Department for
Business & Trade

Export client quality survey for businesses supported April 2021 to March 2022

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

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1. Executive Summary

1.1. Introduction

The Department for International Trade (DIT) is responsible for promoting exports, both in terms of driving demand from overseas, and encouraging UK businesses to export. DIT offers export promotion services to businesses that wish to seek support with exporting. It tracks the quality and reported impact of its export promotion services through monthly surveys, known as the Export Client Survey (ECS). The main aims of the ECS are to:

- Track client perceptions of quality of support and advice provided by DIT,
- Provide a measure of reported impact on businesses of DIT's services,
- Understand what drives performance and how services can be improved over time.

The ECS comprises two linked surveys: a Quality Survey and a Reported Impact Survey. This report presents findings from the Quality Survey[1]. The findings are based on 4,608 interviews conducted by Ipsos UK, among businesses that received support from DIT between April 2021 and March 2022. See Section 2.3, Table 2.3.1, below for descriptions of DIT's export promotion services covered by the ECS.

Businesses were classified as 'Sustain', 'Reassure' or 'Promote' depending on their export status.

- 'Sustain' are those businesses that were currently exporting,
- 'Reassure' are those businesses that had previously exported but not in the past 12 months,
- 'Promote' are those businesses that had never exported before.

1.2. International Trade Advisers (ITAs)

The net promoter score (NPS), a summary of how likely it is that businesses would recommend using the service or product, for ITAs was +48, which was a rise compared to +41 in the previous year. The NPS has risen by +11 from 2019/20, demonstrating a two-year upwards trend in the likelihood that respondents will recommend the use of ITAs as a service. Businesses were positive about the ITA service and were likely to recommend it to colleagues and business associates. Over six in ten respondents (63%) were 'Promoters', and one in seven (14%) were 'Detractors'.

Satisfaction with ITAs remained consistent with the previous year (83% compared to 80% in 2020/21), and the likelihood that businesses would not recommend the service decreased (14% compared to 18% in 2020/21).

Compared to the previous year, businesses were more positive about the clarity of the steps they needed to take when using the service and after the service (both up 4% from the previous year).

However, more businesses were more likely to report their capacity to export and cater for international contracts was a barrier to exporting this year (24% compared to 20% in 2020/21).

[1] Only statistically significant differences (at the 95% confidence level) are reported. The confidence intervals will vary between services, due to differences in base sizes.

1.3. Export Academy

The NPS for Export Academy was +34. Businesses were mostly positive about the Export Academy service. Over half of respondents (52%) were ‘Promoters’, and under a fifth (17%) were ‘Detractors’.

Most Export Academy businesses were largely satisfied with the service. Around three quarters of respondents (78%) said they were satisfied with their experience and four percent said they were dissatisfied.

1.4. Posts

The NPS for Posts was +25, in line with the previous year (+23 in 2020/21). Around half of respondents (47%) were ‘Promoters’ and one in five (21%) were ‘Detractors’.

Satisfaction with Posts remained also unchanged from the previous year (73%, as in 2020/21).

Posts businesses were more likely to have made investments to support new or increased export opportunities compared to the previous year. Specifically, businesses were more likely to have increased their marketing and sales activity (89% compared to 76% in 2020/21), increased the number of UK staff (67% compared to 42% in 2020/21) or increased the number of staff abroad (45% compared to 25% in 2020/21).

However, Posts businesses were less likely to have taken other actions as a result of using Posts. Specifically, businesses were less likely to say they had identified new export opportunities or made new contacts (58% compared to 67% in 2020/21), researched the paperwork and regulations needed to export (37% compared to 49% in 2020/21), or started or increased exporting (21% compared to 30% in 2020/21).

1.5. Webinars

The NPS for Webinars was +13, in line with the previous year (+14 in 2020/21). Just over a third of respondents (37%) were ‘Promoters’ and a quarter (25%) were ‘Detractors’. Satisfaction with Webinars also remained consistent with the previous year (67% compared to 68% in 2020/21).

Attitudes to the advice and support provided by the Webinars service were mostly in line with the previous year. Fewer businesses gave negative ratings about the clarity of the steps they needed to take when using the service (4% compared to 7% in 2020/21). However, businesses were less likely to be positive about the Webinars registration process (88% thought this was straightforward, compared to 91% in 2020/21).

Respondents were more likely to report barriers to exporting than in the previous year. Specifically, this applied to access to networks (37% compared to 29% in 2020/21) and capacity to export and cater for international contracts (27% compared to 19% in 2020/21). However, when asked whether using Webinars had helped them to overcome these barriers to exporting, businesses were more likely to report that using Webinars had helped them understand how to increase their knowledge of the exporting opportunities that were available (52% compared to 41% in 2020/21).

As a result of using this service, more businesses said they had identified new export opportunities or made new contacts (49% compared to 35% in 2020/21).

1.6. Export and Investment Teams

Businesses' likelihood of recommending the Export and Investment Teams service decreased from the previous year (NPS of +12, compared to +30 in 2020/21). Two in five (39%) were 'Promoters' of the Export and Investment Teams service, while a quarter (27%) were 'Detractors'.

Almost seven in ten (68%) were satisfied with the service. Businesses were most positive about staff knowledge (80%) followed jointly by the clarity of steps they needed to take when using the service and quality of contacts they were provided with (66%).

Businesses had taken a range of actions as a result of using Export and Investment Teams. More than half (55%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all businesses, three-quarters (74%) said they had identified new export opportunities or made new contacts, while more than two in five (43%) had researched the paperwork and regulations needed to export.

1.7. Export Opportunities

The NPS for Export Opportunities was -23, which was in line with -15 in the previous year. Around a quarter (23%) of respondents were 'Promoters' but around half (46%) were 'Detractors'.

The proportion of businesses who felt the service met their needs overall (46%) was in line with 2020/21 (45%). However, more businesses said that the service did not meet their needs (32%) than in the previous year (26% in 2020/21).

Satisfaction with the Export Opportunities service remained in line with the previous year. Around half of respondents (48%) said they were satisfied with their experience, while three in ten (28%) said they were dissatisfied.

2. Introduction

2.1. Background to the research and objectives

The Department for International Trade (DIT) is responsible for promoting exports, both in terms of driving demand from overseas and encouraging UK businesses to export.

In 2021, DIT refreshed its Export Strategy[2], based on:

- Supporting, encouraging and inspiring UK businesses to drive sustainable international growth,
- Promoting UK exporters in markets where the UK has signed (or is negotiating) free trade agreements,
- Informing businesses by providing information that will benefit them from trade agreements and make it easier to trade,
- Connecting UK businesses with overseas buyers, international markets and peer-to-peer support,
- Supporting businesses globally to take advantage of preferential terms the UK has secures, no matter what stage they are at in their export journey.

As part of this, DIT offers export promotion services to businesses that wish to seek support with exporting. This includes, for example, support through International Trade Advisers (ITAs) who provide businesses with impartial face-to-face advice, to help them to identify the services and support they need to grow internationally. Table 2.3.1 below provides an overview of the services that DIT provides which are in scope of this research.

2.2. The Export Client Survey

DIT tracks the quality and reported impact of its export promotion services through monthly surveys known as the Export Client Survey (ECS). The main aims of the ECS are to:

- Track client perceptions of quality of support and advice provided by DIT,
- Provide a measure of reported impact on business of DIT's services,
- Understand what drives performance and how services can be improved over time.

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. This report presents findings from the Quality Survey. This is a telephone survey reporting on the number of unique businesses supported by DIT, the perceived quality of the advice and support, and firms' satisfaction with the service received by product or service. The findings in this report are based on interviewing businesses who used DIT services between April 2021 and March 2022 (2021/22). Throughout this report, when findings from businesses that used DIT services in 2021/22 are compared to findings from the 2020/21 survey, these are statistically significantly different at the 95% probability level.

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[2] Export Strategy 2021

2.3. Sample frame and fieldwork

Table 2.3.1 below provides an overview of the services that DIT provides which are in scope of this research:

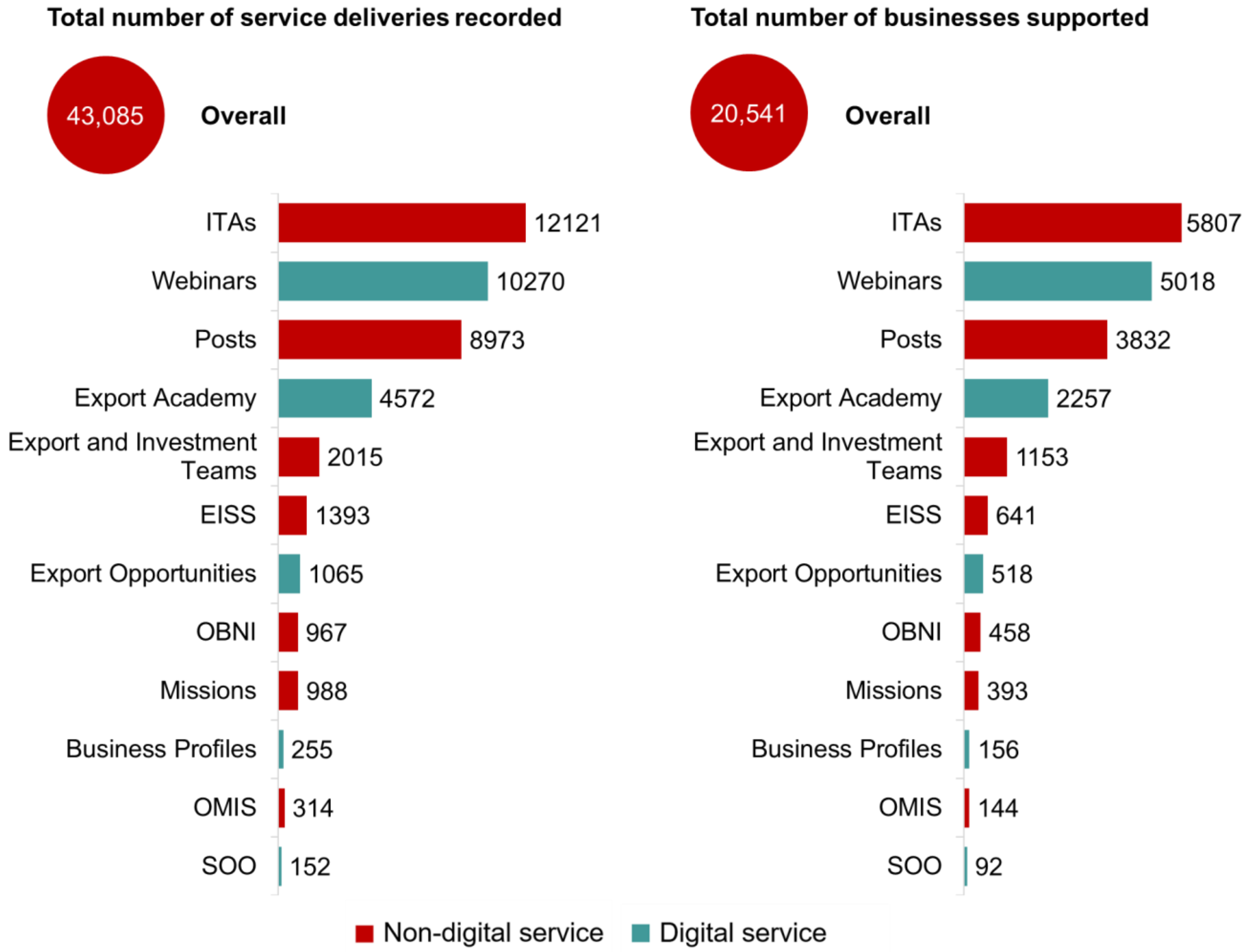
Table 2.3.1 DIT export promotion services

Service	Service description	Digital or non-digital	Interviews achieved (2021/22)
International Trade Advisers (ITAs)	Provides businesses with impartial face-to-face advice, to help them to identify the services and support they need to grow internationally.	Non-digital	1,479
Missions	Services related to events (trade fairs and market research) but with a specific focus on face-to-face deal-making.	Non-digital	73
Export Academy	Gives businesses the know-how to sell to customers around the world by learning from experts in international trade.	Digital	654
Selling Online Overseas (SOO)	An online service containing details of some of the leading e-marketplaces and details of special deals negotiated by DIT.	Digital	21
Posts	An overseas network that provides in-depth knowledge of local markets, and access to reliable contacts to enhance UK firms' export competitiveness.	Non-digital	685
Enhanced International Support Service (EISS)	Provides information and advice to small and medium-sized businesses looking to export to particular overseas markets.	Non-digital	94
Webinars	Aim to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting.	Digital	1,155
Export and Investment Teams (Sector Teams)[3]	Work directly with industry and the international network to facilitate collaboration between UK businesses, co-ordinate government to government engagement, and support trade missions.	Non-digital	166
Overseas Business Network Initiative (OBNI)	Provides information about an overseas market and contacts for possible customers or business partners. It can also provide other help, such as planning and organising events or promotional activity in overseas markets.	Non-digital	49
Overseas Market Introduction Service (OMIS)	Provides information about an overseas market and contacts for possible customers or business partners. A charged service delivered by staff at British Embassies and Consulates overseas.	Non-digital	23
Business Profiles	An online service which enables businesses to promote products and services to international buyers.	Digital	29
Export Opportunities	An online service on great.gov.uk which promotes global exporting opportunities to UK businesses	Digital	102

[3] Referred to as Sector Teams in 2020/21 sampling and fieldwork (and in this report) but renamed during 2021.

In total, there were around 43,000 recorded service deliveries related to the services covered by the ECS between April 2021 and March 2022. From these records, around 20,000 individual unique 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 an insufficient sample being available.

Chart 2.3.1: Service deliveries recorded and businesses supported, by service type (April 2021 to March 2022)[4]



2.3.1. Fieldwork

Interviews were conducted using Computer-Assisted Telephone Interviewing (CATI). All respondents were sent an email prior to being contacted, to let them know the purpose of the research and provide them with an opportunity to contact Ipsos UK to ask any questions or opt out of the research. Fieldwork for this report began in July 2021 (interviewing businesses who received support from DIT in April 2021). This report covers DIT services delivered between April 2021 and March 2022. The mean interview length was 21 minutes and 23 seconds.

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[4] All 313 eligible Business Profiles service deliveries corresponded to an individual unique business supported, i.e. all businesses were sampled, and there was no overlap with other services.

2.4. Methodology

2.4.1. Sample design

The Quality Survey is based on a monthly sample of businesses which have used a DIT export promotion service. The sample is designed to be representative of businesses supported by DIT, permitting analysis of each service. The sample design and selection take into account the longitudinal aspect of each business' interactions with DIT products and services, i.e. the varying combinations of historic service deliveries received by a business. Survey questions and analysis of the survey data focus on a single 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.

The sample was drawn from monthly records of service deliveries provided by DIT. These records do not include a unique business identifier. Therefore, each month, core business level information – business names, email domains, postcodes and telephone numbers – were used to identify where multiple records referred to the same business.

Certain records were not eligible to be sampled each month, including public sector businesses, businesses with non-UK telephone numbers, and those that had been sampled in a previous month for the ECS[5].

Where a sampled business had received more than one service in the previous month, they were allocated a single main service for the survey. Businesses were given a higher probability of being allocated to less common services than more common services. This was to increase the number of responses related to the least common services.

There is normally a three-month period between when a business interacts with DIT and when the interview is conducted. For example, interactions in April 2021 were included within the July 2021 sample etc. This is part of the survey design to ensure the interaction was recent enough to be memorable. A number of measures were implemented to aid recall and minimise the impact of this on the data, such as sending respondents an advance email informing them about the survey or prompting respondents with the name of the service they used and when they used it.

Two services were added to the ECS for the first time in 2021/22. These were the Enhanced International Support Service (EISS) and Export Academy. There is no data available for 2020/21 for either of these services for comparisons.

[5] To reduce the burden of participating in research, a business is only included within the Quality Survey in any 12-month period.

2.5. Analysis

Many of the questions in the survey asked participants to rate their customer experience using a scale from zero to ten, where ten was the most positive response and zero 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)[6]. 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 generally included in the charts, unless no respondents gave this answer. However, where results are broken down by business turnover, ‘Don’t know’ and ‘Refused’ answers are excluded to maximise year-on-year comparability.

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.

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

Charts and tables in the report also display the Confidence Intervals (CI) for each survey question estimate. When a survey is carried out, the respondents who take part are only a subset of those in the population and as such may not give an exact representation of the ‘true’ average in the population. These Confidence Intervals indicate the range within which the true value lies.

In addition, 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.

Findings for Missions, Selling Online Overseas, Enhanced International Support Service, Overseas Business Network Initiative, Overseas Market Introduction Service and Business Profiles services have not been included in this report, due to small base sizes.

2.5.1. Weighting

The survey data is weighted to ensure that the achieved sample is as representative of the entire population of businesses supported as possible and accounts for (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 business was sampled for, for example, questions about the business 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 business was sampled.

[6] With the exception of Net Promoter Scores, where respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

2.6. Changes to the survey since the previous year

A number of changes were introduced to the survey questionnaire compared to the previous year (2020/21) in light of changes to service delivery and policy priorities. This included:

- A new question on whether the business won the contract they went for as part of the Export Opportunities service,
- A new question to measure readiness to export,
- New questions on the proportion of board members who are female or from an ethnic minority background,
- Changes to the format of the question around improvements to the service (from open ended to pre-codes),
- Changes to the question on awareness of DIT advertisements,
- Removal of all questions relating to the COVID-19 pandemic,
- Removal of all questions relating to pay and future plans,
- Additional breakdowns of export regions,
- Minor improvements to the wording of questions or scripting instructions.

A copy of the survey questionnaire and further detail on these changes can be found in the Technical Report.

3. Product findings

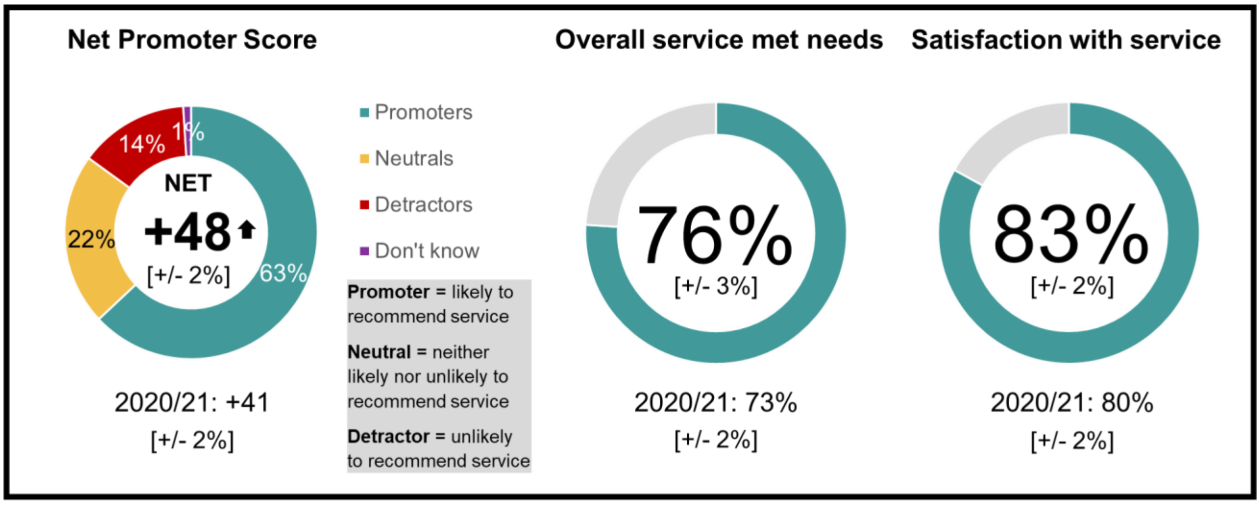
This chapter presents the key findings for each of the DIT services or products covered by the survey. Each service or product is covered in turn (ordered according to Net Promoter Score), with coverage of the key findings for the service or product; departmental metrics; and analysis of service or product performance. The analysis includes two key metrics:

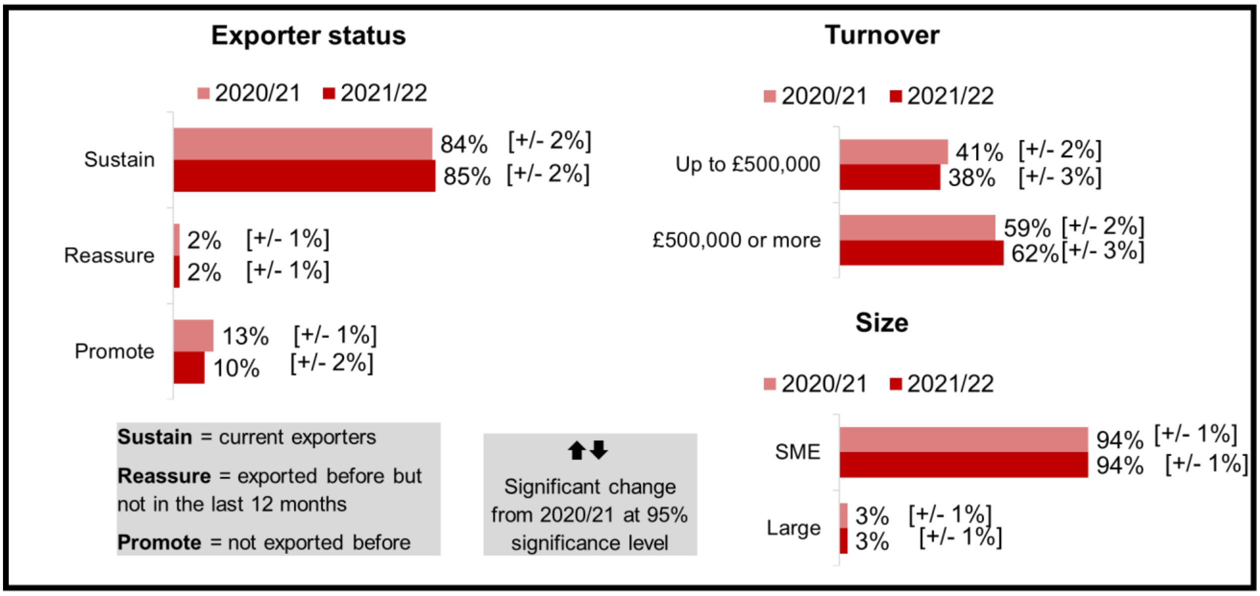
- **Net promoter score (NPS):** a summary of how likely it is that businesses would recommend using the service or product. Businesses were asked to provide a score between zero and ten, with ten being the most positive response. Scores of nine and ten were banded together as 'promoters' and scores of zero to six as 'detractors'. NPS is calculated as the difference between the percentage of 'promoters' and 'detractors'. A positive NPS means more people would recommend the service than would not.
- **Satisfaction**: how satisfied businesses were with their overall experience of the service or product. Businesses were asked to provide a score from zero to ten, with ten being the most positive response. Scores of seven to ten are banded into 'satisfied', scores of four to six are banded into 'neutral' and scores of zero to three are banded into 'dissatisfied'.

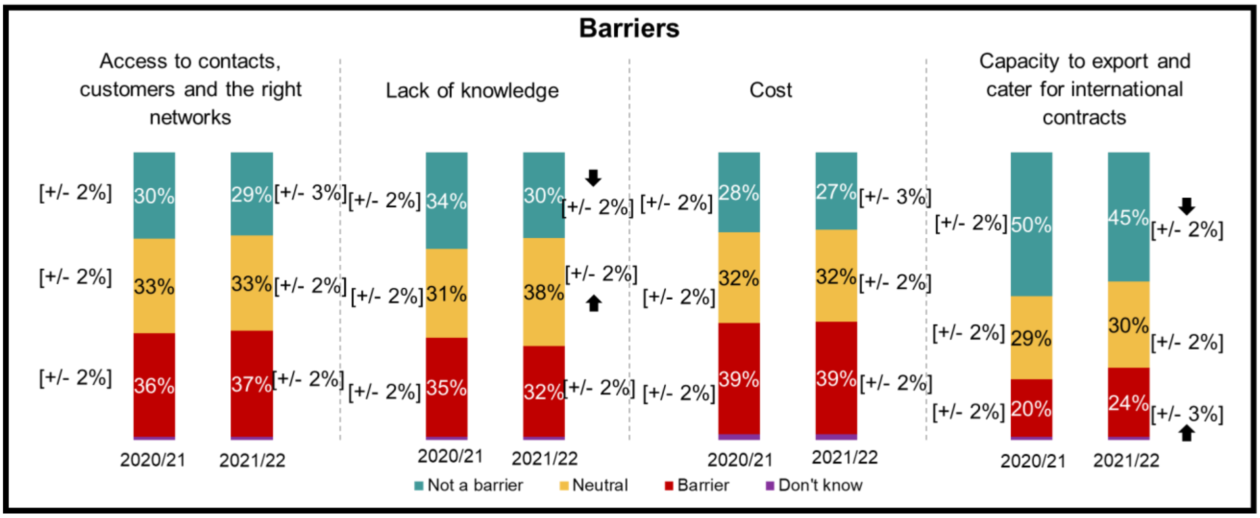
The findings for each DIT service or product are presented alongside the findings from 2020/21. Only changes that are statistically significant are highlighted in the text. Charts and tables represent a statistically significant increase from 2020/21 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

Questions with a base size of fewer than 100 individuals have not been included in this report.

Summary: International Trade Advisers (ITAs)







3.1. International Trade Advisers (ITAs)

International Trade Advisers (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.

This chapter explores satisfaction with the ITA service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 1,479 businesses who used an ITA between April 2021 and March 2022.

Key changes since 2020/21:

The NPS for ITAs was +48, which was a rise compared to +41 in the previous year. This rise was driven by regional increases in the NPS in the North West, South East, and London. The NPS has risen by +11 from 2019/20, demonstrating a two-year upwards trend in the likelihood that respondents will recommend the use of ITAs as a service. Satisfaction with ITAs remained consistent with the previous year (83% compared to 80% in 2020/21), and the likelihood that businesses would *not* recommend the service decreased (14% compared to 18% in 2020/21). Although overall satisfaction with the ITA service was consistent year on year, businesses in the North West were significantly more satisfied with the service than they were in 2020/21 (87% in 2021/22 compared to 77% in 2020/21).

Compared to the previous year, respondents were significantly more positive about the clarity of the steps they needed to take when using the service and after the service (both up 4% from the previous year). As a result of using this service, more businesses said they had secured finance or funding (24% compared to 14% in 2020/21). Respondents were also more likely to agree that using ITAs helped them to build overseas contacts or networks (39% compared to 34% in 2020/21) or understand how to assess their capacity or readiness to export (43% compared to 38%).

However, more businesses were likely to report their capacity to export and cater for international contracts was a barrier to exporting this year (24% compared to 20% in 2020/21). Fewer businesses had researched the paperwork and regulations needed to export as a result of using ITAs (49% compared to 55% in 2020/21).

The population of businesses supported by ITAs was largely consistent with the previous year. However, fewer businesses had never exported before (10% compared to 13% in 2020/21), and fewer non-exporting businesses had plans to start selling overseas in the next 12 months (62% compared to 72% in 2020/21).

3.1.1. Satisfaction with the ITA service

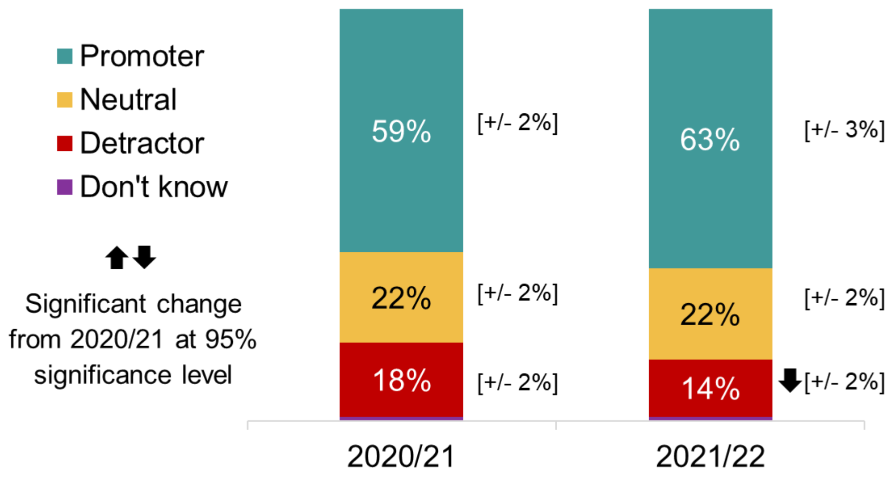
3.1.1.1 Service performance

Businesses were positive about the ITA service and were likely to recommend it to colleagues and business associates. Over six in ten respondents (63%) were ‘Promoters’, i.e. likely to recommend the service, and one in seven (14%) were ‘Detractors’, i.e. unlikely to recommend the service[7]. Comparison with findings from the previous year showed that the proportion of respondents who were *unlikely* to recommend the service decreased (14% compared to 18% in 2020/21) while the likelihood of recommending the ITA service stayed consistent this year (63% compared to 59% in 2020/21). The findings might be explained by increases in the proportion of businesses that were

[7] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

positive about the clarity of the steps that businesses needed to take when using the service (81% compared to 77% in 2020/21) and after the service (75% compared to 71% in 2020/21).

Chart 3.1.1 Likelihood of recommending service (NPS) – ITAs



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used ITAs (n=1,479).

The likelihood of recommending this service varied by region. Businesses in the North West, South West and London (all with an NPS of +56) were most likely to promote the service, followed by those in the East (NPS of +52). Businesses in the North West, South East and London all had an increased NPS when compared to the previous year. This is shown in Table 3.1.1 below.

Table 3.1.1 Net Promoter Score for service by ITA region

	2020/21			2021/22			
	NPS	**CI (+/-)**	**Base**	**NPS**	**CI (+/-)**	**Base**	**Change**
Overall	41	2%	1,526	48	2%	1,479	↑
North West	39	11%	212	56	5%	219	↑
South West	54	17%	73*	56	6%	153	-
London	34	16%	139	56	7%	66*	↑
North East	53	19%	65*	49	9%	77*	-
South East	38	12%	234	48	6%	189	↑
East England	42	12%	209	42	5%	221	-
West Midlands	39	10%	300	40	5%	280	-
Yorkshire	48	12%	182	40	7%	179	-
East Midlands	37	17%	112	40	9%	123	-

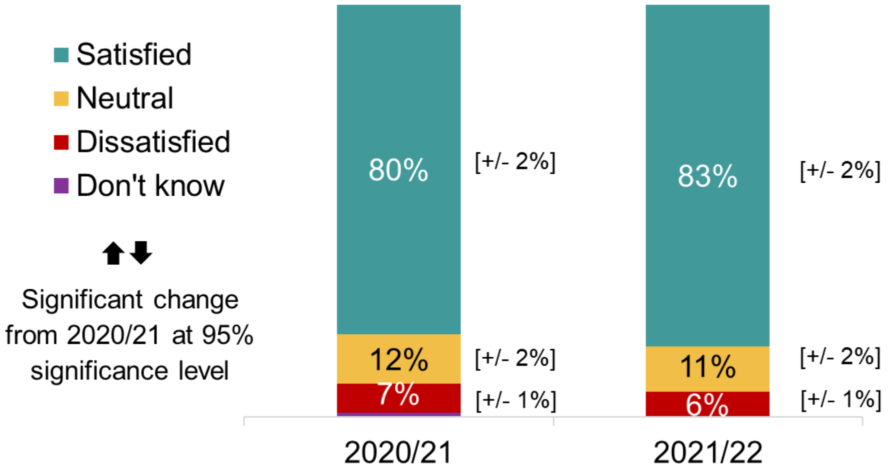
*Small base size – interpret with caution
↑↓ Significant change from 2020/21 at 95% significance level

When asked about **suggestions to improve the service**, three in ten respondents said that better support (29%) would improve the ITA service, while nearly a quarter mentioned communication in some capacity (23%). Specifically, the most frequently suggested improvement for the service was introducing more sector or industry specific services (17%), followed by more communication or information (14%), better quality information (10%), and more knowledgeable staff (10%).

3.1.1.2 Satisfaction

Satisfaction with ITAs stayed consistent with the previous year. Over four in five respondents (83%) said they were satisfied with their experience (compared to 80% in 2020/21), and six percent said they were dissatisfied (in line with 7% in 2019/20)[8].

Chart 3.1.2 Satisfaction with service - ITAs



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used ITAs (excluding 'not applicable' responses) (n=1,465).

Satisfaction also varied by region. Businesses in the South West and North West (87% for both) were most satisfied, followed by businesses in London (86%) and East England (85%). Businesses in the North West were more satisfied with the service than they were in 2020/21 (87% in 2021/22 compared to 77% in 2020/21). This is shown in Table 3.1.2.

[8] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

Table 3.1.2 Satisfaction with service by ITA region

	2020/21			2021/22			
	Satisfied	**CI (+/-)**	**Base**	**Satisfied**	**CI (+/-)**	**Base**	**Change**
Overall	80%	2%	1,509	83%	2%	1,465	-
South West	89%	11%	73*	87%	5%	153	-
North West	77%	7%	212	87%	4%	219	↑
London	80%	8%	139	86%	8%	66	-
East England	80%	7%	209	85%	5%	221	-
North East	84%	11%	65*	84%	8%	77	-
South East	79%	7%	234	83%	5%	189	-
Yorkshire	83%	7%	182	82%	6%	181	-
East Midlands	82%	8%	112	79%	7%	123	-
West Midlands	76%	5%	300	77%	5%	280	-

*Small base size – interpret with caution
↑↓ Significant change from 2020/21 at 95% significance level

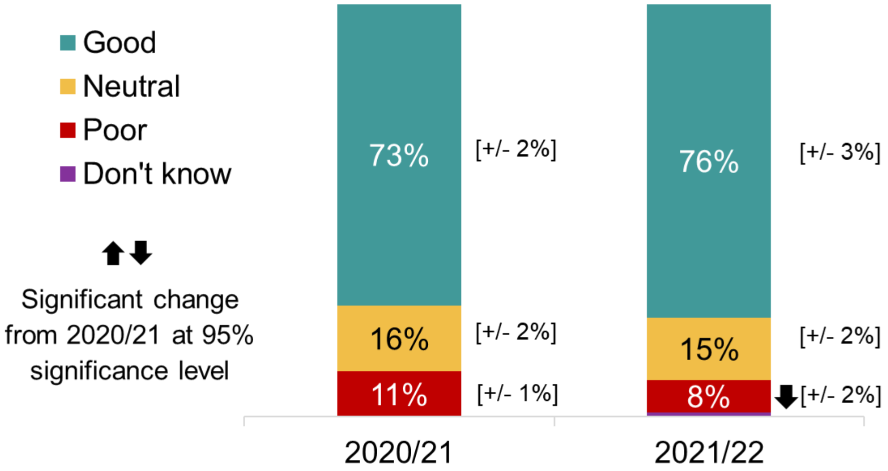
Of the 99 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction**[9] was feeling that the service did not do anything for them or did not help them (53%). A similar proportion of businesses felt that they did not get enough information or advice (45%), and around half as many reported that DIT did not have enough contact with their business (21%). These findings were in line with the previous year.

[9] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.

3.1.1.3 Whether overall service met needs

Businesses were positive that the ITA service had met their needs; over three-quarters (76%) rated it as good, and less than one in ten rated it as poor[10], a lower proportion than in the previous year (8% compared to 11% in 2020/21).

Chart 3.1.3 Rating of whether overall service met needs – ITAs



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used an ITA (excluding 'not applicable' responses) (n=1,446).

Businesses were most positive about staff knowledge (88%), the straightforwardness of the registration process (88%), and the organisation of the service (88%). This was followed by the amount of time taken to receive information (86%) and how comprehensive the information they received was (82%). They were least positive about how clear the steps were that they needed to take after using the service (75%)[11], although this was an improvement from the previous year (up from 71% in 2020/21). Compared to the previous year, businesses were also more positive about how clear they were on the steps they needed to take when using the service (81% compared to 77% in 2020/21).

