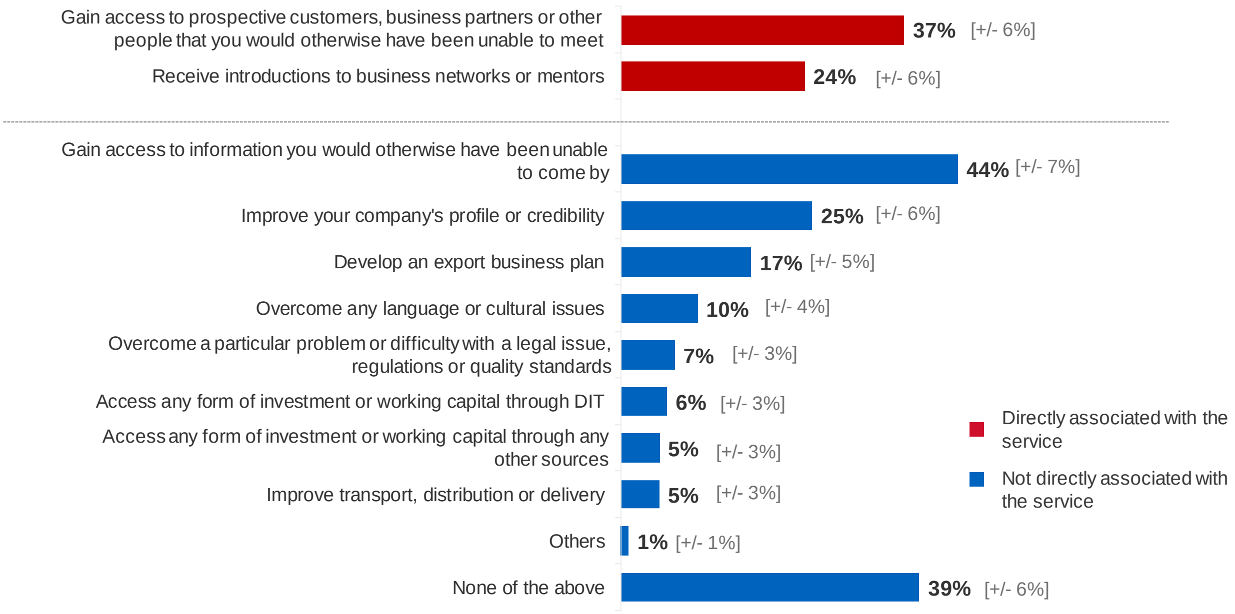
Chart 3.6.14 To what extent the business felt it has improved its knowledge as a result of using the service - Export Opportunities



QImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of Export Opportunities? Base: All respondents that used Export Opportunities except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using the Export Opportunities service in the year between dealing with Export Opportunities and the RIS interview. A detailed breakdown of responses is shown in Chart 3.6.15, where activities in red show those most closely associated with the service. The most frequent responses from a pre-coded list were to gain access to information that they would have otherwise been unable to come by (44%) and gain access to prospective customers (37%). A quarter improved the company's profile or credibility (25%), and a similar proportion received introductions to business networks or mentors (24%). Just under two in ten developed an export business plan (17%).

Chart 3.6.15 In what ways has the business felt it had benefited from DIT support - Export Opportunities[120]

