Department for Business & Trade

Export Client Reported Impact Survey for Businesses Supported April 2021 to March 2022

Publication date 21st May 2024

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

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Research contractor: Ipsos UK Public Affairs, London UK
Research Authors: Allan Simpson, Krishna Dabhi, Jamie Douglas, Finlay Procter, Shahil Parmar

Acknowledgements:
The team at Ipsos UK would like to thank Kate McAtamney, Rahul Jalil, Pablo Telford and Ezra Bowden from the Department for Business and Trade for their invaluable inputs during the project. Errors and omissions remain the responsibility of the authors alone.

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This work was carried out in accordance with the requirements of the international quality standard for Market Research, ISO 20252.

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1 Executive Summary

1.1 Introduction

The Department for Business and Trade (DBT), formed in February 2023 as part of the Machinery of Government (MoG) changes which incorporated the former Department for International Trade (DIT), is responsible for promoting exports, both in terms of driving demand from overseas, and encouraging UK businesses to export. DBT offers export promotion services to businesses that wish to seek support with exporting. It tracks the quality and reports impact of its export promotion services through monthly surveys, known as the Export Client Survey (ECS). The main aims of the ECS are to:

- Track client perceptions of the quality of support and advice provided by DBT
- Provide a measure of reported impact on businesses from using a DBT service
- Understand what drives performance and how services can be improved over time

The ECS comprises two linked surveys: a Quality Survey (QS) and a Reported Impact Survey (RIS). This report presents findings from the RIS. The findings are based on 1,717 interviews conducted by Ipsos UK with businesses who used a DBT service between April 2021 and March 2022 (2021/22). See Section 2.3, Table 2.3.1, below for descriptions of DBT's export promotion services covered by the ECS.

Businesses were classified as 'Sustain', 'Reassure' or 'Promote' depending on their export status. Changes in status between the QS and the RIS, and differences in the proportion of businesses changing status in RIS 2021/22 compared to RIS 2020/21, are described in subsequent sections.

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

1.2 International Trade Advisers (ITAs)

Businesses that took part in the survey indicated improved propensity to export, reported winning new overseas contracts and reductions in the severity of some barriers to exporting, and observed improvements in the business operations 12 months after receiving support from ITAs.

While the proportion of businesses currently exporting (classified as 'Sustain') was not significantly different between the Quality Survey stage (3 months after receiving support, 87%) and the Reported Impact Survey stage (12 months after receiving support, 90%), there was a decrease in the proportion who had never exported before (classified as 'Promote'). One in ten (10%) in the Quality Survey stage had never exported before, which fell to 4% in the Reported Impact Survey 9 months later.

In addition, businesses reported having won new overseas contracts, with 70% of businesses reporting having won a new overseas contract in the last 12 months, including 31% saying this was with ITA or DBT assistance. Among businesses that won an overseas contract in the past year, 5% said they would not have been able to do this without DBT, and 11% said it would have been unlikely to be able to do this without DBT.

Compared to these businesses' responses in the Quality Survey, there was a decrease in the proportion of businesses that reported some barriers to exporting 9 months later. For example, businesses were less likely to report 'lack of knowledge' (23%, down from 32% in the Quality Survey) and 'capacity to export and cater for international contracts' (20%, down from 27% in the Quality Survey) as barriers.

Businesses who received support from ITAs also reported improvements to their operations 12 months later. The top three changes expected or seen as a result of using the service were: improving job satisfaction of existing UK employees (43%), safeguarding jobs of existing UK employees (42%), and increasing export sales per employee (42%).

Lastly, the survey indicated changes in exporting markets of businesses compared to the previous Reported Impact Survey report. Compared to the previous year, Europe replaced Asia as the most common new market for increased exposure or business. This was in line with the Reported Impact Survey 2019/20, when Europe was previously the most common market for increased exposure or business. In the 2021/22 survey, businesses who had been exposed to new markets were less likely to report increased exposure in Asia (37% compared to 53% in 2020/21), but more likely to report increased exposure in non-EU European countries (19% compared to 8% in 2020/21), although findings for within the EU and Europe overall remained in line with the previous year.

1.3 Posts

Businesses that took part in the survey indicated improved propensity to export, reported winning new overseas contracts, and observed other improvements in the operations of their business 12 months after receiving support from Posts. However, barriers to exporting still remained.

There was an increase in the proportion of businesses currently exporting (classified as 'Sustain'), from 75% at the Quality Survey stage (3 months after receiving support) to 85% at the Reported Impact Survey stage (12 months after receiving support). More than four in ten businesses (43%) who had never exported before (classified as 'Promote') at the Quality Survey stage had shifted to being a current exporter at the Reported Impact stage 9 months later.

In addition, businesses reported having won new overseas contracts, with 66% of businesses reporting having won a new overseas contract in the last 12 months, including 25% saying this was with Posts or DBT assistance.

However, businesses were still facing barriers to export. The top barrier was 'cost' (40%) followed by 'access to contacts' (36%), 'lack of knowledge' (26%) and 'capacity to export' (17%). These results were in line with the Quality Survey stage.

Nevertheless, businesses who received support from Posts did report improvements to their operations 12 months later. The top three changes expected or seen as a result of using the service were safeguarding jobs of existing UK employees (33%), increasing export sales per employee (30%) improving job satisfaction of existing UK employees (29%).

Lastly, the survey indicated changes in exporting markets compared to the previous Reported Impact Survey report. Compared to the previous year, Europe replaced Asia as the most common new market for increased exposure or business. This was in line with the Reported Impact Survey 2019/20 survey, when Europe was previously the most common market for increased exposure or business. In the 2021/22 survey, businesses who had been exposed to new markets were more likely to report increased exposure in Europe (60% compared to 28% in the previous year) and specifically the European Union (48% compared to 20% in the previous year), while they were less likely to report increased exposure in Asia, including Australia and New Zealand (33%, down from 55% in the previous year).

1.4 Export Academy

Businesses that took part in the survey indicated a good propensity to export, reported winning new overseas contracts, and observed other improvements in the operations of their businesses 12 months from receiving support from Export Academy. However, barriers to export still remained.

The proportion of businesses currently exporting (classified as ‘Sustain’) remained similar between the Quality Survey stage (3 months after receiving support, 75%) and the Reported Impact Survey stage (12 months after receiving support, 80%). A third of businesses (32%) who had never exported before (classified as ‘Promote’) at the Quality Survey stage had shifted to being a current exporter at the Reported Impact stage 9 months later.

Businesses also reported having won new overseas contracts, with 58% of businesses reporting having won a new overseas contract in the past 12 months, including 20% saying this was with Export Academy or DBT assistance.

However, businesses were still facing barriers to exporting. The top barrier was ‘cost’ (37%), followed by ‘access to contacts’ (35%). These findings were in line with the Quality Survey stage.

Nevertheless, businesses who received support from Export Academy did report improvements to their operations 12 months later. The top three changes expected or seen as a result of using the service were: improving job satisfaction of existing UK employees (35%), safeguarding jobs of existing UK employees (33%), and increasing export sales per employee (23%).

Lastly, the survey indicated that Europe was the most common new market for increased exposure or business. Of those businesses that reported having increased exposure of starting new business in at least one new market, half (52%) reported doing this in Europe.

1.5 Webinars

Businesses that took part in the survey indicated improved propensity to export, increased likelihood in winning new overseas contracts, reductions in the severity of some barriers to exporting, and observed improvements in the business operations 12 months after receiving support from Webinars.

There was an increase in the proportion businesses currently exporting (classified as ‘Sustain’), from 75% at the Quality Survey stage (3 months after receiving support) to 82% at the Reported Impact Survey stage (12 months after receiving support).

In addition, businesses reported having won new overseas contracts, with 62% of businesses reporting having won a new overseas contract in the last 12 months. This included 20% saying this was with Webinars or DBT assistance, an increase compared to the previous year’s Reported Impact Survey report (13%).

Compared to these businesses’ responses in the Quality Survey, businesses saw a decrease in the proportion that reported some barriers to exporting 9 months later. For example, businesses were less likely to report ‘lack of knowledge’ (25%, down from 33% in the Quality Survey).

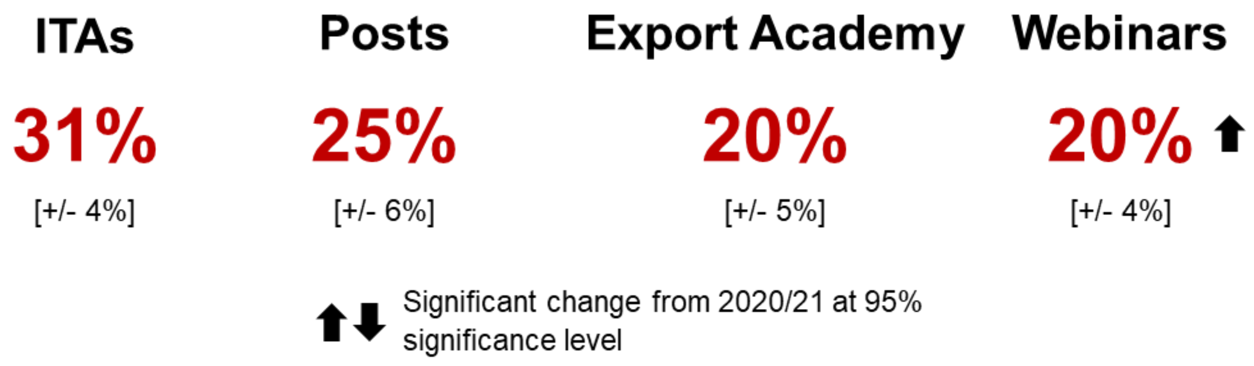
Businesses who received support from Webinars also reported improvements to their operations 12 months later, and this was more likely than in the previous year for some measures. For example, compared to the previous year, businesses were more likely to say they expected or had seen any changes (51%, up from 43% in 2020/21) as a direct result of using the Webinars service, including improving job satisfaction among existing UK employees (34%, up from 23% in the previous year) or increasing export sales per employee (28%, up from 21% in the previous year).

Lastly, the survey indicated that Asia (including Australia and New Zealand) remained the most common new market for increased exposure or business. Of businesses who reported increased exposure in at least one new market, 42% said this was in Asia, followed by Europe (35%), the Middle East (34%) and Africa (22%).

1.6 Summary of DBT impact on contracts

Chart 1.1 provides a summary of DBT’s impact on contracts across the services covered in this report.

Chart 1.1: DBT impact on contracts – proportion of businesses that won export contracts with DBT support



Source: Composite measure merging data from several variables.
Base: All businesses that used the service – ITAs (n=563), Posts (n=228), Export Academy (n=251), Webinars (n=472)

Findings for Missions, Selling Online Overseas (SOO), Export Support Service - International Markets[1] (ESS-IM), Export and Investment Teams (Sector Teams), Overseas Business Network Initiative (OBNI), Overseas Market Introduction Service (OMIS), Business Profiles, and Export Opportunities have not been included in this report due to small base sizes (n < 100).

[1] Previously known as the Enhanced International Support Service (EISS).

2 Introduction

2.1 Background and objectives

The Department for Business and Trade (DBT), formed in February 2023 as part of the Machinery of Government (MoG) changes which incorporated the former Department for International Trade (DIT) and Department for Business, Energy and Industrial Strategy (BEIS), is responsible for promoting exports, both in terms of driving demand from overseas and encouraging UK businesses to export.

In 2021, the then DIT refreshed its Export Strategy, based on:

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

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

2.2 The Export Client Survey

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

- Track client perceptions of the quality of support and advice provided by DBT
- Provide a measure of reported impact on businesses from using a DBT service
- Understand what drives performance and how services can be improved over time

The ECS forms a key component of the export promotion Monitoring and Evaluation Framework. The ECS comprises two linked surveys: a Quality Survey and a Reported Impact Survey. This report presents findings from the Reported Impact Survey, which is a telephone survey on the reported impact of using DBT services. The survey covers measures such as reported impact on innovation, research and development (R&D), employment levels, knowledge and confidence of exporting, additional contracts and turnover as a result of using DBT services.

The findings in this report are based on 1,717 interviews conducted by Ipsos UK with businesses who used a DBT service between April 2021 and March 2022 (2021/22). In this report, when findings from 2021/22 are compared to findings from the 2020/21 survey, or when findings from the RIS 2021/22 are compared to findings from the QS 2021/22, these are statistically significantly different at the 95% probability level.

2.3 Sample frame and fieldwork

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

Table 2.3.1: DBT export promotion services

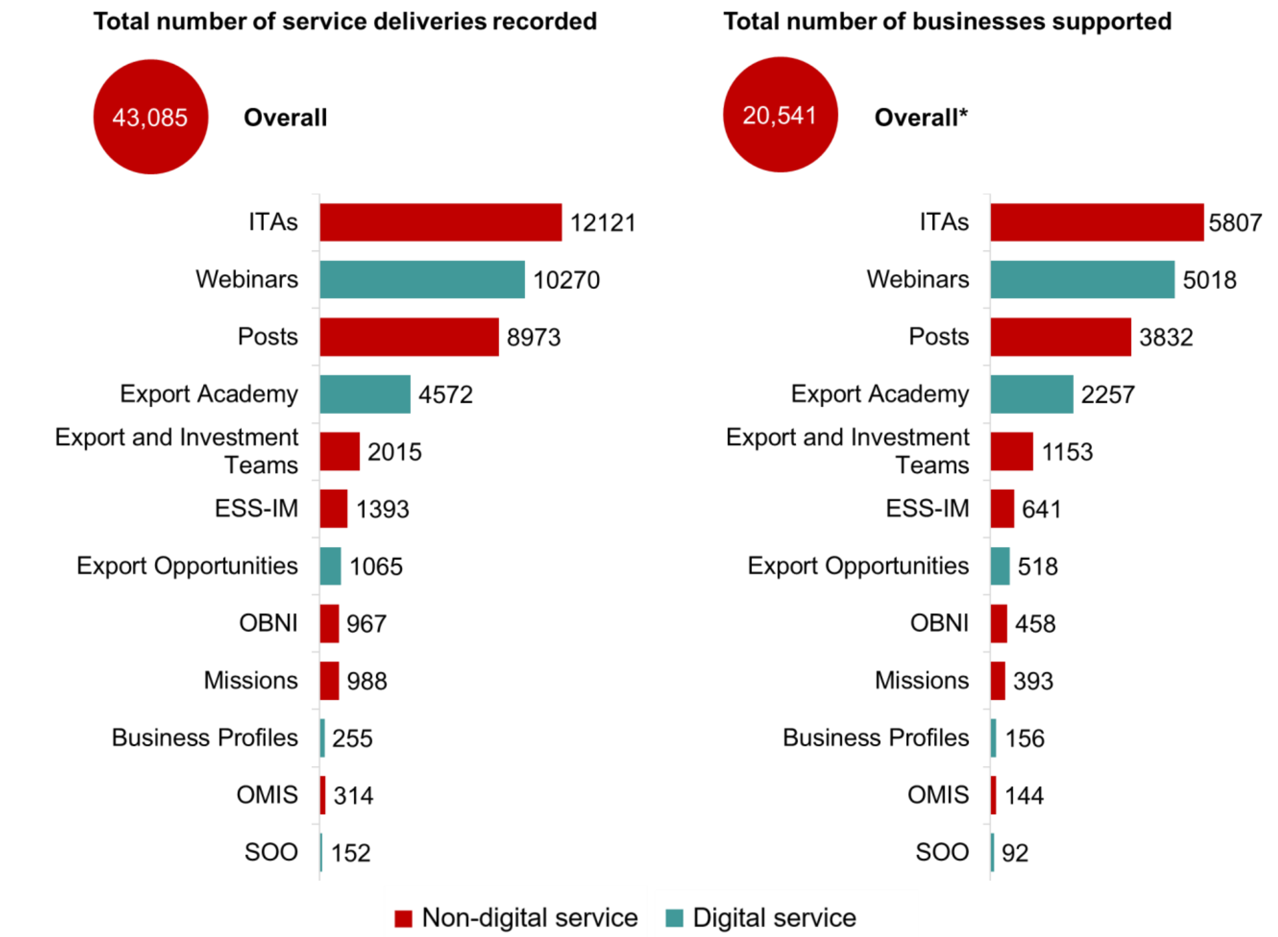
Service	Service description	Digital or non-digital
International Trade Advisers (ITAs)	Provides businesses with impartial face-to-face advice, to help them to identify the services and support they need to grow internationally.	Non-digital
Missions	Services related to events (trade fairs and market research) but with a specific focus on face-to-face deal-making.	Non-digital
Posts	An overseas network that provides in-depth knowledge of local markets, and access to reliable contacts to enhance UK firms' export competitiveness.	Non-digital
Export Support Service – International Markets[2] (ESS-IM)	Provides information and advice to small and medium-sized businesses looking to export to particular overseas markets.	Non-digital
Export and Investment Teams	Work directly with industry and the international network to facilitate collaboration between UK businesses, co-ordinate government to government engagement, and support trade missions.	Non-digital
Overseas Business Network Initiative (OBNI)	Provides information about an overseas market and contacts for possible customers or business partners. It can also provide other help, such as planning and organising events or promotional activity in overseas markets.	Non-digital
Overseas Market Introduction Service (OMIS)	Provides information about an overseas market and contacts for possible customers or business partners. A charged service delivered by staff at British Embassies and Consulates overseas.	Non-digital
Export Academy	Gives businesses the know-how to sell to customers around the world by learning from experts in international trade.	Digital
Selling Online Overseas (SOO)	An online service containing details of some of the leading e-marketplaces and details of special deals negotiated by DBT.	Digital
Webinars	Aim to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting.	Digital
Business Profiles	An online service which enables businesses to promote products and services to international buyers.	Digital
Export Opportunities	An online service on great.gov.uk which promotes global exporting opportunities to UK businesses	Digital

In total, there were around 43,000 recorded service deliveries covered by the ECS between April 2021 and March 2022. From these records, around 20,000 individual unique businesses were supported through all the services covered by the ECS between this

[2] Previously known as the Enhanced International Support Service (EISS).

period. This includes the services that are not covered in depth in this report due to insufficient sample being available.

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



** 72 records issued as part of the QS 2021-22 and 11 QS completes were 'unclassified' for service. These were interviews completed before the mapping eligibility rules for Webinars and Export Academy sample were fine-tuned at an early stage of 2021-22 fieldwork. 6 of those that were unclassified for service agreed to be re-contacted for the RIS 2021-22.*

The services covered in this report are shown in Table 2.3.2. Some services (those where there were fewer than 100 completed interviews) have not been provided with a product findings chapter in this report due to low sample sizes that would lead to issues around the accuracy, large confidence intervals and confidentially of results. Additionally, for the services that are covered in this report, any response options to a question which had fewer than 10 responses have been redacted.

Table 2.3.2: Services covered in this report

Bespoke offers and face to face support
International Trade Advisers (ITAs)
Posts
Universal offers (digital and events)
Export Academy
Webinars

3 Methodology

3.1 Sample Design

The Export Client Survey (ECS) involves two different surveys. The Quality Survey (QS) takes place first, approximately 3 months after a business has an interaction with DBT. All businesses that completed the QS and agreed to recontact for research purposes are included in the sample for the Reported Impact Survey (RIS). The RIS takes place approximately 9 months after the business completed the QS (and 12 months after the business has an interaction with DBT). This ensures sufficient time is lapsed to collect information about reported impact while allowing businesses to be able to recall an event and their business dealings over this period.

3.1.1 Reported Impact Survey (RIS)

Fieldwork for this report began in April 2022 (interviewing businesses who received support from DBT in April 2021 and who participated in the Quality Survey in July 2021). This report covers DBT services delivered between April 2021 and March 2022. The average (mean) interview length was around 16 and a half minutes.

We checked to see whether there was a ‘positivity’ bias, that is whether those who participated in the RIS were more likely to have reported that they were satisfied with the DBT service delivery (provided a rating of 7 or more out of 10 when asked in the QS how satisfied they were with the service).[3] Table 3.1.1 compares the proportions of businesses that were satisfied in their dealings with the DBT product or service in the QS. The column for ‘All Quality Survey respondents’ presents satisfaction ratings for all who completed the QS. The column for ‘All RIS respondents’ presents the QS satisfaction score for all that completed the RIS. None of the differences in the table are statistically significant (at a 95% confidence level). There is no evidence indicating that there is a positivity bias from this analysis.

[3] 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.

Table 3.1.1: Proportions of businesses that were satisfied in their dealings with the DBT product or service in the QS and RIS (confidence intervals given in square brackets)

DBT Product or Service	All QS respondents (% satisfied)	All RIS respondents (% satisfied)
International Trade Advisers (ITAs)	83% [+/- 2%]	81% [+/- 4%]
Missions	83% [+/- 11%]	91% [+/- 16%]
Export Academy	78% [+/- 3%]	77% [+/- 7%]
Overseas Market Introduction Service (OMIS) (great.gov.uk)	78% [+/- 22%]	93% [+/- 19%]
Posts	73% [+/- 4%]	76% [+/- 7%]
Export Support Service – International Markets[4] (ESS-IM)	72% [+/- 10%]	77% [+/- 17%]
Overseas Business Network Initiative (OBNI)	70% [+/- 15%]	84% [+/- 21%]
Export and Investment Teams	68% [+/- 9%]	70% [+/- 14%]
Webinars	67% [+/- 3%]	66% [+/- 5%]
Business Profiles	54% [+/- 19%]	41% [+/- 28%]
Selling Online Overseas	51% [+/- 20%]	38% [+/- 43%]
Export Opportunities	48% [+/- 12%]	56% [+/- 20%]
Overall	74% [+/- 1%]	75% [+/- 3%]

3.2 Response rates

Table 3.2.1 below shows response rates achieved between April 2022 and March 2023. Table 3.2.2 breaks this down by DBT product or service. As noted in section 1.3, detailed analysis of several products or services has not been included in this report as the base sizes were too low to report on with confidence.

We calculated the overall response rate using the American Association for Public Opinion Research (AAPOR) standard definitions, an industry standard metric for calculating response rates. As all businesses in the RIS sample had completed the QS and agreed to be recontacted, there was no ineligible sample. However, due to a correction in the eligibility of the ESS-IM service in February 2023, 16 ESS-IM participants who had taken part in the RIS were removed at the analysis stage. Since these 16 participants took part in the RIS, they are included in the response rate calculation, but not in the reported results:

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

We achieved a 57% response rate for interviews conducted between April 2022 and March 2023 (based on response rate 3 calculations from the AAPOR standard definitions, which exclude deadwood).

[4] Previously known as the Enhanced International Support Service (EISS).

Table 3.2.1: Fieldwork outcomes April 2022 to March 2023

Fieldwork outcomes	Number of cases (N)
Number of cases issued	3,655
Live sample not interviewed	808
Deadwood (uncontactable phone numbers)	625
Refusal	489
Ineligible	0
Completed interviews	1,733*
Response rate	57%

*16 ESS-IM participants were subsequently removed at the analysis stage due to a correction in the eligibility for this service in February 2023. This gave a total base for analysis of 1,717.

3.2.1 Response rate for each DBT service

Table 3.2.2: Fieldwork outcomes April 2022 to March 2023 (by service)

Outcome	ITAs	Missions	OBNI	OMIS	Posts	Export & Investme-nt Teams	Webinars	Export Opportu-nities	Business Profiles	Selling Online Overseas	Export Academy	ESS-IM
Number of cases issued	1,184	60	41	18	536	120	929	78	25	19	509	128
Live sample not interviewed	256	20	5	1	129	37	192	18	0	5	116	28
Deadwood	214	7	16	4	107	18	149	16	7	2	63	22
Refusal	151	9	4	4	72	12	116	8	4	1	80	27
Complete	563	24	16	9	228	53	472	36	14	11	251	51
Response rate	58%	45%	64%	64%	53%	52%	61%	58%	78%	65%	56%	48%

Note that 8 participants were unclassified by service. These are not shown in the tables.

3.3 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 analysis and the charts unless otherwise stated or 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 for each chart.

Charts and tables in the report also display the Confidence Interval (CI) for each question or answer option. 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 defines the range within which we can be 95% confident that the true number will be.

In addition, charts and tables represent a statistically significant increase from RIS 2020/21 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 QS 2021/22 and the RIS 2021/22. 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.

For further details on the methodology, please refer to the Technical Report.

4 Product Findings

This chapter presents the key findings for each of the DBT services or products covered by the Reported Impact Survey (RIS), examining the performance of services and products in terms of benefits to businesses' export capabilities, the actions they took to prepare themselves for exporting, and departmental metrics.

Service use took place between April 2021 and March 2022. Therefore, the 'current year' refers to 2021/22, while the 'previous year' refers to 2020/21.

As noted in the Introduction and Methodology sections, the report only covers services or products where base sizes were sufficiently comprehensive (section 2.3). Further detail about how to interpret the data can also be found in section 2.3.

4.1 International Trade Advisers (ITAs)

International Trade Advisers (ITAs) provide businesses with impartial face-to-face and/or virtual 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 DBT, other government offices, and independent third-party service providers for more in-depth support across specialist areas.

This chapter explores the impact of using the ITA service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 563 businesses that used ITAs between April 2021 and March 2022 and participated in both the Quality Survey (QS) and RIS.

4.1.1 Summary of reported impact as a result of ITA support (from RIS)

Actions taken as a result of using ITAs

Following their use of the ITA service, two in three businesses had identified new export opportunities or made new contacts (66%). Among non-exporters, seven in ten (69%) businesses had assessed their readiness to export after using ITAs.

Compared to the previous year, businesses were more likely to have identified new export opportunities or made new contacts (66%, up from 57% in 2020/21), started or increased exporting (47%, up from 37%), and secured finance or funding to support export activity (24%, up from 15%). Businesses were less likely to have researched the paperwork and regulations needed to export (53%, down from 61%) and used any other export support services not provided by DBT (27%, down from 35%).

Impact on exporting

The proportion of businesses classified as ‘Sustain’ (i.e. currently exporting) was in line with the previous year (90% in both 2021/2022 and 2020/2021), and in line with the QS 2021/22 (90% compared to 87%).

Compared to QS 2021/2022, fewer businesses were classified as ‘Promote’ (i.e. never exported before) (4%, down from 10%). In total, four in ten (39%) businesses classified as ‘Promote’ in the QS 2021/22 survey had shifted to ‘Sustain’ in the RIS 2021/22. This was in line with the previous year.

Impact on winning contracts

Of the businesses that exported, eight in ten (82%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the ITA service.

Overall, 70% of businesses won a new overseas contract, including 31% saying this was with ITA or DBT assistance. Among businesses that won an overseas contract in the past year, 5% said they would not have been able to do this without DBT, and 11% said it would have been unlikely to be able to do this without DBT. These findings were in line with the previous year.

Impact on exposure and growth

Two in three (66%) businesses who won any new overseas business contracts with the help of DBT said ITAs assisted with expansion into a new market, and three-quarters (75%) said ITAs assisted with expansion within an existing market.

Among all businesses, one in four (26%) reported being exposed to or starting to do business in at least one new market. These findings were in line with the previous year.

Compared to the previous year, Europe replaced Asia as the most common new market for increased exposure or business. This was in line with the RIS 2019/2020 survey, when Europe was previously the most common new market for increased exposure or business.

Businesses that had been exposed to at least one new market were less likely to report increased exposure in Asia (37% compared to 53% in 2020/21), but more likely to report increased exposure in non-EU European countries (19% compared to 8% in 2020/21), although findings for within the EU and Europe overall remained in line with the previous year.

Impact on contacts and networks

Over half of businesses (53%) made at least one new overseas contact after using ITAs (three contacts on average), although 56% reported DBT support did not make any difference to making exporting contacts. The average number of contacts made was three, which was an increase from the RIS 2020/21 average of two.

Impact on confidence

Over a third (36%) reported that using the ITA service boosted their confidence to export in a new market, and an equal proportion (36%) said this for increasing exports in an existing market.

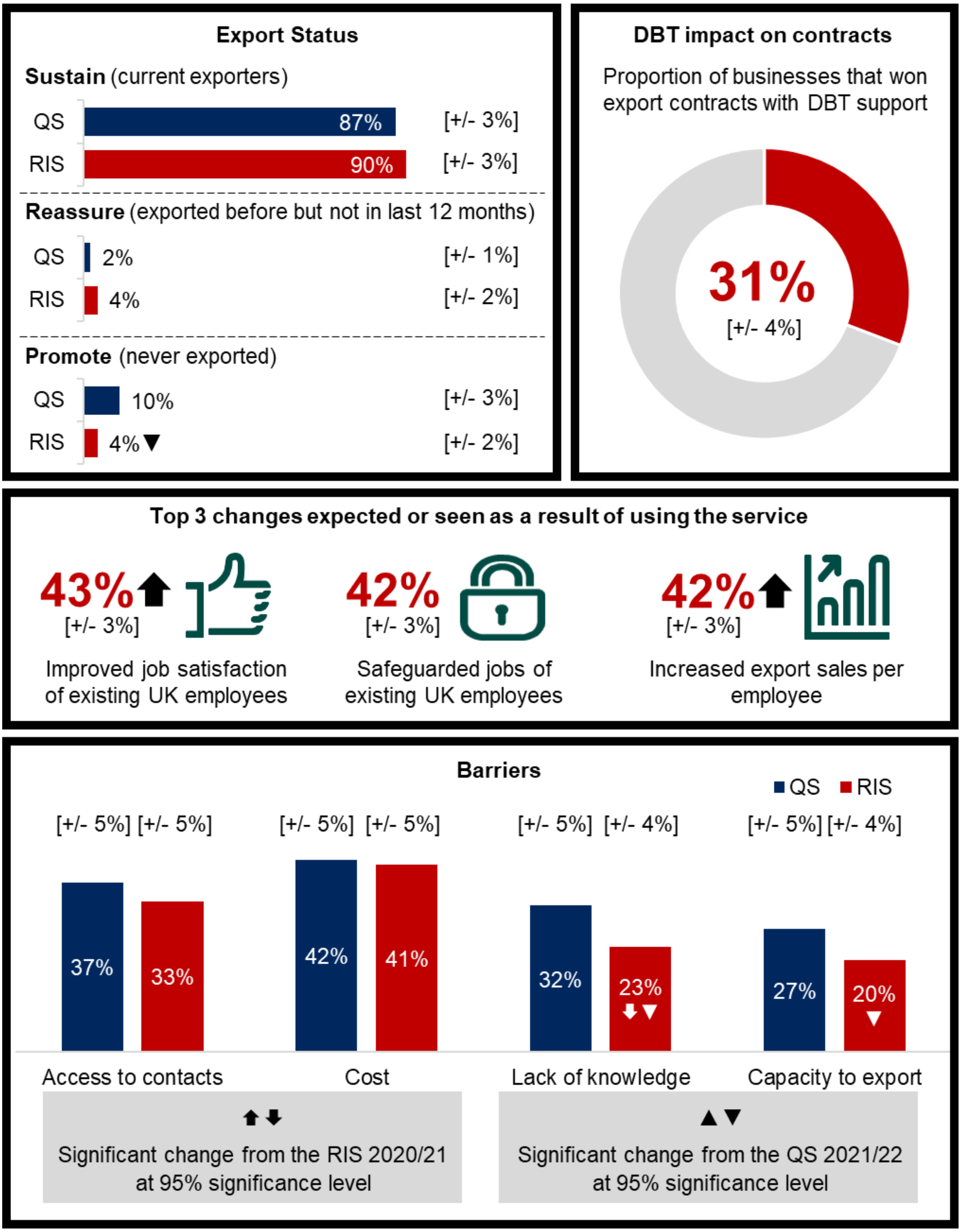
Compared to the previous year, more businesses reported that using the ITA service boosted their confidence to increase exporting in an existing market (28% in 2020/2021).

Other impact

Six in ten (59%) businesses reported that the ITA service helped them to gain access to information that they would otherwise have been unable to come by.

Businesses felt more positive that using the ITA service had helped them to gain access to prospective customers, business partners or other people (50% compared to 42% in 2020/21).

Chart 4.1.1 Key indicators from the RIS (International Trade Advisors (ITAs))



Base: All businesses that used ITAs and completed both surveys (n=563); Barriers - Access to contacts (QS n=559, RIS n=560), Cost (QS n=556, RIS n=558), Lack of knowledge (QS n=559, RIS n=560), Capacity to export (QS n=555, RIS n=555)

4.1.2 Satisfaction with ITAs (from Quality Survey)

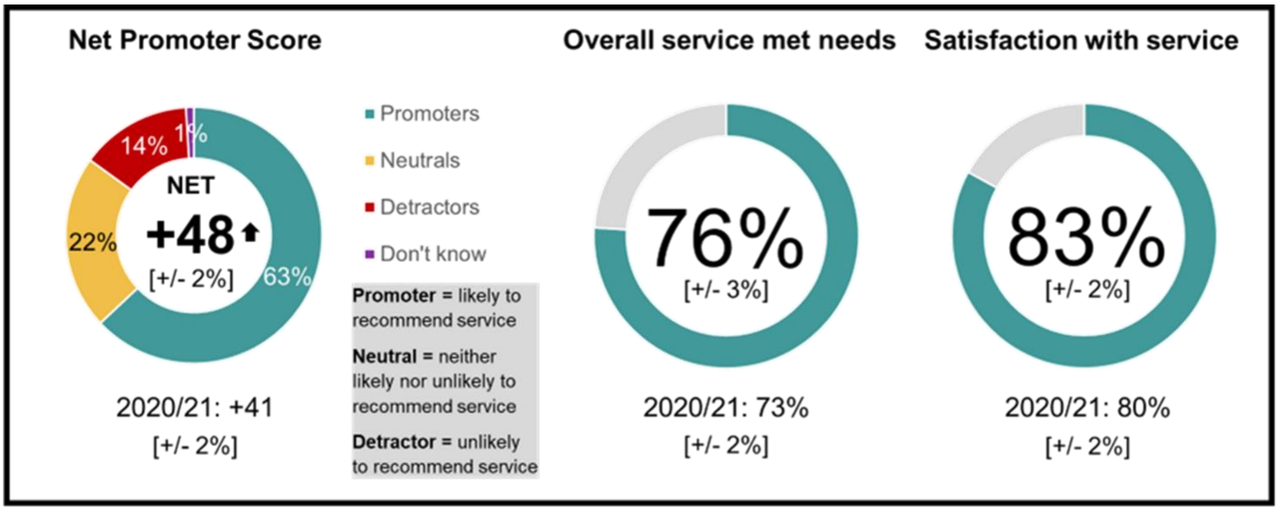
In the QS 2021/22, over six in ten businesses (63%) that used ITAs said they would recommend the service, while one in seven (14%) said they would not. This gave ITAs a Net Promoter Score (NPS) of +48. Eight in ten (83%) reported they were satisfied with the ITA service, and three-quarters (76%) said the overall service met their needs.

Compared to the previous two years, the NPS increased (+48, up from +41 in 2020/21 and +37 in 2019/20).

ITA respondents were particularly positive about the staff knowledge (88%), the straightforwardness of the registration process (88%), the organisation of the service (88%) and the amount of time taken to receive information (86%). Compared to the previous year, more businesses were positive about the clarity of the steps they needed to take when using the service, and the clarity of the steps they needed to take after using the service (81% compared to 77% in 2020/21, and 75% compared to 71%, respectively).

As a result of using ITAs, over half of businesses (56%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all ITA respondents, half (49%) said they had researched the paperwork and regulations needed to export. Fewer businesses said they had done this than in the previous year (49% compared to 56% in 2020/21).
ITA respondents were most likely to report that 'cost' was a barrier to exporting (39%). This was in line with the previous year.

Chart 4.1.2 Net Promoter Score and Satisfaction with service (from Quality Survey) – ITAs



From the Quality Survey 2021-22:
Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used ITAs (n=1,479).
Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used an ITA (excluding 'not applicable' responses) (n=1,446).
Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used ITAs (excluding 'not applicable' responses) (n=1,465).

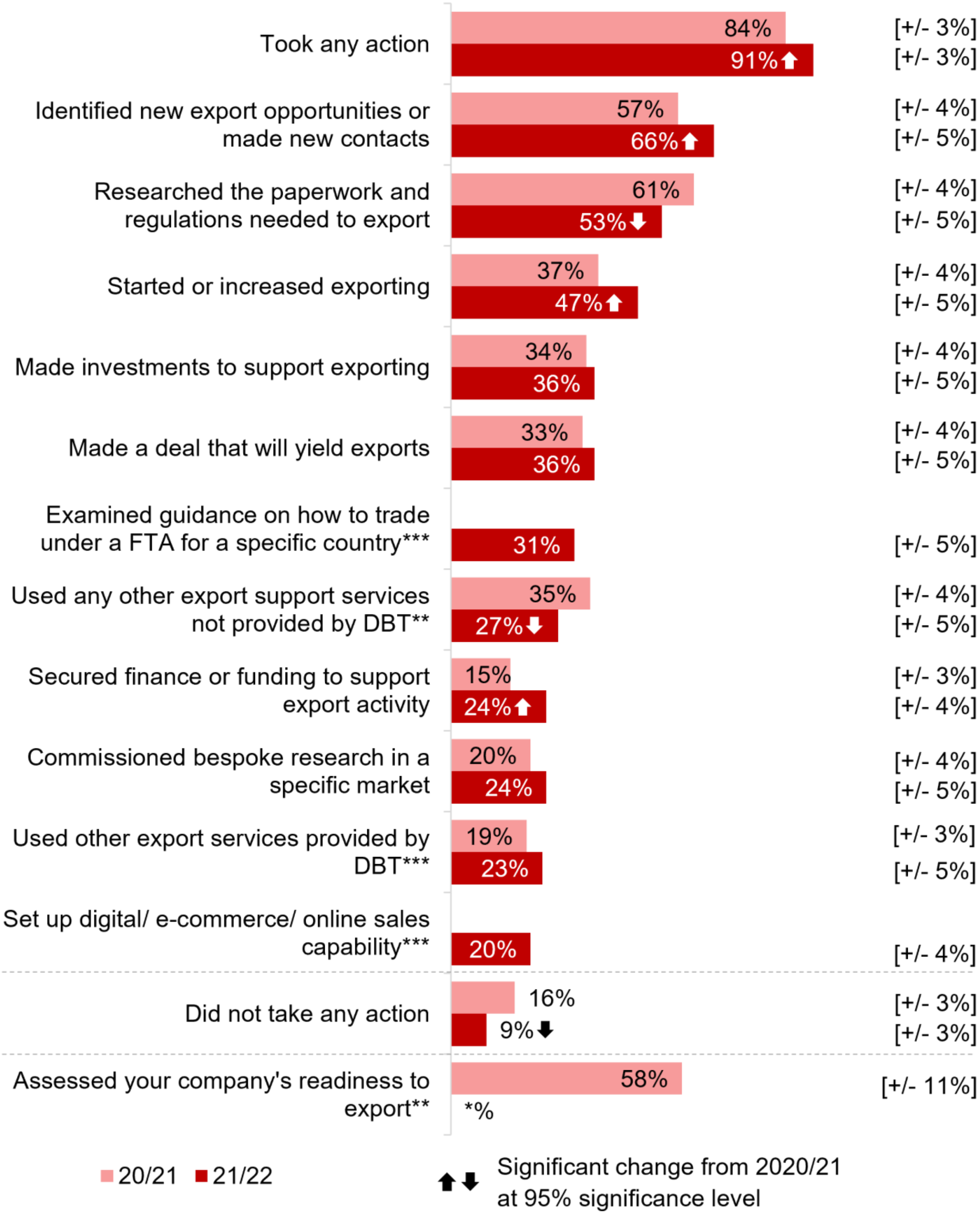
4.1.3 Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the ITA service (Chart 4.1.3). Overall, nine in ten (91%) businesses had taken an action following their use of the ITA service. Two in three businesses reported they had identified new export opportunities or made new contacts (66%), and over half reported they had researched the paperwork and regulations needed to export (53%).

Commissioning bespoke research in a specific market was more common among businesses with a lower turnover of under £500,000 (30%) than among those with higher turnovers (18%).

Compared to the previous year, businesses were more likely to have taken any action (91%, up from 84%). Businesses were also more likely to have identified new export opportunities or made new contacts (66%, up from 57% in 2020/21), started or increased exporting (47%, up from 37%), and secured finance or funding to support export activity (24%, up from 15%). Businesses were less likely to have researched the paperwork and regulations needed to export (53%, down from 61%) and used any other export support services not provided by DBT (27%, down from 35%).