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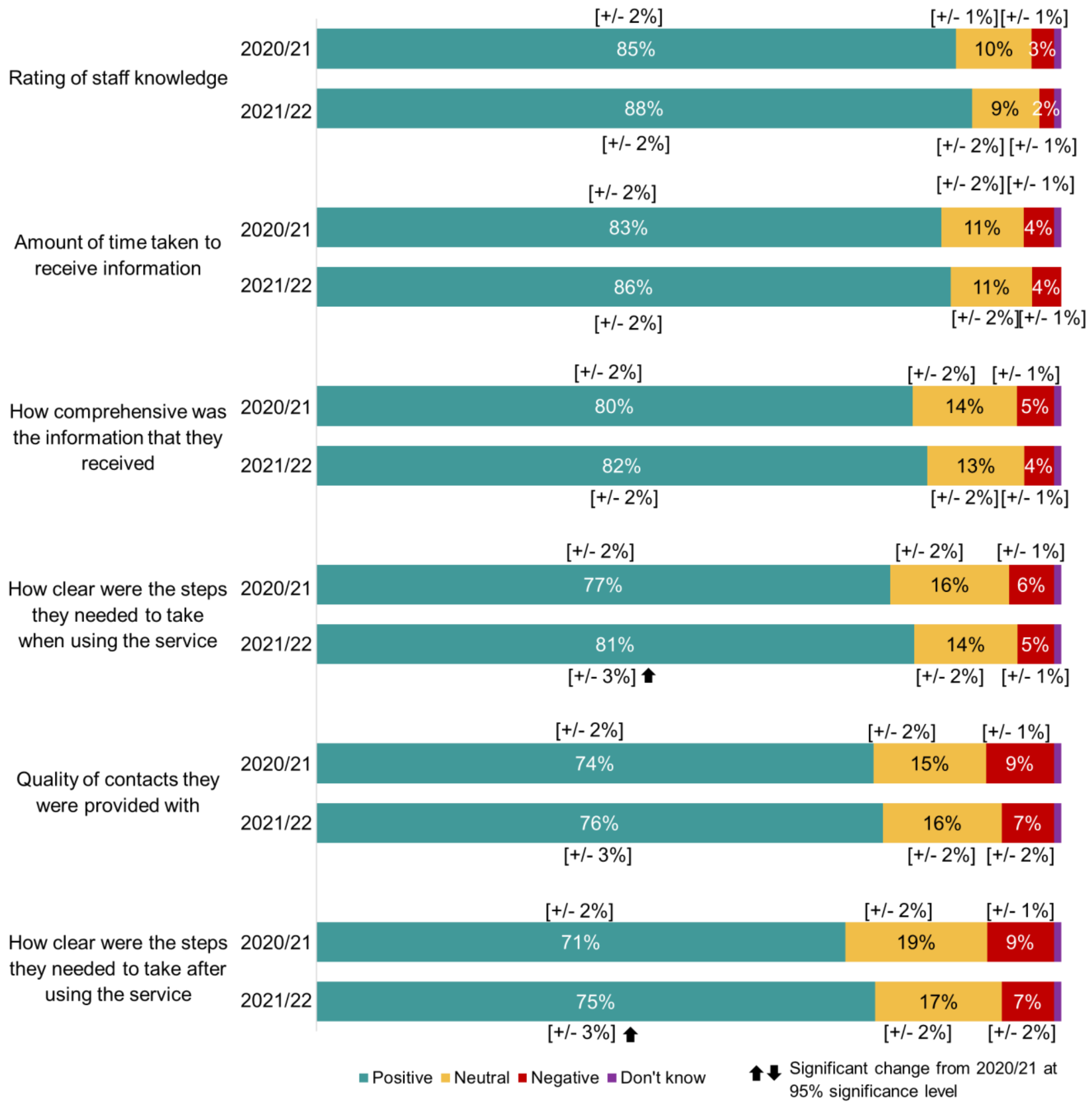
[10] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.
[11] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

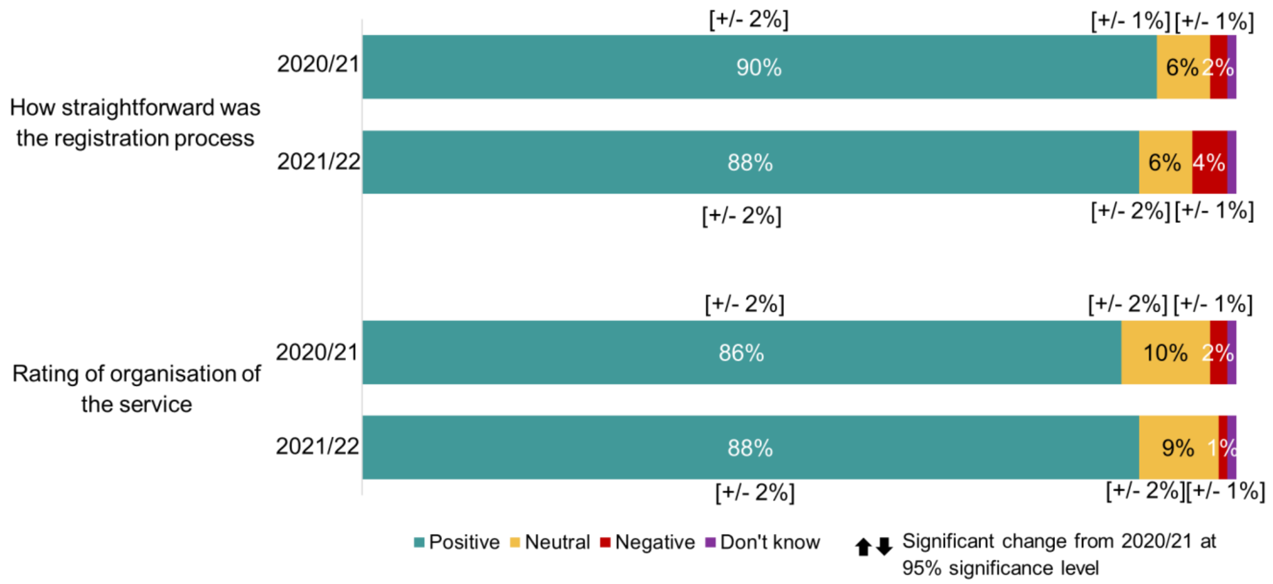
Chart 3.1.4 Rating by business of the specific advice and support they received – ITAs



Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=1,372). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=1,426). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=1,420). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=1,427). Qclarity_2 – The service made clear what I should do next after using it (n=1,409). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=1,177). Base: All respondents that used each service (excluding 'not applicable' responses).

Businesses that attended events organised or facilitated by the ITA service were positive about how straightforward the ITA registration process was and the organisation of the service (both 88%). This was in line with the previous year.

Chart 3.1.5 Rating by business of the registration process and organisation of events organised or facilitated by the service – ITAs



Qreg – How straightforward was the registration process for the service? Base: All respondents that used the service (excluding non-applicable responses) (n=995).
Qevent – How would you rate the organisation of the service? Base: All firms that dealt with Events, Missions or Tradeshows (excluding non-applicable responses) (n=975).

3.1.2. Outcomes of using the ITA service

3.1.2.1 Counteracting the barriers to exporting

Businesses that used the ITA service reported facing barriers to exporting[12]. Two in five (39%) reported cost as a barrier, in line with the previous year (39% in 2020/21). Respondents were split about whether lack of knowledge is a barrier (32%) or not (30%), but the proportion thinking it is not a barrier was lower than in the previous year (34% in 2020/21). Respondents were more likely to perceive their capacity to export and cater for international contracts as a barrier compared to the previous year (24% compared to 20% in 2020/21).

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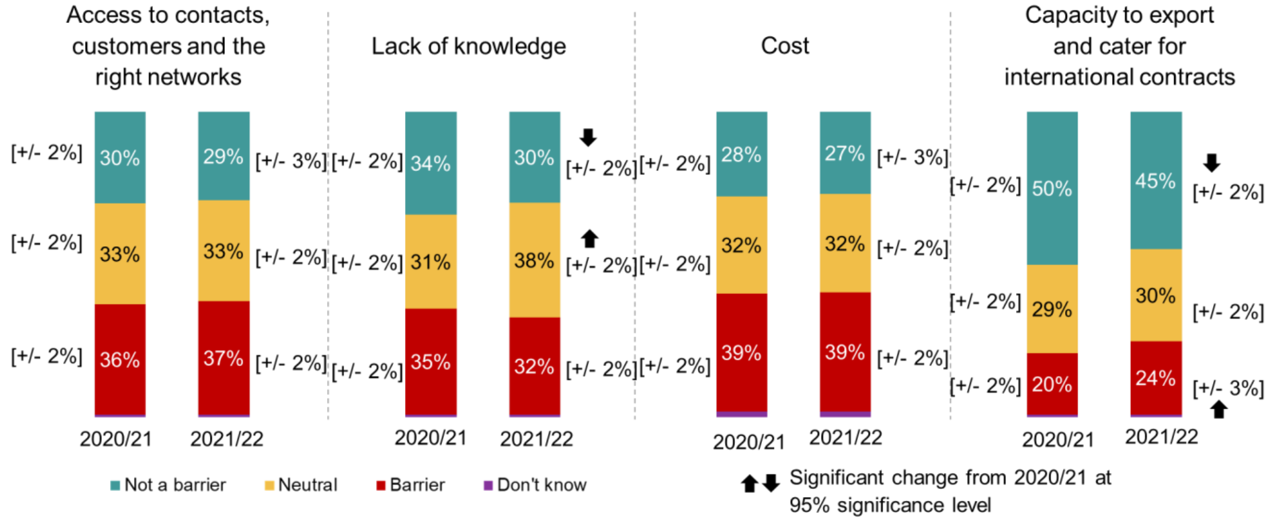
[12] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

Chart 3.1.6 Barriers to exporting – ITAs

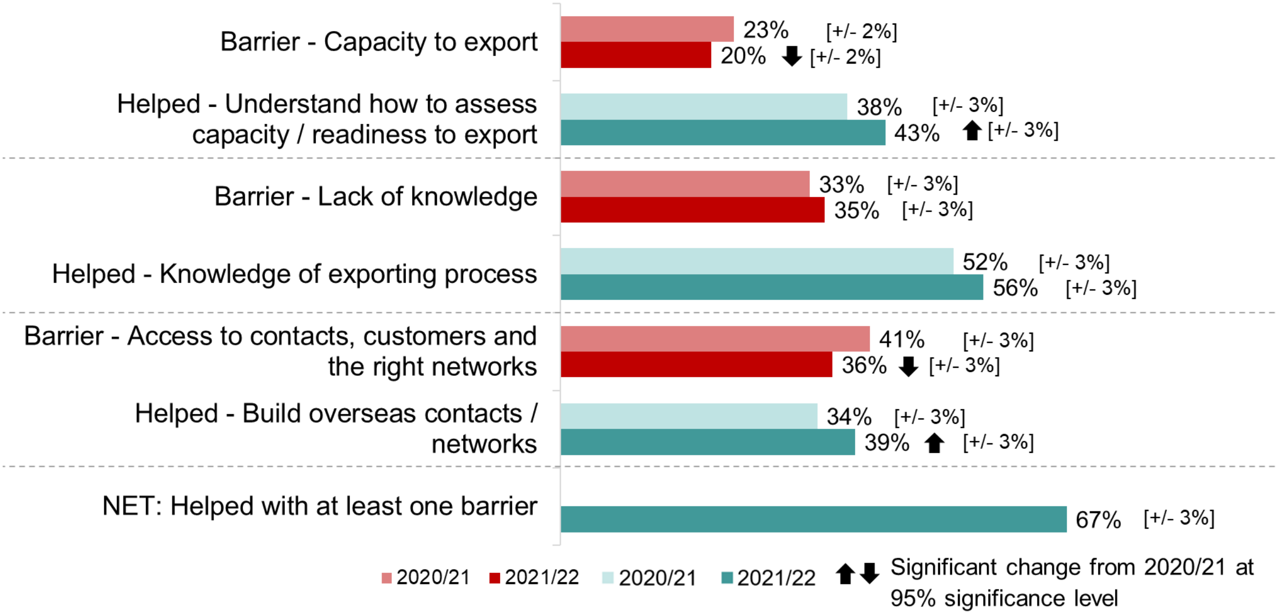


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used ITAs (excluding 'not applicable' responses) (ranging from n=1,443 to n=1,459).

Businesses in the wholesale and retail trade were most likely to consider cost as being a barrier to exporting (50%). Capacity to export was cited as a barrier by more smaller-sized businesses with a turnover of up to £500,000 (29%) than those with a turnover over £500,000 (22%). Lack of access to networks was similarly reported to be more of a barrier for micro firms (41%) than it was for small (32%) and medium businesses (31%).

Businesses were asked whether using ITAs (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using ITAs had helped them understand how to increase their knowledge of the exporting process (56%), assess their capacity and readiness to export (43%, up from 38% in 2020/21), or to build overseas contacts or networks (39%, up from 34% in 2020/21).

Chart 3.1.7 Barriers to exporting and how DIT helped – ITAs



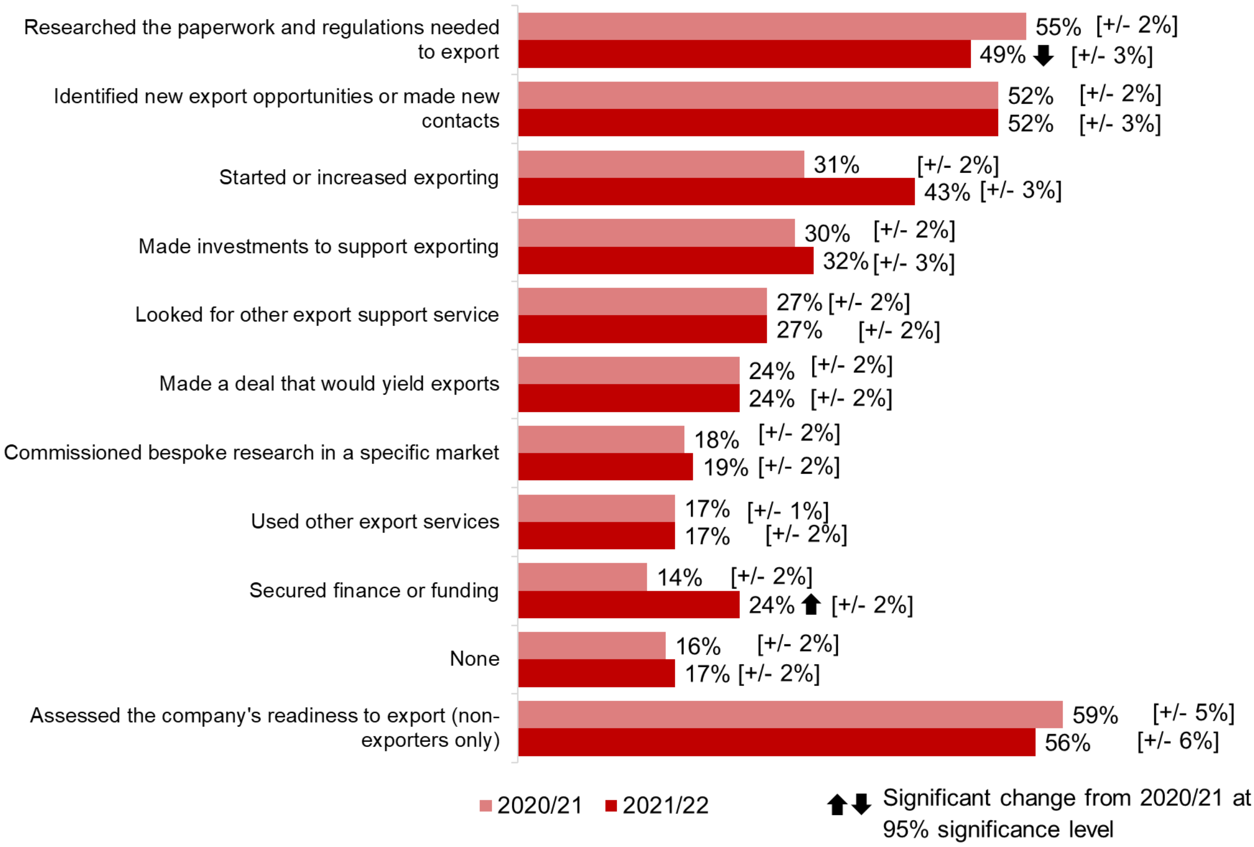
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used ITAs (excluding 'not applicable' responses) (ranging from n=1,443 to n=1,459).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks/ understand how to assess capacity and readiness to export? Base: All respondents who used ITAs (n=1,479).

3.1.2.2 Taking action

Businesses had taken a range of actions as a result of using ITAs. Nearly three in five businesses (56%) that were not exporting at the time of using the service, had assessed the business' readiness to export. Among all businesses, over half said they had identified new export opportunities or made new contacts (52%). Just under half (49%) said they had researched the paperwork and regulations needed to export, although this was less than the proportion from the previous year (55%). Slightly fewer had started or increased exporting (43%) or made investments to support exporting (32%).

Overall, the proportion of businesses saying they had secured finance or funding as a result of using ITAs increased from the previous year, from 14% in 2020/21 to 24% in 2021/22.

Chart 3.1.8 Actions taken as a result of service interaction – ITAs

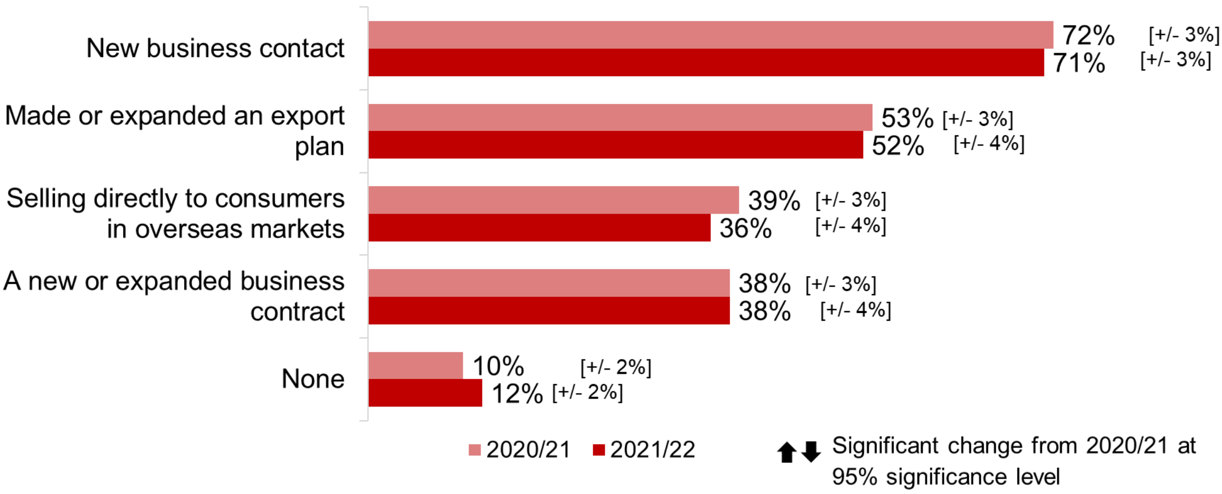


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used ITAs (n=1,479); Non-exporters (n=248).

3.1.2.3 Identifying new opportunities

As a result of using ITAs, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (71%), followed by making or expanding an export plan (52%), making a new or expanded business contract (38%) or selling directly to consumers in overseas markets (36%). These findings were in line with 2020/21.

Chart 3.1.9 Opportunities identified as a result of service interaction – ITAs



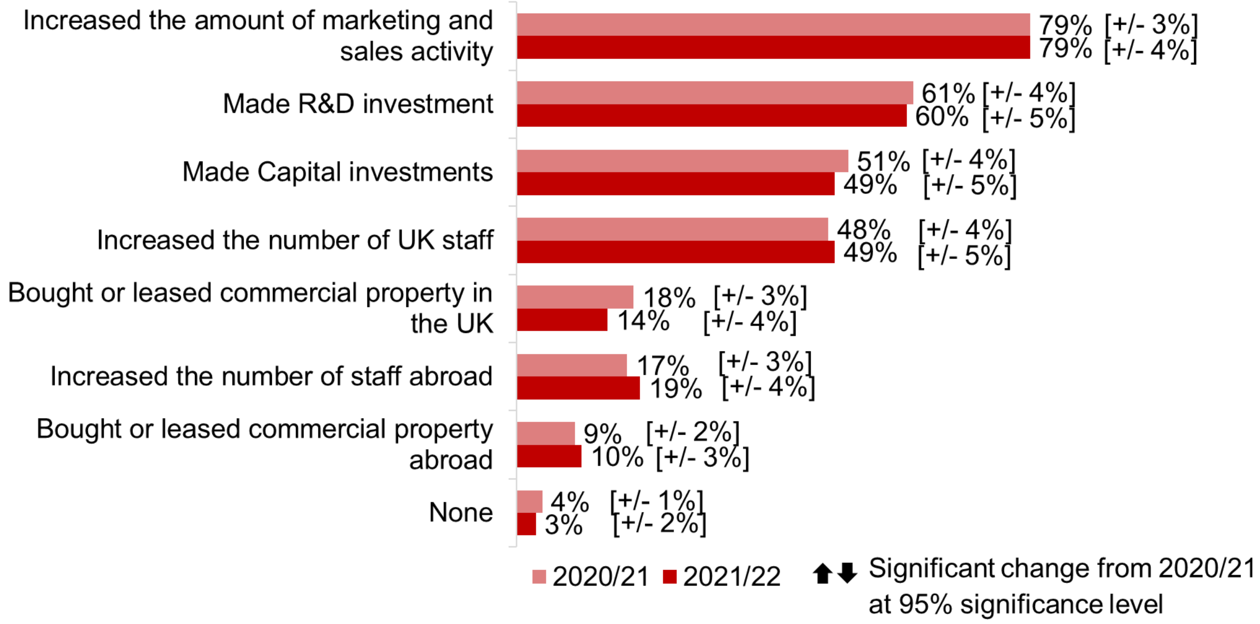
Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used ITAs who had identified a new business contact as part of the DIT service (n=893).

Among businesses that had identified a new business contact as part of the DIT service, half (49%) had made contact with a distributor and a similar proportion had made contact with a buyer (48%).

3.1.2.4 Making investments

Using the ITA service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the ITA service (32% overall), four in five (79%) said they had increased their marketing and sales activity, while three in five made a Research and Development investment (60%) and half made capital investments (49%). These findings remain unchanged compared to the previous year. There were no statistically significant differences detected in the types of investment made by different types of exporter, due to small base sizes.

Chart 3.1.10 Type of investments made as a result of DIT service – ITAs

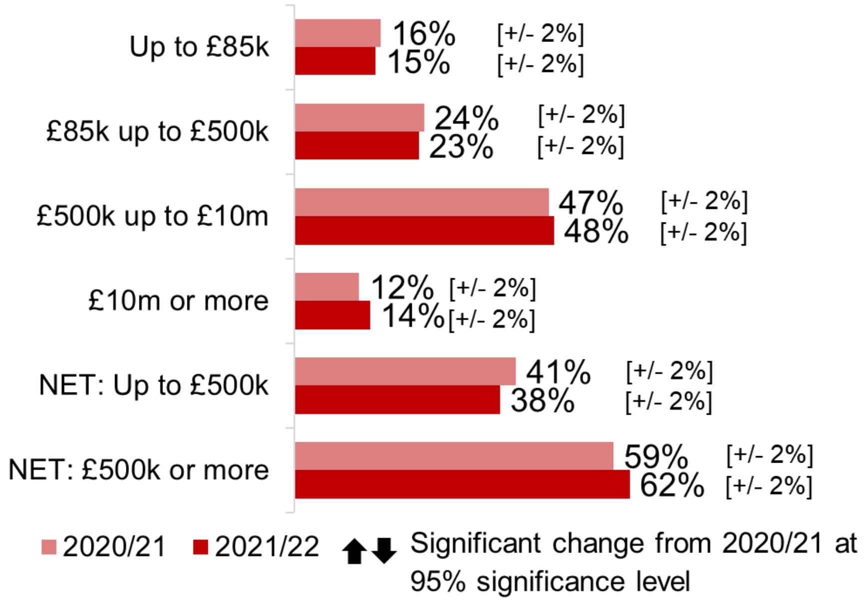


Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Only answers given by more than 3% of respondents are shown. Base: All respondents who had used ITAs and had made investments to support exporting (n=438).

3.1.3. Service use by firmographics and export behaviour

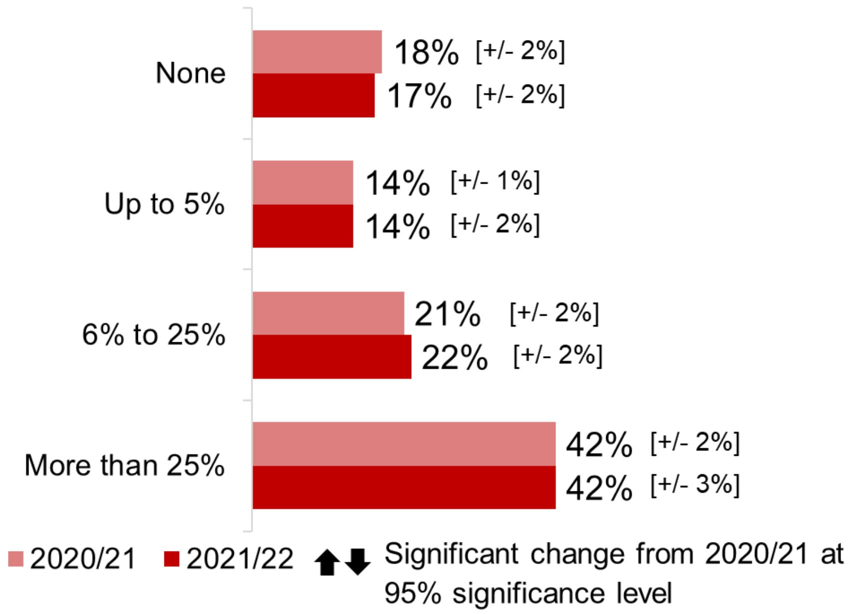
ITA service use was split between businesses with high turnovers of £500,000 or more (62%) and those with lower turnovers (38%), in line with the previous year. Two in five firms (42%) reported that more than a quarter of their turnover came from exporting.

Chart 3.1.11 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used ITAs (excluding Don't know/Refused) (n=1,139).

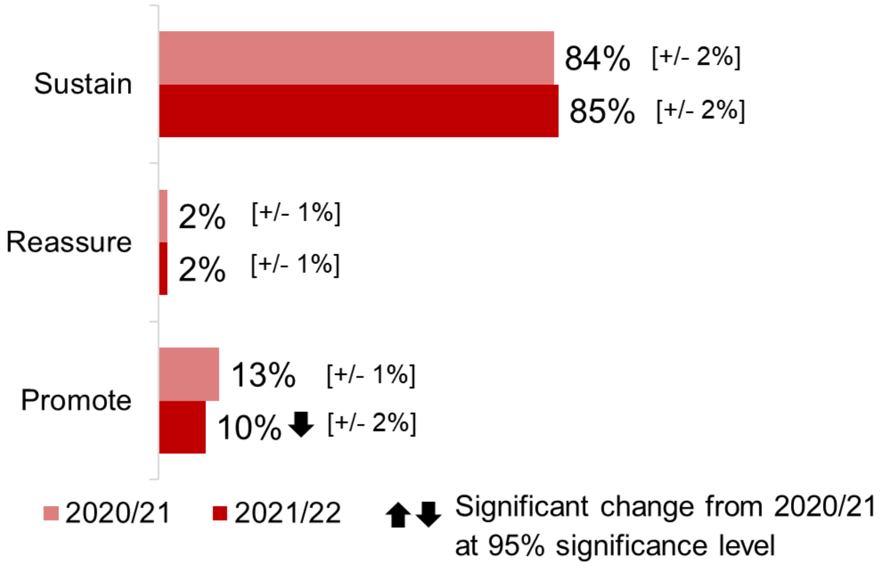
Chart 3.1.12 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used ITAs (n=1,479).

Current exporters made up the majority of businesses using the ITA service. Over four in five businesses (85%) were currently exporting ('Sustain'). Ten percent had never exported before ('Promote'), although this was lower than in the previous year (10% compared to 13% in 2020/21). Only two percent had exported before but not in the past 12 months ('Reassure') [13].

Chart 3.1.13 Exporter status

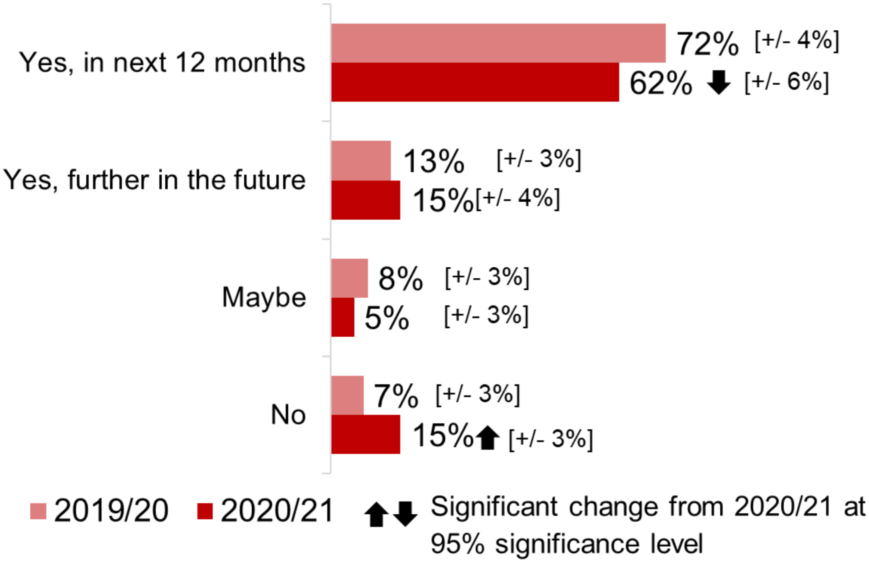


Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used ITAs (n=1,479).

Most former exporters using the ITA service had plans to export again. Six in ten (62%) of those that were not currently exporting (but had done so previously), reported planning to export in the next 12 months. This was lower than in the previous year (72%). However, it was consistent with the results from 2019/20, when 63% of those who were not currently exporting (but had done so previously), reported planning to export in the next 12 months.

[13] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

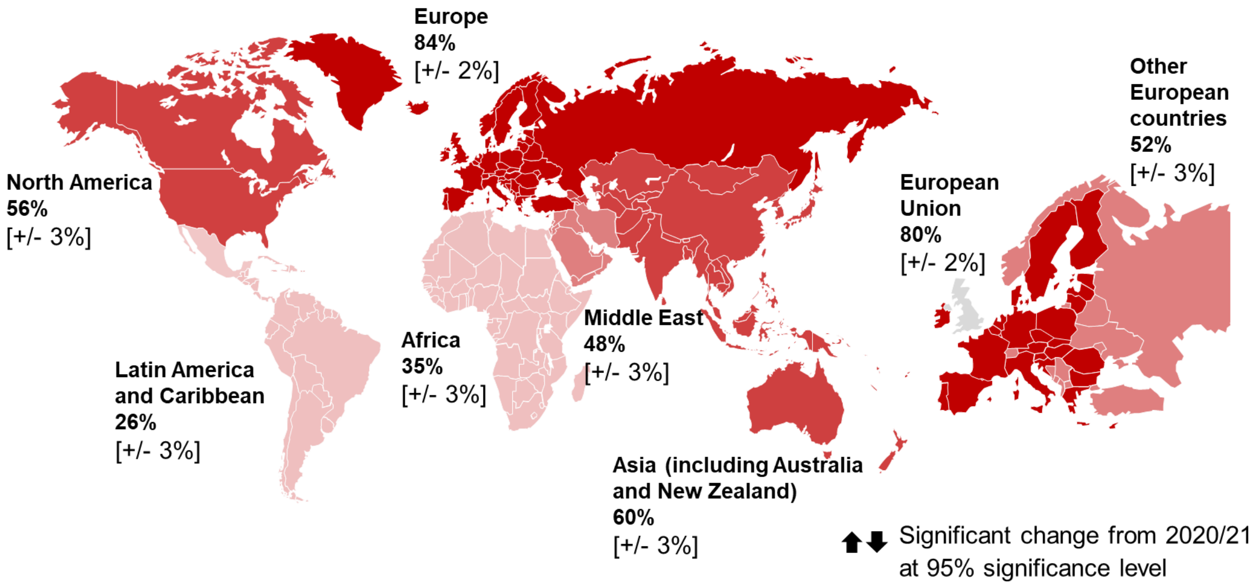
Chart 3.1.14 Non-exporter plans to sell overseas – ITAs



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All respondents who used ITAs and who are not currently exporting but have previously sold goods or services overseas (n=245).

Europe remained the most common export market among ITA businesses, in line with the previous year (84% compared to 85% in 2020/21). Among those that were currently exporting or had done so previously, four in five (80%) exported to the European Union, followed by Asia (60%, the same as the previous year), North America (56%, the same as the previous year) and non-EU European countries (52%, similar to 53% from the previous year). A quarter (26%) of those who were currently exporting (or had done so previously) had exported to Latin America and the Caribbean, making the region the least common export market among ITA businesses.

Chart 3.1.15 Regions organisations export to or exported to previously – ITAs



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used ITAs and who have exported (n=1,288).