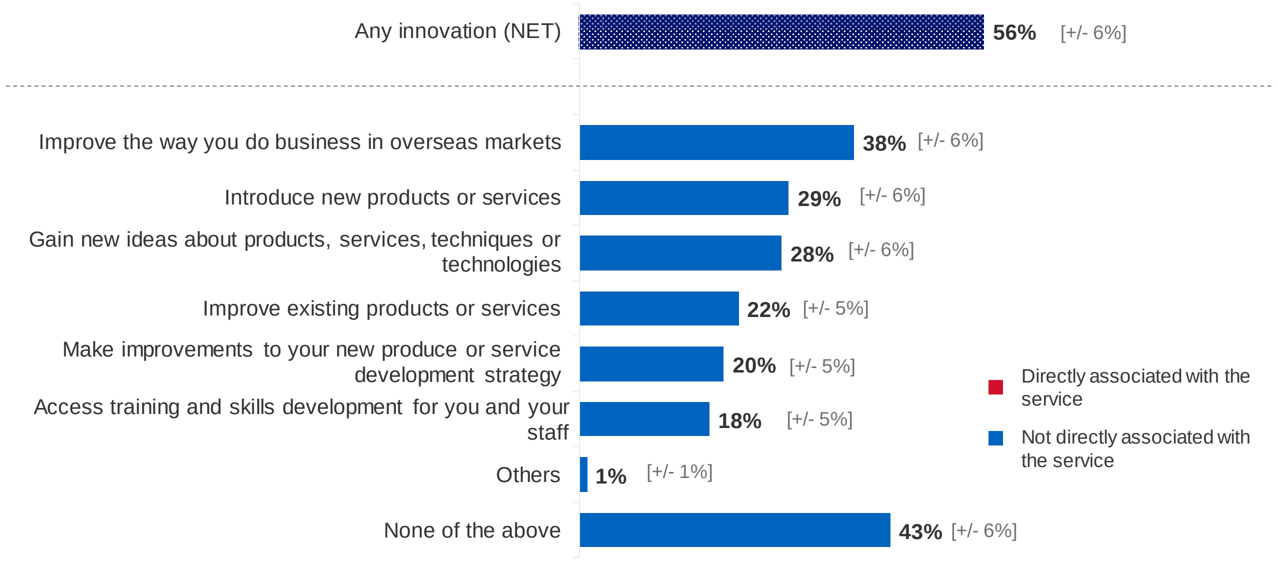


QServiceBenefit – In which of the following ways if any, has your business benefited specifically from Export Opportunities over the last year?
Base: All respondents who used Export Opportunities (348)

Businesses were asked whether using the Export Opportunities service has helped, or will help, support innovation and development as a business. None of the answer codes presented were directly associated with the service. However, more than a half (56%) of businesses said that using the service helped them with innovation or development in some way. The most common response was to 'improve the way you do business overseas' (38%). Around a three in ten (29%) said that using the Export Opportunities service helped them to introduce new products or services, or gain new ideas about products or services (28%). Two in ten (22%) said it helped them to improve existing products or services, or make improvements to new product or service development strategy (20%). Eighteen per cent said the service helped them to access training and skills development.

[120,19] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.6.16 Whether the service has / will help innovation and development - Export Opportunities [121][122]



QInnovationSupport – Still thinking of Export Opportunities, has this service helped or do you expect it to help your business with development and/or innovation? Specifically…
Base: All respondents who used Export Opportunities (348)

International contacts

Businesses were asked how many overseas contacts they had made as a result of using the Export Opportunities service over the past year (Chart 3.6.17). Just under four in ten (38%) businesses made at least one new overseas contact in the year since using the Export Opportunities service. Five per cent made one new overseas contact, and two in ten (19%) made between two and five new contacts. Eight per cent of businesses made between six and ten new overseas contacts, and six per cent made more than ten new contacts. Six in ten (60%) reported that they had not made any new contacts as a result of using the Export Opportunities service.

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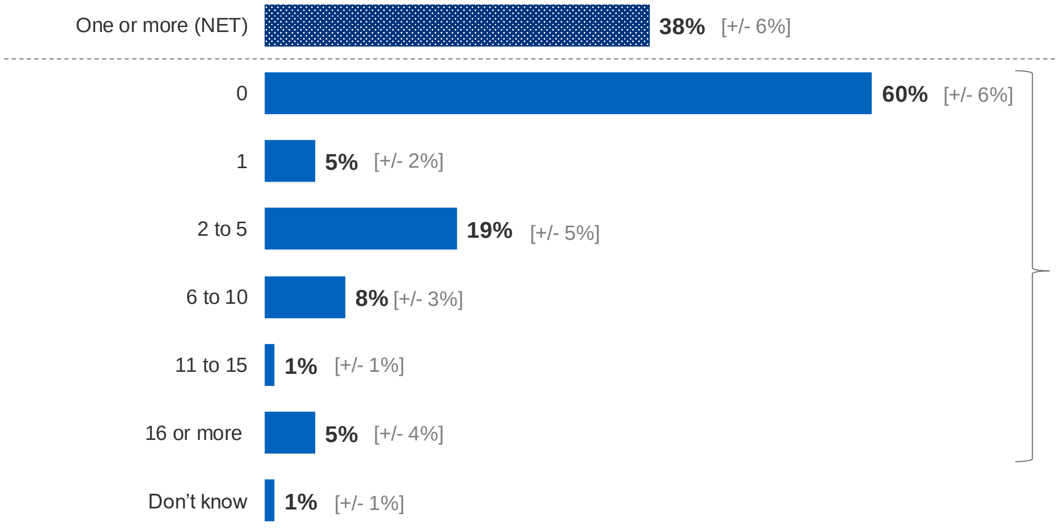
[121] The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.
[122] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