Chart 4.1.3 What the business has done as a result of receiving the service – ITAs



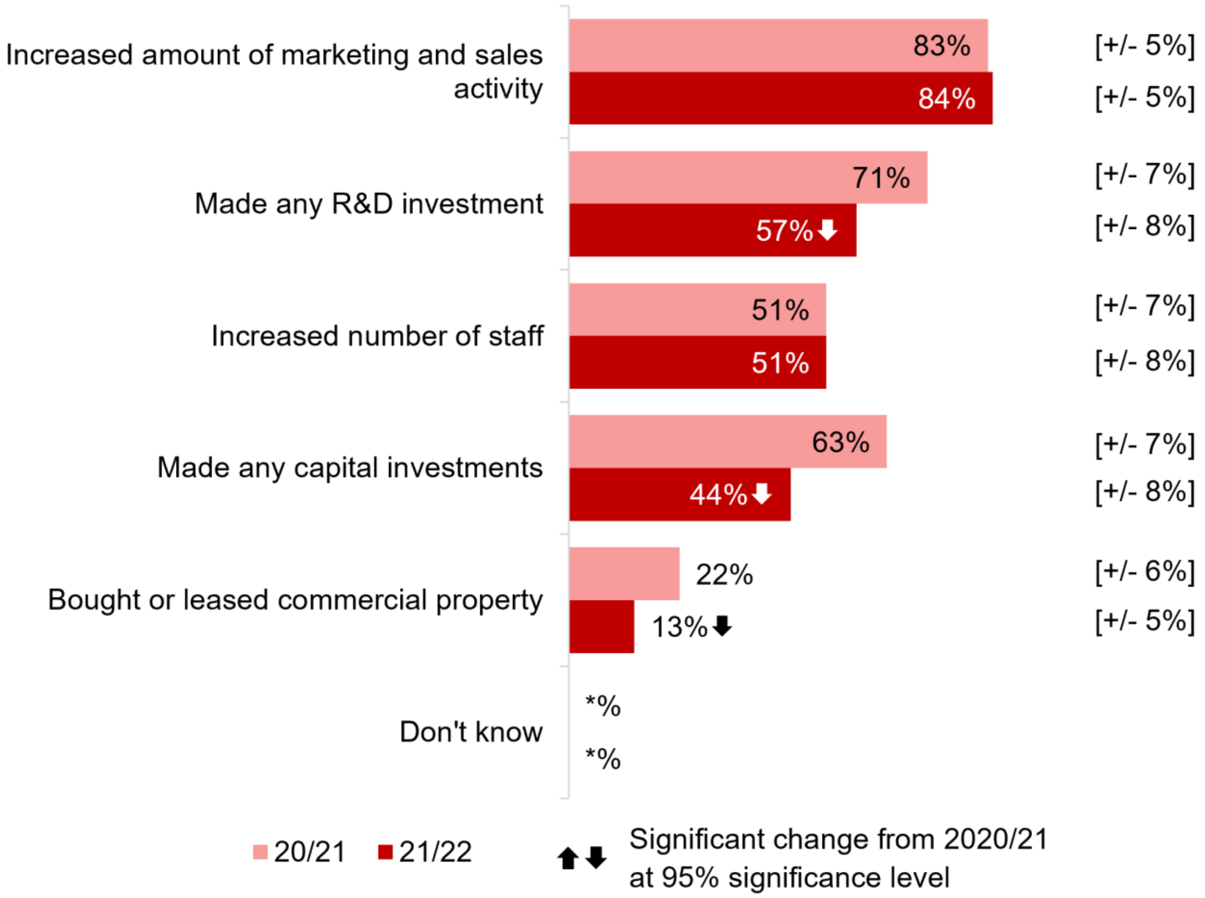
QResultService: What has your business done as a result of the service?
Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21)); All businesses that used ITAs and were non-exporters (n= (2021/22), n=101 (2020/21)). *** Code amended or added in 2021/22; ** Asked to non-exporters only.* Redacted due to small base size*

Businesses that had made an investment as a result of using the ITA service were asked what investments they had made (213 respondents, see Chart 4.1.4). The most common answer was an increase in marketing and sales activity (84%), followed by R&D investment (57%), and increased number of staff (51%).

Businesses with a high turnover of £500,000 or more were more likely to have increased the number of staff (60%) compared with those with lower turnover (33%).

Compared to the previous year, fewer businesses had made any R&D investment (57%, down from 71% in 2020/21), made any capital investments (44%, down from 63%), and bought or leased commercial property (13%, down from 22%).

Chart 4.1.4 Type of investments made to support new or increased export opportunities following using ITAs



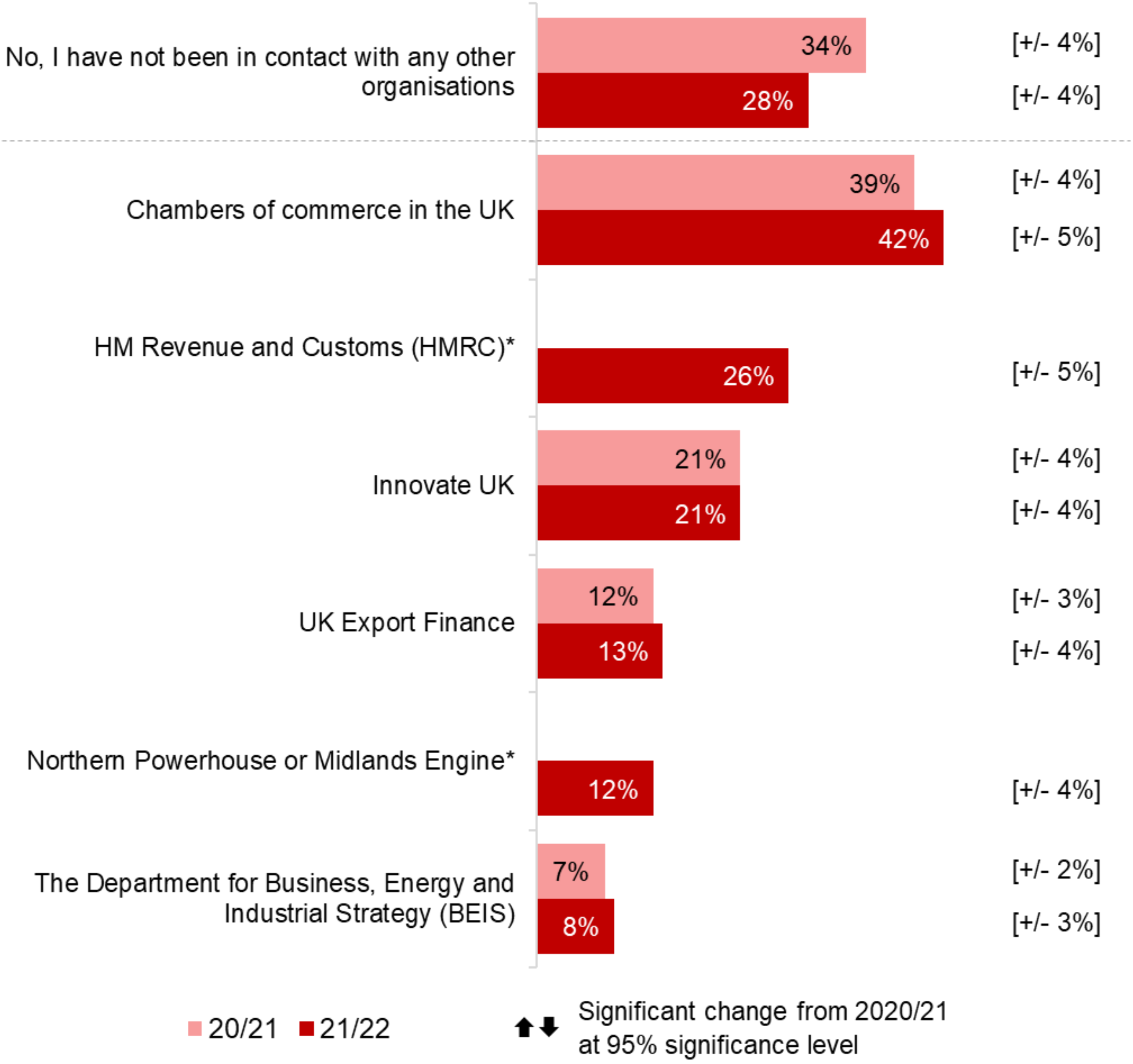
*QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities? Base: All businesses that used ITAs and made investments to support exporting as a result of using ITAs (n=213 (2021/22), n=230 (2020/21)) *Redacted*

Businesses were asked what organisations they had been in contact with since using ITAs. Four in ten (42%) had been in contact with the British Chambers of Commerce, one quarter (26%) had been in contact with HMRC, and one in five (21%) had been in contact with Innovate UK. Around three in ten (28%) businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Businesses from the North West were more likely to have been in contact with Innovate UK compared to overall (34% and 21% respectively). Businesses with a turnover of £500,000 or more were more likely to have contacted the British Chambers of Commerce than businesses with a turnover of less than £500,000 (43% and 30% respectively).

In addition to the organisations shown in Chart 4.1.5, businesses were asked whether they had been in contact with any other organisations or sources of information (not shown in the chart). In comparison to RIS 2020/21, businesses were less likely to have been in contact with business, professional or trade bodies (3%, down from 9% in 2020/21). Businesses were also less likely to have been online or on Google (4%, down from 16% in 2020/21), or in contact with friends/colleagues (3%, down from 13%), private consultant advisors (3%, down from 7%) or Local Enterprise Partnerships (1%, down from 7%). However, these are in line with the 2019/20 findings, in which 1% of businesses had been online or on Google, 1% had been in contact with friends/colleagues, 2% with private consultant advisors and 1% with Local Enterprise Partnerships.

Chart 4.1.5 What organisations respondents have been in contact with since receiving the service – ITAs



QAnyContact: Since your business used the service 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 businesses that used ITAs (n=563 (2021/22), n=661 (2020/21)). Coded responses with 5% or more in 2021/22 are included. * Code amended or added in 2021/22*

4.1.4 Reported impact on exporting

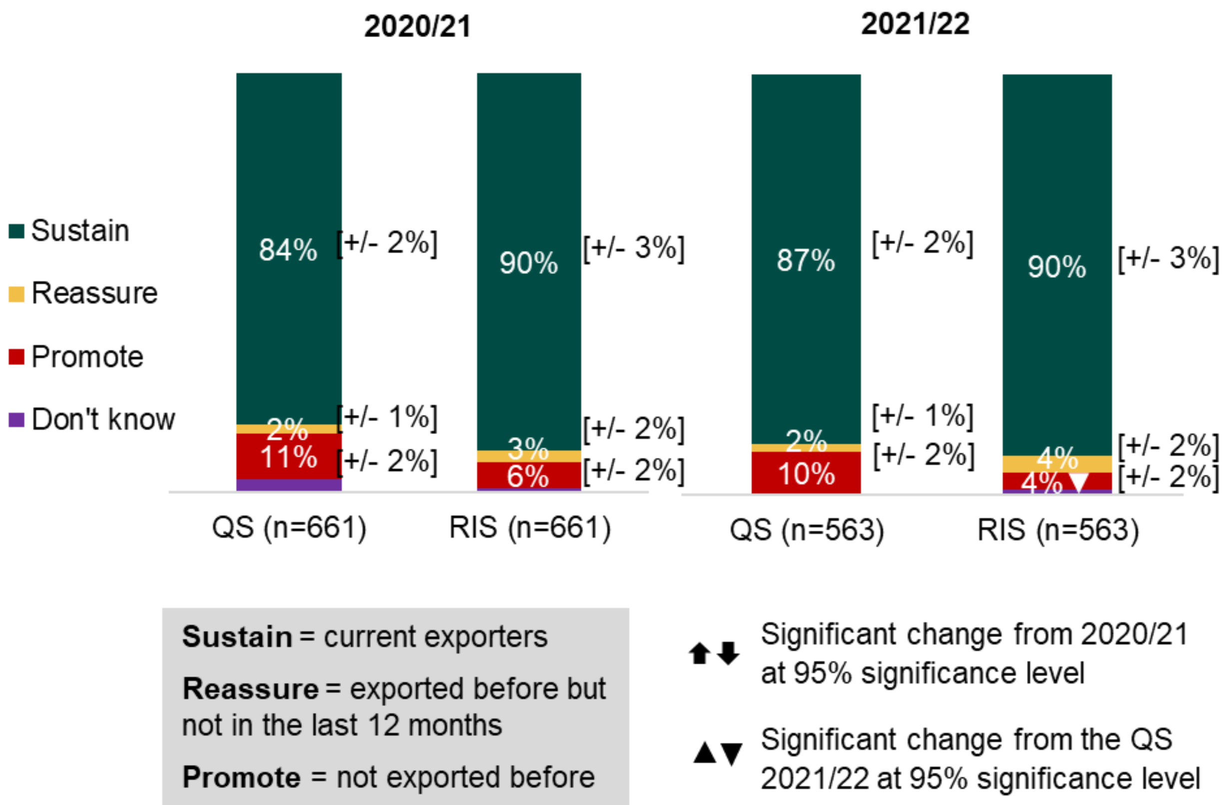
Businesses that used ITAs were asked about their export status, both at the time they accessed the ITA service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DBT has grouped UK businesses into segments, which reflect businesses' views on their potential to export (Chart 4.1.6). These segments include:

- **Sustain:** refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around nine in ten businesses (87%) that used ITAs fell into this segment at the time of the service delivery (QS 2021/22). This was in line with the RIS 12 months later (90%).

- **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. Among ITA users, 2% fell into this segment at the time of the service delivery (QS 2021/22), and this was similar 12 months later (4%).

- **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 ten (10%) that used ITAs were in this segment at the time of the service delivery (QS 2021/22). This decreased 12 months later to 4%.

Chart 4.1.6 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – ITAs



Source: Composite measure merging data from several variables.
Base: All businesses that used ITAs and completed both surveys (Quality Survey: n=563 (2021/22), n=661 (2020/21); RIS: n=563 (2021/22), n=661 (2020/21))

The export status of some businesses changed between the time of the service delivery and 12 months later in the RIS (see Table 4.1.1).

Table 4.1.1 Change in export status at time of the service delivery (QS) and 12 months later (RIS) – ITAs

Quality Survey Export status	RIS Export status	Percentage	Change since 2020/21
Sustain (n=497)	Sustain	**96%** [+/- 2%]	-
	Reassure	**c**	-
	Promote	**c**	-
Reassure (n=c)	Sustain	**c**	-
	Reassure	**c**	-
	Promote	**c**	-
Promote (n=c)	Sustain	**c**	-
	Reassure	**c**	-
	Promote	**c**	-

c Cells have been suppressed to protect confidentiality

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

Considering businesses that were in the Sustain segment at the time of the Quality Survey (497 businesses), 96% continued in Sustain.

4.1.5 Reported export contracts achieved since receiving the service

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

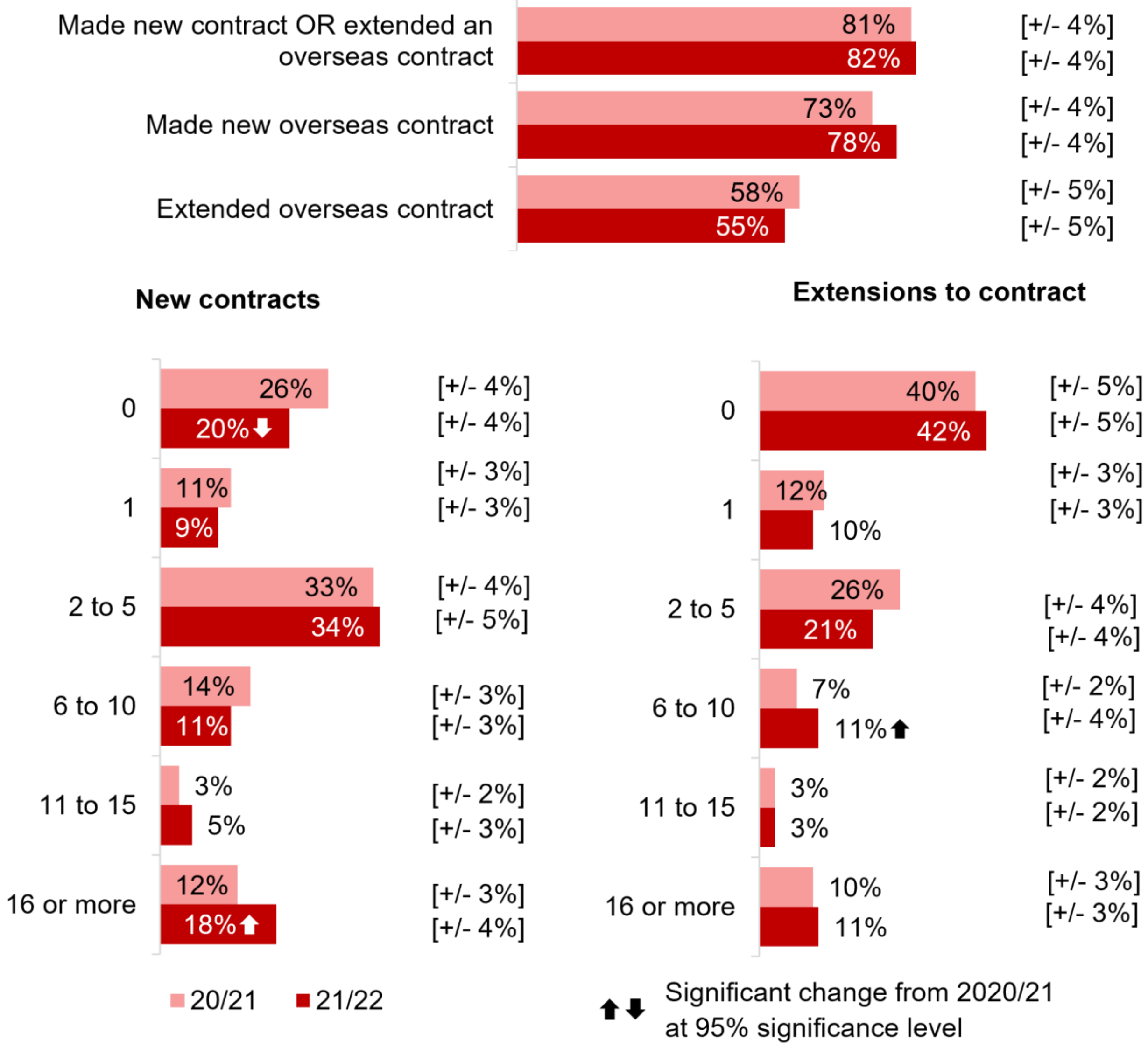
Of the 90% of businesses that had exported, 82% reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service. This was in line with RIS 2020/21 (81%) and RIS 2019/20 (82%).

Around three-quarters (78%) of these exporting businesses had won new overseas business contracts in the year since they used the service (Chart 4.1.8). Specifically, 9% had won one overseas contract, and a third (34%) had won between two and five overseas contracts. Nearly one in five (18%) businesses had won more than 16 overseas contracts, an increase from the previous year (12%). The median number of contracts won among exporting businesses that had used ITAs was two, in line with the previous year.[5]

Over half (55%) of exporting businesses that used ITAs reported they had gained extensions to existing overseas business contracts in the year since they used the service (Chart 4.1.8). Specifically, 10% extended one contract, and a fifth (21%) extended between two and five contracts. One in ten (11%) extended more than 16 existing overseas sales contracts. Around four in ten (42%) businesses had not extended any existing contracts. The median number of contracts extended (including those that did not extend any) was less than one.

[5] This is taken from the 90% that exported and could also provide a figure for the number of contracts won. It includes those that export but did not win any new contracts in the 12 months since they used the service.

Chart 4.1.7 Proportion of businesses that exported and reported they had made new overseas contracts and / or extended existing contracts, and number of contracts made in previous 12 months – ITAs[6]



QNewcontract: How many new overseas business contracts for export sales did you win in the past year?
QExtendcontract: How many extensions to existing overseas business contracts for export sales did you win in the past year?
Base: All businesses that used ITAs and were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=516 (2021/22), n=590 (2020/21)); All businesses that used ITAs and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=510 (2021/22), n=587 (2020/21))

Reported additional contracts which were gained because of DBT support

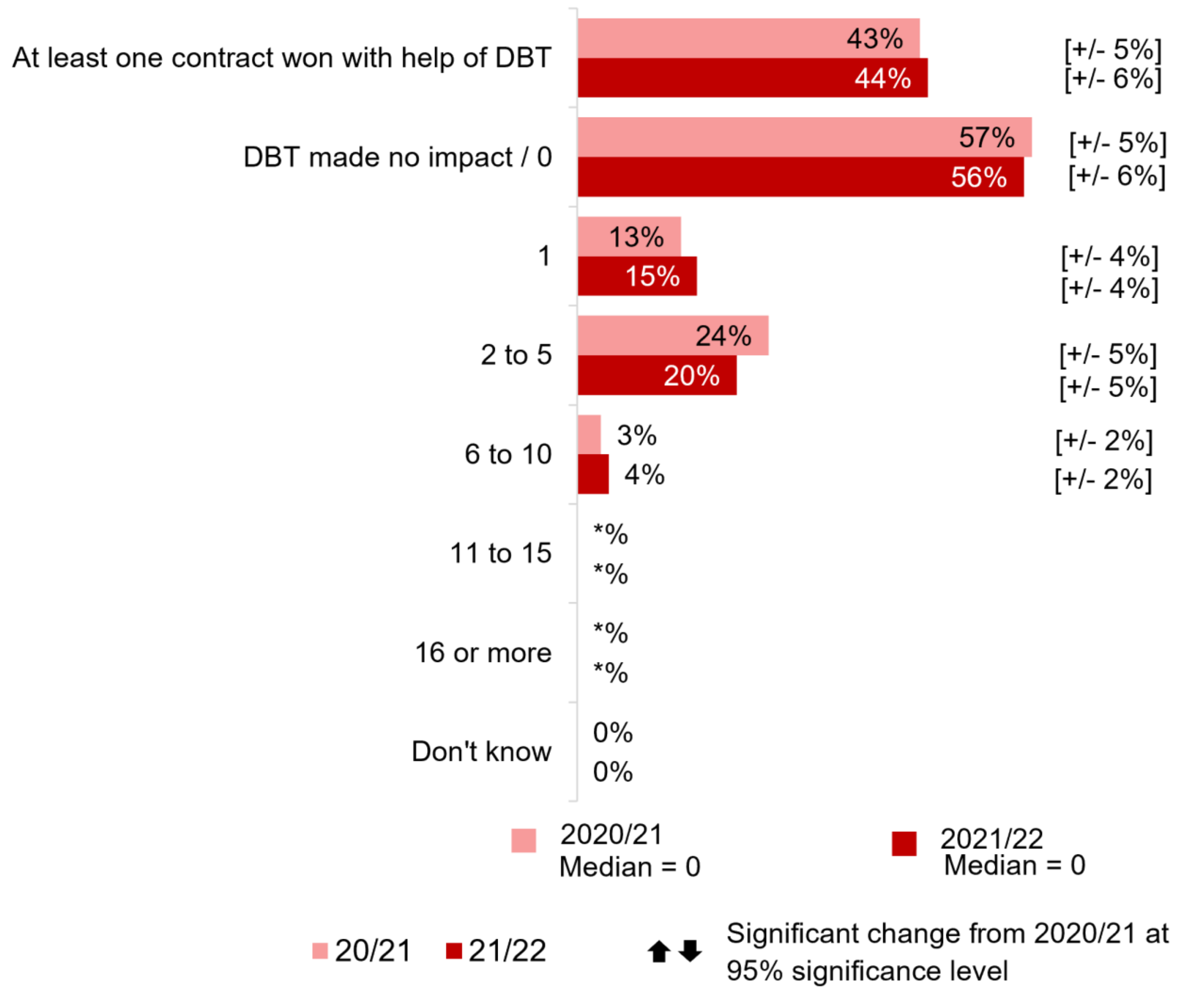
Businesses that exported and that had won at least one new contract in the 12 months since the delivery of the ITA service were asked whether they could estimate the number of contracts won with the assistance of ITAs or DBT. In total, 386 businesses (that is 69%

[6] The total percentage of all responses for this question may not sum to 100% due to rounding.

of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.1.8 below, over half of these businesses (56%) said they won no new overseas sales contracts with the help of DBT, or using DBT services made no impact. Around one in six (15%) had won one new overseas contract, and one in five (20%) had won between two and five contracts. The median number of contracts that DBT helped win was zero[7], for current exporters that used ITAs. This was in line with the previous year (RIS 2020/21).

Chart 4.1.8 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – ITAs

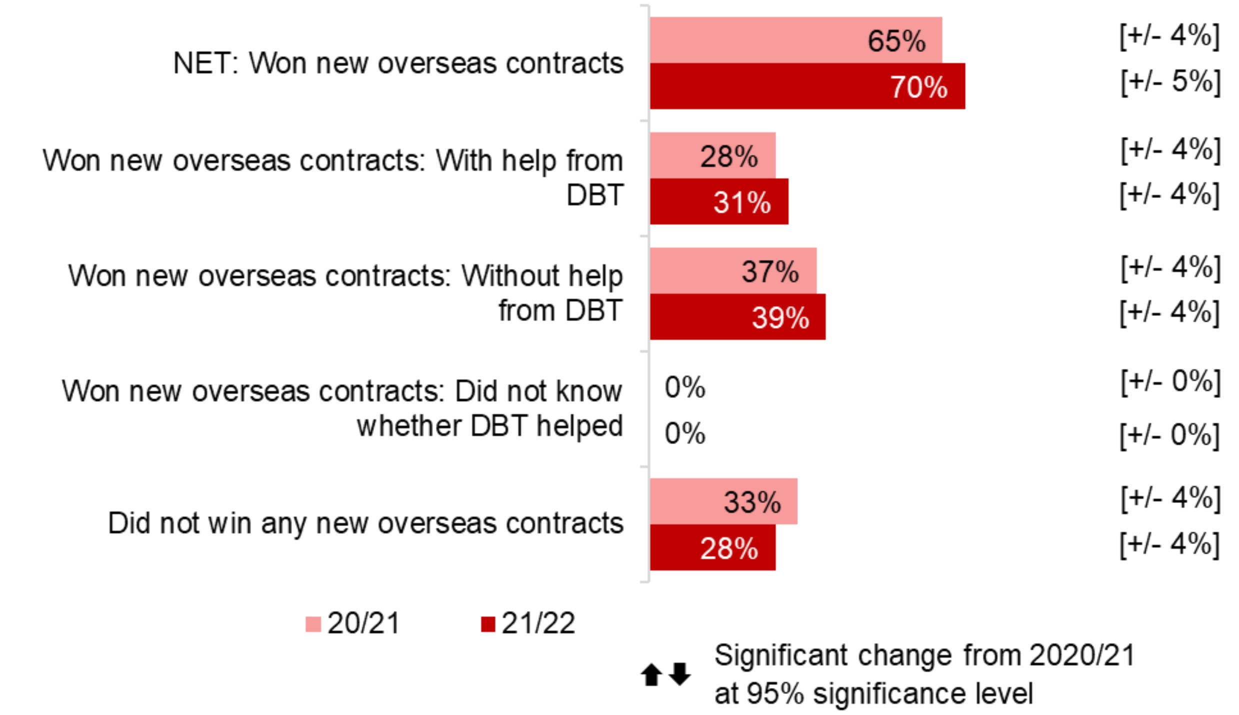


QContractDIT: Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DBT?
QContractNumber: How many new overseas contracts were won with help from DBT?
*Base: All businesses that used ITAs and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=386 (2021/22), n=425 (2020/21)). Median values include zero. *Readcted*

[7] This includes businesses that reported the ITA service did not help them to win any contracts.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.1.9). Among all businesses that had used ITAs, 70% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, we estimate that 31% of ITA respondents had won contracts with help from DBT, while 39% of ITA respondents said they had won contracts without help from DBT. This was in line with the previous year[8].

Chart 4.1.9 Proportion of businesses reported to have won or not won new overseas contracts, and the proportion of businesses estimated to have won new overseas contracts with or without DBT support – ITAs



Source: Composite measure merging data from several variables.
Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21))

Importance of DBT's support in winning overseas contracts

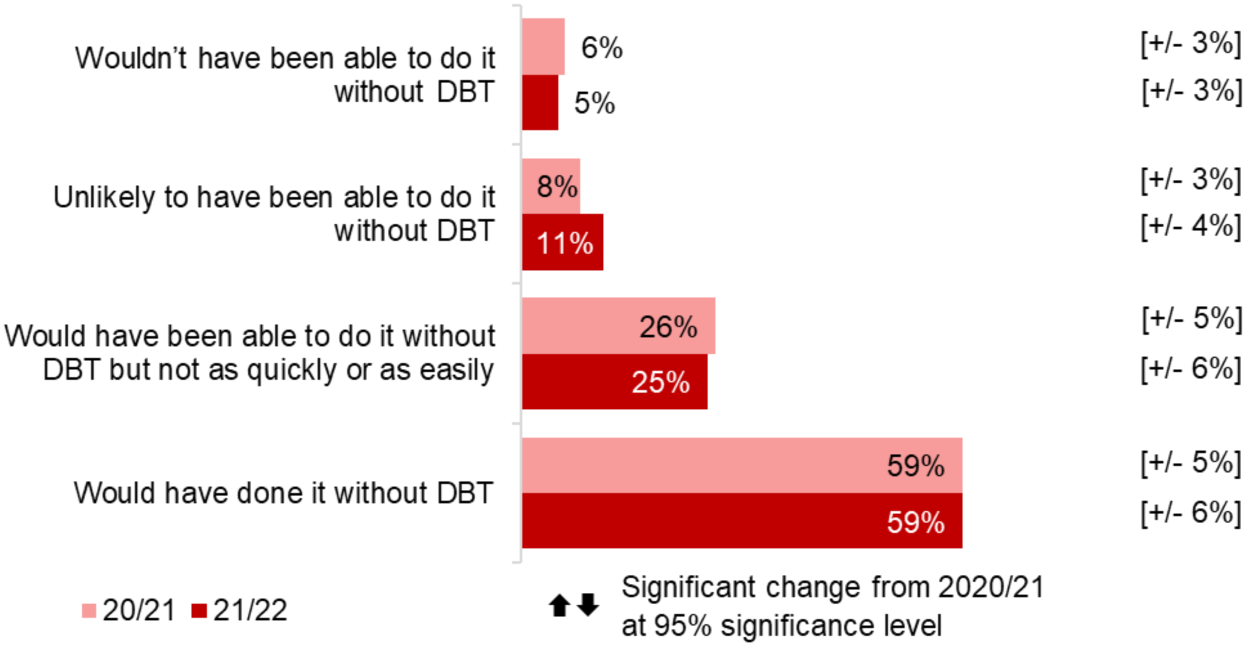
The survey explored views on the importance of DBT's support in winning overseas contracts. This question was asked to businesses that reported they had won at least one overseas business contract with the help of DBT in the last 12 months, since the delivery of the ITA service. Exporting businesses who said that DBT made no impact or did not help them win any new contracts were not asked this question. However, they have been included under 'would have done it without DBT' to better understand the level of support that the ITA service provided (Chart 4.1.10).

Two fifths of these businesses (41%) reported that DBT support was important in helping them win these contracts to some extent. This includes 5% who said they would not have been able to do it without DBT, and 11% who thought it was unlikely they could have done

[8] Please refer to the annex and survey technical report for a more detailed explanation of this measure.

it without DBT. A quarter (25%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.1.10). The remaining 59% thought they would have been able to achieve the same outcome without DBT support. These results are in line with the previous year.

Chart 4.1.10 How important DBT's help was in winning overseas contracts – ITAs



QContractHelp: How important was DBT's help in winning these overseas contracts?
Base: All businesses that used ITAs and won any new overseas contracts in the past year (n=386 (2021/22), n=425 (2020/21))

4.1.6 Reported value of export sales achieved since receiving the service

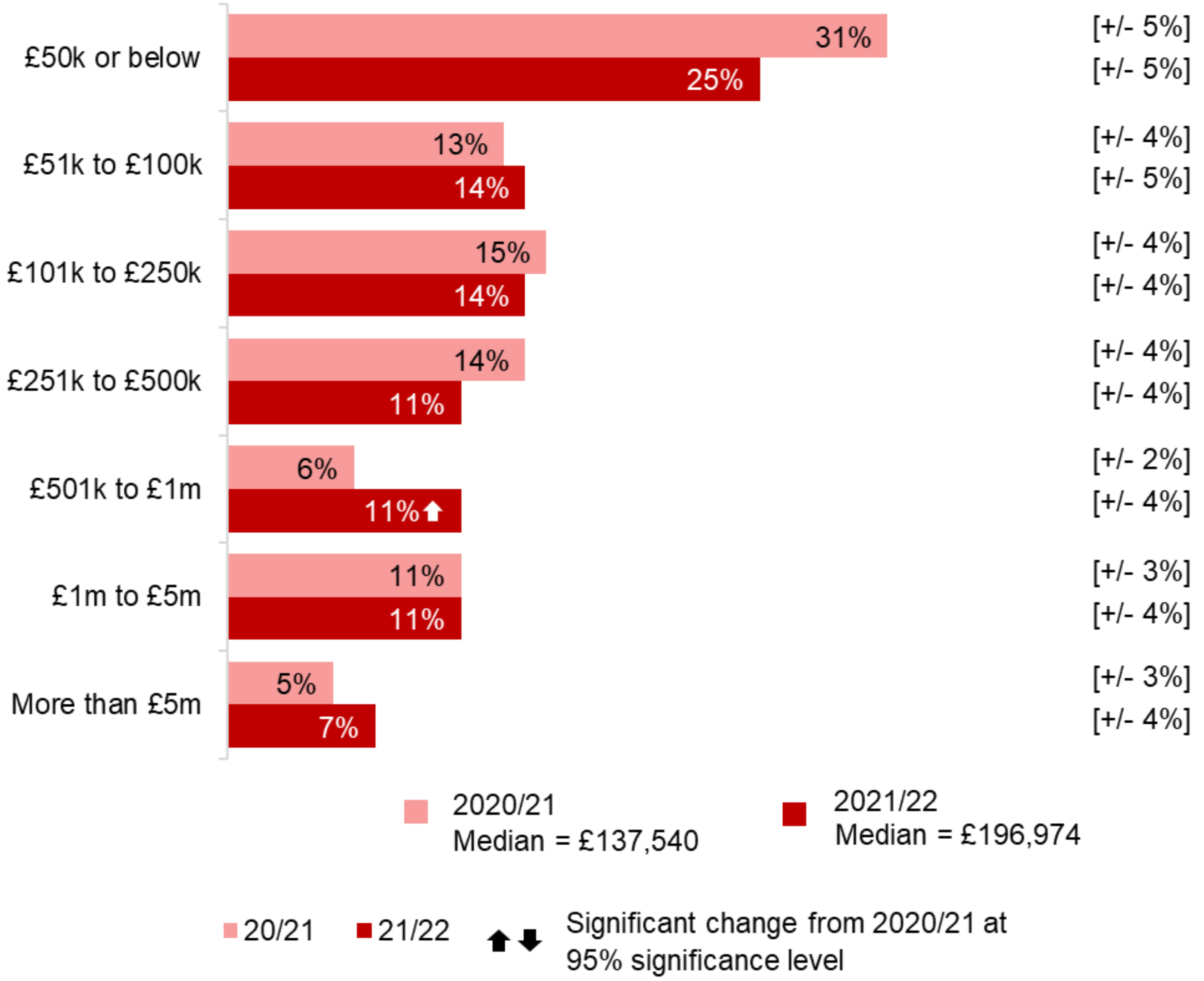
Reported value of the export sales of new contracts

The 70% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts, in total (Chart 4.1.11). The median value of the export sales of all new overseas contracts for these businesses was £196,974 (compared to £137,500 in RIS 2020/21 and £147,500 in RIS 2019/20).[9] One quarter (25%) had won contracts with an export sales value of £50,000 or below. One in ten (11%) said that the export sales value of the new overseas contracts won was more than £1 million.

Compared to RIS 2020/21, a larger proportion of businesses reported winning new contracts of £501,000 to £1 million (11%, up from 6% in 2020/21).

[9] Values are not adjusted for inflation when comparing to 2020/21.

Chart 4.1.11 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 businesses that used ITAs and won any new overseas business contracts (n=386 (2021/22), n=425 (2020/21))

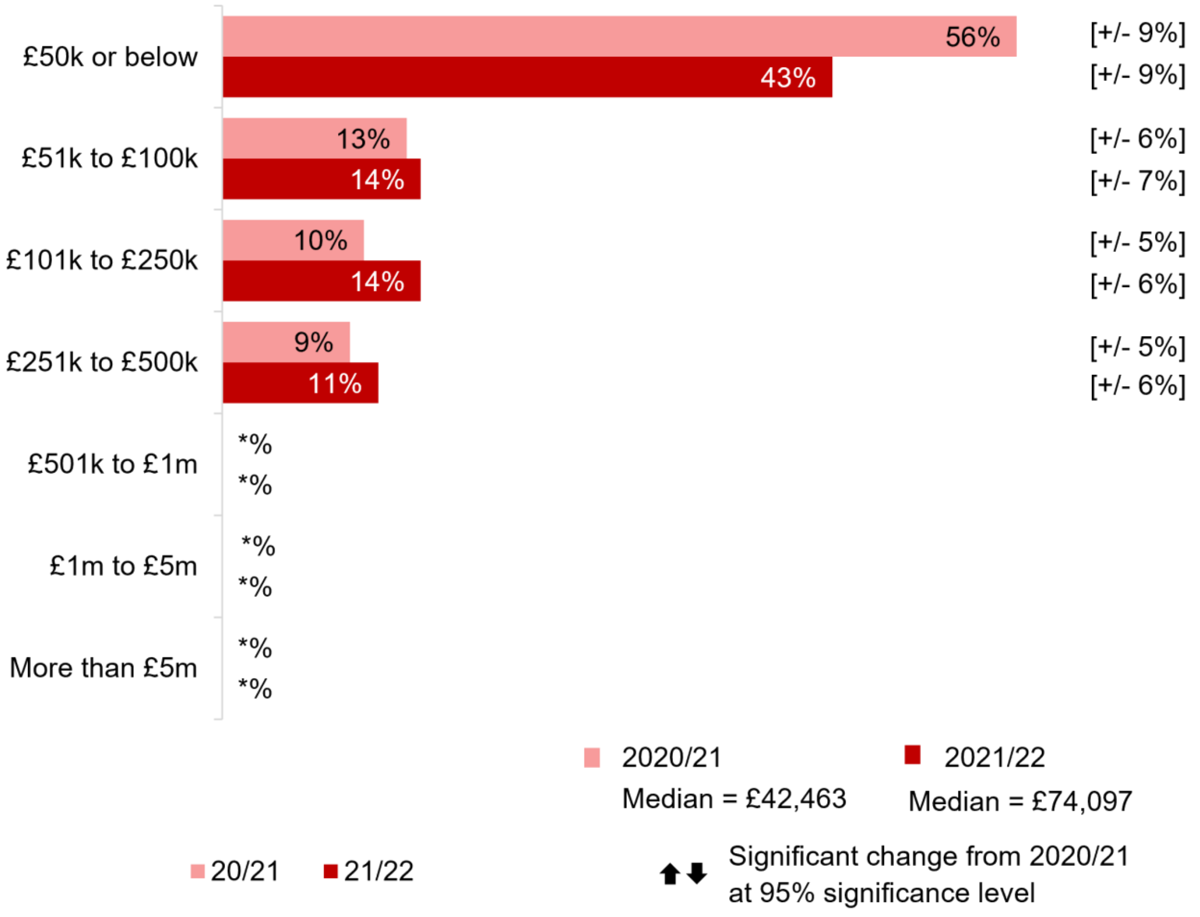
Reported additional value of DBT support

This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the ITA service, they were asked to think about the impact from all of their interactions with DBT. The analysis in this section measures the additional contribution that DBT made towards businesses outcomes, including the number and value of new overseas contracts made.

Businesses were asked to estimate the value of new overseas business contracts that they had won with DBT support (Chart 4.1.12). This data was used to estimate the 'reported additional export sales' – that is, the reported additional impact of using DBT services on export sales. The reported additional export sales for ITAs were £74,097, across all the contracts that ITAs helped businesses to win (compared to £42,463 in RIS 2020/21 and £43,000 in RIS 2019/20). Note that this does not include businesses that did not win any new export contracts, or businesses that said DBT made no impact on overseas contract wins.

