



Department for
Business & Trade

Export client reported impact survey for businesses supported April 2019 to March 2020

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KANTAR

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

Kantar Public plays a leading role in understanding the changing social, political and business landscapes, and provides evidence and capability-building for governments and organisations to deliver better public policies and communications.

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1. Introduction

1.1. Background and objectives

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

The Export Strategy 2018¹ is based on:

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

The main aims of the Export Client Survey are:

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

Additionally, the ECS is also used to create a 'longitudinal pipeline' – a new central dataset capturing all recorded service deliveries.

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

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

¹ [Export Strategy 2018](#)

The findings in this report are based on interviewing businesses who used DIT services between April 2019 and March 2020 (2019/20). Throughout this report findings from businesses that used DIT services in 2019/20 are compared to findings from 2018/19.

Interviewing for this report was conducted between April 2020 and March 2021 (inclusive).

1.2. Report coverage

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

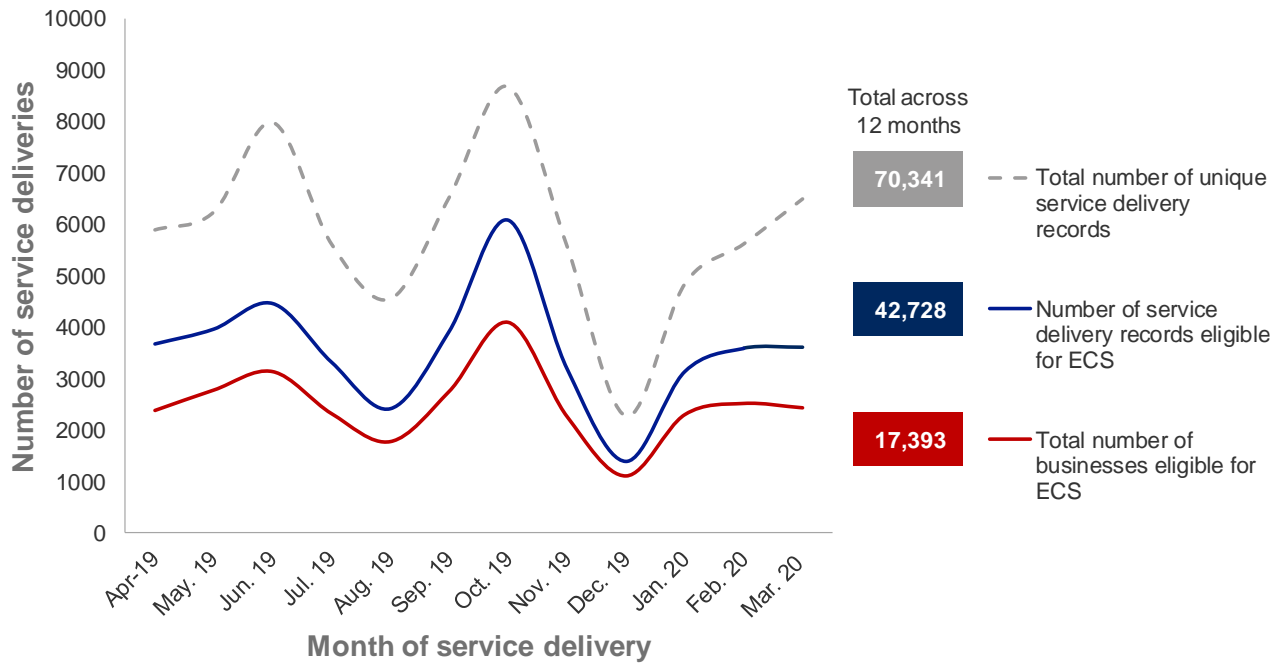
Table 1.2.1: Services covered in the survey

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

1.3. Overview of number of services delivered and businesses supported

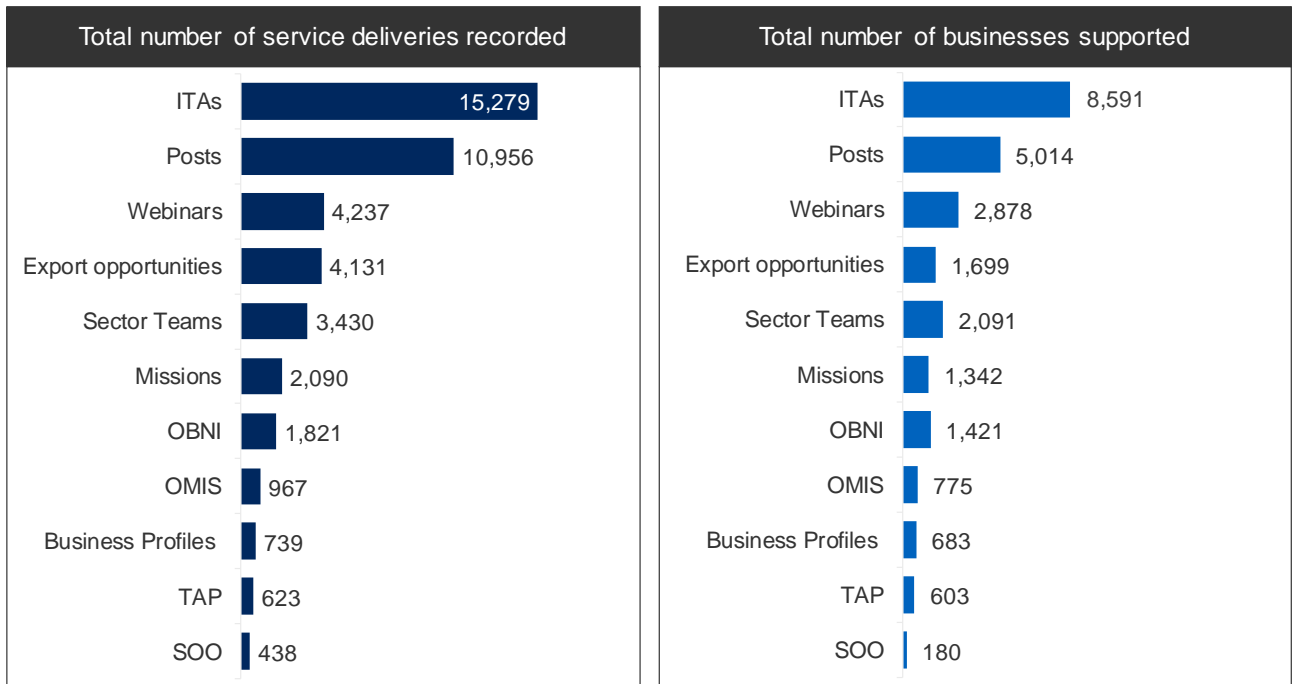
In total we received around 70,000 records, covering just under 43,000 service deliveries related to the services covered by the ECS for services delivered between April 2019 and March 2020. From these records, just over 17,000 individual businesses were supported through all the services covered by the ECS between this period. This includes the services that are not covered in depth in this report due to incomplete sample data being available from DIT. The lower number of services delivered (and businesses supported) in December is consistent with a seasonal trend of service deliveries seen in previous years.

Chart 1.3.1 Service delivery records received from DIT (April 2019 - March 2020)



The most frequently used services were ITAs (c.15,000 records across about 8,500 businesses) and Posts (c. 11,000 records across c. 5,000 businesses).

Chart 1.3.2 Service delivery records received from DIT (April 2019 - March 2020)



The services covered in this report are shown in Table 1.2.1. Some services (those where there were fewer than 100 completed interviews) have not been provided with a product findings chapter in this report due to low sample sizes that would lead to issues around the accuracy, high confidence intervals and confidentiality of results.

Table 1.3.1: Services covered in this report

Bespoke offers and face to face support
International Trade Advisers (ITAs)
Posts
Universal Offer Digital and Events
Webinars

2. Methodology

2.1. Sample Design

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

2.1.1. Quality Survey (QS)

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 accessing these export promotion services. The sample design and selection takes into account the *longitudinal* aspect of each business' access of 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 not take into account previous interactions with DIT however we are not able to fully control what wider experiences the business may draw on when responding.

There is a three-month break period between when a business accesses a DIT service and when the interview is conducted. Services delivered in April 2019 are included within the July 2019 sample, services delivered in May 2019 are included within the August 2019 sample etc. This is part of the survey design to ensure the service delivery was recent enough to be memorable.

2.1.2. Reported Impact Survey (RIS)

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

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

As the RIS is based on QS respondents who agreed to be re-contacted, the sample was checked to see if it was representative of businesses that participated in the Quality survey. Particular attention was given to see if there was a 'positivity' bias – if those who participated in the RIS were the businesses more likely to have reported that they were satisfied in their dealings with DIT (provided a rating of 7 or more out of 10 when asked in the Quality Survey question how satisfied they were with the service²). Table 2.1 compares the proportions of businesses that were satisfied in their dealings with the DIT product or service in the Quality Survey. The column for 'All Quality Survey respondents'

² The question asked was: Using the same scale as before, Thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service?
[IF NECESSARY]: Please rate the service on a scale of 0 to 10, where 10 is very satisfied and 0 is very dissatisfied.

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

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

DIT Product or Service ³	All QS respondents	All RIS respondents
	% satisfied	% satisfied
International Trade Advisers (ITAs)	77% [+/- 2%]	81% [+/- 3%]
Posts	76% [+/- 4%]	77% [+/- 6%]
Webinars	74% [+/- 5%]	81% [+/- 7%]

2.2. Analysis

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

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

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

Charts and tables in the report also display the Confidence Interval (CI) for each survey 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. When we get an estimate for a survey, we use 'Confidence Intervals' to account for the fact that we have interviewed this subset of the population. A 95% Confidence Interval is a margin of error around an estimate, which gives a range of values within which we can be 95% confident that the true number will be.

³ Table excludes Selling Online Overseas as only nine businesses were asked about this product or service following a low number of interviews in the Quality Survey.

In addition, charts and tables represent a statistically significant increase from 2018/19 RIS with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash. Some charts also look at statistically significant changes between the 2019/20 QS and the 2019/20 RIS. These are shown using triangle shaped arrows.

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.

Data in this report, including numbers of exporting contracts won and value of these contracts is based on estimates provided by the respondents. While steps are taken during interviewing to ensure that data is accurate (interviewers reading back all responses on number of contracts and value of contracts, respondents being offered the chance to provide a banded response rather than an exact numeric answer if they are unsure), caution should be taken as there is the potential for respondents to 'guess' at some answers where they do not know the precise figure.

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

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

2.2.1. Quality Survey (QS) weighting

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

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

We calculated weights at two levels:

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

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

2.2.2. Reported Impact Survey (RIS) weighting

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

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

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

2.3. Fieldwork

Interviews were conducted using Computer-Assisted Telephone Interviewing (CATI). All respondents were sent a letter and/or email, prior to being contacted, to let them know the purpose of the research and provide them with an opportunity to contact Kantar Public to ask any questions or opt out of the research. Fieldwork for this report began in April 2020 (interviewing businesses who received support from DIT in April 2019 and who participated in the Quality Survey in July 2019). This report covers DIT services delivered between April 2019 and March 2020. The average interview length was around 22 and a half minutes.

2.3.1. Impact of COVID-19 on fieldwork

Interviewing started during the first COVID-19 pandemic 'lockdown'. Before the survey started minor changes were made to the survey invite letter and questionnaire introduction to appreciate the challenges businesses were going through. Questions were added to the survey to explore the impact on businesses and their exporting behaviour.

2.4. Response rates

Table 2.2 below shows response rates achieved between April 2020 and March 2021. Table 2.3 breaks this down by DIT product or service. As noted in section 1.3, detailed analysis of several products or services has been excluded from this report as the base size was too low to report on with confidence. We calculated the overall response rate using the American Association for Public Opinion Research standard definitions⁴, an industry standard metric for calculating response rates. As there are no ineligible cases in the RIS fieldwork (as all businesses had completed the QS and agreed to be recontacted) it is easy to calculate response as:

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

We achieved a 50% response rate for interviews conducted between April 2020 and March 2021⁵.

⁴ [Link to the American Association for Public Opinion Research standard definitions](#)

⁵ Based on response rate 3 calculations, which can be found here: [Link to the American Association for Public Opinion Research standard definitions](#). Response rates are calculated by excluding deadwood.

Table 2.4.1 Fieldwork outcomes April 2019 to March 2020

Fieldwork outcomes	
	Number of cases (N)
<i>Number of cases issued</i>	3636
Live sample - not interviewed	1071
Deadwood (uncontactable phone numbers)	249
Refusal	636
Ineligible	0
Complete interview	1680
Response rate	50%

2.4.1. Response rates for each DIT service

Table 2.4.2 Fieldwork outcomes April 2020 to March 2021

	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector teams	Webinars	Export Opportunities	Business Profiles	Selling Online Overseas
Number of cases issued	135	1788	138	141	66	574	213	304	195	65	17
Live sample - no interview	48	521	41	46	13	172	63	85	58	19	5
Deadwood	6	102	13	8	5	53	22	24	13	2	1
Refusal	22	311	15	23	23	85	35	62	39	19	2
Complete	59	854	69	64	25	264	93	133	85	25	9
Response rate	46%	51%	55%	48%	41%	51%	49%	48%	47%	40%	56%

3. Product Findings

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

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

3.1. 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.

3.1.1. ITAs: Quality survey summary

These findings are based on interviews with 854 businesses who used the ITA service from April 2019 to March 2020 and participated in both the Quality Survey and Reported Impact Survey (RIS).

Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=2,402), as an overview of businesses' experience of using ITAs.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own⁶. More than half (54%) were 'Promoters' of ITAs (score of 9-10), while 17% were 'Detractors' (score of 0-6) and 28% were neutral (score of 7-8). **Overall, ITAs had an NPS of 37.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)⁷.

Overall, **three in four (77%) businesses were satisfied with their experience of ITAs** (rating of 7 or more out of 10), and this included around one in four businesses (27%) who gave a 'very satisfied' rating (10 out of 10). The figures for NPS and satisfaction with the service remain unchanged since 2018/19.

⁶ Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.

⁷ Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

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

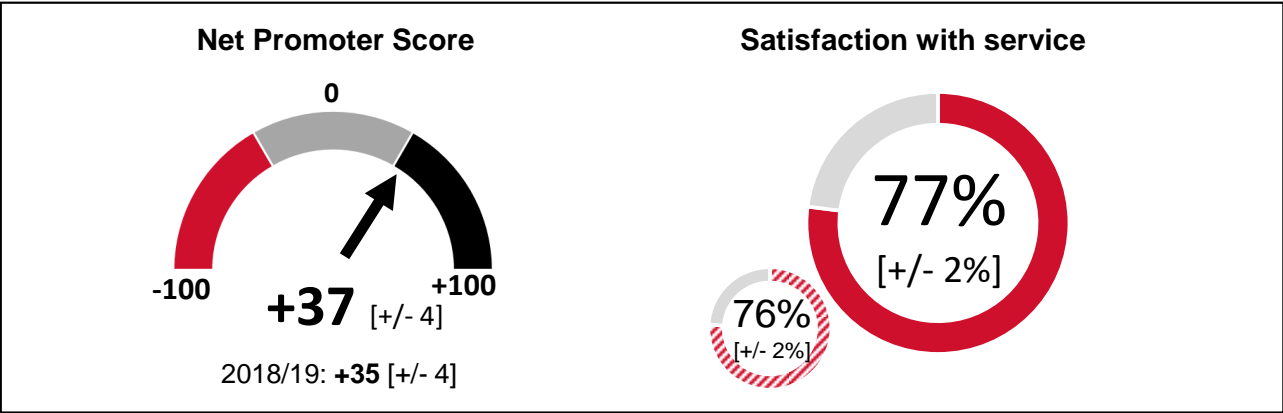


Chart 3.1.2 Key indicators from the RIS survey – ITAs

Summary page – ITAs

QS: Quality Survey
RIS: Reported Impact Survey

Export Status

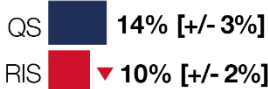
Sustain (current exporters)



Reassure
(exported before but not in last 12 months)

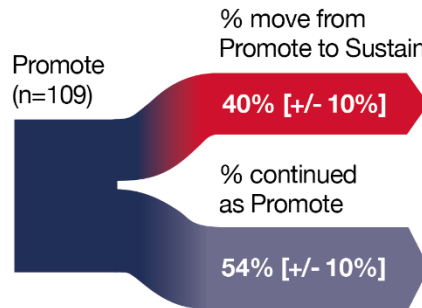


Promote (not exported before)



Base: All businesses using ITAs (n=854)

Segment movement from Promote



Quality Survey (QS)

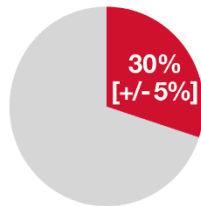
Reported Impact Survey (RIS)

Base: All businesses using ITAs that were in the Promote segment in the QS and completed the RIS (n=109)

DIT impact on contracts

Businesses that won export contracts because of help from DIT

Base: All businesses using ITAs (n=854)



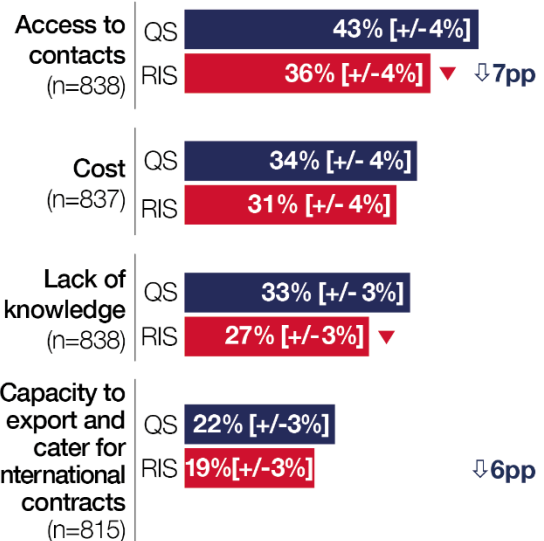
Businesses that won export contracts because of help from DIT and expanded into new markets

£50,000

Median value of export sales won per business helped by DIT

Base: All businesses using ITAs and won new overseas contracts with the help of DIT (n=199)

Reported barriers to exporting in QS and RIS



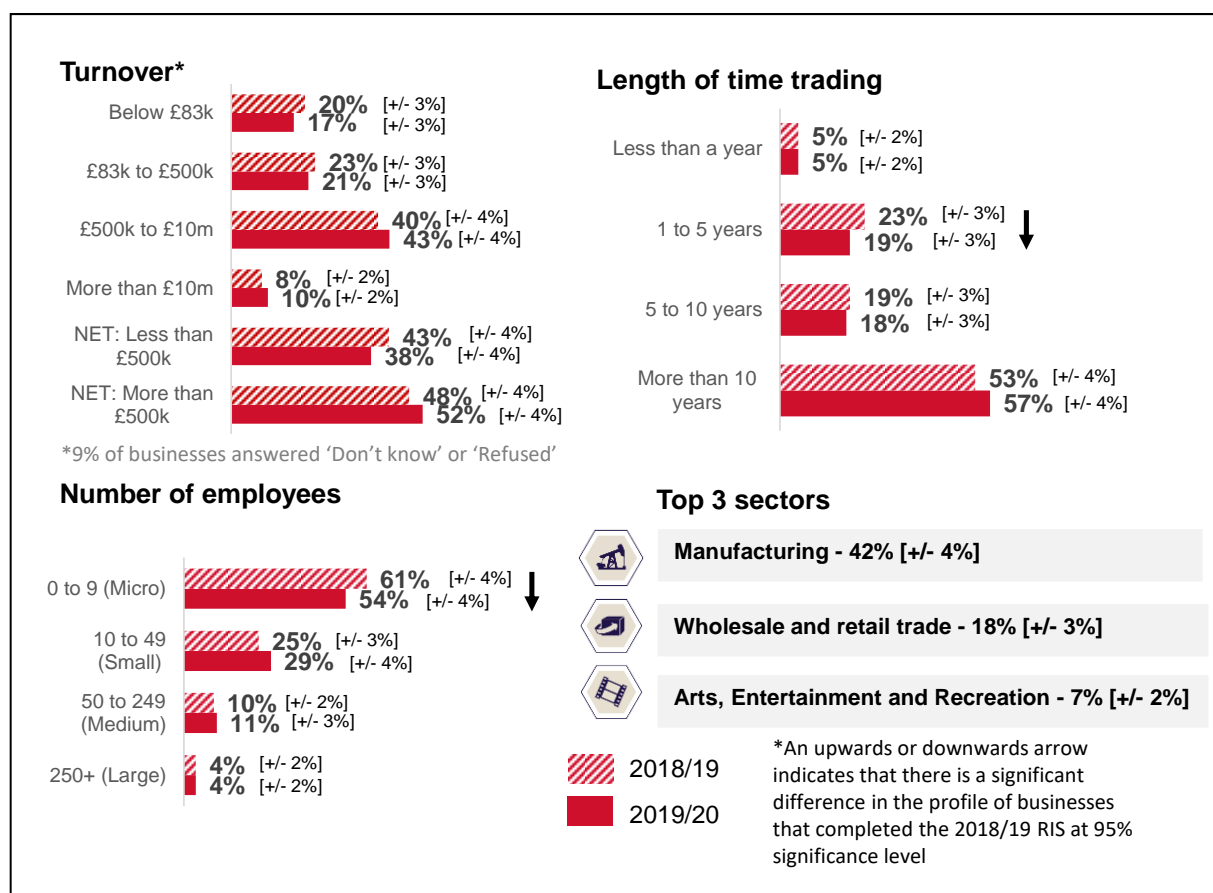
▲ Significant change from Quality Survey results at the 95% significance level



Significant percentage point (pp) change from 18/19 Reported Impact Survey results at the 95% significance level

3.1.2. Profile of RIS survey respondents: ITAs

Chart 3.1.3 Profile of RIS Survey Respondents⁸ - ITAs



Reported Impact on exporting

3.1.3. ITAs

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

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around eight in ten businesses (82%) that used an ITA fell into this segment at the time of the service delivery, compared with 86% in the RIS 12 months later. This change is not statistically significant.

Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Four per cent that used

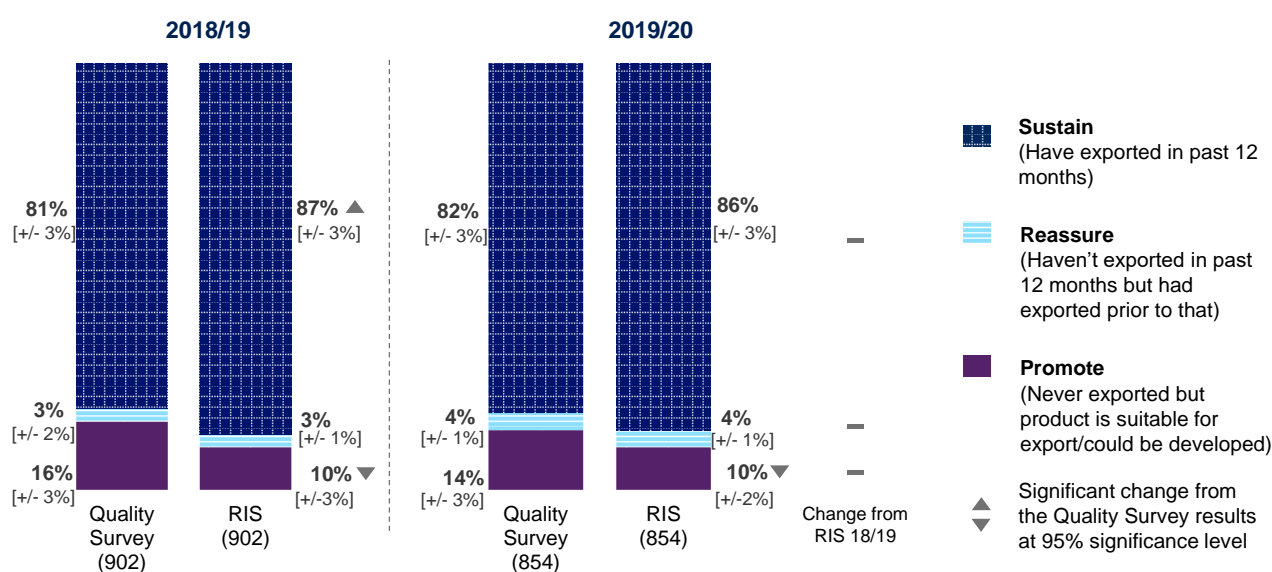
⁸ Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

an ITA fell into this segment at the time of the service delivery, and this was unchanged 12 months later (also four per cent).

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. One in seven (14%) that used an ITA were in this segment at the time of the service delivery. This decreased 12 months later to 10%.

There were no significant changes over time when comparing results from the two RIS surveys (2018/19 and 2019/20).

Chart 3.1.4 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) - ITAs⁹



Source: Composite measure merging data from several variables
 Base : All respondents who used ITAs and completed RIS: Quality Survey/ RIS
 2018/19 (902/902)
 2019/20 (854/854)

The export status of some businesses changed between the time of the service delivery and 12 months later in the RIS survey (Table 3.1.1).

Overall, five per cent of businesses reported that they had moved from Promote to Sustain, that is moved from having never exported, to having exported in the past 12 months. Two per cent of businesses reported that they had moved from Sustain to Reassure, two per cent of businesses moved from Reassure to Sustain, and two per cent of businesses moved from Sustain to Promote.

This pattern has not changed significantly from the last RIS in 2018/19.

⁹ Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote.

Table 3.1.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – ITAs

Quality Survey Reported Export status	Reported Impact Survey Reported Export Status	Percentage	Change ¹⁰
Sustain, 713 businesses	Sustain, n=678	95% [+/- 2%]	-
	Moved to Reassure, n=20	3% [+/- 1%]	-
	Moved to Promote, n=15	2% [+/- 1%]	-
Reassure, 30 businesses	Moved to Sustain, n=19	63% [+/- 18%]	-
Promote, 109 businesses	Moved to Sustain, n=45	40% [+/- 10%]	-
	Promote, n=58	54% [+/- 10%]	-

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

Looking specifically at businesses that were in the Promote segment (never exported) at the time of the Quality Survey (109 businesses), 54% reported that they had continued in Promote, whilst 40% reported that they had moved to Sustain (exported in the last 12 months) (Chart 3.1.5)¹¹. Looking specifically at businesses that were in the Sustain segment at the time of the Quality Survey (713 businesses), 95% reported that they had continued in Sustain, while three per cent reported that they had moved to Reassure and two per cent said they had moved to Promote (Chart 3.1.5)¹².

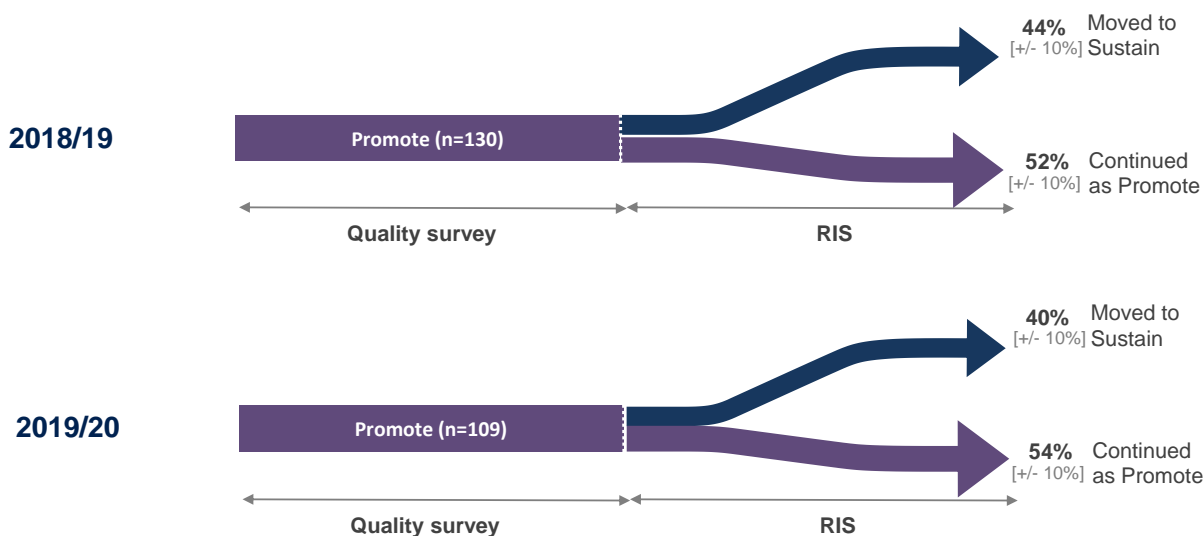
These movements were consistent with those reported in the 2018/19 RIS.