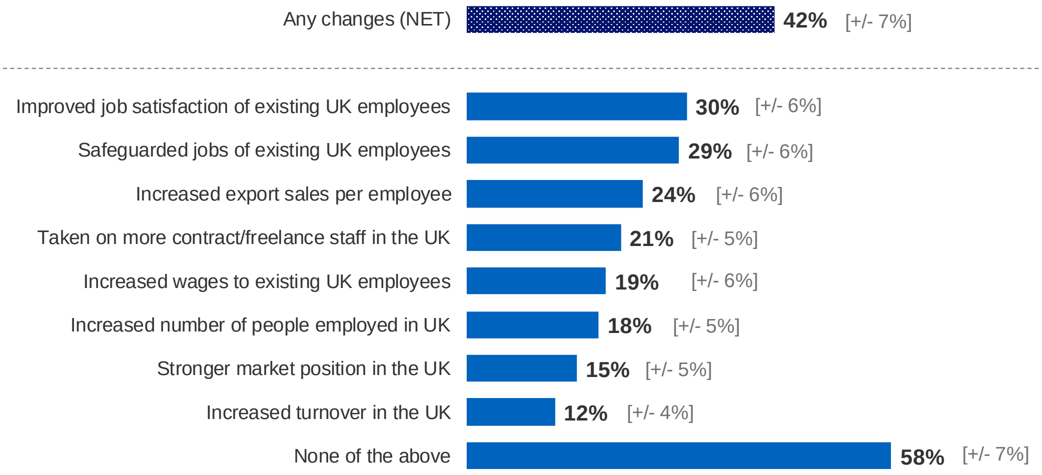
Chart 3.6.17 Number of new overseas contacts made in previous 12 months - Export Opportunities



Q_ContactsMade –How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
Base: All respondents who used Export Opportunities (348)

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Export Opportunities service. Three in ten businesses (30%) thought they had or would see improved job satisfaction of existing UK employees. Three in ten (29%) thought they had or would safeguard jobs of existing UK employees, and a quarter (24%) had or would increase export sales per employee as a direct result of using the service. Two in ten businesses (21%) had or would take on more contract or freelance staff in the UK, or increase wages to existing UK employees (19%). Eighteen per cent of businesses mentioned increasing the number of people employed in the UK. Fifteen per cent felt using the service had or would result in a stronger market position, and one in ten (12%) mentioned increased turnover in the UK.

Chart 3.6.18 Changes expected / seen in the UK business as a result of receiving the service - Export Opportunities [123]



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of Export Opportunities?
Base: All respondents who used Export Opportunities (348)

3.6.10. Actions taken as a result of the service: Export Opportunities

Businesses were asked about the actions they had taken following their use of the Export Opportunities service (Chart 3.6.19). More than half (53%) reported that they had identified new export opportunities or made new contacts. Over four in ten (44%) said they researched the paperwork and regulations needed to export, and three in ten (31%) had made investments to support exporting or looked for any other export support services (28%). Two in ten of businesses said they had made a deal that will yield exports (22%), started or increased exporting (20%) or used other export services (19%). Of the 84 businesses that were not exporting, over half (58%) had assessed the company's readiness to export.