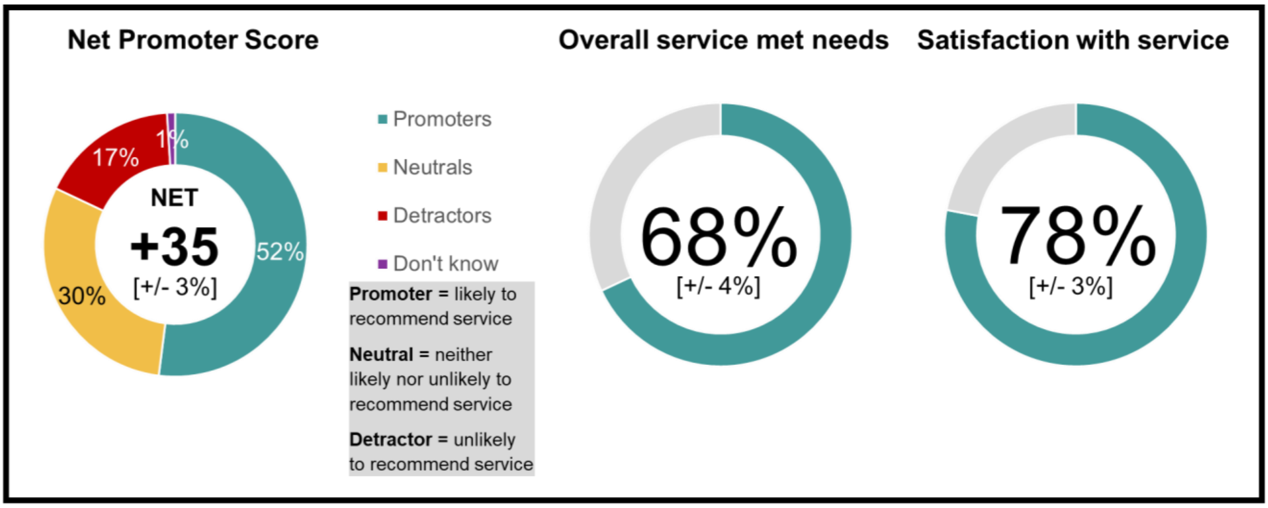
Table 3.1.3 Regions organisations export to or exported to previously – ITAs

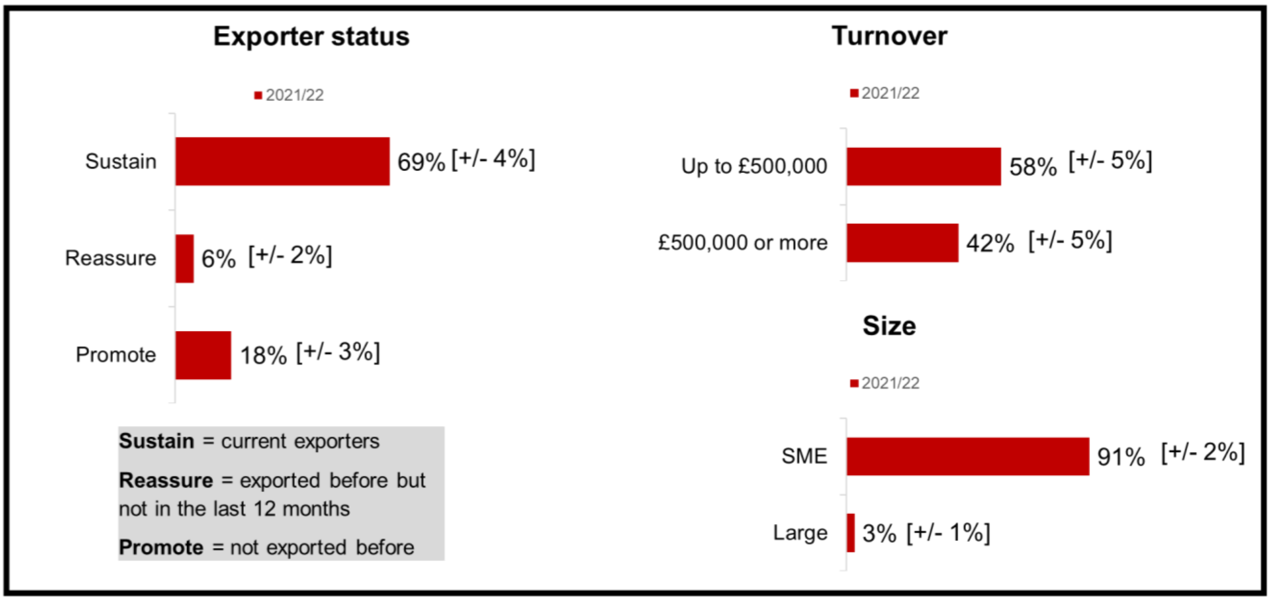
	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	85%	2%	84%	2%	-
European Union	82%	2%	80%	2%	-
Other European countries	53%	3%	52%	3%	-
Asia (including Australia and New Zealand)	60%	3%	60%	3%	-
North America	56%	3%	56%	3%	-
Middle East	49%	3%	48%	3%	-
Africa	34%	3%	35%	3%	-
Latin America and the Caribbean	26%	3%	26%	3%	-

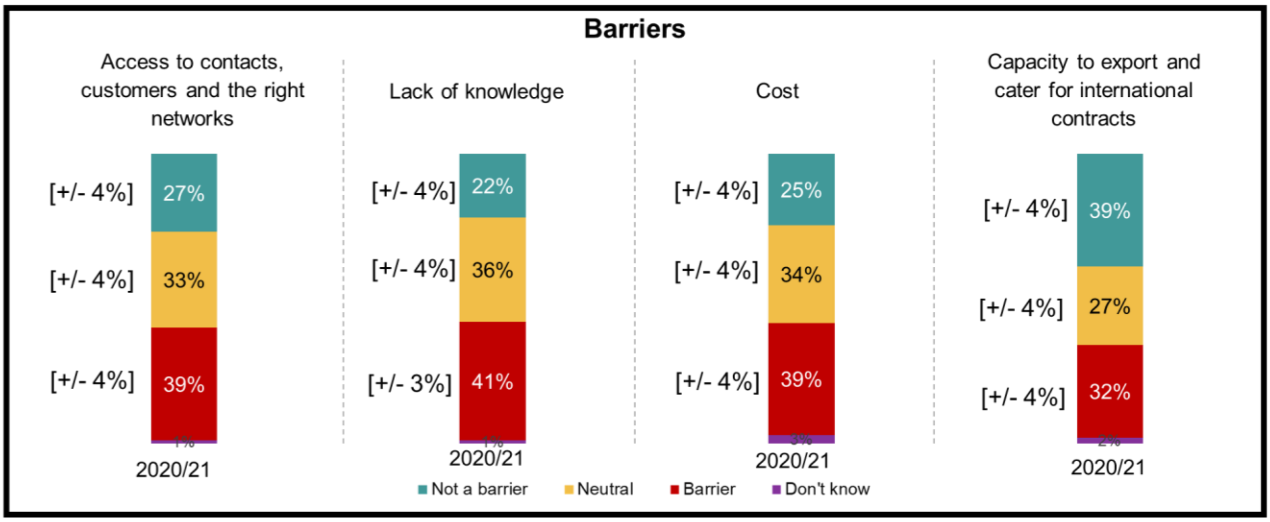
↑↓ Significant change from 2020/21 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used ITAs and who have exported (n=1,288).

Summary: Export Academy







3.2. Export Academy

The Export Academy gives small and medium-sized businesses the know-how to overcome common challenges they face to confidently sell to customers around the world. The programme includes educational events, independent learning, networking and group mentoring. Participants compile an export action plan and can access follow-up support from other DIT services.

This chapter explores satisfaction with the Export Academy service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 654 businesses who used Export Academy between April 2021 and March 2022.

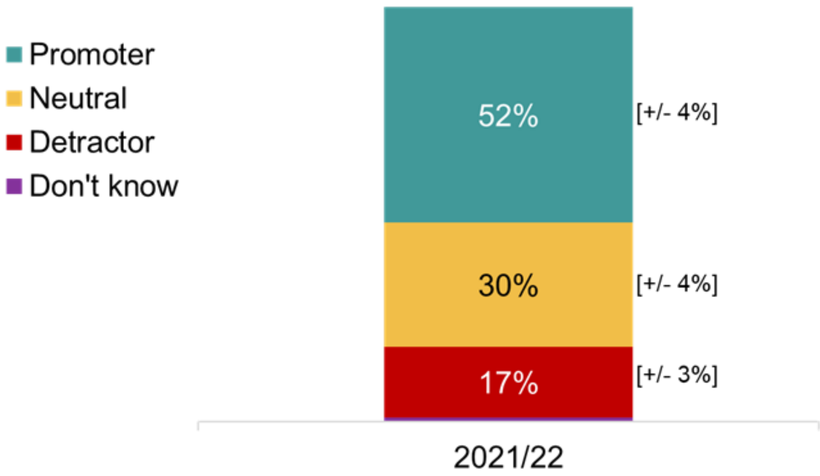
Export Academy was first introduced to the Export Client Survey in April 2021. Therefore, this report does not include any comparisons to findings from the previous year.

3.2.1. Satisfaction with the Export Academy service

3.2.1.1 Service performance

Businesses were mostly positive about the Export Academy service. Over half of respondents (52%) were 'Promoters', i.e. likely to recommend the service, and under a fifth (17%) were 'Detractors', i.e. unlikely to recommend the service[14].

Chart 3.2.1 Likelihood of recommending service (NPS) – Export Academy



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Export Academy (n=654).

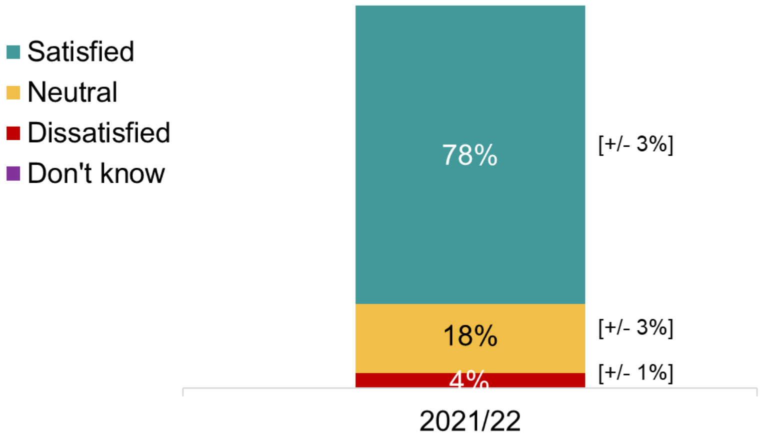
When asked about **suggestions to improve the service**, a third of respondents said mentioned better support (34%), while a quarter mentioned communication in some capacity (26%). Specifically, the most frequently suggested improvements for the service was introducing more sector or industry specific services (15%), followed by more communication or information (14%), better quality information (13%), more knowledgeable staff and increased provision (both 9%).

[14] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

3.2.1.2 Satisfaction

Most Export Academy businesses were largely satisfied with the service. Around three quarters of respondents (78%) said they were satisfied with their experience and four percent said they were dissatisfied[15].

Chart 3.2.2 Satisfaction with service – Export Academy



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Export Academy (excluding 'not applicable' responses) (n=648).

Of the 17 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction[16]** was feeling that the service did not give enough information or advice (75%). A smaller proportion of businesses felt that the service did not do anything/did not help (43%), and a third of businesses reported that DIT advice was more relevant to different types of businesses (36%).

3.2.1.3 Whether overall service met needs

Businesses were positive that the Export Academy service had met their needs; around two thirds (68%) rated it as good, and one in ten rated it as poor (9%)[17].

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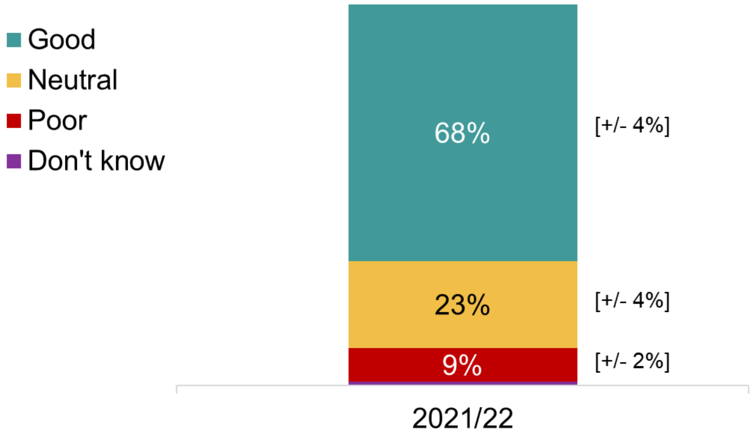
[15] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.
[16] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.
[17] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.

Chart 3.2.3 Rating of whether overall service met needs – Export Academy

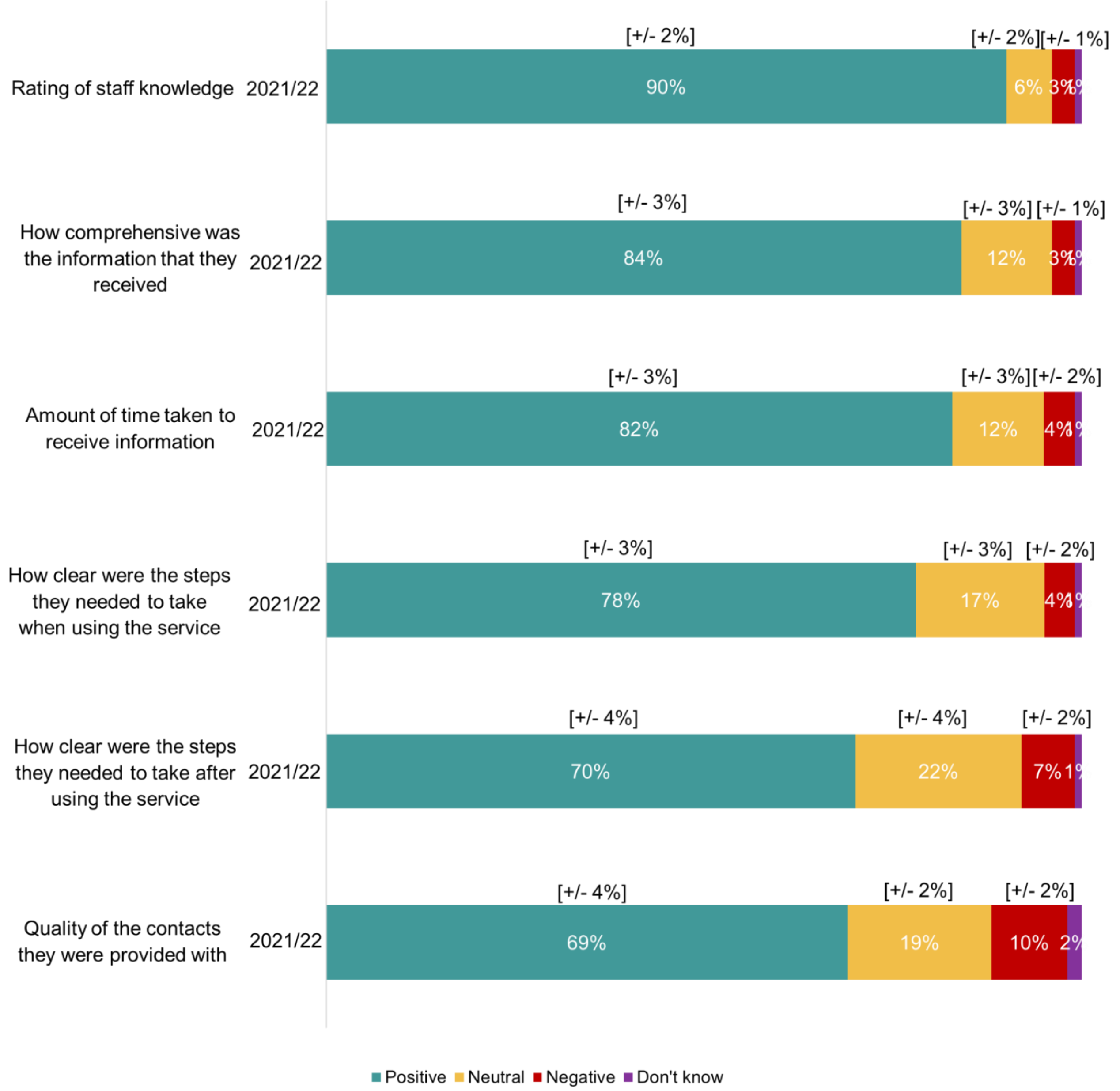


Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used the Export Academy service (excluding 'not applicable' responses) (n=634).

Businesses were most positive about staff knowledge (90%), the straightforwardness of the registration process (85%), and the comprehensiveness of the information that they received (84%). This was followed by the amount of time taken to receive information (82%) and the clarity of the steps they needed to take when using the service (78%). They were least positive about the quality of the contacts they were provided with (69%)[18].

[18] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

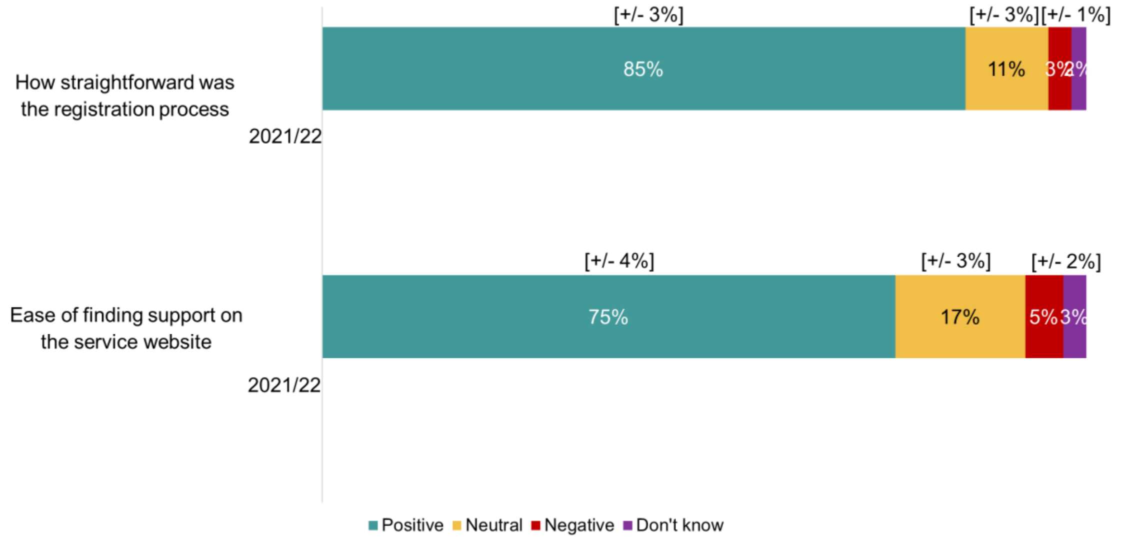
Chart 3.2.4 Rating by business of the specific advice and support they received – Export Academy



Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=620). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=591). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=634). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=636). Qclarity_2 – The service made clear what I should do next after using it (n=624). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=438). Base: All respondents that used each service (excluding 'not applicable' responses).

Respondents were positive about how straightforward the registration process was (85%) and about the ease of finding support on the service website (75%).

Chart 3.2.5 Rating by business of the specific advice and support they received – Export Academy



Qreg – How straightforward was the registration process for the service? Base: All respondents that used the service (excluding non-applicable responses) (n=621).
Qfindinfo – How easy was it to find support on the service website? Base: All firms that dealt with Digital Services (excluding non-applicable responses) (n=575).

3.2.2. Outcomes of using the Export Academy service

3.2.2.1 Counteracting the barriers to exporting

Businesses that used the Export Academy service reported facing barriers to exporting[19]. Four in ten (41%) reported a lack of knowledge as a barrier. A similar proportion reported cost, their capacity to export and cater for international contracts, or access to contacts, customers and the right networks as a barrier (39% each).

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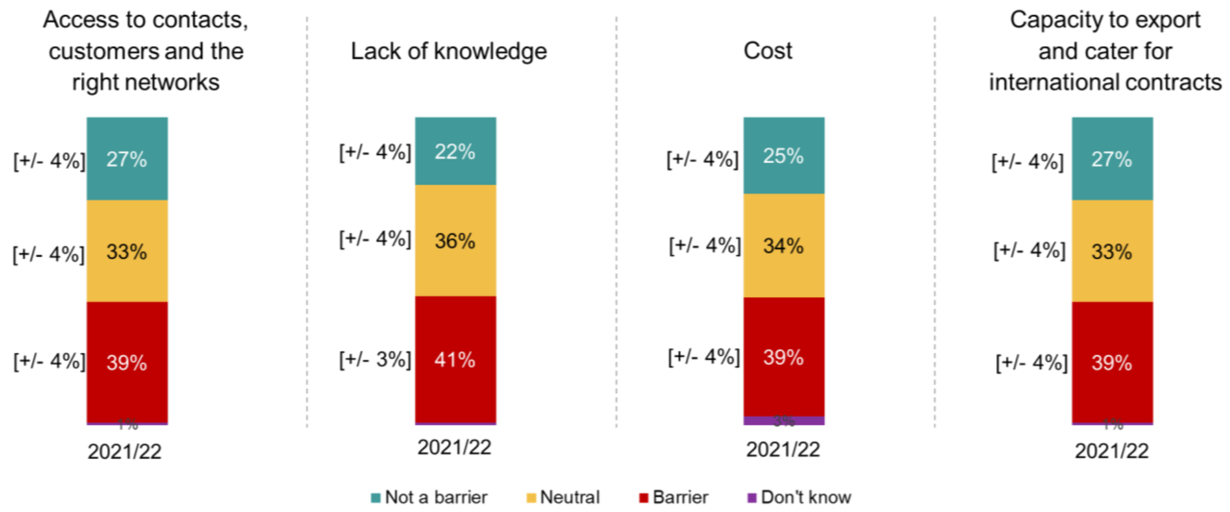
[19] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

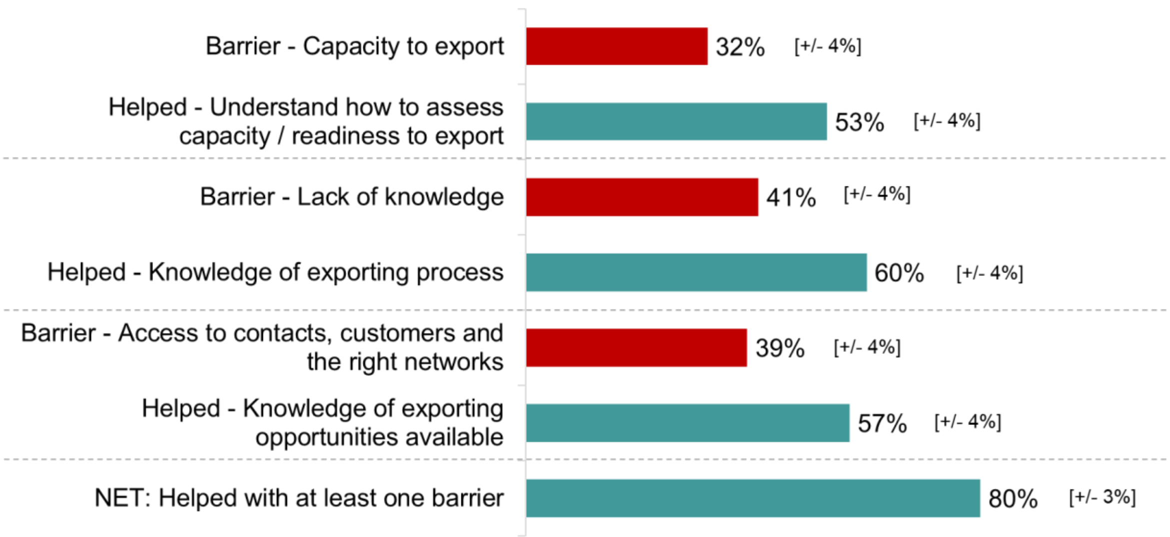
Chart 3.2.6 Barriers to exporting – Export Academy



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 the Export Academy service (excluding 'not applicable' responses) (ranging from n=634 to n=644).

Businesses were asked whether using Export Academy (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Overall, most businesses reported that using the Export Academy service had helped them understand how to increase their knowledge of the exporting process (60%) their knowledge of the exporting opportunities available (57%), or to understand how to assess their capacity and readiness to export (53%).

Chart 3.2.7 Barriers to exporting and how DIT helped – Export Academy

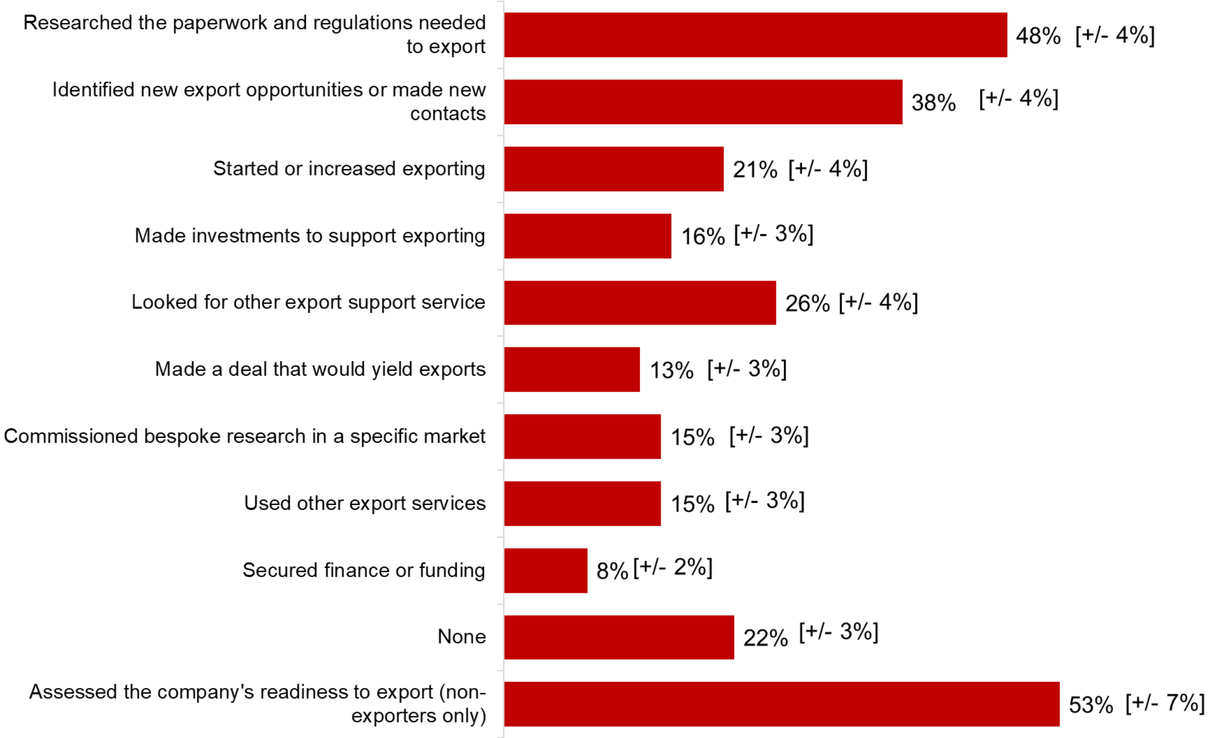


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used the Export Academy service (excluding 'not applicable' responses) (ranging from n=634 to n=644).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks/ understand how to assess capacity and readiness to export? Base: All respondents that used the Export Academy service (n=654).

3.2.2.2 Taking action

Businesses had taken a range of actions as a result of using Export Academy. Over half of businesses (53%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all businesses, nearly half said they had researched the paperwork and regulations needed to export (48%), and around four in ten had identified new export opportunities or made new contacts (38%). Fewer than one in ten businesses (8%) said they had secured finance or funding as a result of using Export Academy.

Chart 3.2.8 Actions taken as a result of service interaction – Export Academy

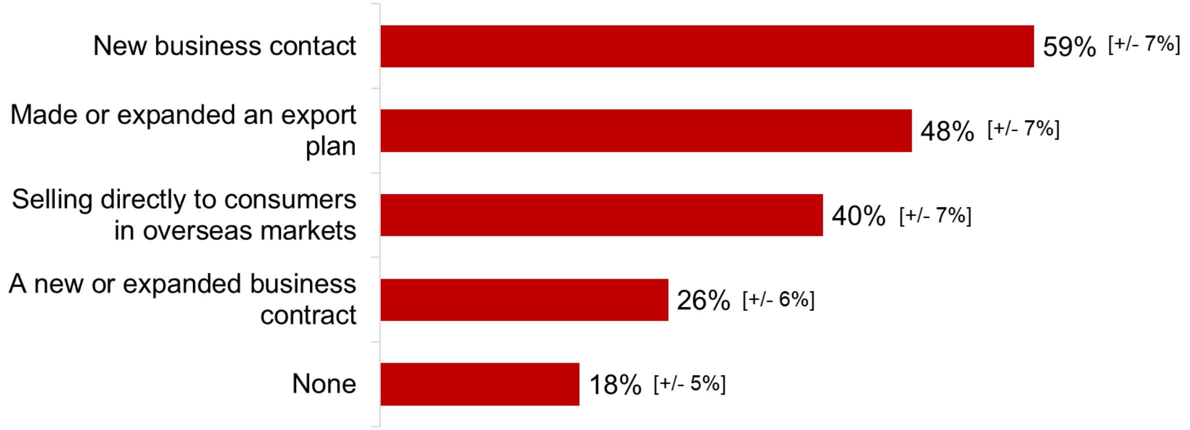


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents that used the Export Academy service (n=654); Non-exporters (n=151).

3.2.2.3 Identifying new opportunities

As a result of using Export Academy, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (59%), followed by making or expanding an export plan (48%) or selling directly to consumers in overseas markets (40%). A quarter of Export Academy businesses reported making a new business contract or expanding an existing one (26%). Overall, two in ten (18%) had not identified any opportunities.

Chart 3.2.9 Opportunities identified as a result of service interaction – Export Academy

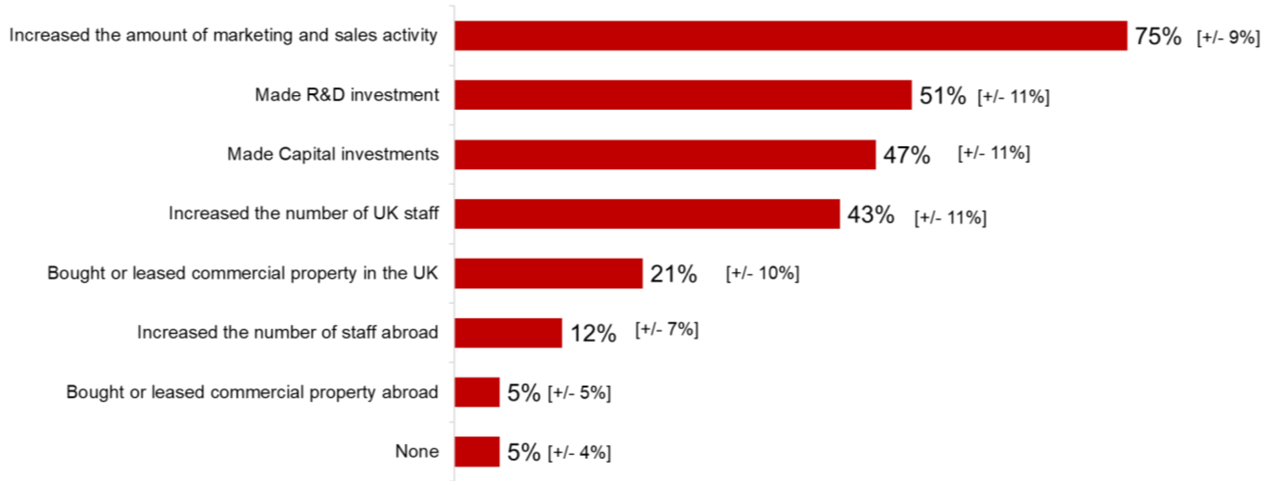


Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used the Export Academy service who had identified a new business contact as part of the DIT service (n=278).

3.2.2.4 Making investments

Using the Export Academy service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the Export Academy service (21% overall), three quarters (75%) said they had increased their marketing and sales activity, while over half made a Research and Development investment (51%) and slightly fewer made capital investments (47%) or increased the number of UK staff (43%).

Chart 3.2.10 Type of investments made as a result of DIT service – Export Academy

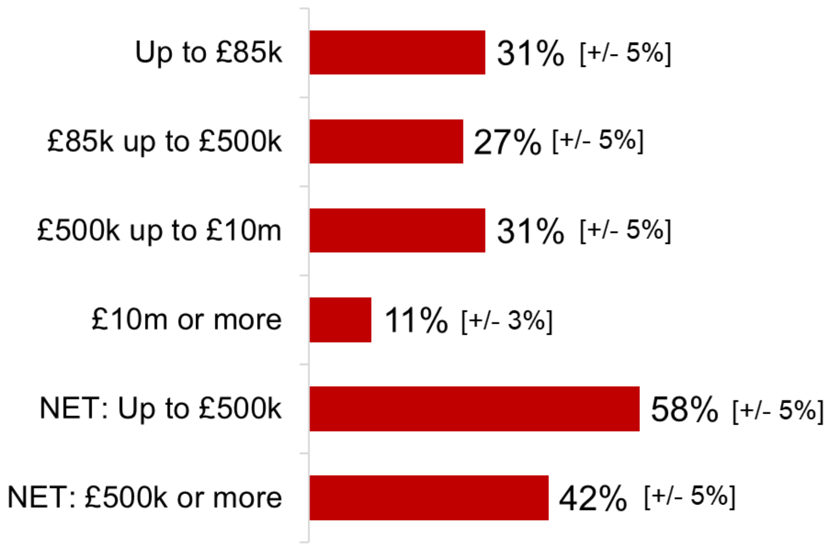


Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Only answers given by more than 3% of respondents are shown. Base: All respondents who had used the Export Academy service and had made investments to support exporting (n=104).

3.2.3. Service use by firmographics and export behaviour

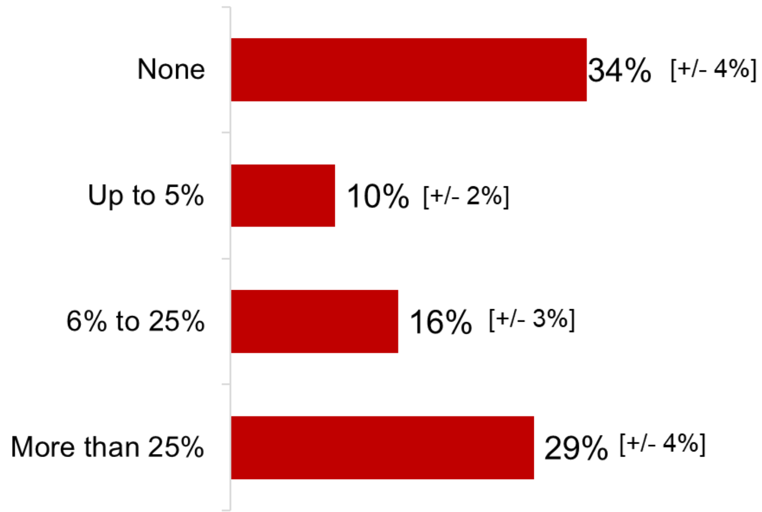
Export Academy use was broadly split between businesses with high turnovers of £500,000 or more (42%) and those with lower turnovers (58%). Three in ten firms (29%) reported that more than a quarter of their turnover came from exporting.

Chart 3.2.11 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used the Export Academy Service (excluding Don't know/Refused) (n=407).

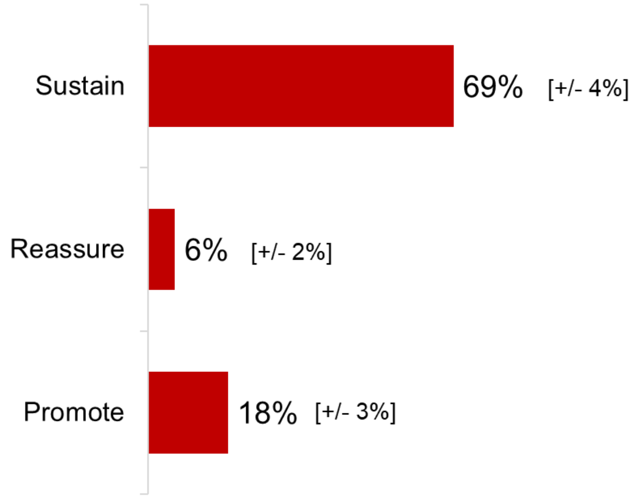
Chart 3.2.12 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used the Export Academy Service (n=654).

Current exporters made up the majority of businesses using the Export Academy service. Seven in ten businesses (69%) were currently exporting ('Sustain'). A fifth of respondents (18%) had never exported before ('Promote'), and six percent had exported before but not in the past 12 months ('Reassure') [20].

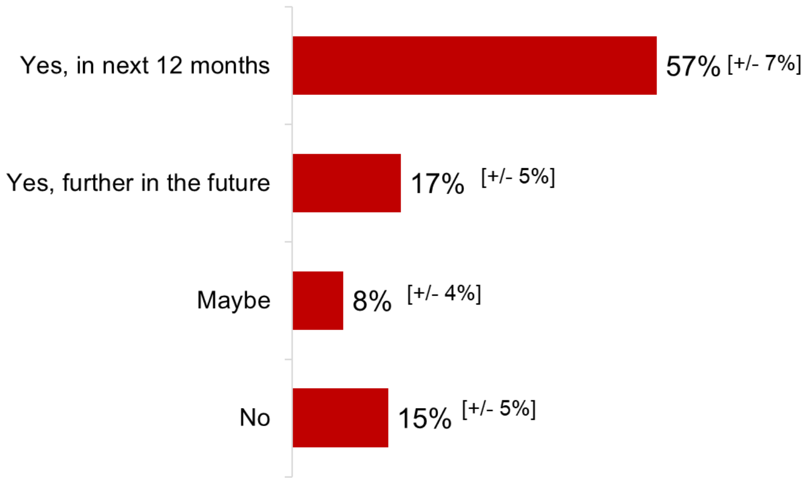
Chart 3.2.13 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used the Export Academy service (n=654).

Most former exporters using Export Academy had plans to export again. Over half (57%) of those that were not currently exporting (but had done so previously), reported planning to export in the next 12 months.

Chart 3.2.14 Non-exporter plans to sell overseas



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All respondents who used the Export Academy service and who are not currently exporting but have previously sold goods or services overseas (n=215).