¹⁰ Charts and tables represent a statistically significant increase from 2018/19 RIS with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

¹¹ Of the businesses that were in the Promote segment at the time of the Quality Survey, four per cent reported that they had moved to Reassure. This movement is likely to be caused by respondent error when completing the survey.

¹² Of the businesses that were in the Sustain segment at the time of the Quality Survey, two per cent reported that they had moved to Promote. This movement is likely to be caused by respondent error when completing the survey.

Chart 3.1.5 Exporter status reported at time of the service delivery (Quality Survey) and 12 months later (RIS) [rebased] – ITAs



Source: Composite measure merging data from several variables
 Base: All ITA respondents who were in the Promote segment in the Quality Survey and completed RIS
 2018/19: 130 2019/20: 109.

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

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

Of the 86% of businesses that exported (742 businesses), 82% reported that they had won any new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service.

Of the 86% of businesses that exported, three in four (75%) of these exporting businesses reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.1.6). Specifically, 12% had won one overseas contract, with one in three (34%) winning between two and five. Around one in ten (11%) businesses had won more than fifteen overseas contracts (Chart 3.1.6).

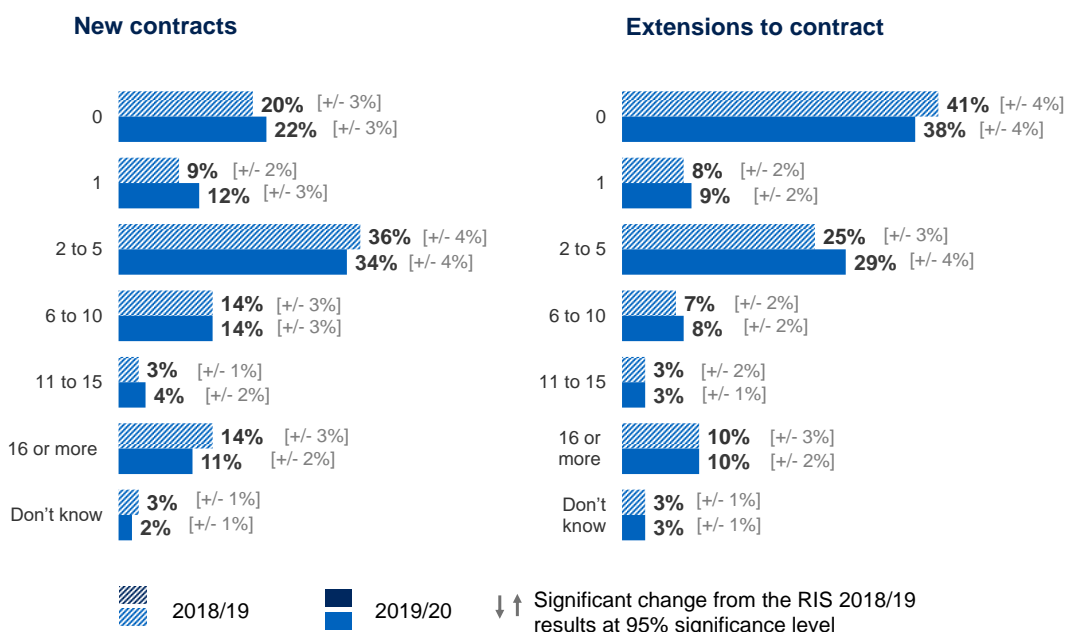
The median number of contracts won among exporting businesses that used an ITA was two (this is taken from the 86% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

Around six in ten (58%) exporting businesses that used an ITA reported they had gained extensions to existing overseas business contracts in the year since they used the service. Nine per cent extended one, and three in ten (29%) extended between two and five. One in ten (10%) extended more than fifteen existing overseas sales contracts. More than one in three (38%) businesses had not extended any existing contracts (Chart 3.1.6).

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

There were no significant changes for these findings since the 2018/19 RIS.

Chart 3.1.6 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contracts made in previous 12 months - ITAs¹³



Q_Newcontract – Firstly, how many new overseas business contracts for export sales did you win in the past year?
 Q_Extendcontract – And how many extensions to existing overseas business contracts for export sales did you win in the past year?
 Base: All respondents who used ITA and were currently selling, or had previously sold, goods or services overseas in the previous 12 months
 (2018/19: 793)
 (2019/20: 742)

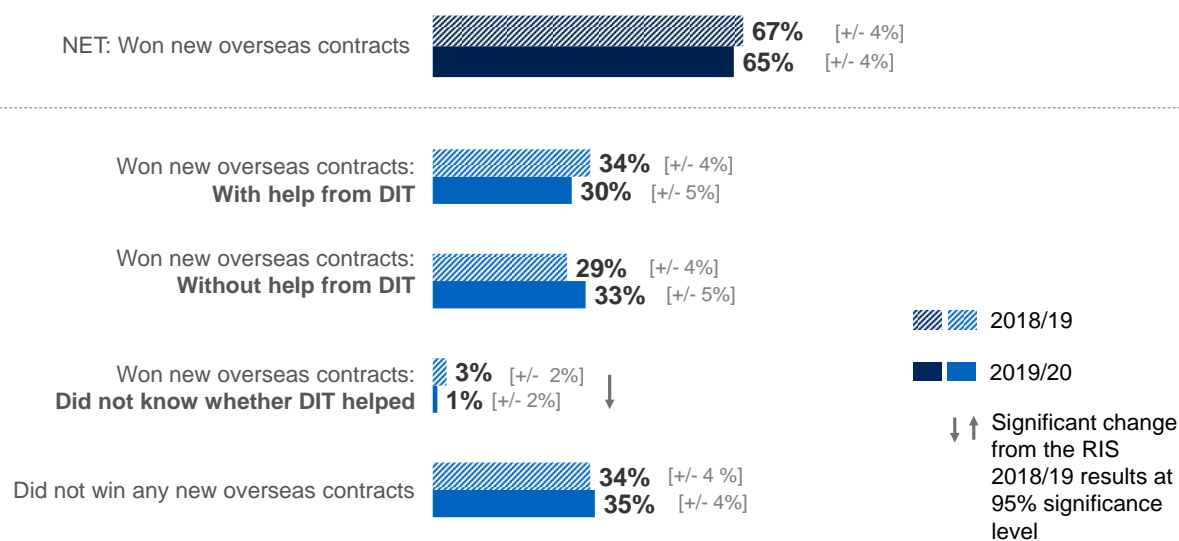
Reported additional contracts which were gained because of DIT support - ITAs

Looking at all businesses that used ITAs (including those that were not currently exporting and those that did not win any contracts or contract extensions), 30% said they won contracts with the assistance of an ITA or DIT¹⁴, 33% won one or more contracts without the assistance of DIT and one per cent were unsure.

¹³ The total percentage of all responses for this question add up to above 100 per cent because of rounding.

¹⁴ Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.1.7 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – ITAs



Base: All respondents who used ITAs
 2018/19: 902
 2019/20: 854

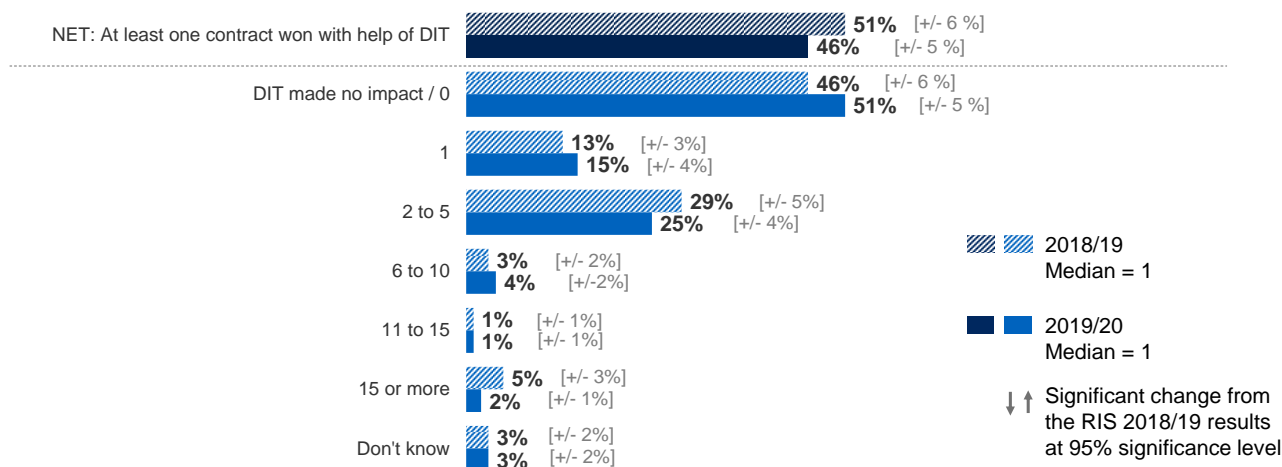
The section below **only includes results for 429 businesses, that is 50% of the businesses that were interviewed. These are businesses that both exported, won at least one new contract in the 12 months since the delivery of the ITA service, and could estimate the number of contracts won with the assistance of an ITA or DIT** - this includes businesses that said DIT made no impact on the number and value of new overseas business contracts they won. The remaining 50% of businesses interviewed did not meet these criteria and therefore were not asked the following questions.

The median number of contracts that DIT helped win (including those that reported 0) was one, for current exporters that used an ITA. This was the same as in the 2018/19 RIS.

Businesses who won at least one new contract were asked how many of these were won with the help of DIT in the last 12 months. As shown in Chart 3.1.8 below, half of businesses (51%) said they won no new overseas sales contracts with the help of DIT, or DIT made no impact. Fifteen per cent had won one new overseas sales contract, and one in four (25%) had won between two and five. Six per cent had won more than five overseas sales contracts due to DIT support.

There were no significant changes since the 2018/19 RIS.

Chart 3.1.8 Number of new overseas contracts that said to be won with the help of DIT in the last 12 months (including all those who said DIT made no impact) - ITAs



Q_ContractDIT - Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?
 Q_ContractNumber-How many new overseas contracts were won with help from DIT
 Base: All respondents who used TAP and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months
 2018/19: 439
 2019/20: 429

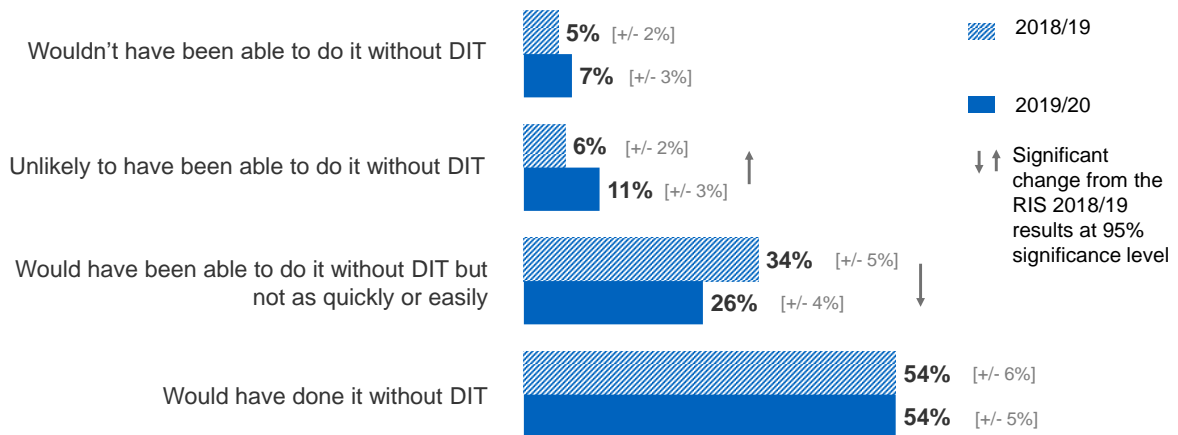
Importance of DIT’s support in winning overseas contracts - ITAs

The 50% of businesses that exported, won at least one new contract in the 12 months since the delivery of the ITA service and could estimate the number of contracts won with the assistance of an ITA or DIT (excluding those that answered ‘don’t know’) were asked how important this help was. To understand the support the service provided for this analysis, **exporting businesses who said that DIT made no impact / did not help them win any new contracts were not asked this question directly but have been included in the ‘would have done it without DIT’ code below.**

Just under half of these businesses reported that DIT was important in helping them win these contracts. Seven per cent of those who won at least one new overseas contract said they would not have been able to do it without DIT, while 11% thought it was unlikely they could have done it without DIT. A further one in four (26%) thought they would not have been able to do it as quickly or easily without DIT (Chart 3.2.9). The remaining 54% thought they would have been able to achieve the same outcome without DIT support.

In comparison with the 2018/19 RIS, there has been an increase in the proportion that said it was unlikely they could have won the contracts without DIT (from 6% to 11%), while there has been a decrease in the proportion that said they would not have been able to do it as quickly or easily without DIT (from 34% to 26%).

Chart 3.1.9 How important DIT's help was in winning overseas contracts - ITAs



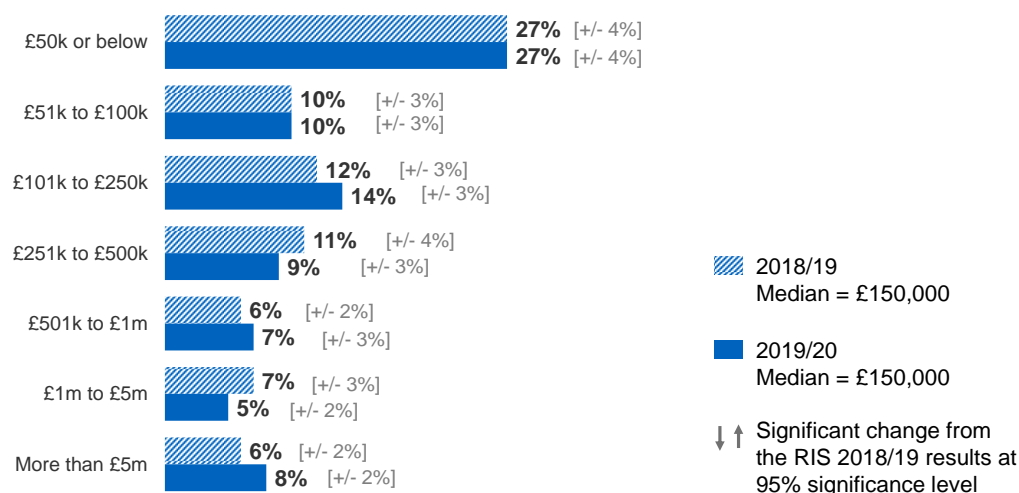
QContractHelp – How important was DIT's help in winning these overseas contracts?
 Base: All ITA respondents who won any new overseas contracts in the past year
 2018/19: 427
 2019/20: 429

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

Reported value of the export sales of new contracts - ITAs

The 65% of businesses that reported winning any new overseas contracts (excluding extensions to existing contracts) were also asked the value of the export sales of those contracts in total (Chart 3.1.10). The median value of the export sales of all new overseas contracts for these businesses was £150,000. Around a quarter (27%) won contracts with export sales value of £50,000 or below. Just over one in ten (13%) said that the export sales of the new overseas contracts won was worth more than £1 million. These figures have remained unchanged since the 2018/19 RIS.

Chart 3.1.10 Value of all new overseas contracts made in previous 12 months - ITAs



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

2018/19: 604
 2019/20: 559

Reported additional value of DIT support - ITAs

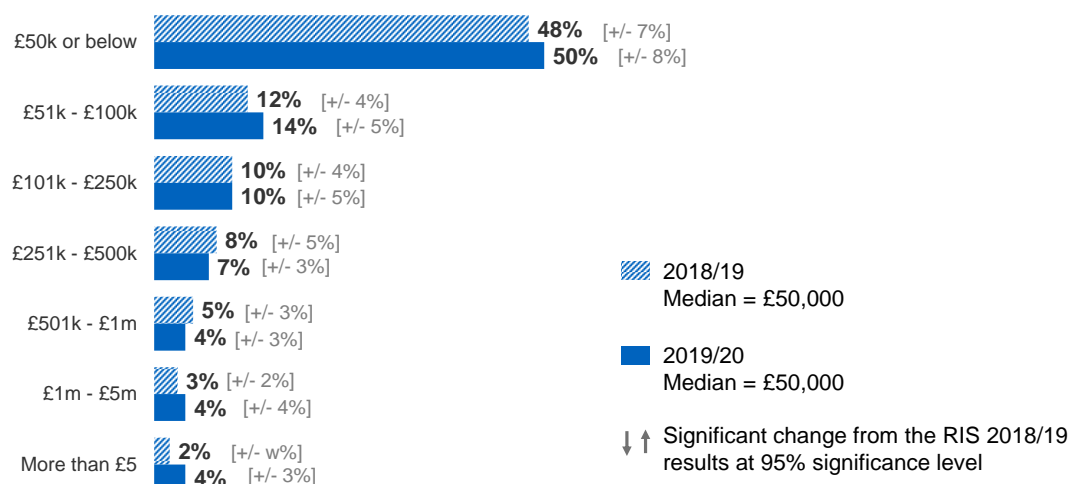
This section looks at the additional value that support from DIT contributed towards businesses. If businesses were not able to estimate the impact of the specific service they were being interviewed about they were asked to think about the impact from all of their interactions with DIT. This measures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

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

Half (50%) reported additional export sales of £50k or below, with a further 14% reporting additional new export sales of between £51k and £100k. There was a small proportion of businesses that had exceptionally large value added by DIT support. Eight per cent won overseas sales contracts helped by DIT of more than £1m (Chart 3.2.11).

There were no significant changes from the 2018/19 RIS.

Chart 3.1.11 Value of new overseas contracts helped by DIT support in previous 12 months - ITAs



QcontractValueDIT – What was the value of these new overseas business contracts that your business won with the help of [SAMPLED SERVICE] /DIT support last year?

Base: All respondents who used TAP and won any new overseas sales contracts with the help of DIT

2018/19: 238

2019/20: 199

When looking solely at the businesses that could estimate the value of contracts DIT helped in winning, when compared with the total value of all their new export contracts, it is estimated that an ITA helped with 50% of the value of new contracts (median value). For a third (35%) of these businesses the entire value of new export contracts that they won in the previous 12 months was helped by ITAs.

To estimate the **median value of export sales per contract that ITAs helped businesses win**, we combined the value of export sales won and divided it by the number of contracts won with DIT support; the median value was £20,000 per contract. We also estimated the **median value of export sales won per business with DIT support** (where the same business may have won several new contracts); the median value per business that won contracts was £50,000 (across all contracts).

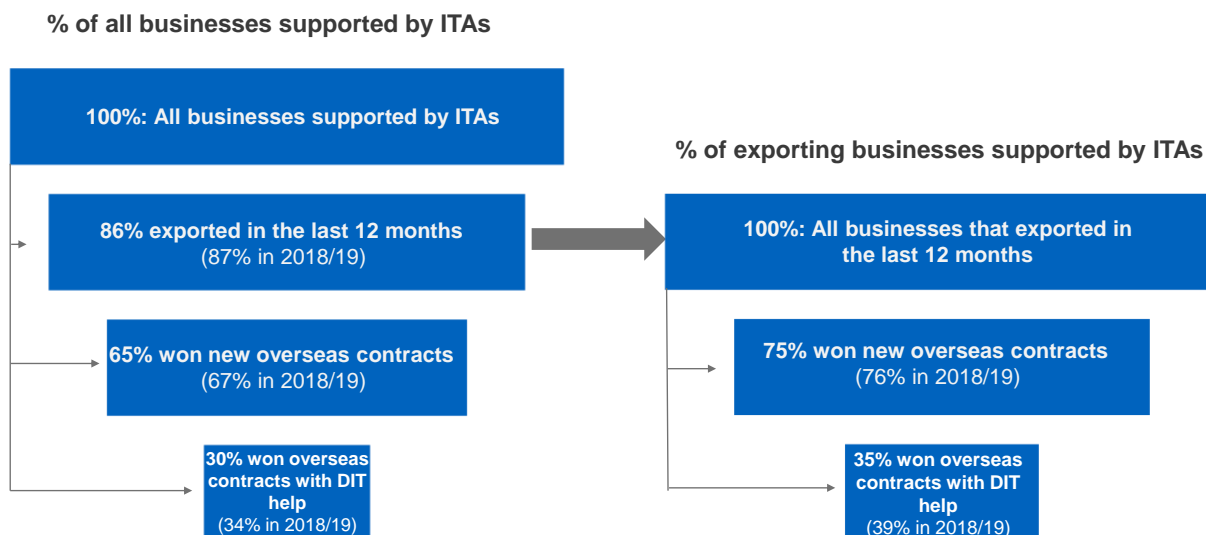
3.1.6. Summary of reported impact as a result of DIT support: ITAs

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

Looking at all businesses supported by ITAs interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), more than eight in ten (86%) were exporters, meaning they were exporting at the time of service use or in the last 12 months.

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this¹⁵.

Chart 3.1.12 Summary of businesses supported by ITAs¹⁶



Median value of export sales per contract that DIT helped businesses win: **£20,000** (£17,500 in 2018/19)

Median value of export sales won per business with DIT support: **£50,000** (£50,000 in 2018/19)

Base: All respondents who used ITAs
2018/19: 902
2019/20: 854

↓ ↑ Significant change from the RIS 2018/19 results at 95% significance level

3.1.7. Exposure and growth within new markets: ITAs

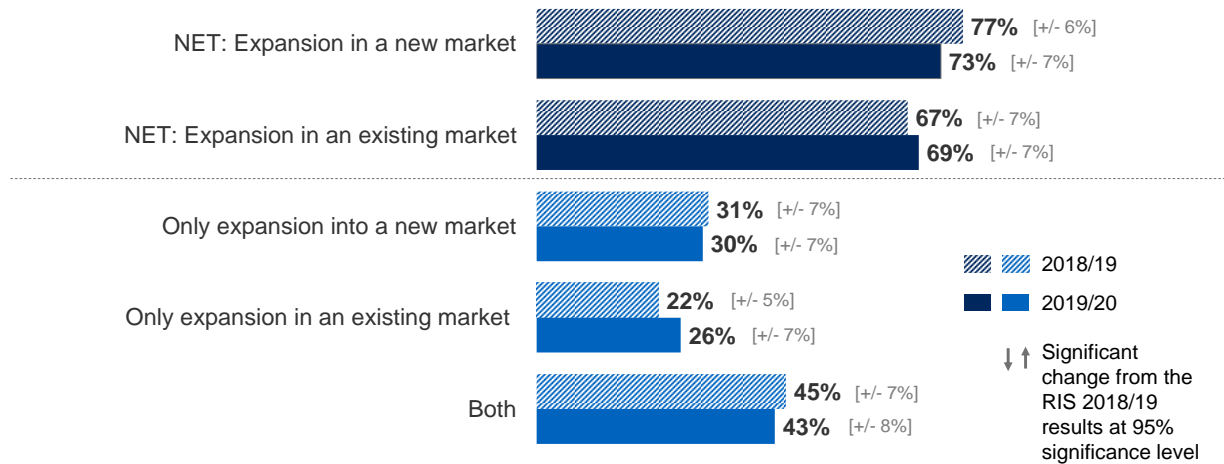
Businesses that said they were helped by DIT to win new overseas contracts and were able to provide details of the number and value of these contracts were asked whether these new contracts represented expansion into a new market or expansion within an existing market (or both). Similar proportions of businesses said they were assisted with expansion into a new market (73%) and within an existing market (69%). Just under half (43%) reported that DIT helped them expand into both existing and new markets. An additional three in ten (30%) said that DIT helped them expand into new markets (but not existing markets), while one in four (26%) expanded within an existing market (but not into new markets).

¹⁵ The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

¹⁶ In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 46% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so $46\% * 65\% = 30\%$. Find more information about how this was calculated in the technical report.

There were no significant changes from the 2018/19 RIS.

Chart 3.1.13 Whether new contracts won with DITs help represented expansion into new markets or existing markets - ITAs

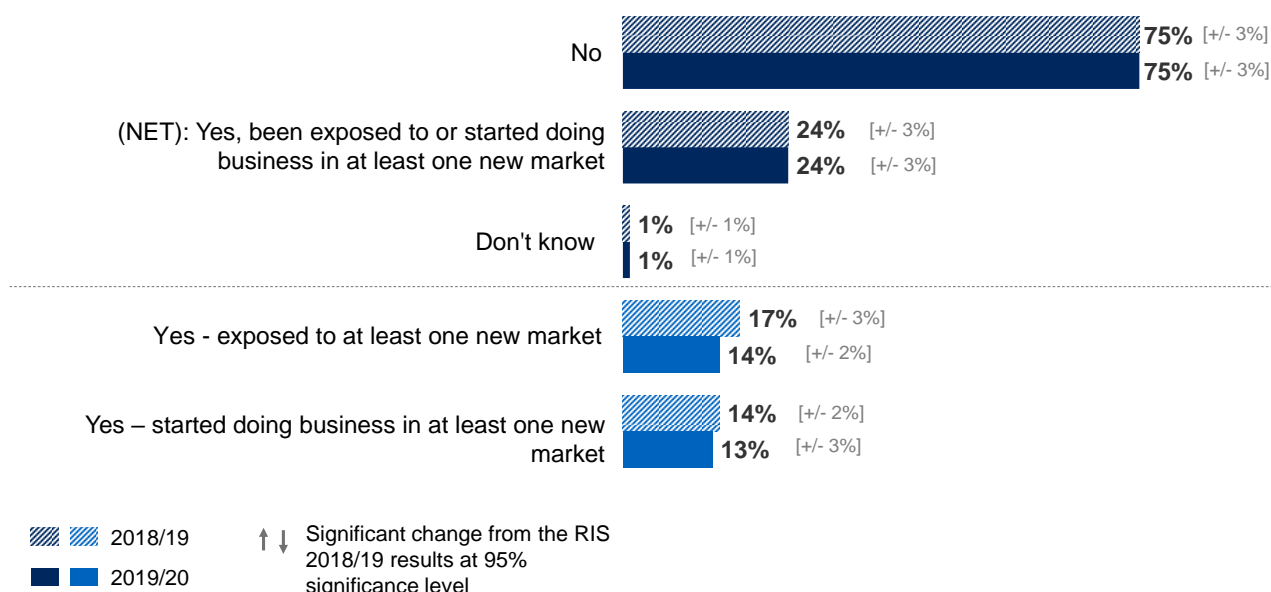


QContractRepresent – And did these new overseas contracts represent...?
 Base: All respondents who used ITAs and made new overseas contracts in the last year that were helped by DIT
 2018/19: 238
 2019/20: 199

All businesses that used ITAs were asked whether they received increased exposure or started doing business in any new markets because they accessed the ITA service¹⁷. One in seven (14%) had been exposed to at least one new market and a similar proportion (13%) had started doing business in at least one new market as a result of using the ITA service. These figures remain unchanged since the 2018/19 RIS.