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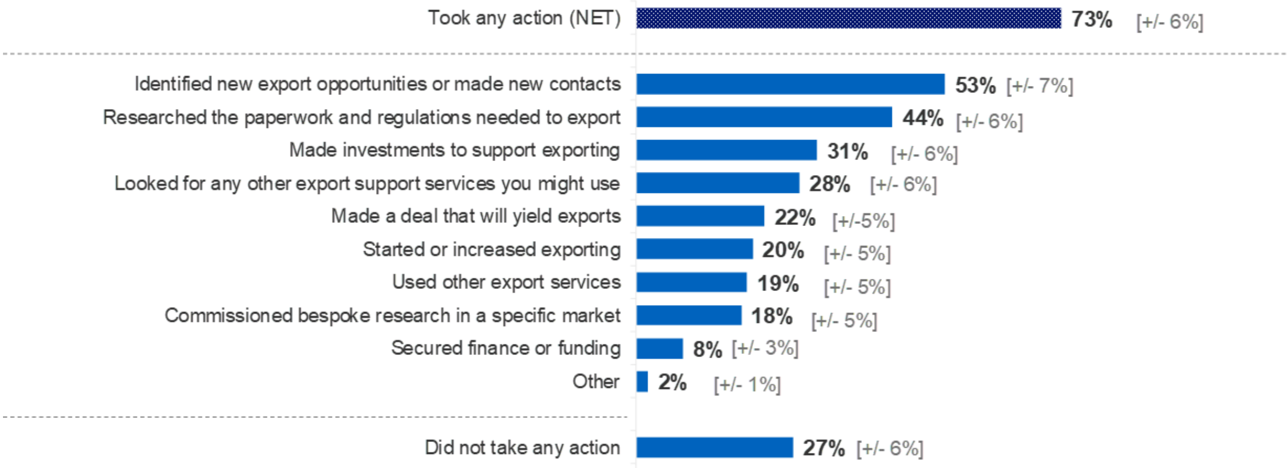
[123] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.6.19 What the business has done as a result of receiving the service - Export Opportunities [124] [125]



QResultService - What has your business done as a result of [SAMPLED SERVICE]?
Base: All respondents who used Export Opportunities (348). The net score also includes non-exporters who assessed their readiness to export.

Businesses that had made an investment as a result of using the Export Opportunities service were asked what investments they had made (105 respondents). The most common investment was an increase in the amount of marketing and sales activity (82%), followed by increasing the number of staff (62%). Six in ten (61%) made any R&D investment and around half (48%) made any capital investment. Two in ten (19%) bought or leased commercial property.

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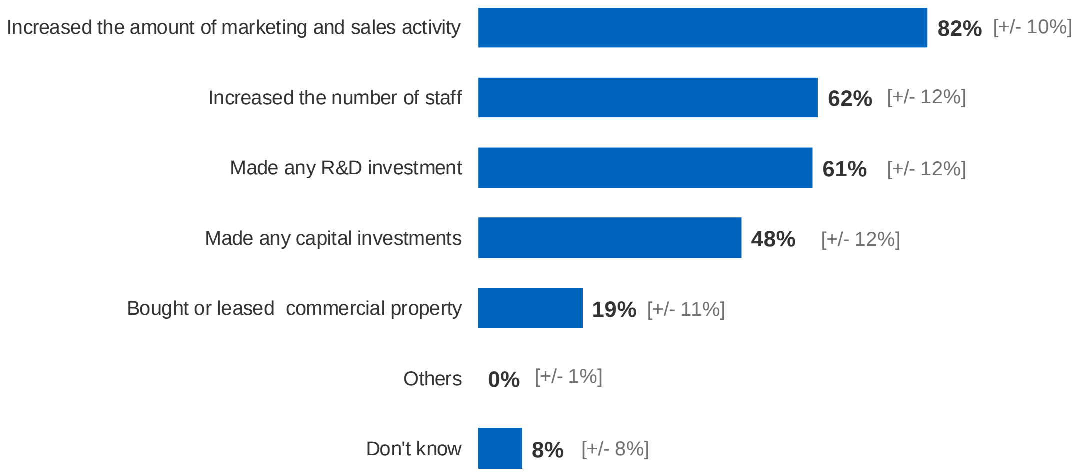
124 The 'Took any action (NET)' groups together all responses from the question apart from responses of 'Did not take any action'.

125 The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.6.20 Type of investments made to support new or increased export opportunities following using Export Opportunities [126] [127]



QInvestmentMade - Which of the following investments has your business made to support new or increased export opportunities?
Base: All respondents who made investments to support exporting as a result of using Export Opportunities (105)

Businesses were asked what organisations they had been in contact with since using Export Opportunities. Just over half of businesses had been in touch with public organisations such as the Chambers of Commerce in the UK (33%), Innovate UK (16%) or UK Export Finance (12%). Half (47%) had not been in contact with any other organisations regarding assistance with overseas trade.