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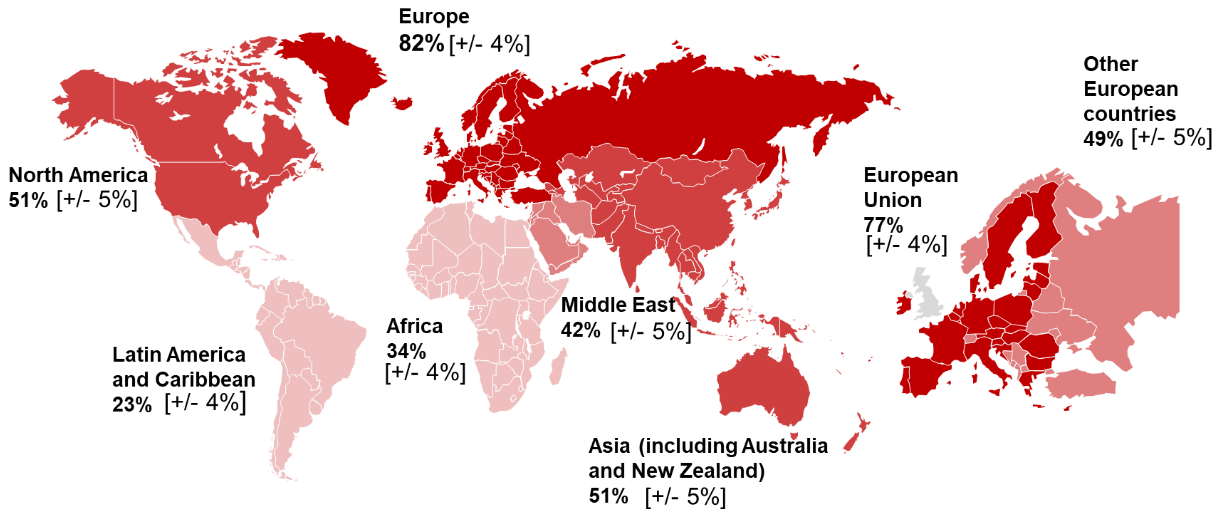
[20] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

Europe was the most common export market among Export Academy businesses, with four in five exporting to the region (82%). Europe as an export market was further divided into the European Union, which over three quarters of Export Academy respondents exported to (77%), and other European countries, which half of Export Academy respondents exported to (49%). This was followed by Asia and North America (both 51%) and the Middle East (42%). Under a quarter (23%) of those who were currently exporting (or had done so previously) had exported to Latin America and the Caribbean, making this region the least common export market among Export Academy businesses.

Chart 3.2.15 Regions organisations export to or exported to previously – Export Academy



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used the Export Academy service and who have exported (n=495).

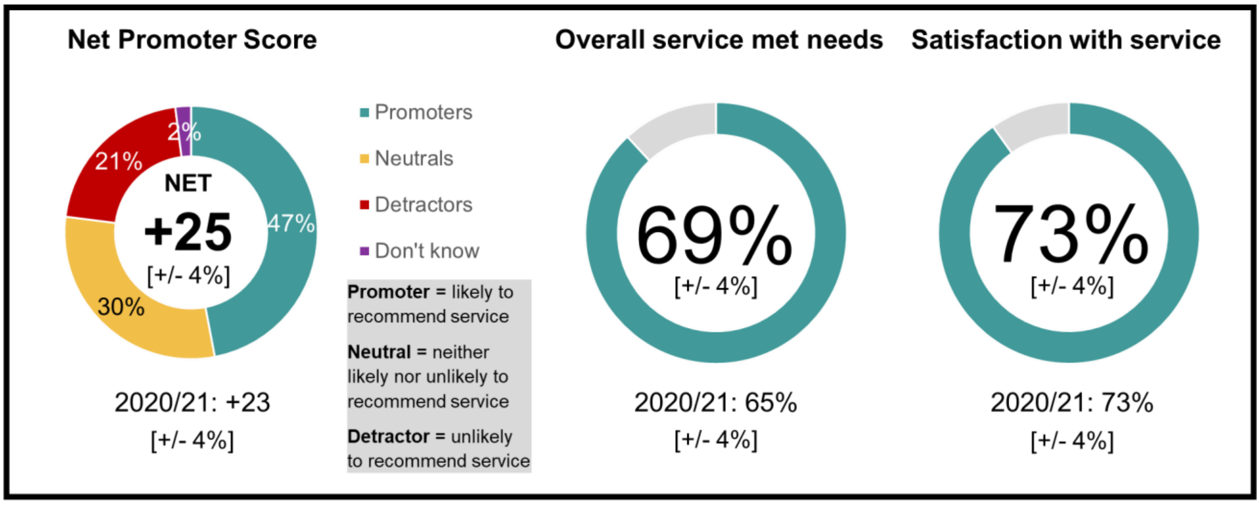
Table 3.2.1 Regions organisations export to or exported to previously – Export Academy

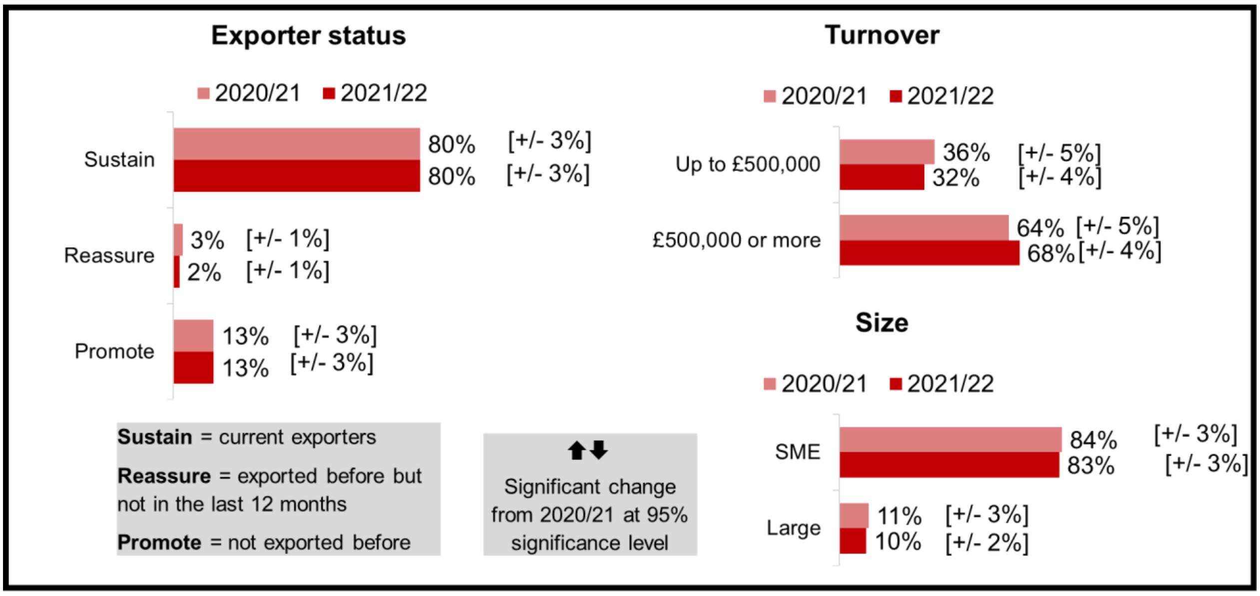
	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	85%	2%	84%	4%	-
European Union	82%	2%	80%	4%	-
Other European countries	53%	3%	52%	5%	-
Asia (including Australia and New Zealand)	60%	3%	60%	5%	-
North America	56%	3%	56%	5%	-
Middle East	49%	3%	48%	5%	-
Africa	34%	3%	35%	4%	-
Latin America and the Caribbean	26%	3%	26%	4%	-

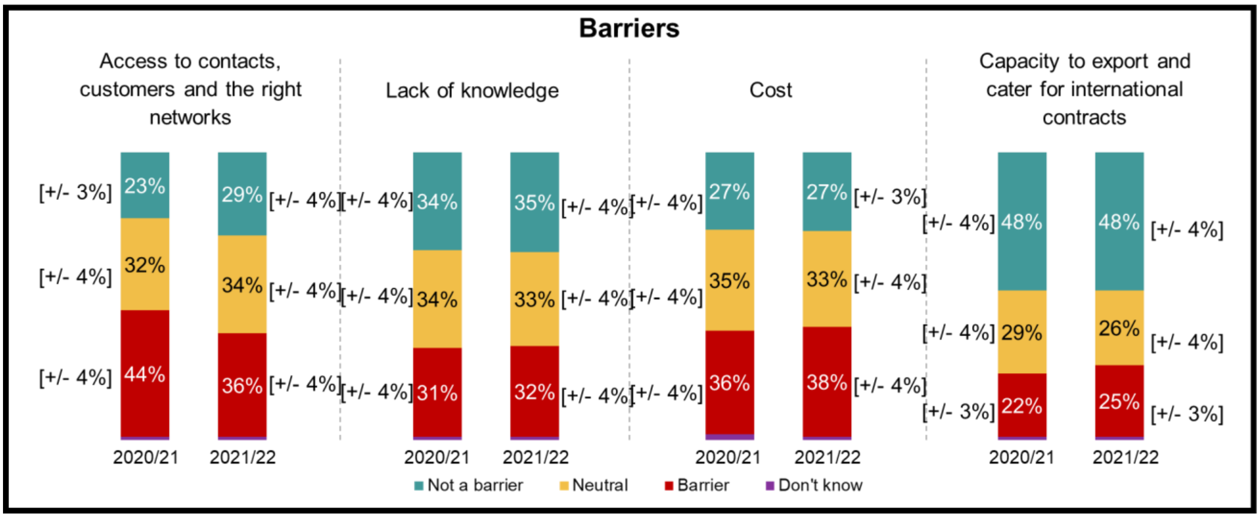
↑↓ Significant change from 2020/21 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used the Export Academy service and who have exported (n=495).

Summary: Posts







3.3. Posts

The Posts Overseas Network is a combination of locally engaged and overseas-posted staff. The 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.

This chapter explores satisfaction with the Posts service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 685 businesses who used Posts between April 2021 and March 2022.

Owing to differences in data entry practices between different Posts, the findings presented in this chapter only cover those overseas Posts that provided data in DIT's client relationship management system, on a consistent and timely basis.

Key changes since 2020/21:

Posts businesses were more likely to have made investments to support new or increased export opportunities. Specifically, businesses were more likely to have increased their marketing and sales activity (89% compared to 76% in 2020/21), increased the number of UK staff (67% compared to 42% in 2020/21) and increased the number of staff abroad (45% compared to 25% in 2020/21).

However, fewer respondents had taken action as a result of using Posts. Specifically, businesses were less likely to say they had identified new export opportunities or made new contacts (58% compared to 67% in 2020/21), researched the paperwork and regulations needed to export (37% compared to 49% in 2020/21), started or increased exporting (21% compared to 30% in 2020/21), made investments to support exporting (24% compared to 30% in 2020/21) or made a deal that would yield exports (19% compared to 27% in 2020/21).

Access to contacts, customers and the right networks was less likely to be perceived as a barrier this year (36% compared to 44% in 2020/21). Most non-exporting respondents had plans to start selling overseas, although there was a shift this year, with more businesses saying they planned to wait more than a year before exporting (22% compared to 12% in 2021/21).

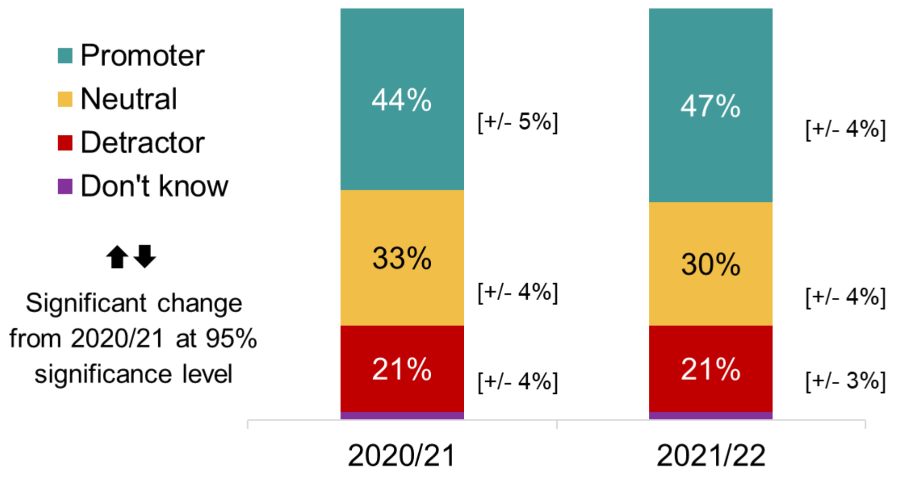
3.3.1. Satisfaction with the Posts service

3.3.1.1 Service performance

Businesses gave a positive response overall as to whether they would recommend the Posts service to colleagues and business associates. Around half of respondents (47%) were 'Promoters', i.e. likely to recommend the service, and one in five (21%) were 'Detractors', i.e. unlikely to recommend the service[21]. These findings were in line with the previous year, as was the Net Promoter Score ('Promoters' minus 'Detractors'), which was +25 this year (compared to +23 in 2020/21).

[21] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

Chart 3.3.1 Likelihood of recommending service (NPS) – Posts



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Posts (n=685).

The likelihood of recommending this service varied by region. Businesses dealing with the Middle East (NPS of +12) were less likely to promote the service than businesses trading with other regions, in particular compared to businesses dealing with Latin America and the Caribbean (NPS of +35) and Europe (NPS of +25). Businesses dealing with Latin America and the Caribbean were more likely to promote the service compared to the previous year (NPS of +35 compared to +17 in 2020/21). This is shown in Table 3.4.1 below.

Table 3.3.1 Net Promoter Score for service by HMTC region

	2020/21			2021/22			
	NPS	**CI (+/-)**	**Base**	**NPS**	**CI (+/-)**	**Base**	**Change**
Overall	23	5%	622	25	4%	685	-
Europe	28	10%	281	25	5%	308	-
Eastern Europe and Central Asia	32	22%	51*	19	12%	71*	-
Middle East	12	19%	105	12	10%	82*	-
Asia Pacific	15	20%	59*	21	10%	65*	-
Latin America and Caribbean	17	22%	74*	35	9%	87*	↑
North America	21	25%	27*	39	14%	41*	-
Africa	47	28%	24*	56	17%	15*	-

*Small base size – interpret with caution
↑↓ Significant change from 2020/21 at 95% significance level

The results also varied by business size, with medium businesses more likely to be ‘Promoters’ of the Post service (61%), compared with micro (43%), small (46%) or large (42%) businesses.

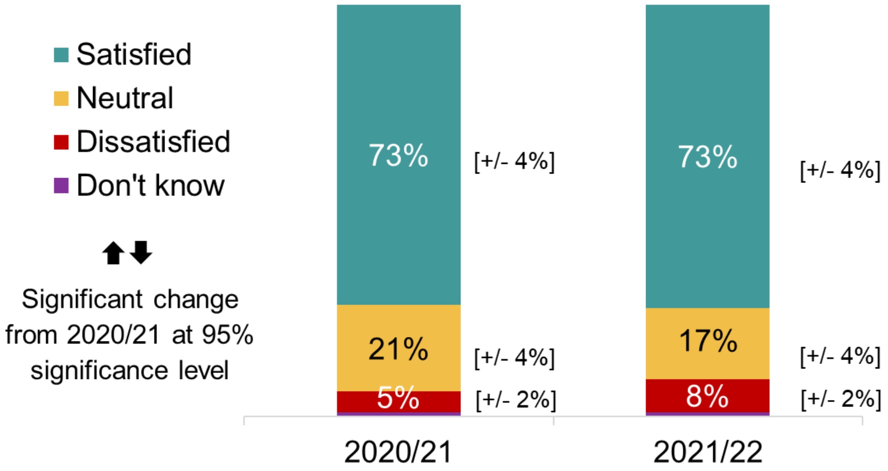
Businesses felt that the service **could be improved** by having better support (33%) or communication (30%). Specifically, the most frequently suggested improvements for the service were more communication or information (17%) and more sector or industry specific services

(17%), followed by better quality information (12%), better follow-up (12%) and more knowledgeable staff (10%).

3.3.1.2 Satisfaction

Satisfaction with Posts remained in line with last year. Almost three-quarters of respondents (73%) said they were satisfied with their experience (identical to the figure in 2020/21), while 8% said they were dissatisfied (5% in 2020/21)[22].

Chart 3.3.2 Satisfaction with service - Posts



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Posts (excluding 'not applicable' responses) (n=665).

Satisfaction was mostly consistent by region, although businesses dealing with the Asia Pacific region were more satisfied than those dealing with the Middle East (84% and 66% respectively). This is shown in Table 3.3.2.

Table 3.3.2 Satisfaction with service by HMTC region

	2020/21			2021/22			
	Satisfied	**CI (+/-)**	**Base**	**Satisfied**	**CI (+/-)**	**Base**	**Change**
Overall	73%	4%	616	73%	4%	665	-
Europe	73%	6%	278	72%	6%	302	-
Eastern Europe and Central Asia	78%	13%	51*	67%	13%	68*	-
Middle East	65%	11%	105	66%	12%	81*	-
Asia Pacific	73%	12%	57*	84%	10%	65*	-
Latin America and Caribbean	70%	12%	74*	80%	9%	84*	-
North America	81%	17%	26*	71%	18%	37*	-
Africa	90%	13%	24*	91%	21%	14*	-

*Small base size – interpret with caution

[22] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

↑↓ Significant change from 2020/21 at 95% significance level

Satisfaction was higher among larger businesses. More than eight in ten large (86%) and medium (82%) businesses were satisfied, compared to seven in ten small and micro firms (70%). Satisfaction was also higher among businesses with a turnover of £500,000 or more (78%) compared to those with a turnover of up to £500,000 (65%).

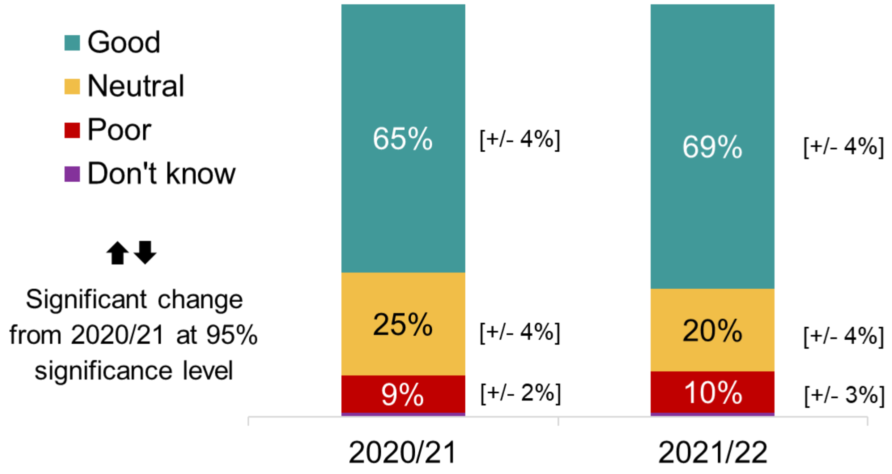
Of the 59 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction**[23] was feeling that the service did not do anything for them or did not help them (64%). More than half of dissatisfied businesses felt that they did not get enough information or advice (55%), while around a third reported poor quality contacts (33%) or said that DIT did not have enough contact with their business (31%). These findings were in line with the previous year.

3.3.1.3 Whether overall service met needs

Businesses were positive that the Posts service had met their needs; seven in ten (69%) rated it as good, and one in ten (10%) rated it as poor[24]. These findings were in line with the previous year.

Businesses with a lower turnover were more negative. One in five of those with a turnover of up to £500,000 (19%) rated the service as poor, compared with eight percent of those with a turnover £500,000 or more.

Chart 3.3.3 Rating of whether overall service met needs – Posts



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Posts (excluding 'not applicable' responses) (n=661).

Businesses were most positive about staff knowledge (85%). This was followed by the amount of time taken to receive information (75%) and how comprehensive the information they received was (73%). They were less positive about how clear the steps were that they needed to take when using the service (68%), the quality of contacts they were provided with (67%) and how clear the steps were after using the service (64%)[25].

These findings were in line with the previous year.

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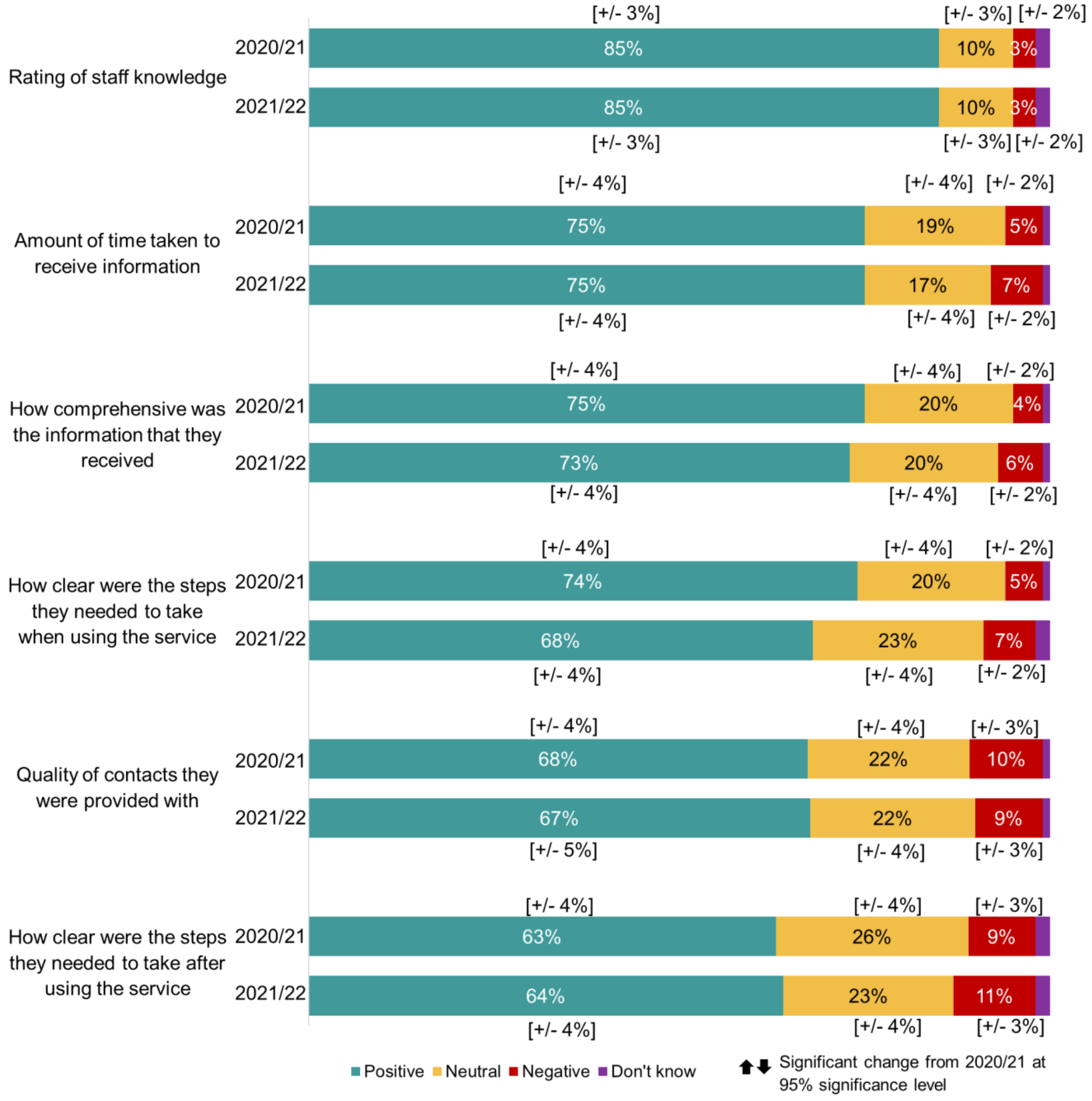
[23] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.
[24] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.
[25] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

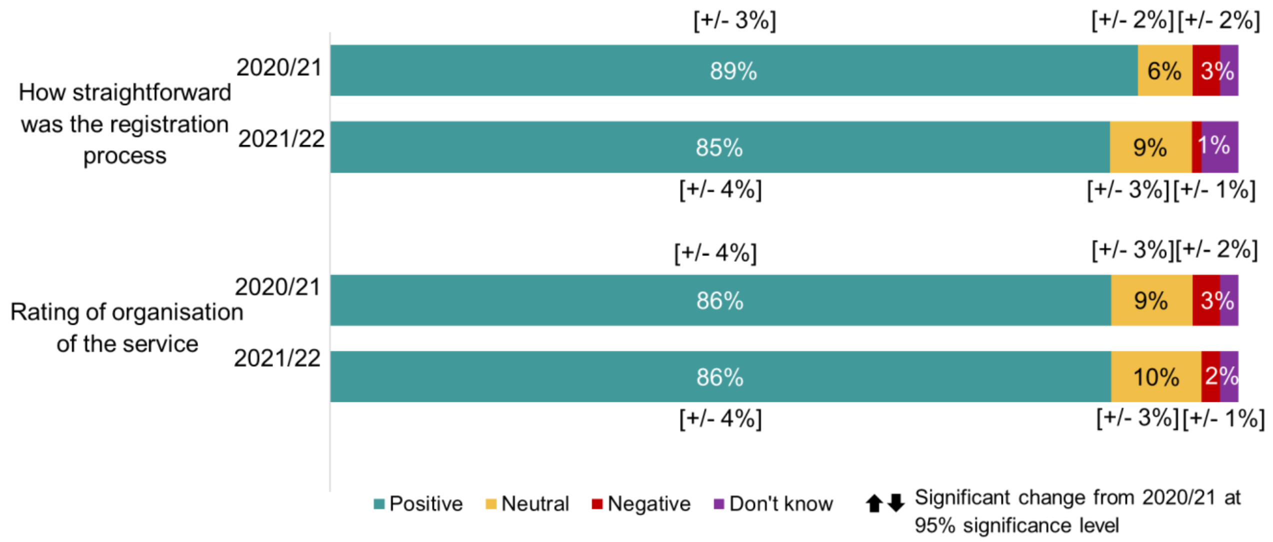
Chart 3.3.4 Rating by business of the specific advice and support they received – Posts



Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=616). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=645). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=633). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=637). Qclarity_2 – The service made clear what I should do next after using it (n=624). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=581). Base: All respondents that used each service (excluding 'not applicable' responses).

Businesses were also positive about how straightforward the Posts registration process was (85%) and the organisation of the service (86%). These findings were in line with the previous year.

Chart 3.3.5 Rating by business of the specific advice and support they received – Posts



Qreg – How straightforward was the registration process for the service? (n=464). Base: All respondents that used the service (excluding non-applicable responses)
Qevent – How would you rate the organisation of the service? (n=477). Base: All respondents that used the service (excluding non-applicable responses).

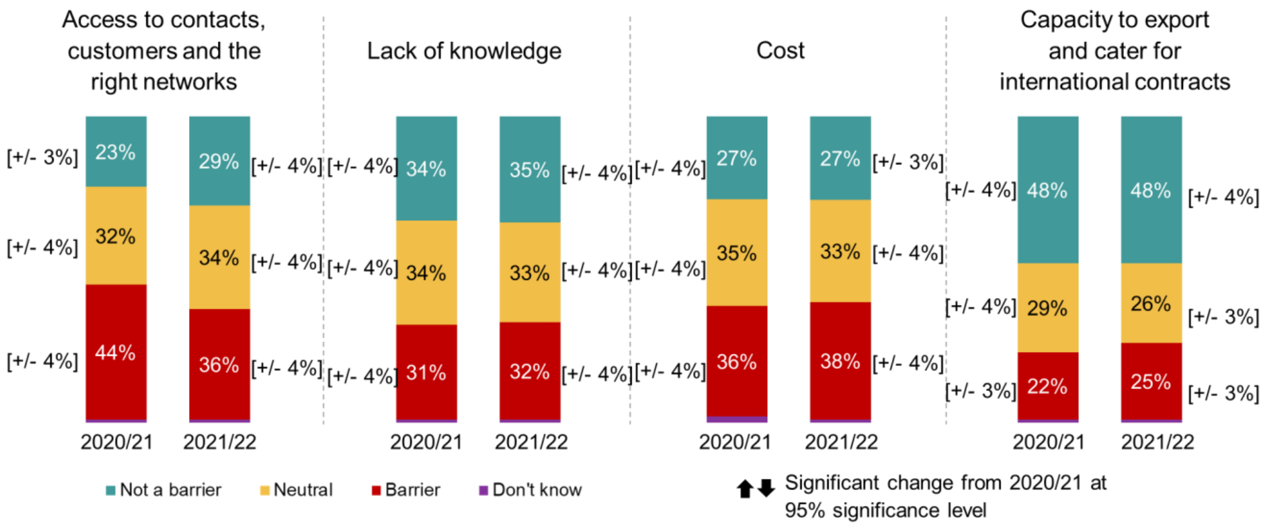
3.3.2. Outcomes of using the Posts service

3.3.2.1 Counteracting the barriers to exporting

Businesses that used the Posts service reported facing barriers to exporting[26]. Two in five (38%) reported cost as a barrier, in line with the previous year (36% in 2020/21). Respondents were split about whether lack of knowledge is a barrier (32%) or not (35%), again in line with the previous year. Businesses were less likely to perceive access to contacts, customers and the right networks as a barrier (36% compared to 44% in 2020/21), although this finding was in line with results from the 2019/20 survey (39%).

[26] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

Chart 3.3.6 Barriers to exporting – Posts

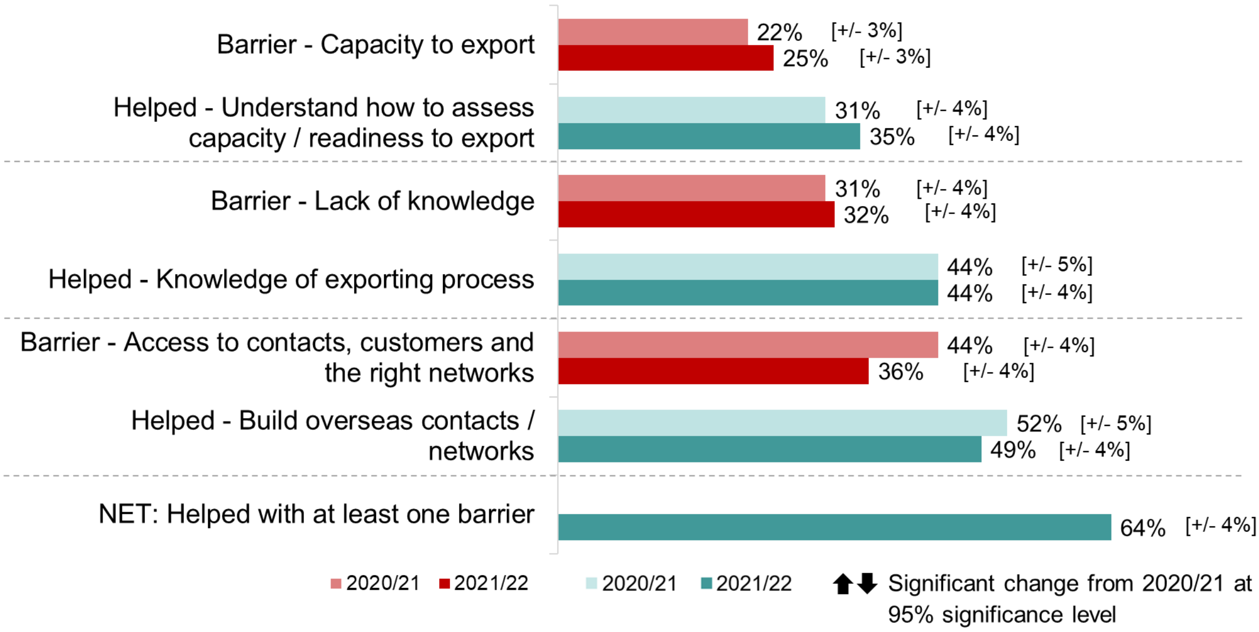


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Posts (excluding 'not applicable' responses) (n=664 to 674).

Lack of knowledge was perceived to be more of a barrier for micro (36%) and medium businesses (37%) than either small or large ones (25% and 22% respectively). Access to networks was also more likely to be seen as a barrier by micro businesses (44%) than by small (35%), medium (28%) or large (31%) businesses. This was also cited as a barrier by businesses with a turnover of up to £500,000 (46%) than those with a turnover £500,000 or more (35%).

Businesses were asked whether using Posts (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using Posts had helped them to build overseas contacts or networks (49%), understand how to increase their knowledge of the exporting process (44%) or to assess their capacity and readiness to export (35%). These findings were in line with the previous year.

Chart 3.3.7 Barriers to exporting and how DIT helped – Posts



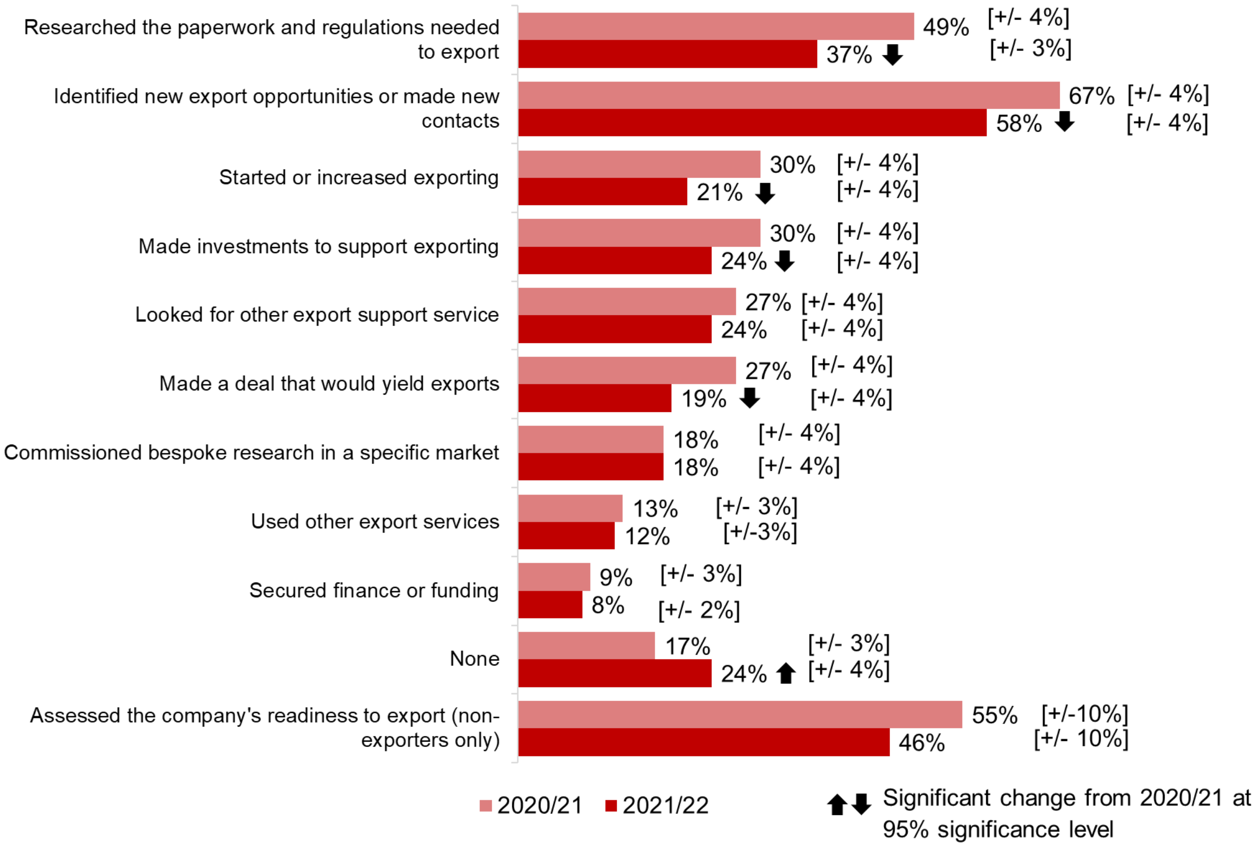
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Posts (excluding 'not applicable' responses) (n=664 to 674).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks/ understand how to assess capacity and readiness to export? Base: All respondents who used Posts (n=685).

3.3.2.2 Taking action

Businesses had taken a range of actions as a result of using Posts. Almost half (46%) of businesses that were not exporting at the time of using the service, had assessed the business' readiness to export. Among all businesses, over half said they had identified new export opportunities or made new contacts (58%). Just over a third (37%) said they had researched the paperwork and regulations needed to export.