Two fifths (43%) reported additional export sales of £50,000 or below, and 14% reported additional new export sales of between £51,000 and £100,000.

Chart 4.1.12 Value of new overseas contracts helped by DBT support in previous 12 months – ITAs

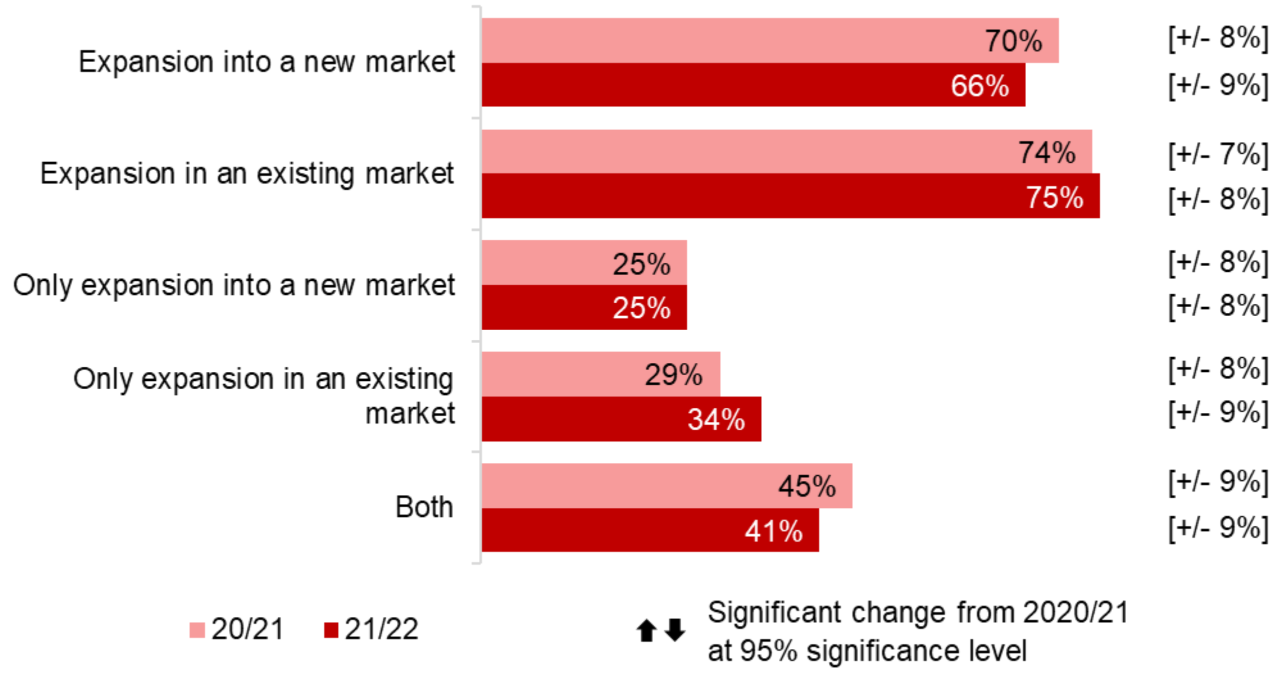


QContractValueDIT: What was the value of these new overseas business contracts that your business won with the help of support from the service or DBT last year?
Base: All businesses that used ITAs and won any new overseas business contracts with the help of DBT (n=166 (2021/22), n=168 (2020/21))

4.1.7 Recorded exposure and growth within new markets

Businesses were asked whether new contracts they had won represented expansion into a new market, expansion within an existing market, or both (Chart 4.1.13). This question was asked to businesses that said DBT support helped them to win new overseas contracts and were able to provide details of the number and value of these contracts. Two thirds (66%) of businesses said they were assisted with expansion into a new market and three-quarters (75%) said they were assisted with expansion within an existing market. This includes 25% who said that DBT helped them expand into new markets (but not existing markets), and 34% who expanded within an existing market (but not into new markets). Two fifths (41%) reported that DBT helped them expand into both existing and new markets. These results are in line with the previous year.

Chart 4.1.13 Whether new contracts won with DBT's help represented expansion into new markets or existing markets – ITAs

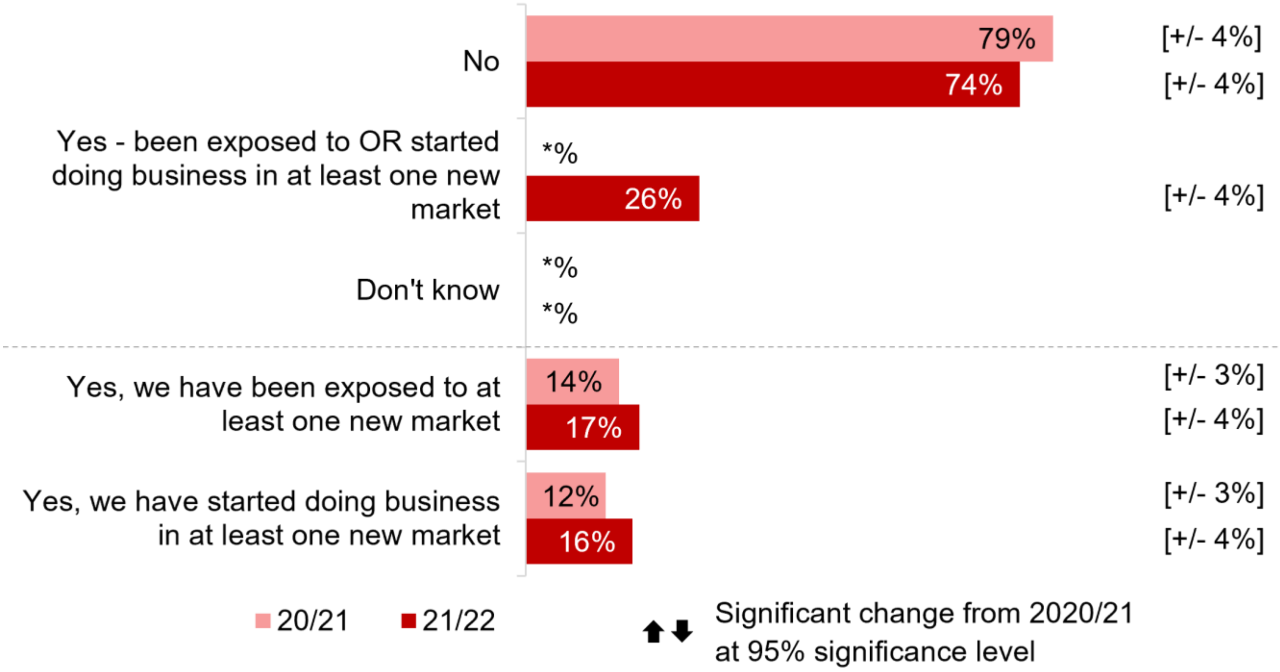


QContractRepresent: Did these new overseas contracts represent …?
Base: All businesses that used ITAs and won any new overseas business contracts with the help of DBT (n=166 (2021/22), n=168 (2020/21))

All businesses that used ITAs were asked whether they had increased their exposure or started doing business in any new markets because of using the ITA service[10] (Chart 4.1.14). Similar proportions of businesses said they had been exposed to at least one new market (17%) and had started doing business in at least one new market (16%) as a result of using the ITA service. These results are in line with the previous year.

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

Chart 4.1.14 Whether increased exposure or starting business in a new overseas market – ITAs



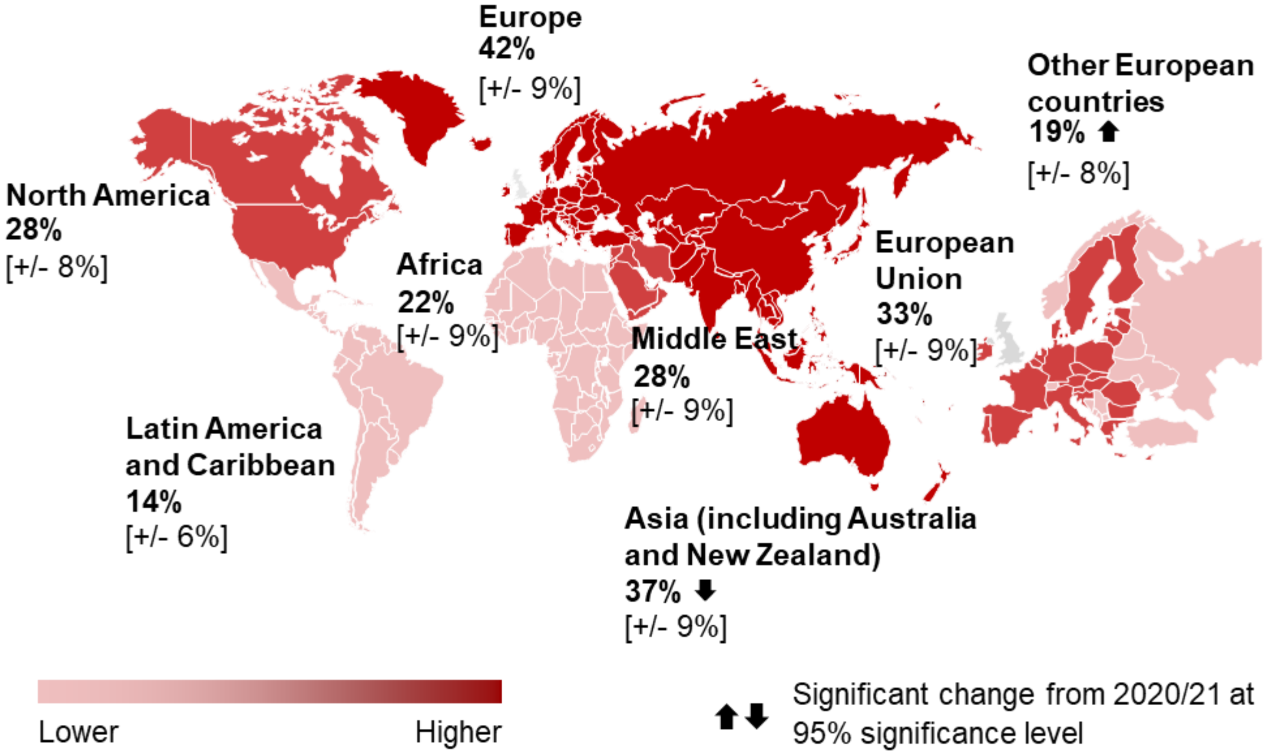
QGrowthDIT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
*Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21)) *Redacted*

The most common new market for increased exposure or business was Europe (42%), followed by Asia (including Australia and New Zealand) (37%), the Middle East (28%) and North America (28%). This can be seen below in Chart 4.1.15 and Table 4.1.2. Looking in more detail at Europe, 33% reported that their increased exposure or new business was within the European Union, while 19% had new or increased exposure in other European countries.

Compared to the previous year, Europe replaced Asia as the most common new market for increased exposure or business. This was in line with the RIS 2019/2020 survey, when Europe was previously the most common new market for increased exposure or business.

Businesses were less likely to report increased exposure in Asia (37% compared to 53% in 2020/21). Businesses were more likely to report increased exposure in non-EU European countries (19% compared to 8% in 2020/21), although findings for within the EU and Europe overall remained in line with the previous year.

Chart 4.1.15 The new markets that the organisations have started doing business in or been exposed to – ITAs



QNewRegion: Which of the following new markets has your business started doing business in or been exposed to?
Base: All businesses that used ITAs and have had increased exposure to, or started doing business in at least one new market (n=147 (2021/22), n=123 (2020/21))

Table 4.1.2 The new markets that the organisations have started doing business in or been exposed to – ITAs

Region	2020/21	CI (+/-)	2021/22	CI (+/-)	Change[11]
Europe	**31%**	8%	**42%**	9%	-
European Union	**28%**	8%	**33%**	9%	-
Other European countries	**c**		**19%**	8%	↑
Asia (including Australia and New Zealand)	**53%**	8%	**37%**	9%	↓
Middle East	**23%**	7%	**28%**	9%	-
North America	**20%**	7%	**28%**	8%	-
Africa	**17%**	7%	**22%**	9%	-
Latin America and Caribbean	**12%**	7%	**14%**	6%	-
Base	*123*	-	*147*	-	-

c Cells have been suppressed to protect confidentiality

4.1.8 Barriers to exporting

Businesses were asked in both the Quality Survey and Reported Impact Survey about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)[12] (Chart 4.1.16).

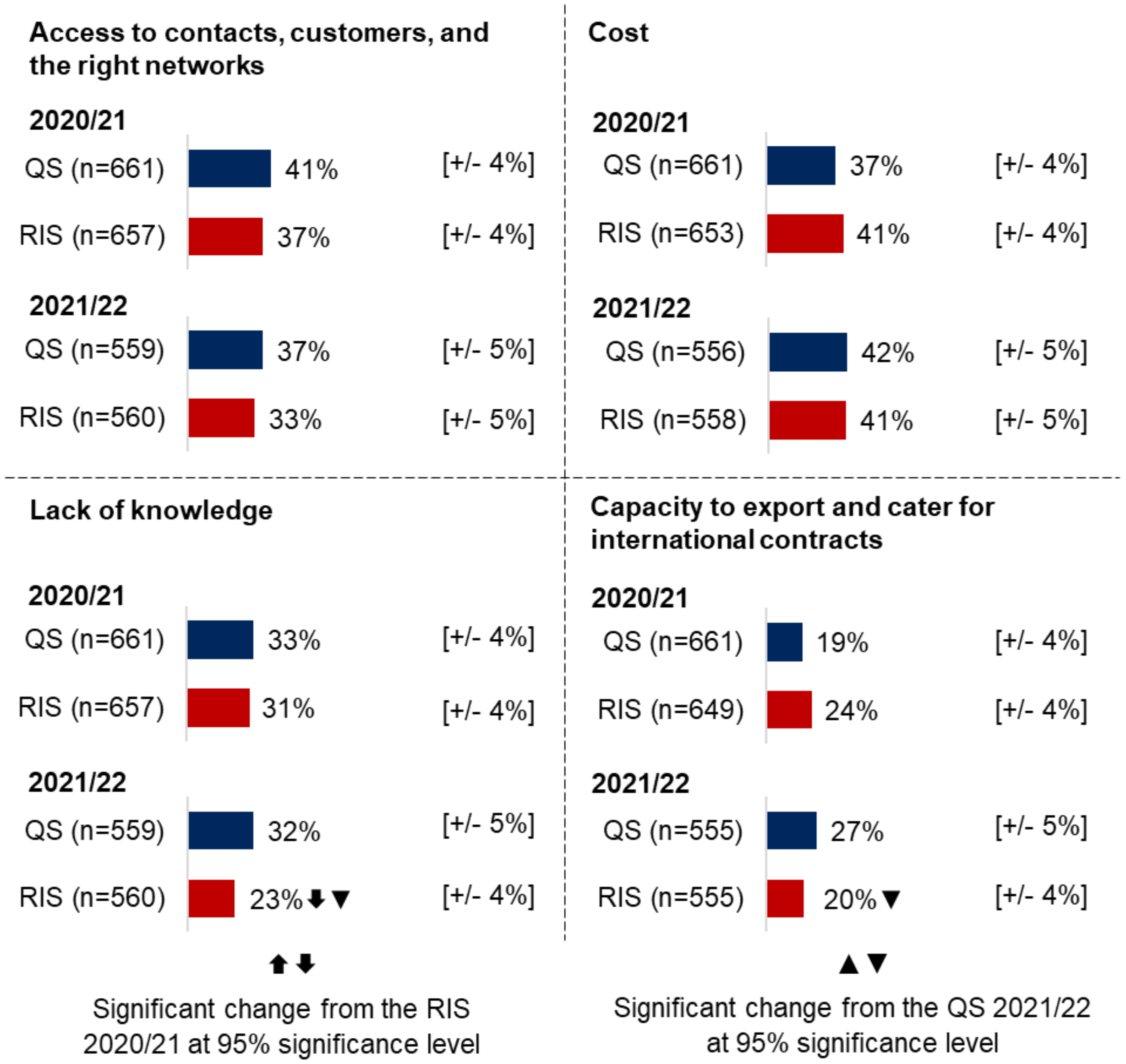
The top barrier in RIS 2021/22 was ‘cost’ (41%), followed by ‘access to contacts’ (33%).

Compared to these businesses’ responses in the QS 2021/22, businesses were less likely to report ‘lack of knowledge’ (23%, down from 32% in QS 2021/22) and ‘capacity to export and cater for international contracts’ (20%, down from 27% in QS 2021/22) as barriers.

Compared to the previous year, fewer businesses reported that ‘lack of knowledge’ (23% compared to 31% in 2020/21) was a barrier to exporting.

[11] Charts and tables represent a statistically significant increase from 2019/20 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.
[12] This section compares results for businesses who completed both surveys and provided a response to this question in both surveys. Businesses that said a barrier was not applicable in either survey were excluded.

Chart 4.1.16 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – ITAs[13]



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 was the following for your business when it comes to exporting? A barrier is defined as a score between 7 and 10.
Base: All businesses that used ITAs not including those who gave a 'not applicable' answer.

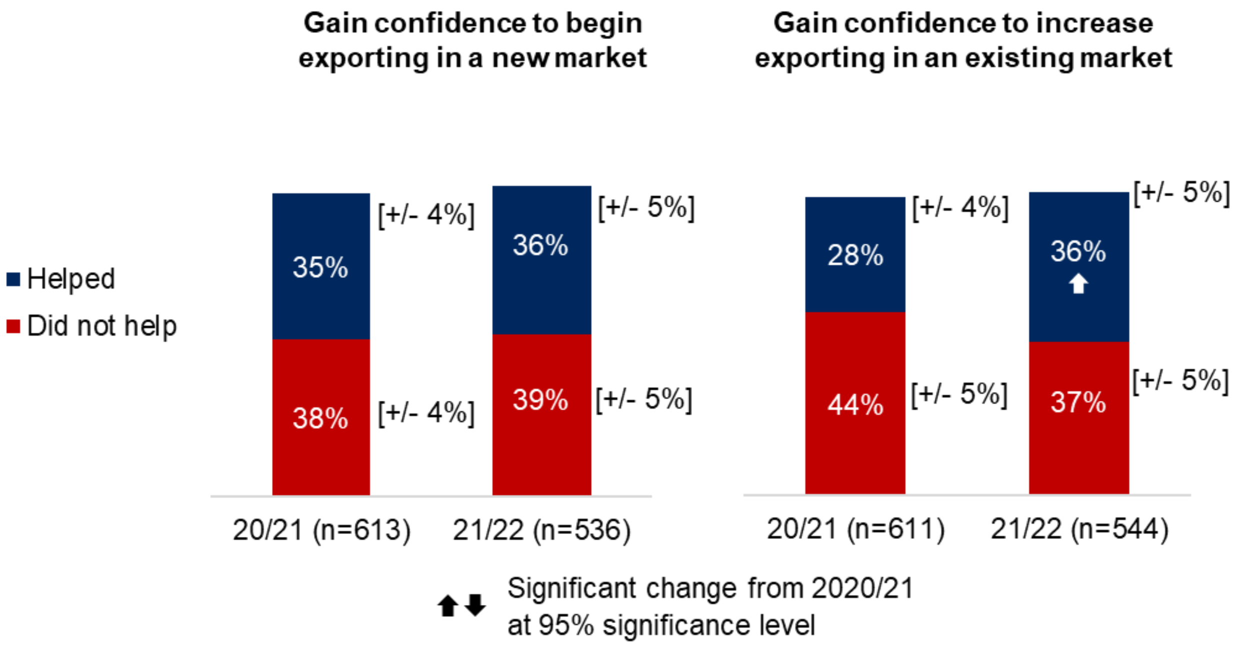
[13] The percentages shown in this chart are for businesses that rated a factor as 7-10 out of 10 when asked how much of a barrier it is.

4.1.9 Wider benefits of the service

Businesses were asked to think about the extent to which using the ITA service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market (Chart 4.1.17). Four in ten businesses reported that using the ITA service had not given them confidence to begin exporting in a new market (39%) or to increase exporting in an existing market (37%). A similar proportion (36%) reported the opposite, that using the ITA service had given them confidence to begin exporting in a new market and an equal proportion (36%) reported that it given them confidence to increase exporting in an existing market.

Compared to the previous year, more businesses reported that using the ITA service boosted their confidence in exporting in an existing market (36% compared to 28% in 2020/21).

Chart 4.1.17 To what extent using the ITA service helped to build confidence to export – 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 the service help you to …? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used ITAs not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge[14].** Chart 4.1.18 below shows how businesses rated the impact of using the ITA service on their knowledge.

On balance, more businesses reported that using the ITA service was **helpful for increasing their knowledge of support available to them (from DBT and elsewhere)**. Over four in ten (44%) said the service helped to do this, and three in ten (28%) said it did not help them do this. These findings were in line with the previous year (2020/21).

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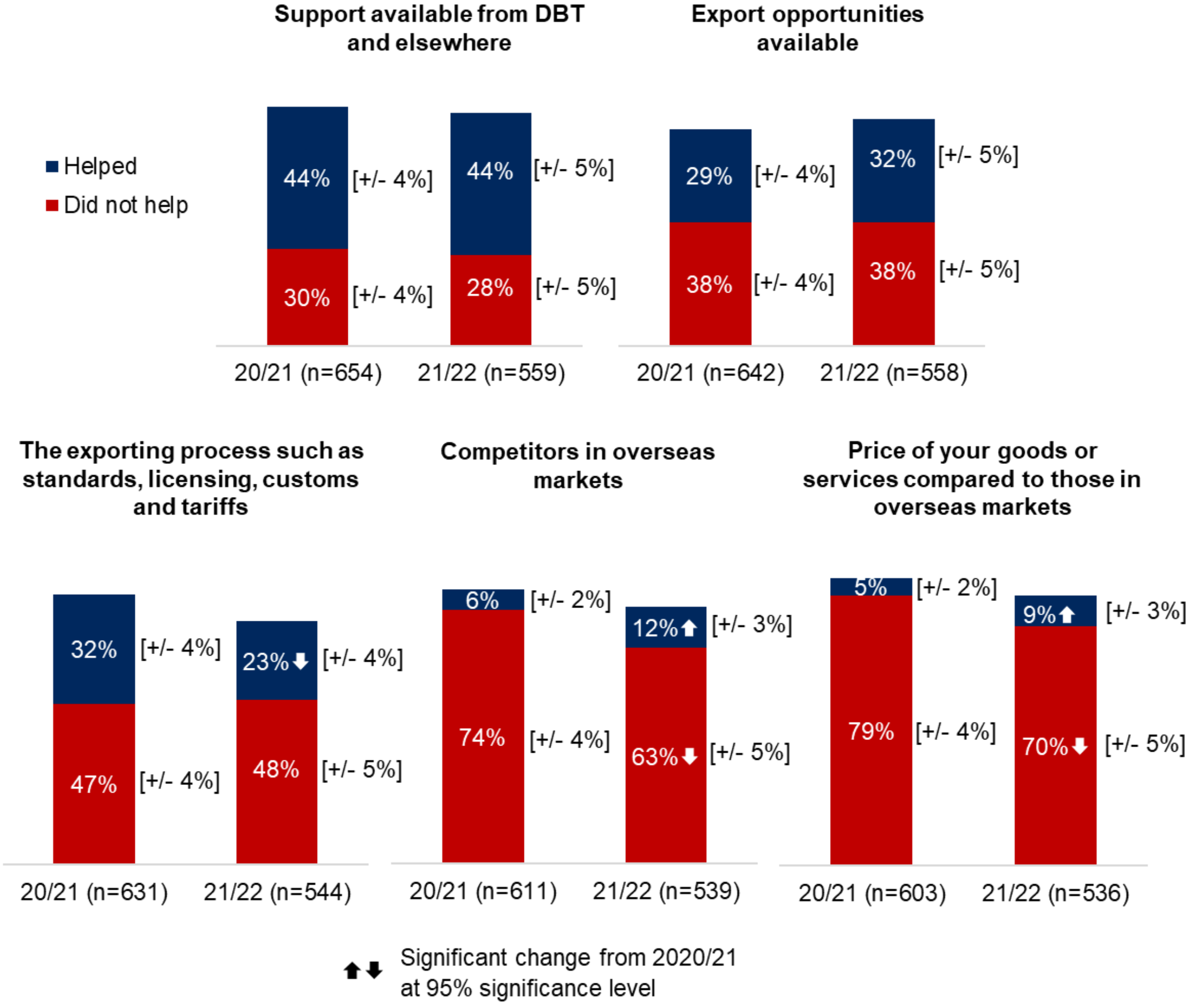
[14] Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

However, more businesses on balance reported that using the ITA service was **not helpful for increasing their knowledge of export opportunities available** or **improving their knowledge of the exporting process**. Three in ten businesses that had used ITAs (32%) said that the service had helped them to increase their knowledge of the export opportunities available. Four in ten (38%) said they were not helped in this way. This was in line with the previous year.

Half (48%) of businesses said that the service did **not help to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs; a quarter (23%) of businesses that had used ITAs said the service did help them in this way. This represents a significant decrease from the previous year, when a third (32%) felt that the service helped them in this way.

Relatively small proportions said that using ITAs improved their **knowledge of the price of goods** compared with those in overseas markets (9%) or about their **competitors in overseas markets** (12%). However, in comparison to RIS 2020/21, these were both increases (from 5% and 6% respectively).

Chart 4.1.18 To what extent the business felt that their knowledge has improved 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 the service? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used ITAs not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Businesses were asked about other ways they had benefitted from using ITAs in the year between dealing with the ITA and taking part in the RIS.[15] A detailed breakdown of responses is shown in Chart 4.1.19.

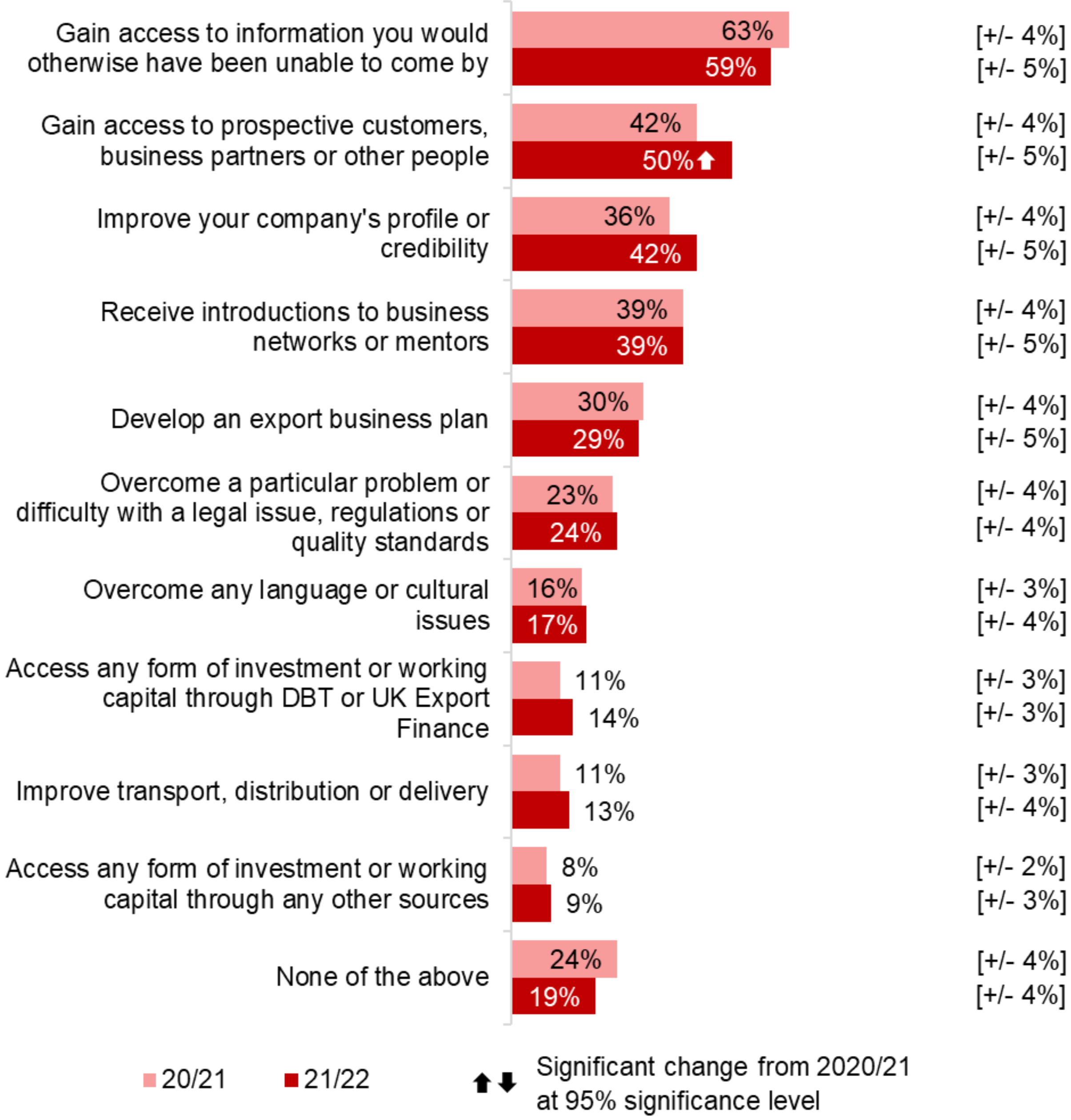
The top responses were: helping businesses to gain access to information that they would otherwise have been unable to come by (59%), or gaining access to prospective customers, business partners or other people that they otherwise would have been unable to meet (50%). A fifth (19%) felt that using the ITA service had not helped them in any of the ways listed.

Compared to RIS 2020/21, there was an increase in the proportion of business that gained access to prospective customers, business partners or other people that they otherwise

[15] Respondents were asked to select from a pre-coded list and had the option to provide an 'other' answer

would have been unable to meet, from 42% to 50%. There were no other significant changes compared to RIS 2020/21.

Chart 4.1.19 In what ways has the business felt it had benefited from DBT support – ITAs

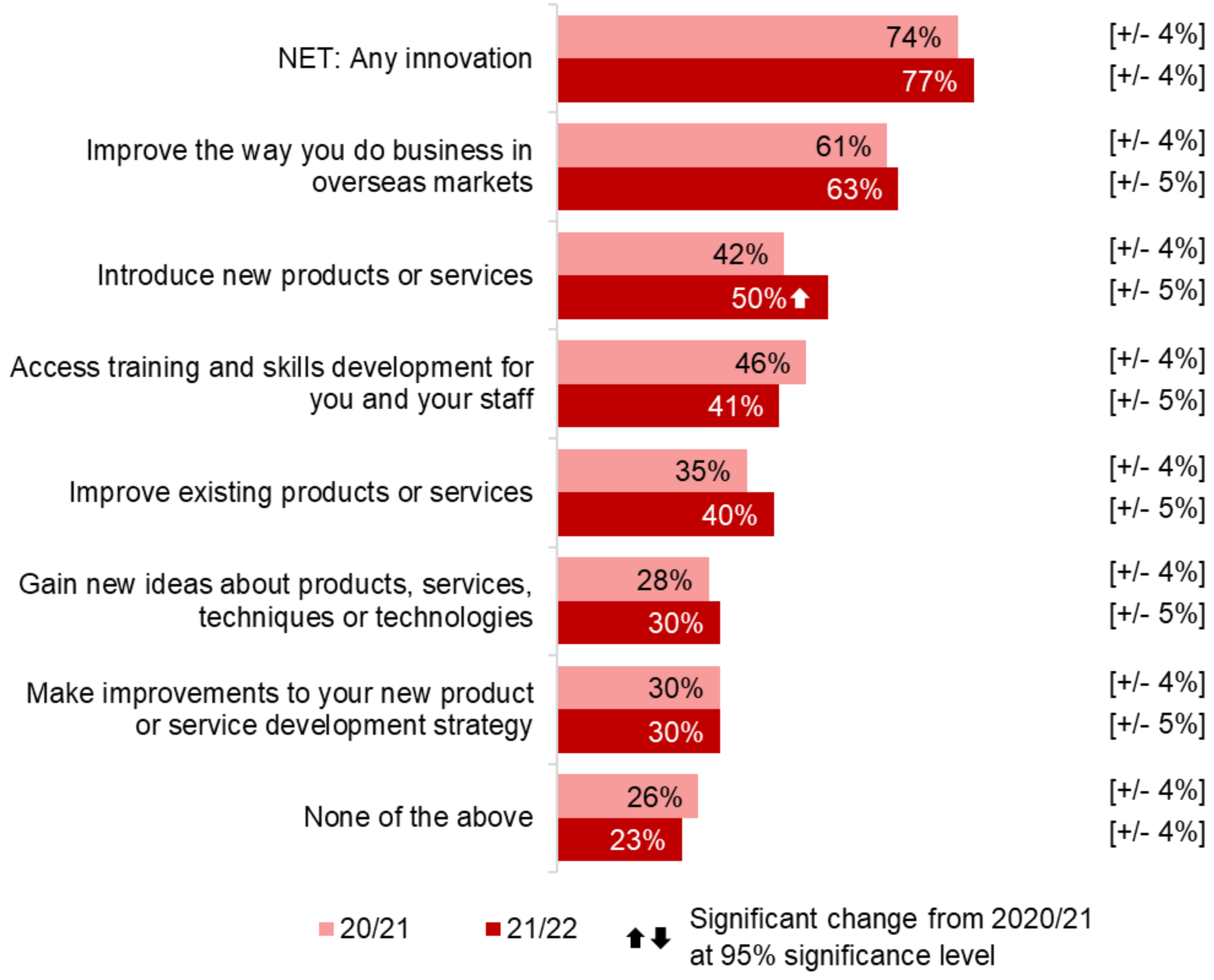


QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year? Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21))

Businesses were asked whether using the ITA service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.1.20). Three quarters (77%) said that using the service helped them with innovation or development in some form. The most frequent responses were: to improve the way they do business overseas (63%), to introduce new products or services (50%) and to access training and skills for themselves or their staff (41%).

Compared to the RIS 2020/21, more businesses said that the service helped them to introduce new products or services (50%, from 42% the previous year).

Chart 4.1.20 Whether the service has / is likely to help innovation and development – ITAs



QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation?
Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21))

International contacts

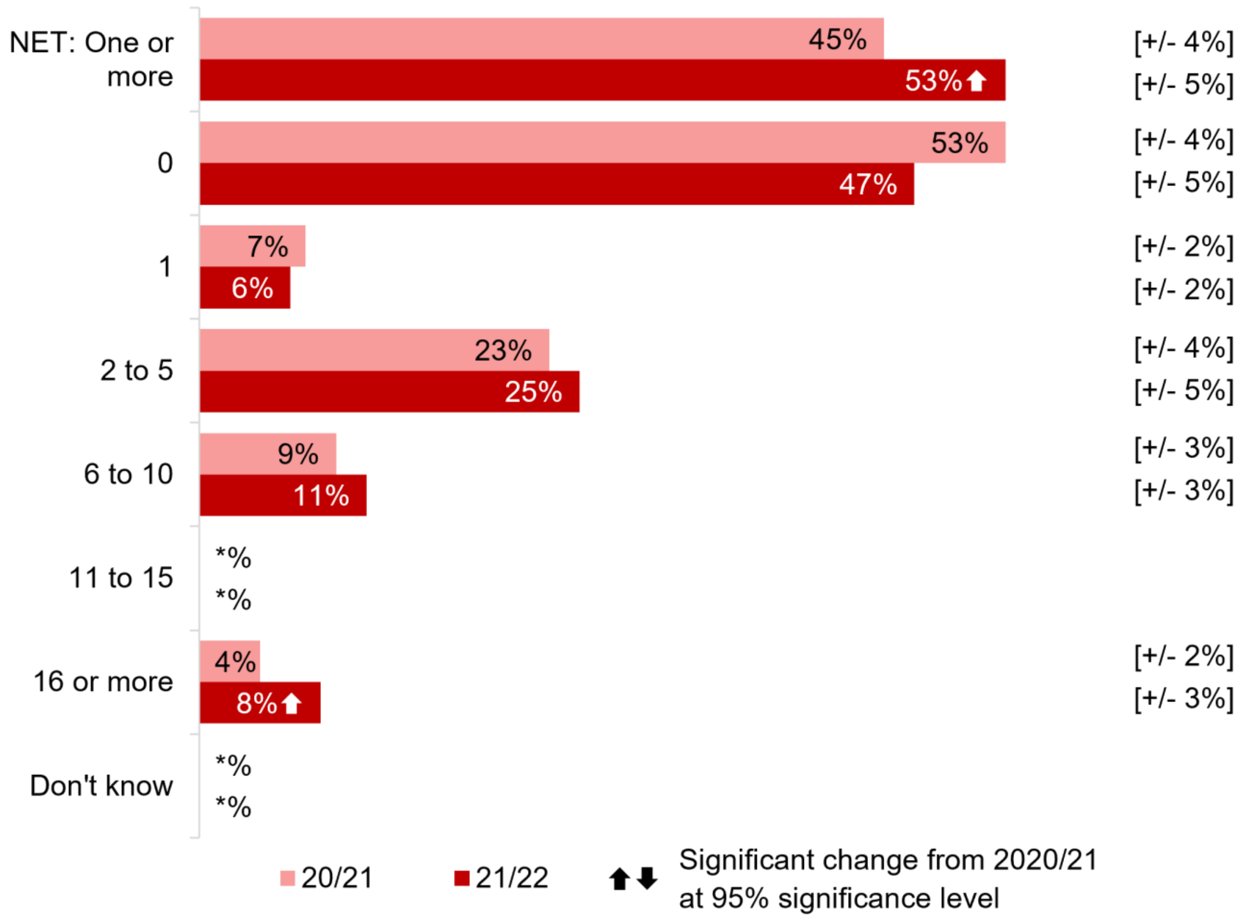
Businesses were asked how many overseas contacts they had made as a result of using ITAs over the past year (Chart 4.1.21). Over half (53%) of businesses made at least one new overseas contact in the year since using the ITA service. This was an increase from the previous year (45% in RIS 2020/21).

A quarter (25%) made between two and five new contacts. Around half (47%) of businesses reported that they had not made any new contacts as a result of using the ITA service. These findings were in line with RIS 2020/21.

More businesses this year reported making a substantial amount of new contacts as result of using ITAs over the past year compared to RIS 2020/21, with 8% of businesses making 16 or more new contacts, compared to 4% the previous year.

The average number of contacts made was three, which was an increase from the RIS 2020/21 average of two.

Chart 4.1.21 Number of new overseas contacts made in previous 12 months – ITAs



QContactsMade: How many new overseas contacts, if any, did your business make as a result of the service in the past year?
*Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21)) *Redacted*

Businesses were asked about the impact they had seen or expected to see as a direct result of using the ITA service (Chart 4.1.22). Two fifths of businesses said they thought using the ITA service had, or would, improve job satisfaction among existing UK employees (43%), safeguard jobs in the UK (42%), or increase export sales per employee (42%).

Businesses with an annual turnover of over £500,000 were more likely than those with turnover below £500,000 to have seen, or have expected to see:

- safeguarded jobs in the UK (55% versus 33%)
- increased export sales per employee (50% versus 35%)
- increased wages to existing UK employees (42% versus 22%)
- an increased number of people employed in the UK (33% versus 17%)

In comparison to RIS 2020/21, the proportion of businesses that had seen, or expected to see, any change increased (from 53% in 2019/20 to 61%). In addition, multiple other changes increased compared to the previous year: improving job satisfaction of existing UK employees (43%, up from 33% in RIS 2020/21), increasing export sales per employee (42%, up from 32%) and increasing wages to existing UK employees (31%, up from 22%). Fewer businesses had seen, or expected to see, no changes (38%, down from 47%).