¹⁷ Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

Chart 3.1.14 Whether increased exposure or starting business in a new overseas market - ITAs

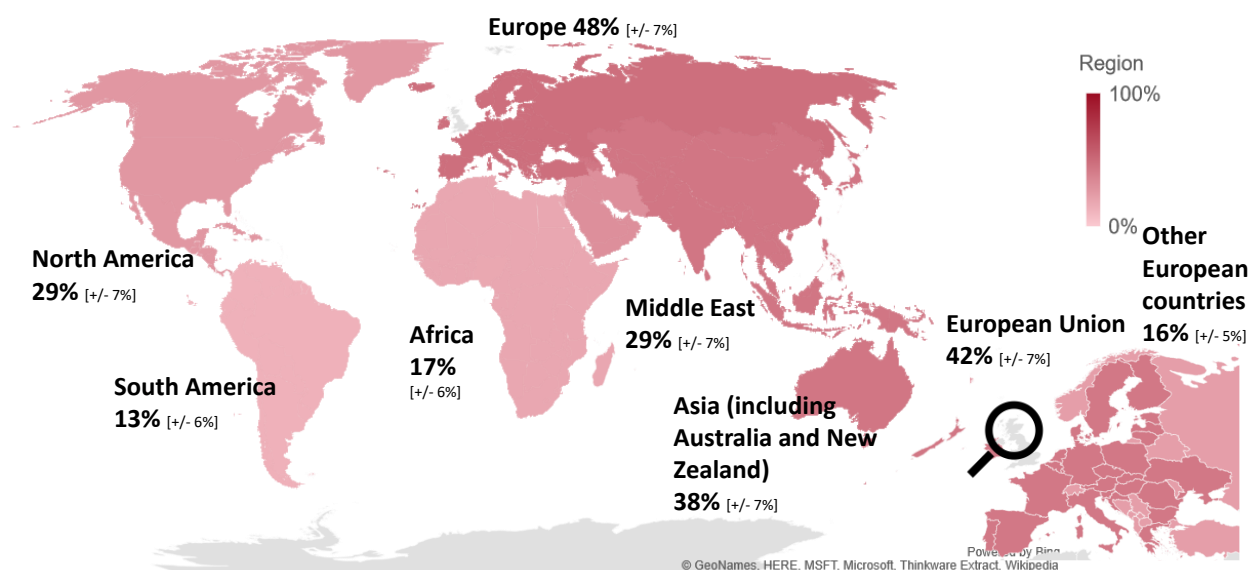


QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SAMPLED SERVICE]? Base: All respondents who used ITAs
 2018/19: 902
 2019/20: 854

The most common area for increased exposure or business was Europe (48%), followed by Asia (including Australia and New Zealand) (38%), North America (29%) and the Middle East (29%). Looking in more detail at Europe, around four in ten (42%) reported that their increased exposure or new business was in the European Union, while one in six (16%) had new or increased exposure in other European countries.

There were no significant changes since the 2018/19 RIS.

Chart 3.1.15 Which new markets has the business started doing business in or been exposed to – ITAs



QNewRegion – And which of the following new markets has your business started doing business in or been exposed to? Base: All respondents who have had increased exposure to, or started doing business in at least one new market (211)

Table 3.1.2 Regions organisations exports to or exported to previously - ITAs

	2018/19	CI (+/-)	2019/20	CI (+/-)	Change ¹⁸
Europe	48%	7%	48%	7%	-
European Union	43%	7%	42%	7%	-
Other European countries	23%	6%	16%	5%	-
Asia (including Australia and New Zealand)	44%	7%	38%	7%	-
Middle East	31%	7%	29%	7%	-
North America	27%	6%	29%	7%	-
Africa	18%	6%	17%	6%	-
South America	13%	4%	13%	6%	-
Base	243		211		

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

¹⁸ Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

3.1.8. Barriers to exporting: ITAs

Businesses were asked in both the Quality Survey and Reported Impact Survey about some **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all). This section compares results for businesses who completed both surveys and provided a response to this question in both surveys¹⁹.

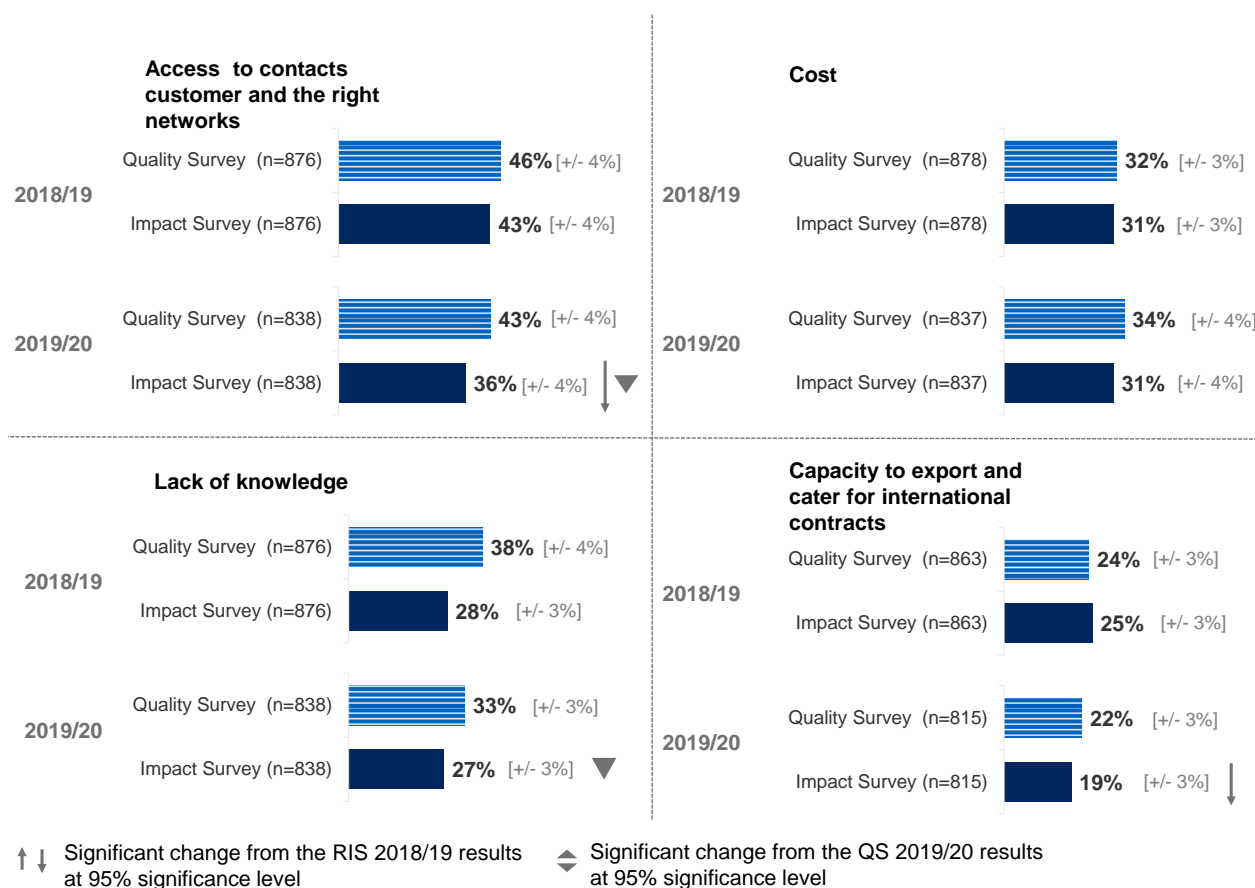
When comparing results with the 2018/19 RIS, there was a significant decrease in the proportion that said 'access to contacts, customers and the right networks' was a barrier to exporting (rating 7 of 10 out of 10), from 43% in the 2018/19 RIS to 36% in 2019/20 (Chart 3.2.16). There was also a decrease in the proportion that said 'capacity to export and cater for international contracts' was a barrier, from 25% to 19%.

Looking at changes from the 2019/20 Quality Survey to the 2019/20 RIS, once again there was a significant decrease in the proportion that said 'access to contacts, customers and the right networks' was a barrier to exporting, from 43% to 36%. There was also a decrease in the proportion that said 'lack of knowledge' was a barrier, from 33% to 27%.

There were no significant changes in the proportion of businesses that said 'cost' was a barrier to exporting, either when comparing with the 2018/19 RIS or the 2019/20 Quality Survey.

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

Chart 3.1.16 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys - ITAs²⁰



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

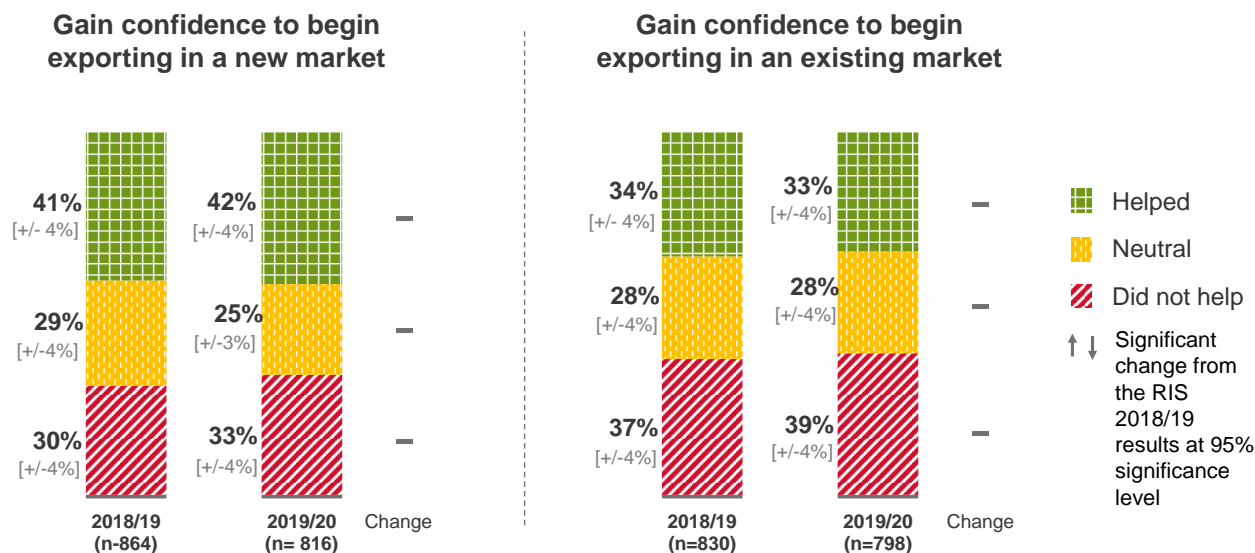
3.1.9. Wider benefits of service: ITAs

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market, using a similar rating scale as above. Businesses were more likely to have said that using an ITA helped them gain confidence to begin exporting in a new market (42%) than that it did not help them (33%). However, businesses were less likely to say that using an ITA helped them gain confidence to increase exporting in an existing market (33%) than that it did not help them (39%).

There were no significant changes from the 2018/19 RIS.

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

Chart 3.1.17 To what extent experience of the service helped to build confidence in exporting – ITAs



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

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.1.18 shows the items that were asked of businesses that used ITAs. This shows that:

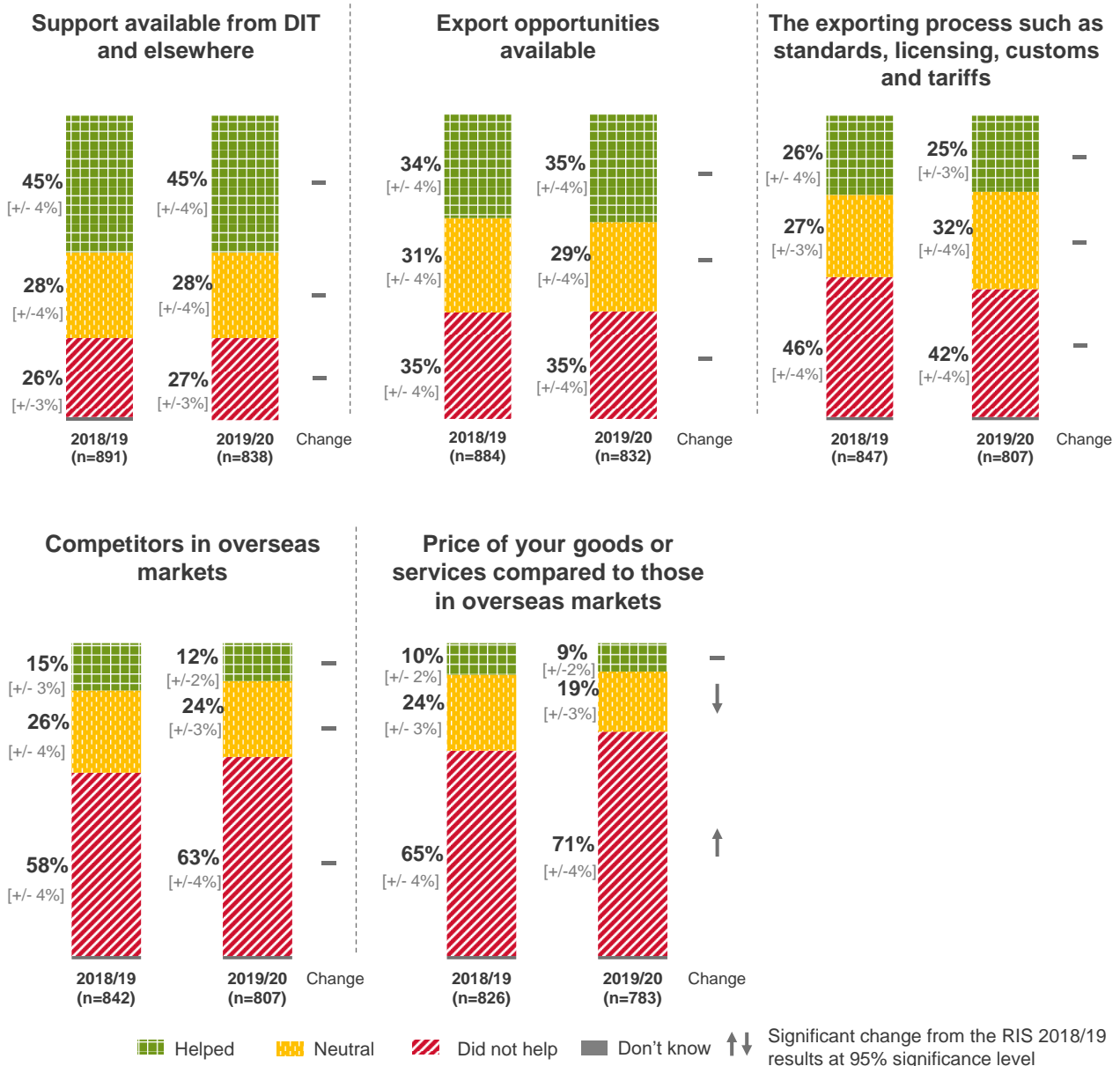
- Just under half (45%) of businesses that had used ITAs said that the service helped them by increasing their knowledge of the support available from DIT and elsewhere, while a quarter (27%) said the service did not help them in this way.
- About a third of businesses that had used ITAs (35%) said that the service had helped them to increase their knowledge of the export opportunities available, while the same proportion (35%) said they were not helped in this way.
- One in four (25%) businesses that had used ITAs said it improved their knowledge of the exporting process, while 42% said the service did not help them in this way.
- Smaller proportions said that using the ITAs improved their knowledge of the price of goods compared with those in overseas markets (9%) or competitors in overseas markets (12%).

Businesses were more likely to say that the service had helped them to increase their knowledge of the export opportunities available if they had a smaller turnover (41% among those with an annual turnover of under £500,000) or if they were 'expanding' exporters (42%). Online exporters were particularly likely to report increased knowledge, in relation to the export opportunities available (42%), the exporting process (30%) and competitors in overseas markets (15%).

When comparing results with the 2018/19 RIS, there was a significant increase in the proportion that said they had not improved their knowledge of the price of goods compared

with those in overseas markets, from 65% to 71%. There was a corresponding decrease in the proportion that said their knowledge had stayed the same, from 24% to 19%.

Chart 3.1.18 To what extent the business felt it has improved its knowledge as a result of using the service – ITAs



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

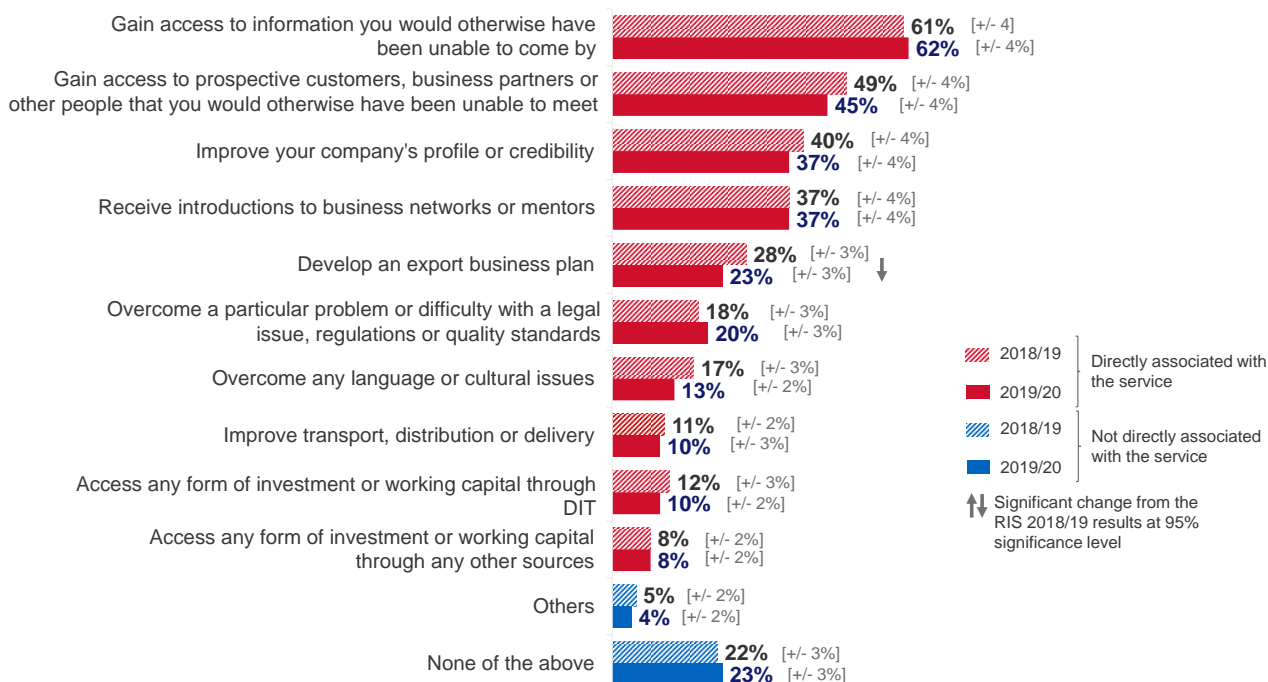
Businesses were asked about other ways they had benefitted from using an ITA in the year between dealing with the ITAs and the RIS interview. A detailed breakdown of responses is shown in Chart 3.1.19, where activities in red show those most closely associated with the service.

The most frequent responses from a pre-coded list were to gain access to information they would otherwise have been unable to come by (62%) and gain access to prospective customers (45%). Around four in ten improved the company's profile or credibility (37%) or received introductions to business networks (37%). One in four developed an export

business plan (23%), while two in ten overcame problems with a legal issue, regulation or quality standards (20%).

There has been a decrease since the 2018/19 RIS in the proportion that developed an export plan, from 28% to 23%. Otherwise, there were no significant changes since the 2018/19 RIS.

Chart 3.1.19 In what ways has the business felt it had benefited from DIT support - ITAs²¹



QServiceBenefit – In which of the following ways if any, has your business benefited specifically from [SAMPLED SERVICE] over the last year?
 Base: All respondents who used ITAs
 2018/19: 902
 2019/20: 854

Businesses were asked whether using an ITA had helped, or will help, support innovation and development as a business. Over seven in ten (76%) said that using the service helped them with innovation or development in some form. Answer codes shown in red were most closely associated with the service. The most frequent response was to 'improve the way you do business overseas' (58%). More than four in ten said that using the ITA service helped them to introduce new products or services (45%) or access training and skills for themselves or their staff (43%). Around three in ten said that it helped them improve their existing products or services (33%), make improvements to their new product or services development strategy (31%) or gain new ideas about products or services (30%).

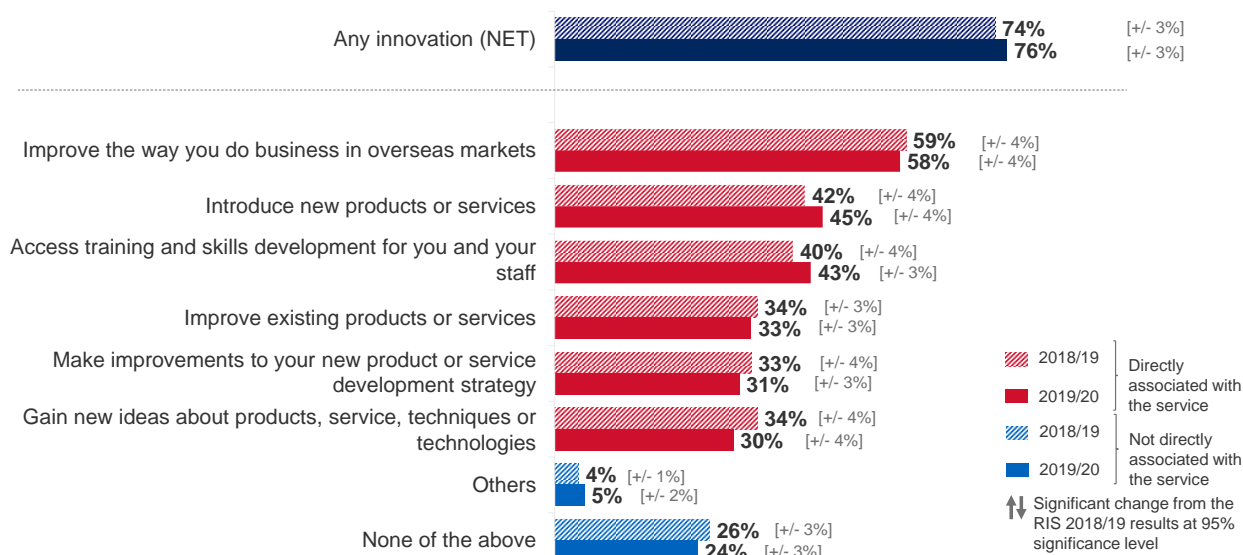
Businesses that traded goods were more likely to say they had accessed training and skills for their staff (46% compared with 32% that traded services only). Online exporters were more likely to say the service helped them with product development, specifically with introducing new products or services (48%), improving their existing products or

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

services (37%) or making improvements to their new product or service development strategy (37%).

There were no significant changes since the 2018/19 RIS.

Chart 3.1.20 Whether the service has / will help innovation and development - ITAs ²²
23



QInnovationSupport – Still thinking of [SAMPLED SERICE], has this service helped or do you expect it to help your business with development and/or innovation? Specifically...
 Base: All respondents who used ITAs
 2018/19: 902
 2019/20: 854

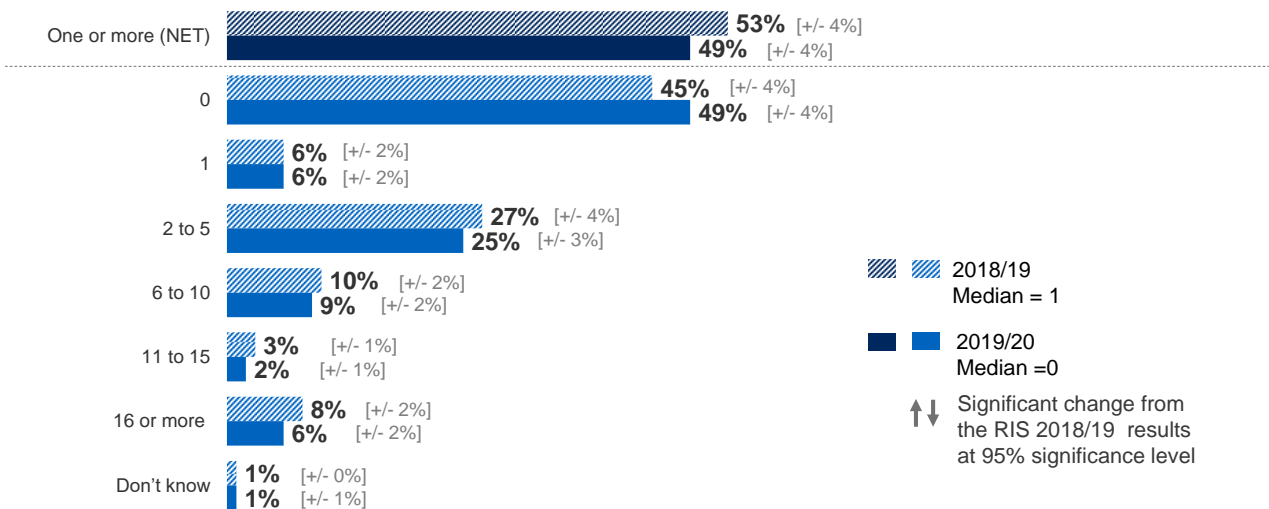
International contacts

Businesses were asked how many overseas contacts they had made as a result of using an ITA over the past year (Chart 3.1.21). Around half (49%) of businesses made at least one new overseas contact in the year since using the ITA service. Six per cent made one new overseas contact, and a quarter (25%) made between two and five new contacts. Nine per cent of businesses made between six and ten new overseas contacts, and a similar proportion made more than ten new contacts (8%). Around half (49%) reported that they had not made any new contacts as a result of using the ITA service.

²² The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.

²³ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.1.21 Number of new overseas contacts made in previous 12 months – ITAs



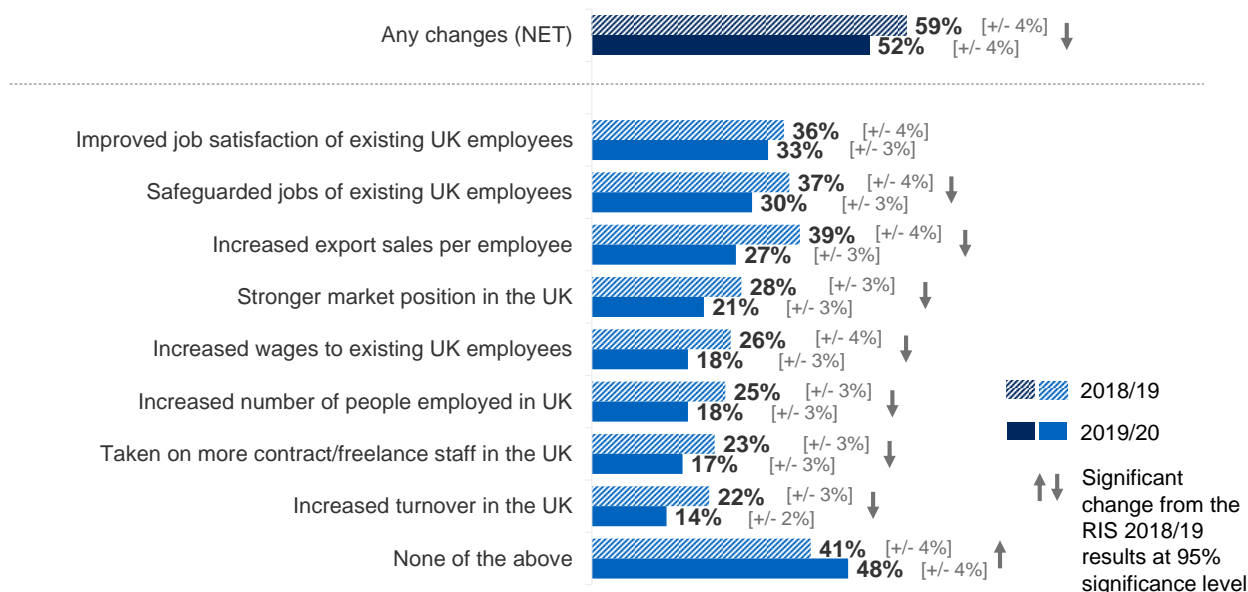
Q_ContactsMade –How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
 Base: All respondents who used ITAs
 2018/19: 902
 2019/20: 854

Businesses were asked about the impact they had seen or expected to see as a direct result of using the ITA service. Around a third of businesses said they thought using the ITA service had, or would, improve job satisfaction of existing UK employees (33%) and safeguard jobs in the UK (30%). Around a quarter said they had increased export sales per employee (or expected to do so) (27%), while around a fifth said they had seen or expected to see a stronger market position in the UK (21%), increased wages to existing UK employees (18%) and an increase in the number of their UK employees (18%). A similar proportion (17%) had taken on more contract or freelance staff in the UK, while one in seven had seen or expected to see increased turnover in the UK (14%).