Compared with the previous year, businesses were less likely to say they had taken various actions as a result of using Posts. Specifically, businesses were less likely to say they had identified new export opportunities or made new contacts (58% compared to 67% in 2020/21), researched the paperwork and regulations needed to export (37% compared to 49%), started or increased exporting (21% compared to 30%), made investments to support exporting (24% compared to 30%) or made a deal that would yield exports (19% compared to 27%). Overall, a quarter of businesses (24%) said they had not taken any actions as a result of using Posts, higher than the previous year (17% in 2020/21).

Chart 3.3.8 Actions taken as a result of service interaction – Posts

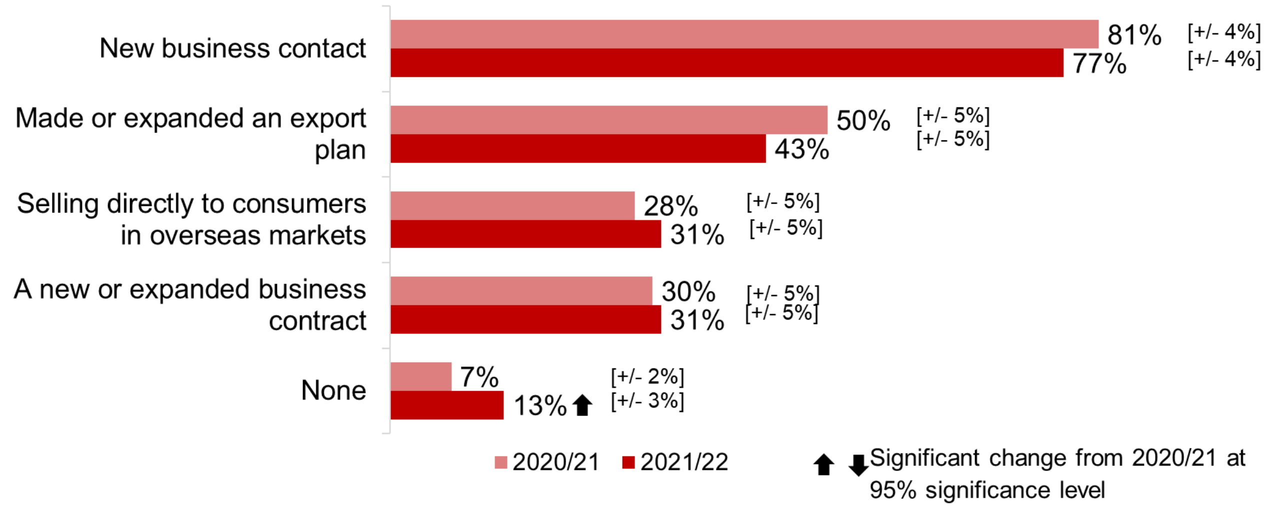


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Posts (n=685); Non-exporters (n=143).

3.3.2.3 Identifying new opportunities

As a result of using Posts, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (77%), followed by making or expanding an export plan (43%), selling directly to consumers in overseas markets (31%) or making a new or expanded business contract (31%). These findings were in line with 2020/21, except that businesses were more likely to say they had not identified any new export opportunities this year (13% compared to 7% in 2020/21).

Chart 3.3.9 Opportunities identified as a result of service interaction – Posts



Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used Posts who had identified a new business contact or new export opportunities as part of the DIT service (n=461).

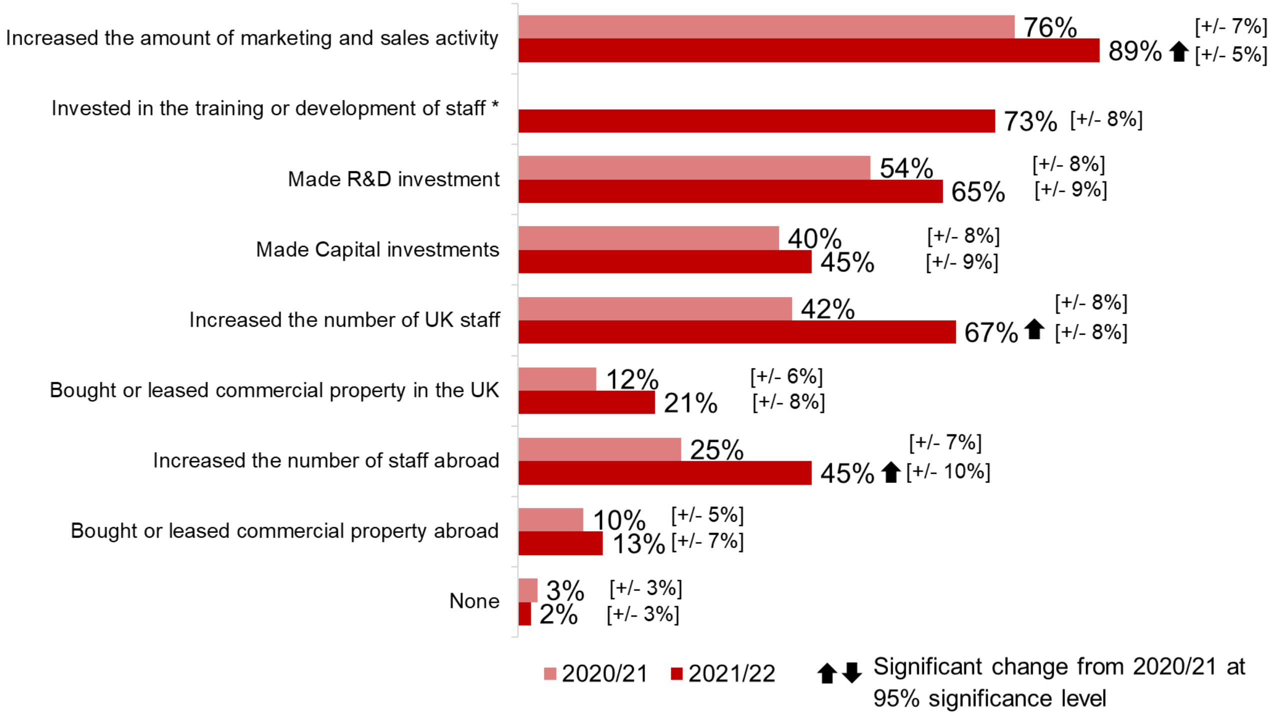
Among businesses that had identified a new business contact as part of the DIT service, half (51%) had made contact with a buyer, while just over a third (36%) had made contact with a distributor.

3.3.2.4 Making investments

Using the Posts service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the Posts service (24% overall), nine in ten (89%) said they had increased their marketing and sales activity, while more than seven in ten (73%) said they had invested in the training or development of staff. Around two-thirds had increased the number of UK staff (67%) or had made a Research and Development investment (65%).

Compared to the previous year, businesses were more likely to have increased their marketing and sales activity (89% compared to 76% in 2020/21), increased the number of UK staff (67% compared to 42%) and increased the number of staff abroad (45% compared to 25%).

Chart 3.3.10 Type of investments made as a result of DIT service – Posts

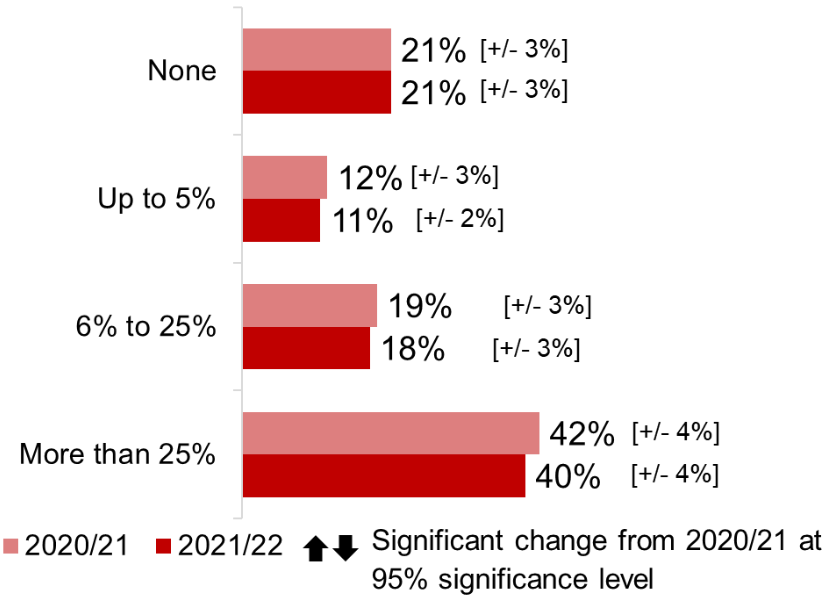


Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Only answers given by more than 3% of respondents are shown. Base: All respondents who had used Posts and had made investments to support exporting (n=154).

3.3.3. Service use by firmographics and export behaviour

Two thirds of Posts businesses had a high turnover of £500,000 or more (68%), while a third had a lower turnover (32%), in line with the previous year. Two in five firms (40%) reported that more than a quarter of their turnover came from exporting.

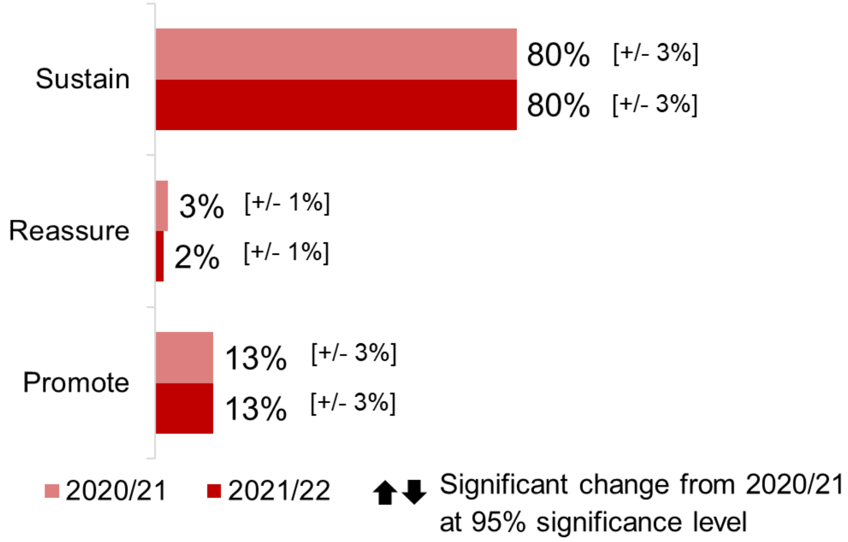
Chart 3.3.11 Turnover



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Posts (n=685).

Current exporters made up the majority of businesses using the Posts service. Four in five businesses (80%) were currently exporting ('Sustain'). One in eight (13%) had never exported before ('Promote'), while only two percent had exported before but not in the past 12 months ('Reassure')[27]. These findings were in line with the previous year.

Chart 3.3.13 Exporter status

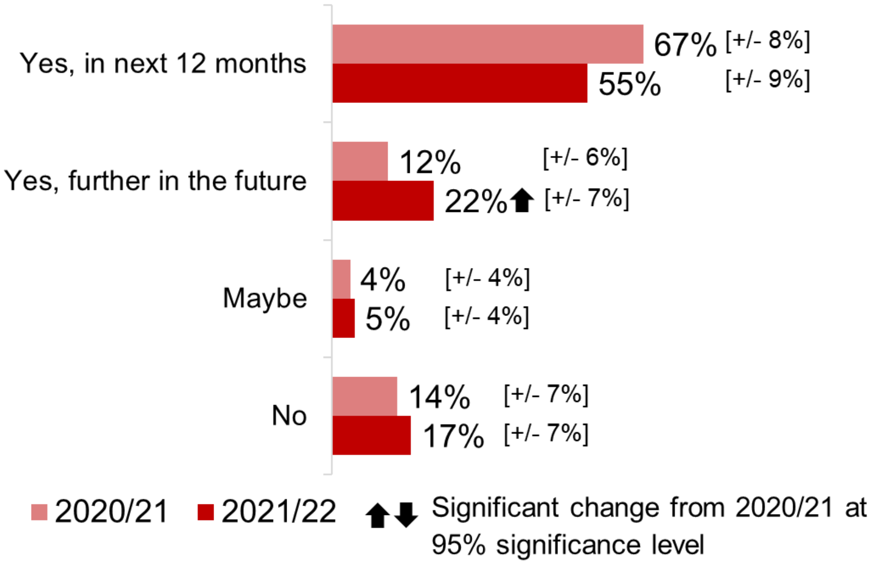


Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Posts (n=685).

Most former exporters using the Posts service had plans to export again. More than half (55%) of those that were not currently exporting (but had done so previously) reported planning to export in the next 12 months. A further one in five (22%) planned to export further in the future, higher than in the previous year (12% in 2020/21).

Chart 3.3.14 Non-exporter plans to sell overseas

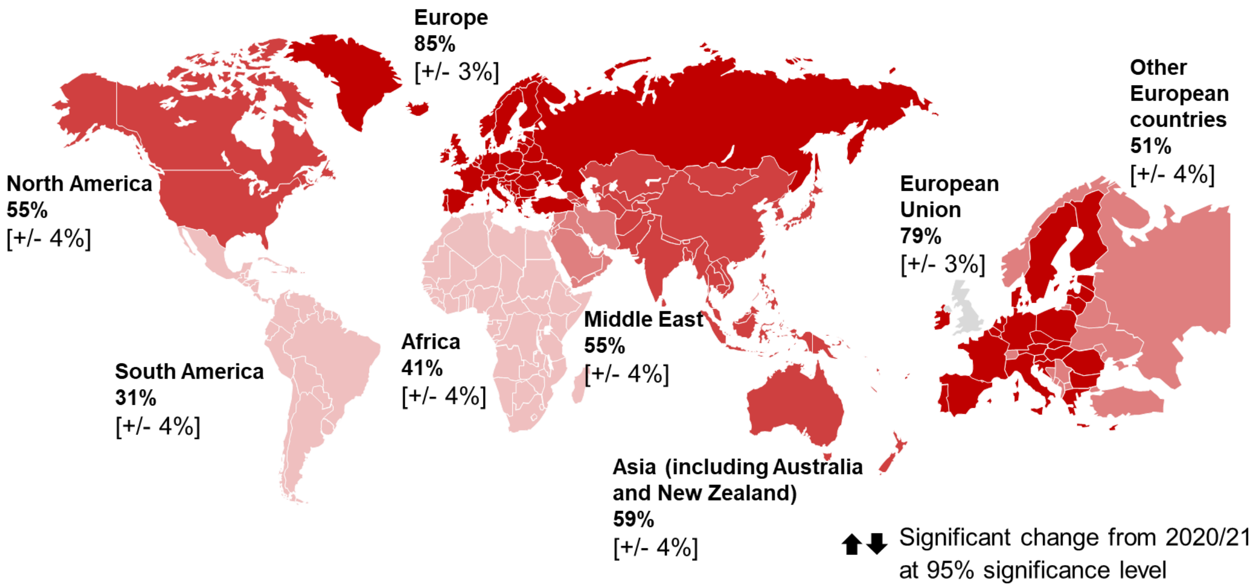
[27] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All respondents who used Posts and who are not currently exporting but have previously sold goods or services overseas (n=133).

Europe remained the most common export market among Posts businesses (85%), in line with the previous year (82% in 2020/21). Among those that were currently exporting or had done so previously, four in five (79%) exported to the European Union, followed by Asia (59%), North America (55%), the Middle East (55%) and non-EU European countries (51%). A third (31%) of those that were currently exporting (or had done so previously) had exported to Latin America and the Caribbean, making this region the least common export market among Posts businesses. These findings were in line with the previous year.

Chart 3.3.15 Regions organisations export to or exported to previously – Posts



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Posts and who have exported (n=561).

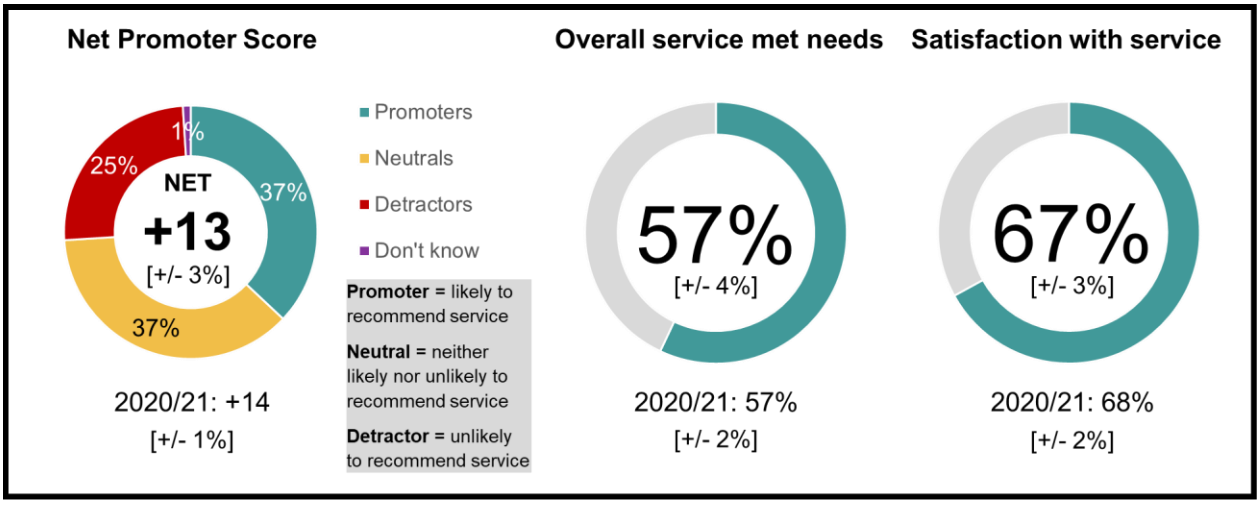
Table 3.3.3 Regions organisations export to or exported to previously – Posts

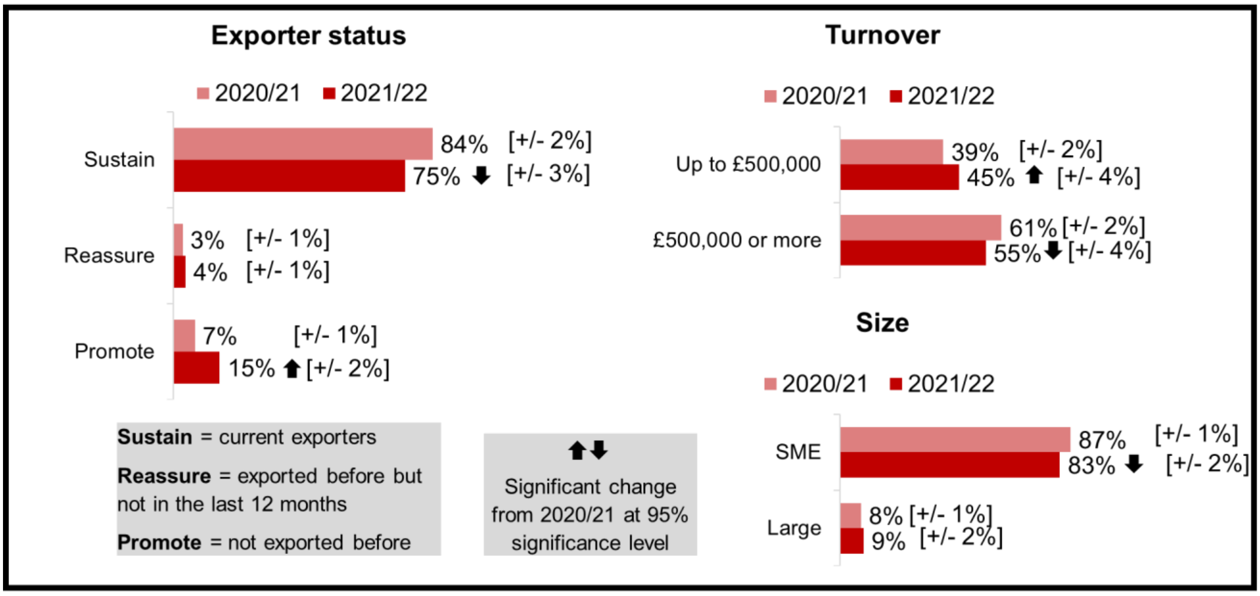
	2020/21	CI (+/-)	2021/22	CI (+/-)	Change
Europe	82%	3%	85%	3%	-
European Union	78%	4%	79%	3%	-
Other European countries	53%	4%	51%	4%	-
Asia (including Australia and New Zealand)	64%	4%	59%	4%	-
North America	54%	4%	55%	4%	-
Middle East	55%	4%	55%	4%	-
Africa	39%	4%	41%	4%	-
Latin America and the Caribbean	29%	4%	31%	4%	-

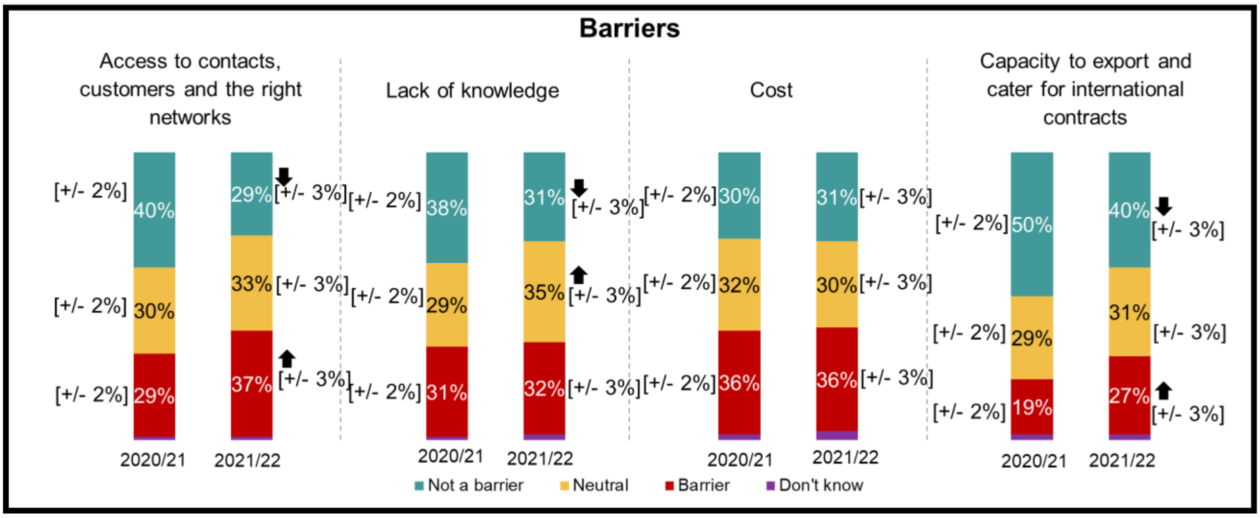
↑↓ Significant change from 2020/21 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Posts and who have exported (n=561).

Summary: Webinars







3.4. Webinars

Webinars are organised by International Trade Advisers, Overseas Posts, and DIT HQ teams. They are delivered by experts from both private and public sector organisations. The primary aim is to provide information to a target audience ranging from experienced exporters to businesses that are new to exporting. In 2020/21 additional webinars were delivered on themes around reacting to the Covid-19 pandemic, and in preparation for the end of the transition period of the United Kingdom's exit from the European Union.

This chapter explores satisfaction with the Webinars service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 1,155 businesses that used Webinars between April 2021 and March 2022.

Key changes since 2020/21:

Attitudes to the advice and support provided by the Webinars service were mostly in line with the previous year. Fewer businesses gave negative ratings about the clarity of the steps they needed to take when using the service (4% compared to 7% in 2020/21). However, businesses were less likely to be positive about the Webinars registration process (88% thought this was straightforward, compared to 91% in 2020/21).

Respondents were more likely to report barriers to exporting than in the previous year. Specifically, this applied to access to networks (37% compared to 29% in 2020/21) and capacity to export and cater for international contracts (27% compared to 19% in 2020/21). In addition, fewer respondents said lack of knowledge was *not* a barrier (31% compared to 38% in 2020/21). However, when asked whether using Webinars had helped them to overcome these barriers to exporting, businesses were more likely to report that using Webinars had helped them understand how to increase their knowledge of the exporting opportunities that were available (52% compared to 41% in 2020/21).

As a result of using this service, more businesses said they had identified new export opportunities or made new contacts (49% compared to 35% in 2020/21), started or increased exporting (19% compared to 14% in 2020/21), commissioned bespoke research in a specific market (17% compared to 10% in 2020/21) and secured finance or funding (7% compared to 5% in 2020/21). However, the proportion of businesses saying they had researched the paperwork and regulations needed to export decreased from the previous year (from 57% to 42% in 2021/22).

Businesses were more likely to have made investments this year. Specifically, they were more likely to have made R&D investment (66% compared to 52% in 2020/21), increased the number of UK staff (51% compared to 40% in 2020/21), increased the number of staff abroad (32% compared to 21% in 2020/21) and bought or leased commercial property in the UK (17% compared to 10% in 2020/21).

Exporting accounted for a smaller proportion of businesses' turnover this year. Businesses were less likely to report that over a quarter of their turnover came from exporting (36% compared to 42% in 2020/21) and were more likely to say that none of their turnover was accounted for by exports (28% compared to 18% in 2020/21).

Overall, businesses were less likely to be in the 'Sustain' category as current exporters (75% compared to 84% in 2020/21) and were more likely to say they had never exported before, the 'Promote' category (15% compared to 7% in 2020/21).

More non-exporting respondents had plans to start selling overseas in the next 12 months, with over half planning to export in the next 12 months (56% compared to 44% in 2020/21), while only one in five (19%) had no plans to export (compared to 35% in 2020/21).

Businesses that were currently exporting or had done so previously were less likely to export to Europe (79% compared to 87% in 2020/21) and specifically to the European Union (73% compared to 84% in 2020/21) and non-EU European countries (50% compared to 58% in 2020/21). They were also less likely to export to Asia (58% compared to 62% in 2020/21) and North America (53% compared to 58% in 2020/21). There was also an increase in the proportion exporting to Africa (42% compared to 38% in 2020/21).

3.4.1. Satisfaction with the Webinars service

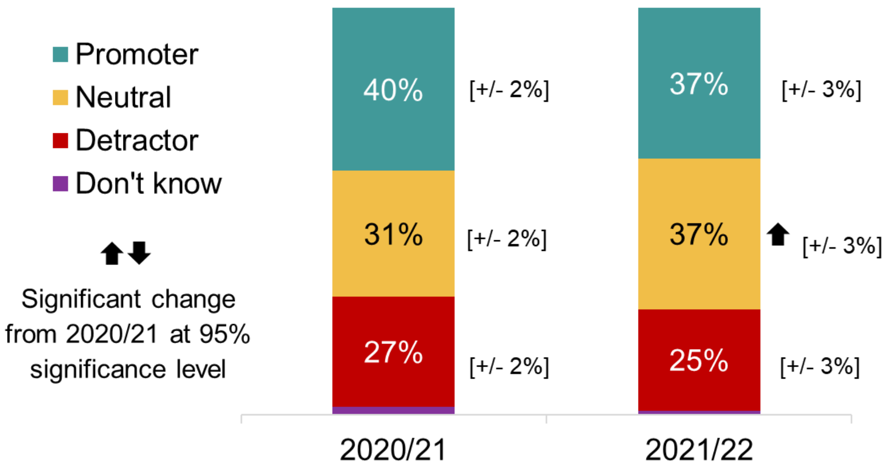
3.4.1.1 Service performance

Businesses gave a mixed response as to whether they would recommend the Webinars service to colleagues and business associates. Just over a third of respondents (37%) were 'Promoters', i.e. likely to recommend the service, and a quarter (25%) were 'Detractors', i.e. unlikely to recommend the service[28]. These individual ratings were in line with the previous year, although there was an increase in the proportion of neutral ratings (37% compared to 31% in 2020/21).

The Net Promoter Score ('Promoters' minus 'Detractors') was +13, in line with the previous year (+14 in 2020/21).

The Net Promoter Score was higher among large businesses (+28) than among SMEs (+13). It was also higher among businesses with a turnover of £500,000 or more (+20) compared to those with a turnover of up to £500,000 (+4).

Chart 3.4.1 Likelihood of recommending service (NPS) – Webinars



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Webinars (n=1,155).

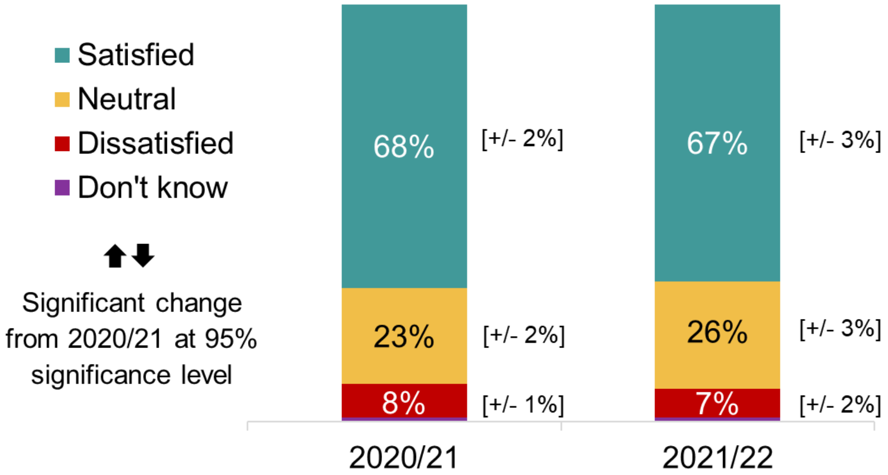
When asked about **suggestions to improve the service**, a third of respondents said that better communication (33%) would improve the Webinars service, while the same proportion asked for better support (32%). Specifically, the most frequently suggested improvement for the service was introducing more sector or industry-specific services (22%), followed by more communication or information (18%), better quality information (12%), and better follow-up (11%).

3.4.1.2 Satisfaction

[28] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

Satisfaction with Webinars stayed consistent with the previous year. Two thirds of respondents (67%) said they were satisfied with their experience (compared to 68% in 2020/21), and seven percent said they were dissatisfied (in line with 8% in 2020/21)[29].

Chart 3.4.2 Satisfaction with service - Webinars



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Webinars (excluding 'not applicable' responses) (n=1,147).

Of the 75 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reasons for dissatisfaction**[30] were feeling that they did not get enough information or advice (44%) and that the service did not do anything for them or did not help them (40%). Around half as many reported that the advice was more relevant to different types of businesses (17%). These findings were in line with the previous year.

3.4.1.3 Whether overall service met needs

The majority of businesses were positive that the Webinars service had met their needs; almost six in ten (57%) rated it as good, and around one in ten (11%) rated it as poor[31]. These findings were in line with the previous year.

Large businesses were more likely to say that the Webinars service had met their needs (78%), compared to SMEs (57%).

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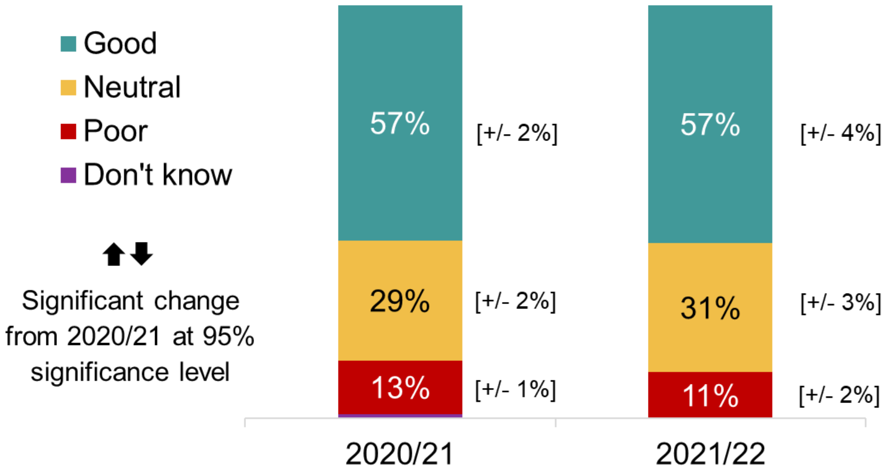
[29] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.
[30] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.
[31] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.

Chart 3.4.3 Rating of whether overall service met needs – Webinars



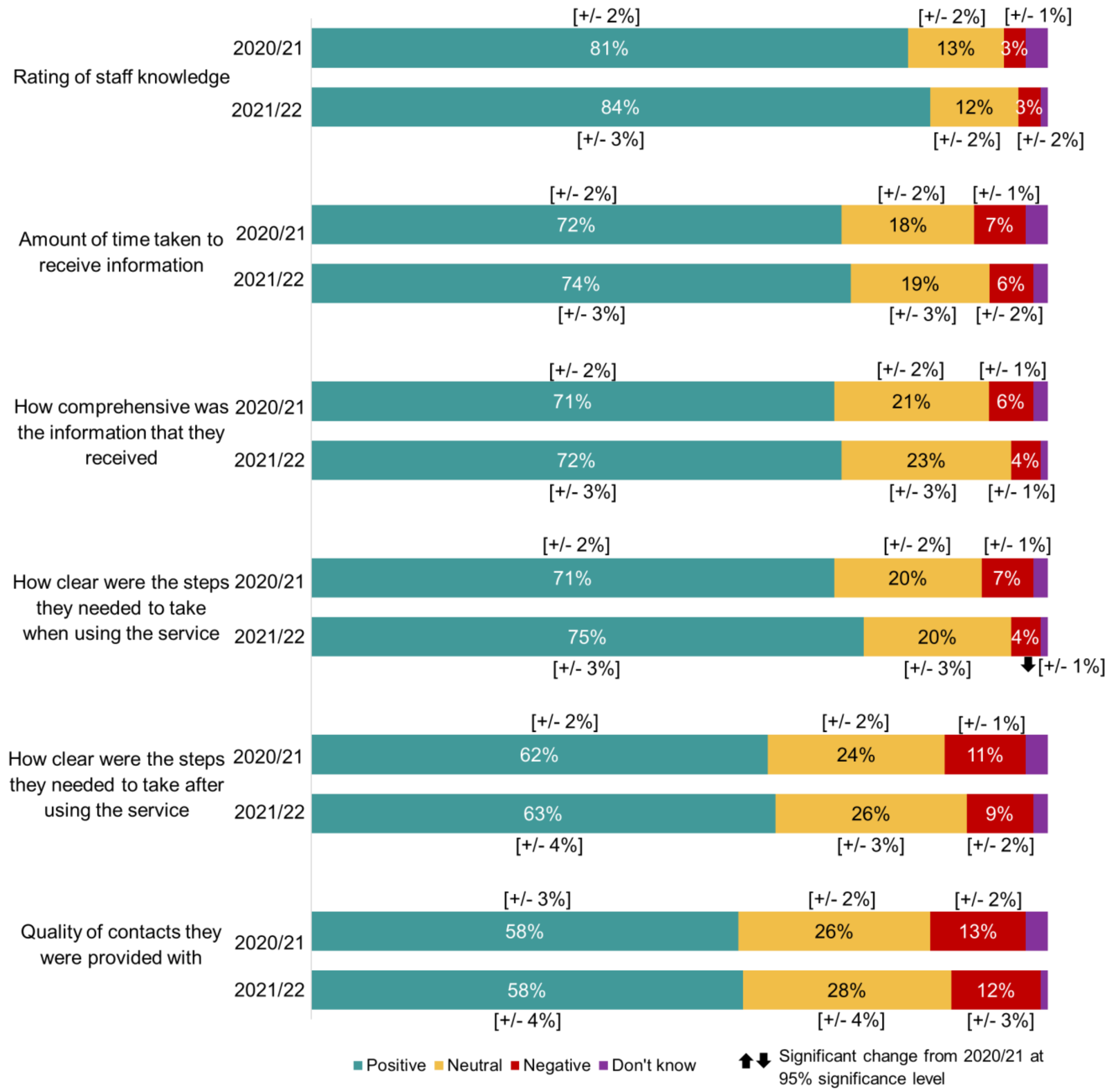
Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Webinars (excluding 'not applicable' responses) (n=1,120).

Businesses were most positive about staff knowledge (84%), followed by how clear they were on the steps that they needed to take when using the service (75%), the amount of time taken to receive information (74%) and how comprehensive the information they received was (72%). They were least positive about the quality of contacts they were provided with (58%)[32]. Findings were in line with the previous year, except that fewer businesses gave negative ratings about the clarity of the steps they needed to take when using the service (4% compared to 7% in 2020/21).