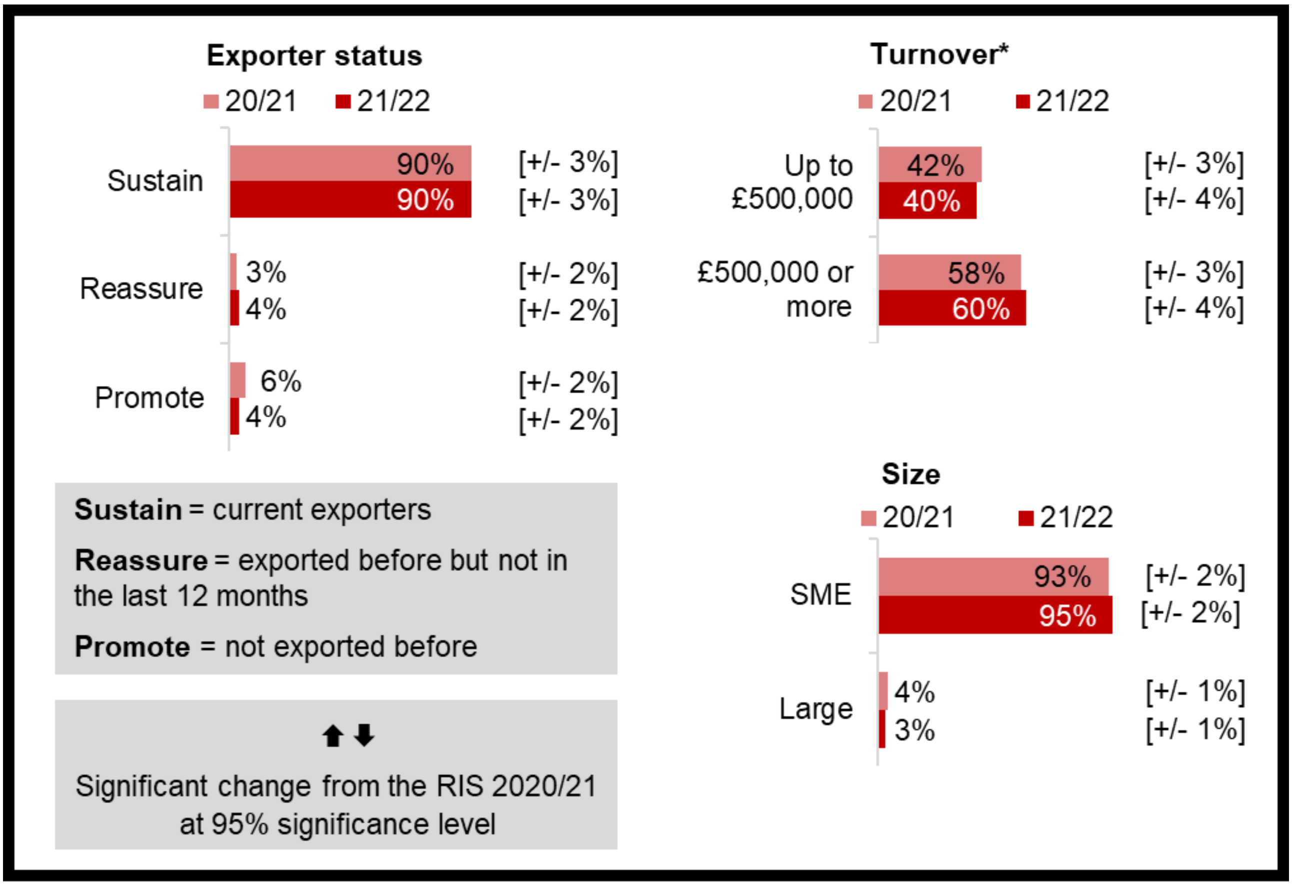
Chart 4.1.22 Changes expected / seen in the UK business as a result of receiving the service – ITAs

QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?
Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21))

4.1.10 Profile of respondents

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), nine in ten (90%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months (Chart 4.1.23). The turnover and size profiles of the businesses supported by ITAs in the survey remained in line with the previous year.[16]

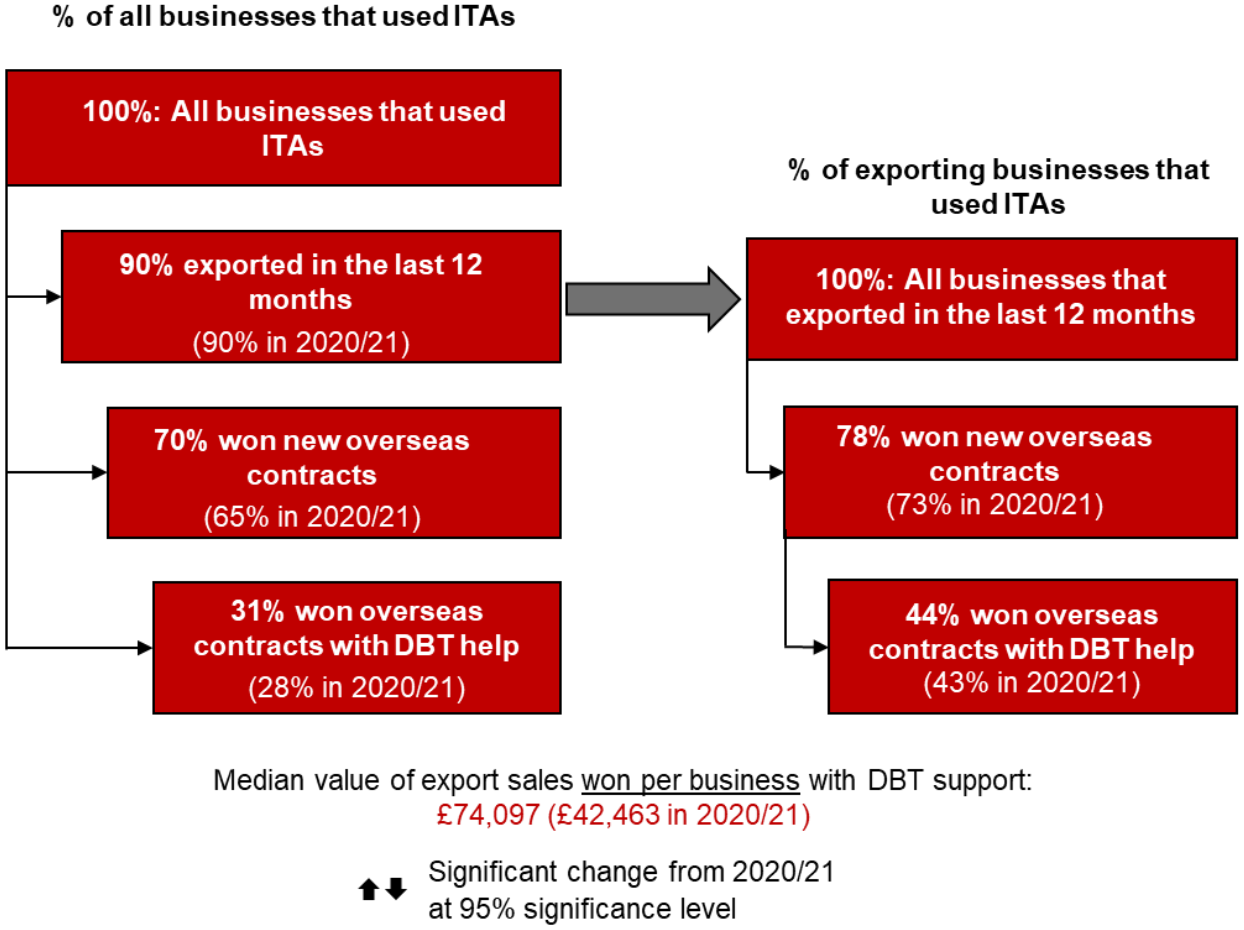
Chart 4.1.23 Profile of RIS Respondents – ITAs



*Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21)); *All businesses that used ITAs not including 'Don't know' and 'Refused' responses (n=462 (2021/22), n=560 (2020/21))*

[16] There was a higher proportion of 'Don't know' and 'Refused' responses in QS 2020/21 for Turnover. 'Don't know' and 'Refused' responses have therefore been removed from Turnover to maximise comparability.

Chart 4.1.24 Summary of businesses supported by ITAs



Base: All businesses that used ITAs (n=563 (2021/22), n=661 (2020/21)); All businesses that used ITAs and that exported in the last 12 months (n=516 (2021/22), n=590 (2020/21); All businesses that used ITAs and that won at least one overseas business contract in the last 12 months (n=386 (2021/22), n=425 (2020/21); All businesses that used ITAs and that won at least one overseas business contract with the help of DBT (n=166 (2021/22), n=168 (2020/21)

4.2 Posts

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

This chapter explores the impact of using the Posts service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 228 businesses that used Posts between April 2021 and March 2022 and participated in both the Quality Survey (QS) and RIS.

4.2.1 Summary of reported impact as a result of Posts support (from RIS)

Actions taken as a result of using Posts

Following their use of the Posts service, two-thirds of businesses had identified new export opportunities or made new contacts (66%), while almost half had researched the paperwork and regulations needed to export (47%). Among non-exporters, a third of businesses (35%) had assessed their readiness to export after using Posts.

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) in the RIS increased from the QS (85%, up from 75% in the QS 2021/22).

More than four in ten (43%) businesses classified as 'Promote' (i.e. never exported before) in the QS 2021/22 had shifted to 'Sustain' in the RIS 2021/22.

Impact on winning contracts

Of the businesses that exported, eight in ten (80%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Posts service.

Overall, two-thirds (66%) of businesses won a new overseas contract. This included a quarter (25%) who said this was with assistance from Posts or DBT.

Among businesses that reported that DBT support was important in helping them win these contracts, 4% said they would not have been able to do this without DBT, and 8% said it would have been unlikely to be able to do this without DBT. These findings were in line with the previous year.

Impact on exposure and growth

Eight in ten (82%) businesses who won any new overseas business contracts with the help of DBT said Posts assisted with expansion into a new market, and just over half (54%) said Posts assisted with expansion within an existing market.

Among all businesses, a quarter (25%) reported being exposed to or starting to do business in at least one new market. Compared to the previous year, Europe replaced Asia as the most common new market for increased exposure or business, with 60% of those reporting increased exposure in a new market saying this was in Europe. Compared to the previous year, these businesses were also more likely to report increased exposure or new business within the European Union (48%, up from 20% in 2020/21), and less likely to report increased exposure in Asia (33% compared to 55% in 2020/21).

Impact on contacts and networks

Around six in ten businesses (61%) made at least one new overseas contact after using Posts. The mean number of contacts made was four, the same as in 2020/21.

Impact on confidence

A quarter (25%) of businesses reported that using the Posts service boosted their confidence to export in a new market, while 23% said this for increasing exports in an existing market. These findings were in line with the previous year.

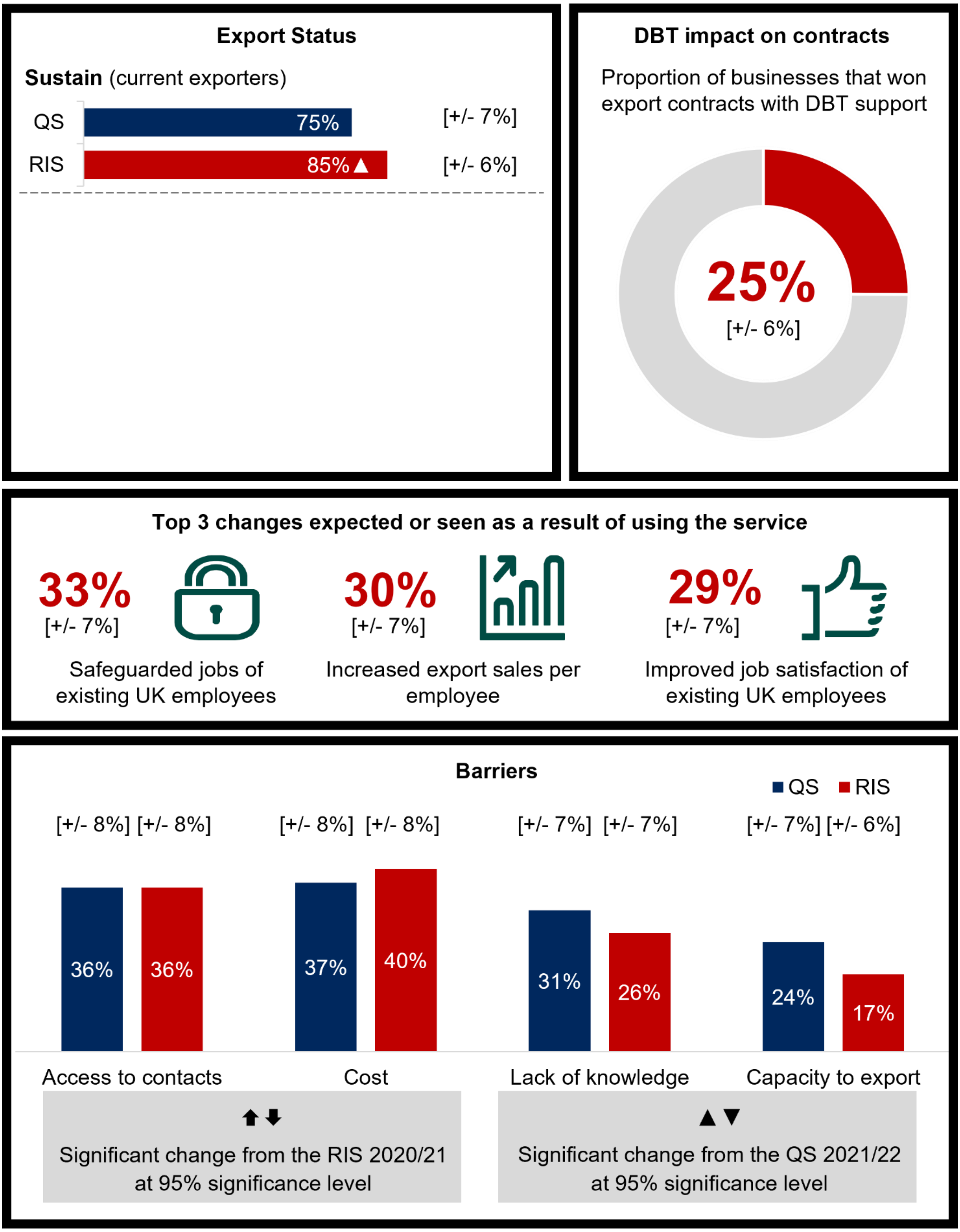
There was an increase in the proportion that said using Posts had improved their knowledge of competitors in overseas markets (17%, up from 7% in 2020/21).

Other impact

Six in ten (60%) businesses reported that the Posts service helped them gain access to information that they would otherwise have been unable to come by, while a slightly smaller proportion (56%) felt it helped them gain access to prospective customers or business partners.

Businesses were less likely to say that using the Posts service had helped them to develop an export business plan (22% compared to 32% in 2020/21).

Chart 4.2.1 Key indicators from the RIS (Posts)



Base: All businesses that used Posts and completed both surveys (n=228); Barriers - Access to contacts (QS n=225, RIS n=224), Cost (QS n=222, RIS n=222), Lack of knowledge (QS n=225, RIS n=226), Capacity to export (QS n=222, RIS n=223)

4.2.2 Satisfaction with Posts (from Quality Survey)

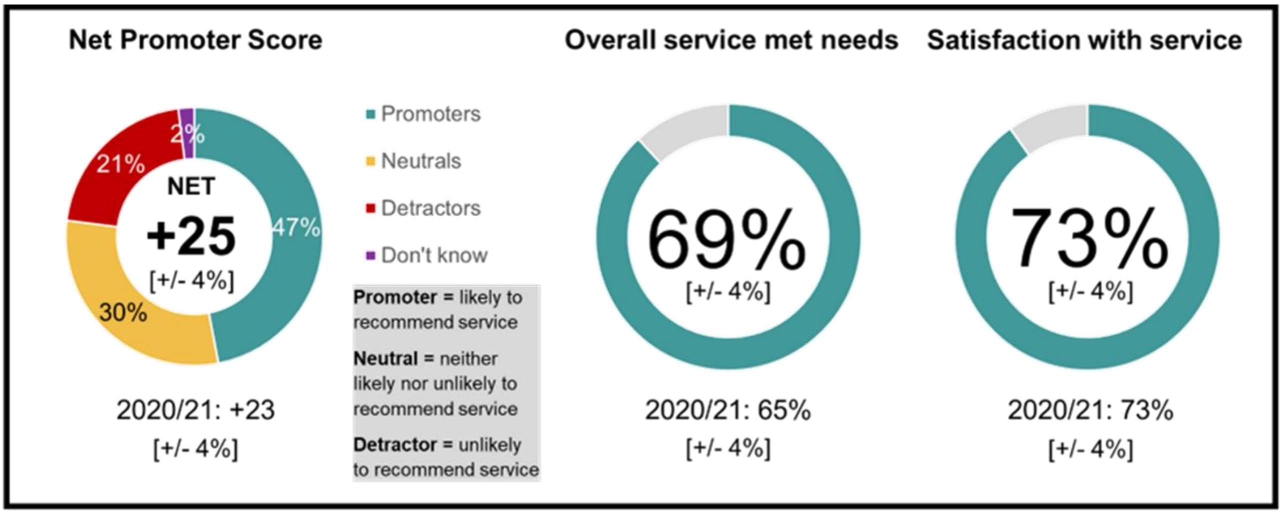
In the QS 2021/22, nearly half of businesses (47%) that used Posts said they would recommend the service, while one in five (21%) said they would not. This gave Posts a Net Promoter Score (NPS) of +25. Three-quarters (73%) reported they were satisfied with the Posts service, and seven in ten (69%) said the overall service met their needs. Satisfaction remained in line with the previous year.

Posts users were particularly positive about staff knowledge (85%). This was followed by the amount of time taken to receive information (75%) and the comprehensiveness of the information they received (73%). This was in line with the previous year.

As a result of using Posts, around half of businesses (46%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all Posts users, almost six in ten (58%, down from 67% in 2020/21) said they had identified new export opportunities or made new contacts, while nearly four in ten said they had researched the paperwork and regulations needed to export - a decrease from the previous year (37% compared to 49% in 2020/21).

Posts respondents were most likely to report that 'cost' was a barrier to exporting (38%), followed by 'access to networks' (36%). This was in line with the previous year.

Chart 4.2.2 Net Promoter Score and Satisfaction with service (from Quality Survey) – Posts

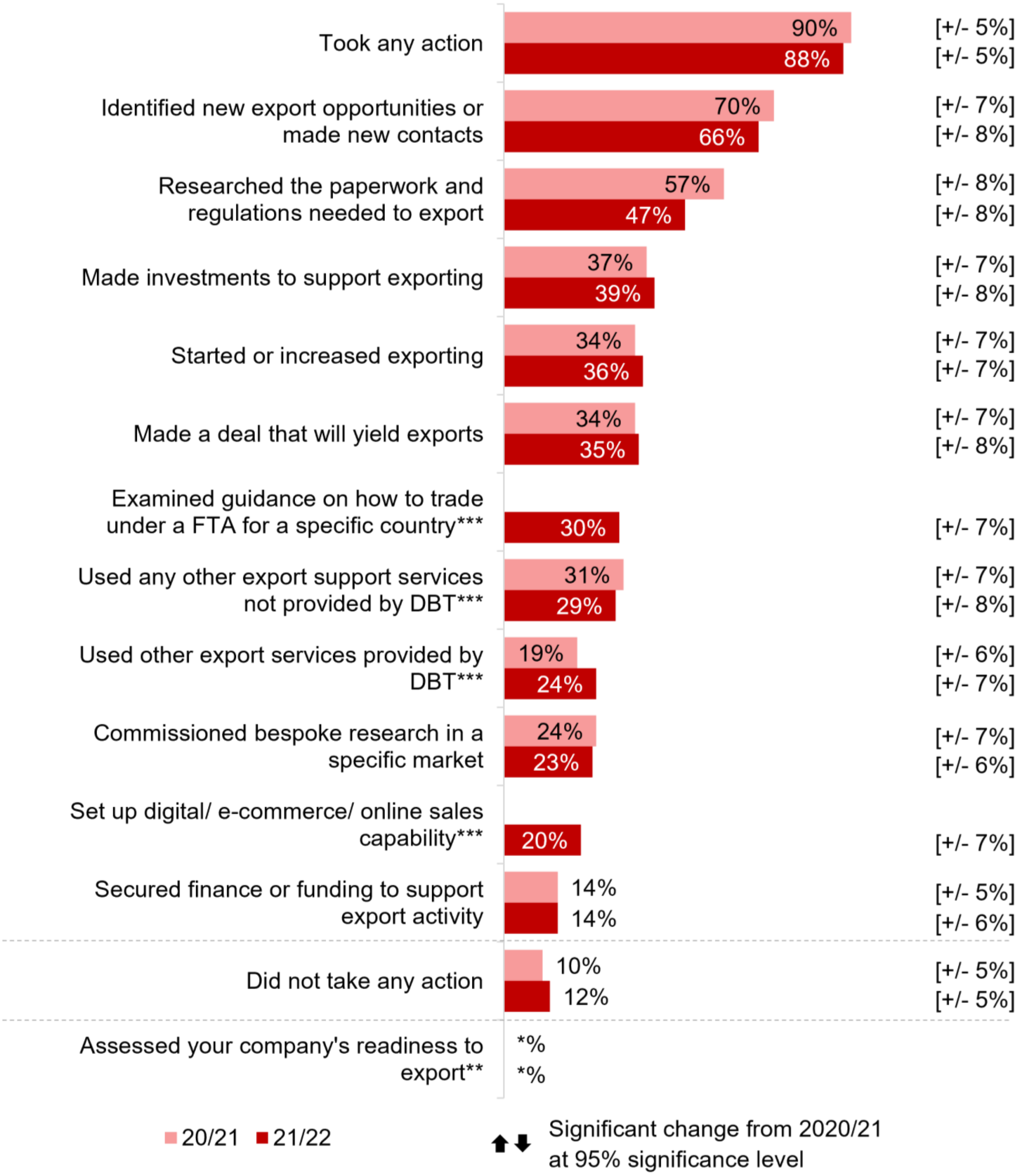


From the Quality Survey 2021-22:
Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Posts (n=685).
Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Posts (excluding 'not applicable' responses) (n=661).
Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Posts (excluding 'not applicable' responses) (n=665).

4.2.3 Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the Posts service (Chart 4.2.3). Nine in ten businesses (88%) reported taking any action. Two-thirds of businesses reported that they had identified new export opportunities or made new contacts (66%), while nearly half had researched the paperwork and regulations needed to export (47%).

Chart 4.2.3 What the business has done as a result of receiving the service – Posts



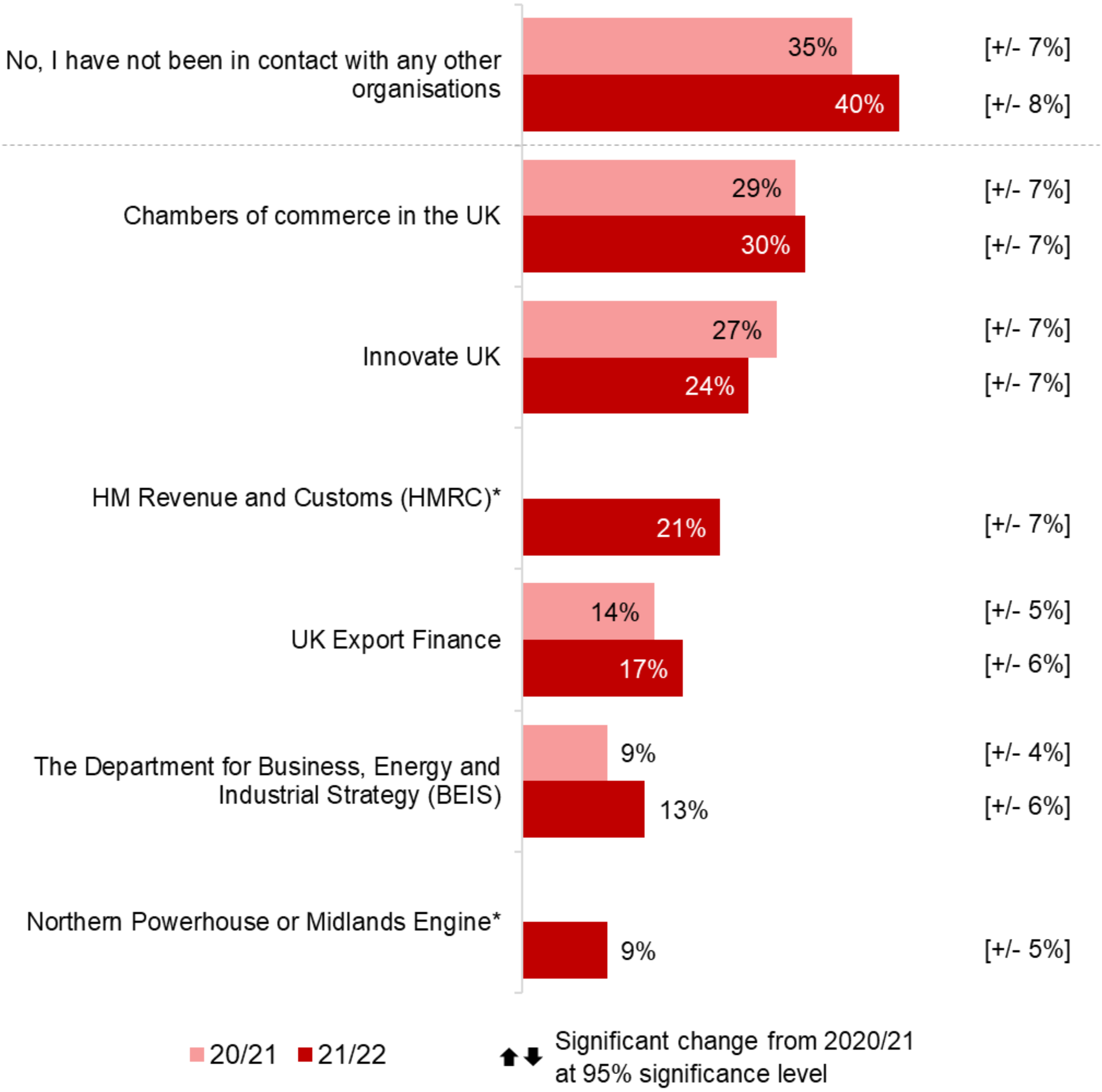
QResultService: What has your business done as a result of the service?
Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21)); All businesses that used Posts and were non-exporters (n= (2021/22), n=* (2020/21)). *** Code amended or added in 2021/22; ** Asked to non-exporters only. *Redacted due to small base size*

Businesses were asked what organisations they had been in contact with since using Posts (Chart 4.2.4). Three in ten had been in contact with the British Chambers of Commerce (30%) and a quarter with Innovate UK (24%). Four in ten (40%) businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Businesses with a turnover of over £500,000 were more likely to have been in contact with the British Chambers of Commerce than businesses with a turnover of less than £500,000 (35% and 13% respectively).

In addition to the organisations shown in Chart 4.2.4, businesses were asked whether they had been in contact with any other organisations or sources of information (not shown in the chart). In comparison to the RIS 2020/21, businesses were less likely to have been in contact with business, professional or trade bodies (4%, down from 14% in 2020/21), have been online or on Google (4%, down from 16%), in contact with friends/colleagues (4%, down from 14%), private consultants or advisors (4%, down from 9%) or Local Enterprise Partnerships (1%, down from 7%). These codes were unprompted.

Chart 4.2.4 What organisations respondents have been in contact with since receiving the service – Posts



QAnyContact: Since your business used the service 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 businesses that used Posts (n=228 (2021/22), n=234 (2020/21)). Coded responses with 5% or more in 2021/22 are included. * Code amended or added in 2021/22*

4.2.4 Reported impact on exporting

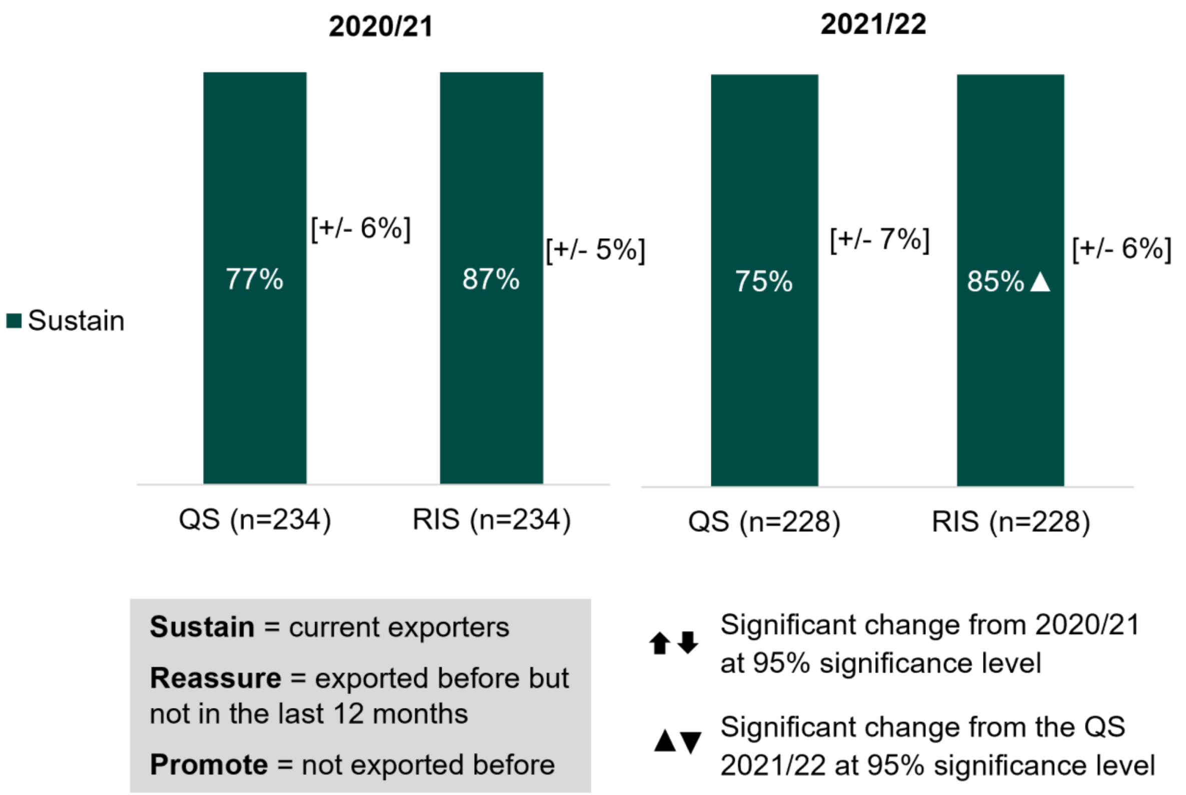
Businesses that used Posts were asked about their export status, both at the time they accessed the Posts service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DBT 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. Three-quarters of businesses (75%) that used Posts fell into this segment at the time of the service delivery (QS 2021/22). This increased to 85% in the RIS 12 months later.

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

- **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.

Chart 4.2.5 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Posts



Source: Composite measure merging data from several variables.
Base: All businesses that used Posts and completed both surveys (Quality Survey: n=228 (2021/22), n=234 (2020/21); RIS: n=228 (2021/22), n=234 (2020/21))

The export status of some businesses changed between the time of the service delivery and 12 months later in the RIS (see Table 4.2.1).

Table 4.2.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Posts

Quality Survey Export status	RIS Export status	Percentage	Change since 2020/21
Sustain (n=179)	Sustain	**99%** [+/- 2%]	-
	Reassure	**c**	-
	Promote	**c**	-
Reassure (n=c)	Sustain	**c**	-
	Reassure	**c**	-
	Promote	**c**	-
Promote (n=c)	Sustain	**c**	-
	Reassure	**c**	-
	Promote	**c**	-

c Cells have been suppressed to protect confidentiality

*Source: Composite measure merging data from several variables. Some movements are not logically possible and may represent respondent error. Data only includes respondents that provided details of their export status in both surveys. *Small base size*

Considering businesses that were in the Sustain segment at the time of the Quality Survey (179 businesses), 99% continued in Sustain.

4.2.5 Reported exported contracts achieved since receiving the service

Businesses that had exported in the previous 12 months were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the Posts service (Chart 4.2.6). Businesses were asked to think about all contracts, not just those assisted by Posts or DBT.

Of the 85% of businesses that had exported, 80% reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service. This was in line with the RIS 2020/21 (82%).

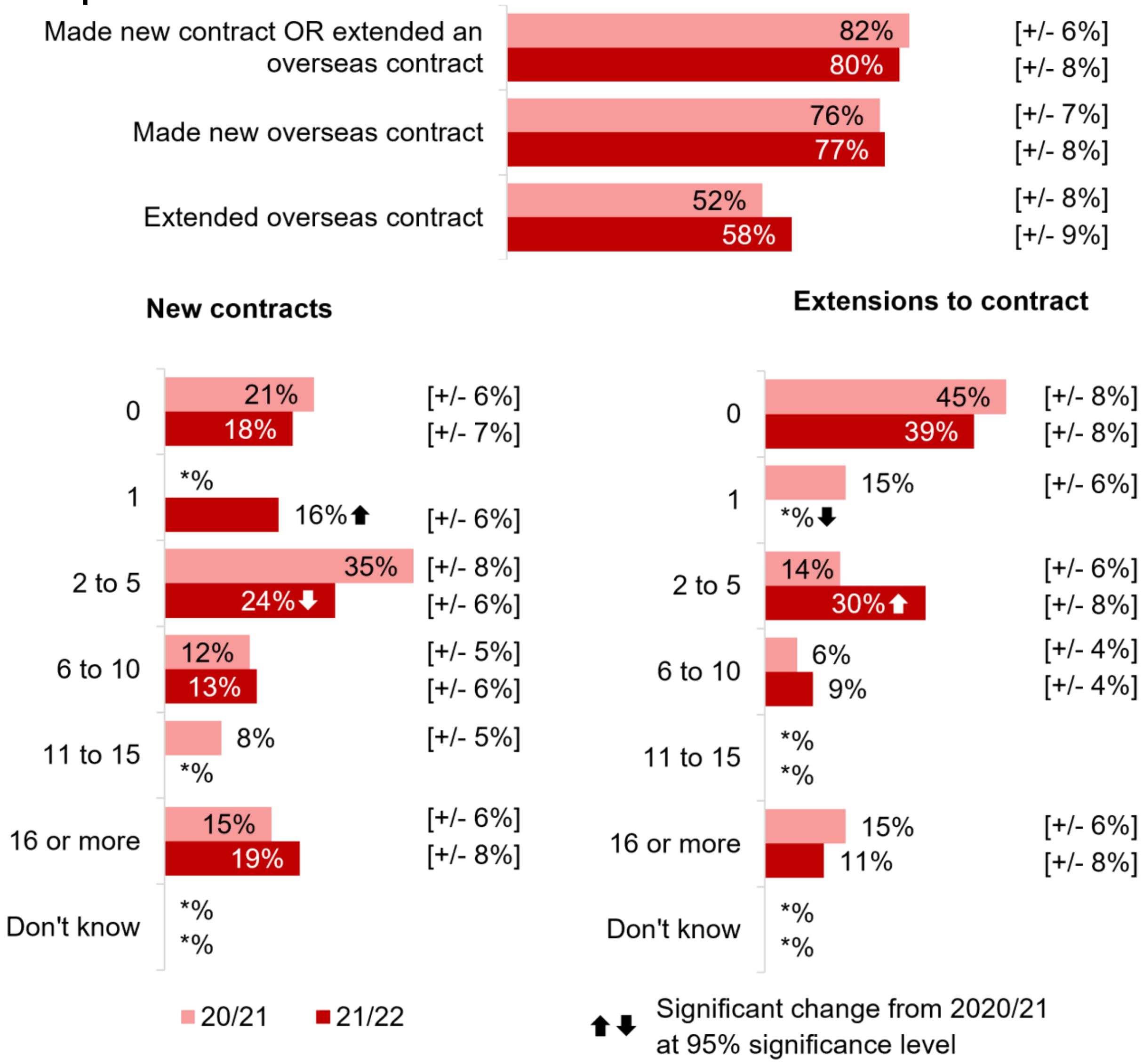
Around three-quarters (77%) of these exporting businesses had won new overseas business contracts in the year since they used the service. Specifically, 16% had won one overseas contract, and a quarter (24%) had won between two and five overseas contracts. Two in ten (19%) businesses had won 16 or more overseas contracts. The median number of contracts won among exporting businesses that had used Posts was two, which was in line with the previous year.

Compared to RIS 2020/21, a larger proportion of businesses reported winning one new contract (16%, up on 2020/21). However, a smaller proportion of businesses reported winning between two and five overseas contracts (24%, down from 35% in 2020/21). The overall volume of new contracts has not changed significantly.

Around six in ten (58%) exporting businesses that used Posts reported that they had gained extensions to existing overseas business contracts in the year since they used the service, with three in ten (30%) extending between two and five contracts. Around one in ten (11%) extended more than 16 existing overseas sales contracts. Almost four in ten (39%) businesses had not extended any existing contracts. The median number of contracts extended (including those that did not extend any) was one.

Compared to RIS 2020/21, a smaller proportion of businesses reported extending one contract (down from 15% in 2020/21). However, a larger proportion of businesses reported extending between two and five contracts (30%, up from 14% in 2020/21).

Chart 4.2.6 Proportion of businesses that exported and reported they had made new overseas contracts and / or extended existing contracts, and number of contracts made in previous 12 months – Posts



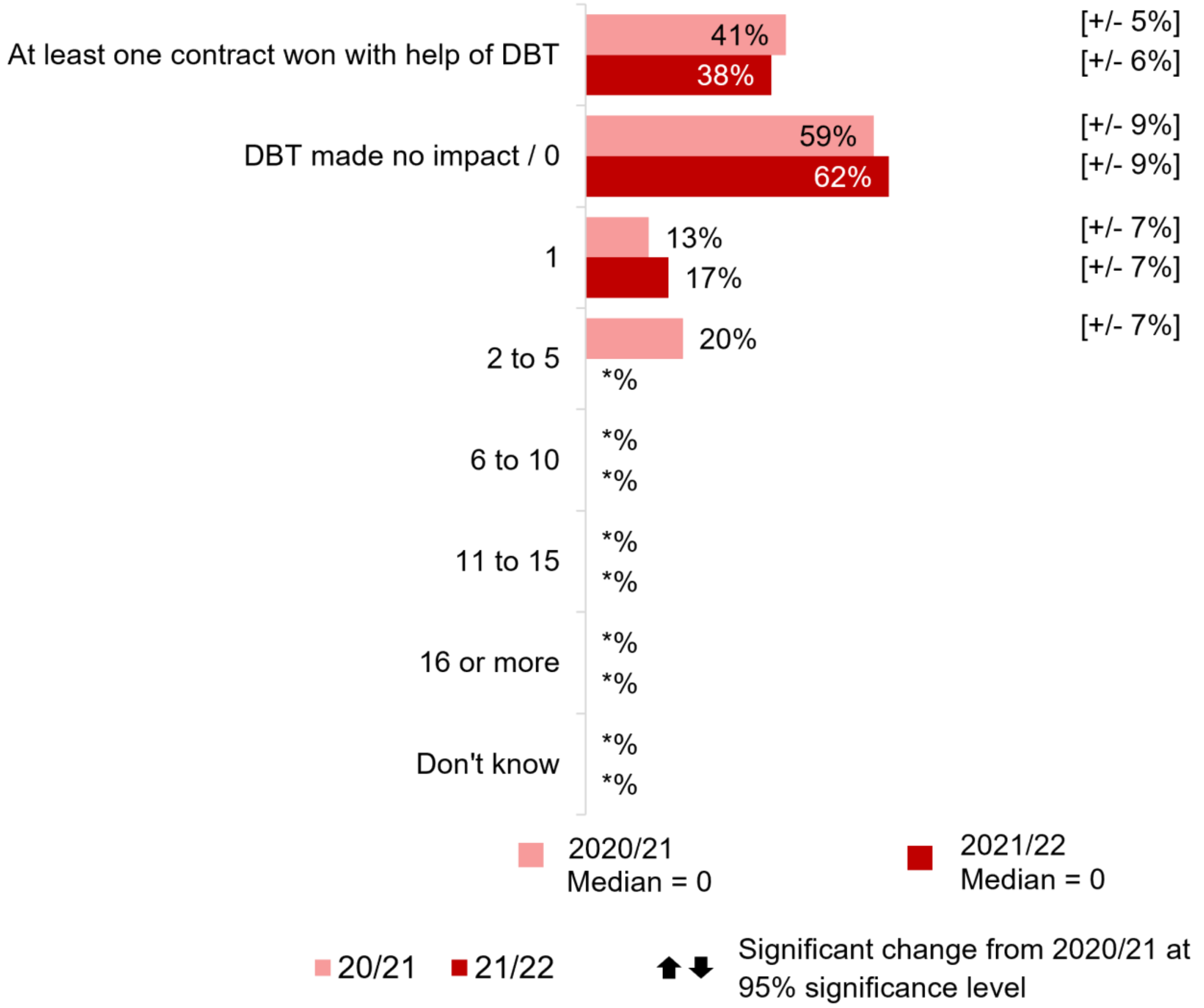
QNewcontract: How many new overseas business contracts for export sales did you win in the past year?
QExtendcontract: How many extensions to existing overseas business contracts for export sales did you win in the past year?
*Base: All businesses that used Posts and were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=198 (2021/22), n=203 (2020/21)); All businesses that used Posts and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=193 (2021/22), n=202 (2020/21)) *Redacted*

Reported additional contracts which were gained because of DBT support

Businesses that exported and had won at least one new contract in the 12 months since the delivery of the Posts service were asked whether they could estimate the number of contracts won with the assistance of Posts or DBT. In total, 158 businesses (that is 69% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.2.7 below, six in ten of these businesses (62%) said they won no new overseas sales contracts with the help of DBT or using DBT services made no impact. One in six (17%) had won one new overseas contract with the help of DBT. The median number of contracts that DBT helped win was zero, for current exporters that used Posts. These findings were in line with the previous year.