‘Expanding’ exporters were more likely than other businesses to say that using the ITA service had helped them to increase export sales per employee (47%), while online exporters were more likely than other businesses to say they had seen or expected to see a stronger market position in the UK (28%). In addition, businesses with a higher turnover (£500,000 or more) were more likely than those with a lower turnover (less than £500,000) to report a number of impacts, including increasing the number of people employed in UK (22% compared with 15%), increasing wages to existing UK employees (22% compared with 13%) and increasing export sales per employee (32% compared with 23%).

In comparison with the 2018/19 RIS, there has been a decrease in the impact that businesses have seen or expected to see as a direct result of using the ITA service. This applies to all of the specific items except for improved job satisfaction, where there has been no significant change. The largest decrease has been in relation to increased export sales per employee, which has decreased from 39% in 2018/19 to 27% in 2019/20. Overall, around half (52%) of businesses in 2019/20 RIS said they had seen or expected to see at least one change as a result of using the ITA service, down from 59% in 2018/19.

Chart 3.1.22 Changes expected / seen in the UK business as a result of receiving the service - ITAs²⁴



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
 Base: All respondents who used ITAs
 2018/19: 902
 2019/20: 854

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

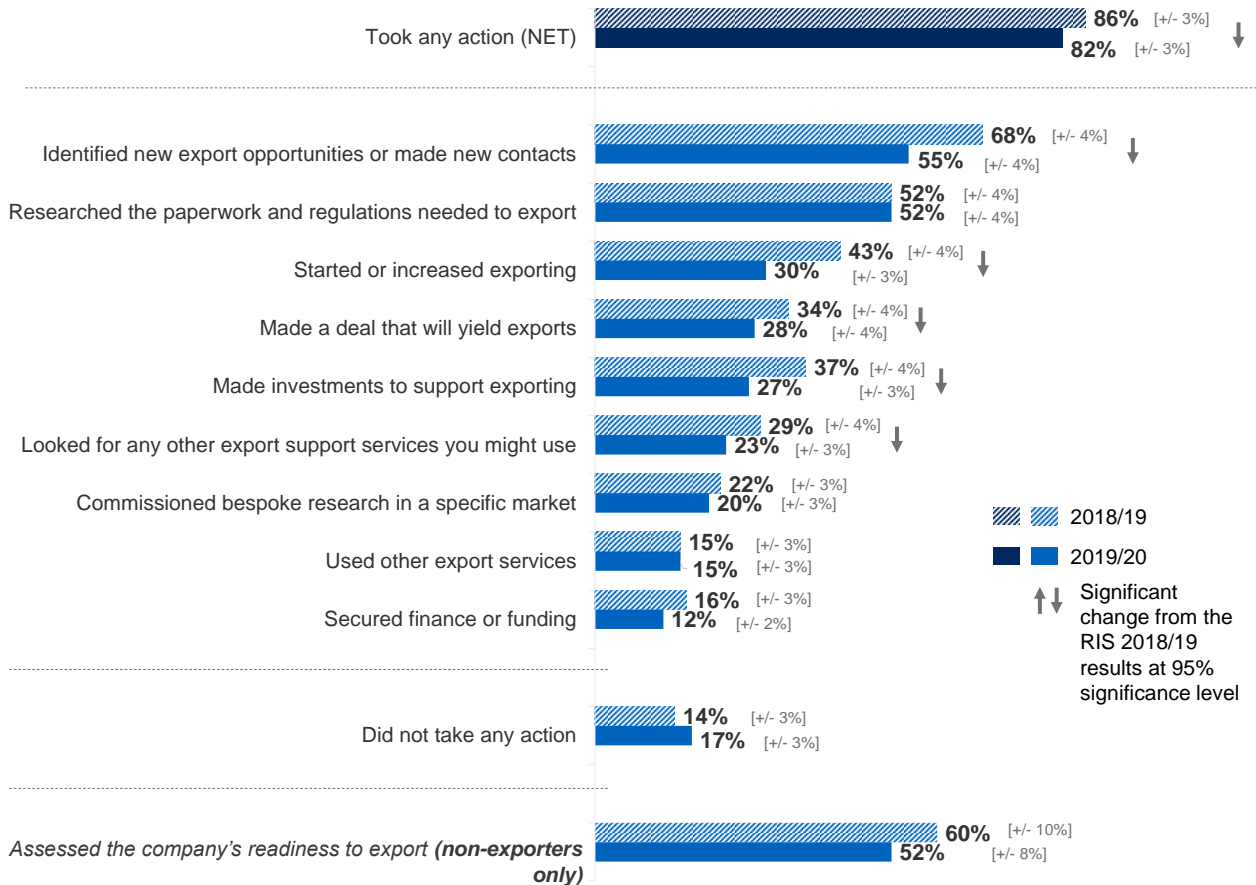
Businesses were asked about the actions they had taken following their use of the ITA service (Chart 3.1.23). Around half reported they had identified new export opportunities or made new contacts (55%) or had researched the paperwork and regulations needed to export (52%). Researching the paperwork and regulations was less common among businesses with a small turnover (43% among those with an annual turnover of less than £83,000).

Three in ten said they started or increased exporting (30%), while around one in four made a deal that would yield exports (28%), had made investments to support exporting (27%) or had looked for other export support services (23%). Two in ten (20%) had commissioned bespoke research in a specific market. Around half (52%) of businesses that were not exporting had assessed the company’s readiness to export.

Businesses were less likely to have taken action of some kind than in the 2018/19 RIS. Overall, eight in ten (82%) had taken some form of action, down from 86% in 2018/19. Specifically, businesses were less likely than in 2018/19 to have identified new export opportunities or made new contacts (down from 68% to 55%), started or increased exporting (from 43% to 30%), made a deal that would yield exports (from 34% to 28%), made investments to support exporting (from 37% to 27%) and looked for other export support services (from 29% to 23%).

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

Chart 3.1.23 What the business has done as a result of receiving the service - ITAs ²⁵
26



QResultService – What has your business done as a result of ITAs?
 Base: All respondents who used ITAs. 2018/19: 902, 2019/20: 854.
 Non-exporters: 2018/19: 140 2019/20: 188

Businesses that reported they had made an investment as a result of using the ITA service were asked what investments they had made (236 respondents). The most common investment was an increase in marketing and sales activity (84%). At least half made R&D investment (64%), increased the number of staff (55%) or made capital investments (51%). One in five (20%) bought or leased any commercial property.

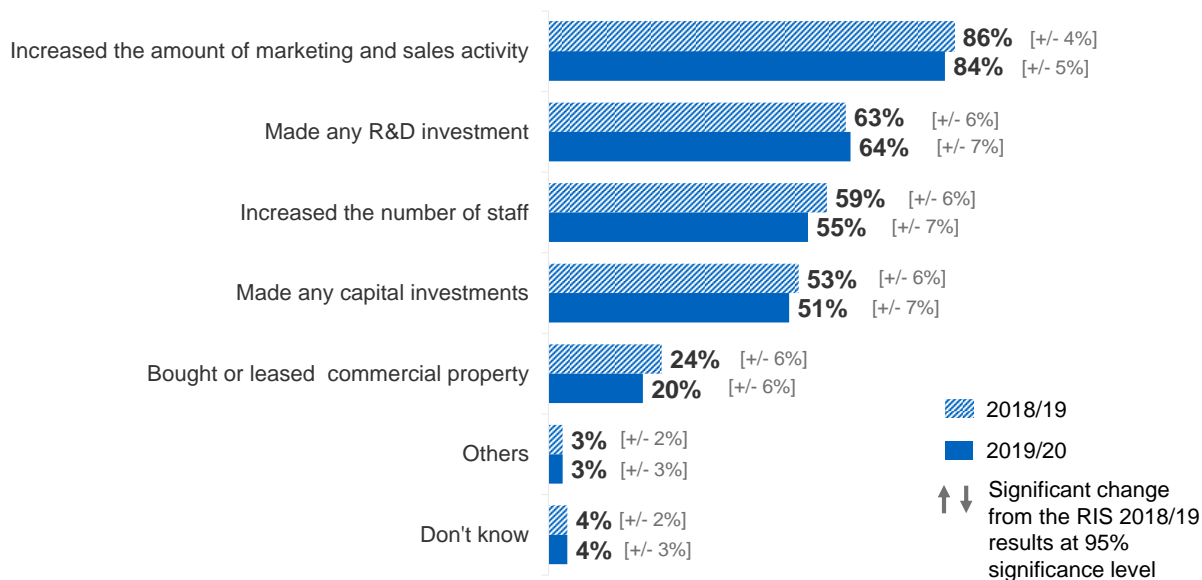
Businesses with a higher turnover were more likely to have increased the number of staff (67% among those with an annual turnover of £500,000 or more compared with 41% of those with a turnover of less than £500,000).

There were no significant changes since the 2018/19 RIS.

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

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

Chart 3.1.24 Type of investments made to support new or increased export opportunities following using ITAs²⁷



QInvestmentMade - Which of the following investments has your business made to support new or increased export opportunities?
 Base: All respondents that made investments to support exporting as a result of using ITAs
 2018/19: 352
 2019/20: 236

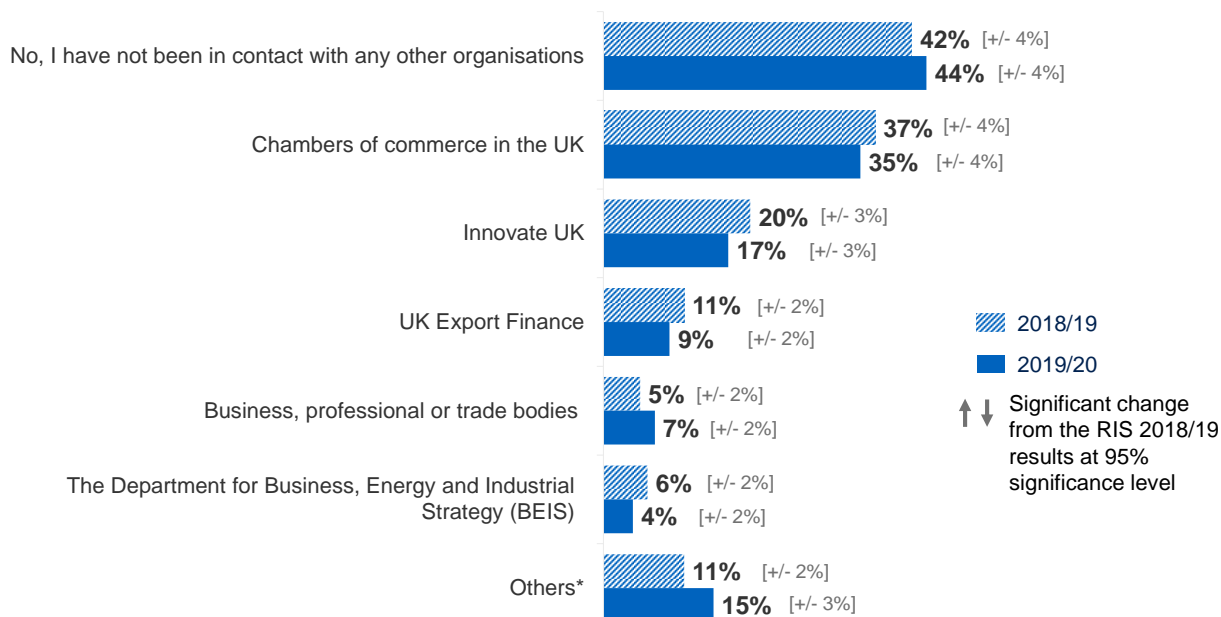
Businesses were asked what organisations they had been in contact with since using ITAs. Around a third (35%) of businesses had been in contact with the British Chambers of Commerce and around two in ten (17%) had been in contact with Innovate UK. One in ten had been in contact with UK Export Finance (9%). Around two in five (44%) businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Medium and large businesses were more likely to have been in contact with the British Chambers of Commerce (49% compared with 33% of micro and small businesses) and with business, professional or trade bodies (18% compared with 5%). Business that only traded in services were less likely to have been in contact with the British Chambers of Commerce (24% compared with 41% of those that traded goods). Businesses that were new to exporting or that had not started exporting were more likely to have contacted Innovate UK (30% and 25% respectively).

There were no significant changes since the 2018/19 RIS.

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

Chart 3.1.25 What organisations respondents have been in contact with since receiving the service - ITAs²⁸



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

Base: All respondents who used ITAs

2018/19: 902

2019/20: 854

*Other services include 'Overseas administrations' (2%), 'Private consultants or advisors' (2%), 'Friends/colleagues' (1%), 'Local Enterprise Partnerships' (1%), 'Banks' (1%), 'Online / Google' (1%) and any others.

²⁸ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

3.2. Posts

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

3.2.1. Posts: Quality survey summary

These findings are based on interviews with 264 businesses who used the Posts service from April 2019 to March 2020 and participated in both the Quality Survey and Reported Impact Survey (RIS).

Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=765), as an overview of businesses' experience of using Posts.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own²⁹. Around half (47%) were 'Promoters' of Posts (score of 9-10), while 18% were 'Detractors' (score of 0-6) and 30% were neutral (score of 7-8). **Overall, Posts had an NPS of 30.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)³⁰.

Overall, **three in four (76%) businesses were satisfied with their experience of Posts** (rating of 7 or more out of 10), and this included around one in five businesses (21%) who gave a 'very satisfied' rating (10 out of 10). The figures for NPS and satisfaction with the service remain unchanged since 2018/19.

²⁹ Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.

³⁰ Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

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

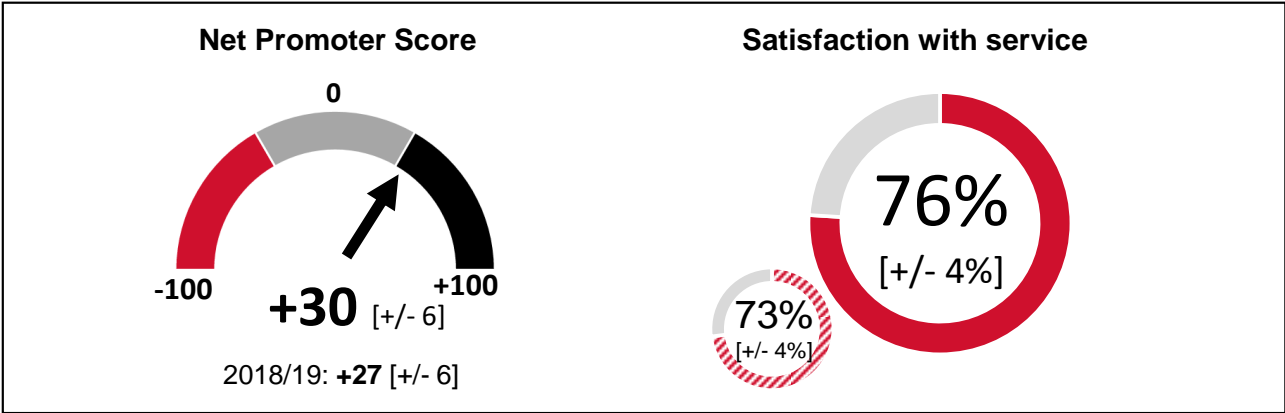


Chart 3.2.2 Key indicators from the RIS survey – Posts

Summary page – Posts

QS: Quality Survey
 RIS: Reported Impact Survey

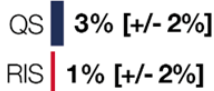
Export Status

Sustain (current exporters)

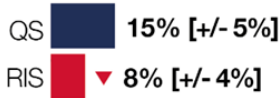


Reassure

(exported before but not in last 12 months)

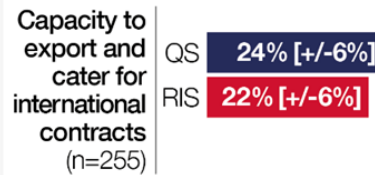


Promote (not exported before)



Base: All businesses using Posts (n=264)

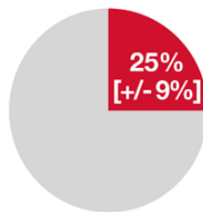
Reported barriers to exporting in QS and RIS



DIT impact on contracts

Businesses that won export contracts because of help from DIT

Base: All businesses using Posts (n=264)

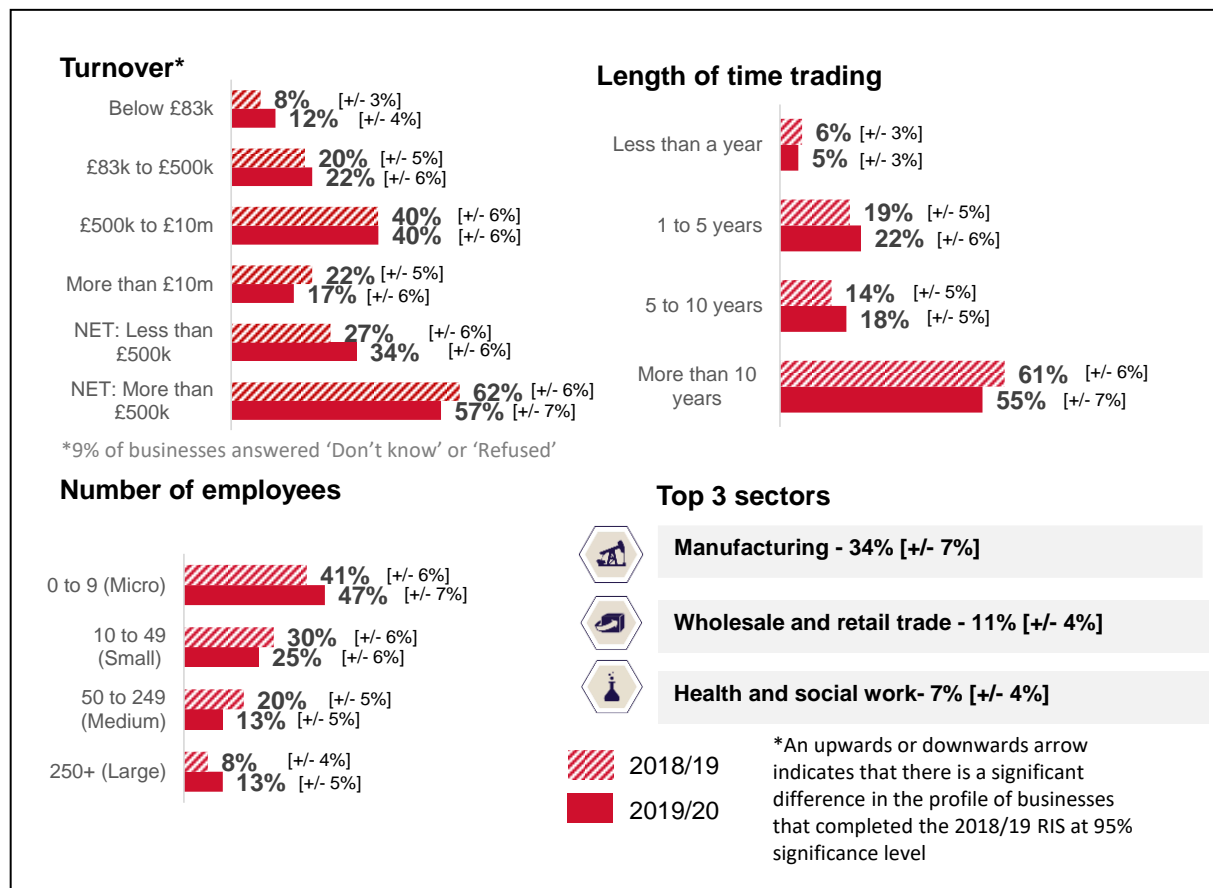


▲ Significant change from Quality Survey results at the 95% significance level

⬆ Significant percentage point (pp) change from 18/19 Reported Impact Survey results at the 95% significance level

3.2.2. Profile of RIS survey respondents: Posts

Chart 3.2.3 Profile of RIS Survey Respondents³¹ - Posts



Reported Impact on exporting

3.2.3. Posts

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

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around eight in ten businesses (83%) that used Posts fell into this segment at the time they accessed the service. This increased to 90% in the RIS 12 months later.

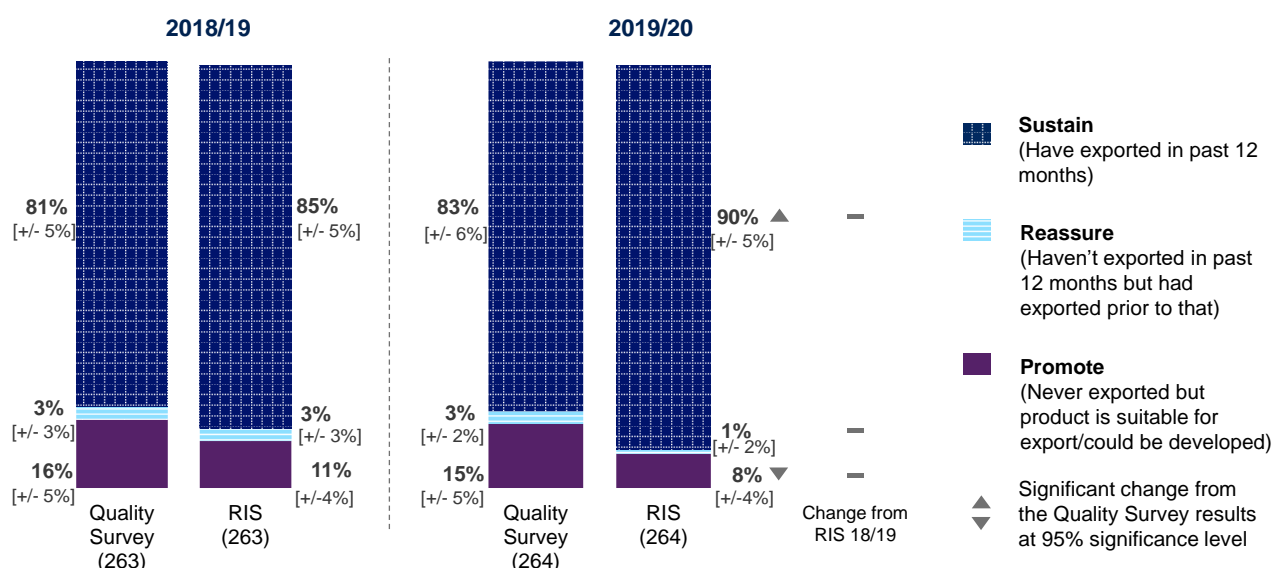
³¹ Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Three per cent that used Posts fell into this segment at the time they accessed the service, compared with one per cent 12 months later. This change is not statistically significant.

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. More than one in ten (15%) that used Posts were in this segment at the time they accessed the service. This decreased 12 months later to eight per cent.

There were no significant changes over time when comparing results from the two RIS surveys (2018/19 and 2019/20).

Chart 3.2.4 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) - Posts³²



Source: Composite measure merging data from several variables
 Base: All respondents who used Posts and completed RIS: Quality Survey/ RIS
 2018/19 (263/263)
 2019/20 (264/264)

The export status of some businesses changed between the time the business accessed the service and 12 months later in the RIS survey (Table 3.2.1).

Overall, eight per cent of businesses reported that they had moved from Promote to Sustain, that is moved from having never exported, to having exported in the past 12 months. Two per cent of businesses reported that they had moved from Sustain to Promote.

This pattern has not changed significantly from the last RIS in 2018/19.

³² Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote.

Table 3.2.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Posts

Quality Survey Reported Export status	Reported Impact Survey Reported Export Status	Percentage	Change ³³
Sustain, 227 businesses	Sustain, n=221	97% [+/- 3%]	-

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

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

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

Of the 90% of businesses that exported (243 businesses), 83% reported that they had won any new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service.

Of the 90% of businesses that exported, three in four (78%) of these exporting businesses reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.2.5). Specifically, 13% had won one overseas contract, with three in ten (31%) winning between two and five. Around one in seven (14%) businesses had won more than fifteen overseas contracts (Chart 3.2.5).

The median number of contracts won among exporting businesses that used Posts was three (this is taken from the 90% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

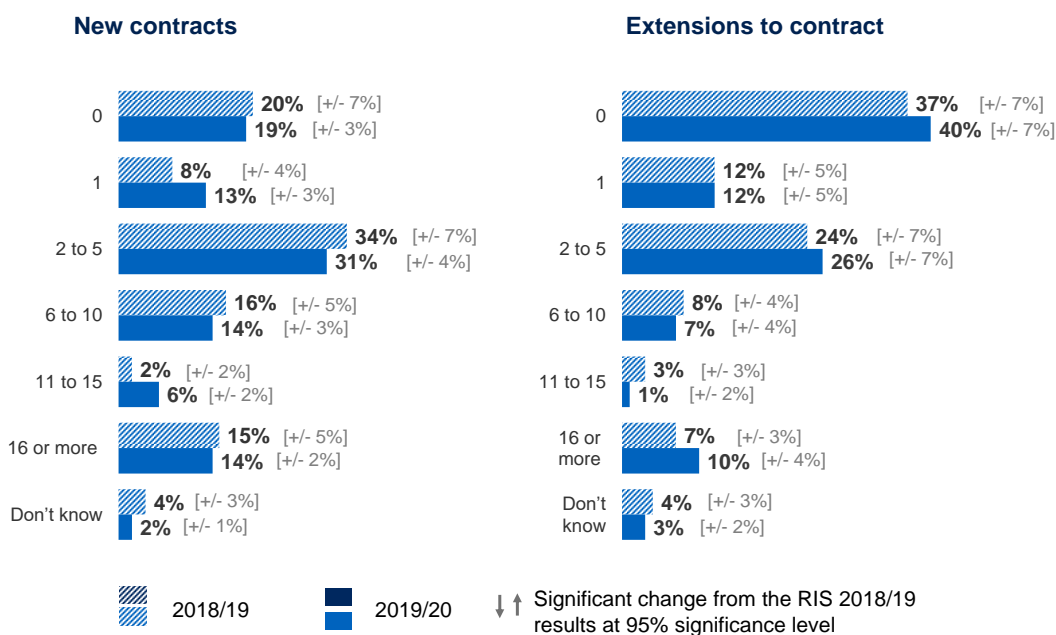
More than half (56%) of exporting businesses that used Posts reported they had gained extensions to existing overseas business contracts in the year since they used the service. Around one in ten (12%) extended one, and one in four (26%) extended between two and five. One in ten (10%) extended more than fifteen existing overseas sales contracts. Four in ten (40%) businesses had not extended any existing contracts (Chart 3.2.5).

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

There were no significant changes for these findings since the 2018/19 RIS.