Large businesses were more likely than SMEs to be positive about how comprehensive the information they received was (84% compared to 72%) and how clear they were on the steps they needed to take, both when using the service (92% compared to 75% respectively) and afterwards (76% compared to 64% respectively). Businesses with a turnover of £500,000 or more were also more likely to be positive about how clear they were on the steps they needed to take, both when using the service (80% compared to 70% of those with a turnover of up to £500,000) and afterwards (70% compared to 60% respectively).

[32] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

Chart 3.4.4 Rating by business of the specific advice and support they received – Webinars

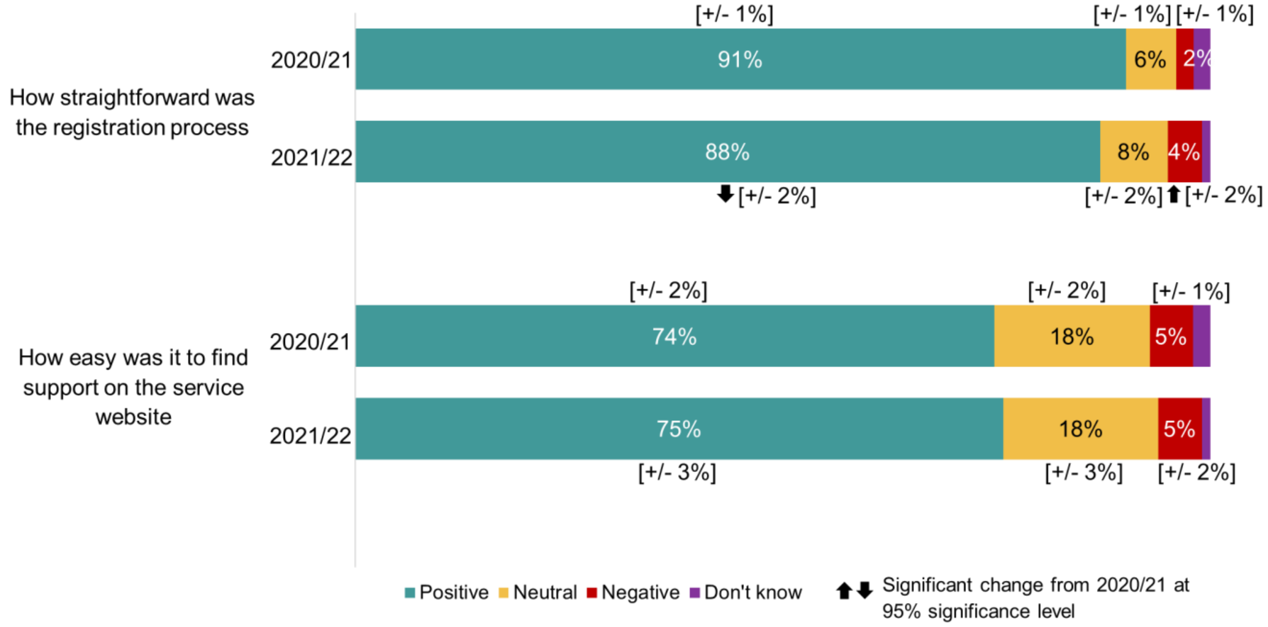


Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=1,079). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=1,012). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=1,112). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=1,134). Qclarity_2 – The service made clear what I should do next after using it (n=1,098). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=868). Base: All respondents that used each service (excluding 'not applicable' responses).

Businesses were positive about how straightforward the Webinars registration process was, although this was lower than the previous year (88% compared to 91% in 2020/21). Three-quarters of businesses (75%) were positive about how easy it was to find support on the service website; this was in line with the previous year.

Medium sized businesses were less positive about how easy it was to find support on the service website (67%), compared to micro or small businesses (77%).

Chart 3.4.5 Rating by business of the specific advice and support they received – Webinars



Qreg – How straightforward was the registration process for the service? Base: All respondents that used the service (excluding non-applicable responses) (n=1,122).
Qfindinfo – How easy was it to find support on the service website? Base: All firms that dealt with Digital Services (excluding non-applicable responses) (n=1,074).

3.4.2. Outcomes of using the Webinars service

3.5.2.1 Counteracting the barriers to exporting

Businesses that used the Webinars service reported facing barriers to exporting[33]. Just over a third (37%) reported that access to networks was a barrier, while a similar proportion (36%) said that cost was a barrier. Around a third (32%) perceived lack of knowledge as a barrier, while around a quarter (27%) thought that their capacity to export was a barrier.

Respondents were more likely to report barriers to exporting than in the previous year. Specifically, this applied to access to networks (37% compared to 29% in 2020/21) and capacity to export and cater for international contracts (27% compared to 19% in 2020/21). In addition, fewer respondents said lack of knowledge was *not* a barrier (31% compared to 38% in 2020/21).

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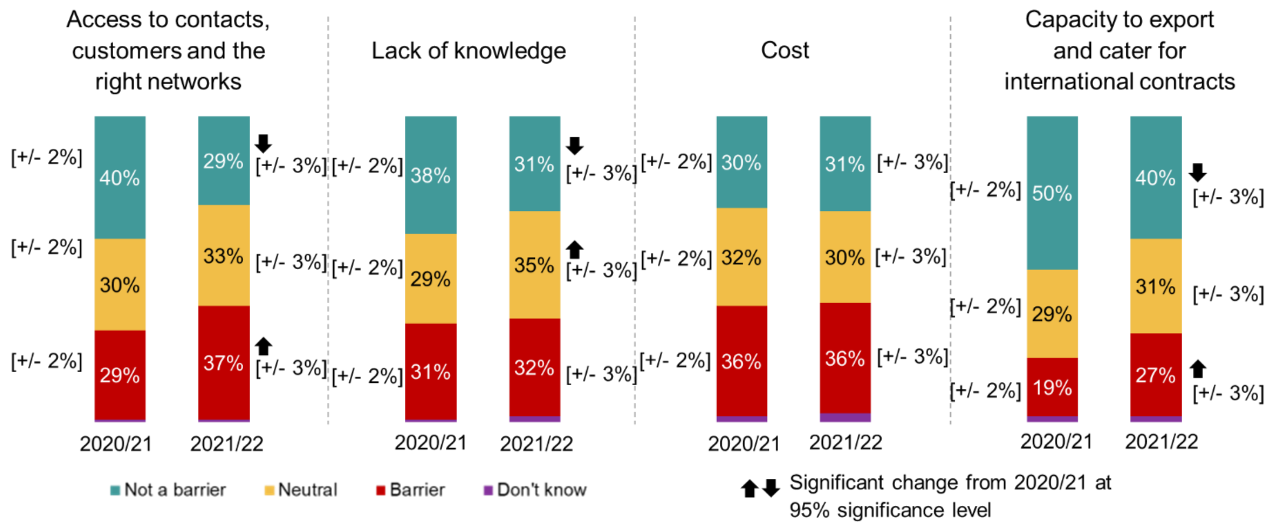
[33] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

Chart 3.4.6 Barriers to exporting – Webinars

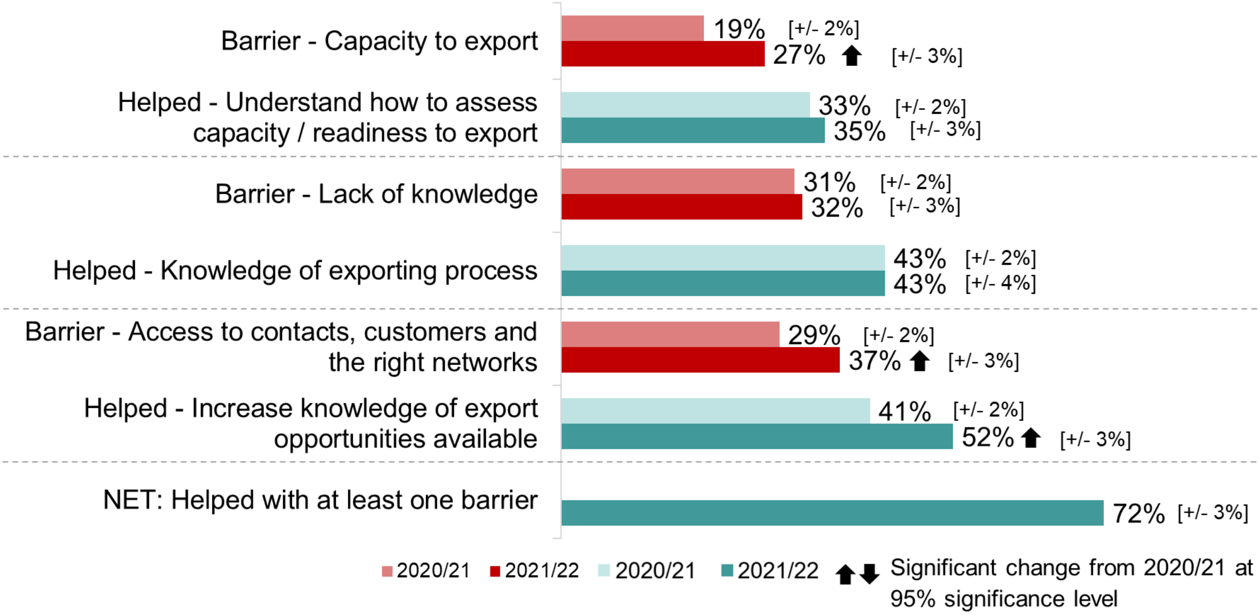


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Webinars (excluding 'not applicable' responses) (ranging from n=1,096 to n=1,115).

All four of the barriers were cited more frequently by businesses with a turnover of up to £500,000, compared to those with a turnover £500,000 or more. This applied to access to networks (43% compared to 37%), cost (41% compared to 31%), lack of knowledge (37% compared to 29%) and capacity (35% compared to 24%). Micro firms were also more likely to cite access to networks as a barrier (43% compared to 36% of small, 29% of medium and 20% of large businesses), and to cite capacity as a barrier (35% compared to 21% of small, 21% of medium and 20% of large businesses).

Businesses were asked whether using Webinars (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Businesses reported that using Webinars had helped them understand how to increase their knowledge of the exporting opportunities that were available (52%, up from 41% in 2020/21). Businesses also reported that using Webinars had helped them understand how to increase their knowledge of the exporting process (43%) and had helped them to understand how to assess their capacity and readiness to export (35%). These findings were in line with the previous year.

Chart 3.4.7 Barriers to exporting and how DIT helped – Webinars



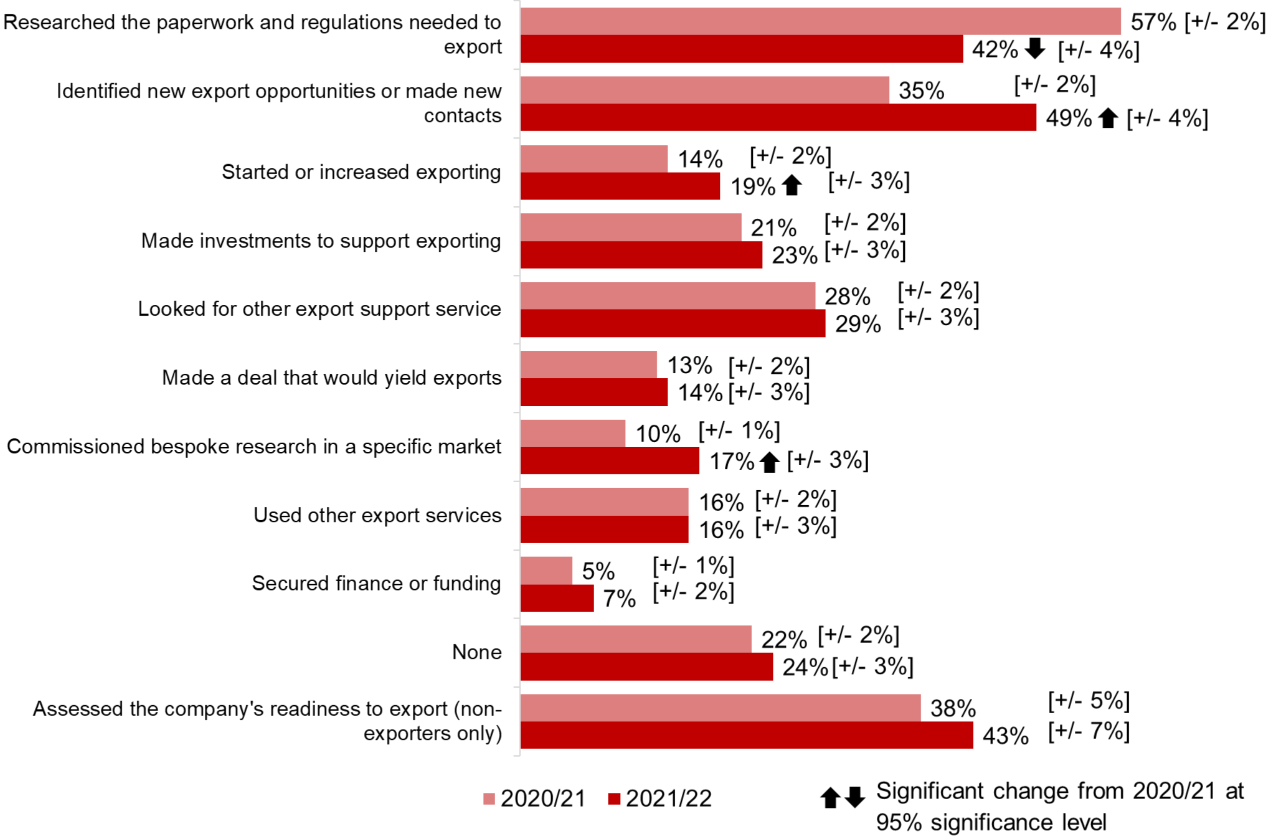
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Webinars (excluding 'not applicable' responses) (ranging from n=1,096 to n=1,115).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks/ understand how to assess capacity and readiness to export? Base: All respondents who used Webinars (n=1,155).

3.4.2.2 Taking action

Businesses had taken a range of actions as a result of using Webinars. Around four in ten businesses (43%) that were not exporting at the time of using the service, had assessed the business' readiness to export. Among all businesses, around half said they had identified new export opportunities or made new contacts (49%). Around four in ten (42%) said they had researched the paperwork and regulations needed to export, while three in ten (29%) had looked for other export support services.

Businesses were more likely to have taken action than in the previous year. Specifically, they were more likely to have identified new export opportunities or made new contacts (49% compared to 35% in 2020/21), started or increased exporting (19% compared to 14% in 2020/21), commissioned bespoke research in a specific market (17% compared to 10% in 2020/21) and secured finance or funding (7% compared to 5% in 2020/21). However, the proportion of businesses saying they had researched the paperwork and regulations needed to export decreased from the previous year (from 57% to 42% in 2021/22).

Chart 3.4.8 Actions taken as a result of service interaction – Webinars

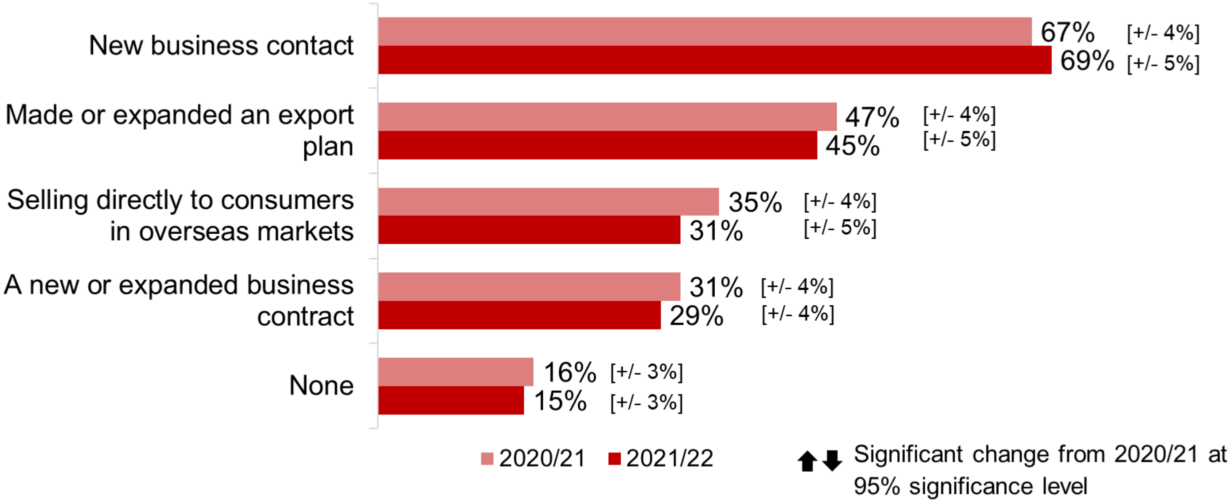


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Webinars (n=1,155); Non-exporters (n=290).

3.4.2.3 Identifying new opportunities

As a result of using Webinars, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (69%), followed by making or expanding an export plan (45%), selling directly to consumers in overseas markets (31%) or making a new or expanded business contract (29%). These findings were in line with 2020/21.

Chart 3.4.9 Opportunities identified as a result of service interaction – Webinars



Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used Webinars who had identified a new business contact as part of the DIT service (n=612).

Among businesses that had identified a new business contact as part of the DIT service, over two in five (44%) had made contact with a buyer and a third (34%) had made contact with a distributor.

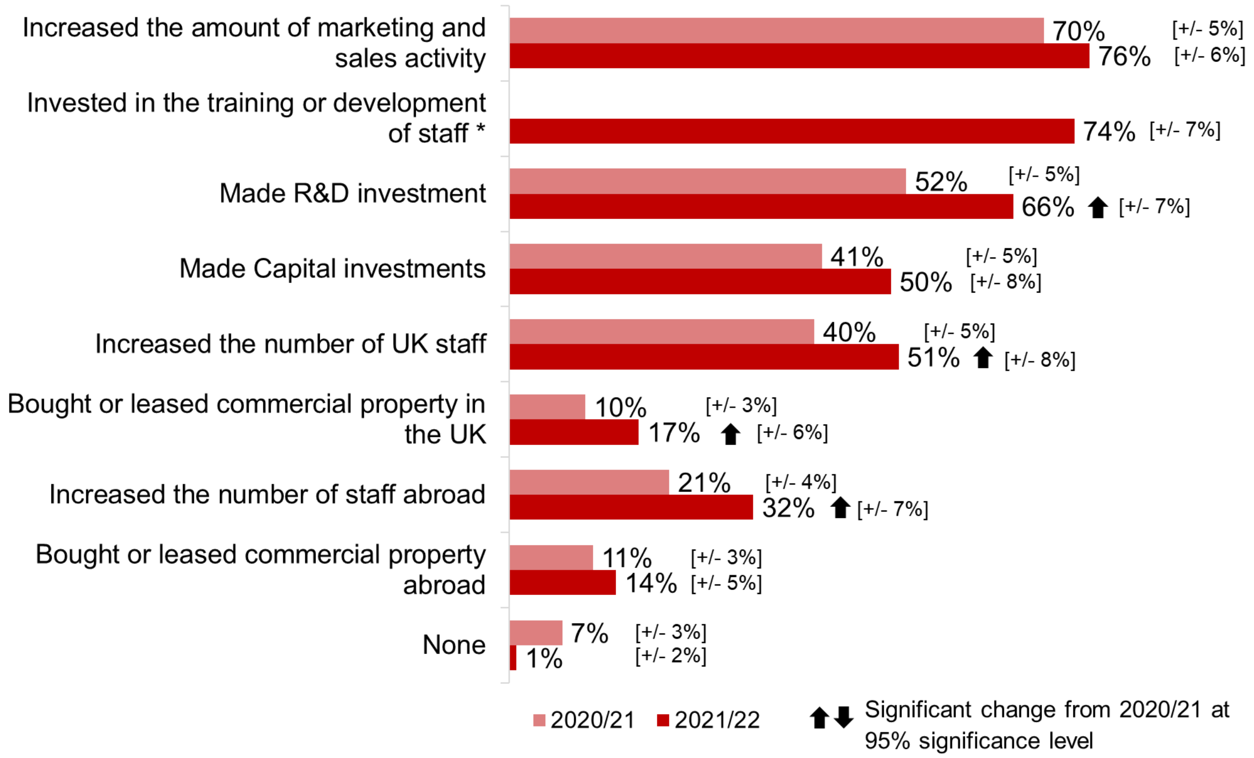
3.4.2.4 Making investments

Using the Webinars service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the Webinars service (23% overall), three quarters (76%) said they had increased their marketing and sales activity, while a similar proportion (74%) had invested in the training or development of staff. Two thirds made a Research and Development investment (66%) and half made capital investments (50%). In addition, half (51%) increased the number of UK staff and a third increased the number of staff abroad (32%).

Compared to the previous year, businesses were more likely to have made R&D investment (66% compared to 52% in 2020/21), increased the number of UK staff (51% compared to 40% in 2020/21), increased the number of staff abroad (32% compared to 21% in 2020/21) and bought or leased commercial property in the UK (17% compared to 10% in 2020/21).

Businesses with a higher turnover (£500,000 or more) were more likely to say they had increased their marketing and sales activity (84% compared to 66% of those with a turnover of less than £500,000) or that they had increased the number of UK staff (60% compared to 39% respectively)[34].

Chart 3.4.10 Type of investments made as a result of DIT service – Webinars



*Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Only answers given by more than 3% of respondents are shown. Base: All respondents who had used Webinars and had made investments to support exporting (n=244). * New code in 2021/22.*

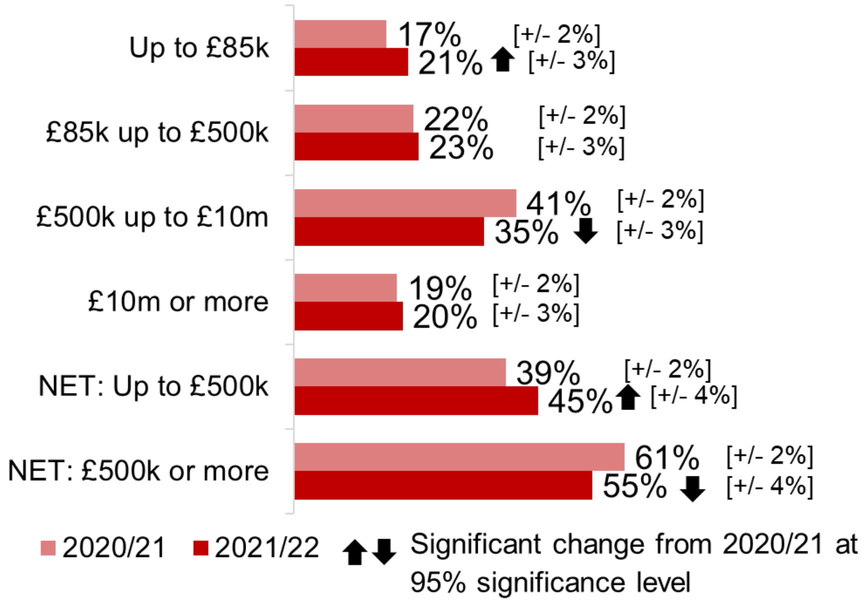
[34] As this question has a low base size, analysis of sub-groups should be treated with caution.

3.4.3. Service use by firmographics and export behaviour

Webinars service use was split between businesses with high turnovers of £500,000 or more (55%) and those with lower turnovers (45%). Compared to the previous year, there were more businesses with a lower turnover of up to £500,000 (45% compared to 39% in 2020/21) and fewer with a turnover of £500,000 or more (55% compared to 61% in 2020/21).

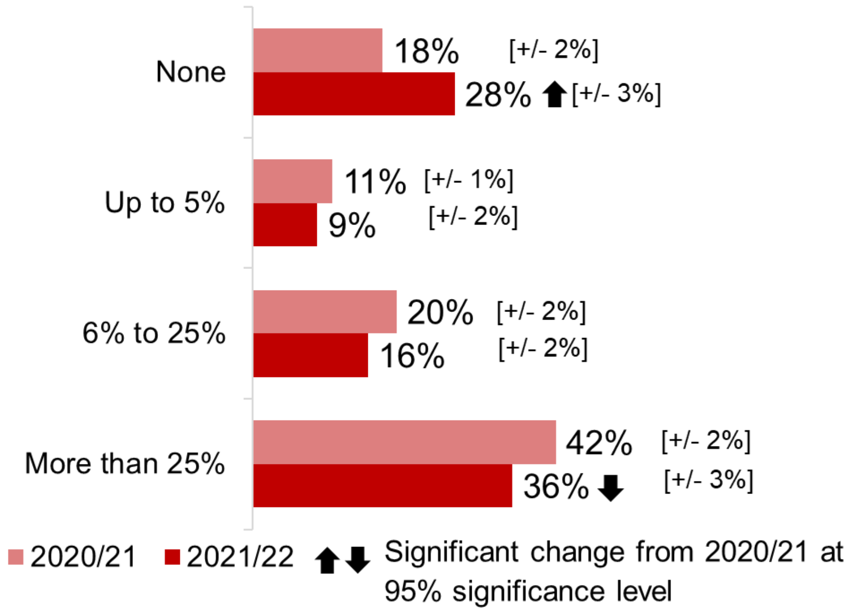
Just over a third of firms (36%) reported that more than a quarter of their turnover came from exporting. This was lower than in the previous year (42% in 2020/21), while the proportion that said none of their turnover was accounted for by exports increased this year (28% compared to 18% in 2020/21).

Chart 3.4.11 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used Webinars (excluding Don't know/Refused) (n=770).

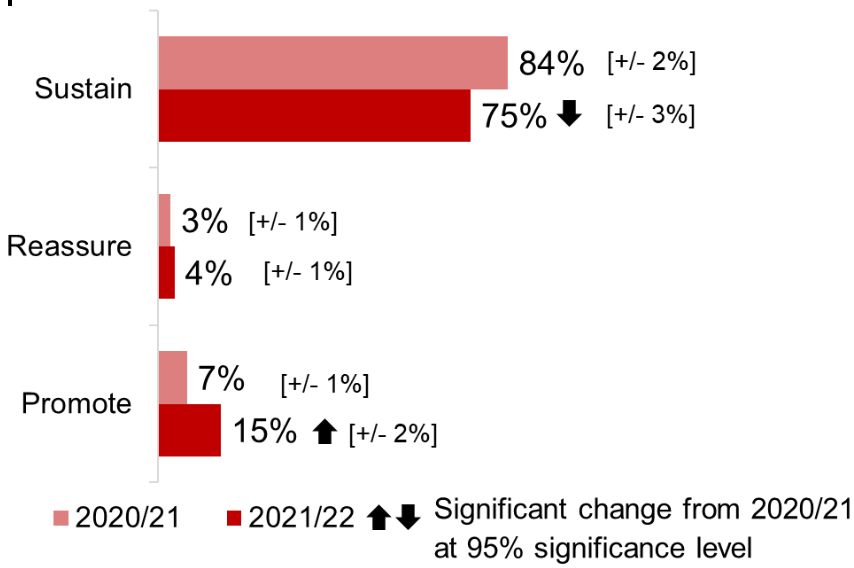
Chart 3.4.12 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Webinars (n=1,155).

Current exporters made up the majority of businesses using the Webinars service. Three quarters of businesses were currently exporting ('Sustain'), although this was lower than in the previous year (75% compared to 84% in 2020/21). Fifteen percent had never exported before ('Promote'), higher than in the previous year (15% compared to 7% in 2020/21). Only four percent had exported before but not in the past 12 months ('Reassure'), in line with the previous year[35].

Chart 3.4.13 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Webinars (n=1,155).

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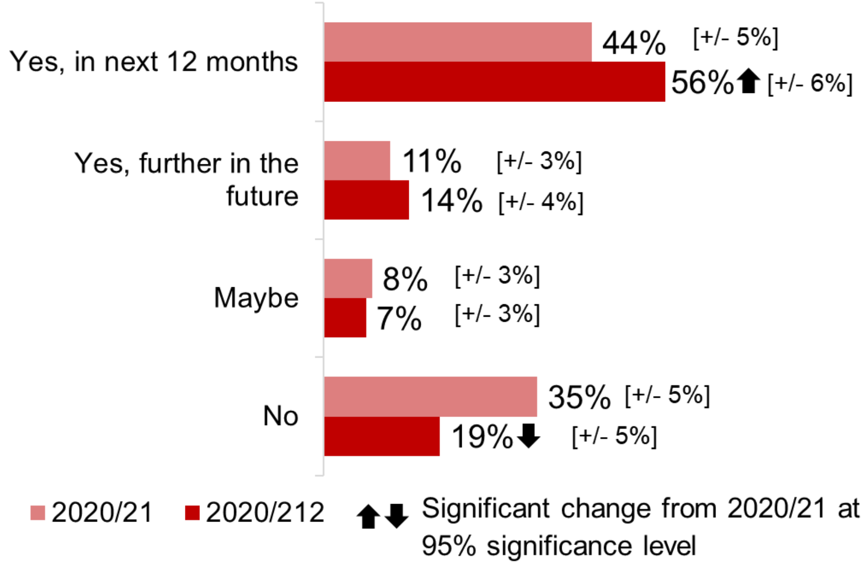
35 Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

Most former exporters using the Webinars service had plans to export again, and the proportion increased from the previous year. Over half (56%) of those that were not currently exporting (but had done so previously), reported planning to export in the next 12 months (compared to 44% in 2020/21). Around one in five (19%) had no plans to export, lower than in the previous year (35%).

Chart 3.4.14 Non-exporter plans to sell overseas

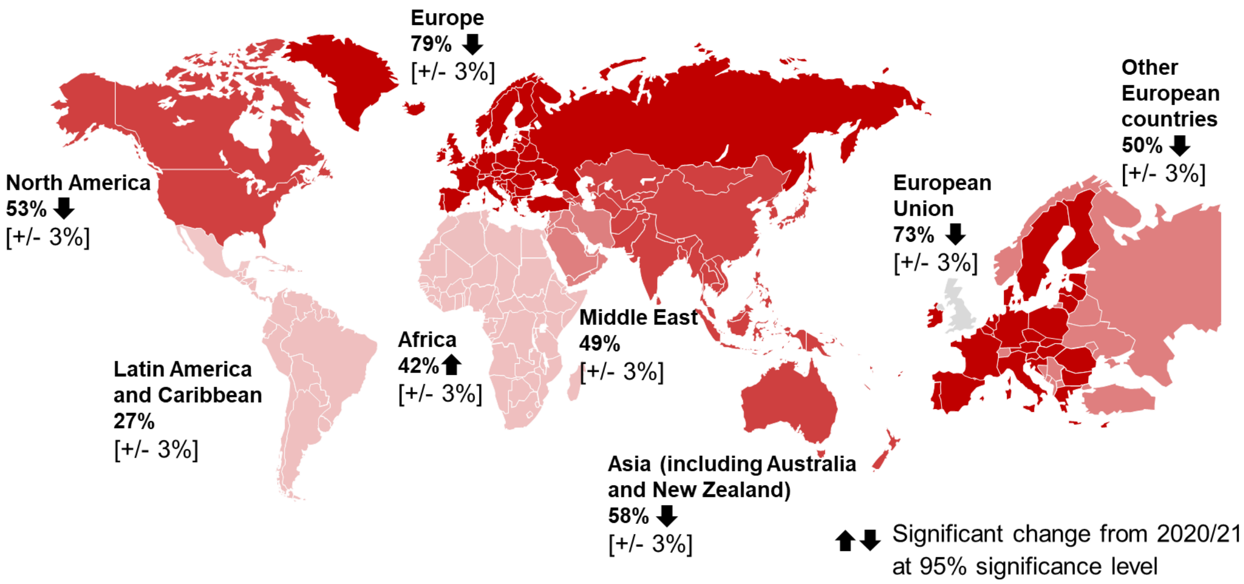


Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All respondents who used Webinars and who are not currently exporting but have previously sold goods or services overseas (n=304).

Europe remained the most common export market among Webinars businesses, although the proportion exporting to Europe was lower than in the previous year (79% compared to 87% in 2020/21). Businesses were also less likely to export to other markets. Among those that were currently exporting or had done so previously, around three quarters (73%) exported to the European Union (compared to 84% in 2020/21), followed by Asia (58% compared to 62%), North America (53% compared to 58%) and non-EU European countries (50% compared to 58%).

Half of businesses exported to the Middle East (49%, in line with the previous year), while around four in ten exported to Africa (42%, up from 38% in 2020/21). Around a quarter (27%) of those who were currently exporting (or had done so previously) had exported to Latin America and the Caribbean (in line with the previous year), making this region the least common export market among Webinars businesses.

Chart 3.4.15 Regions organisations export to or exported to previously – Webinars



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Webinars and who have exported (n=914).