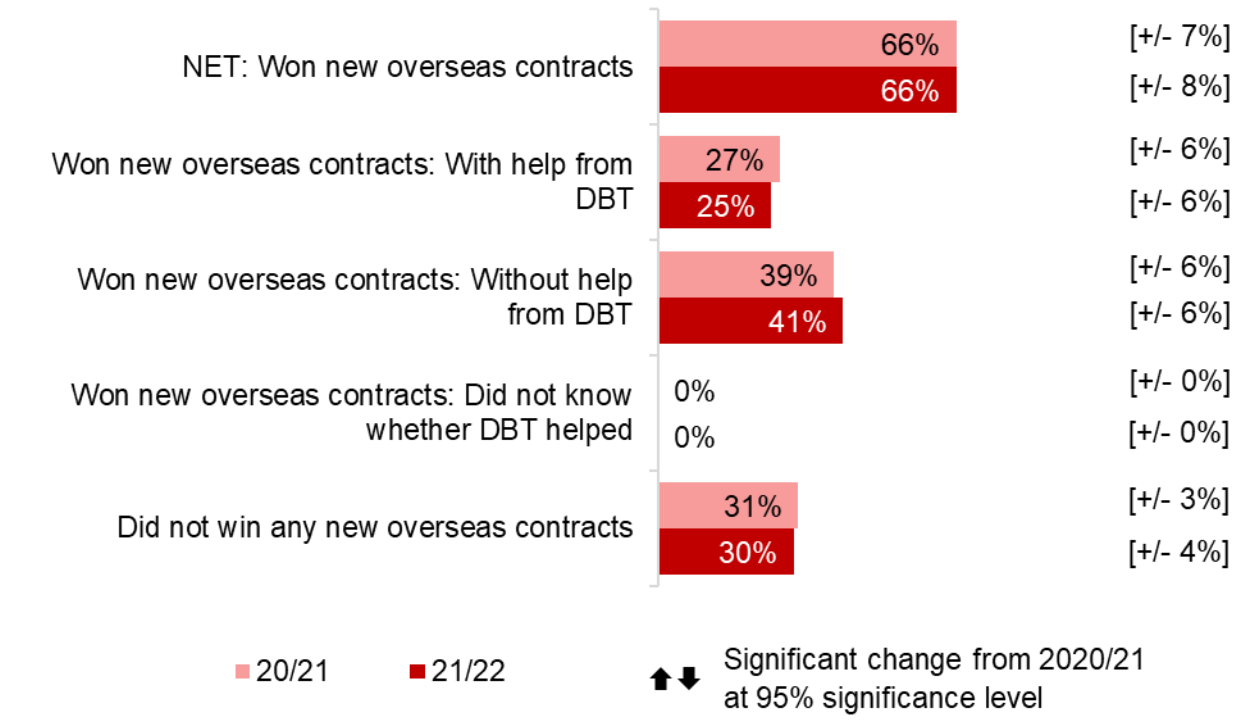
Chart 4.2.7 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – Posts



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 DBT?
QContractNumber: How many new overseas contracts were won with help from DBT?
*Base: All businesses that used Posts and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=158 (2021/22), n=151 (2020/21)). Median values include zero. *Redacted*

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.2.8). Among all businesses that had used Posts, 66% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, we estimate that 25% of Posts respondents had won contracts with help from DBT, while 41% of Posts respondents said they had won contracts without help from DBT. These findings were in line with the previous year.

Chart 4.2.8 Proportion of businesses reported to have won or not won new overseas contracts, and the proportion of businesses estimated to have won new overseas contracts with or without DBT support – Posts



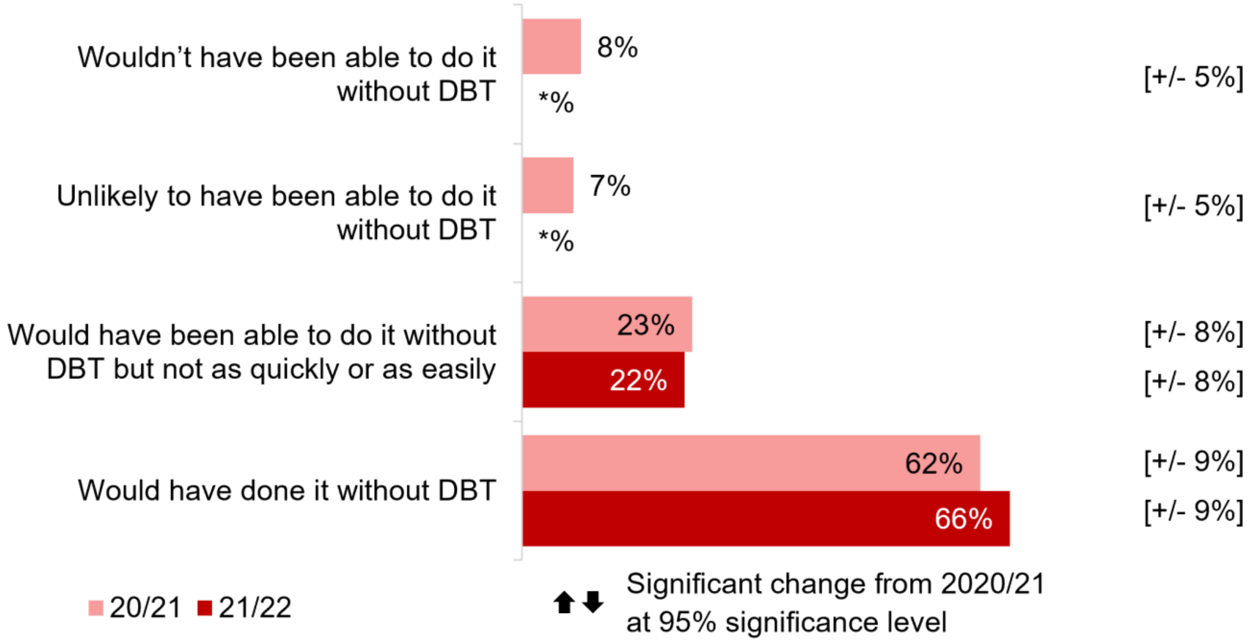
Source: Composite measure merging data from several variables.
Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21))

Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT's support in winning overseas contracts. This question was asked to businesses that reported they had won at least one overseas business contract with the help of DBT in the last 12 months, since the delivery of the Posts service. Exporting businesses that said that DBT made no impact or did not help them win any new contracts were not asked this question. However, they have been included under 'would have done it without DBT' to better understand the level of support that the Posts service provided.

Around a third of these businesses (34%) reported that DBT support was important in helping them win these contracts to some extent. Two in ten (22%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.2.9). The remaining 66% thought they would have been able to achieve the same outcome without DBT support. These results are in line with the previous year.

Chart 4.2.9 How important DBT's help was in winning overseas contracts – Posts



QContractHelp: How important was DBT's help in winning these overseas contracts?
Base: All businesses that used Posts and won any new overseas contracts in the past year (n=158 (2021/22), n=151 (2020/21))
**Redacted*

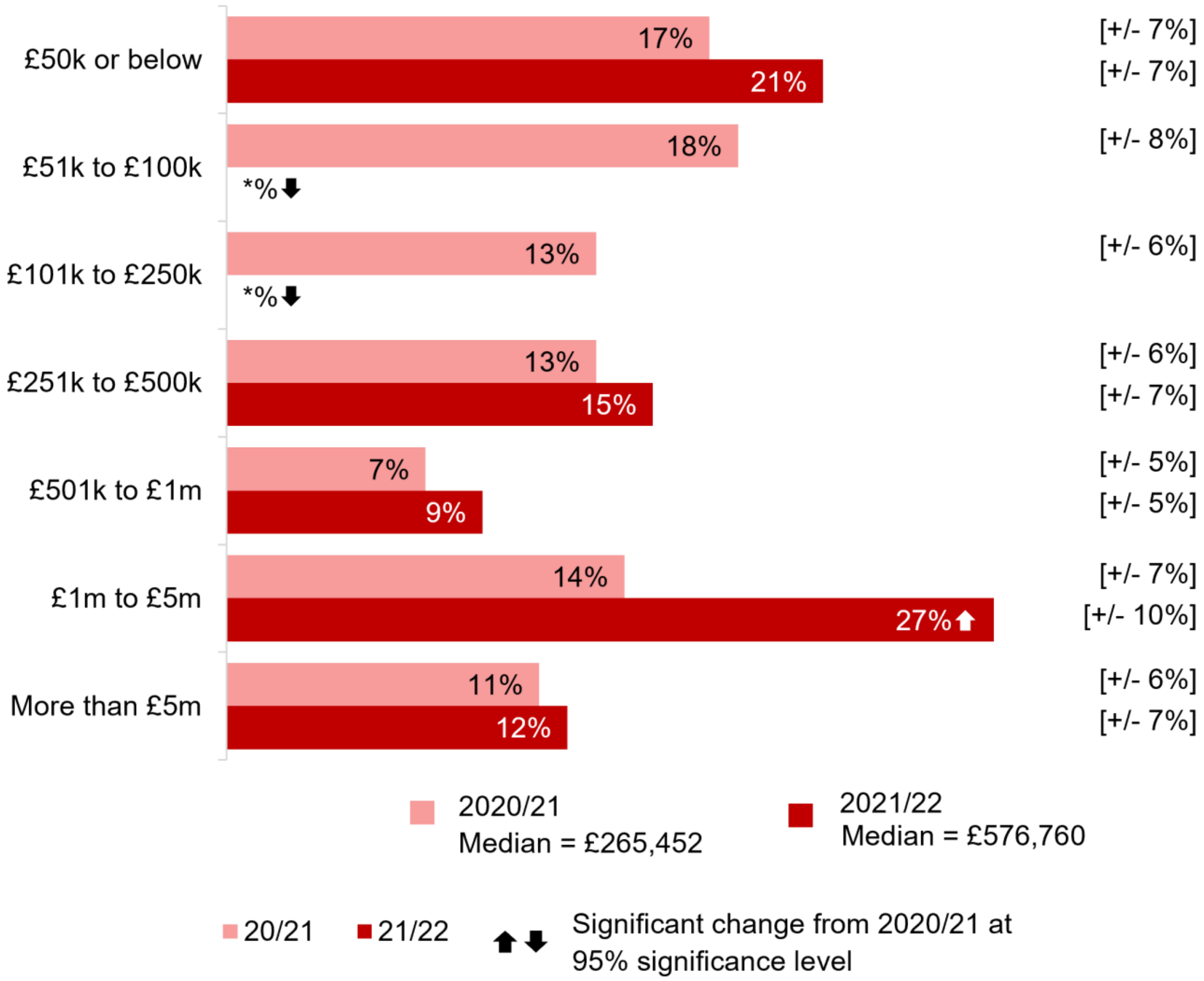
4.2.6 Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 66% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts in total (Chart 4.2.10). The median value of the export sales of all new overseas contracts for these businesses was £576,760 (compared to £265,452 in RIS 2020/21).[17] One in five (21%) had won contracts with an export sales value of £50,000 or below. However, more than a quarter (27%) had won contracts with an export sales value between £1 million to £5 million (up from 14% in 2020/21).

[17] Values are not adjusted for inflation when comparing to 2020/21.

Chart 4.2.10 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 businesses that used Posts and won any new overseas business contracts (n=158 (2021/22), n=151 (2020/21))
**Redatced*

Reported additional value of DBT support

This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the Posts service, they were asked to think about the impact from all of their interactions with DBT. The analysis in this section measures the additional contribution that DBT made towards businesses outcomes, including the number and value of new overseas contracts made.

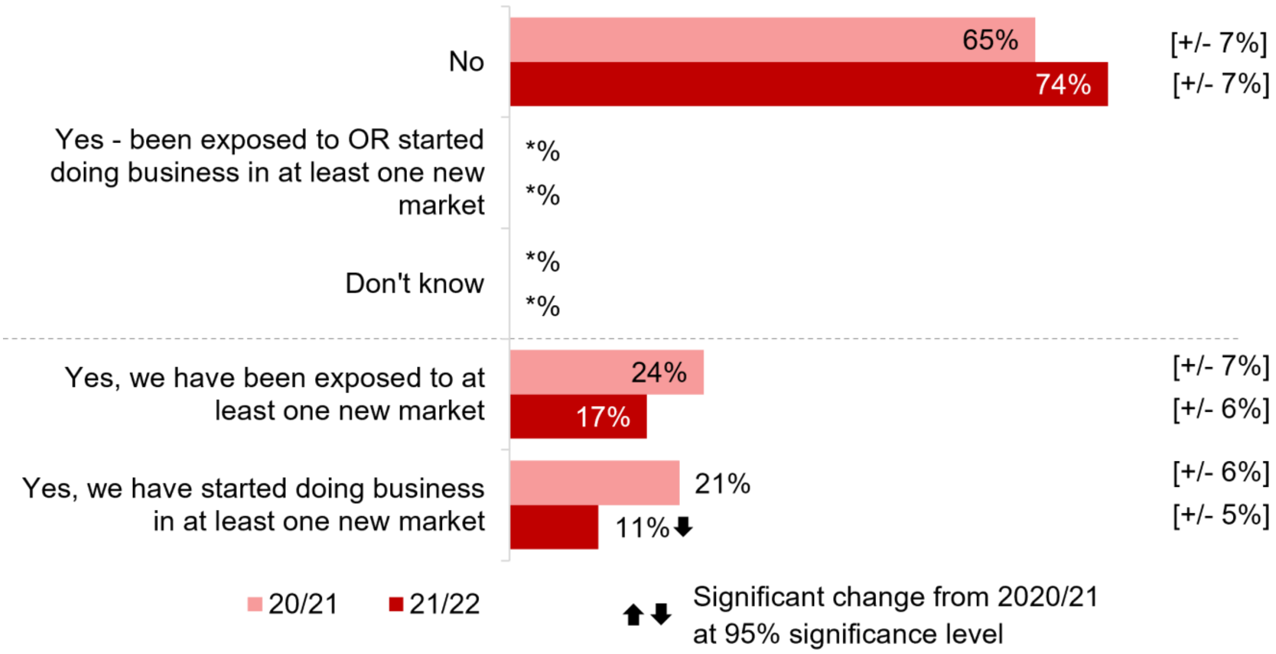
4.2.7 Recorded exposure and growth within new markets

All businesses that used Posts were asked whether they had increased their exposure or started doing business in any new markets because of using the Posts service (Chart

4.2.11). Compared to the previous year, similar proportions of businesses said they had been exposed to at least one new market (17% compared to 24% in 2020/21).

Compared to the previous year, fewer businesses reported that they had started doing business in at least one new market (11% compared to 21% in 2020/21).

Chart 4.2.11 Whether increased exposure or starting business in a new overseas market – Posts



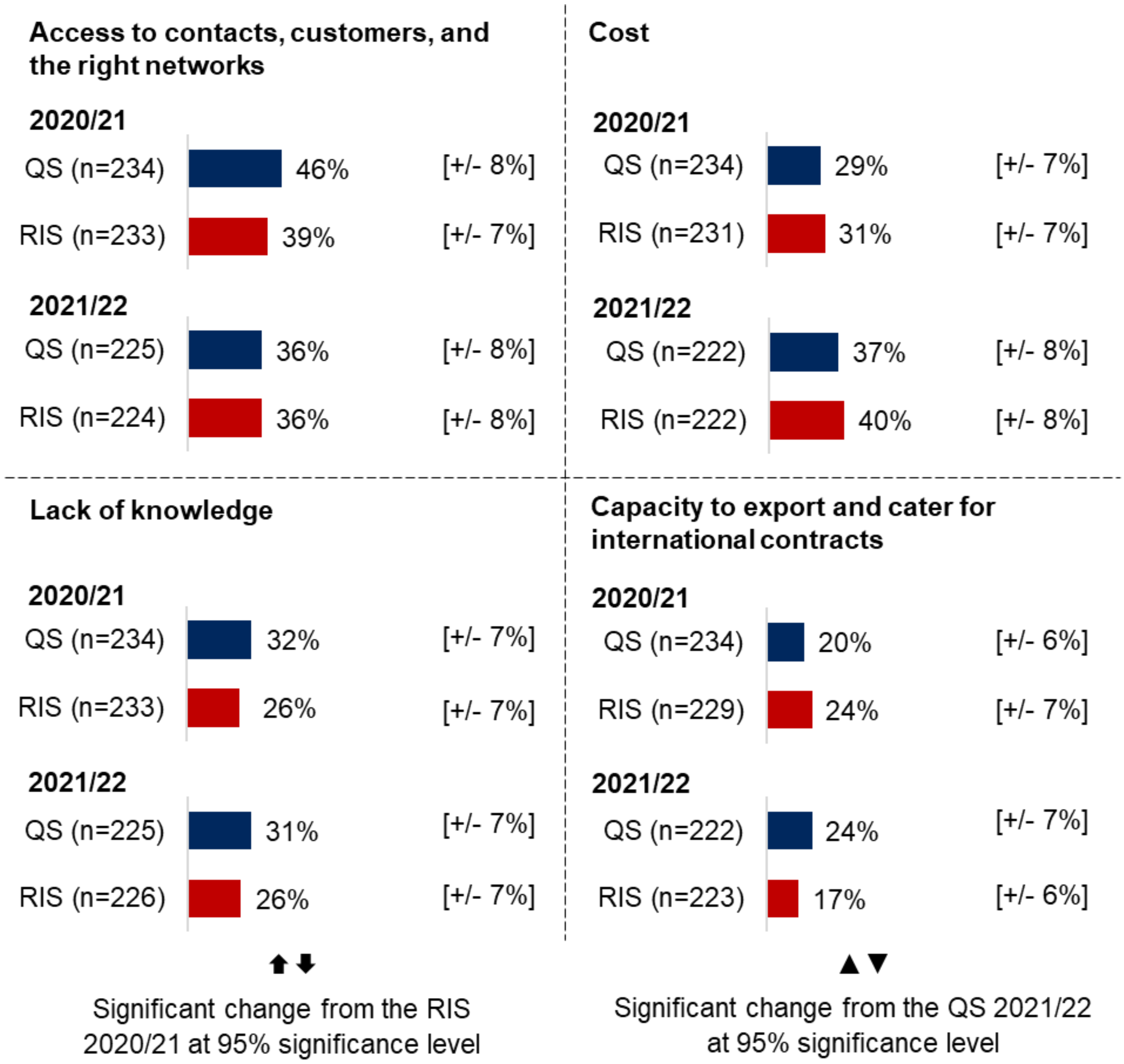
QGrowthDIT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
*Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21)) *Redacted*

4.2.8 Barriers to exporting

Businesses were asked in both the QS and RIS about four **potential barriers for their business in relation to exporting** (Chart 4.2.12); 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).

The top barrier in RIS 2021/22 was 'cost' (40%) followed by 'access to contacts' (36%). 'Lack of knowledge' was seen as a barrier by around one in four businesses (26%) whilst 'capacity to export' was seen as a barrier by one in five businesses (17%). These results were in line with the previous year and with responses in the QS 2021/22.

Chart 4.2.12 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Posts



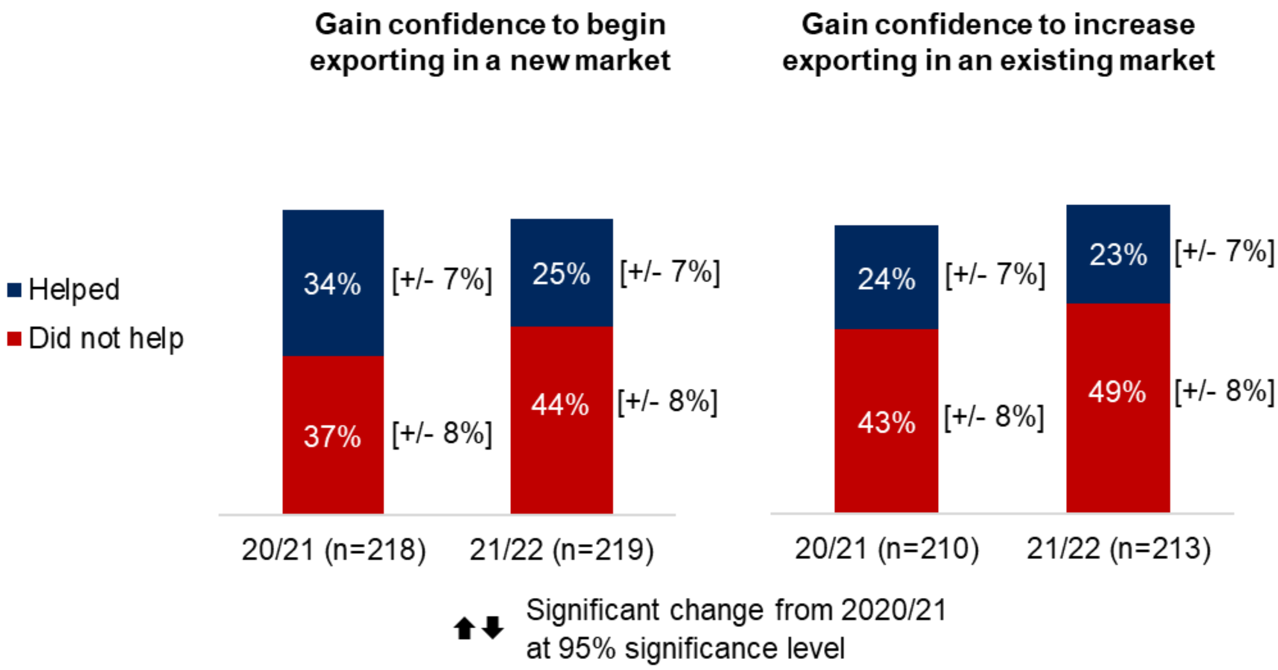
QBarrier: On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier was the following for your business when it comes to exporting? A barrier is defined as a score between 7 and 10.
Base: All businesses that used Posts not including those who gave a 'not applicable' answer.

4.2.9 Wider benefits of the service

Businesses were asked to think about the extent to which using the Posts service had given them confidence to begin exporting in a new market or increase exporting in an existing market (Chart 4.2.13). A quarter (25%) of businesses reported that using the Posts service had given them confidence to begin exporting in a new market, while more than four in ten (44%) said the service had not helped them in this way. A quarter (23%) reported that using the Posts service had given them confidence to begin exporting in an existing market, but a larger proportion (49%) said the service did not help them to do this.

These results are in line with the previous year.

Chart 4.2.13 To what extent using the Posts service helped to build confidence to export



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 the service help you to …? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used Posts not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

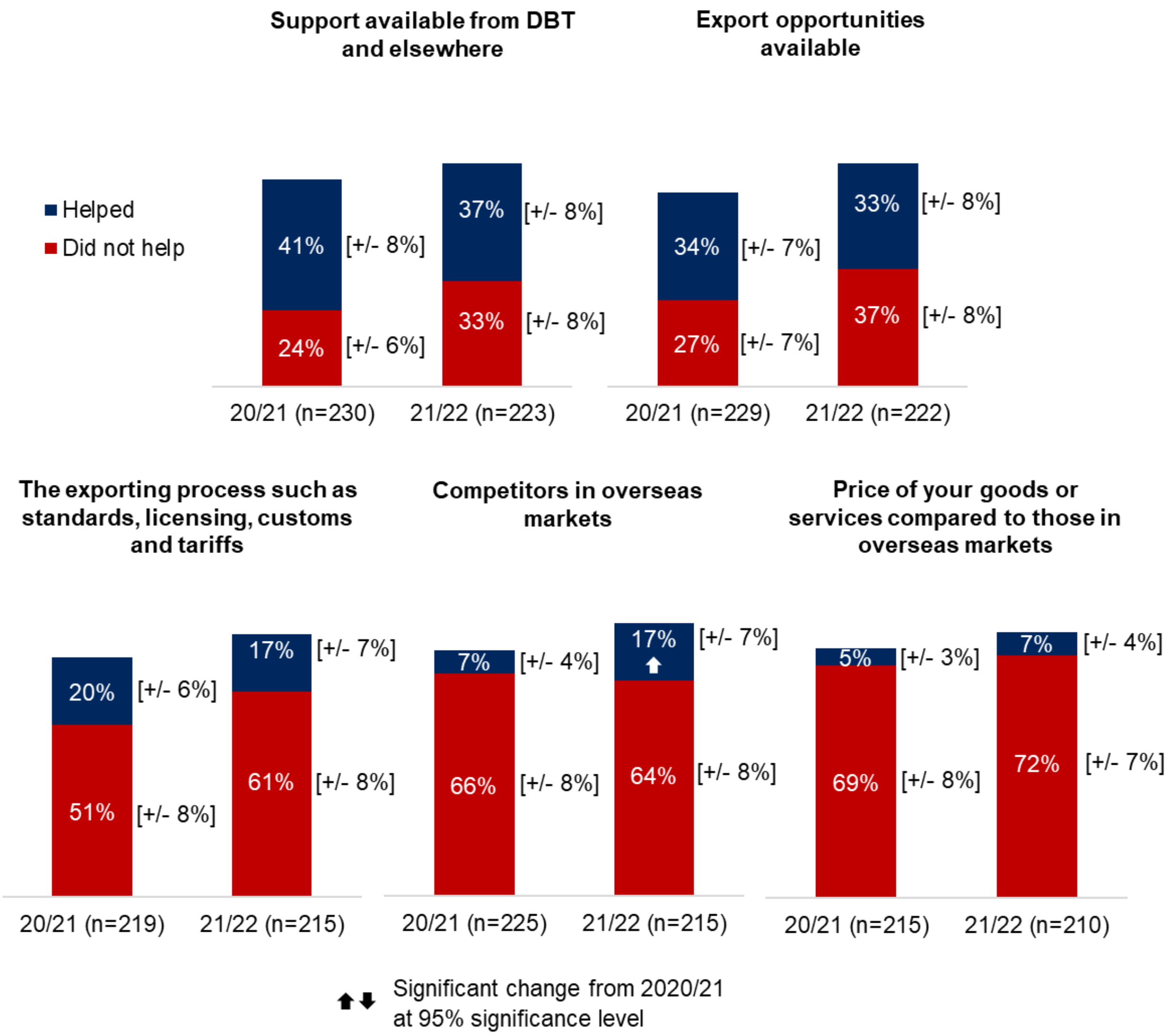
Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**. Chart 4.2.14 below shows how businesses rated the impact of using the Posts service on their knowledge.

On balance, more businesses reported that using the Posts service **was helpful for increasing their knowledge of support available to them (from DBT and elsewhere)**. However, this was not the case for **increasing their knowledge of export opportunities available.** Nearly four in ten (37%) said the service helped to increase their knowledge of support available to them, while a third (33%) said it did not help them do this. A third (33%) reported that using the Posts service was helpful for increasing their knowledge of export opportunities available, with 37% saying the service did not help them to do this.

However, six in ten (61%) businesses said that the service **did not help to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs, while 17% of businesses said the service did help them in this way. Businesses with a turnover more than £500,000 were more likely to say that the Posts service had helped to improve their knowledge of the exporting process (16%), compared with businesses with a turnover up to £500,000 (1%).

Only small proportions said that using Posts improved their **knowledge of the price of goods** compared with those in overseas markets (7%). Nearly one in five (17%) said that Posts improved their knowledge about their **competitors in overseas markets**, an increase from the previous year (7%). Otherwise, findings were in line with RIS 2020/21.

Chart 4.2.14 To what extent the business felt that their knowledge has improved as a result of using the service – Posts



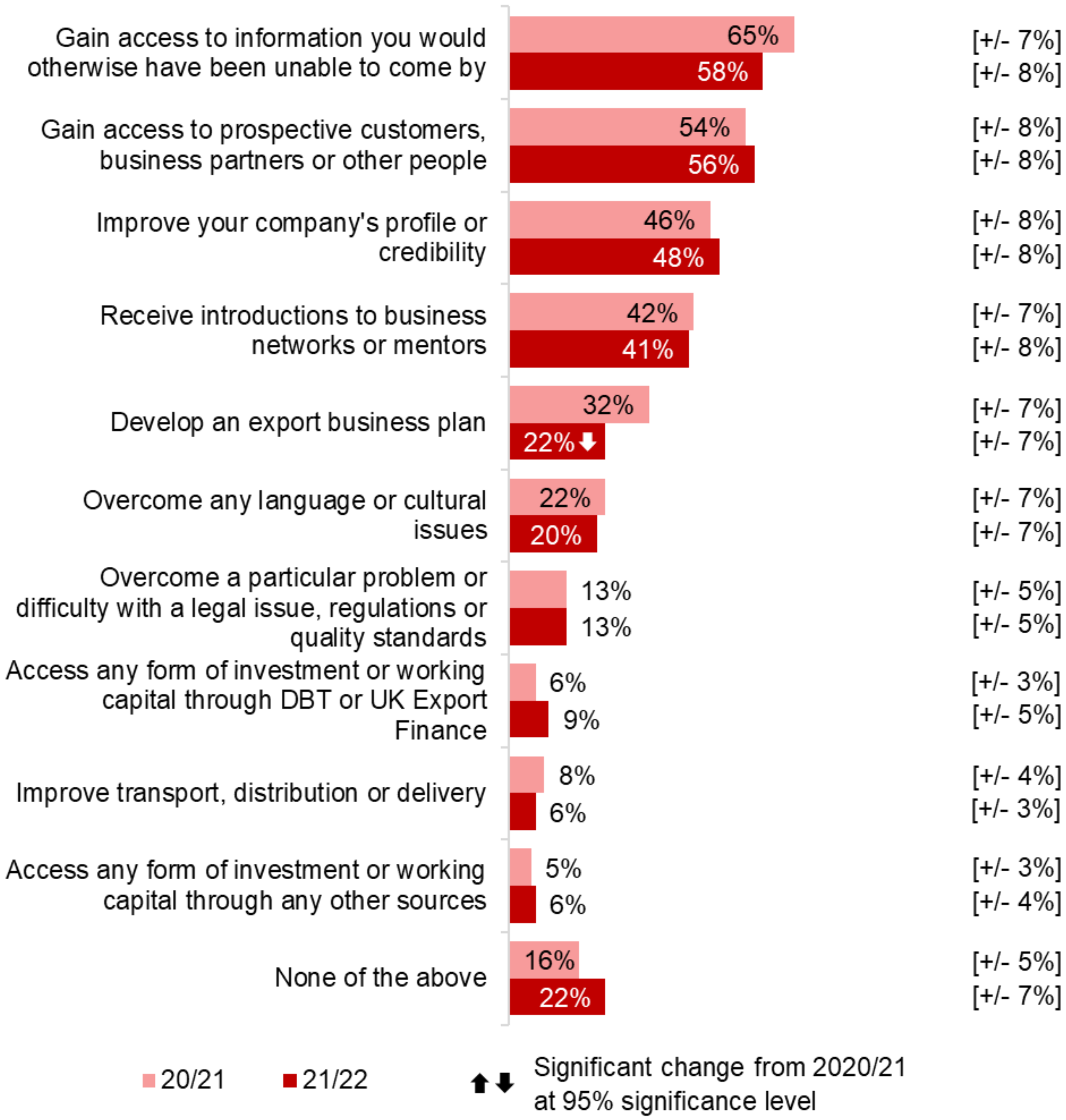
QImproveKnowledge: Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of the service? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used Posts not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Businesses were asked about other ways they had benefitted from using Posts in the year between dealing with the Posts and taking part in the RIS. A detailed breakdown of responses is shown in Chart 4.2.15.

The top responses were: helping businesses to gain access to information that they would otherwise have been unable to come by (58%), or gaining access to prospective customers, business partners or other people that they otherwise would have been unable to meet (56%). Around two in ten (22%) felt that using the Posts service had not helped them in any of the ways listed.

Compared to the RIS 2020/21, there was a decrease in the proportion of businesses that developed an export business plan, from 32% to 22% (in RIS 2020/21). There were no other significant changes compared to the RIS 2020/21.

Chart 4.2.15 In what ways has the business felt it benefited from DBT support – Posts

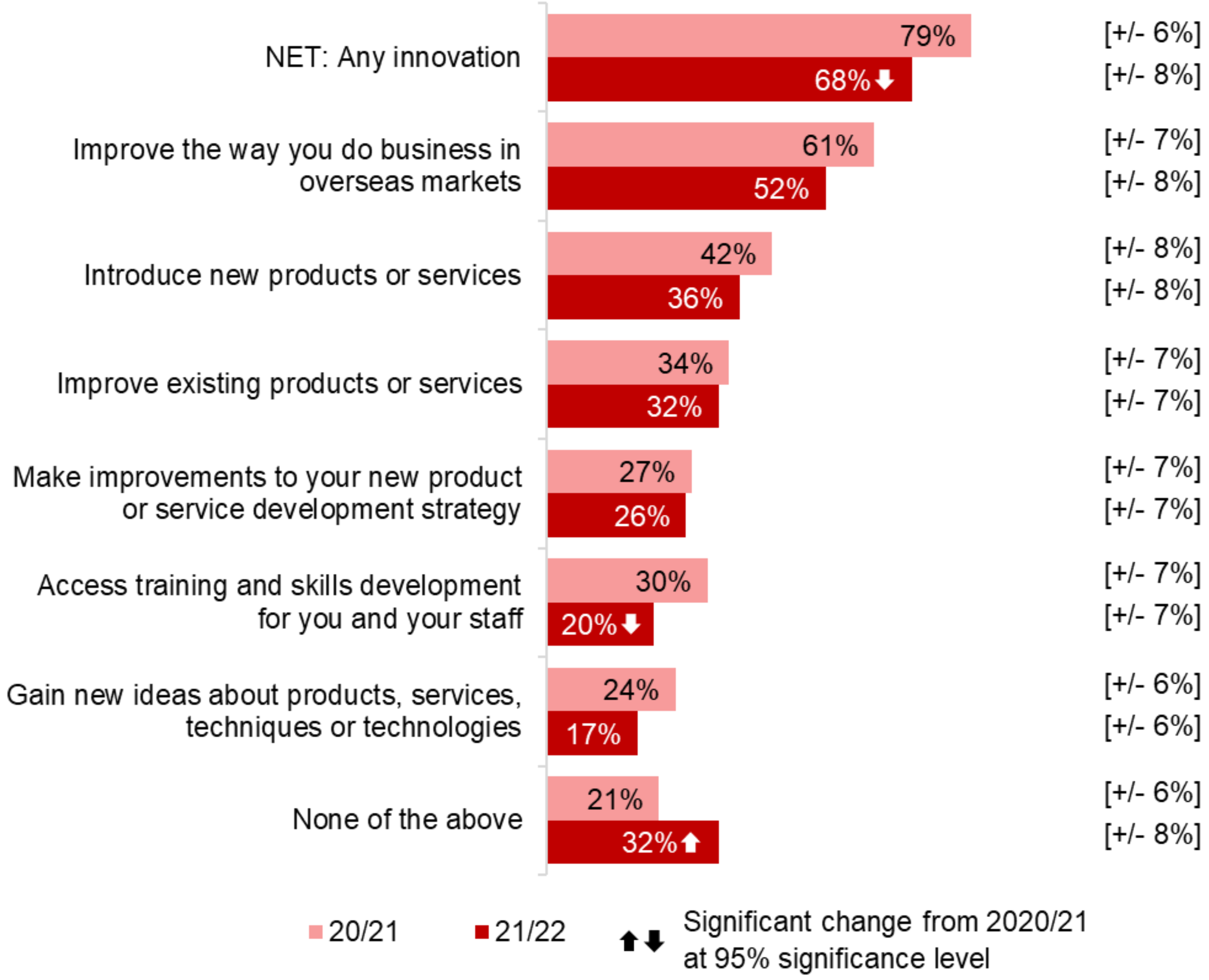


QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?
Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21))

Businesses were asked whether using the Posts service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.2.16). Two-thirds (68%, down from 79% in 2020/21) said that using the service helped them with innovation or development in some form. The most frequent responses were: to improve the way they do business overseas (52%), to introduce new products or services (36%) and to improve existing products or services (32%).

Compared to the RIS 2020/21, there was a decrease in the proportion of businesses that accessed training and skills, from 30% to 20%.

Chart 4.2.16 Whether the service has / is likely to help innovation and development – Posts



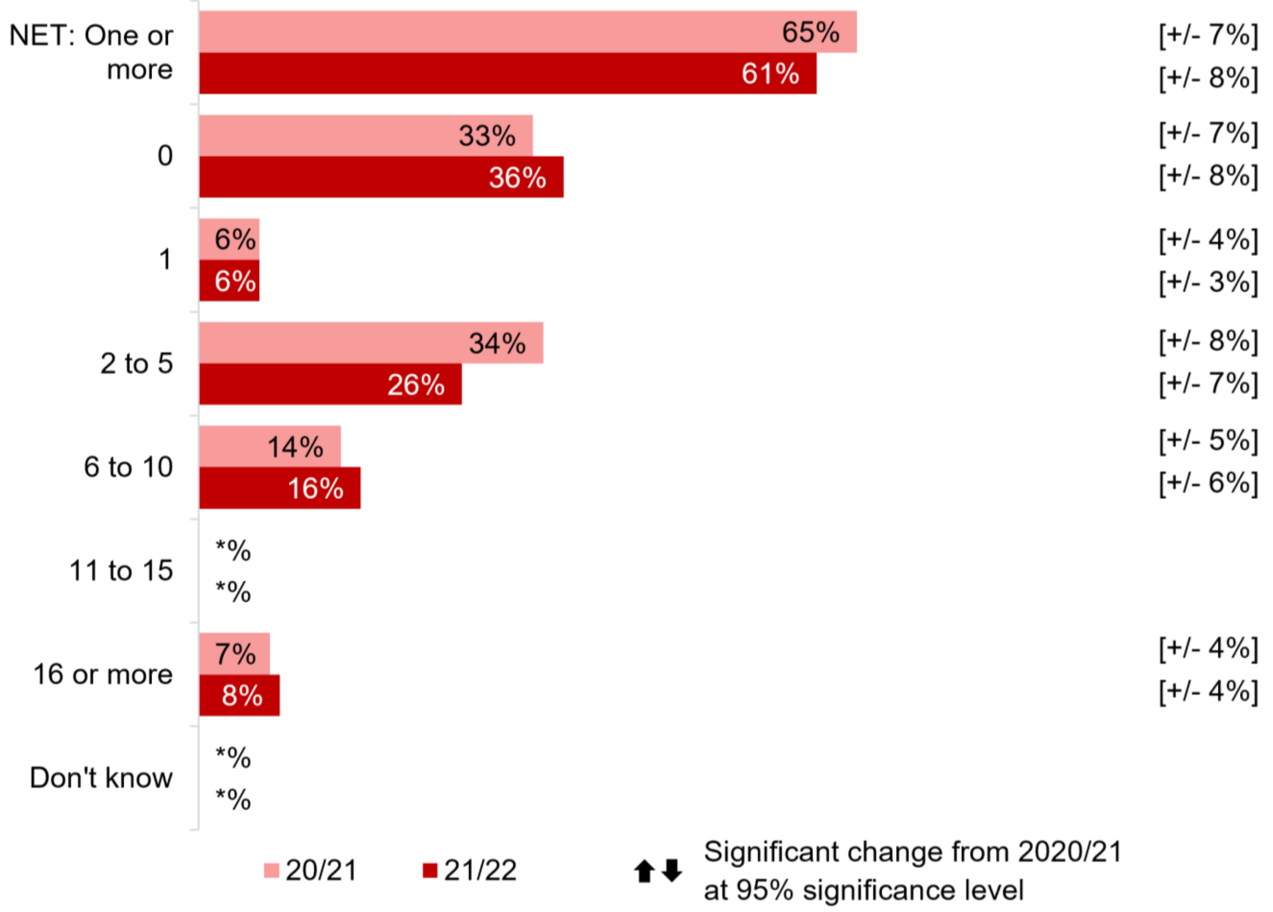
QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation?
Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21))

International contacts

Businesses were asked how many overseas contacts they had made as a result of using Posts over the past year (Chart 4.2.17). Around six in ten (61%) businesses made at least one new overseas contact in the year since using the Posts service, and a quarter (26%) made between two and five new contacts. More than a third (36%) of businesses reported that they had not made any new contacts as a result of using the Posts service. These findings were in line with the RIS 2020/21.