³³ Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

Chart 3.2.5 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contracts made in previous 12 months - Posts³⁴



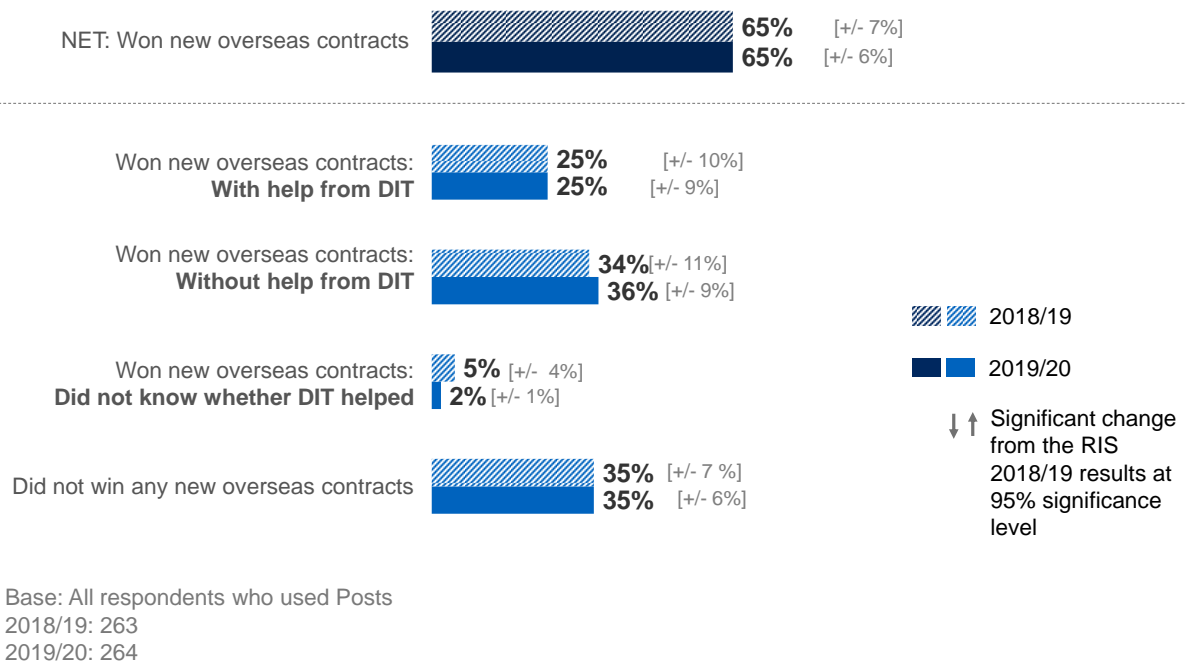
Q_Newcontract- Firstly, how many new overseas business contracts for export sales did you win in the past year?
 Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
 Base: All respondents who used Posts and were currently selling, or had previously sold, goods or services overseas in the previous 12 months
 (2018/19: 229)
 (2019/20: 243)

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

Looking at all businesses that used Posts (including those that were not currently exporting and those that did not win any contracts or contract extensions), a quarter (25%) said they won contracts with the assistance of Posts or DIT³⁵, around a third (36%) won one or more contracts without the assistance of DIT and two per cent were unsure.

Chart 3.2.6 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – Posts

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



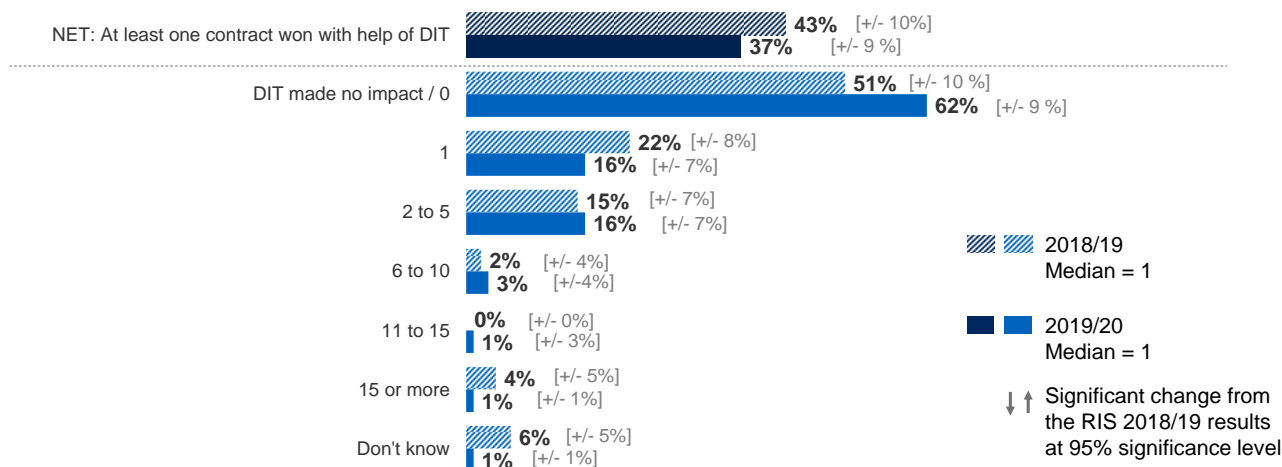
The section below **only includes results for 156 businesses, that is 64% of the businesses that were interviewed. These are businesses that both exported, won at least one new contract in the 12 months since they accessed the Posts service, and could estimate the number of contracts won with the assistance of Posts or DIT** - this includes businesses that said DIT made no impact on the number and value of new overseas business contracts they won. The remaining 36% of businesses interviewed did not meet these criteria and therefore were not asked the following questions.

The median number of contracts that DIT helped win (including those that reported 0) was one, for current exporters that used Posts. This was the same as in the 2018/19 RIS.

Businesses who won at least one new contract were asked how many of these were won with the help of DIT in the last 12 months. As shown in Chart 3.2.7 below, around six in ten businesses (62%) said they won no new overseas sales contracts with the help of DIT, or DIT made no impact. One in six (16%) had won one new overseas sales contract, and the same proportion (16%) had won between two and five. Five per cent had won more than five overseas sales contracts due to DIT support.

There were no significant changes since the 2018/19 RIS.

Chart 3.2.7 Number of new overseas contracts that said to be won with the help of DIT in the last 12 months (including all those who said DIT made no impact) - Posts



Q_ContractDIT - Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?
 Q_ContractNumber-How many new overseas contracts were won with help from DIT
 Base: All respondents who used Posts and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months
 2018/19: 124
 2019/20: 156

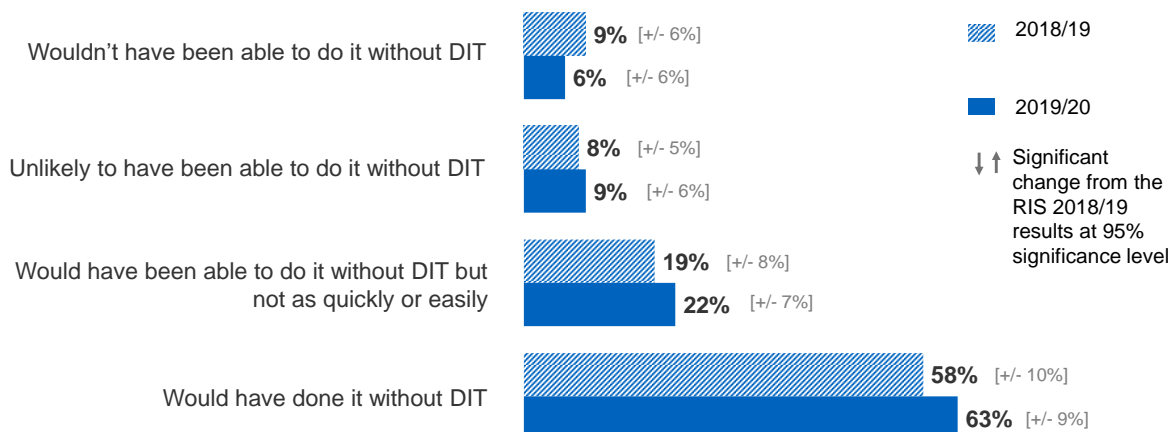
Importance of DIT’s support in winning overseas contracts - Posts

The 64% of businesses that exported, won at least one new contract in the 12 months since they accessed the Posts service and could estimate the number of contracts won with the assistance of Posts or DIT (excluding those that answered ‘don’t know’) were asked how important this help was. To understand the support the service provided for this analysis, **exporting businesses who said that DIT made no impact / did not help them win any new contracts were not asked this question directly but have been included in the ‘would have done it without DIT’ code below.**

Around a third (36%) of these businesses reported that DIT was important in helping them win these contracts. Six per cent of those who won at least one new overseas contract said they would not have been able to do it without DIT, while around one in ten (9%) thought it was unlikely they could have done it without DIT. A further 22% thought they would not have been able to do it as quickly or easily without DIT (Chart 3.2.8). The remaining 63% thought they would have been able to achieve the same outcome without DIT support.

There were no significant changes since the 2018/19 RIS.

Chart 3.2.8 How important DIT's help was in winning overseas contracts - Posts



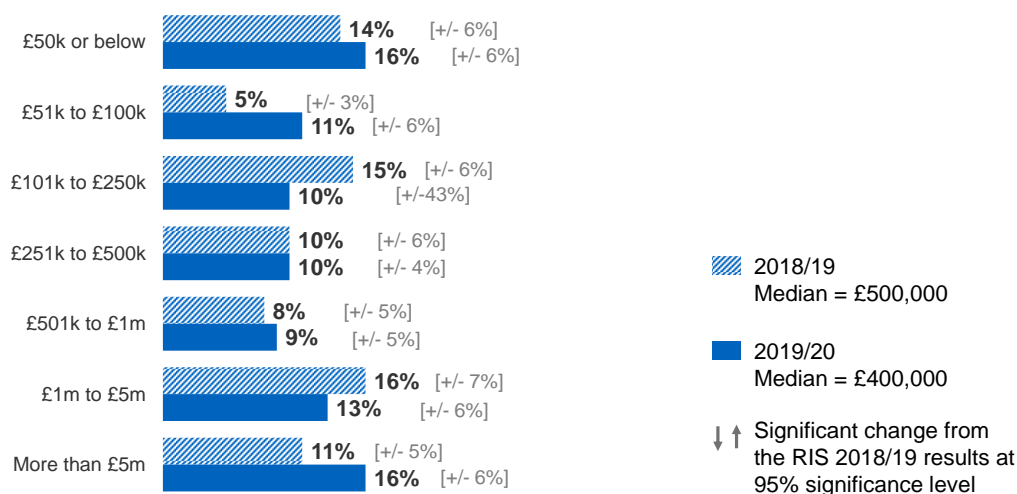
QContractHelp – How important was DIT's help in winning these overseas contracts?
 Base: All Posts respondents who won any new overseas contracts in the past year
 2018/19: 124
 2019/20: 156

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

Reported value of the export sales of new contracts - Posts

The 78% of businesses that reported winning any new overseas contracts (excluding extensions to existing contracts) were also asked the value of the export sales of those contracts in total (Chart 3.2.9). The median value of the export sales of all new overseas contracts for these businesses was £400,000. One in six (16%) won contracts with export sales value of £50,000 or below. Around three in ten (29%) said that the export sales of the new overseas contracts won was worth more than £1 million. These figures have remained unchanged since the 2018/19 RIS.

Chart 3.2.9 Value of all new overseas contracts made in previous 12 months - Posts



QcontractValue – What is the value of all these new overseas business contracts for export sales?

Base: All respondents who used Posts and won any new overseas sales contracts

2018/19: 171

2019/20: 187

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

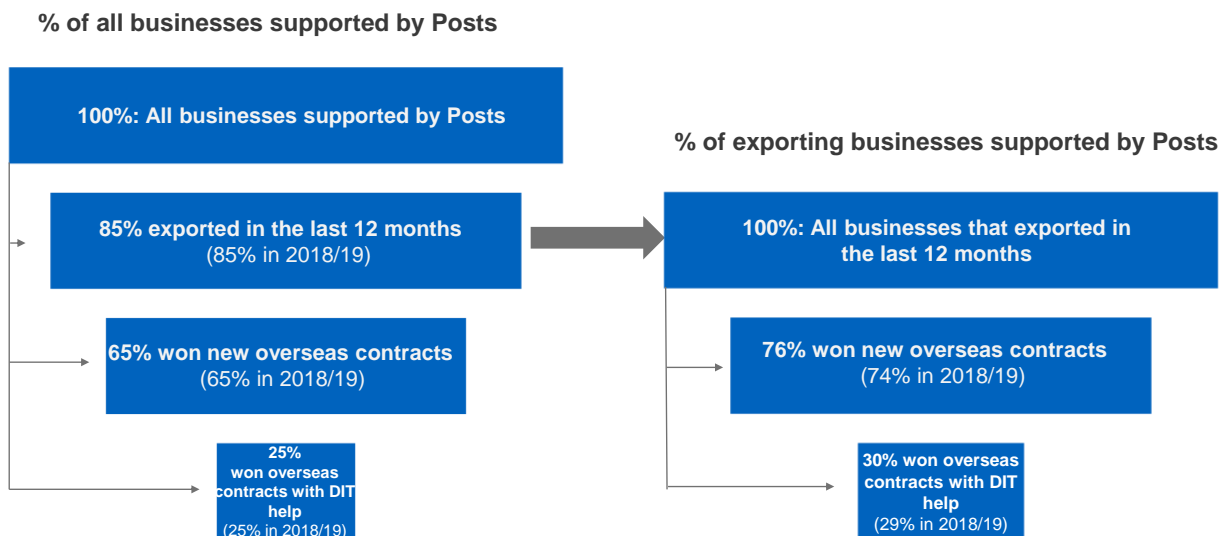
This section summarises the analysis on reported additional impact, which aims to estimate the additional impact that DIT services had on businesses, where this impact would not have happened without DIT’s support.

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

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this³⁶.

³⁶ The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

Chart 3.2.10 Summary of businesses supported by Posts³⁷



Median value of export sales per contract that DIT helped businesses win: **£50,000** (£50,000 in 2018/19)

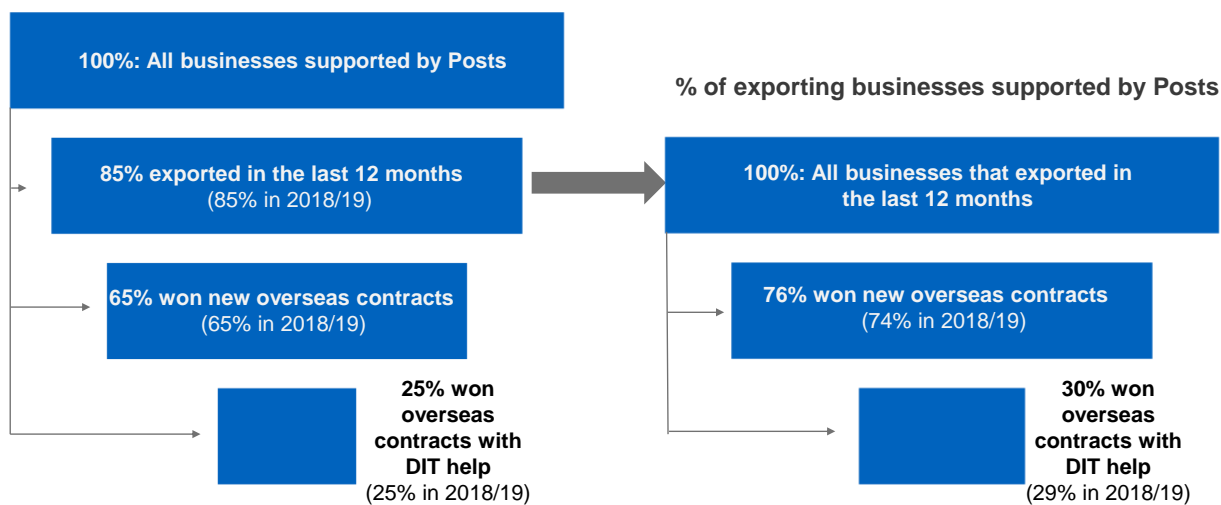
Median value of export sales won per business with DIT support: **£100,000** (£100,000 in 2018/19)

Base: All respondents who used Posts
 2018/19: 263
 2019/20: 264

↓ ↑ Significant change from the RIS 2018/19 results at 95% significance level

³⁷ In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 39% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so $39\% * 65\% = 25\%$. Find more information about how this was calculated in the technical report.

% of all businesses supported by Posts



Median value of export sales per contract that DIT helped businesses win: **£50,000** (£50,000 in 2018/19)

Median value of export sales won per business with DIT support: **£100,000** (£100,000 in 2018/19)

Base: All respondents who used Posts
 2018/19: 263
 2019/20: 264

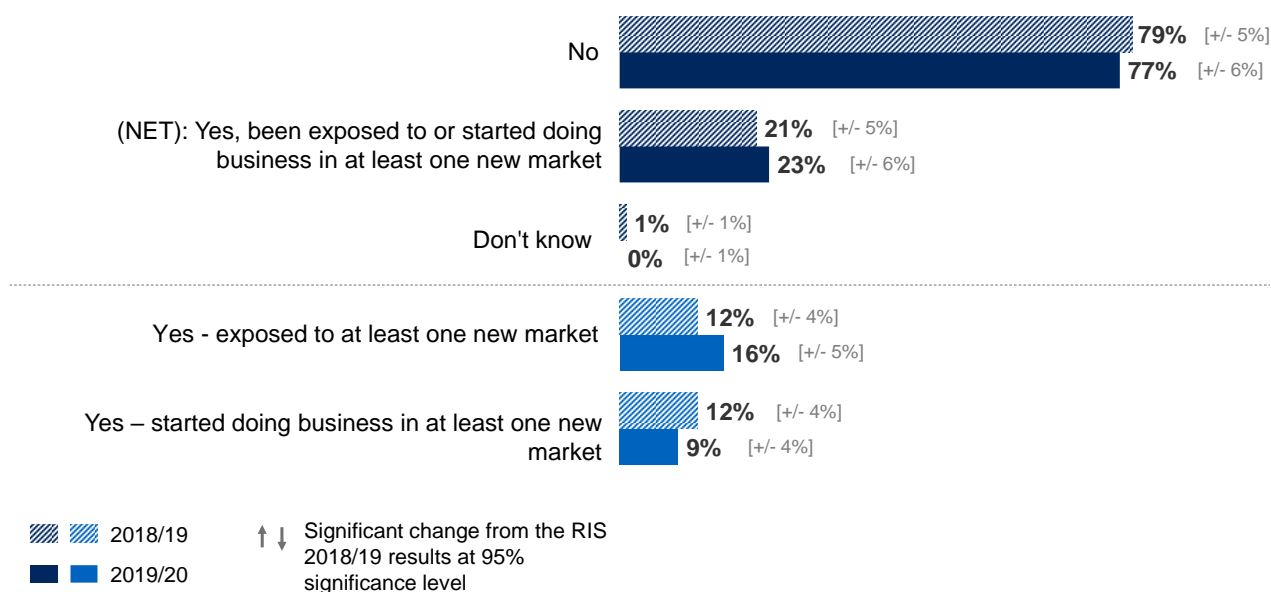
↓ ↑ Significant change from the RIS 2018/19 results at 95% significance level

3.2.7. Exposure and growth within new markets: Posts

All businesses that used Posts were asked whether they received increased exposure or started doing business in any new markets because they accessed the Posts service³⁸. One in six (16%) had been exposed to at least one new market and around one in ten (9%) had started doing business in at least one new market as a result of using the Posts service. These figures remain unchanged since the 2018/19 RIS.

³⁸ Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

Chart 3.2.11 Whether increased exposure or starting business in a new overseas market - Posts



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SAMPLED SERVICE]? Base: All respondents who used Posts
 2018/19: 263
 2019/20: 264

3.2.8. Barriers to exporting: Posts

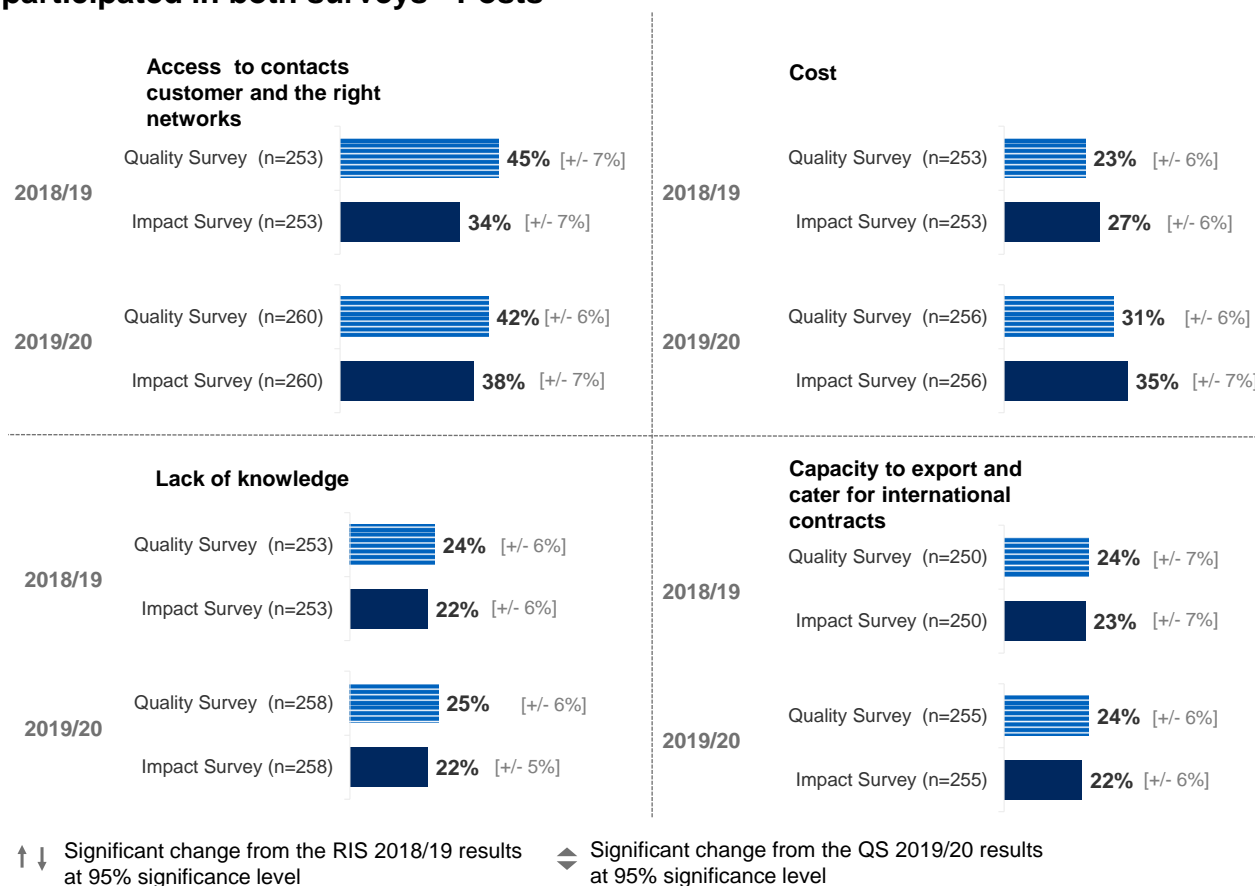
Businesses were asked in both the Quality Survey and Reported Impact Survey about some **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all). This section compares results for businesses who completed both surveys and provided a response to this question in both surveys³⁹.

Businesses were most likely to say that ‘access to contacts, customers and the right networks’ (38%) and ‘cost’ (35%) were barriers to exporting.

When comparing results with the 2018/19 RIS, there were no significant changes in the proportions reporting the various barriers to exporting (Chart 3.2.12). There was also no change when comparing the results with the 2019/20 Quality Survey.

³⁹ Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.2.12 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys - Posts⁴⁰



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

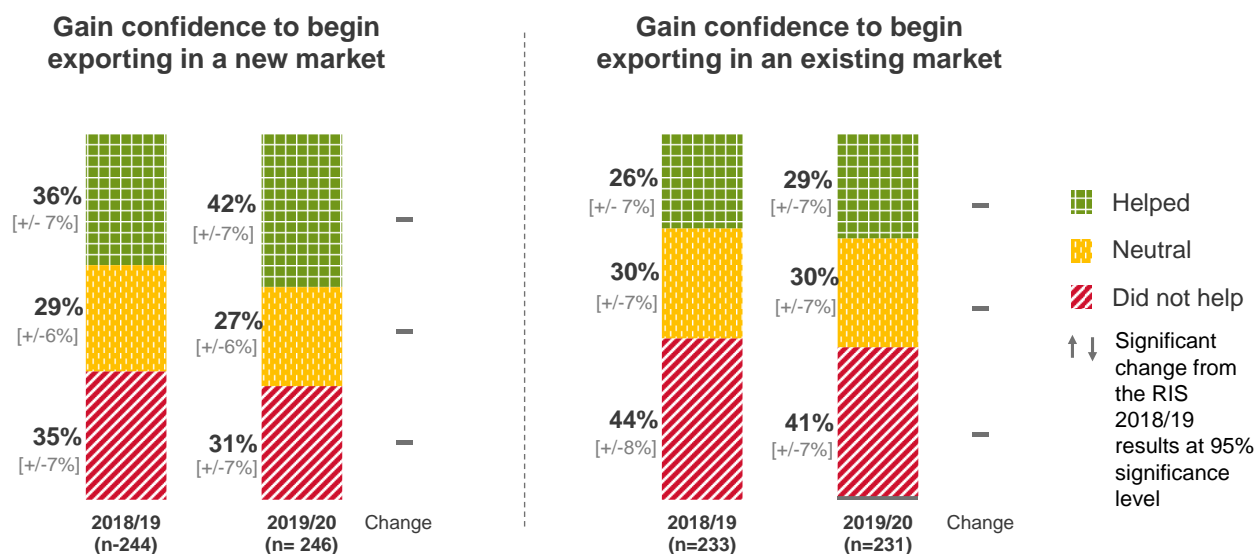
3.2.9. Wider benefits of service: Posts

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market, using a similar rating scale as above. Businesses were more likely to have said that using Posts helped them gain confidence to begin exporting in a new market (42%) than that it did not help them (31%). However, businesses were less likely to say that using Posts helped them gain confidence to increase exporting in an existing market (29%) than that it did not help them (41%).

There were no significant changes from the 2018/19 RIS.

⁴⁰ The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Chart 3.2.13 To what extent experience of the service helped to build confidence in exporting – Posts



QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of [SAMPLED SERVICE] help you to...?

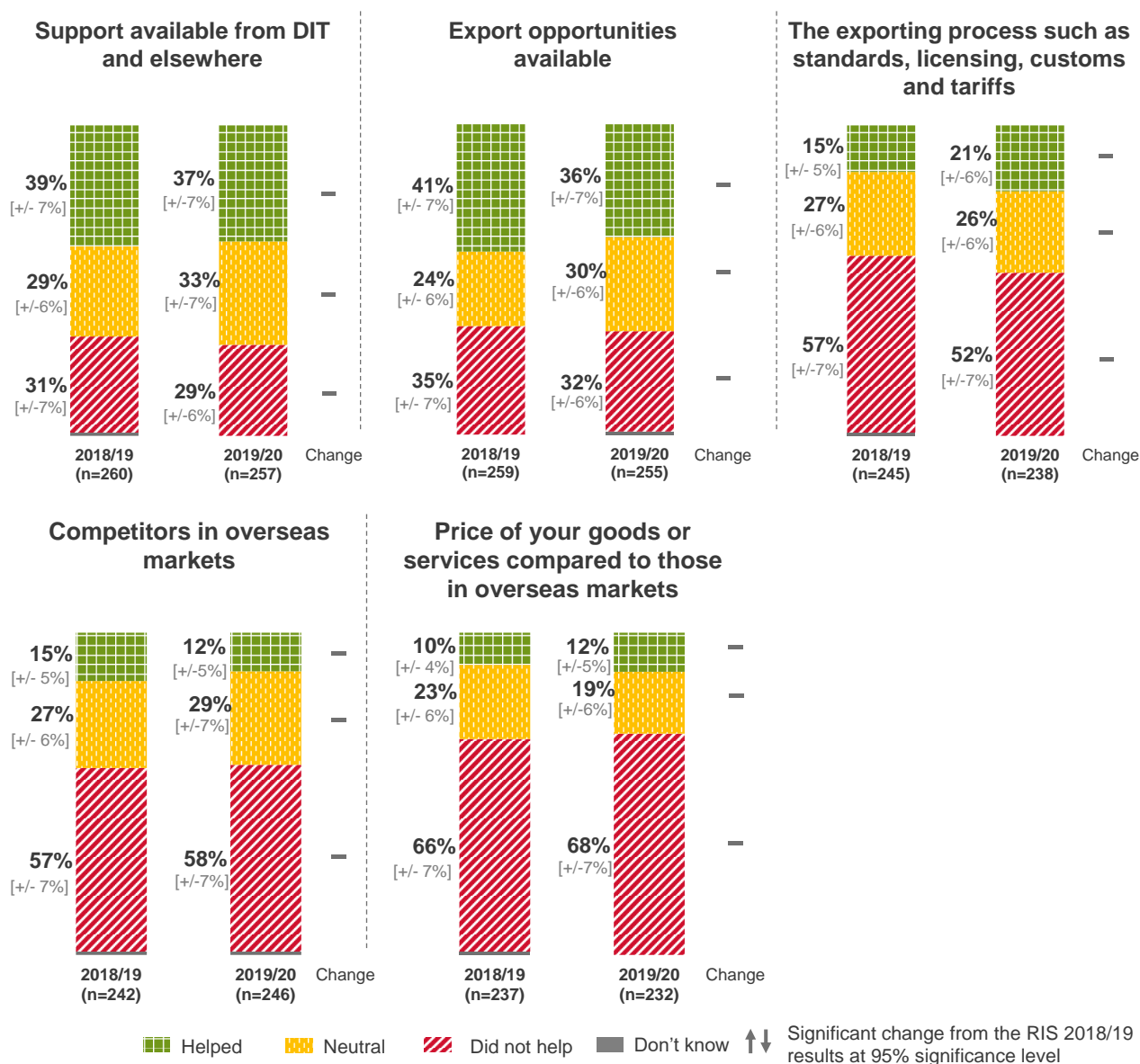
Base: All respondents who used Posts except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from 10 (helped a lot) to 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.2.14 shows the items that were asked of businesses that used Posts. This shows that:

- Around a third (37%) of businesses that had used Posts said that the service helped them by increasing their knowledge of the support available from DIT and elsewhere, while three in ten (29%) said the service did not help them in this way.
- Around a third of businesses that had used Posts (36%) said that the service had helped them to increase their knowledge of the export opportunities available, while a similar proportion (32%) said they were not helped in this way.
- One in five (21%) businesses that had used Posts said it improved their knowledge of the exporting process, while half (52%) said the service did not help them in this way.
- Smaller proportions said that using Posts improved their knowledge of the price of goods compared with those in overseas markets (12%) or competitors in overseas markets (12%).