[126] The 'Any investment made (NET)' groups together all responses from the question apart from 'don't know' responses.
[127] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.6.21 What organisations respondents have been in contact with since receiving the service - Export Opportunities[128]

QAnyContact – And again, since your business used Export Opportunities in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities?
Base: All respondents who used Export Opportunities (348)

[128] The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Appendix 1: Reporting exporting outcomes based on 'all respondents'

There are several charts within the RIS report (such as chart 3.2.12) which report on the proportion of all service users that DIT helped win new overseas business contracts. It is important to note that not all exporting businesses were asked about the amount of help given by DIT for these new overseas sales contracts.

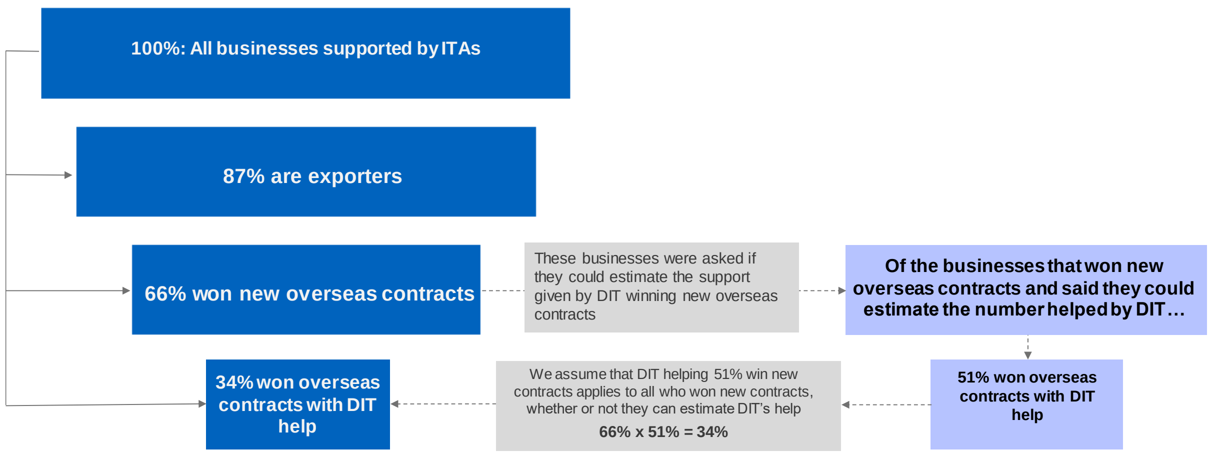
Cognitive testing of the questionnaire suggested that not all respondents that had won any new overseas sales contracts would be able to provide an answer about the number of these contracts that were helped by the DIT product or service that we were asking about, or about DIT help as a whole.

Businesses that answered yes to questions Qcontractservice[129] or Qcontractdit[130] were asked a series of questions about the impact of DIT services on their new overseas business contracts. Businesses that answered no were not asked about the levels of assistance given by DIT in helping them win new overseas contracts. Therefore, a proportion of those that had won any new overseas business contracts were not asked questions about DIT help on their 'export sales'.

In order to calculate data based on the proportion of all businesses that DIT helped win any new overseas business contracts an additional calculation was necessary. The assumption was made that the proportion of businesses 'helped' by DIT was the same for those that could provide an estimate as it was for those that could not provide an estimate.

The proportion of businesses that won new overseas contracts was multiplied by the proportion of businesses that won new overseas contracts that could both estimate the number helped by DIT and had won any as a result of DIT help. If the respondent said "No- DIT made no impact" then they were given a response of 0 contracts helped by DIT.

The chart below shows the process.



[129] *Qcontractservice: Do you think you are able to estimate the number and value of new overseas business contracts that your business won in the last 12 months that were helped by [SAMPLED SERVICE]?*

[130] If the answer to Qcontractservice above was not "Yes" the respondent was asked QcontractDIT:*QcontractDIT: Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?*

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Any enquiries regarding this publication should be sent to us at enquiries@trade.gov.uk

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