The median number of contacts made was four, the same as in the RIS 2020/21.

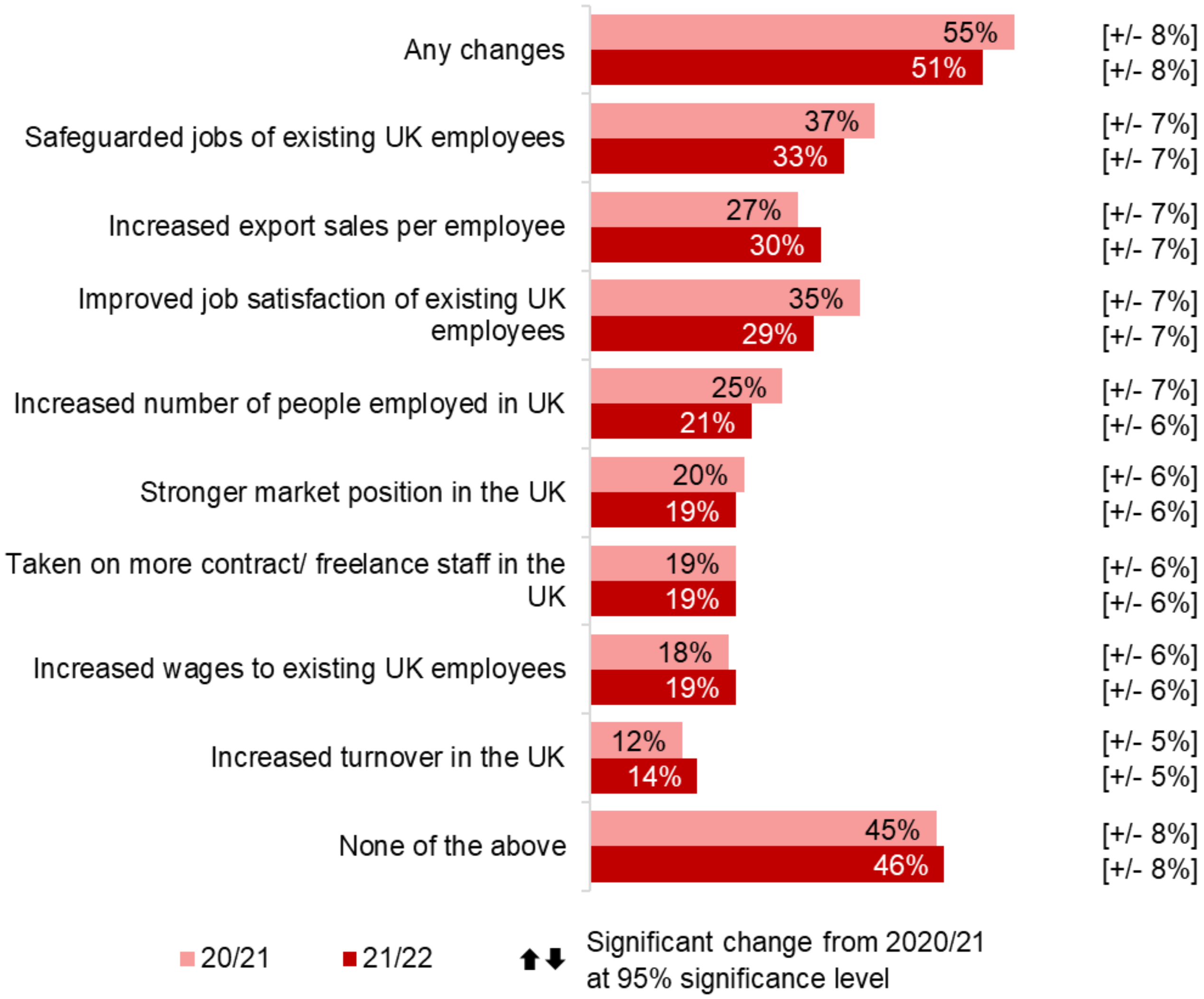
Chart 4.2.17 Number of new overseas contacts made in previous 12 months – Posts



QContactsMade: How many new overseas contacts, if any, did your business make as a result of the service in the past year?
*Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21)) *Redacted*

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Posts service (Chart 4.2.18). A third of businesses (33%) said they thought using the Posts service had, or would, safeguard jobs in the UK, and three in ten said it increased export sales per employee (30%) and improved job satisfaction of existing UK employees (29%). These findings are in line with a previous year.

Chart 4.2.18Changes expected / seen in the UK business as a result of receiving the service – Posts

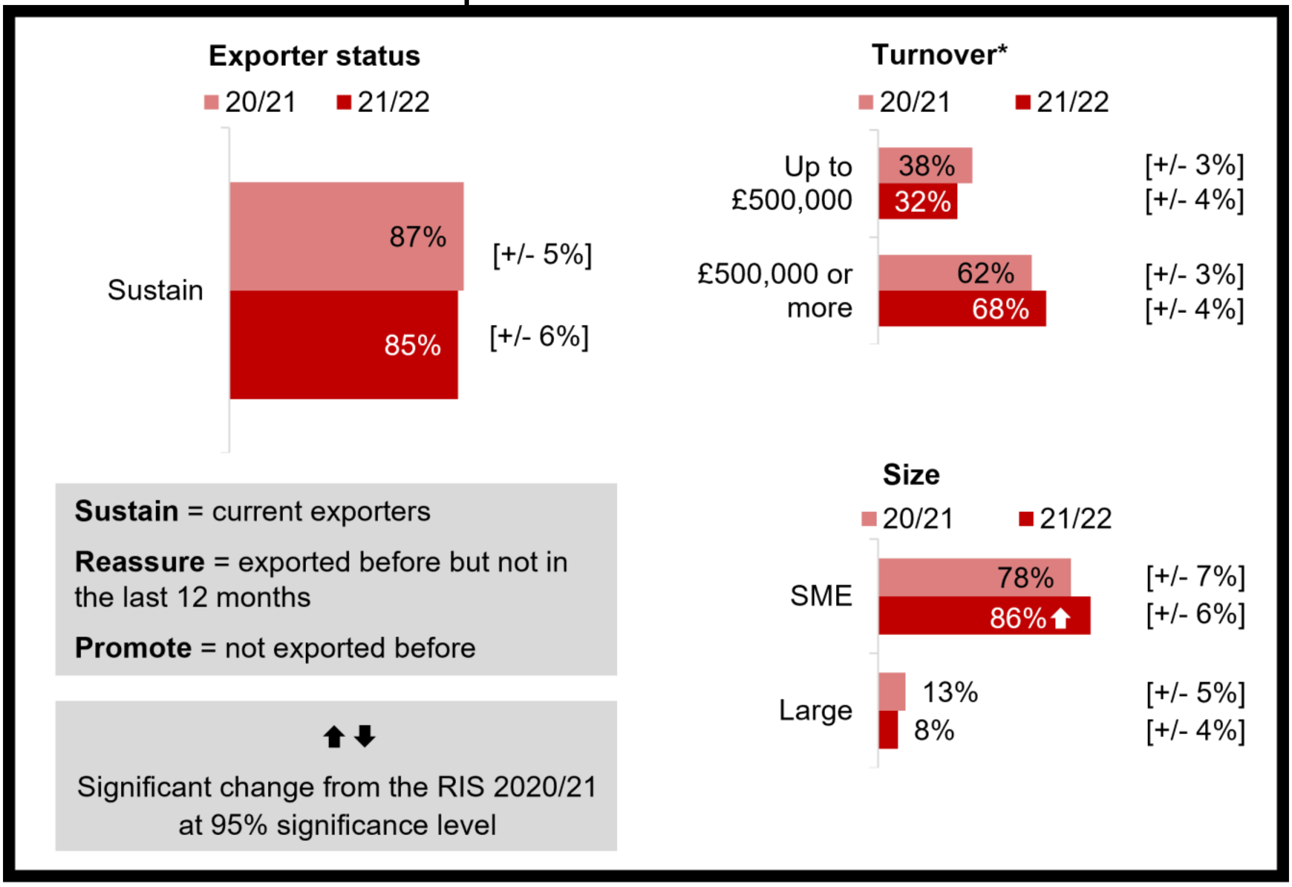


QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?
Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21))

4.2.10 Profile of respondents

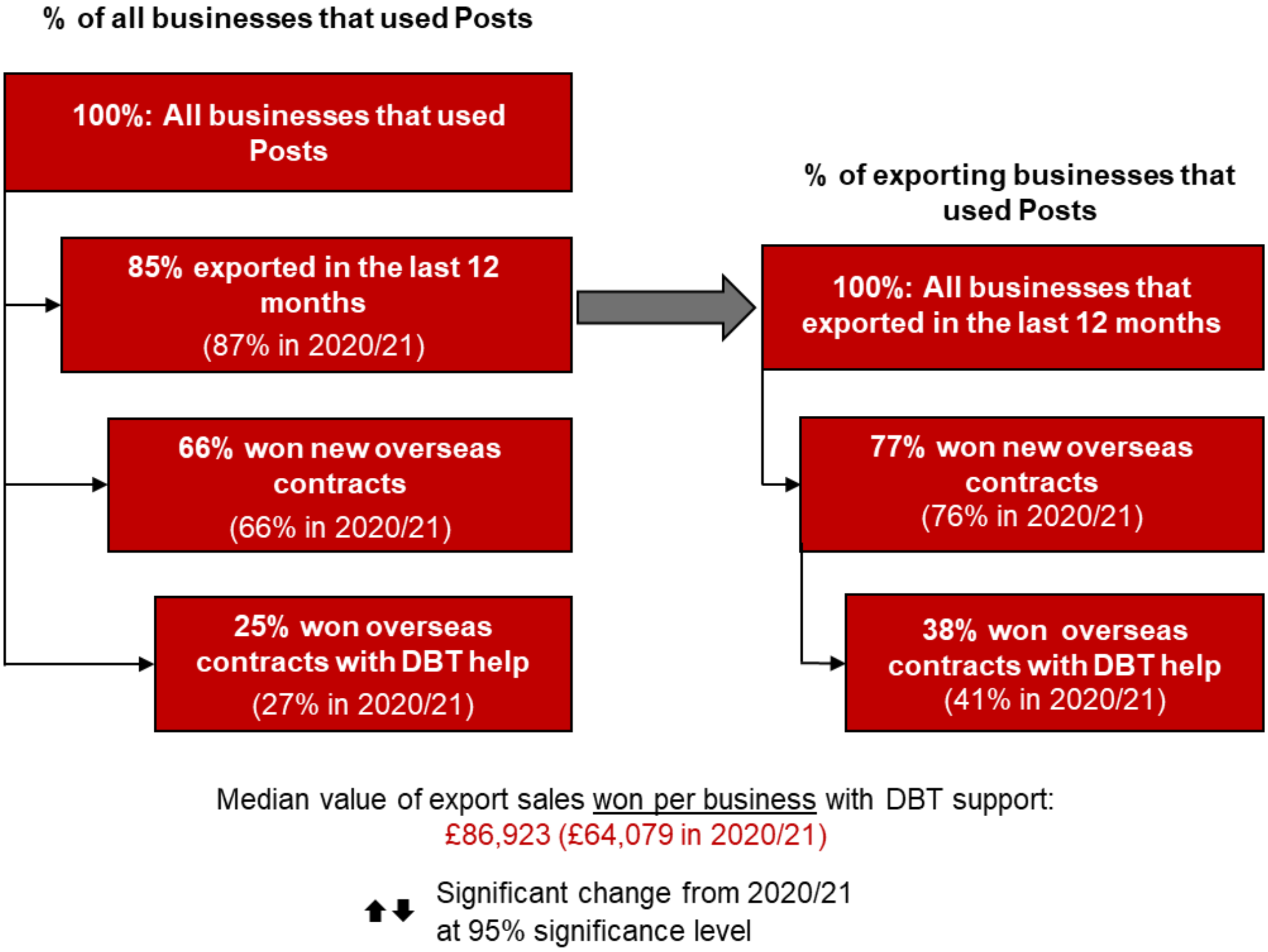
As shown in Chart 4.2.19, businesses supported by Posts interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the RIS), almost nine in ten (85%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. The turnover profile of the businesses supported by Posts in the survey remained in line with the previous year, while there was an increase in the proportion of SMEs (86%, up from 78% in 2020/21).

Chart 4.2.19 Profile of RIS Respondents – Posts



*Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21)); *All businesses that used Posts not including 'Don't know' and 'Refused' responses (n=183 (2021/22), n=234 (2020/21))*

Chart 4.2.25 Summary of businesses supported by Posts



Base: All businesses that used Posts (n=228 (2021/22), n=234 (2020/21)); All businesses that used Posts and that exported in the last 12 months (n=198 (2021/22), n=203 (2020/21); All businesses that used Posts and that won at least one overseas business contract in the last 12 months (n=158 (2021/22), n=151 (2020/21); All businesses that used Posts and that won at least one overseas business contract with the help of DBT (n=55 (2021/22), n=58* (2020/21). *Small base size.*

4.3 Export Academy

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

This chapter explores the impact of using the Export Academy service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 251 businesses that used Export Academy between April 2021 and March 2022 and participated in both the Quality Survey (QS) and RIS.

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

4.3.1 Summary of reported impact as a result of Export Academy support (from RIS)

Actions taken as a result of using Export Academy

Following their use of the Export Academy service, nine in ten (88%) businesses had taken some sort of action as a result of using the service. Nearly three in five businesses had identified new export opportunities or made new contacts (57%) and researched the paperwork and regulations needed to export (56%). Among non-exporters, three in five (60%) businesses had assessed their readiness to export after using Export Academy.

Impact on exporting

Four fifths (80%) of businesses classified as ‘Sustain’ (i.e. currently exporting) in line with findings from the QS 2021/22 (75%).

A third (32%) of businesses classified as ‘Promote’ (i.e. never exported before) in the QS 2021/22 had shifted to ‘Sustain’ in the RIS 2021/22.

Impact on winning contracts

Of the businesses that exported, eight in ten (81%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Export Academy service.

Overall, 58% of businesses won a new overseas contract, including 20% saying this was with Export Academy or DBT assistance. Among businesses that reported DBT support was important in helping them win these contracts, 3% said they would not have been able to do this without DBT, and 11% said it would have been unlikely to be able to do this without DBT.

Impact on exposure and growth

Three quarters (74%) of businesses who won any new overseas business contracts with the help of DBT said Export Academy assisted with expansion into a new market, and four fifths (80%) said Export Academy assisted with expansion within an existing market.

Among all businesses, around one in five (17%) reported being exposed to or starting to do business in at least one new market. Among these businesses, Europe was the most common new market for increased exposure or business. Half (52%) of these businesses reported having increased exposure or business in Europe.

Impact on contacts and networks

Two fifths of businesses (41%) made at least one new overseas contact after using Export Academy (two contacts on average), although 58% reported DBT support did not make any difference to making exporting contacts.

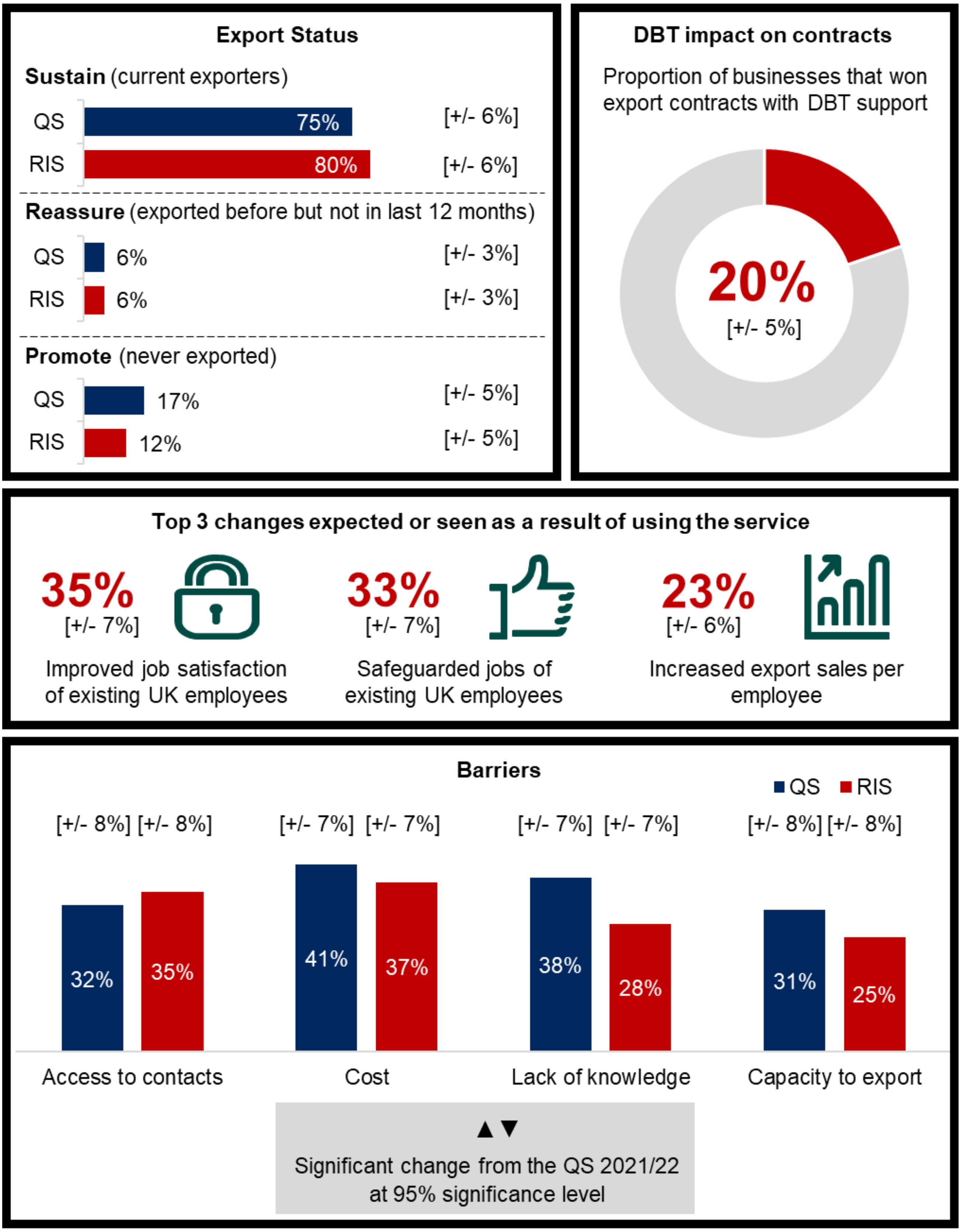
Impact on confidence

A third (33%) reported that using the Export Academy service boosted their confidence to export in a new market, while a similar proportion (32%) said this for increasing exports in an existing market.

Other impact

Two thirds (66%) of Export Academy respondents reported that the Export Academy service helped them to gain access to information that they would otherwise have been unable to come by.

Chart 4.3.1 Key indicators from the RIS (Export Academy)



Base: All businesses that used Export Academy and completed both surveys (n=251); Barriers - Access to contacts (QS n=249, RIS n=246), Cost (QS n=248, RIS n=247), Lack of knowledge (QS n=248, RIS n=248), Capacity to export (QS n=244, RIS n=244)

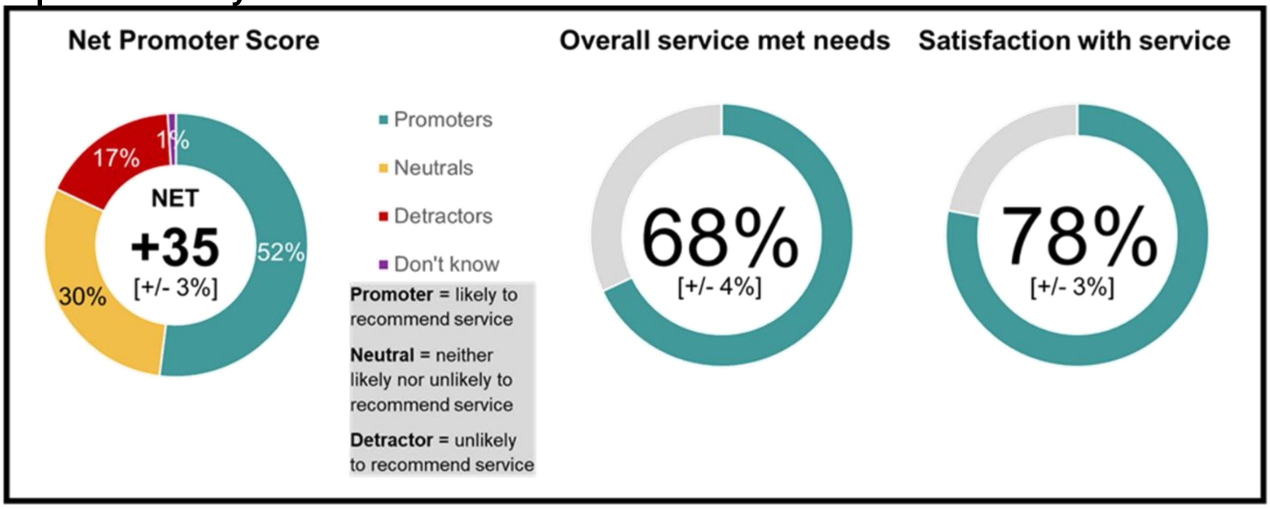
4.3.2 Satisfaction with Export Academy (from Quality Survey)

In the QS 2021/22, half of businesses (52%) that used Export Academy said they would recommend the service, while around one in five (17%) said they would not. This gave Export Academy a Net Promoter Score (NPS) of +35. Four fifths (78%) reported they were satisfied with the Export Academy service, and two thirds (68%) said the overall service met their needs.

Export Academy respondents were particularly positive about the staff knowledge (90%), the straightforwardness of the registration process (85%) and the comprehensiveness of information (85%).

As a result of using Export Academy, half of businesses (53%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all Export Academy respondents, 48% said they had researched the paperwork and regulations needed to export.
Export Academy respondents were most likely to report that 'lack of knowledge' was a barrier to exporting (41%).

Chart 4.3.2 Net Promoter Score and Satisfaction with service (from Quality Survey) – Export Academy



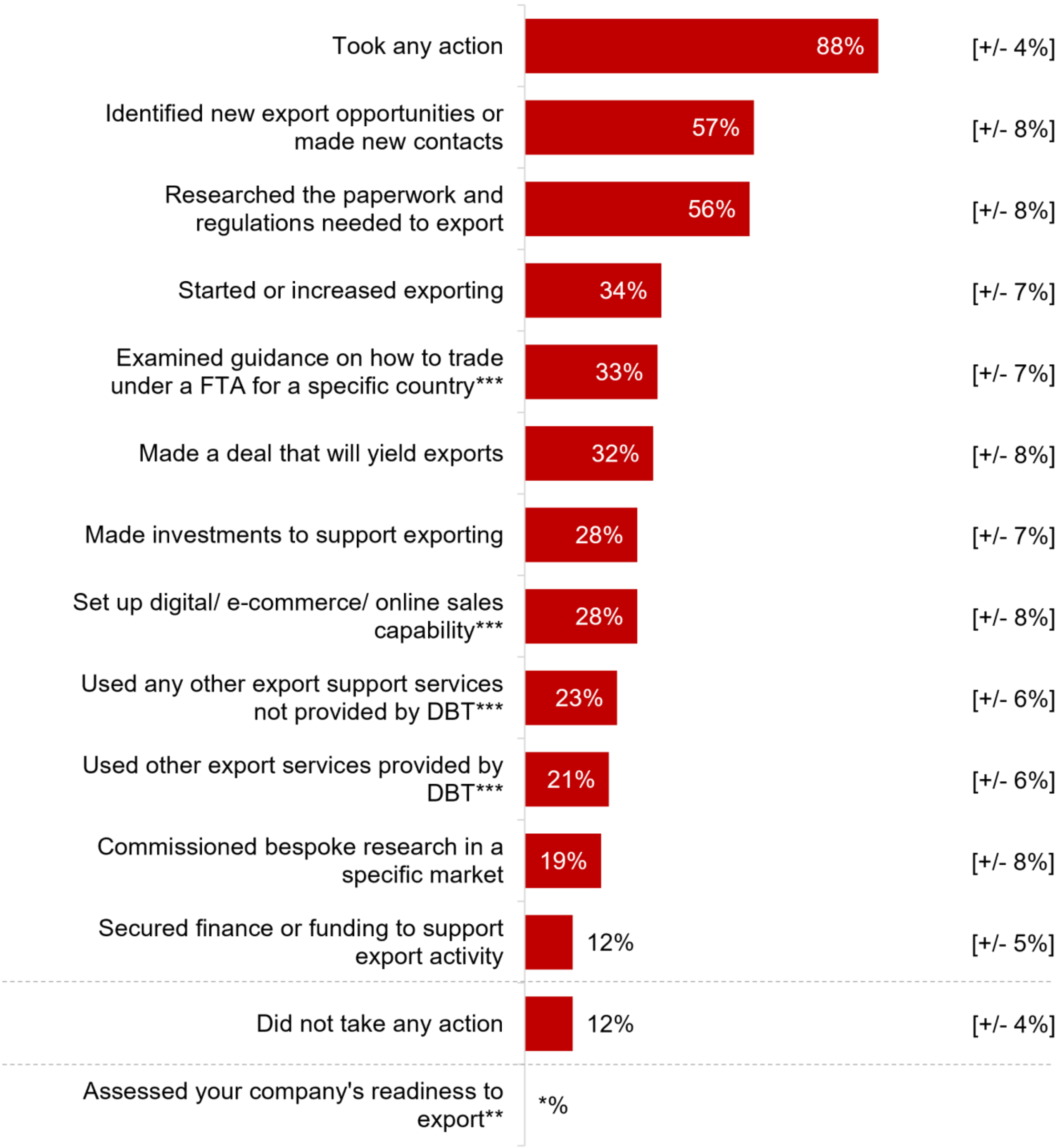
From the Quality Survey 2021-22:
Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Export Academy (n=654).
Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used the Export Academy service (excluding 'not applicable' responses) (n=634).
Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Export Academy (excluding 'not applicable' responses) (n=648).

4.3.3 Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the Export Academy service (Chart 4.3.3). Nearly three in five businesses had identified new export opportunities or made new contacts (57%) or researched the paperwork and regulations needed to export (56%).

Securing finance or funding to support export activity was more common among businesses with a high turnover of over £500,000 (22%) than among those with lower turnovers (8%).

Chart 4.3.3 What the business has done as a result of receiving the service – Export Academy

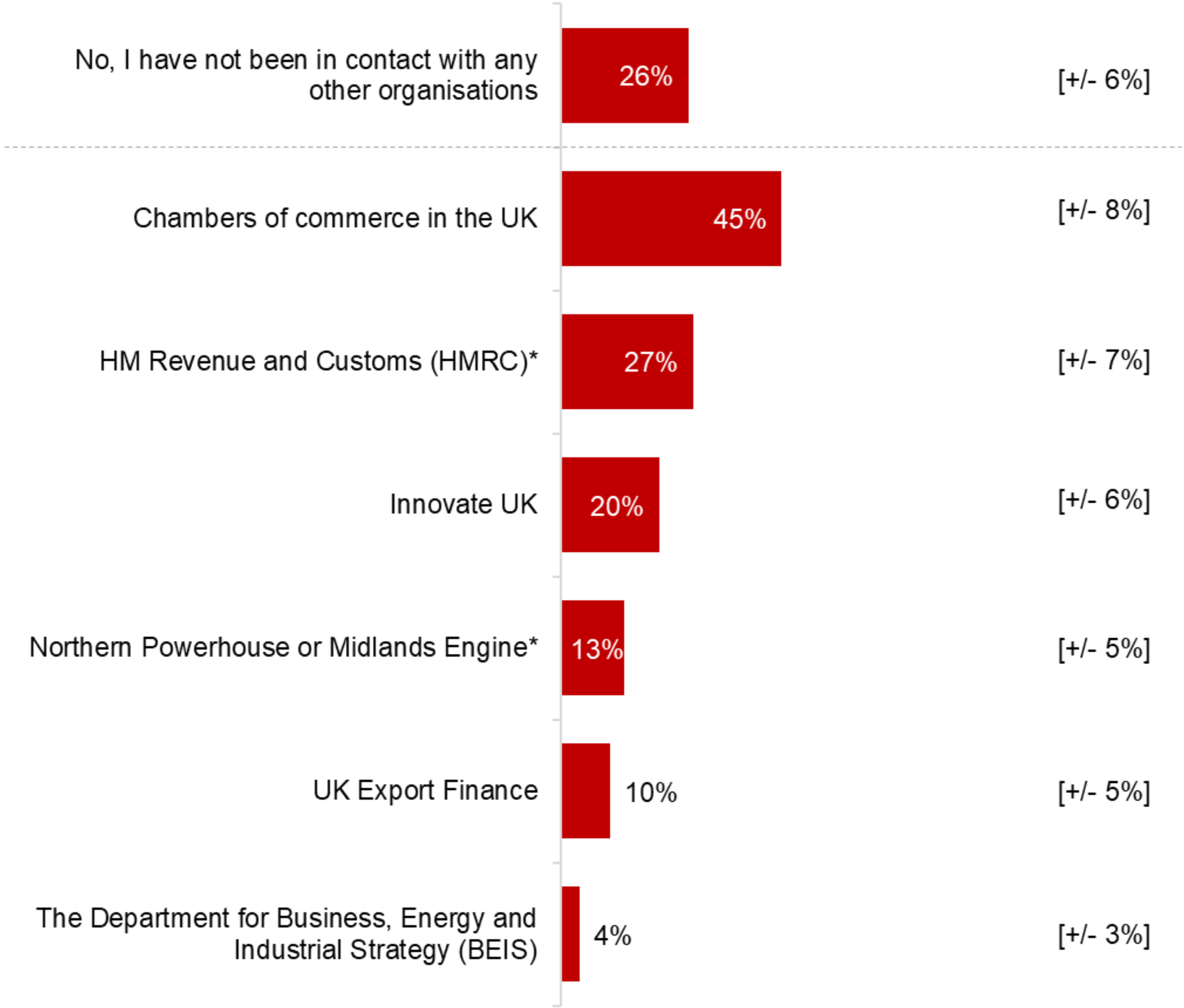


QResultService: What has your business done as a result of the service?
Base: All businesses that used Export Academy (n=251); All businesses that used ITAs and were non-exporters (n=). *** Code amended or added in 2021/22; ** Asked to non-exporters only. *Redacted due to small base size*

Businesses were asked what organisations they had been in contact with since using Export Academy (Chart 4.3.4). Over two fifths (45%) had been in contact with the British

Chambers of Commerce and over a quarter (27%) had been in contact with HMRC. One in five (20%) had been in contact with Innovate UK. A quarter (26%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Chart 4.3.4 What organisations respondents have been in contact with since receiving the service – Export Academy



QAnyContact: Since your business used the service 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 businesses that used Export Academy (n=251). Coded responses with 5% or more in 2021/22 are included. * Code amended or added in 2021/22*

4.3.4 Reported impact on exporting

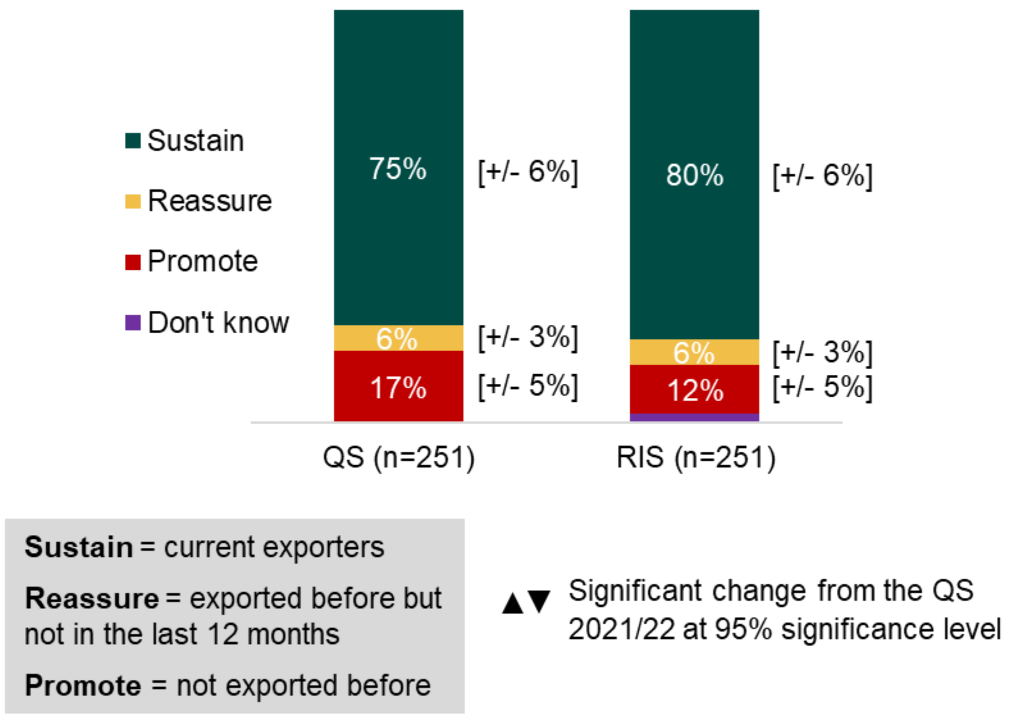
Businesses that used Export Academy were asked about their export status, both at the time they accessed the Export Academy service in the Quality Survey, and their export status 12 months later in the RIS (Chart 4.3.5). Responses from the two surveys were analysed to see whether the export status of these businesses has changed over this period. DBT 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. Three quarters of businesses (75%) that used Export Academy fell into this segment at the time of the service delivery (QS 2021/22). This remained in line in the RIS 12 months later (80%).

- **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. Among Export Academy users, 6% fell into this segment at the time of the service delivery (QS 2021/22), and this was unchanged 12 months later (6%).

- **Promote**: refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. Around one in five (17%) that used Export Academy were in this segment at the time of the service delivery (QS 2021/22). This remained in line in the RIS 12 months later (12%).

Chart 4.3.5 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Export Academy



Source: Composite measure merging data from several variables.
Base: All businesses that used Export Academy and completed both surveys (Quality Survey: n=251; RIS: n=251)

The export status of some businesses changed between the time of the service delivery and 12 months later in the RIS (see Table 4.3.1).

Nearly half (45%) of businesses from the Reassure segment moved to Sustain, 3% of businesses in the Sustain segment moved to Reassure, and 1% moved from the Sustain segment to Promote.

Table 4.3.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Export Academy

Quality Survey Export status	RIS Export status	Percentage
Sustain (n=107)	Sustain	**95%** [+/- 4%]
	Reassure	**c**
	Promote	**c**
Reassure (n=c)	Sustain	**c**
	Reassure	**c**
	Promote	**c**
Promote (n=c)	Sustain	**c**
	Reassure	**c**
	Promote	**c**

c Cells have been suppressed to protect confidentiality

*Source: Composite measure merging data from several variables. Some movements are not logically possible and may represent respondent error. Data only includes respondents that provided details of their export status in both surveys. *Small base size*

Considering businesses that were in the Sustain segment at the time of the Quality Survey (107 businesses), 95% continued in Sustain.

4.3.5 Reported export contracts achieved since receiving the service

Businesses that had exported in the previous 12 months were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the Export Academy service (Chart 4.3.6). Businesses were asked to think about all contracts, not just those assisted by Export Academy or DBT.

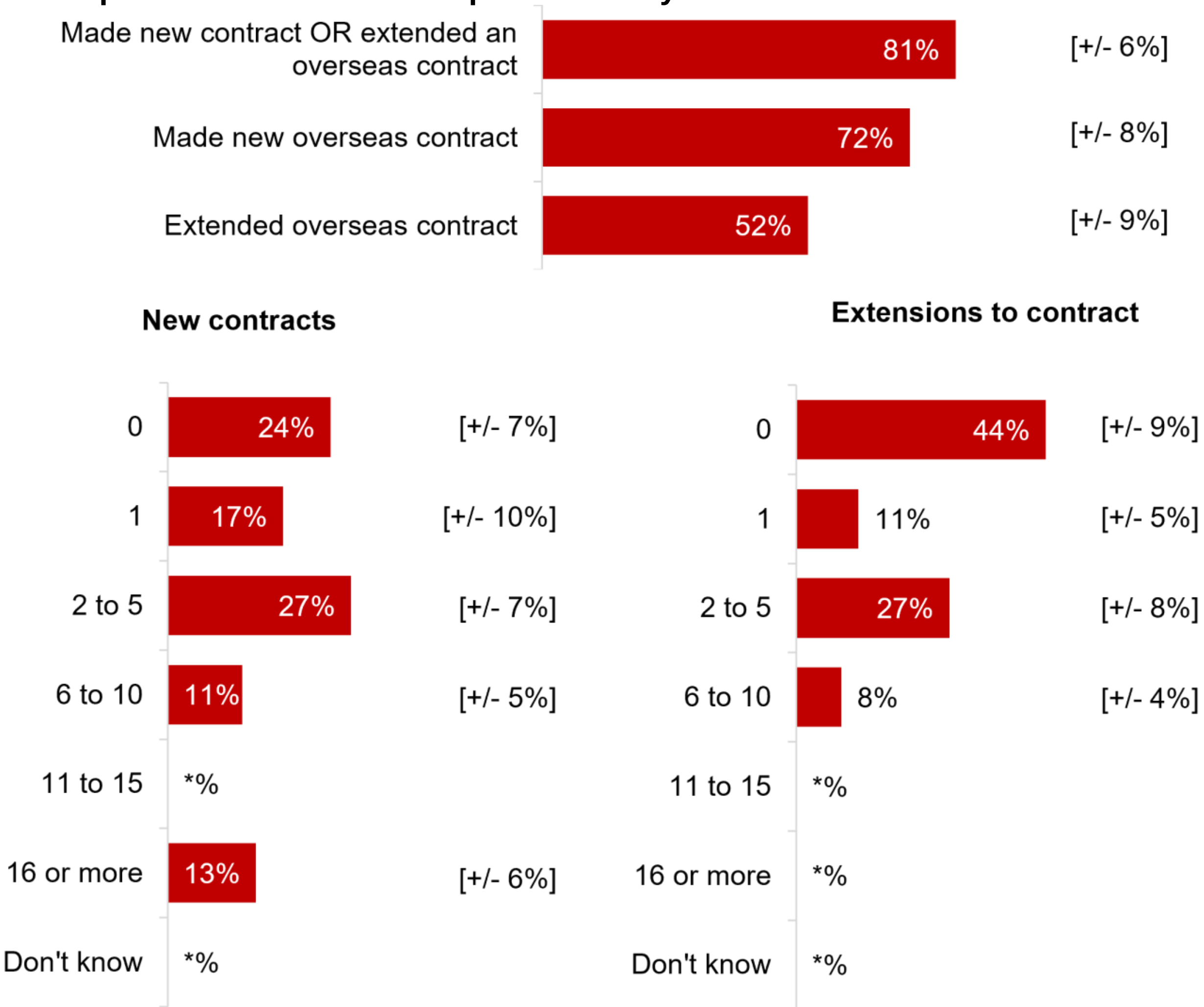
Of the 80% of businesses that had exported, 81% reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service.

Around three-quarters (72%) of these exporting businesses had won new overseas business contracts in the year since they used the service (Chart 4.3.6). Specifically, 17% had won one overseas contract, and a quarter (27%) had won between two and five overseas contracts. Over one in ten (13%) businesses had won more than 16 overseas contracts (Chart 4.3.6). The median number of contracts won among exporting businesses that had used Export Academy was one.[18]

Half (52%) of exporting businesses that used the Export Academy reported they had gained extensions to existing overseas business contracts in the year since they used the service, with 11% extending one contract, a quarter (27%) extending between two and five contracts, and 6% extending more than 16 contracts. Over four in ten (44%) businesses had not extended any existing contracts (Chart 4.3.6). The median number of contracts extended (including those that did not extend any) was zero.