There were no significant changes from the 2018/19 RIS.

Chart 3.2.14 To what extent the business felt it has improved its knowledge as a result of using the service – Posts



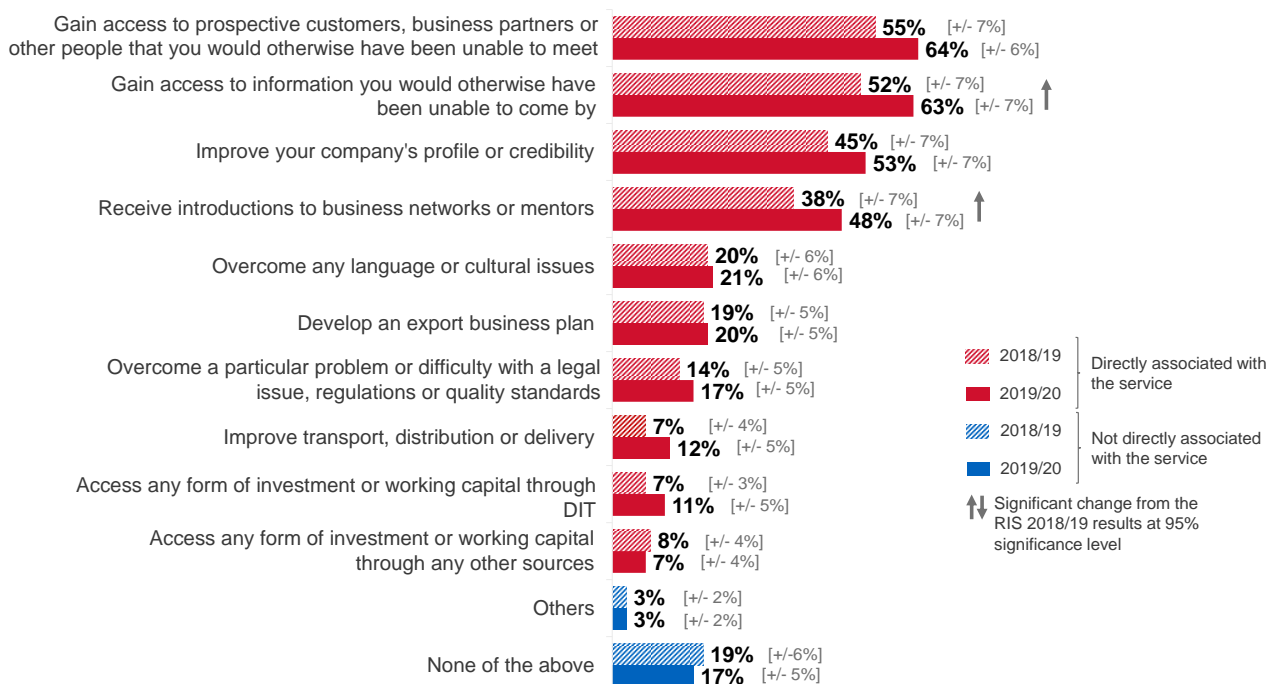
QlImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of [SAMPLED SERVICE]? Base: All respondents who used TAP except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using Posts in the year between dealing with the Posts and the RIS interview. A detailed breakdown of responses is shown in Chart 3.2.15, where activities in red show those most closely associated with the service.

The most frequent responses from a pre-coded list were to gain access to prospective customers (64%) and to gain access to information they would otherwise have been unable to come by (63%). Around half improved the company's profile or credibility (53%) or received introductions to business networks (48%). One in five overcame any language or cultural issues (21%) or developed an export business plan (20%), while one in six overcame problems with a legal issue, regulation or quality standards (17%).

There has been an increase since the 2018/19 RIS in the proportion that had gained access to information they would otherwise have been unable to come by, from 52% to 63%. There has also been an increase in the proportion that received introductions to business networks, from 38% to 48%.

Chart 3.2.15 In what ways has the business felt it had benefited from DIT support - Posts ⁴¹



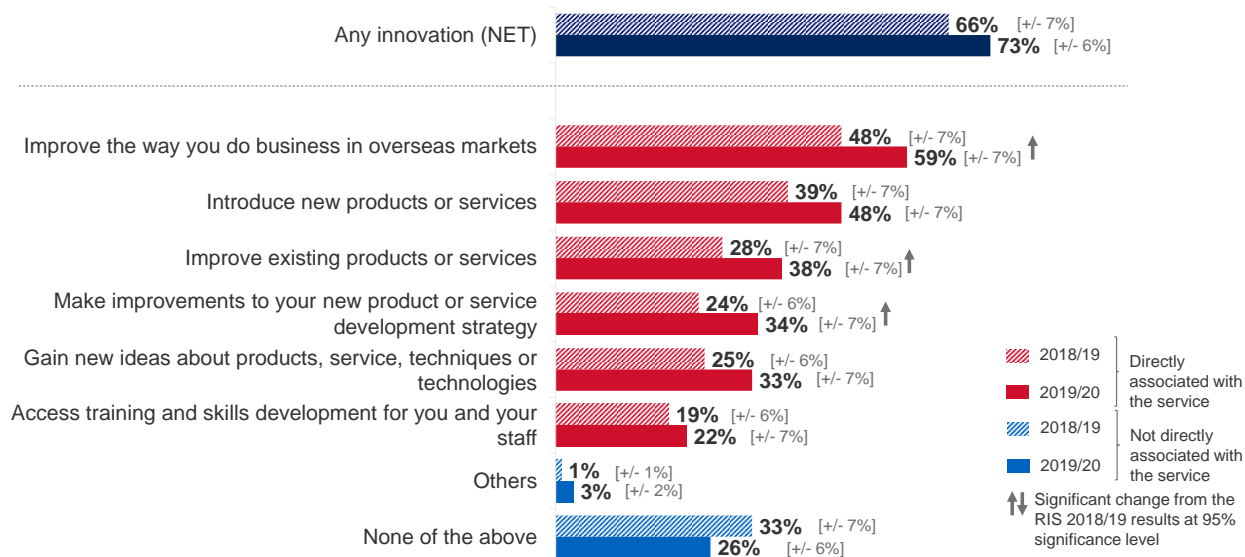
QServiceBenefit – In which of the following ways if any, has your business benefited specifically from [SAMPLED SERVICE] over the last year?
 Base: All respondents who used Posts
 2018/19: 263
 2019/20: 264

Businesses were asked whether using Posts had helped, or will help, support innovation and development as a business. Over seven in ten (73%) said that using the service helped them with innovation or development in some form. Answer codes shown in red were most closely associated with the service. The most frequent response was to 'improve the way you do business overseas' (59%). Around half (48%) said that using the Posts service helped them to introduce new products or services, while a third or more said it helped them to improve their existing products or services (38%), make improvements to their new product or service development strategy (34%) or gain new ideas about products or services (33%).

Comparing results with the 2018/19 RIS, the proportions reporting three of the items have increased: 'improve the way you do business overseas' (from 48% to 59%), improve existing products or services (from 28% to 38%) and make improvements to new product or service development strategy (from 24% to 34%).

⁴¹ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.2.16 Whether the service has / will help innovation and development - Posts
42 43



QInnovationSupport – Still thinking of [SAMPLED SERICE], has this service helped or do you expect it to help your business with development and/or innovation? Specifically...
 Base: All respondents who used Posts
 2018/19: 263
 2019/20: 264

International contacts

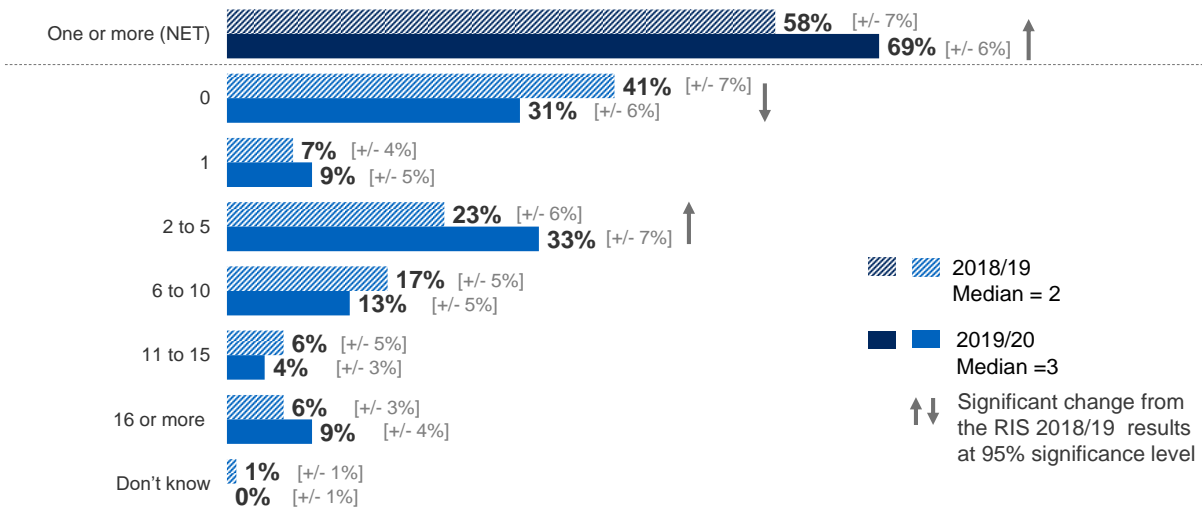
Businesses were asked how many overseas contacts they had made as a result of using Posts over the past year (Chart 3.2.17). Around seven in ten (69%) businesses made at least one new overseas contact in the year since using the Posts service. Nine per cent made one new overseas contact, and a third (33%) made between two and five new contacts. Just over one in ten (13%) businesses made between six and ten new overseas contacts, and the same proportion (13%) made more than ten new contacts. Around three in ten (31%) reported that they had not made any new contacts as a result of using the Posts service.

There has been an increase since the 2018/19 RIS in the proportion that made at least one new overseas contact in the year since using the Posts service, from 58% to 69%. There was also a statistically significant increase in the proportion that made between two and five new contacts, from 23% to 33%.

⁴² The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.

⁴³ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.2.17 Number of new overseas contacts made in previous 12 months – Posts



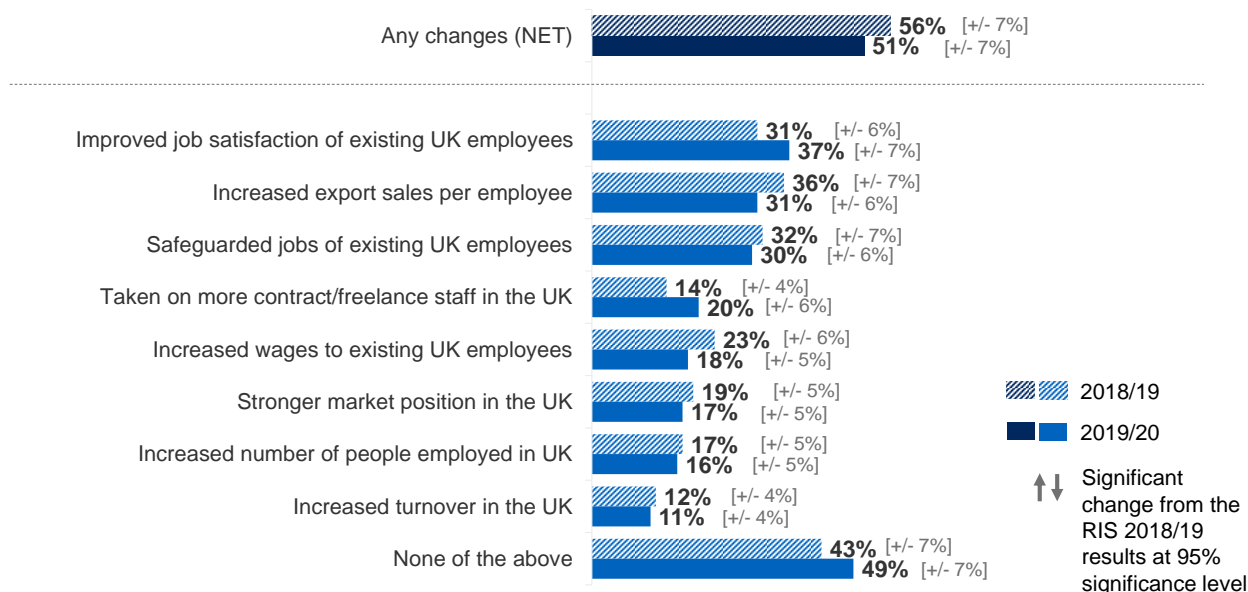
Q_ContactsMade –How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
 Base: All respondents who used Posts
 2018/19: 263
 2019/20: 264

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Posts service (Chart 3.2.18). Just over a third of businesses (37%) said they thought using the Posts service had, or would, improve job satisfaction of existing UK employees, while around a third said they thought using Posts had, or would, increase export sales per employee (31%) or safeguard jobs in the UK (30%).

Around one in five (20%) had taken on more contract or freelance staff in the UK, while a similar proportion had increased wages to existing UK employees (18%), achieved a stronger market position in the UK (17%) or had increased the number of their UK employees (16%).

There were no significant changes since the 2018/19 RIS.

Chart 3.2.18 Changes expected / seen in the UK business as a result of receiving the service - Posts ⁴⁴



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
 Base: All respondents who used Posts
 2018/19: 263
 2019/20: 264

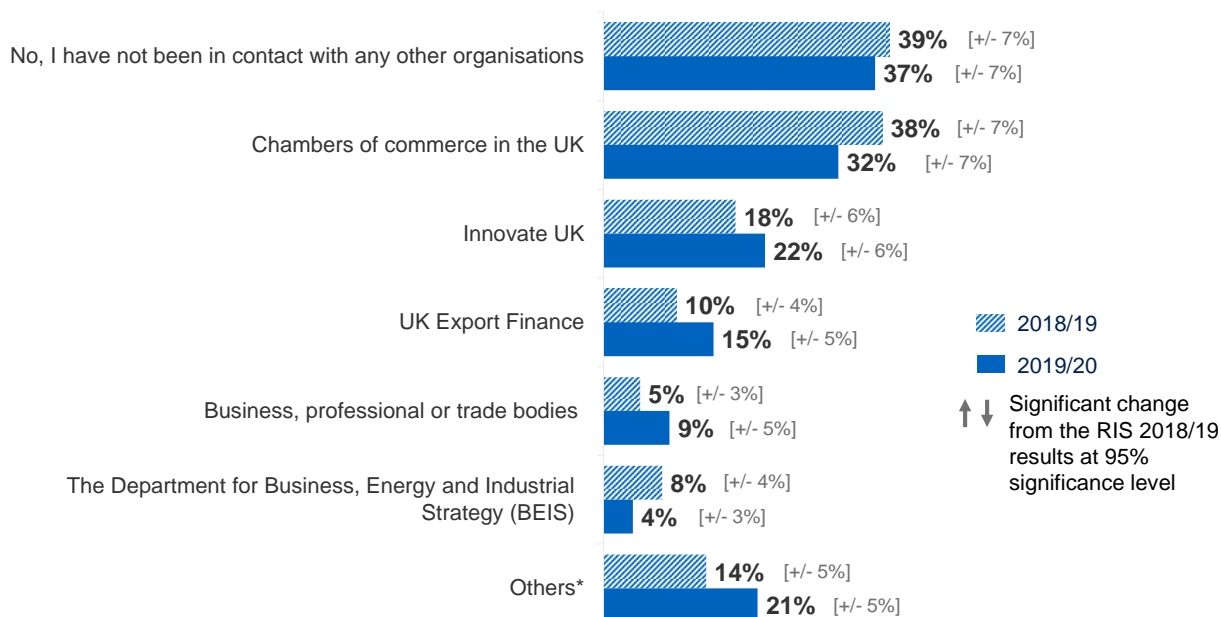
3.2.10. Actions taken as a result of the service: Posts

Businesses were asked what organisations they had been in contact with since using Posts. Around a third (32%) of businesses had been in contact with the British Chambers of Commerce and around two in ten (22%) had been in contact with Innovate UK. Businesses also reported contact with UK Export Finance (15%) or business, professional or trade bodies (9%). Around a third (37%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

There were no significant changes since the 2018/19 RIS.

⁴⁴ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.2.19 What organisations respondents have been in contact with since receiving the service - Posts⁴⁵



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

Base: All respondents who used Posts

2018/19: 263

2019/20: 264

*Other services include 'Devolved administrations' (2%), 'Overseas administrations' (2%), 'Local Enterprise Partnerships' (2%), 'Private consultants or advisors' (2%), 'Friends/colleagues' (2%), 'Online / Google' (2%), 'Banks' (1%), 'Any other lenders' (2%) and any others.

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

3.3. Webinars

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

3.3.1. Webinars: Quality survey summary

These findings are based on interviews with 133 businesses who used the Webinars service from April 2019 to March 2020 and participated in both the Quality Survey and Reported Impact Survey (RIS).

Key measures and results from the Quality Survey are detailed below for all businesses that participated in the Quality Survey (n=423), as an overview of businesses' experience of using Webinars.

In the Quality Survey, businesses were asked: based on their experiences of the sampled service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own⁴⁶. Around two in five (43%) were 'Promoters' of Webinars (score of 9-10), while one in four (24%) were 'Detractors' (score of 0-6) and 30% were neutral (score of 7-8). **Overall, Webinars had an NPS of 19.**

Businesses were also asked in the Quality Survey to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from 0 (very dissatisfied) to 10 (very satisfied)⁴⁷.

Overall, **three in four (74%) businesses were satisfied with their experience of Webinars** (rating of 7 or more out of 10), and this included around one in four businesses (24%) who gave a 'very satisfied' rating (10 out of 10). The figures for NPS and satisfaction with the service remain unchanged since 2018/19.

⁴⁶ Businesses answered this question on a scale from 10 (extremely likely) to 0 (not at all likely). This is commonly known as Net Promoter Score (NPS) and splits responses of nine or ten into 'Promoters', six or below into 'Detractors' and those with scores of 7 or 8 as neutral. NPS is calculated as the difference between the percentage of Promoters and Detractors.

⁴⁷ Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

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

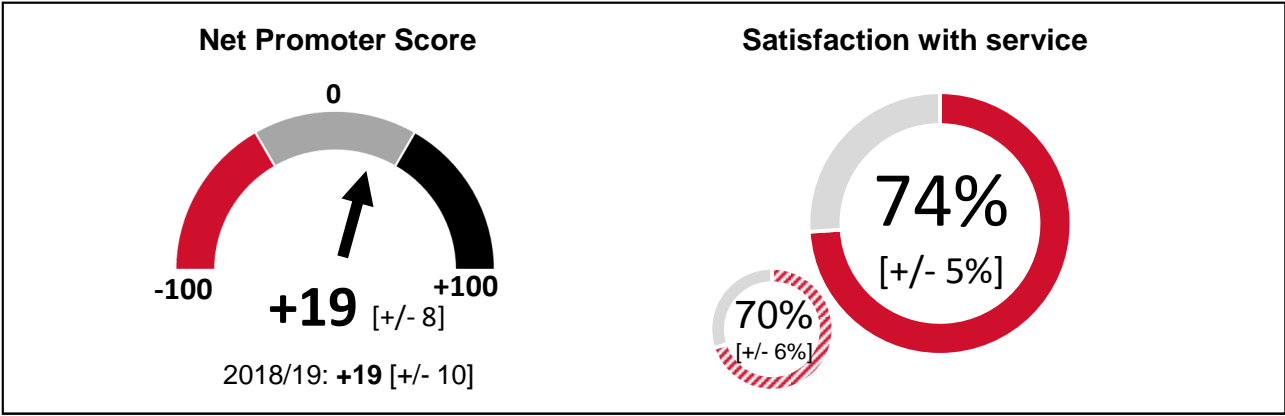


Chart 3.3.2 Key indicators from the RIS survey – Webinars

Summary page – Webinars

QS: Quality Survey
 RIS: Reported Impact Survey

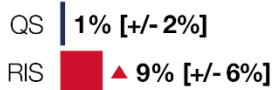
Export Status

Sustain (current exporters)



Reassure

(exported before but not in last 12 months)



Promote (not exported before)



Base: All businesses using Webinars (n=133)

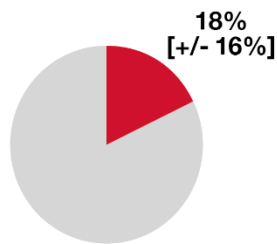
Segment movement from Promote

Due to low numbers (n=17) this chart has been suppressed

DIT impact on contracts

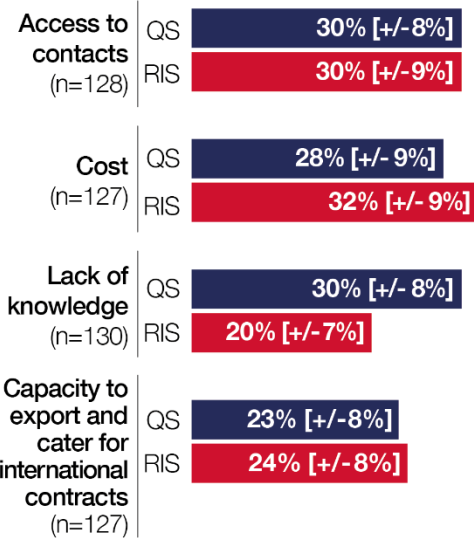
Businesses that won export contracts because of help from DIT


Base: All businesses using Webinars (n=133)




Due to low numbers (n=17) this chart has been suppressed

Reported barriers to exporting in QS and RIS

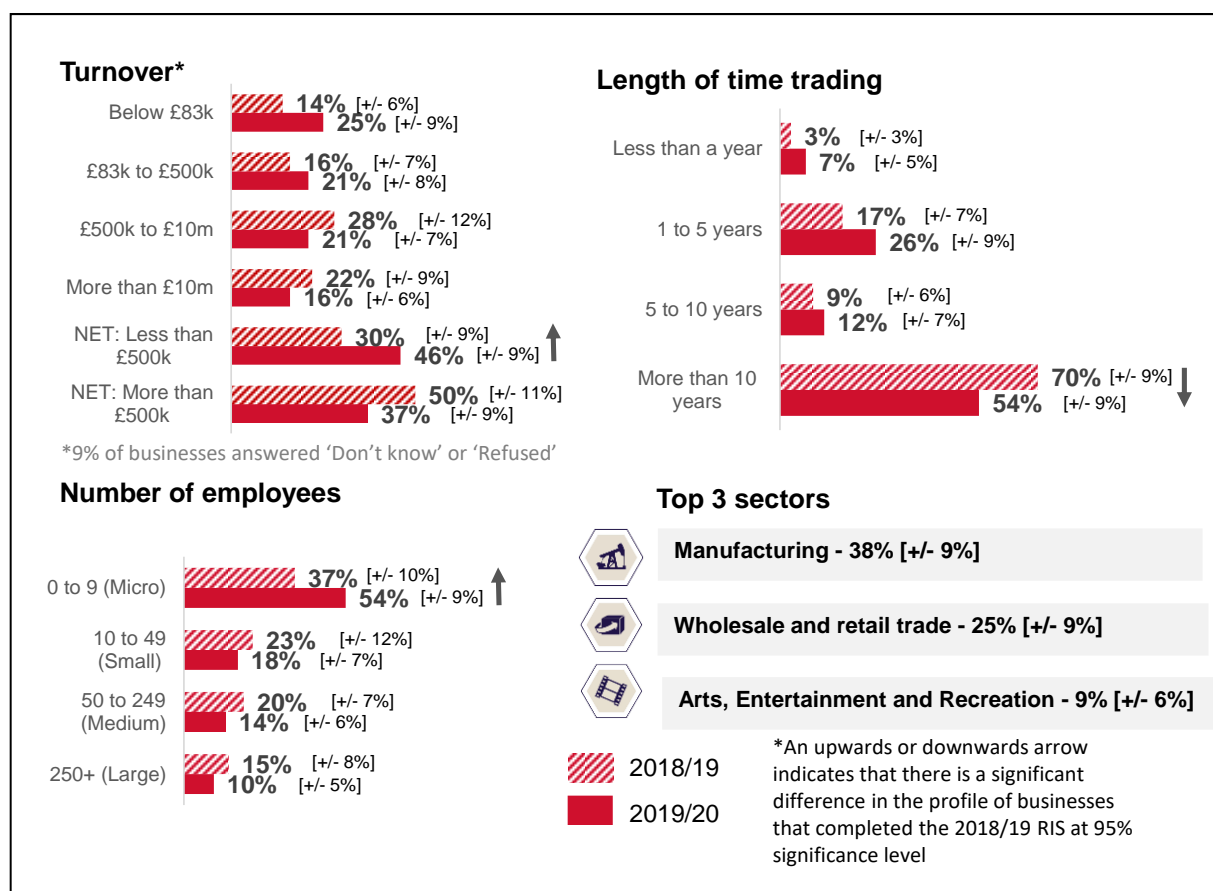


 Significant change from Quality Survey results at the 95% significance level

 Significant percentage point (pp) change from 18/19 Reported Impact Survey results at the 95% significance level

3.3.2. Profile of RIS survey respondents: Webinars

Chart 3.3.3 Profile of RIS Survey Respondents⁴⁸ - Webinars



Reported Impact on exporting

3.3.3. Webinars

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

Sustain: refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around eight in ten businesses (83%) that used Webinars fell into this segment at the time they accessed the service, compared with 80% 12 months later. This change is not statistically significant.