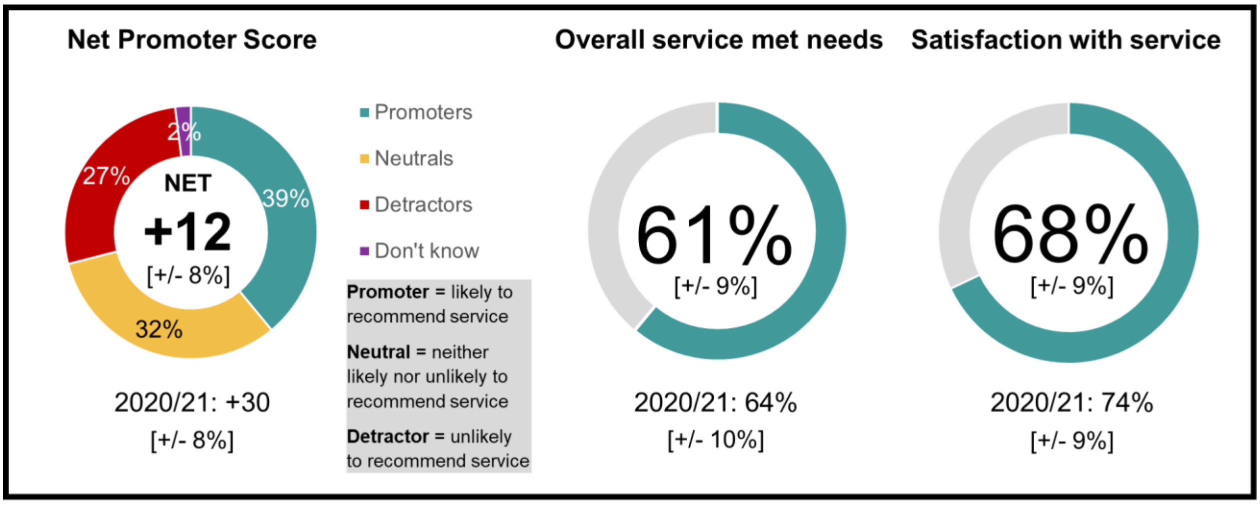
Table 3.4.1 Regions organisations export to or exported to previously – Webinars

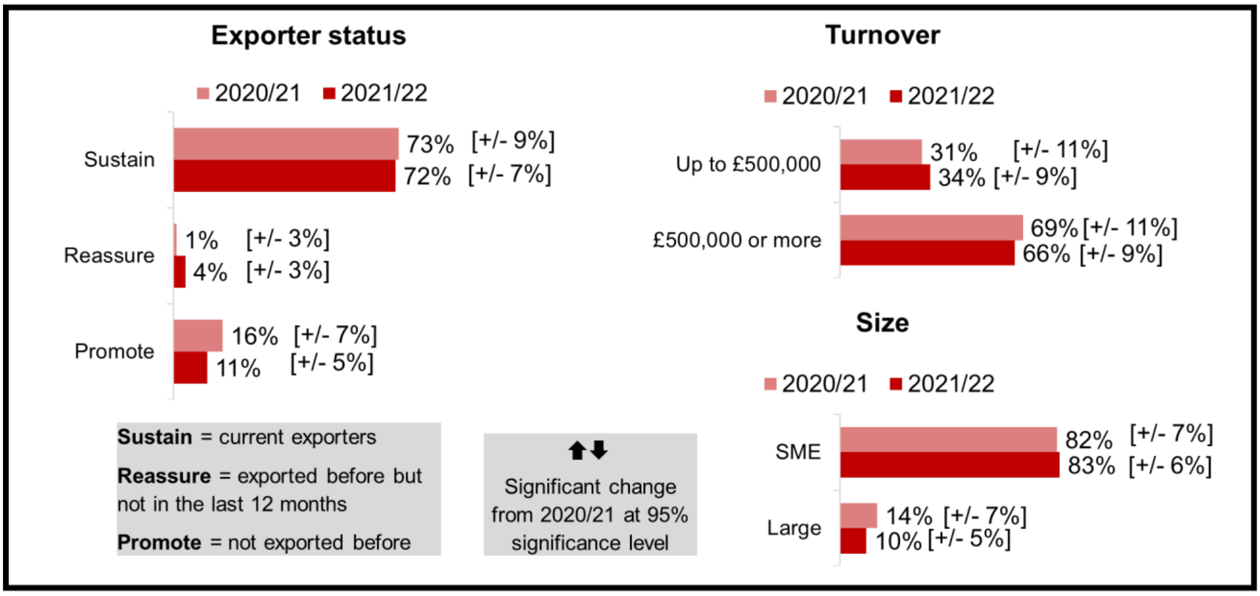
	2020/21	CI (+/-)	2021/22	CI (+/-)	Change
Europe	87%	1%	79%	3%	↓
European Union	84%	2%	73%	3%	↓
Other European countries	58%	2%	50%	3%	↓
Asia (including Australia and New Zealand)	62%	2%	58%	3%	↓
North America	58%	2%	53%	3%	↓
Middle East	51%	2%	49%	3%	-
Africa	38%	2%	42%	3%	↑
Latin America and the Caribbean	30%	2%	27%	3%	-

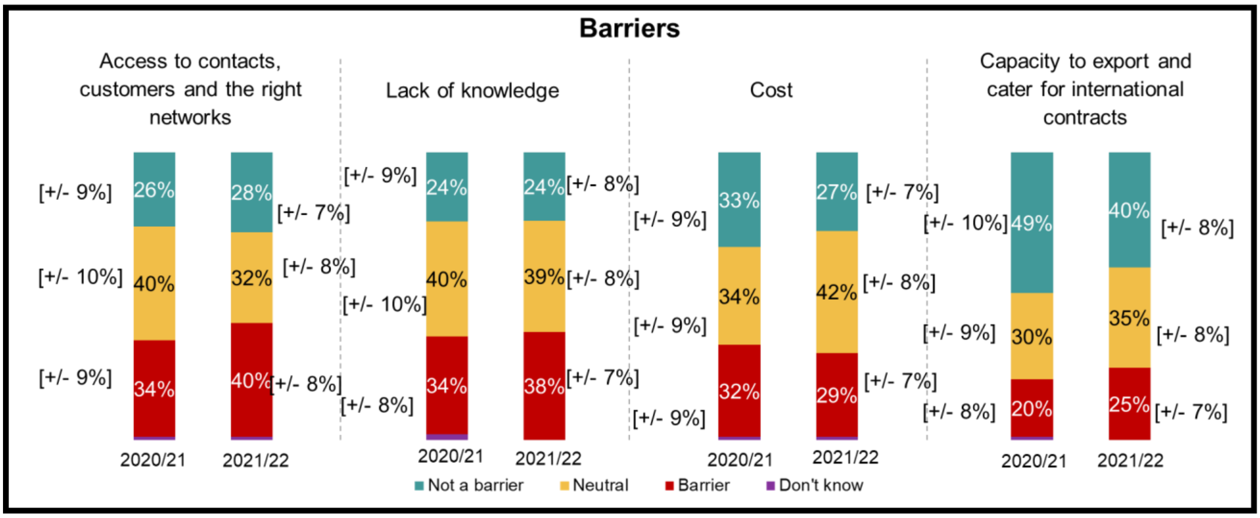
↑↓ Significant change from 2020/21 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Webinars and who have exported (n=914).

Summary: Export and Investment Teams







3.5. Export and Investment Teams

Export and Investment Teams work to maximise the supply of export-ready UK companies. They work directly with industry and international networks, to facilitate collaboration between UK businesses, co-ordinate government-to-government engagement, and support trade missions.

This chapter explores satisfaction with the Export and Investment Teams service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 166 businesses that used Export and Investment Teams between April 2021 and March 2022.

There were no statistically significant differences detected in the survey findings by different types of exporter, due to small base sizes.

Key changes since 2020/21:

The NPS for Export and Investment Teams was +12, which was a decrease from +30 in the previous year.

Almost seven in ten (68%) businesses were satisfied with Export and Investment Teams, a decrease from the previous year (74% in 2020/21). Meanwhile the proportion of businesses that were dissatisfied[36] increased from the previous year (9% compared to 7% in 2020/21).

Businesses were most positive about staff knowledge (80%) followed jointly by the clarity of steps they needed to take when using the service and quality of contacts they were provided with (66% each).

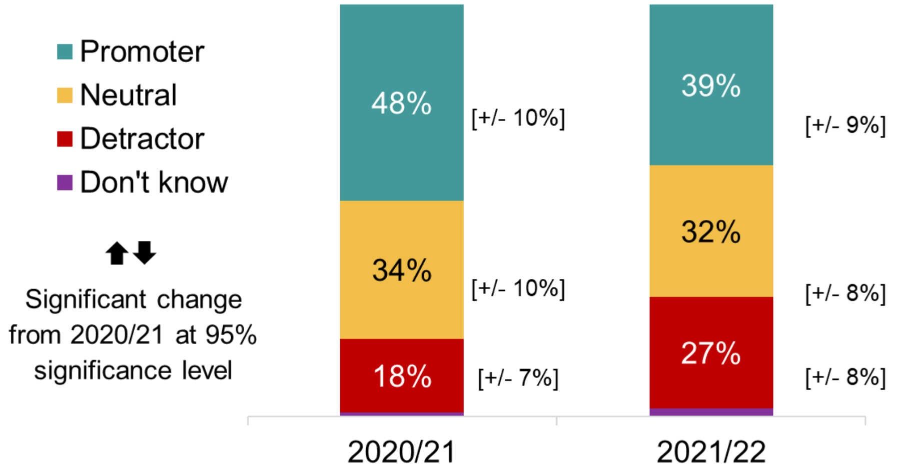
3.5.1. Satisfaction with the Export and Investment Teams service

3.5.1.1 Service performance

Businesses were broadly positive about the Export and Investment Teams service, and many said they would recommend it to colleagues and business associates. Almost four in ten (39%) were 'Promoters', i.e. likely to recommend the service, and more than a quarter (27%) were 'Detractors', i.e. unlikely to recommend the service[37]. These findings were in line with the previous year.

[36] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.
[37] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

Chart 3.5.1 Likelihood of recommending service (NPS) – Export and Investment Teams



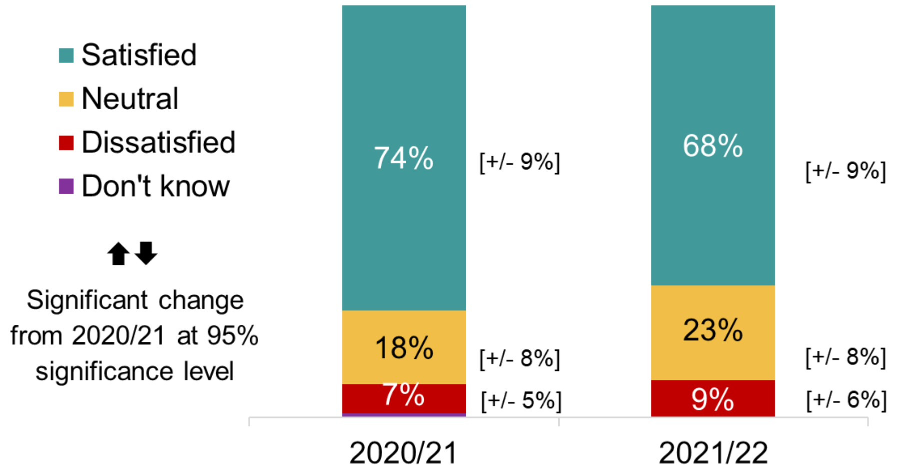
Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Export and Investment Teams (n=166).

Businesses felt that the service **could be improved** by having support that was more sector or industry specific (22%), better follow up (14%) and more communication or information (13%). More than a quarter (27%) could not think of any ways in which the service could be improved.

3.5.1.2 Satisfaction

Almost seven in ten (68%) businesses were satisfied with Export and Investment Teams, a decrease from the previous year (74% in 2020/21). Meanwhile the proportion of businesses that were dissatisfied[38] increased from the previous year (9% compared to 7% in 2020/21).

Chart 3.5.2 Satisfaction with service - Export and Investment Teams



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Export and Investment Teams (excluding 'not applicable' responses) (n=155).

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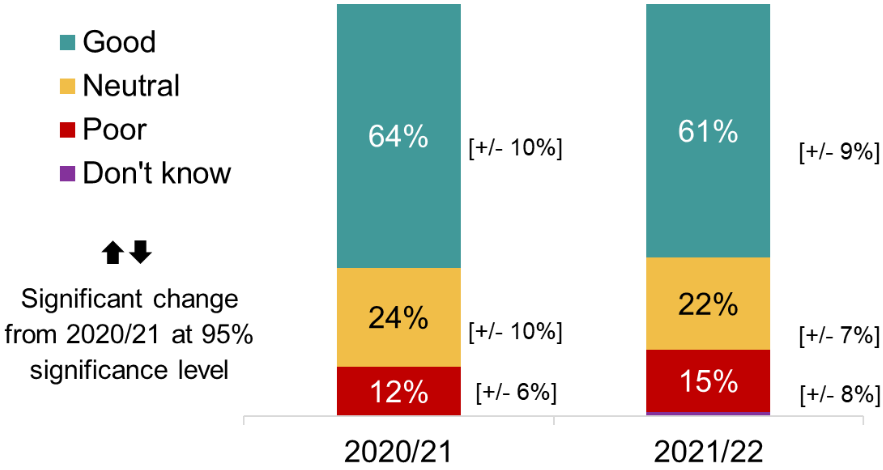
[38] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

Of the 22 business that were dissatisfied with the service (i.e. they rated the service as poor), 14 reported that their **reason for dissatisfaction** was because the service did not give them enough information or advice and nine reported they did not have enough contact with DIT staff.

3.5.1.3 Whether overall service met needs

The majority of businesses said that the overall service provided by Export and Investment Teams had met their needs; 61% rated it as good, while 15% rated it as poor[39]. Businesses that rated the service as good regarding the service meeting its needs decreased from the previous year while businesses that rated the service as poor increased.

Chart 3.5.3 Rating of whether overall service met needs – Export and Investment Teams



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Export and Investment Teams (excluding 'not applicable' responses) (n=153).

Businesses were most positive about staff knowledge (80%) followed jointly by the clarity of steps they needed to take when using the service and quality of contacts they were provided with (66% each). On the other hand, businesses were most negative of the quality of contacts they were provided (18%) followed by how clear the steps they needed to take after using the service (14%). These findings were in line with the previous year.

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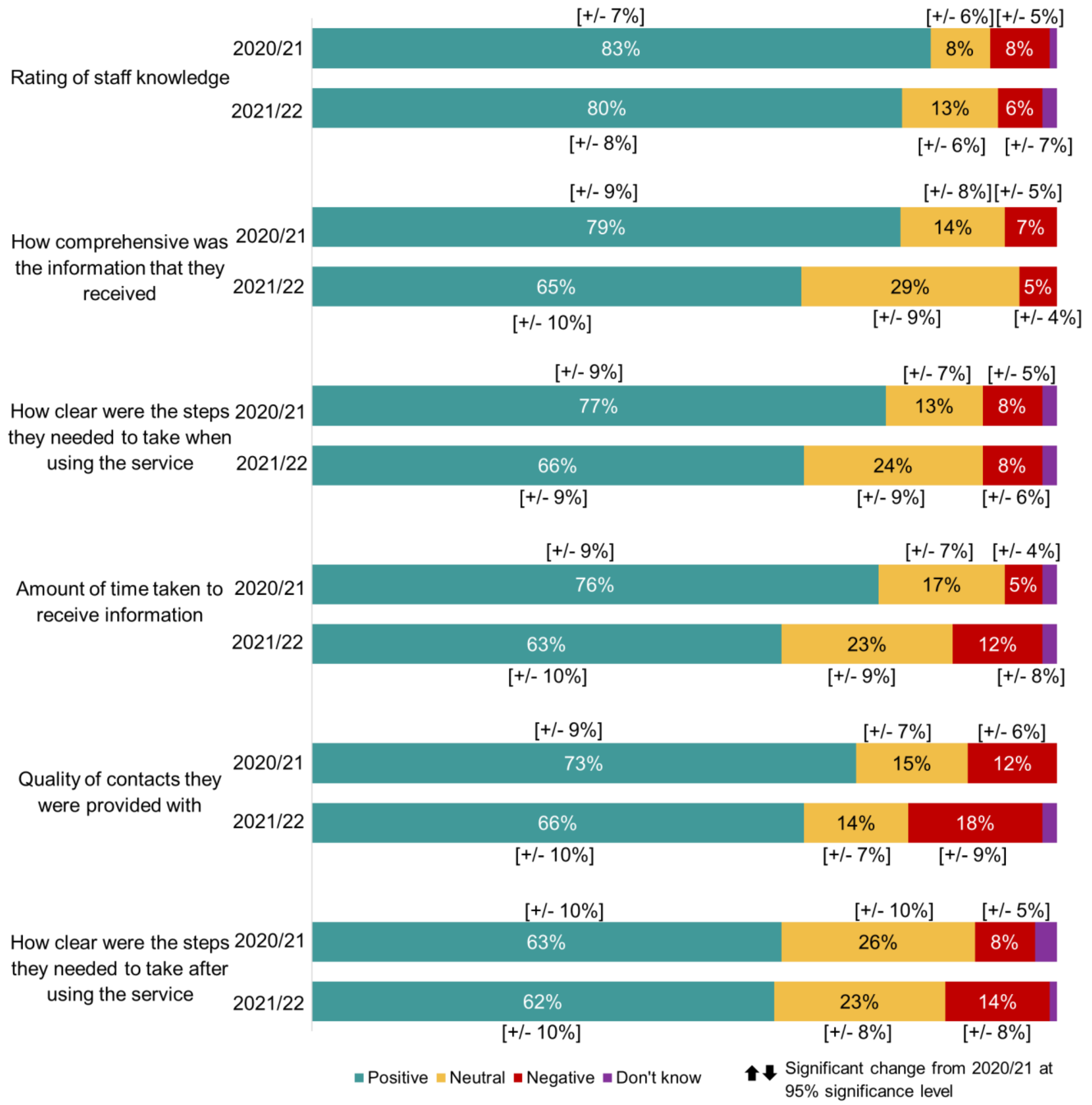
[39] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.

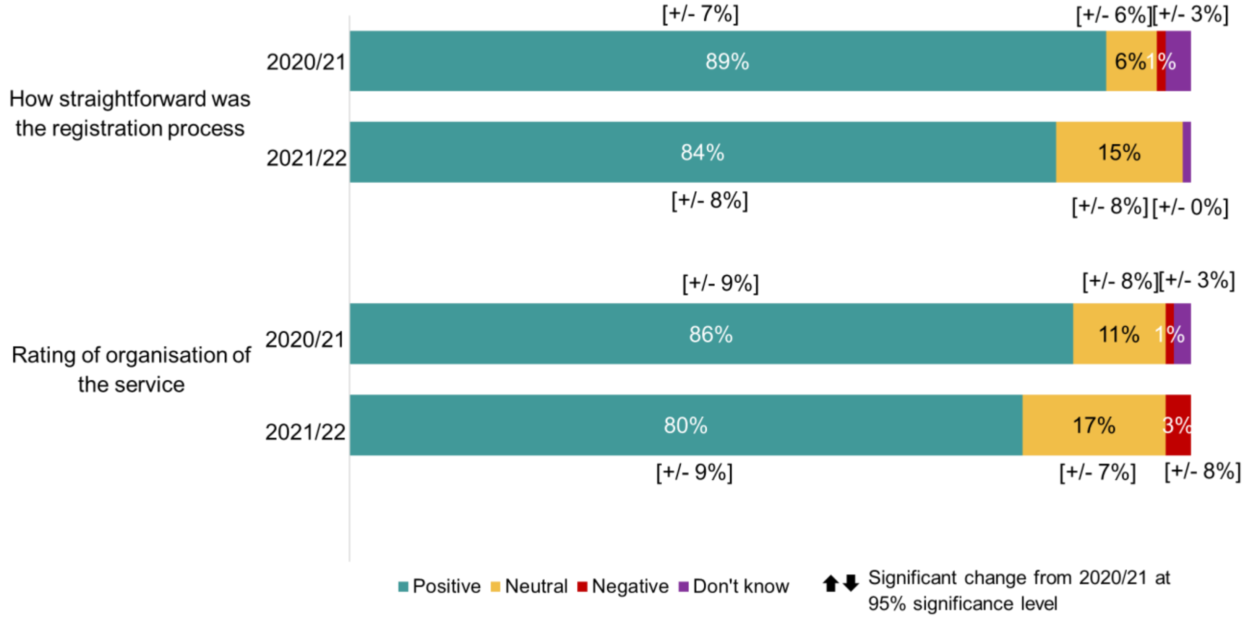
Chart 3.5.4 Rating by business of the specific advice and support they received – Export and Investment Teams



Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=148). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=134). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=141). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=144). Qclarity_2 – The service made clear what I should do next after using it (n=134). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=133). Base: All respondents that used each service (excluding 'not applicable' responses).

More than eight in ten businesses were positive about how straightforward the registration process was (84%) and the organisation of the service (80%). These findings were in line with the previous year.

Chart 3.5.5 Rating by business of the registration process and organisation of the service – Export and Investment Teams



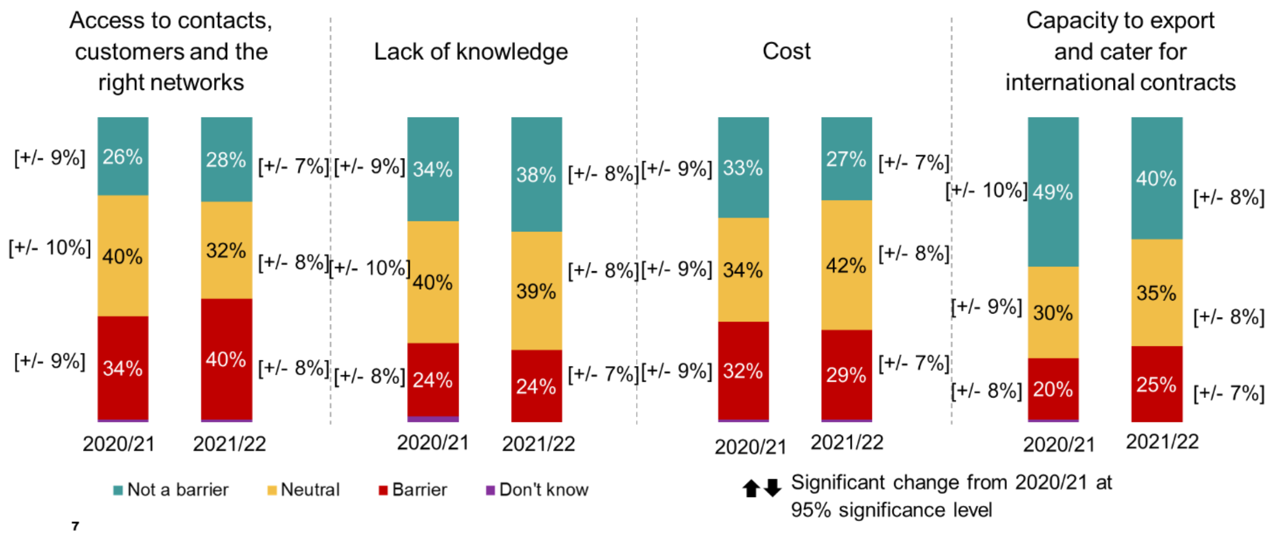
Qreg – How straightforward was the registration process for the service? Base: All respondents that used the service (excluding non-applicable responses) (n=138).
Qevent – How would you rate the organisation of the service? Base: All firms that dealt with Events, Missions or Tradeshows (excluding non-applicable responses) (n=143).

3.5.2. Outcomes of using the Export and Investment Teams service

3.5.2.1 Counteracting the barriers to exporting

Businesses that used Export and Investment Teams reported facing barriers to exporting[40]. Four in ten (40%) reported that access to contacts, customers and the right networks was a barrier. This was followed by cost (29%), capacity to export and cater for international contracts (25%) and lack of knowledge (24%). These findings were in line with the previous year.

Chart 3.5.6 Barriers to exporting – Export and Investment Teams

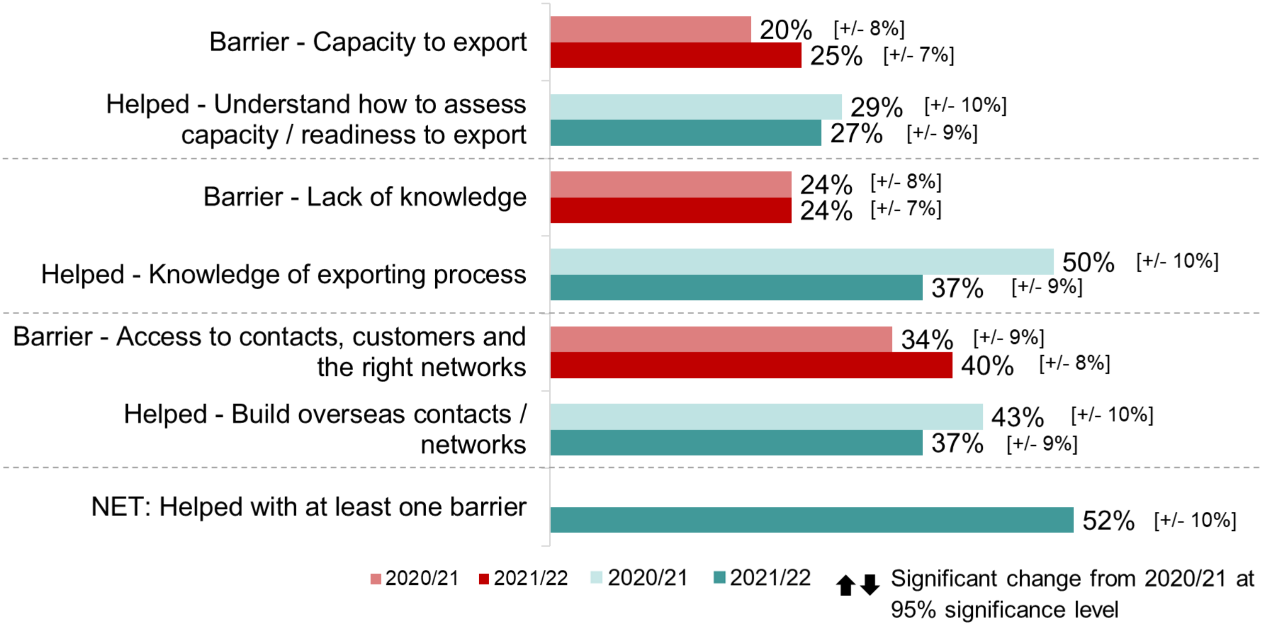


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export and Investment Teams (excluding 'not applicable' responses) (ranging from n=151 to n=154).

Businesses were asked whether using Export and Investment Teams (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Almost four in ten (37%) businesses reported that Export and Investment Teams had helped them by increasing their knowledge of the exporting process and build their overseas contacts/networks (37%). This was followed by helping businesses understand how to assess their capacity or readiness to export (27%).

[40] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB).

Chart 3.5.7 Barriers to exporting and how DIT helped – Export and Investment Teams

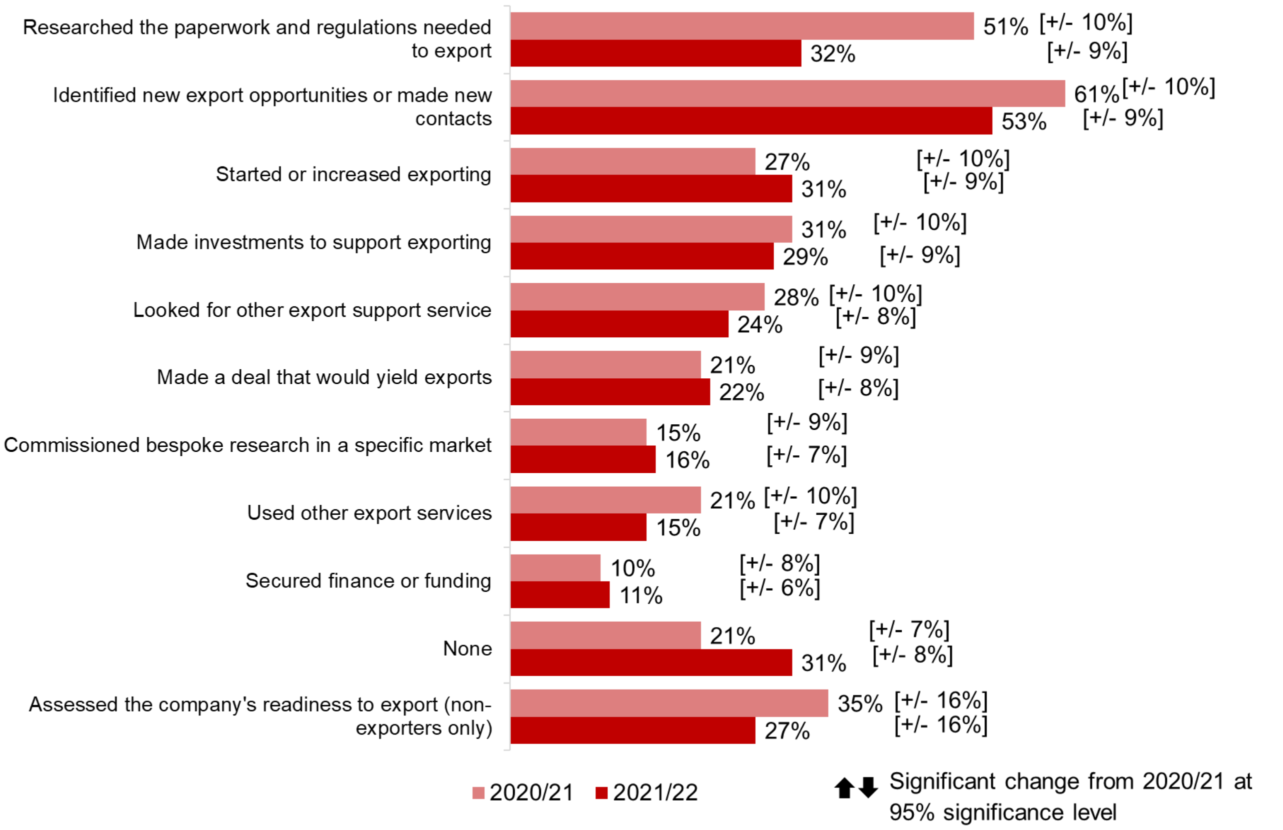


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export and Investment Teams (excluding 'not applicable' responses) (n=151 to n=154).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … Increase your knowledge of export opportunities available / build overseas contacts and networks? Base: All respondents who used Export and Investment Teams (n=166).

3.5.2.2 Taking action

Businesses had taken a range of actions as a result of using Export and Investment Teams. More than a third (35%) of businesses that were not exporting at the time of using the service had assessed the business' readiness to export. More than half (53%) of businesses reported that they had identified new opportunities or made new contacts, followed by researching the paperwork and regulations needed to export (32%), and then starting or increasing exporting (31%).

Chart 3.5.8 Actions taken as a result of service interaction - Export and Investment Teams



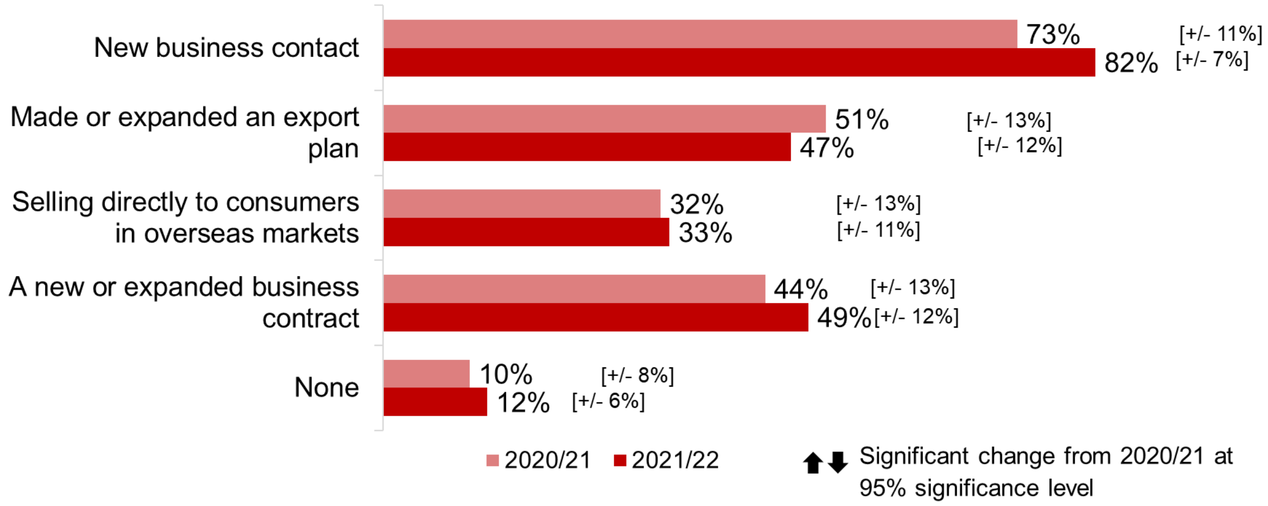
Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Export and Investment Teams (n=166).

3.5.2.3 Identifying new opportunities

As a result of using Export and Investment Teams, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (82%), followed by a new or expanded business contract (49%), made or expanded an export plan (47%) and selling directly to consumers in overseas markets (33%). These findings were in line with the previous year.

Among businesses that had identified a new business contact as part of the DIT service, almost half (47%) had contacted a distributor, while more than half had contacted a buyer (54%).

Chart 3.5.9 Identifying new opportunities - Export and Investment Teams

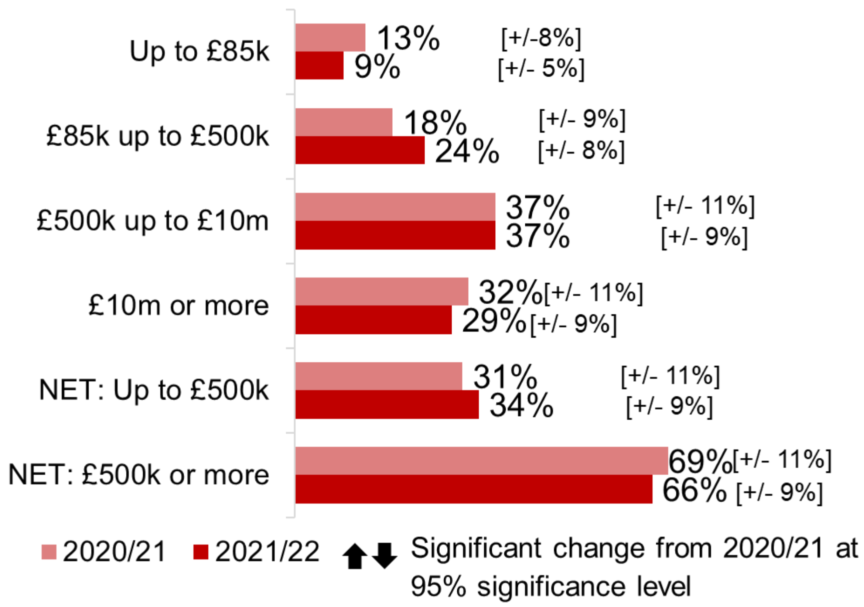


Q081_Qresult_opps - Which of the following opportunities, if any, has your business identified? Base: All firms that identified or were provided with new business contacts or new export opportunities (n=103)

3.5.3. Service use by firmographics and export behaviour

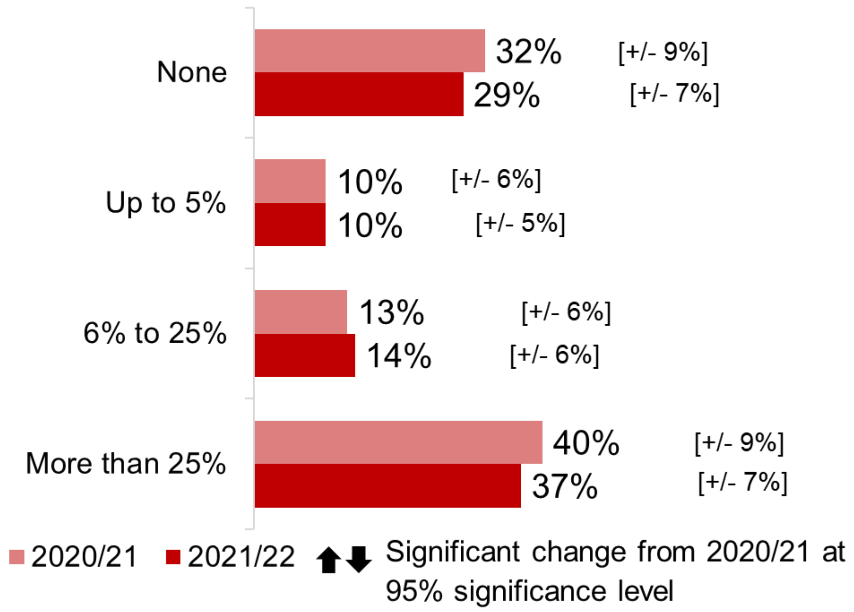
Two-thirds of businesses that used Export and Investment Teams had a high turnover of £500,000 or more (66%). Meanwhile, a third had lower turnovers (34%) of up to £500,000. Almost four in ten businesses (37%) reported that the proportion of their turnover from exporting was more than 25%.

Chart 3.5.10 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used Export and Investment Teams (excluding Don't know/Refused) (n=110).

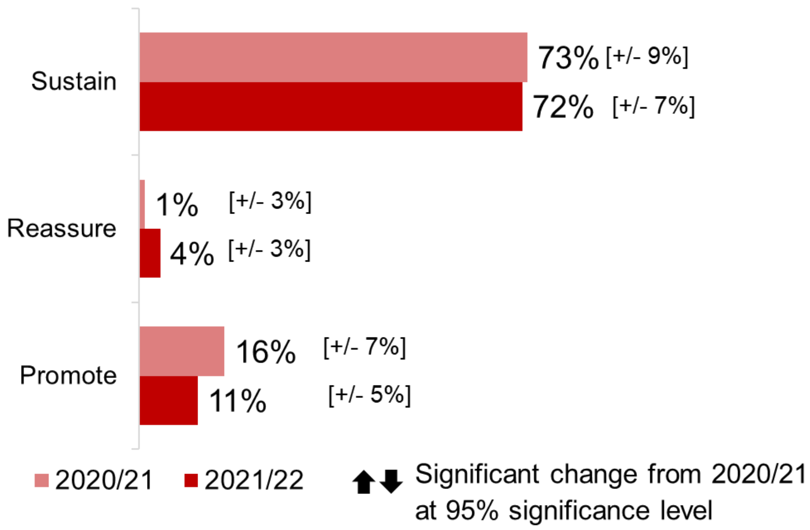
Chart 3.5.11 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All firms that used Export and Investment Teams (n=166).

Current exporters made up the majority of businesses using the Export and Investment Teams service. Seven in ten businesses (72%) were currently exporting ('Sustain') and 11% had never exported before ('Promote').[41] These findings were in line with the previous year.

Chart 3.5.12 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Export and Investment Teams (n=166).