[18] This is taken from the 90% that exported and could also provide a figure for the number of contracts won. It includes those that export but did not win any new contracts in the 12 months since they used the service.

Chart 4.3.6 Proportion of businesses that exported and reported they had made new overseas contracts and / or extended existing contracts, and number of contracts made in previous 12 months – Export Academy[19]



QNewcontract: How many new overseas business contracts for export sales did you win in the past year?
QExtendcontract: How many extensions to existing overseas business contracts for export sales did you win in the past year?
*Base: All businesses that used Export Academy and were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=197), All businesses that used Export Academy and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=194) *Redacted*

Reported additional contracts which were gained because of DBT support

Businesses that exported and that had won at least one new contract in the 12 months since the delivery of the Export Academy service were asked whether they could estimate the number of contracts won with the assistance of Export Academy or DBT (Chart 4.3.7). In total, 138 businesses (that is 55% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

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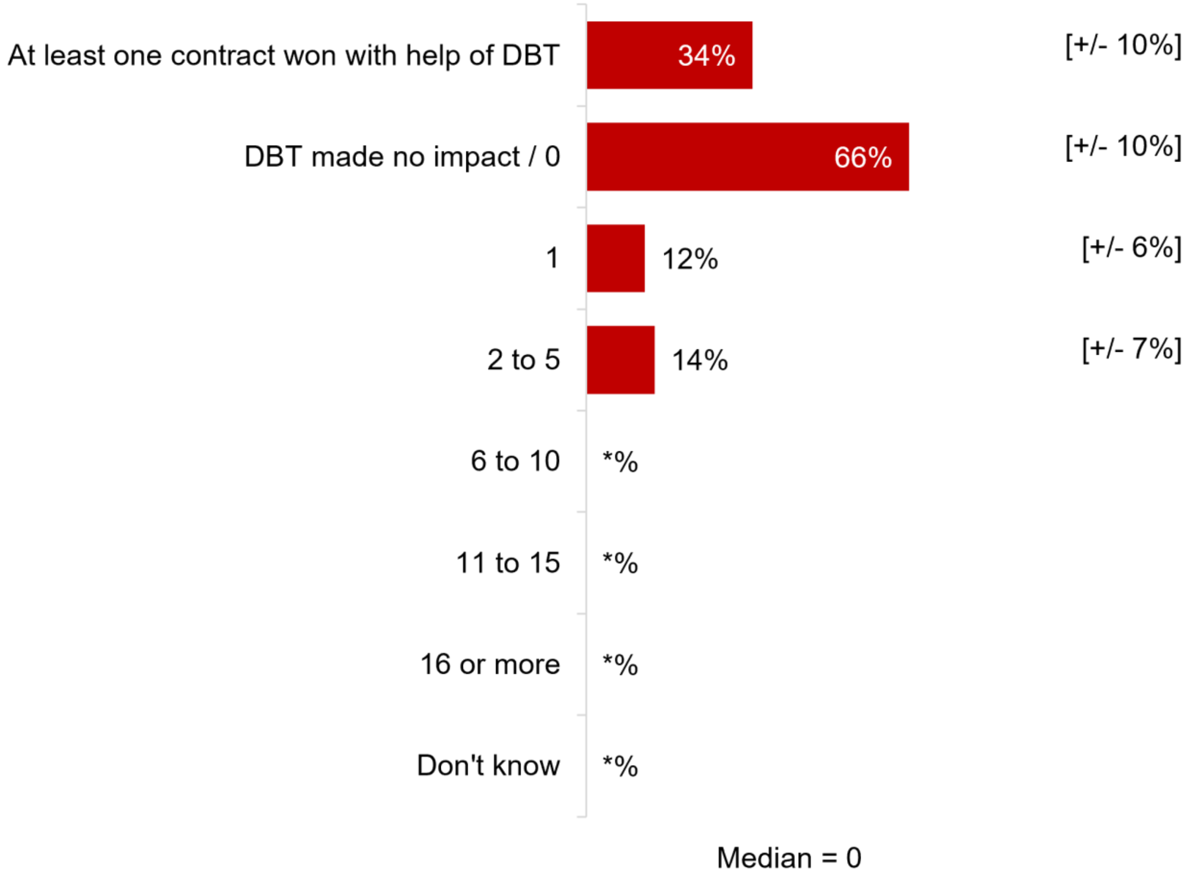
[19] The total percentage of all responses for this question may not sum to 100% due to rounding.

As shown in Chart 4.3.7 below, two thirds of these businesses (66%) said they won no new overseas sales contracts with the help of DBT, or using DBT services made no impact. Around one in eight (12%) had won one new overseas contract, and a similar proportion (14%) had won between two and five contracts. The median number of contracts that DBT helped win was zero[20], for current exporters that used Export Academy.

Chart 4.3.7 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – Export Academy



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 DBT?
QContractNumber: How many new overseas contracts were won with help from DBT?
*Base: All businesses that used Export Academy and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=138). Median values include zero. *Redacted*

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.3.8). Among all businesses that had used Export Academy, 58% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, we

[20] This includes businesses that reported the Export Academy service did not help them to win any contracts.

estimate that 20% of Export Academy respondents had won contracts with help from DBT, while 38% of Export Academy respondents said they had won contracts without help from DBT.

Chart 4.3.8 Proportion of businesses reported to have won or not won new overseas contracts, and the proportion of businesses estimated to have won new overseas contracts with or without DBT support – Export Academy

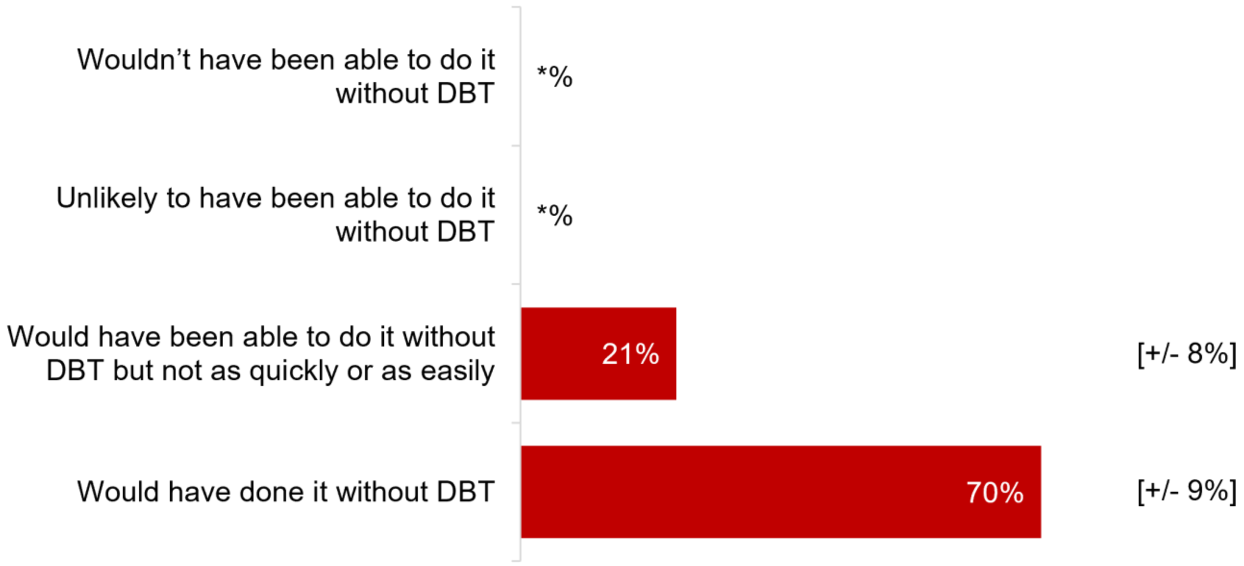
Source: Composite measure merging data from several variables.
Base: All businesses that used Export Academy (n=251)

Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT's support in winning overseas contracts. This question was asked to businesses that reported they had won at least one overseas business contract with the help of DBT in the last 12 months, since the delivery of the Export Academy service. Exporting businesses who said that DBT made no impact or did not help them win any new contracts were not asked this question. However, they have been included under 'would have done it without DBT' to better understand the level of support that the Export Academy service provided.

Around three in ten of these businesses (31%) reported that DBT support was important in helping them win these contracts to some extent. This includes 3% who said they would not have been able to do it without DBT, and 7% who thought it was unlikely they could have done it without DBT. One in five (21%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.3.9). The remaining 70% thought they would have been able to achieve the same outcome without DBT support.

Chart 4.3.9 How important DBT's help was in winning overseas contracts – Export Academy



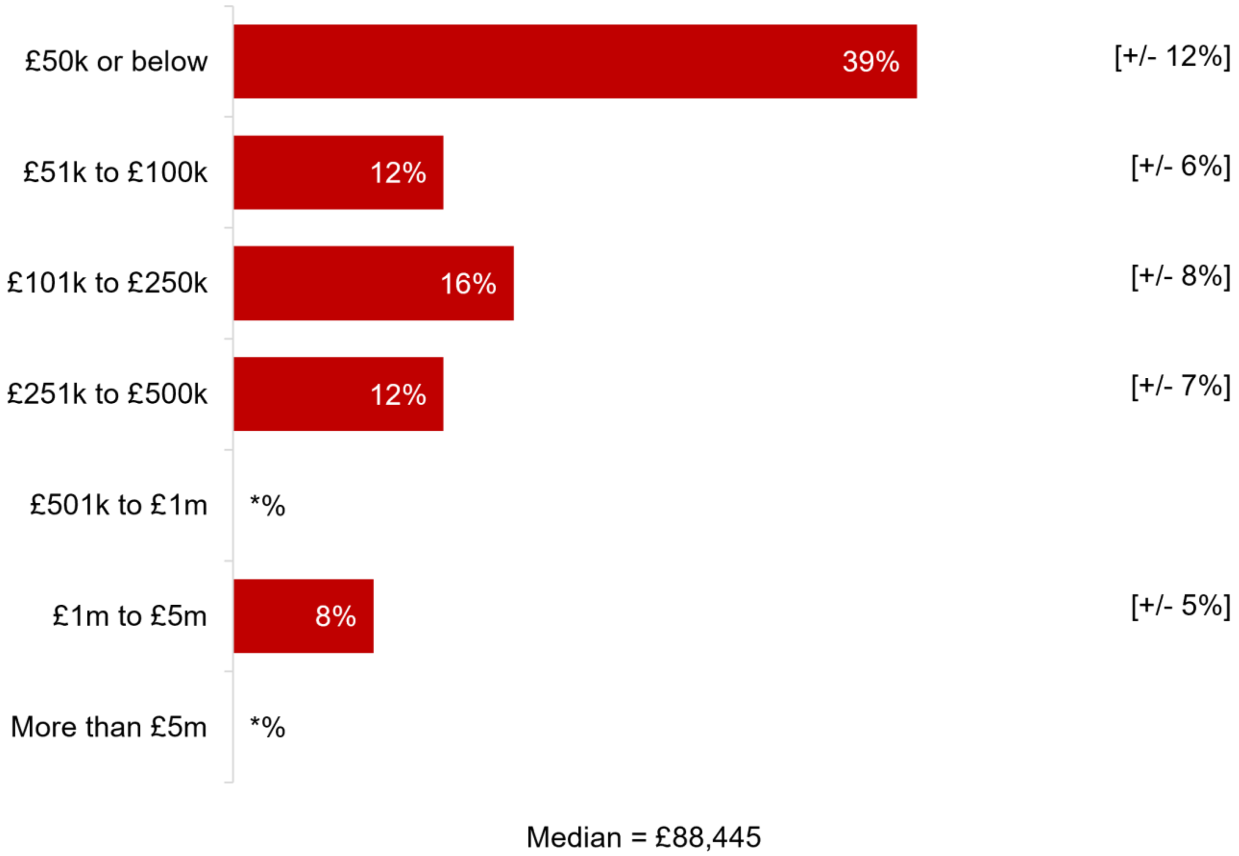
QContractHelp: How important was DBT's help in winning these overseas contracts?
*Base: All businesses that used Export Academy and won any new overseas contracts in the past year (n=138) *Redacted*

4.3.6 Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 58% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts, in total (Chart 4.3.10). The median value of the export sales of all new overseas contracts for these businesses was £88,445. Two fifths (39%) had won contracts with an export sales value of £50,000 or below, while 11% said that the export sales value of the new overseas contracts won was more than £1 million.

Chart 4.3.10 Value of all new overseas contracts made in previous 12 months – Export Academy



QContractValue: What is the value of all these new overseas business contracts for export sales?
*Base: All businesses that used Export Academy and won any new overseas business contracts (n=138) *Redacted*

Reported additional value of DBT support

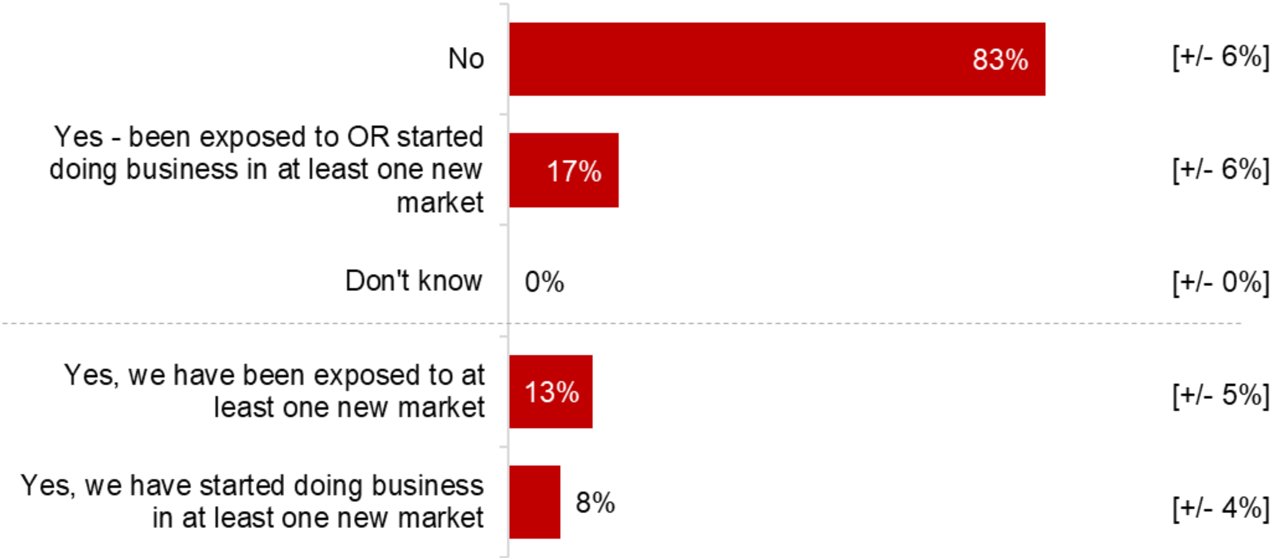
This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the Export Academy service, they were asked to think about the impact from all of their interactions with DBT. The analysis in this section measures the additional contribution that DBT made towards businesses outcomes, including the number and value of new overseas contracts made.

4.3.7 Recorded exposure and growth within new markets

All businesses that used Export Academy were asked whether they had increased their exposure or started doing business in any new markets because of using the Export

Academy service[21] (Chart 4.3.11). Four-fifths (83%) of businesses said they had not, while 13% said they had been exposed to at least one new market and 8% said they had started doing business in at least one new market as a result of using the Export Academy service.

Chart 4.3.11 Whether increased exposure or starting business in a new overseas market – Export Academy



QGrowthDIT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
Base: All businesses that used Export Academy (n=251)

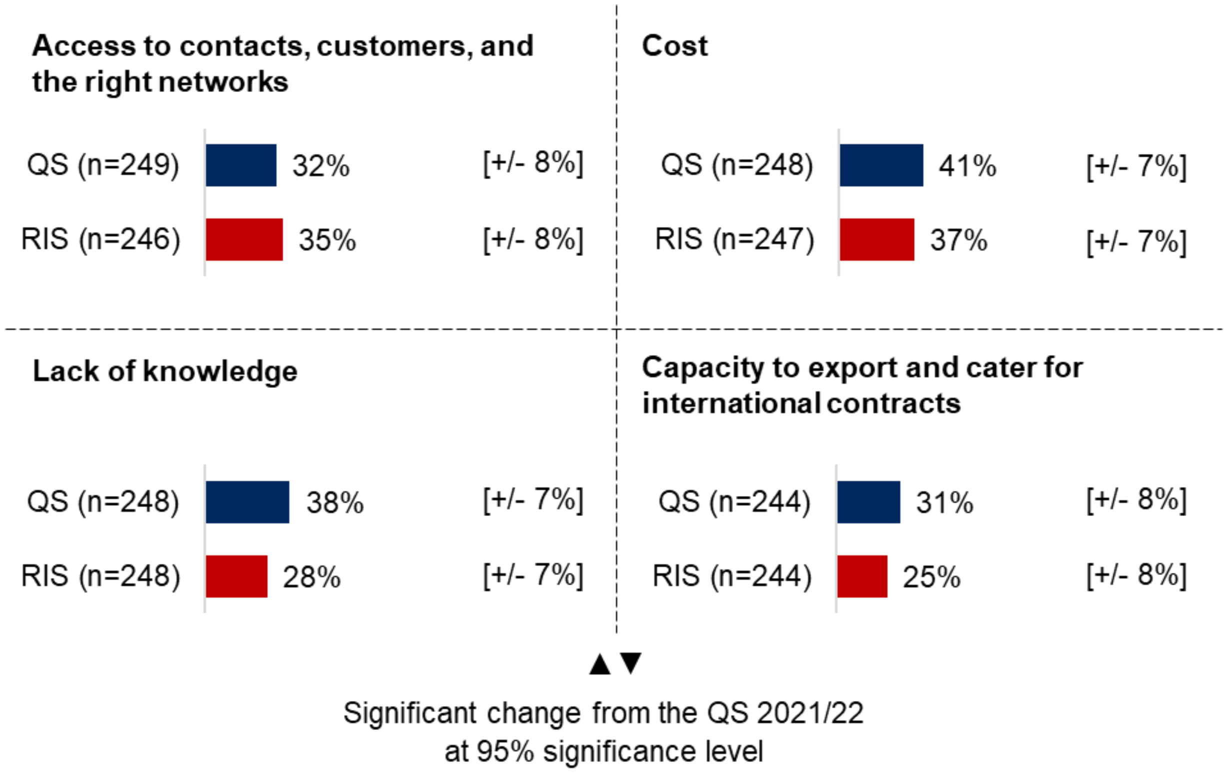
4.3.8 Barriers to exporting

Businesses were asked in both the Quality Survey and Reported Impact Survey about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)[22].

The top barrier in RIS 2021/22 was ‘cost’ (37%), followed by ‘access to contacts’ (35%).

[21] Respondents could select both if they had been exposed to at least one new market and if they had started doing business in at least one new market.
[22] This section compares results for businesses who completed both surveys and provided a response to this question in both surveys. Businesses that said a barrier was not applicable in either survey were excluded.

Chart 4.3.12 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Export Academy[23]



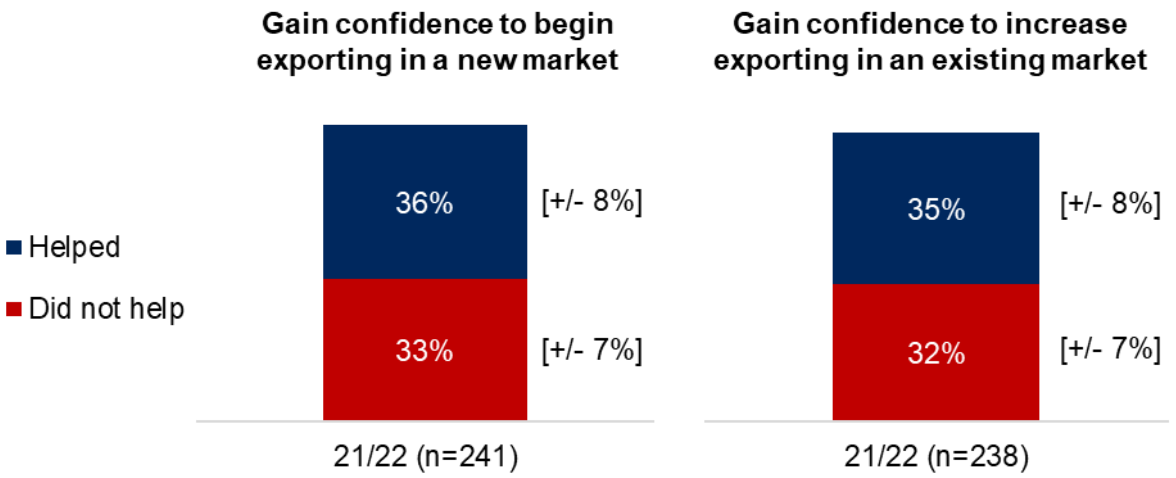
QBarrier: On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier was the following for your business when it comes to exporting? A barrier is defined as a score between 7 and 10.
Base: All businesses that used Export Academy not including those who gave a 'not applicable' answer.

4.3.9 Wider benefits of the service

Businesses were asked to think about the extent to which using the Export Academy service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market (Chart 4.3.13). Over one third of businesses reported that using the Export Academy service had given them confidence to begin exporting in a new market (36%) or to increase exporting in an existing market (35%). However, similar proportions reported that using the Export Academy service had not given them confidence to begin exporting in a new market (33%) or to increase exporting in an existing market (32%).

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

Chart 4.3.13 To what extent using the Export Academy service helped to build confidence to export – Export Academy



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 the service help you to …? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used Export Academy not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge[24].** Chart 4.3.14 shows how businesses rated the impact of using the Export Academy service on their knowledge.

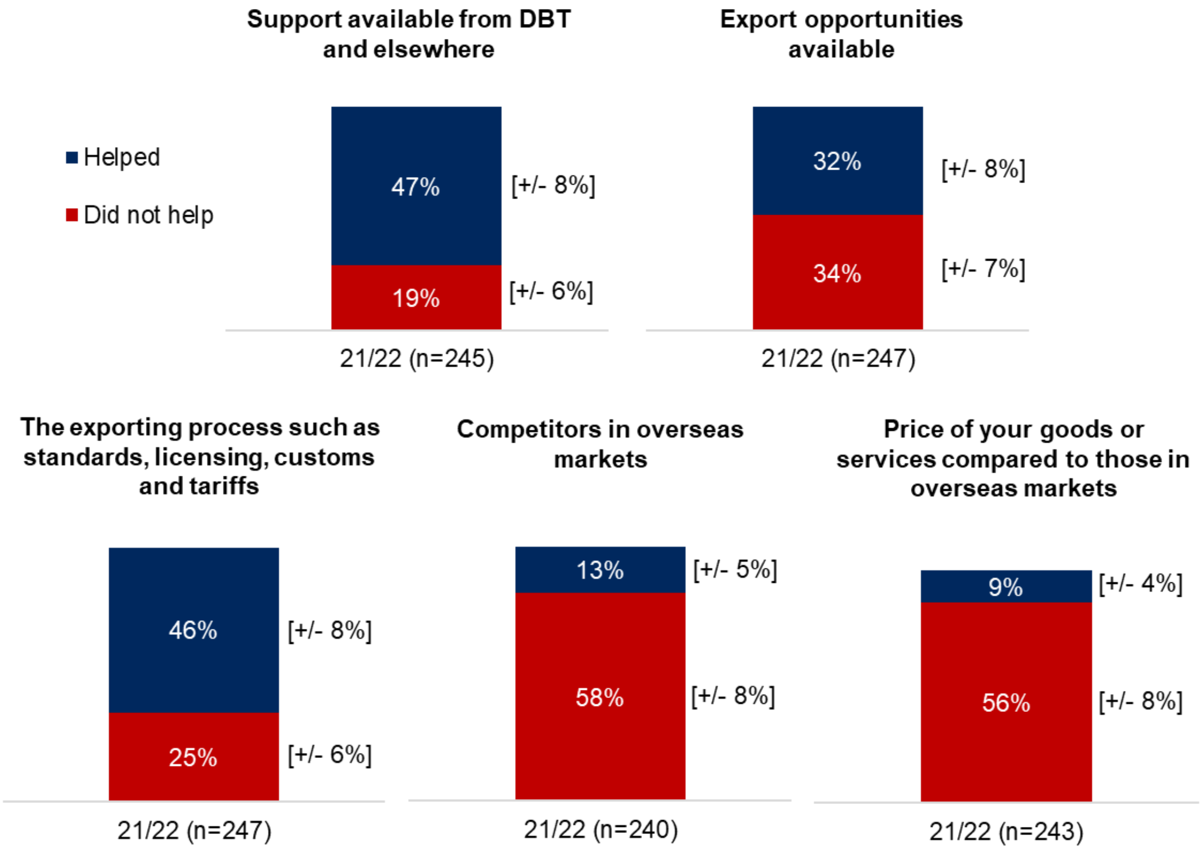
More businesses reported that using the Export Academy service was **helpful for increasing their knowledge of support available to them (from DBT and elsewhere)**. Nearly half (47%) said the service helped to do this, and one-fifth (19%) said it did not help them do this. A similar proportion (46%) of businesses said that the service **helped to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs; but a quarter (25%) of businesses that had used Export Academy said the service did not help them in this way.

On balance, more businesses reported that using the Export Academy service was **not helpful for increasing their knowledge of export opportunities available.** A third of businesses that had used Export Academy (34%) said that the service had not helped them to increase their knowledge of the export opportunities available. However, another third (32%) of businesses said they were helped in this way.

Only small proportions said that using Export Academy improved their **knowledge of the price of goods** compared with those in overseas markets (9%) or about their **competitors in overseas markets** (13%).

[24] Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

Chart 4.3.14 To what extent the business felt that their knowledge has improved as a result of using the service – Export Academy



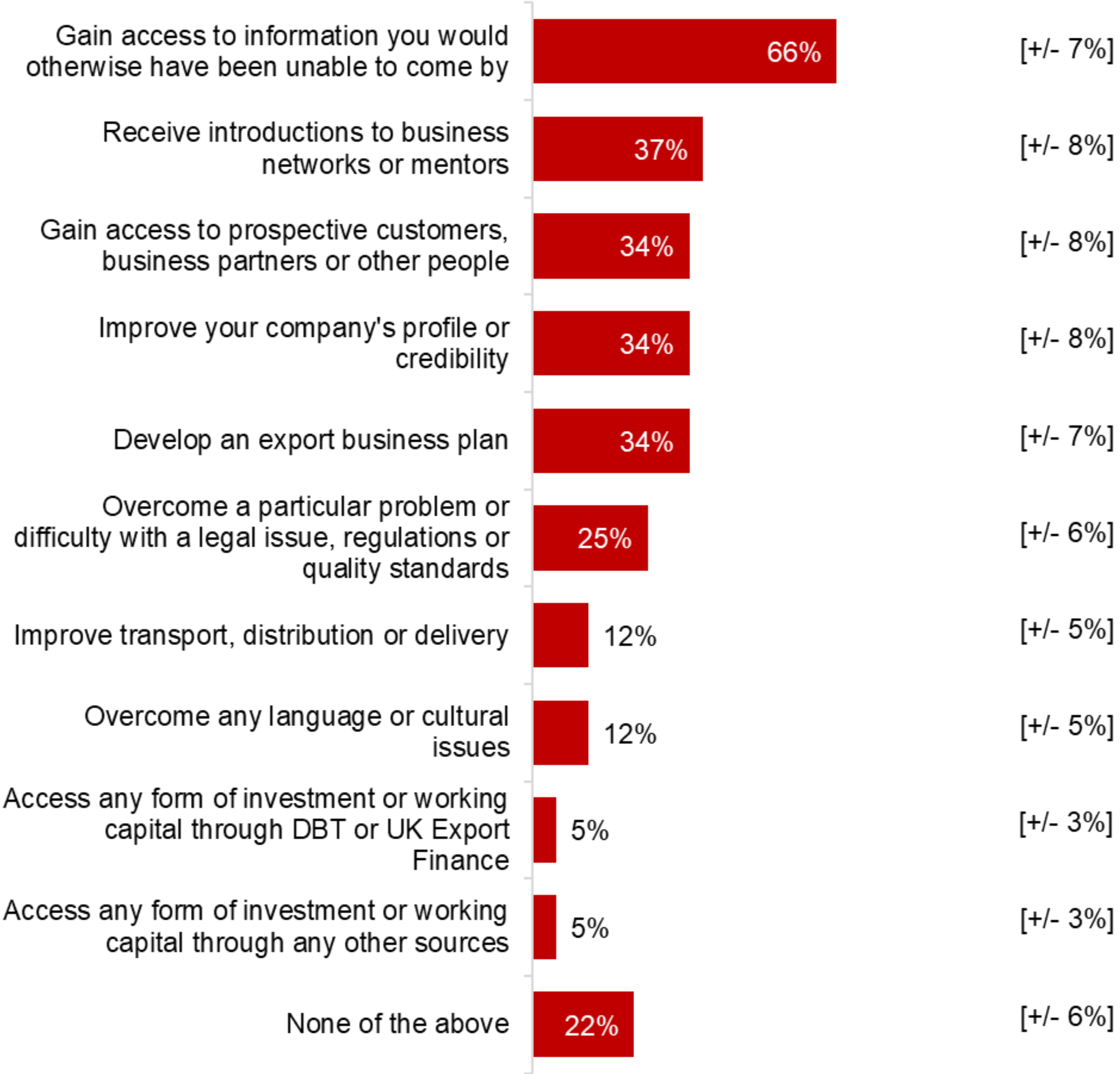
QImproveKnowledge: Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of the service? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used Export Academy not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Businesses were asked about other ways they had benefitted from using Export Academy in the year between dealing with the Export Academy and taking part in the RIS 2021/2022.[25] A detailed breakdown of responses is shown in Chart 4.3.15.

The top response was helping businesses to gain access to information that they would otherwise have been unable to come by (66%). One in five (22%) felt that using the Export Academy service had not helped them in any of the ways listed.

[25] Respondents were asked to select from a pre-coded list and had the option to provide an 'other' answer

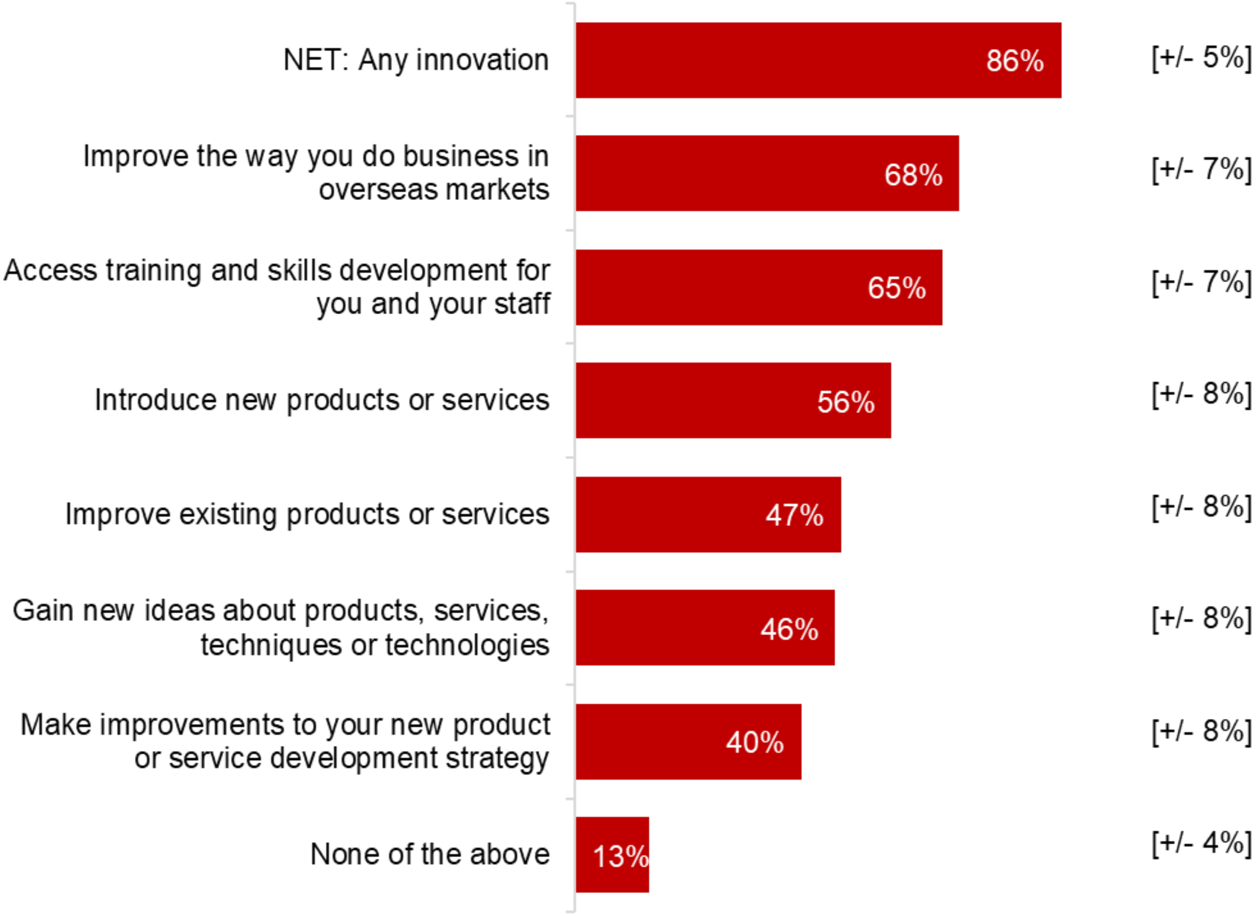
Chart 4.3.15 In what ways has the business felt it had benefited from DBT support – Export Academy



QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?
Base: All businesses that used Export Academy (n=251)

Businesses were asked whether using the Export Academy service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.3.16). Nearly nine in ten (86%) said that using the service helped them with innovation or development in some form. The most frequent responses were: to improve the way they do business overseas (68%), to access training and skills for themselves or their staff (65%), or to introduce new products or services (56%).

Chart 4.3.16 Whether the service has / is likely to help innovation and development – Export Academy



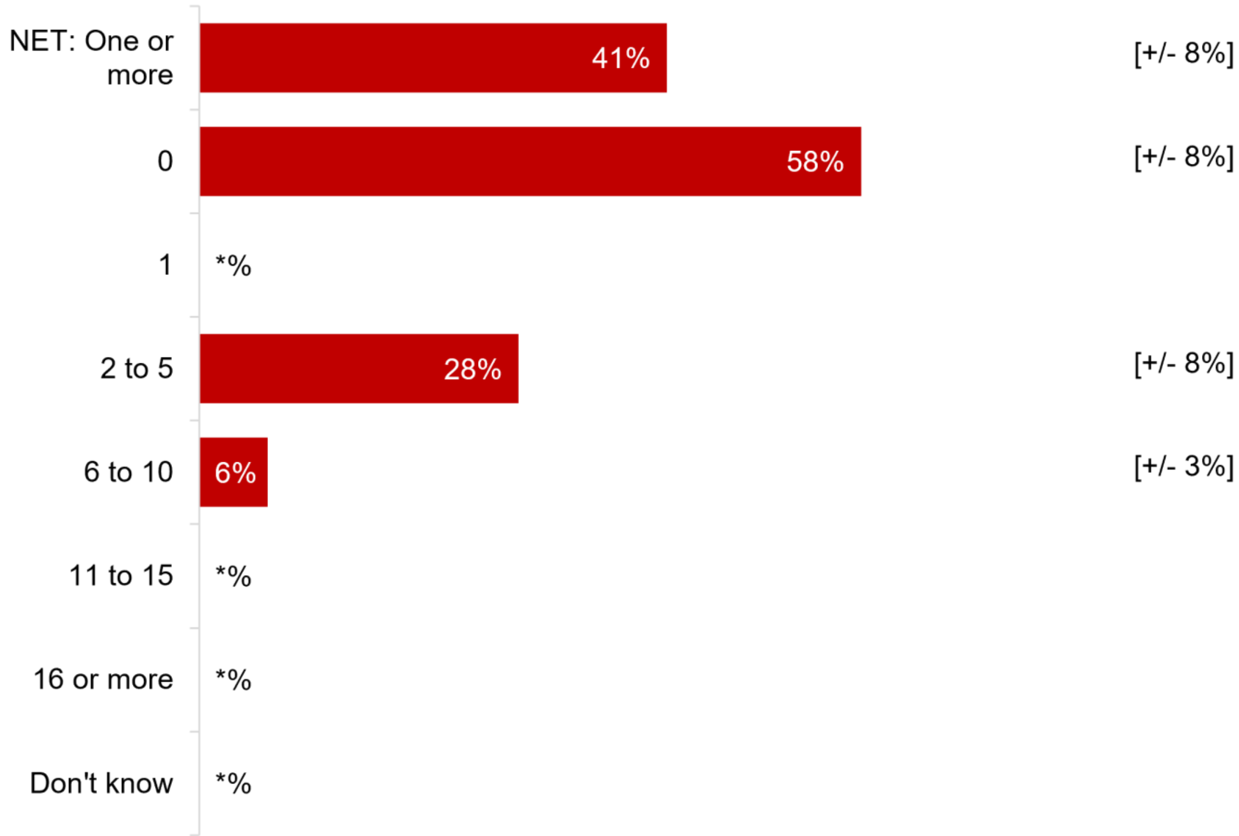
QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation?
Base: All businesses that used Export Academy (n=251)

International contacts

Businesses were asked how many overseas contacts they had made as a result of using Export Academy over the past year (Chart 4.3.17). Two-fifths (41%) of businesses made at least one new overseas contact in the year since using the Export Academy service, with over a quarter (28%) making between two and five new contacts. Around three-fifths (58%) of businesses reported that they had not made any new contacts as a result of using the Export Academy service.

The average number of contacts made was two.

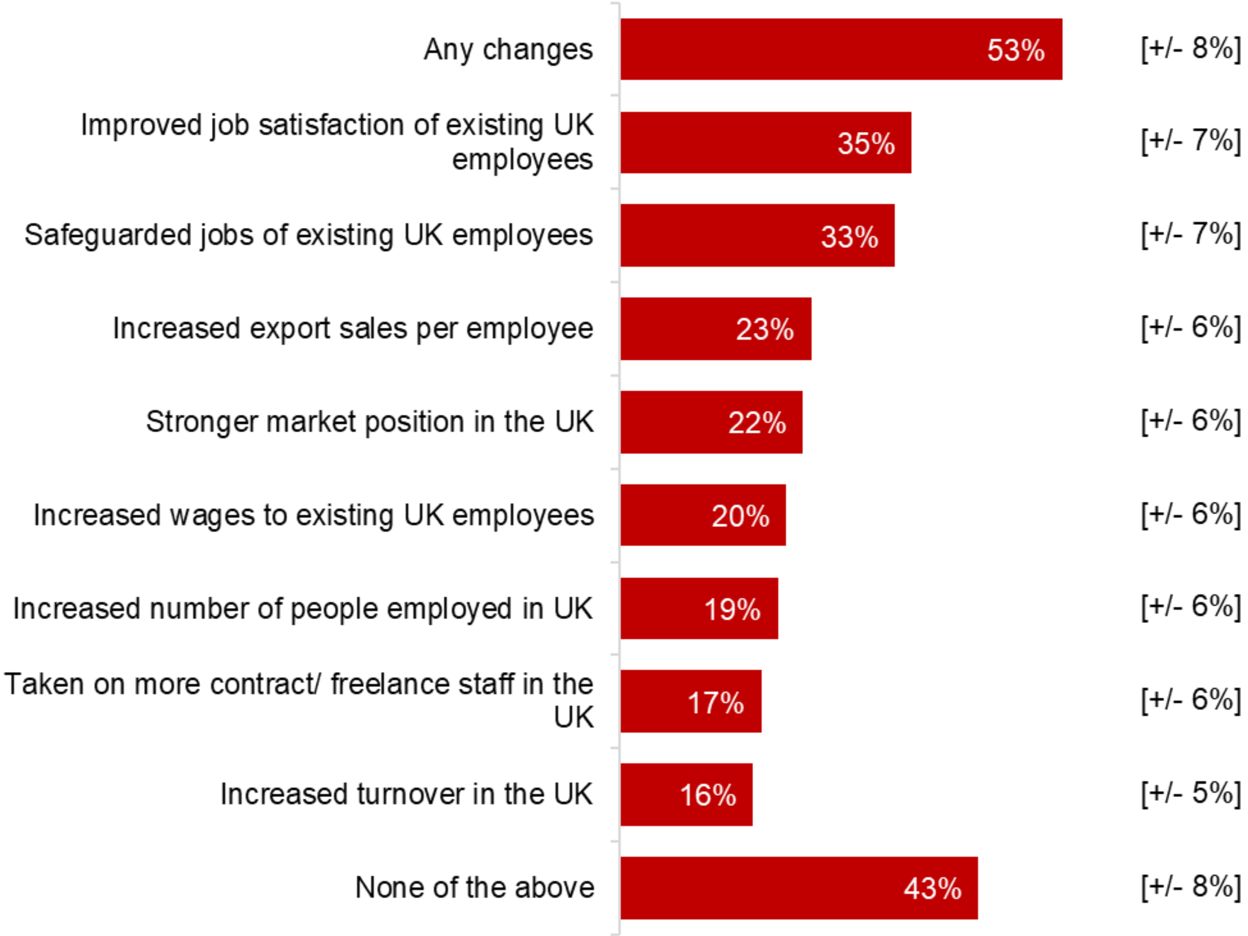
Chart 4.3.17 Number of new overseas contacts made in previous 12 months – Export Academy



QContactsMade: How many new overseas contacts, if any, did your business make as a result of the service in the past year?
*Base: All businesses that used Export Academy (n=251) *Redacted*

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Export Academy service (Chart 4.3.18). Around a third of businesses said they thought using the Export Academy service had, or would, improve job satisfaction among existing UK employees (35%) or safeguard jobs in the UK (33%).