Reassure: refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. One per cent that used

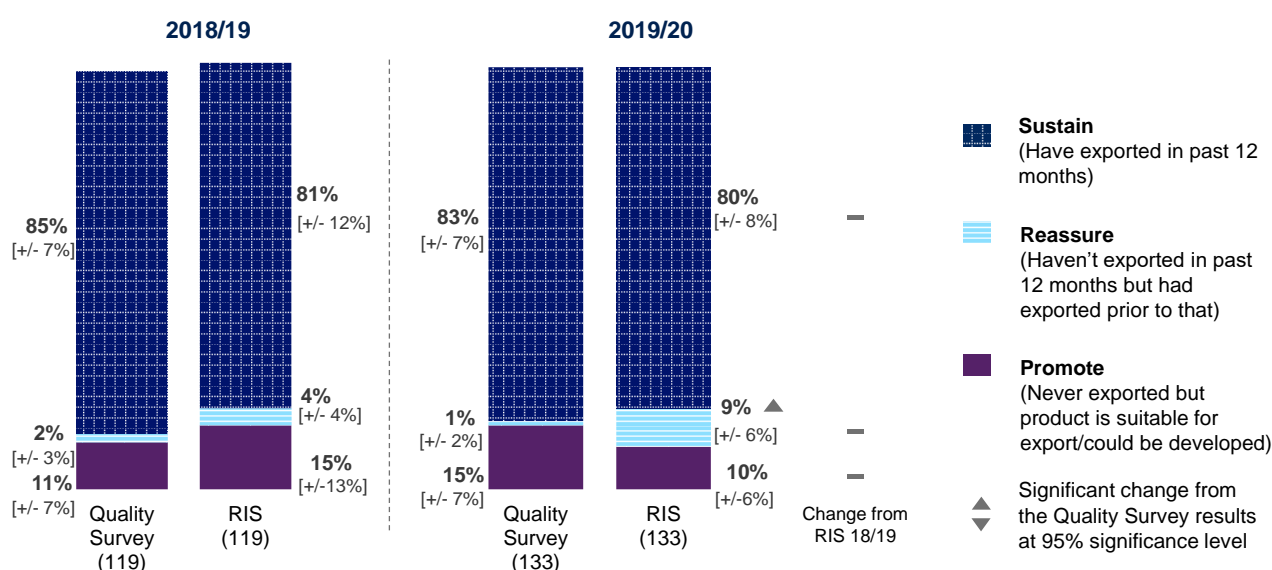
⁴⁸ Figures in this chart are based on answers given at the Quality Survey. This allows a direct comparison between the profile of businesses taking part in the Quality survey and in the RIS.

Webinars fell into this segment at the time they accessed the service, and this increased to nine per cent 12 months later.

Promote: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. More than one in ten (15%) that used Webinars were in this segment at the time they accessed the service, compared with 10% 12 months later. This change is not statistically significant.

There were no significant changes over time when comparing results from the two RIS surveys (2018/19 and 2019/20).

Chart 3.3.4 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) - Webinars⁴⁹



Source: Composite measure merging data from several variables
 Base : All respondents who used Webinars and completed RIS: Quality Survey/ RIS
 2018/19 (119/119)
 2019/20 (133/133)

The export status of some businesses changed between the time they accessed the service and 12 months later in the RIS survey.

Overall, four per cent of businesses reported that they had moved from Promote to Sustain, that is moved from having never exported, to having exported in the past 12 months. Seven per cent of businesses reported that they had moved from Sustain to Reassure, that is moving from being current or recent exporters to becoming 'lapsed or intermittent' exporters.

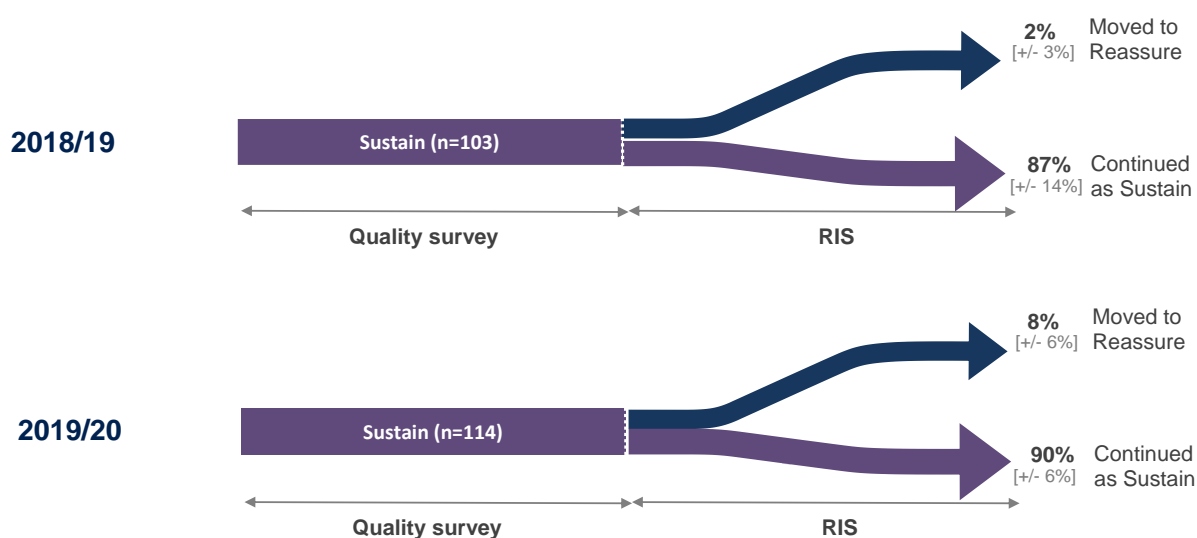
This pattern has not changed significantly from the last RIS in 2018/19.

⁴⁹ Change in export status may contain some inconsistencies due to respondent error. This includes for businesses that have moved from Sustain to Promote, Promote to Reassure, and Reassure to Promote.

Looking specifically at businesses that were in the Sustain segment (current or recent exporters) at the time of the Quality Survey (114 businesses), 90% reported that they had continued in Sustain, whilst eight per cent reported that they had moved to Reassure (previously exported but have not done so in the past 12 months) and two per cent said they had moved to Promote (Chart 3.3.5)⁵⁰. Results should be treated with caution due to low base sizes. Movement from the Promote segment has not been included in Chart 3.3.5 due to low base sizes.

These movements were broadly consistent with those reported in the 2018/19 RIS. Changes are not statistically significant.

Chart 3.3.5 Exporter status reported at time of the service delivery (Quality Survey) and 12 months later (RIS) [rebased] – Webinars



Source: Composite measure merging data from several variables
 Base: All Webinars respondents who were in the Sustain segment in the Quality Survey and completed RIS
 2018/19: 103
 2019/20: 114

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

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

Of the 81% of businesses that exported (109 businesses), 72% reported that they had won any new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service.

⁵⁰ Of the businesses that were in the Sustain segment at the time of the Quality Survey, two per cent reported that they had moved to Promote. This movement is likely to be caused by respondent error when completing the survey.

Of the 81% of businesses that exported, two-thirds (66%) of these exporting businesses reported that they had won any new overseas business contracts in the year since they used the service (Chart 3.3.6). Specifically, four per cent had won one overseas contract, with three in ten (29%) winning between two and five. Around one in ten (12%) businesses had won more than fifteen overseas contracts (Chart 3.3.6).

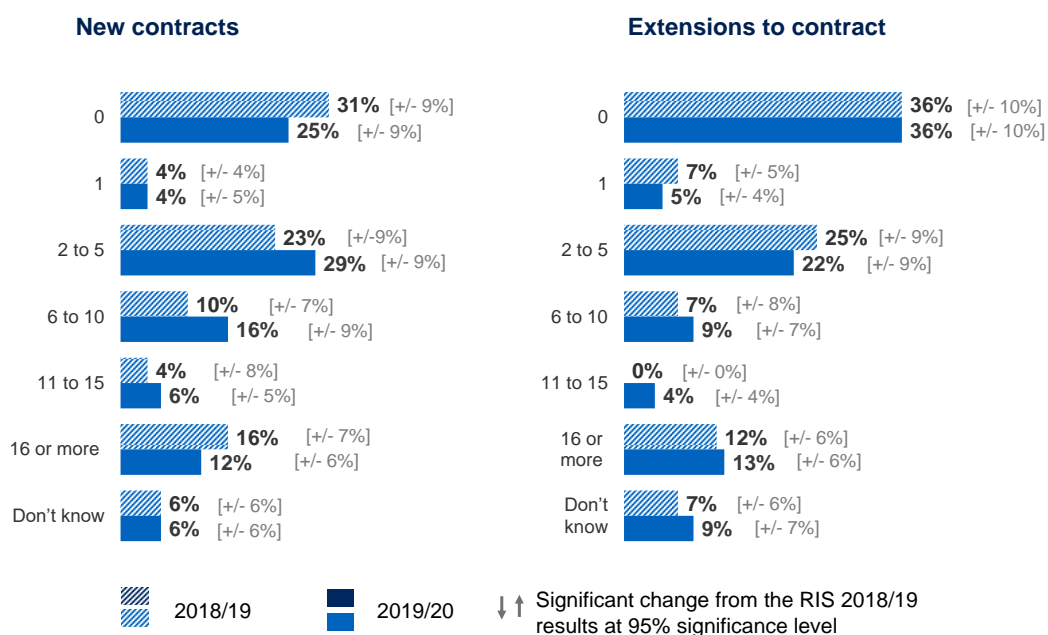
The median number of contracts won among exporting businesses that used Webinars was three (this is taken from the 81% that exported and could also provide a figure for the number of contracts won; this includes those who export but did not win any new contracts in the 12 months since they used the service).

Around half (53%) of exporting businesses that used Webinars reported they had gained extensions to existing overseas business contracts in the year since they used the service. Five per cent extended one, and around one in five (22%) extended between two and five. Just over one in ten (13%) extended more than fifteen existing overseas sales contracts. Around a third (36%) businesses had not extended any existing contracts (Chart 3.3.6).

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

There were no significant changes for these findings since the 2018/19 RIS.

Chart 3.3.6 Proportion of businesses that exported and reported they had made new overseas contracts and/or extended existing contracts and numbers of contracts made in previous 12 months - Webinars⁵¹



Q_Newcontract- Firstly, how many new overseas business contracts for export sales did you win in the past year?
 Q_Extendcontract - And how many extensions to existing overseas business contracts for export sales did you win in the past year?
 Base: All respondents who used Webinars and were currently selling, or had previously sold, goods or services overseas in the previous 12 months
 (2018/19: 104)
 (2019/20: 109)

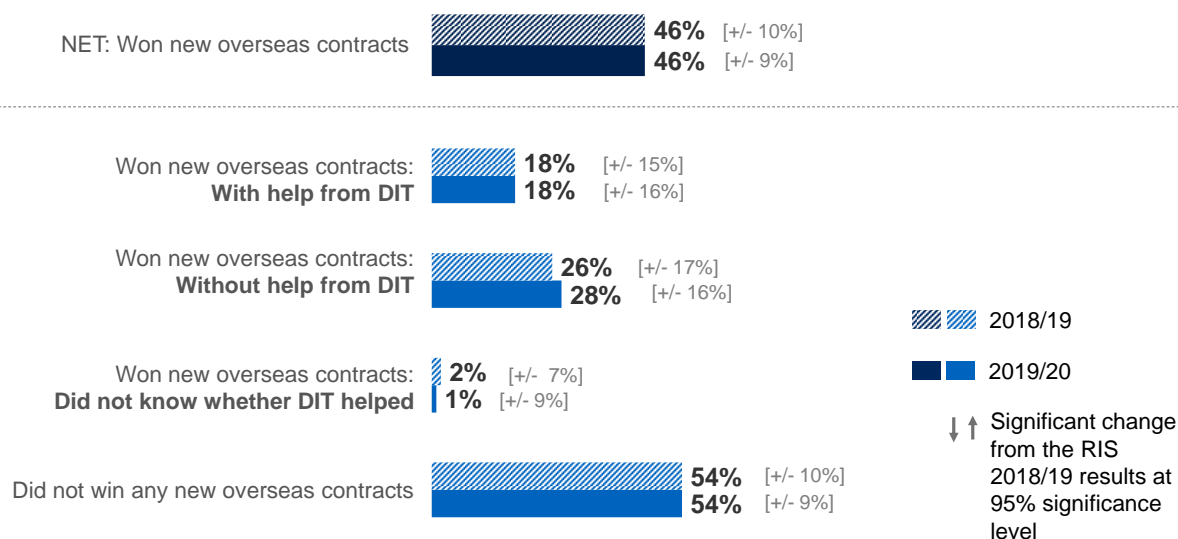
Reported additional contracts which were gained because of DIT support - Webinars

Looking at all businesses that used Webinars (including those that were not currently exporting and those that did not win any contracts or contract extensions), around one in five (18%) said they won contracts with the assistance of Webinars or DIT⁵², around one in four (28%) won one or more contracts without the assistance of DIT and one per cent were unsure.

⁵¹ The total percentage of all responses for this question add up to above 100 per cent because of rounding.

⁵² Please refer to the survey technical report for a more detailed explanation of this measure

Chart 3.3.7 Percentage of businesses that reported they won or did not win new overseas contracts with or without DIT support – Webinars



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

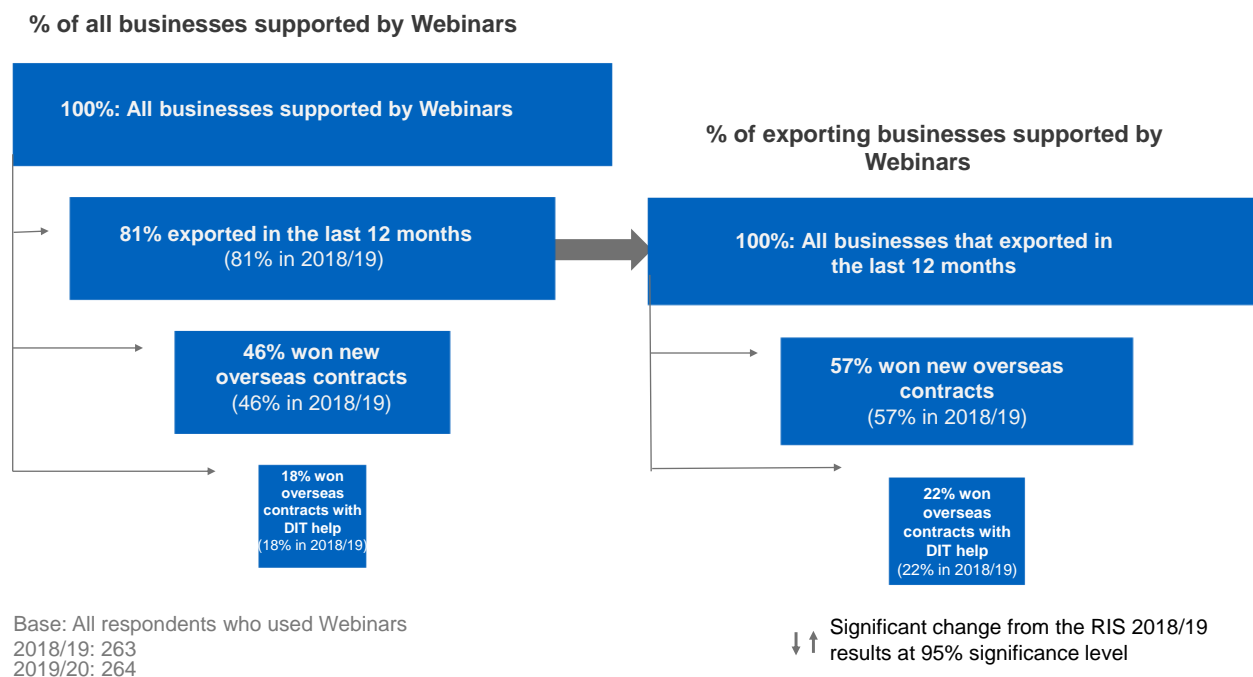
This section summarises the analysis on reported additional impact, which aims to estimate the additional impact that DIT services had on businesses, where this impact would not have happened without DIT’s support.

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

Exporting businesses that had won any new overseas sales contracts in the 12 months since using the service were asked whether they could estimate the extent DIT had supported them achieving this⁵³.

⁵³ The figures reported in this section are self-reported and provide levels of perceived impact. This should be taken into account when interpreting the results.

Chart 3.3.8 Summary of businesses supported by Webinars⁵⁴



3.3.6. Exposure and growth within new markets: Webinars

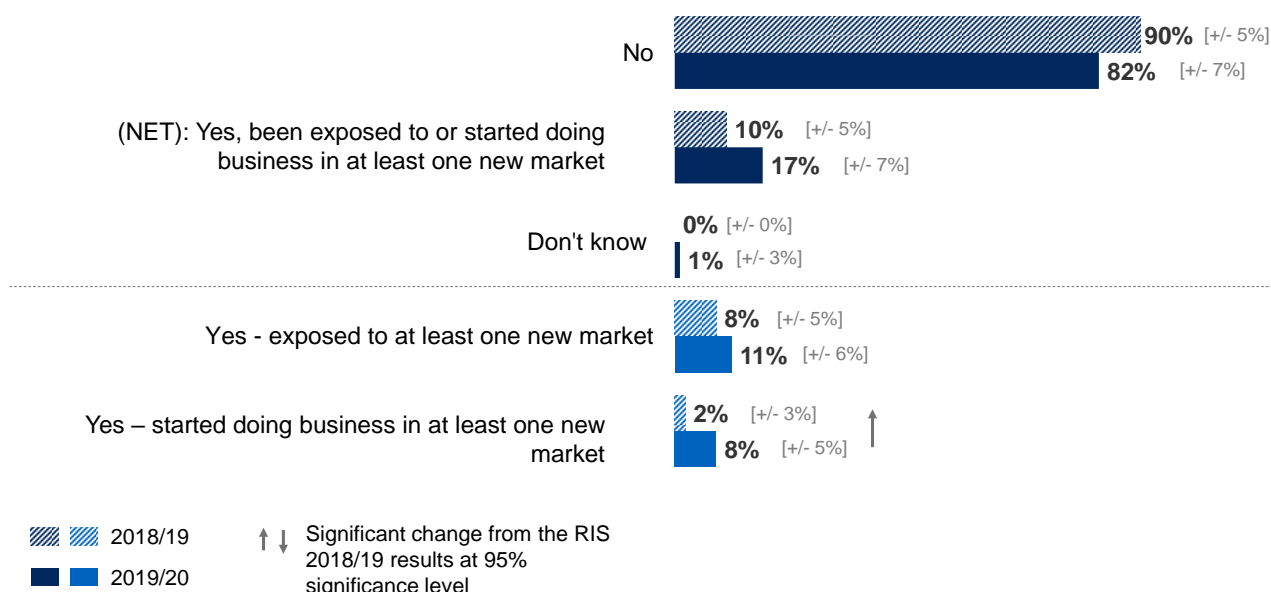
All businesses that used Webinars were asked whether they received increased exposure or started doing business in any new markets because they accessed the Webinars service⁵⁵. Around one in ten (11%) had been exposed to at least one new market and eight per cent had started doing business in at least one new market as a result of using the Webinars service.

There has been an increase since the 2018/19 RIS in the proportion that had started doing business in at least one new market as a result of using the Webinars service, from two per cent to eight per cent. Due to the low base sizes, it is not possible to say whether this change is a result of the change in the profile of businesses taking part in the survey in 2018/19 and 2019/20.

⁵⁴ In order to give an estimate of DIT additionality across all businesses an assumption is made that DIT helping 38% win new contracts applies to all who won new contracts, whether they think they can estimate DIT help or not, so $38\% * 46\% = 18\%$. Find more information about how this was calculated in the technical report.

⁵⁵ Respondents could select both that they had been exposed to at least one new market and that they had started doing business in at least one new market.

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



QGrowthDIT – Has your business had increased exposure to or started doing business in a new overseas market in the past year BECAUSE OF [SAMPLED SERVICE]? Base: All respondents who used Webinars
 2018/19: 119
 2019/20: 133

3.3.7. Barriers to exporting: Webinars

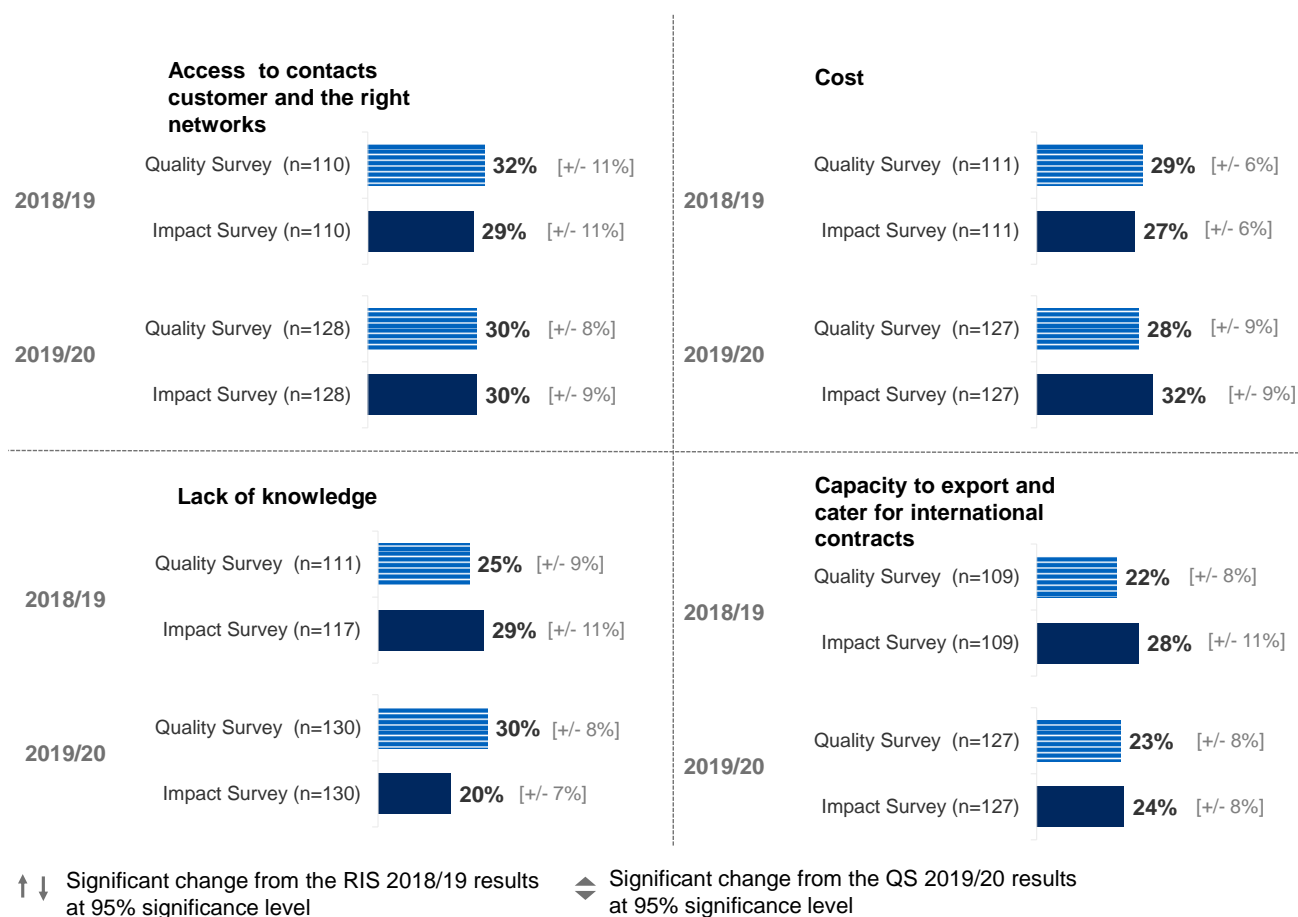
Businesses were asked in both the Quality Survey and Reported Impact Survey about some **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all). This section compares results for businesses who completed both surveys and provided a response to this question in both surveys⁵⁶.

Businesses were most likely to say that ‘cost’ (32%) and ‘access to contacts, customers and the right networks’ (30%) were barriers to exporting.

When comparing results with the 2018/19 RIS, there were no significant changes in the proportions reporting the various barriers to exporting (Chart 3.3.10). There was also no change when comparing the results with the 2019/20 Quality Survey.

⁵⁶ Businesses that said a barrier was not applicable in either survey were excluded.

Chart 3.3.10 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys - Webinars⁵⁷



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

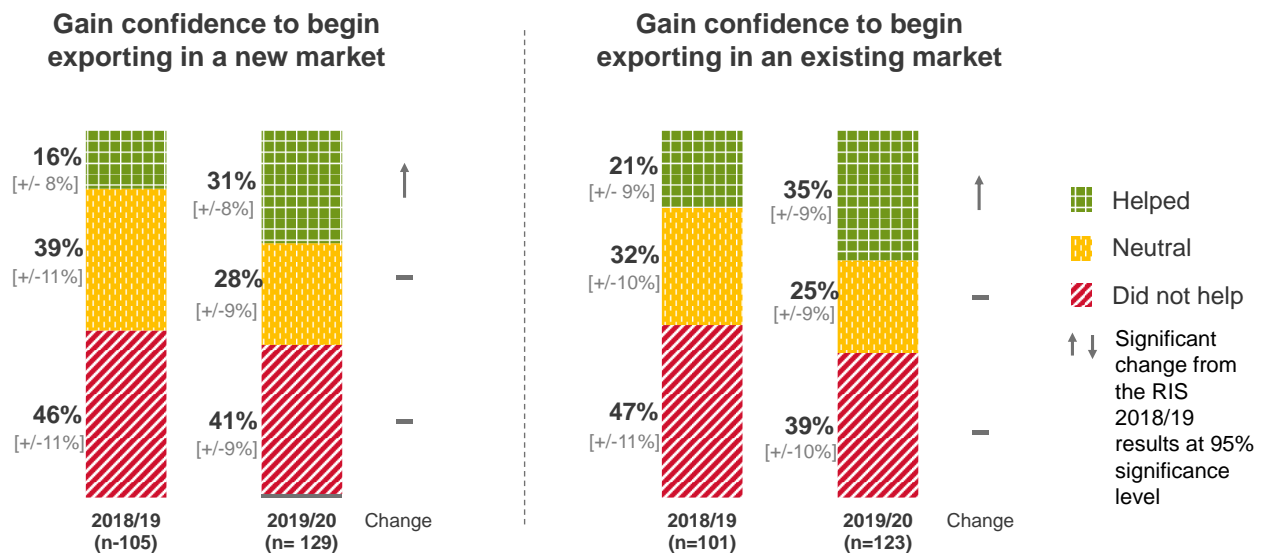
3.3.8. Wider benefits of service: Webinars

Businesses were asked to think about the extent to which the service had **helped them gain confidence** to begin exporting in a new market and increase exporting in an existing market, using a similar rating scale as above. Around one in three businesses said that using the Webinars service helped them gain confidence to begin exporting in a new market (31%) or to increase exporting in an existing market (35%). Around four in ten businesses said it did not help them (41% and 39% respectively).

There has been an increase since the 2018/19 RIS on both measures. The proportion that said using Webinars helped them gain confidence to begin exporting in a new market increased from 16% to 31%, while the proportion that said this about exporting in an existing market increased from 21% to 35%. Due to the low base sizes, it is not possible to say whether these changes are a result of the change in the profile of businesses taking part in the survey in 2018/19 and 2019/20.

⁵⁷ The percentages shown in this chart are for businesses that rated a category as 7-10 out of 10 when asked how much of a barrier it is.