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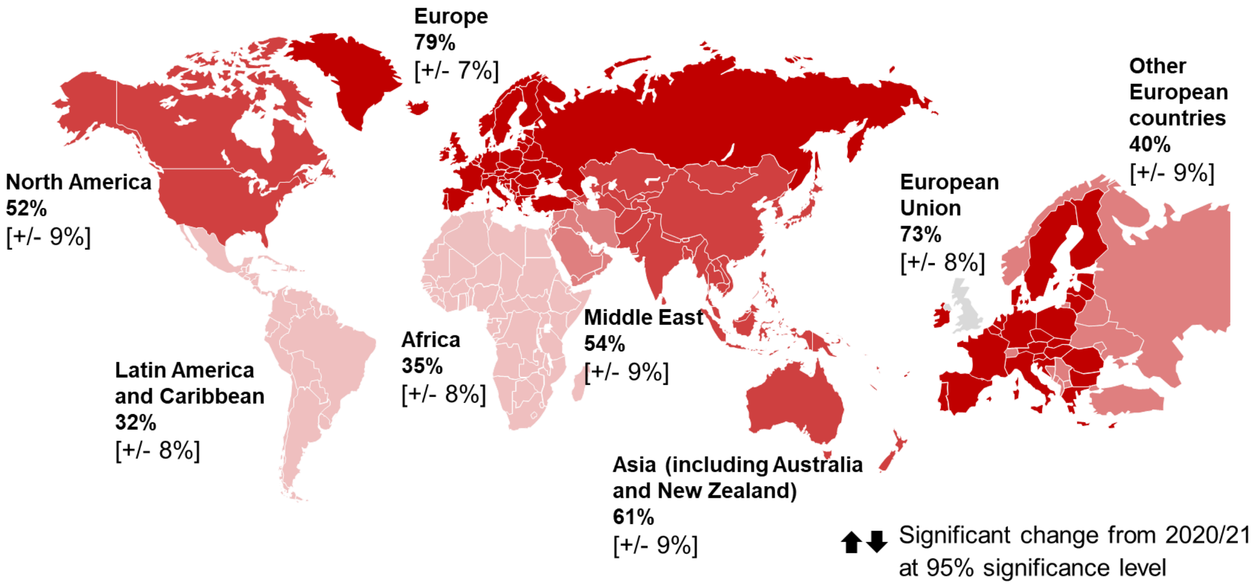
[41] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

Europe remained the most common export market among Export and Investment Teams businesses. Among those who were currently exporting or had done so previously, more than seven in ten (73%) exported to the European Union, followed by Asia (61%), the Middle East (54%), North America (52%) and non-EU European countries (40%). These findings were in line with the previous year.

Chart 3.5.13 Regions organisations export to or exported to previously – Export and Investment Teams



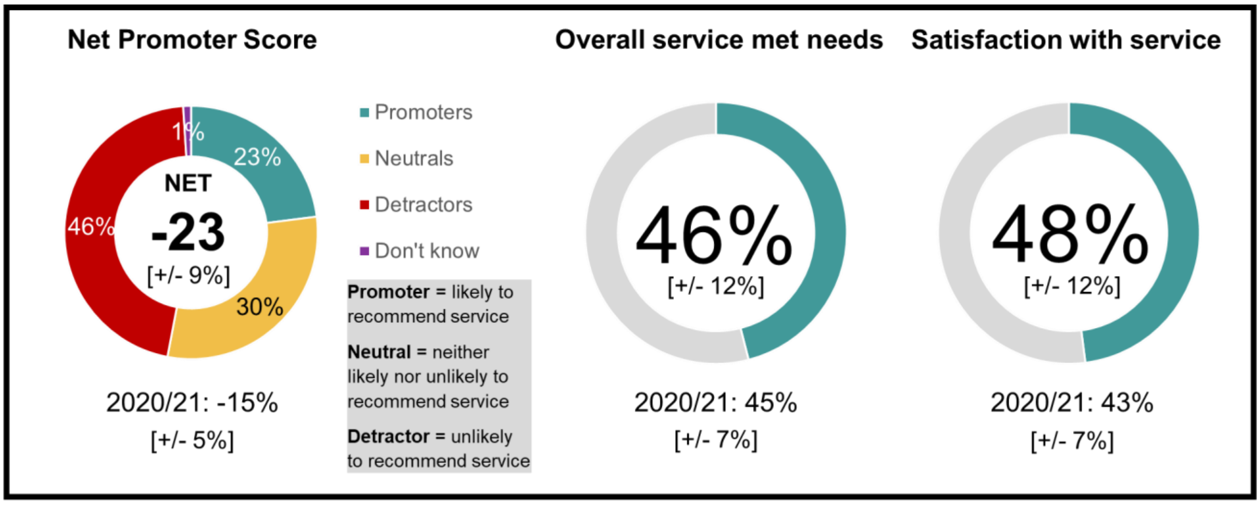
Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All firms exporting at the time of dealing with the service or at any time previously (n=127).

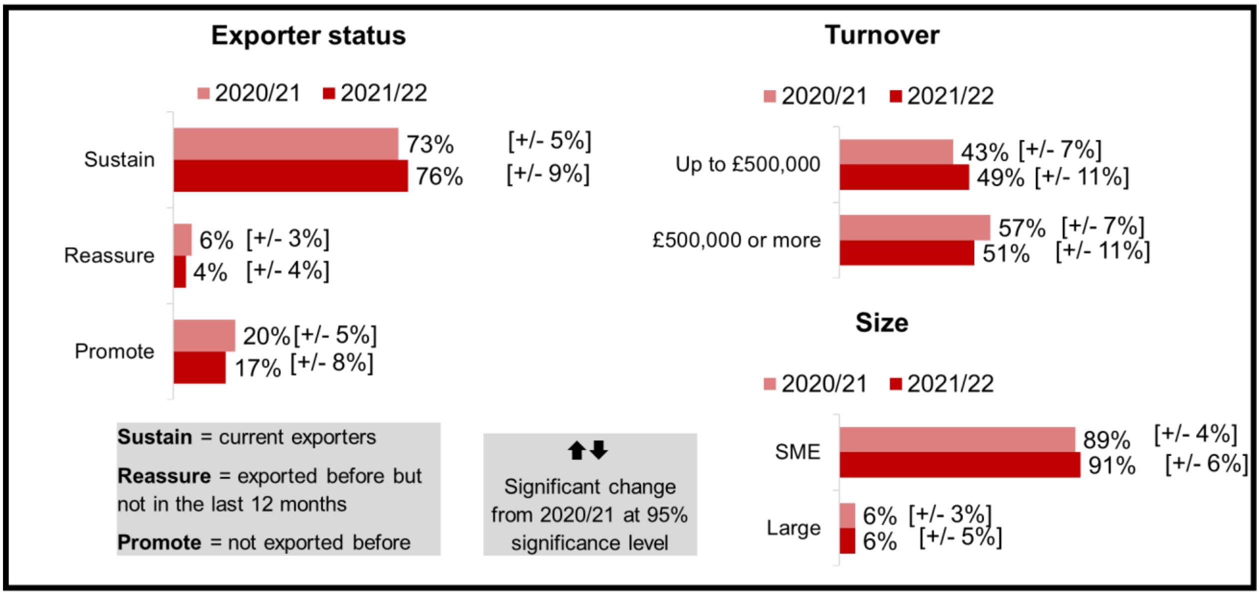
Table 3.5.1 Regions organisations export to or exported to previously – Export and Investment Teams

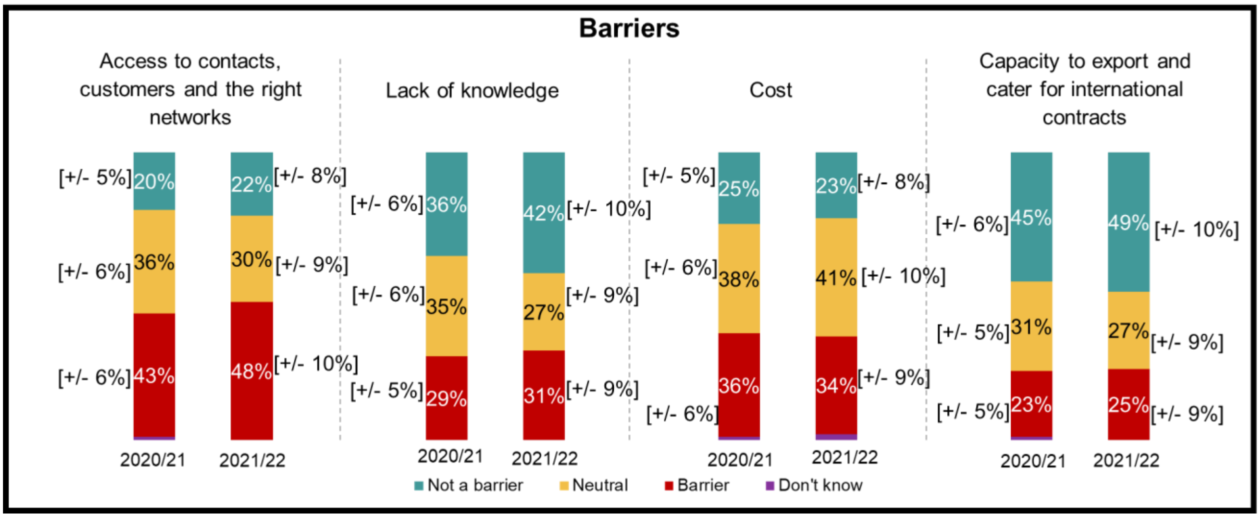
	2020/21	CI (+/-)	2021/22	CI (+/-)	Change
Europe	82%	9%	72%	7%	-
European Union	78%	9%	73%	8%	-
Other European countries	55%	11%	40%	9%	-
Asia (including Australia and New Zealand)	62%	11%	61%	9%	-
Middle East	59%	11%	54%	9%	-
North America	57%	11%	52%	9%	-
Africa	39%	11%	35%	8%	-
Latin America and Caribbean	33%	10%	32%	8%	-

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Export and Investment Teams and who have exported (n=127).

Summary: Export Opportunities







3.6. Export Opportunities

Export Opportunities is an online service on great.gov.uk which promotes global exporting opportunities to UK companies. Most opportunities are fetched from third party feeds via an automated process, with a small number being manually sourced and uploaded by DIT's overseas posts. Customers who are interested in third-party opportunities are directed to the source site of the opportunity for any further steps, so do not have any direct interaction with DIT staff. Customers interested in manually sourced opportunities are asked to complete a short application form, which is sent to the responsible post to action. The Quality Survey only includes respondents that who expressed an interest in DIT-sourced opportunities.

This chapter explores satisfaction with the Export Opportunities service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 102 businesses that used Export Opportunities between April 2021 and March 2022.

Key changes since 2020/21:

The NPS for Export Opportunities was -23, which was in line with -15 in the previous year.

The proportion of respondents who that felt the service overall met their needs (46%) was in line with 2020/21 (45%). However, more respondents said that the service did not need their needs (32%) than in the previous year (26% in 2020/21). Satisfaction with the Export Opportunities service remained in line with the previous year. Around half of respondents (48%) said they were satisfied with their experience, while three in ten (28%) said they were dissatisfied.

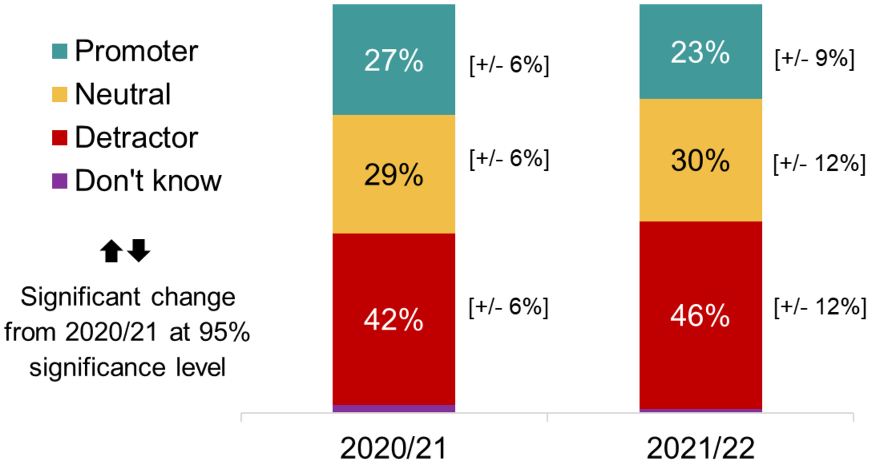
3.6.1. Satisfaction with the Webinars service

3.6.1.1 Service performance

Twice as many businesses were negative about the Export Opportunities service, than were positive when asked if they were likely to recommend it to colleagues and business associates. Around a quarter (23%) were 'Promoters', i.e. likely to recommend the service, while around half (46%) were 'Detractors', i.e. unlikely to recommend the service[42]. Both of these results were in line with findings from the previous year (27% and 42% respectively in 2020/21).

[42] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

Chart 3.6.1 Likelihood of recommending service (NPS) – Export Opportunities



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Export Opportunities (n=102).

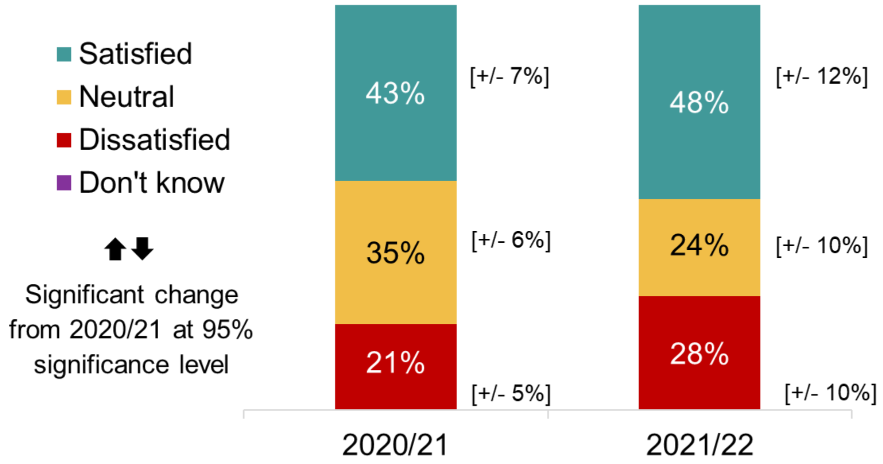
Seven in ten businesses who had used the service (69%) suggested various ways in which they felt the service **could be improved.** Among these, the main areas for possible improvement related to the provision of information: around a quarter suggested that more communication or information would improve the service (28%), as would providing better quality information. A similar proportion (24%) also felt that information could be made more specific to their sector or industry. Over one in ten suggested the service could provide better follow up (17%), increased networking opportunities (14%), an improved website or portal (10%), or increased provision such as resources or funding (10%). Around a quarter of businesses (27%) could not think of ways in which the service could be improved, in line with the previous year (24%).

3.6.1.2 Satisfaction

Satisfaction with Export Opportunities remained in line with the previous year. Around half of respondents (48%) said they were satisfied with their experience, while three in ten (28%) said they were dissatisfied[43].

[43] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

Chart 3.6.2 Satisfaction with service - Export Opportunities



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Export Opportunities (excluding 'not applicable' responses) (n=100).

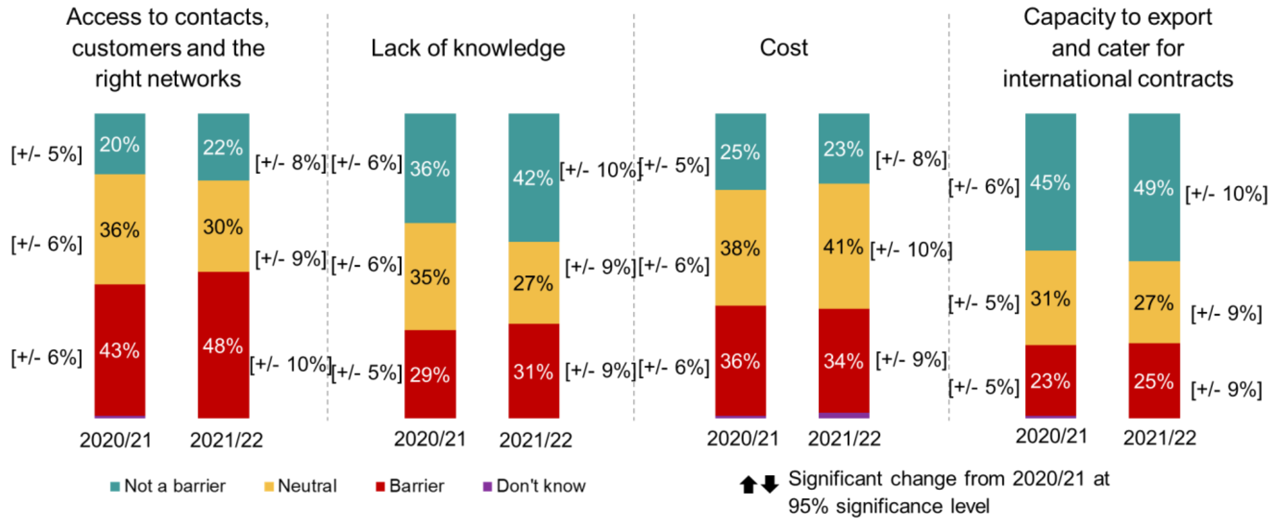
Of the 31 businesses that were dissatisfied with the service (i.e. they rated the service as poor), 18 reported that their **reason for dissatisfaction** was that the service did not give them enough information or advice. Eleven of these businesses felt that the service did not do anything for them or did not help them, and ten did not think that DIT had had enough contact with them.

3.6.2. Outcomes of using the Export Opportunities service

3.6.2.1 Counteracting the barriers to exporting

Businesses that used the Export Opportunities service reported facing barriers to exporting[44]. Around four in ten (43%) reported access to networks was a barrier, meaning this was again the barrier they most commonly encountered, while around a third said that cost (34%) or lack of knowledge (31%) was a barrier. Respondents were less likely to see their capacity to export (23%) as a barrier. These findings were in line with the previous year.

Chart 3.6.2 Barriers to exporting – Export Opportunities

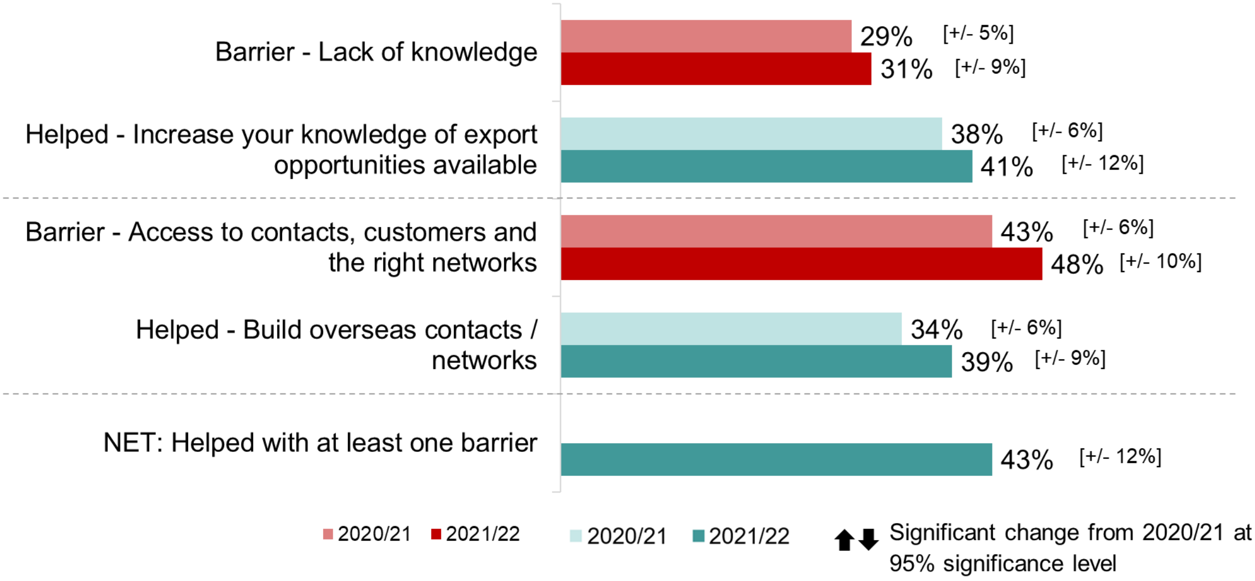


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export Opportunities (excluding 'not applicable' responses) (ranging from n=99 to n=100).

Businesses were asked whether using Export Opportunities (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Around four in ten businesses (41%) reported that using Export Opportunities had helped to increase their knowledge of export opportunities. A similar proportion thought that the service was helpful in overcoming the barrier of accessing the right customers; 39% said that it had helped them to build overseas contacts or networks. These findings were in line with the previous year.

[44] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

Chart 3.6.3 Barriers to exporting and how DIT helped – Export Opportunities



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 (excluding 'not applicable' responses) (ranging from n=99 to n=100).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks. Base: All respondents who used Export Opportunities (n=102).

3.6.2.2 Taking action

Businesses had taken a range of actions as a result of using Export Opportunities. Around half (52%) said they had identified new export opportunities or made new contacts, which was by far the most commonly reported action. Over a quarter (27%) had researched the paperwork and regulations needed to export and one in five (21%) had looked for other export support services. The proportion of businesses saying they had researched the paperwork and regulations needed to export had decreased, from 48% in 2020/21 to 27% in 2021/22.

Of the 30 businesses that were not exporting at the time of using the service[45], 14 had assessed the business' readiness to export.

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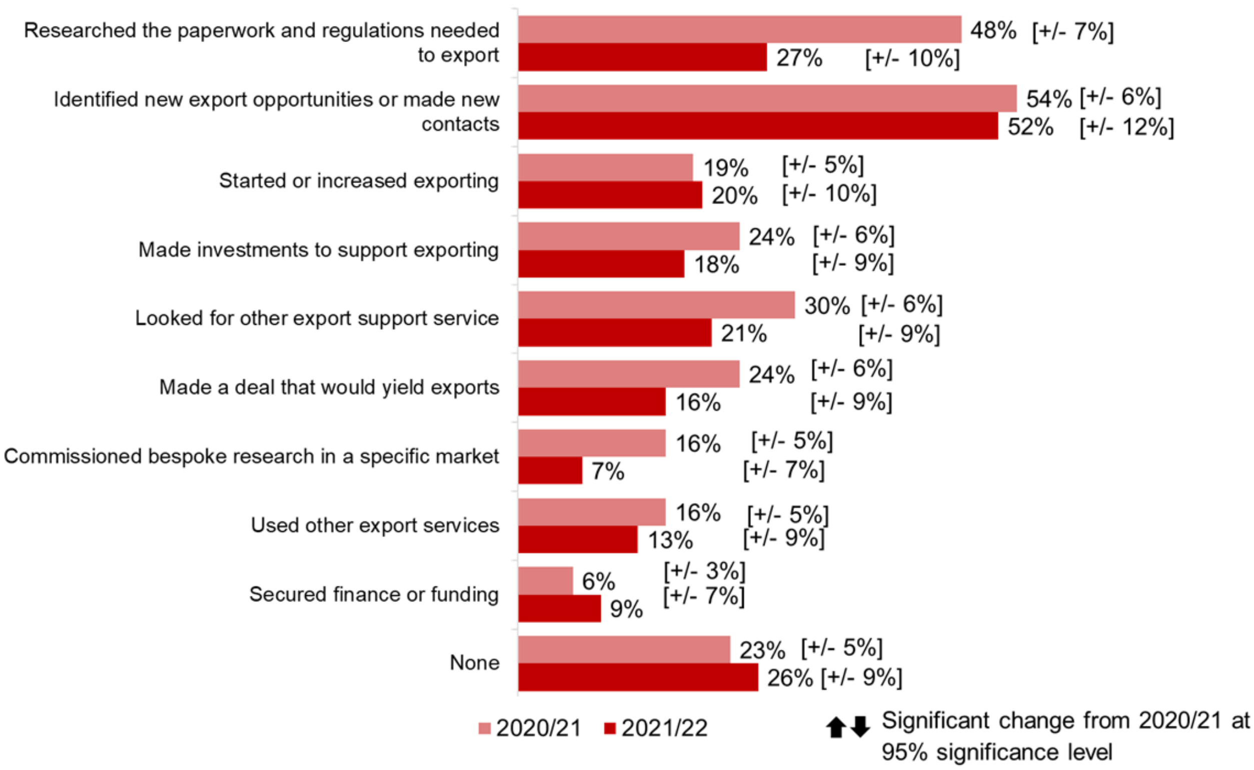
[45] As this question has a very low base size, results should be treated with caution.

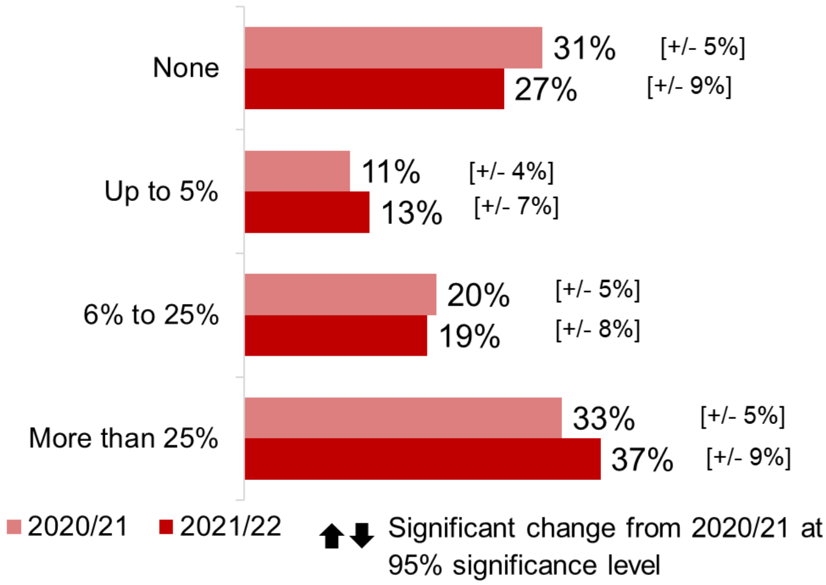
Chart 3.6.4 Actions taken as a result of service interaction - Export Opportunities



Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Export Opportunities (n=102).

3.6.3. Service use by firmographics and export behaviour

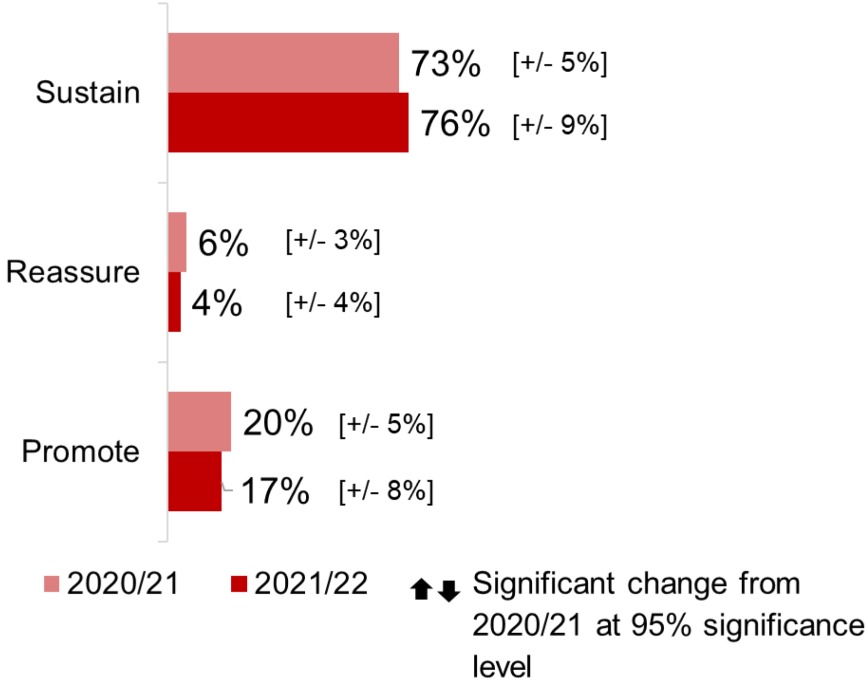
Chart 3.6.5 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Export Opportunities (n=102).

As was the case in the previous year, most businesses using the Export Opportunities service were current exporters. Three quarters of businesses (76%) were currently exporting ('Sustain'), compared with one in six (17%) that had never exported before ('Promote'). Only four percent had exported before but not in the past 12 months ('Reassure') [46].

Chart 3.6.6 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Export Opportunities (n=102).

[46] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

4. Awareness and use of services

The survey also examined how businesses came to use DIT services; specifically, when they first used the service or product and how they first heard about DIT. It also assessed recall of whether the business had seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting.

4.1. When businesses first used the DIT service

The proportion of businesses that were using a DIT (or UKTI) service for the first time was higher than the previous year for the majority of DIT services.

Key changes since 2020/21:

- An increase in the proportion of Export and Investment Teams businesses that were using a DIT (or UKTI) service for the first time (21%, up from 9% in 2020/21).
- An increase in the proportion of ITA businesses that were using a DIT (or UKTI) service for the first time (21%, up from 16% in 2020/21).
- An increase in the proportion of Posts businesses that were using a DIT (or UKTI) service for the first time (19%, up from 11% in 2020/21), and a decrease in the proportion that had used a DIT service 2-5 years ago (17%, down from 22% in 2020/21).
- An increase in the proportion of Webinars businesses that were using a DIT (or UKTI) service for the first time (17%, up from 13% in 2020/21), within the last six months (8%, up from 5% in 2020/21) and 2-5 years ago (20%, up from 17% in 2020/21). There was also a decrease in the proportion that had using a DIT service more than 5 years ago (33%, down from 38% in 2020/21).
- A decrease in the proportion of Export Opportunities businesses that were using a DIT (or UKTI) service 6-12 months ago (4%, down from 16% in 2020/21).

Table 4.1.1 When businesses first started using a DIT service, by product or service

Non-Digital Service	E&I Teams 20/21	E&I Teams 21/22	Significant Change	ITAs 20/21	ITAs 20/21	Significant Change
This was the first time	9%	21%	↑	16%	21%	↑
Within the last 6 months	2%	6%	-	9%	10%	-
6-12 months ago	10%	5%	-	10%	8%	-
1-2 years ago	11%	10%	-	10%	8%	-
2-5 years ago	23%	15%	-	18%	17%	-
More than 5 years ago	37%	31%	-	32%	31%	-
Don't know	8%	12%	-	5%	5%	-
Unweighted base	113	166	-	1,526	1,479	-

Non-Digital Service	Posts 20/21	Posts 21/22	Significant Change
This was the first time	11%	19%	↑
Within the last 6 months	7%	7%	-
6-12 months ago	10%	8%	-
1-2 years ago	12%	10%	-
2-5 years ago	22%	17%	↓
More than 5 years ago	31%	32%	-
Don't know	7%	6%	-
Unweighted base	622	685	-

Digital Service	Webinars 20/21	Webinars 21/22	Significant Change	Export Opportunities 20/21	Export Opportunities 21/22	Significant Change
This was the first time	13%	17%	↑	16%	21%	-
Within the last 6 months	5%	8%	↑	4%	5%	-
6-12 months ago	9%	9%	-	16%	4%	↓
1-2 years ago	9%	7%	-	14%	7%	-
2-5 years ago	17%	20%	↑	20%	26%	-
More than 5 years ago	38%	33%	↓	23%	32%	-
Don't know	9%	6%	↓	6%	5%	-
Unweighted base	2,378	1,155	-	304	102	-

Digital Service	Export Academy 21/22
This was the first time	39%
Within the last 6 months	13%
6-12 months ago	6%
1-2 years ago	6%
2-5 years ago	10%
More than 5 years ago	22%
Don't know	5%
Unweighted base	654

QfirstDIT – When did you first start using a DIT (or its predecessor, UKTI) service? Base: All respondents.

4.2. How businesses first heard about DIT

For most services or products, the most frequent way of finding out about DIT was through contacts in the private sector, with the highest proportion being among businesses using the Export and Investment Teams service (25%) and ITAs (24%).

Key changes since 2020/21:

- An increase in the proportion of Export and Investment Teams businesses that first heard about DIT through contacts in the public sector (22%, up from 9% in 2020/21).
- An increase in the proportion of ITA businesses that first heard about DIT through contacts in the private sector (24%, up from 21% in 2020/21) and public sector (14%, up from 9% in 2020/21), and a decrease in the proportion that first heard about DIT through a UK trade fair (2%, down from 4% in 2020/21).
- An increase in the proportion of Posts businesses that first heard about DIT through contacts in the public sector (18%, up from 12% in 2020/21).
- An increase in the proportion of Webinars businesses that first heard about DIT through contacts in the public sector (18%, up from 10% in 2020/21) and through articles or information that had been seen or read (3%, up from 2% in 2020/21).
- An increase in the proportion of Export Opportunities businesses that first heard about DIT through contacts in the public sector (24%, up from 7% in 2020/21).

Table 4.2.1 How businesses first heard about DIT, by product or service

Non-Digital Service	E&I Teams 20/21	E&I Teams 21/22	Significant Change	ITAs 20/21	ITAs 21/22	Significant Change
Contacts in the private sector	19%	25%	-	21%	24%	↑
Contacts in the public sector	9%	22%	↑	9%	14%	↑
Articles / information seen or read	3%	1%	-	1%	2%	-
Exporting is GREAT advertising campaign	2%	-	-	1%	1%	-
great.gov.uk website	3%	1%	-	2%	3%	-
Searched online	4%	4%	-	10%	9%	-
Direct call from an ITA	4%	1%	-	5%	5%	-
Exporting is GREAT truck	-	-	-	*	*	-
UK trade fair	8%	5%	-	4%	2%	↓
Overseas trade fair	1%	1%	-	1%	1%	-
Unweighted base	113	166	-	1,526	1,479	-

Non-Digital Service	Posts 20/21	Posts 21/22	Significant Change
Contacts in the private sector	23%	20%	-
Contacts in the public sector	12%	18%	↑
Articles / information seen or read	1%	2%	-
Exporting is GREAT advertising campaign	1%	1%	-
great.gov.uk website	2%	2%	-
Searched online	9%	8%	-
Direct call from an ITA	3%	3%	-
Exporting is GREAT truck	-	-	-
UK trade fair	3%	2%	-
Overseas trade fair	2%	1%	-
Unweighted base	622	685	-

Digital Service	Webinars 20/21	Webinars 21/22	Significant Change	Export Opportunities 20/21	Export Opportunities 21/22	Significant Change
Contacts in the private sector	21%	24%	-	17%	19%	-
Contacts in the public sector	10%	18%	↑	7%	24%	↑
Articles / information seen or read	2%	3%	↑	1%	2%	-
Exporting is GREAT advertising campaign	1%	1%	-	2%	2%	-
great.gov.uk website	3%	3%	-	4%	3%	-
Searched online	8%	8%	-	17%	15%	-
Direct call from an ITA	2%	3%	-	3%	2%	-
Exporting is GREAT truck	-	*	-	*	-	-
UK trade fair	3%	2%	-	5%	6%	-
Overseas trade fair	1%	1%	-	2%	-	-
Unweighted base	2,378	1,155	-	304	102	-

Digital Service	Export Academy 21/22
Contacts in the private sector	21%
Contacts in the public sector	13%
Articles / information seen or read	5%
Exporting is GREAT advertising campaign	1%
great.gov.uk website	3%
Searched online	13%
Direct call from an ITA	4%
Exporting is GREAT truck	*
UK trade fair	1%
Overseas trade fair	*
Unweighted base	654

QContDIT – How did you first hear about DIT (or its predecessor, UKTI)? Includes only questionnaire pre-codes. Base: All respondents. Note: an asterisk (*) denotes a value of less than 0.5%.

4.3. Awareness of advertising

The majority of businesses across all services or products said that they recalled seeing or hearing advertising, publicity or other types of information encouraging businesses to think about exporting. Webinars businesses were the most likely to say this (68%).

Table 4.3.1 Whether businesses had seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting (new question in 2021/22)

Non-Digital Service	E&I Teams 21/22	ITAs 21/22	Posts 21/22
Yes	57%	60%	62%
No	42%	38%	37%
Don't know	2%	2%	1%
Unweighted base	116	1,479	685

Digital Service	Webinars 21/22	Export Opportunities 21/22	Export Academy 21/22
Yes	68%	53%	62%
No	28%	42%	34%
Don't know	4%	4%	4%
Unweighted base	1,155	102	654

QDITADAWARE – In the last year or so, have you seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting? Base: All respondents.

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

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