Chart 3.3.11 To what extent experience of the service helped to build confidence in exporting – Webinars



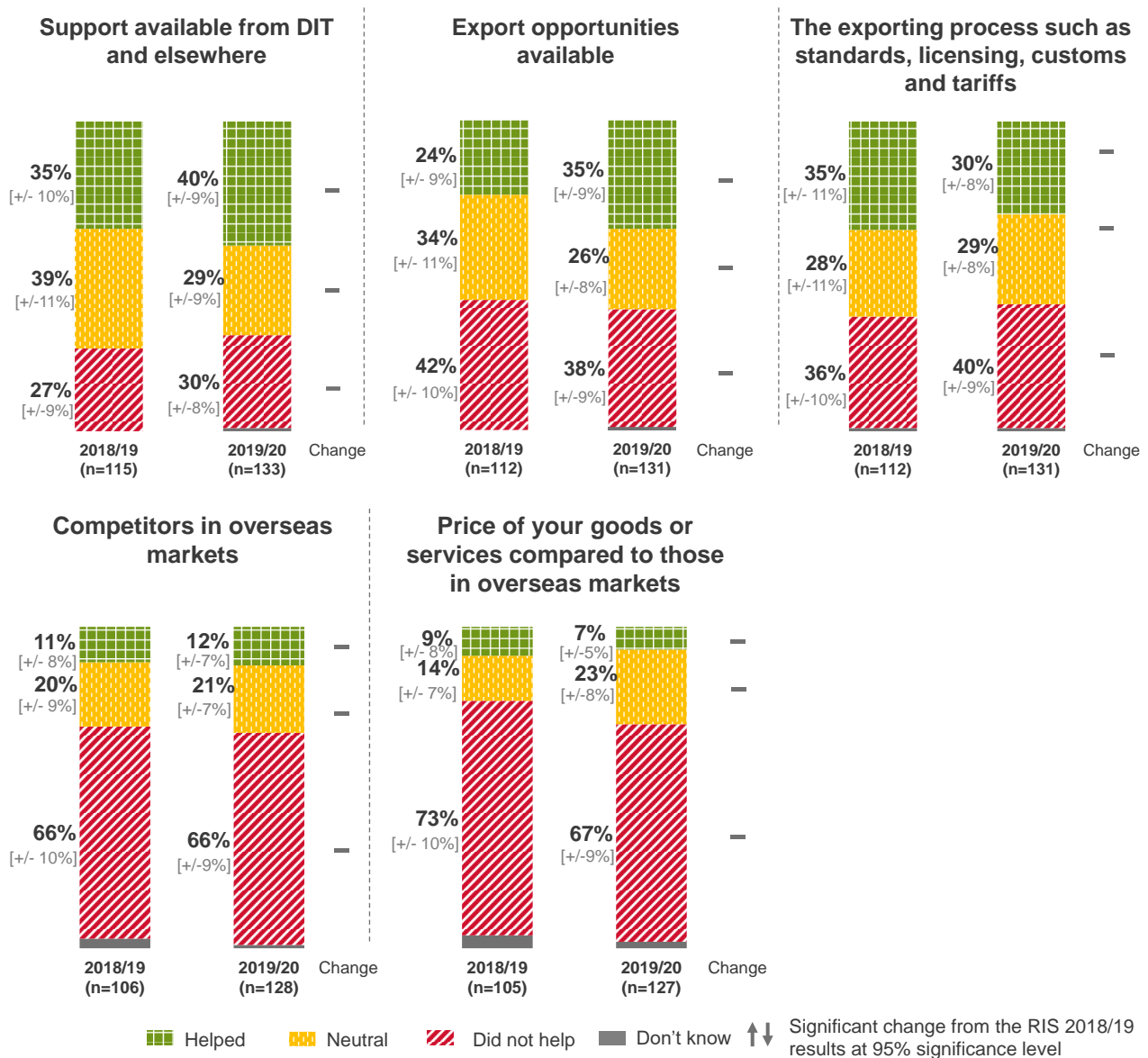
QGainConfidence - On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of [SAMPLED SERVICE] help you to...?
 Base: All respondents who used Webinars except those giving a 'not applicable' answer

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

- Four in ten (40%) businesses that had used Webinars said that the service helped them by increasing their knowledge of the support available from DIT and elsewhere, while three in ten (30%) said the service did not help them in this way.
- Around a third of businesses that had used Webinars (35%) said that the service had helped them to increase their knowledge of the export opportunities available, while a similar proportion (38%) said they were not helped in this way.
- Three in ten (30%) businesses that had used Webinars said it improved their knowledge of the exporting process, while four in ten (40%) said the service did not help them in this way.
- Smaller proportions said that using Webinars improved their knowledge of competitors in overseas markets (12%) and the price of goods compared with those in overseas markets (7%).

There were no significant changes from the 2018/19 RIS.

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



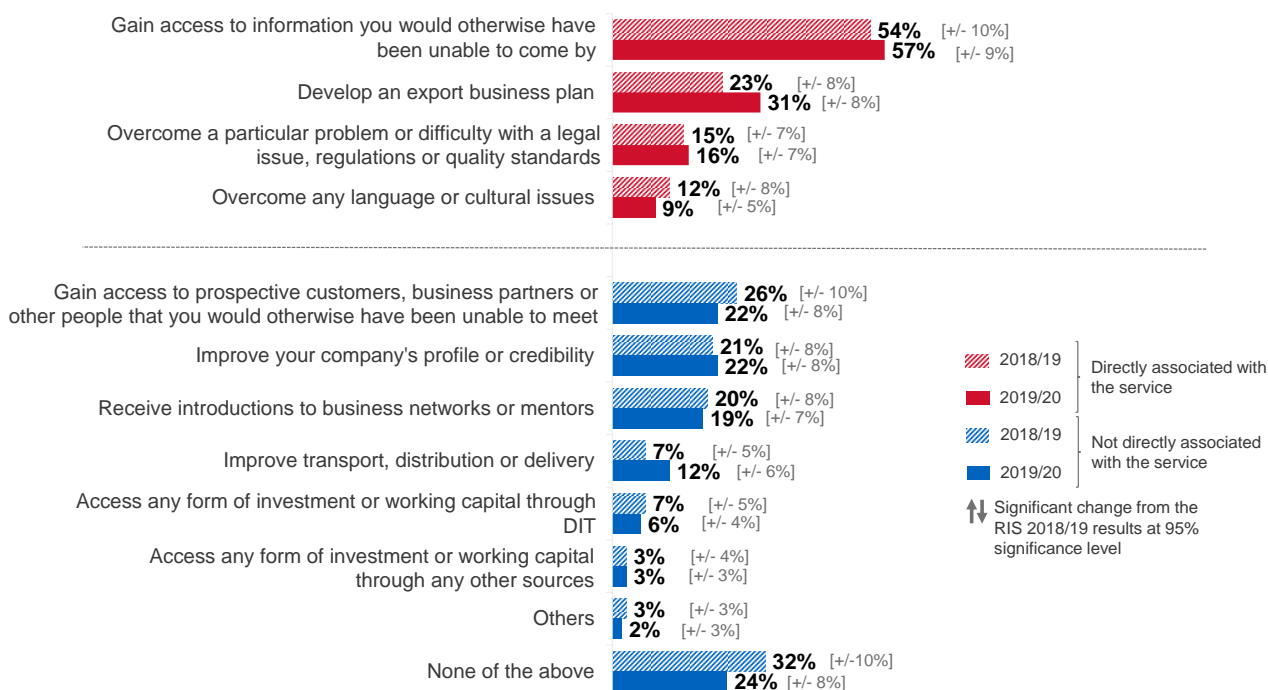
QImproveKnowledge - Using the same scale, To what extent do you feel that your business improved its knowledge of the following as a result of [SAMPLED SERVICE]? Base: All respondents who used TAP except those giving a 'not applicable' answer

Businesses were asked about other ways they had benefitted from using Webinars in the year between dealing with the Webinars and the RIS interview. A detailed breakdown of responses is shown in Chart 3.3.13, where activities in red show those most closely associated with the service.

The most frequent response from a pre-coded list was to gain access to information that they would have otherwise been unable to come by (57%). Three in ten (31%) said they developed an export plan, and two in ten said it helped them to gain access to prospective customers (22%), improve the company's profile or credibility (22%) or receive introductions to business networks or mentors (19%).

There were no significant changes since the 2018/19 RIS.

Chart 3.3.13 In what ways has the business felt it had benefited from DIT support - Webinars⁵⁸



QServiceBenefit – In which of the following ways if any, has your business benefited specifically from [SAMPLED SERVICE] over the last year?
 Base: All respondents who used Webinars
 2018/19: 119
 2019/20: 133

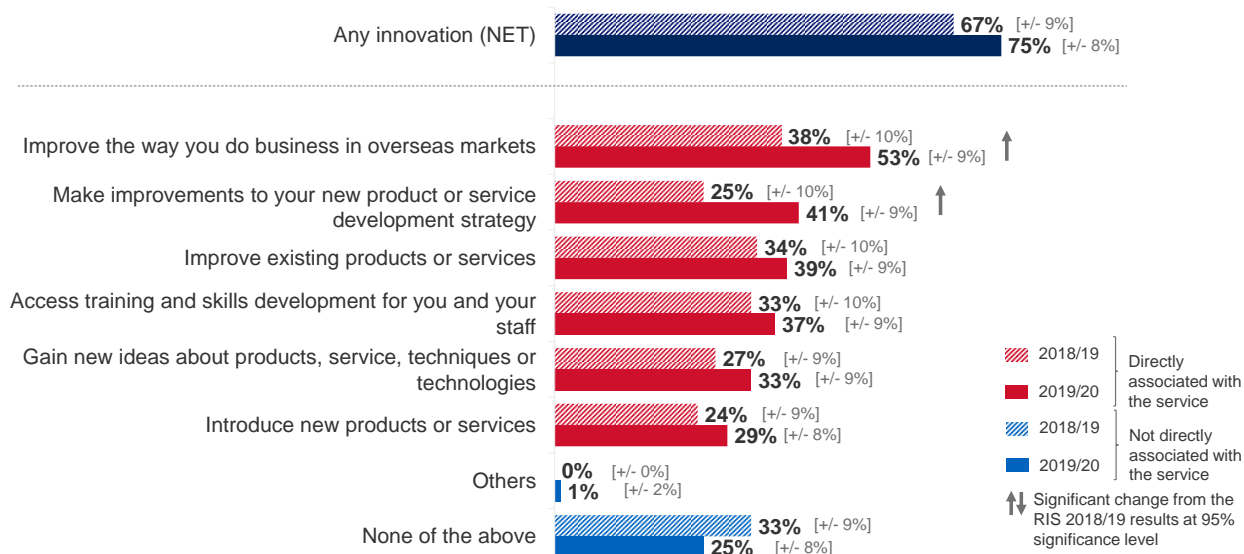
Businesses were asked whether using Webinars had helped, or will help, support innovation and development as a business. Three-quarters (75%) said that using the service helped them with innovation or development in some form. Answer codes shown in red were most closely associated with the service. The most frequent response was to ‘improve the way you do business overseas’ (53%).

Around four in ten said that using the Webinars service helped them make improvements to new products or services (41%), improve existing products or services (39%) or access training and skills development (37%). Around three in ten said they had gained new ideas about products, services, techniques or technologies (33%) or had introduced new products or services (29%).

Comparing results with the 2018/19 RIS, the proportions reporting two of the items have increased: ‘improve the way you do business overseas’ (from 38% to 53%) and make improvements to new product or service development strategy (from 25% to 41%). Due to the low base sizes, it is not possible to say whether these changes are a result of the change in the profile of businesses taking part in the survey in 2018/19 and 2019/20.

⁵⁸ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.3.14 Whether the service has / will help innovation and development - Webinars^{59 60}



QInnovationSupport – Still thinking of [SAMPLED SERICE], has this service helped or do you expect it to help your business with development and/or innovation? Specifically...
 Base: All respondents who used Webinars
 2018/19: 119
 2019/20: 133

International contacts

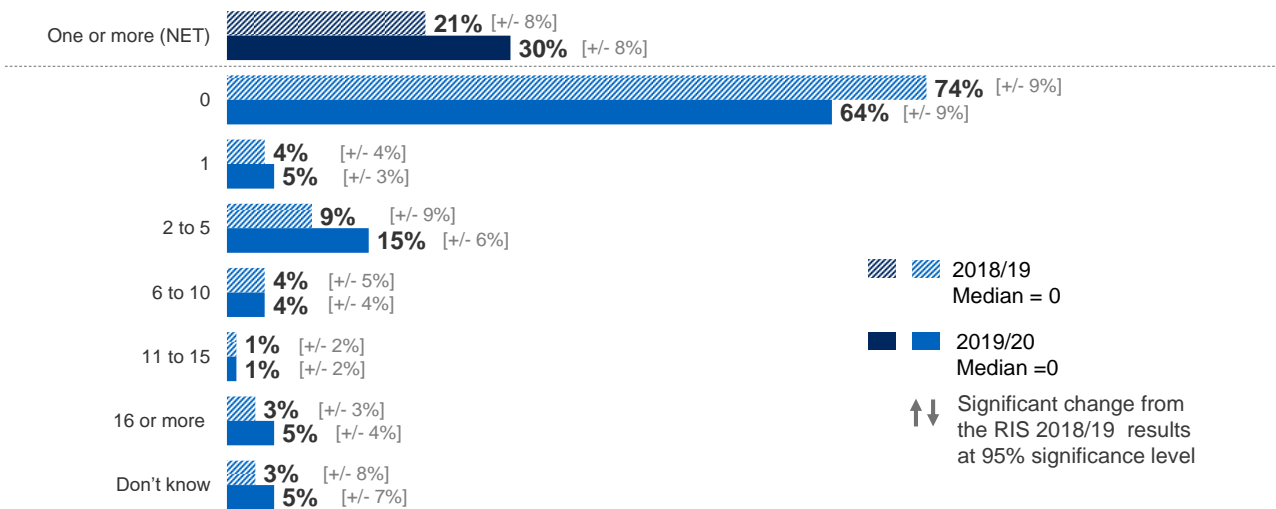
Businesses were asked how many overseas contacts they had made as a result of using Webinars over the past year (Chart 3.3.15). Three in ten (30%) businesses made at least one new overseas contact in the year since using the Webinars service. Five per cent made one new overseas contact, and 15% made between two and five new contacts. Four per cent of businesses made between six and ten new overseas contacts, and six per cent made more than ten new contacts. Around six in ten (64%) reported that they had not made any new contacts as a result of using the Webinars service.

There were no significant changes since the 2018/19 RIS.

⁵⁹ The 'Any innovation (NET)' groups together all responses from the question apart from responses of 'none of the above'.

⁶⁰ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.3.15 Number of new overseas contacts made in previous 12 months – Webinars



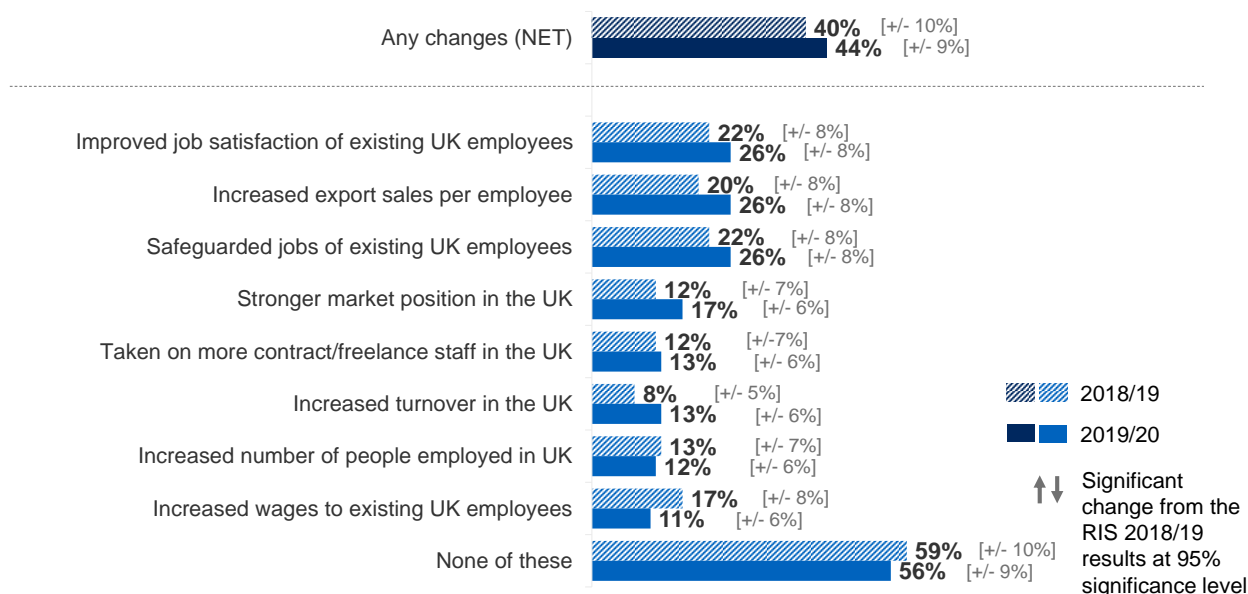
Q_ContactsMade –How many new overseas contacts if any, did your business make a result of [SAMPLED SERVICE] in the past year?
 Base: All respondents who used Webinars
 2018/19: 119
 2019/20: 133

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Webinars service (Chart 3.3.16). Around one in four businesses said they thought using the Webinars service had, or would, improve job satisfaction of existing UK employees, increase export sales per employee or safeguard jobs in the UK (all mentioned by 26%).

One in six (17%) businesses felt they had a stronger market position in the UK, while just over one in ten had taken on more contract or freelance staff in the UK (13%), increased turnover in the UK (13%), had increased wages to existing UK employees (18%), increased the number of their UK employees (12%) or increased wages of existing UK employees (11%).

There were no significant changes since the 2018/19 RIS.

Chart 3.3.16 Changes expected / seen in the UK business as a result of receiving the service - Webinars⁶¹



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
 Base: All respondents who used Webinars
 2018/19: 119
 2019/20: 133

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

Businesses were asked about the actions they had taken following their use of the Webinars service (Chart 3.3.17).

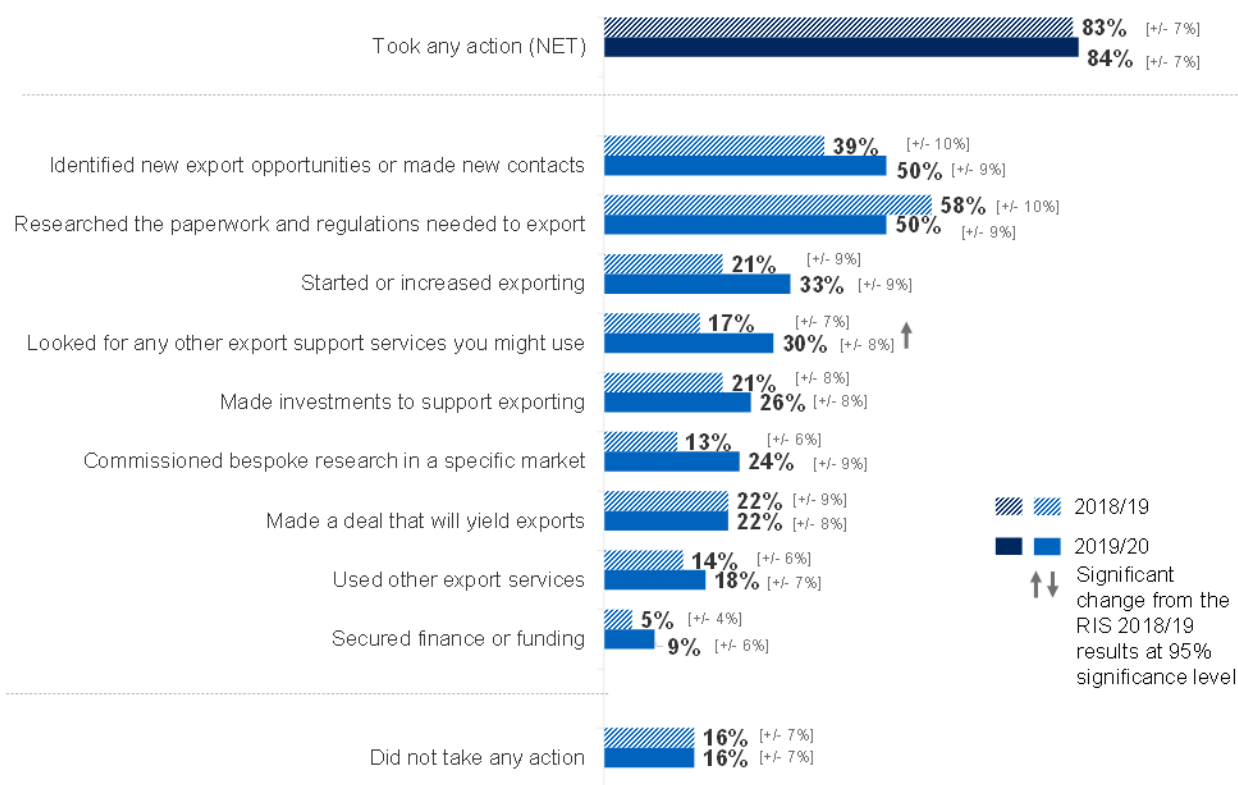
Half of Webinars users reported that they had identified new export opportunities or made new contacts, or had researched the paperwork and regulations needed to export (50% for each response).

Around three in ten had started or increased exporting (33%) or had looked for other export support services (30%). Around one in four had made investments to support exporting (26%) or had commissioned bespoke research in a specific market (24%). Around one in five had made a deal that will yield exports (22%) or had used other export services (18%).

Comparing results with the 2018/19 RIS, there was an increase in the proportion that had looked for other export support services, from 17% to 30%. Due to the low base sizes, it is not possible to say whether this change is a result of the change in the profile of businesses taking part in the survey in 2018/19 and 2019/20.

⁶¹ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.3.17 What the business has done as a result of receiving the service - Webinars^{62 63}



QResultService – What has your business done as a result of Webinars?
 Base: All respondents who used Webinars. 2018/19: 119, 2019/20: 133.

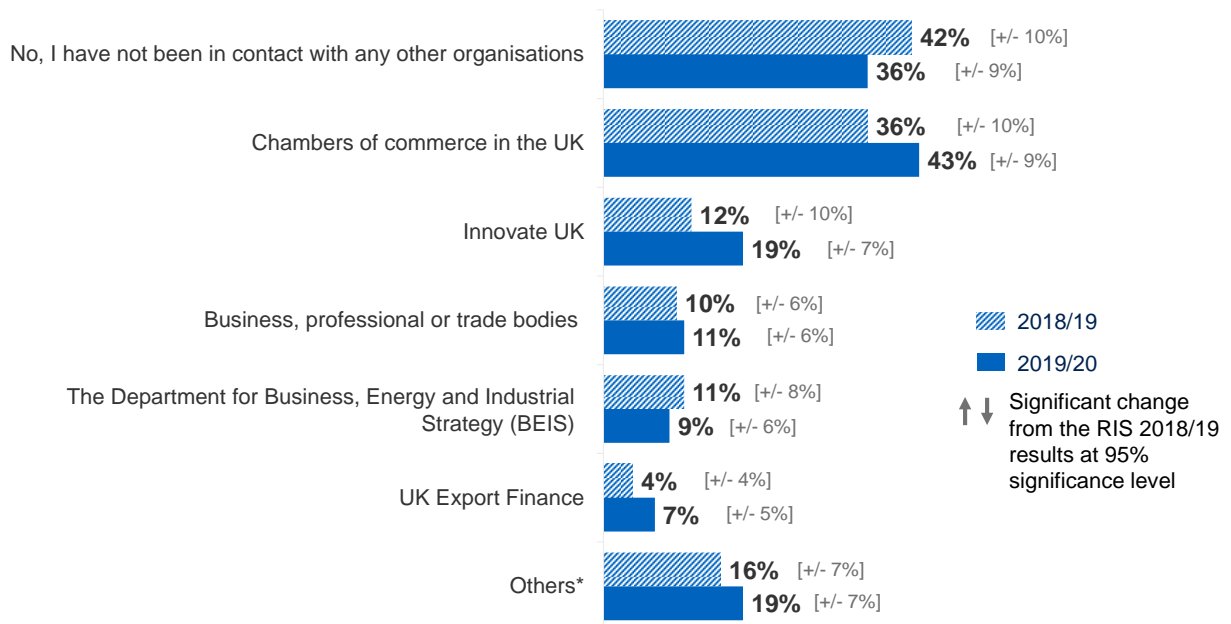
Businesses were asked what organisations they had been in contact with since using Webinars. Around four in ten (43%) businesses had been in contact with the British Chambers of Commerce and around two in ten (19%) had been in contact with Innovate UK. Businesses also reported contact with business, professional or trade bodies (11%), BEIS (9%) or UK Export Finance (7%). Around a third (36%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

There were no significant changes since the 2018/19 RIS.

⁶² The 'Took any action (NET)' groups together all responses from the question apart from responses of 'Did not take any action'. This includes non-exporters who responded 'assessed the company's readiness to export', which is not shown on the chart.

⁶³ The total percentage of all responses for this question add up to above 100 per cent because it is a multi-response question, where respondents can select more than one answer code.

Chart 3.3.18 What organisations respondents have been in contact with since receiving the service - Webinars⁶⁴



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

Base: All respondents who used Webinars

2018/19: 119

2019/20: 133

*Other services include 'Local Enterprise Partnerships' (4%), 'Online / Google' (3%), 'Overseas administrations' (2%) and any others.

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

Appendix 1: Reporting exporting outcomes based on ‘all respondents’

There are several charts within the RIS report (such as chart 3.1.12) which report on the proportion of all service users that DIT helped win new overseas business contracts. It is important to note that not all exporting businesses were asked about the amount of help given by DIT for these new overseas sales contracts.

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

Businesses that answered yes to questions Qcontractservice⁶⁵ or Qcontractdit⁶⁶ were asked a series of questions about the impact of DIT services on their new overseas business contracts. Businesses that answered no were not asked about the levels of assistance given by DIT in helping them win new overseas contracts. Therefore, a proportion of those that had won any new overseas business contracts were not asked questions about DIT help on their ‘export sales’.

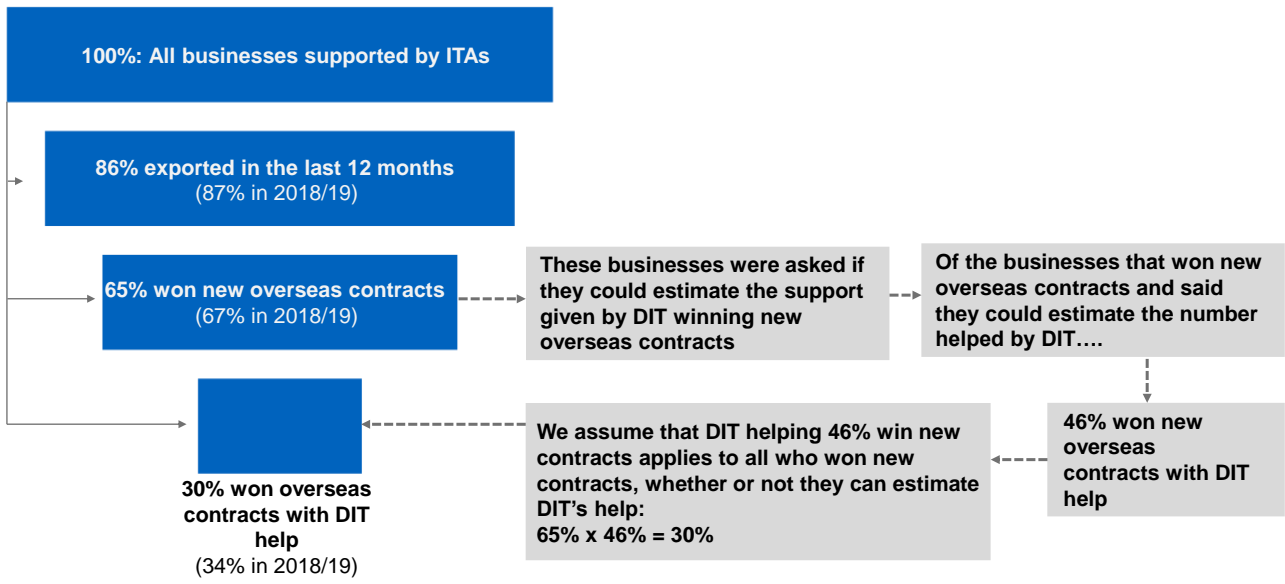
In order to calculate data based on the proportion of all businesses that DIT helped win any new overseas business contracts an additional calculation was necessary. The assumption was made that the proportion of businesses ‘helped’ by DIT was the same for those that could provide an estimate as it was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

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

The chart below shows the process.

⁶⁵ Qcontractservice: *Do you think you are able to estimate the number and value of new overseas business contracts that your business won in the last 12 months that were helped by [SAMPLED SERVICE]?*

⁶⁶ If the answer to Qcontractservice above was not “Yes” the respondent was asked QcontractDIT: *QcontractDIT: Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?*



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