Chart 4.3.18 Changes expected / seen in the UK business as a result of receiving the service – Export Academy

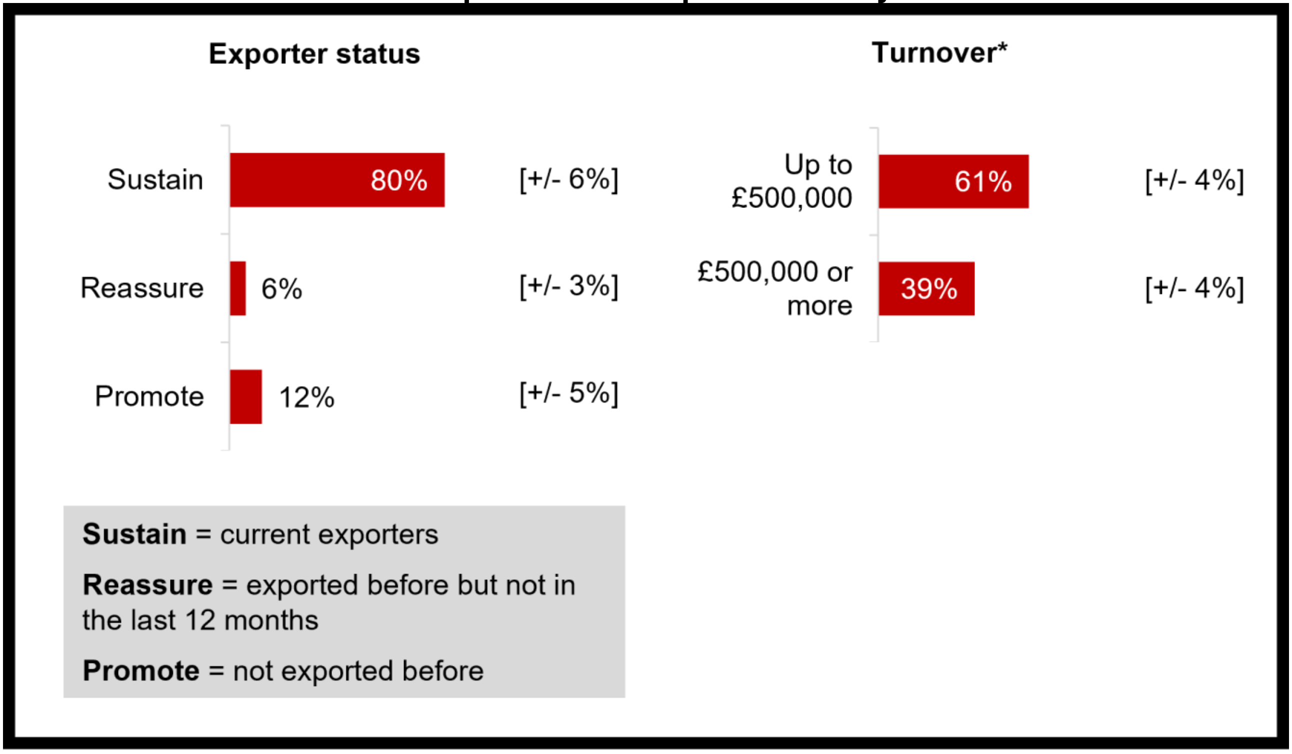


QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?
Base: All businesses that used Export Academy (n=251)

4.3.10 Profile of respondents

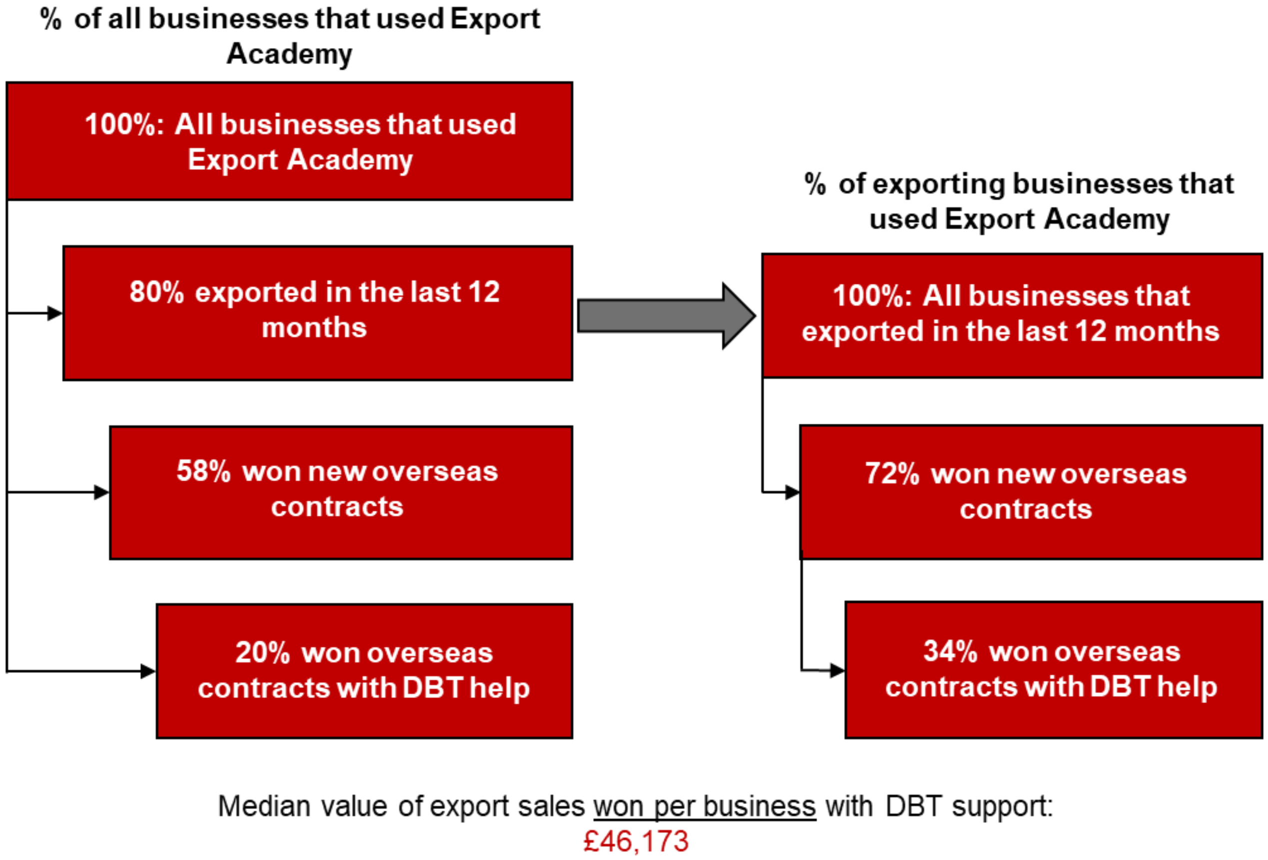
Looking at all businesses supported by Export Academy interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), four-fifths (80%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months (Chart 4.3.19).

Chart 4.3.19 Profile of RIS Respondents – Export Academy



*Base: All businesses that used Export Academy (n=251); *All businesses that used Export Academy not including 'Don't know' and 'Refused' responses (n=190)*

Chart 4.3.20 Summary of businesses supported by Export Academy



Base: All businesses that used Export Academy (n=251); All businesses that used Export Academy and that exported in the last 12 months (n=197); All businesses that used Export Academy and that won at least one overseas business contract in the last 12 months (n=138); All businesses that used Export Academy and that won at least one overseas business contract with the help of DBT (n=48, a small base size)

4.4 Webinars

Webinars are organised by International Trade Advisers, Overseas Posts, and DBT HQ teams. They are delivered by experts from both private and public sector organisations. The primary aim is to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting. As well as delivering Webinars similar to those offered in previous years, in 2020/21 additional Webinars were delivered on themes around reacting to the Covid-19 pandemic, and in preparation for the end of the implementation period of the United Kingdom's exit from the European Union. These additional Webinars were no longer delivered in 2021/22. This may therefore be a driver for year-on-year differences observed in this report.

This chapter explores the impact of using the Webinars service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 472 businesses that used Webinars between April 2021 and March 2022 and participated in both the Quality Survey (QS) and RIS.

4.4.1 Summary of reported impact as a result of Webinars support (from RIS)

Actions taken as a result of using Webinars

Following their use of the Webinars service, more than half of businesses reported that they had researched the paperwork and regulations needed to export (52%), while almost two-thirds (64%) had identified new export opportunities or made new contact. Among non-exporters, nearly four in ten (38%) had assessed the business' readiness to export after using Webinars.

Compared to the previous year, businesses were more likely to have taken some sort of action (88%, up from 83% in 2020/21), identified new export opportunities or made new contacts (64%, up from 43% in 2020/21), started or increased exporting (35%, up from 20% in 2020/21), made a deal that will yield exports (31%, up from 23% in 2020/21), commissioned bespoke research in a specific market (26%, up from 12% in 2020/21) and secured finance or funding to support export activity (11%, up from 8% in 2020/21). Businesses were less likely to have researched the paperwork and regulations needed to export (52%, down from 68% in 2020/21), and assessed their business' readiness to export (38%, down from 53% in 2020/21).

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was in line with the previous year (82% compared to 85% in 2020/21), with there being an increase from the QS 2021/22 (75%).

Impact on winning contracts

Of the businesses that exported, more than eight in ten (83%, up from 74% in 2020/21) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Webinars service. More than three-quarters reported that they made new overseas contracts (76%, up from 67% in 2020/21).

Overall, 62% of businesses won a new overseas contract, including 20% (up from 13% in 2020/21) saying this was with Webinars or DBT assistance. Among businesses that reported DBT support was important in helping them win these contracts, 4% said they would have been unlikely, to do this without DBT and 5% reported they would not have been able to do it without DBT (5%, up from 0% in 2020/21). There was a decrease in businesses that reported that they would have won these contracts without DBT (72%, down from 81% in 2020/21).

Impact on exposure and growth

Three quarters of businesses who won any new overseas business contracts with the help of DBT said Webinars assisted with expansion into a new market (74%) and expansion within an existing market (75%). Among all businesses, there was an increase in those that reported being exposed to or starting to do business in at least one new market (16%, up from 10% in 2020/21). Of these, Asia (42%) remained the most common new market for increased exposure or business.

Impact on contacts and networks

More than four in ten businesses (45%, up from 24% in 2020/21) made at least one new overseas contact after using Webinars.

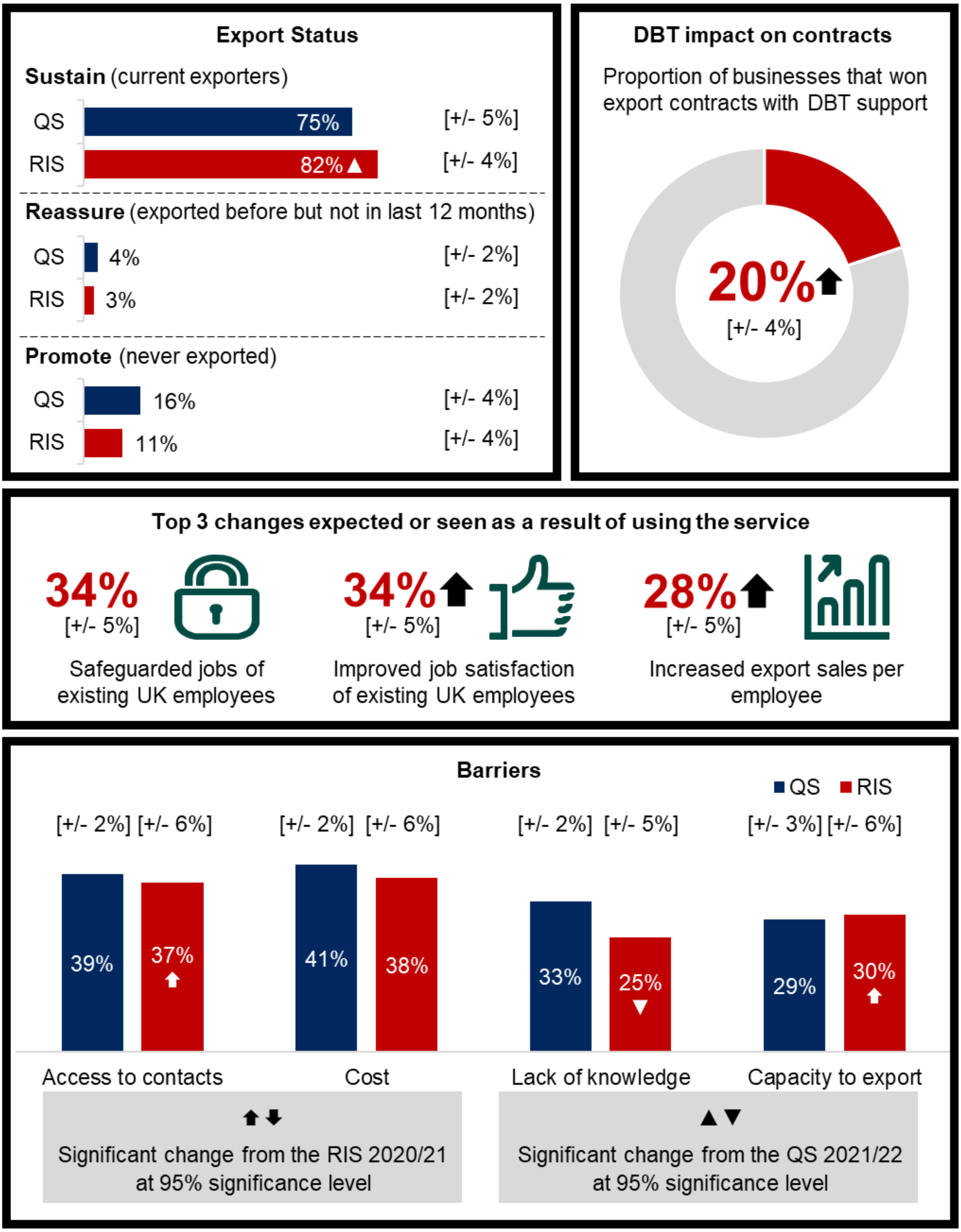
Impact on confidence

One quarter of businesses reported that using the Webinars service boosted their confidence to export in a new market (27%, up from 20% in 2020/21), and boosted their confidence to increase exports in an existing market (also 27%).

Other impact

Three in ten Webinars users reported that the Webinars service helped them to increase their knowledge of available export opportunities (29%, up from 20% in 2020/21), knowledge of competitors in overseas markets (13%, up from 5% in 2020/21) and price of their goods or services compared to those in overseas markets (9%, up from 5% in 2020/21).

Chart 4.4.1 Key indicators from the RIS (Webinars)



Base: All businesses that used Webinars and completed both surveys (n=472); Barriers - Access to contacts (QS n=461, RIS n=462), Cost (QS n=462, RIS n=457), Lack of knowledge (QS n=465, RIS n=465), Capacity to export (QS n=458, RIS n=458)

4.4.2 Satisfaction with Webinars (from Quality Survey)

In the QS 2021/22, nearly two in five businesses (37%) that used Webinars said they would recommend the service, while a quarter (25%) said they would not. This gave Webinars a Net Promoter Score (NPS) of +13. Around two-thirds (67%) reported they were satisfied with the Webinars service, and nearly six in ten (57%) said the overall service met their needs.

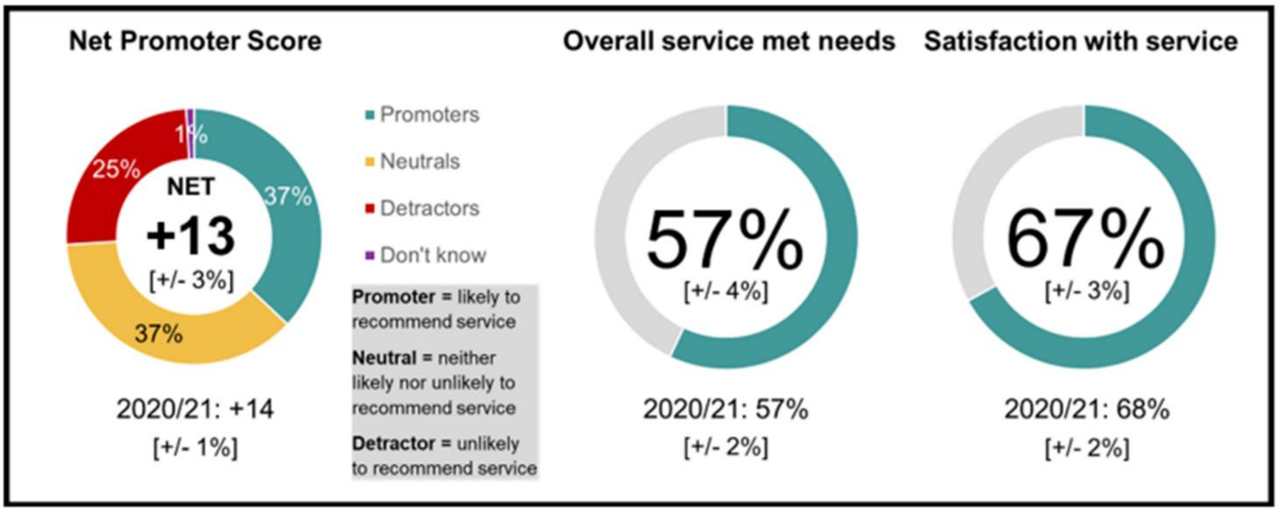
The NPS, the proportion of businesses that said the overall service met their needs as well as their satisfaction with the service, remained in line with the previous year.

Webinars users were most positive about staff knowledge (84%). Compared to the previous year, fewer businesses gave negative ratings about the clarity of the steps they needed to take, after using the service (4% compared to 7% in 2020/21).

As a result of using Webinars, 42% of businesses said they had researched the paperwork and regulations needed to export, a decrease from the previous year (42% compared to 57% in 2020/21). However, there was an increase in those saying they had identified new export opportunities or made new contacts (49%, up from 35% in 2020/21), started or increased exporting (19%, up from 14% in 2020/21) and commissioned bespoke research in a specific market (17%, up from 10% in 2020/21). More than four in ten (43%) that were not exporting at the time of using the service had assessed the business' readiness to export, and this was a decrease from the previous year (58% in 2020/21).

Webinars users were most likely to report that 'access to networks' was a barrier to exporting (37%, up from 29% in 2020/21), followed by 'cost' (36%) and 'lack of knowledge' (32%).

Chart 4.4.2 Net Promoter Score and Satisfaction with service (from Quality Survey) – Webinars



From the Quality Survey 2021-22:
Qlikrec: Based on your experiences of the service, how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before?
Base: All businesses that used Webinars (n=1,115).
Qqualinfo: How would you rate the extent to which the overall service received met your needs?
Base: All businesses that used Webinars (excluding 'not applicable' responses) (n=1,120).
Qsatis: Thinking about your overall experience of the service, how satisfied were you with this service?
Base: All businesses that used Webinars (excluding 'not applicable' responses) (n=1,147).

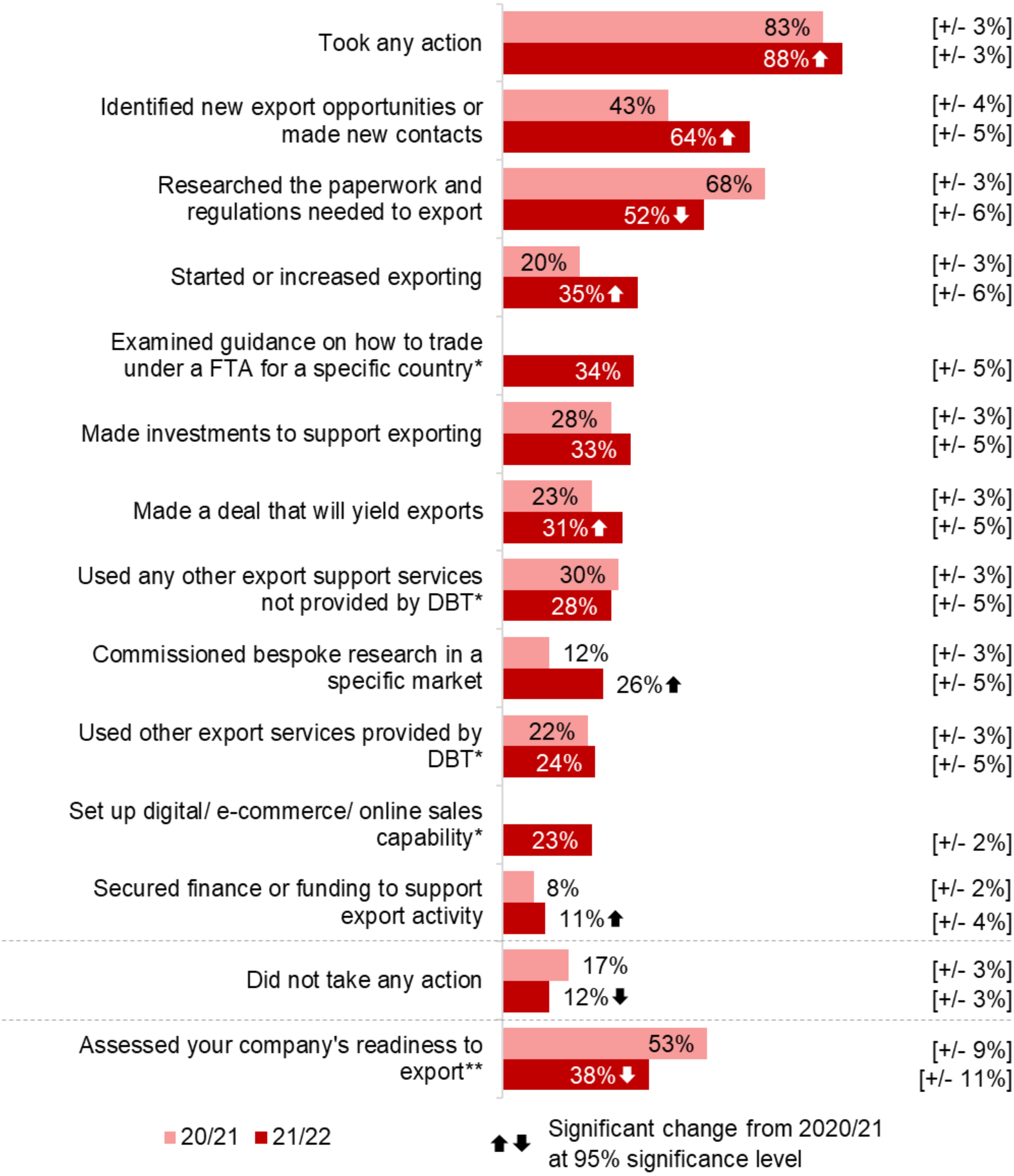
4.4.3 Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the Webinars service (Chart 4.4.3). Around half reported that they had researched the paperwork and regulations needed to export (52%), while 64% had identified new export opportunities or made new contacts. Around four in ten businesses (38%) that were not exporting had assessed the business' readiness to export.

Businesses with a turnover above £500,000 were more likely than those with turnover less than £500,000 to have made a deal that will yield exports (40% compared to 29% respectively), and to have used other export services provided by DBT (31% compared to 14% respectively). Similarly, micro businesses were less likely to have used other export services provided by DBT (20%) compared to small businesses (33%) and medium businesses (40%).

Compared to the previous year, businesses were more likely to have taken some sort of action (88%, up from 83% in 2020/21). This included identifying new export opportunities or making new contacts (64%, up from 43% in 2020/21), starting or increasing exporting (35%, up from 20% in 2020/21), making a deal that will yield exports (31%, up from 23% in 2020/21), and commissioning bespoke research in a specific market (26%, up from 12% in 2020/21). However, fewer businesses had researched the paperwork and regulations needed to export in 2021/22 (52%, down from 68% in 2020/21) or assessed their readiness to export (38%, down from 53% in 2020/21).

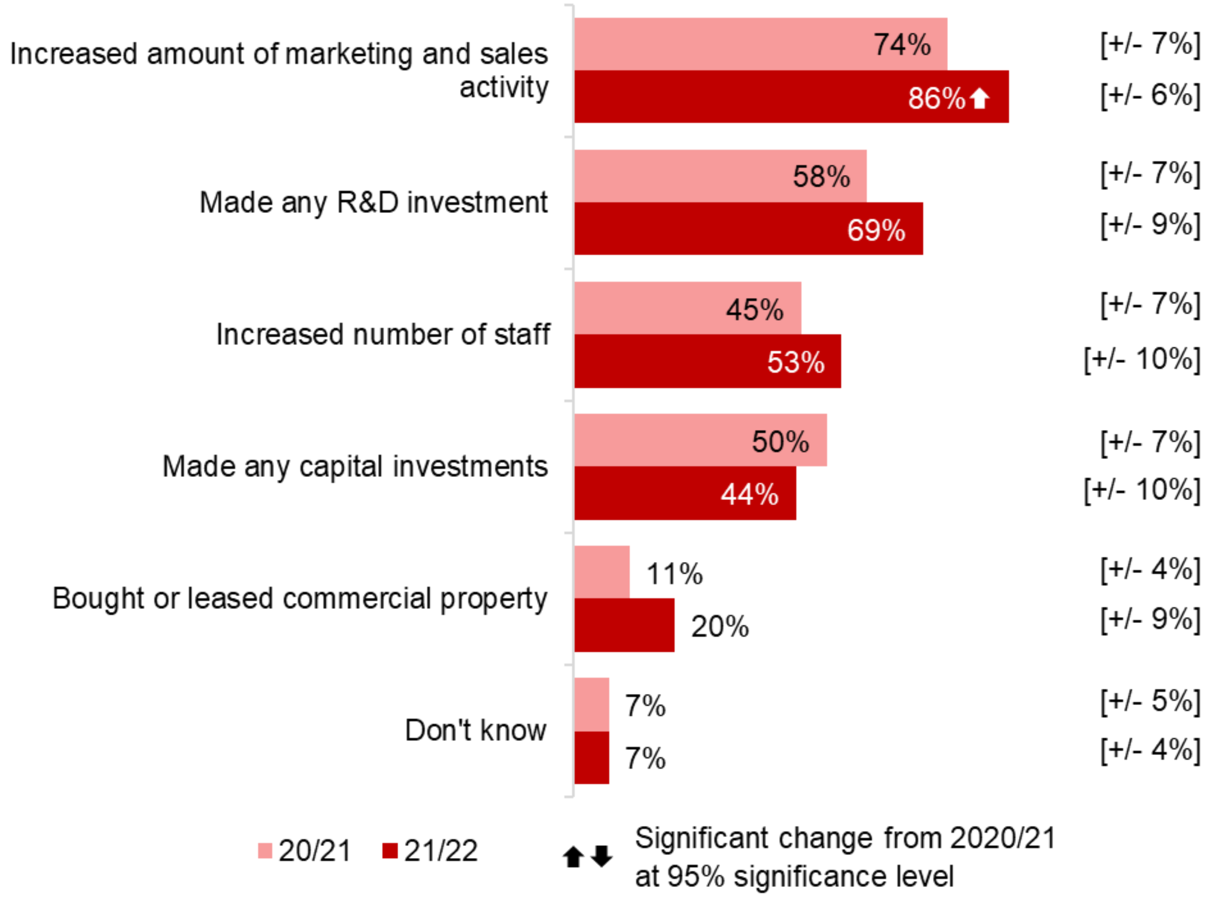
Chart 4.4.3 What the business has done as a result of receiving the service – Webinars



QResultService: What has your business done as a result of the service?
*Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21)); All businesses that used ITAs and were non-exporters (n=103 (2021/22), n=180 (2020/21)). * Code amended or added in 2021/22; ** Asked to non-exporters only.*

Businesses that had made an investment as a result of using the Webinars service were asked what investments they had made (142 respondents). As shown in Chart 4.4.4 the most common answer was an increase in marketing and sales activity (86%, up from 74% in 2020/21), followed by R&D investment (69%) and increased the number of staff (53%).

Chart 4.4.4 Type of investments made to support new or increased export opportunities following using – Webinars



QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities? Base: All businesses that used Webinars and made investments to support exporting as a result of using Webinars (n=142 (2021/22), n=257 (2020/21))

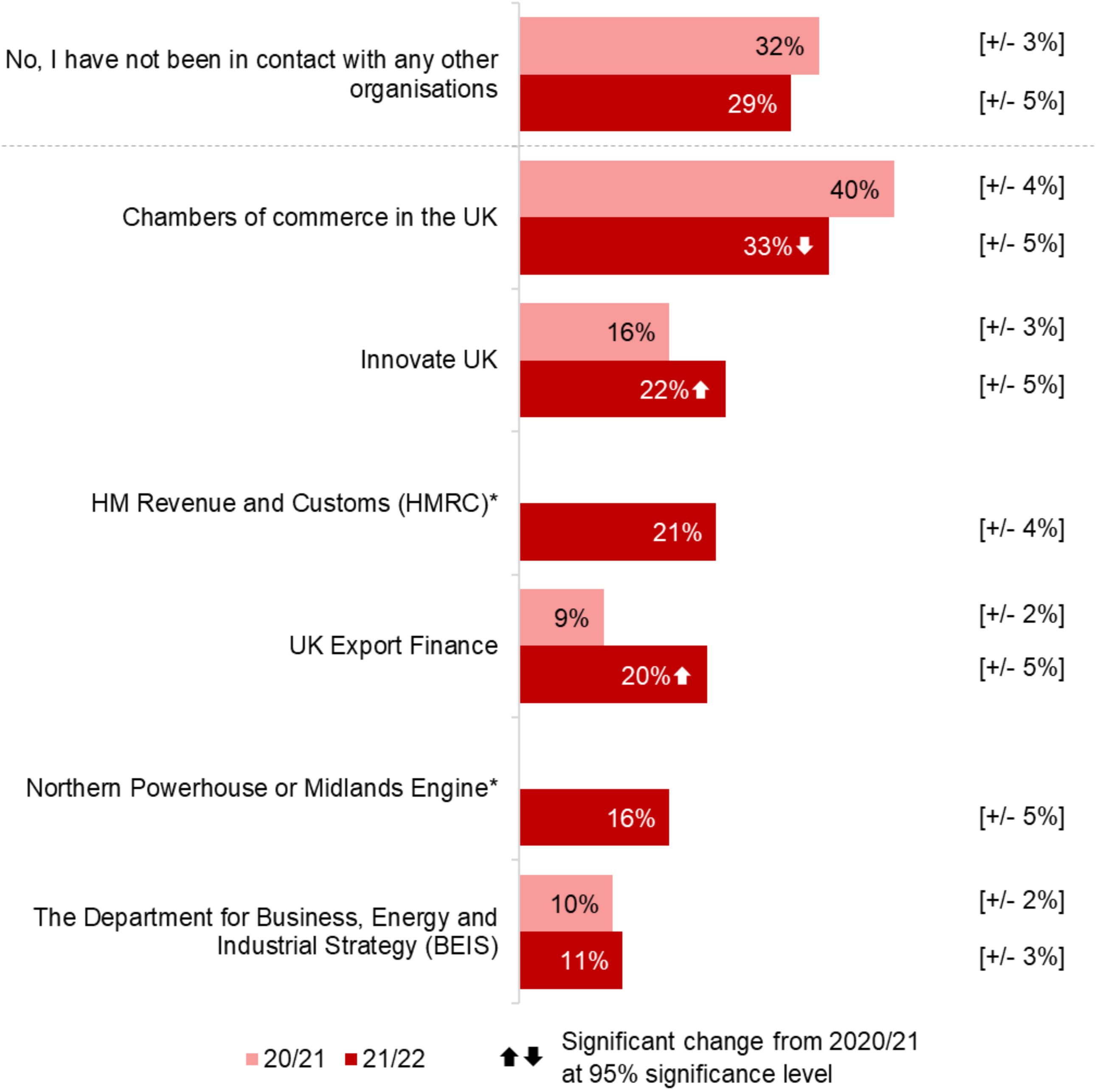
Businesses were asked what organisations they had been in contact with since using Webinars (Chart 4.4.5). One third of businesses had been in contact with the British Chambers of Commerce (33%), while more than two in ten had been in contact with Innovate UK (22%). Three in ten (29%) businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Small businesses were more likely to use Chambers of Commerce in the UK compared to micro businesses (43% compared to 27% of micro). Similarly, medium-sized businesses were more likely to use Chambers of Commerce in the UK compared to micro businesses (44% compared to 27% of micro).

In addition to the organisations shown in Chart 4.4.5, businesses were asked whether they had been in contact with any other organisations or sources of information (not shown in the chart). In comparison to the RIS 2020/21, businesses were less likely to have been in contact with the British Chambers of Commerce (33%, down from 40% in 2020/21), but more likely to have been contact with Innovate UK (22%, up from 16%) and UK Export

Finance (20%, up from 9%). Businesses were also less likely to have been in contact with business, professional or trade bodies (4%, down from 15% in 2020/21) online or on Google (3%, down from 18% in 2020/21), or in contact with friends/colleagues (3%, down from 17%), private consultants or advisors (2%, down from 9%) or Local Enterprise Partnerships (1%, down from 6%).

Chart 4.4.5 What organisations respondents have been in contact with since receiving the service – Webinars



QAnyContact: Since your business used the service 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 businesses that used Webinars (n=472 (2021/22), n=973 (2020/21)). Coded responses with 5% or more in 2021/22 are included. * Code amended or added in 2021/22*

4.4.4 Reported impact on exporting

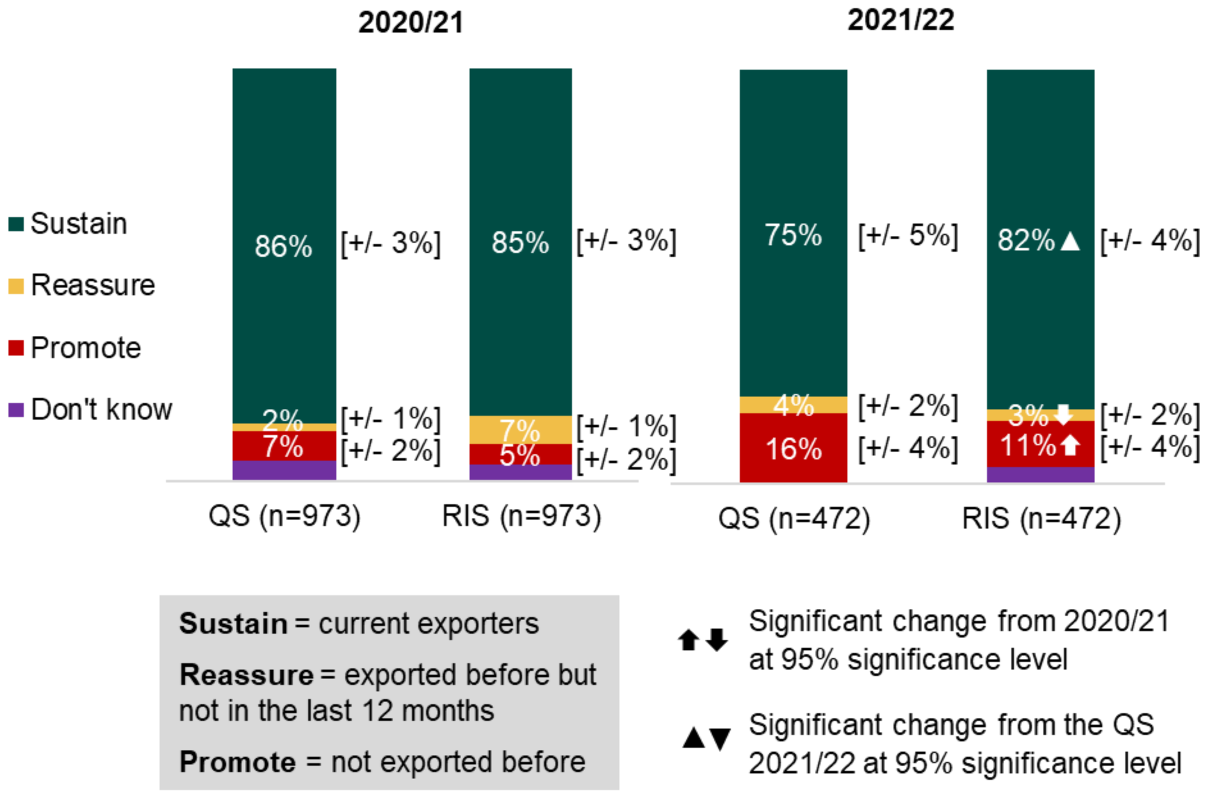
Businesses that used Webinars were asked about their export status, both at the time they accessed the Webinars service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the two surveys were analysed to see whether the export status of these businesses had changed over this period. DBT 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. Three quarters of businesses (75%) that used Webinars fell into this segment at the time of the service delivery (QS 2021/22). This increased to 82% in the RIS 12 months later.

- **Reassure:** refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Among Webinars users, 4% fell into this segment at the time of the service delivery (QS 2021/22), and 3% 12 months later. The proportion of businesses classified as 'reassure' in RIS 2021/22 (3%) was lower than in the previous year (7%).

- **Promote:** refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. Around one in six (16%) of those that used Webinars were in this segment at the time of the service delivery (QS 2021/22), and 11% in the RIS 12 months later. The proportion of businesses classified as 'promote' in RIS 2021/22 (11%) was higher than in the previous year (5%).

Chart 4.4.6 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Webinars



Source: Composite measure merging data from several variables.
Base: All businesses that used Webinars and completed both surveys (Quality Survey: n=472 (2021/22), n=973 (2020/21); RIS: n=472 (2021/22), n=973 (2020/21))

The export status of some businesses changed between the time of the service delivery and 12 months later in the RIS (see Table 4.4.1).

Table 4.4.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Webinars

Quality Survey Export status	RIS Export status	Percentage	Change since 2020/21
Sustain (n=366)	Sustain	**94%** [+/- 3%]	-
	Reassure	**c**	↓
	Promote	**c**	-
Reassure (n=c)	Sustain	**c**	↑
	Reassure	**c**	↓
	Promote	**c**	-
Promote (n=c)	Sustain	**c**	-
	Reassure	**c**	-
	Promote	**c**	-

c Cells have been suppressed to protect confidentiality
*Source: Composite measure merging data from several variables. Some movements are not logically possible and may represent respondent error. Data only includes respondents that provided details of their export status in both surveys. *Small base size*

Considering businesses that were in the Sustain segment at the time of the Quality Survey (366 businesses), 94% continued in Sustain.

4.4.5 Reported export contract achieved since receiving the service

Businesses that had exported in the previous 12 months were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the Webinars service (Chart 4.4.7). Businesses were asked to think about all contracts, not just those assisted by Webinars or DBT.

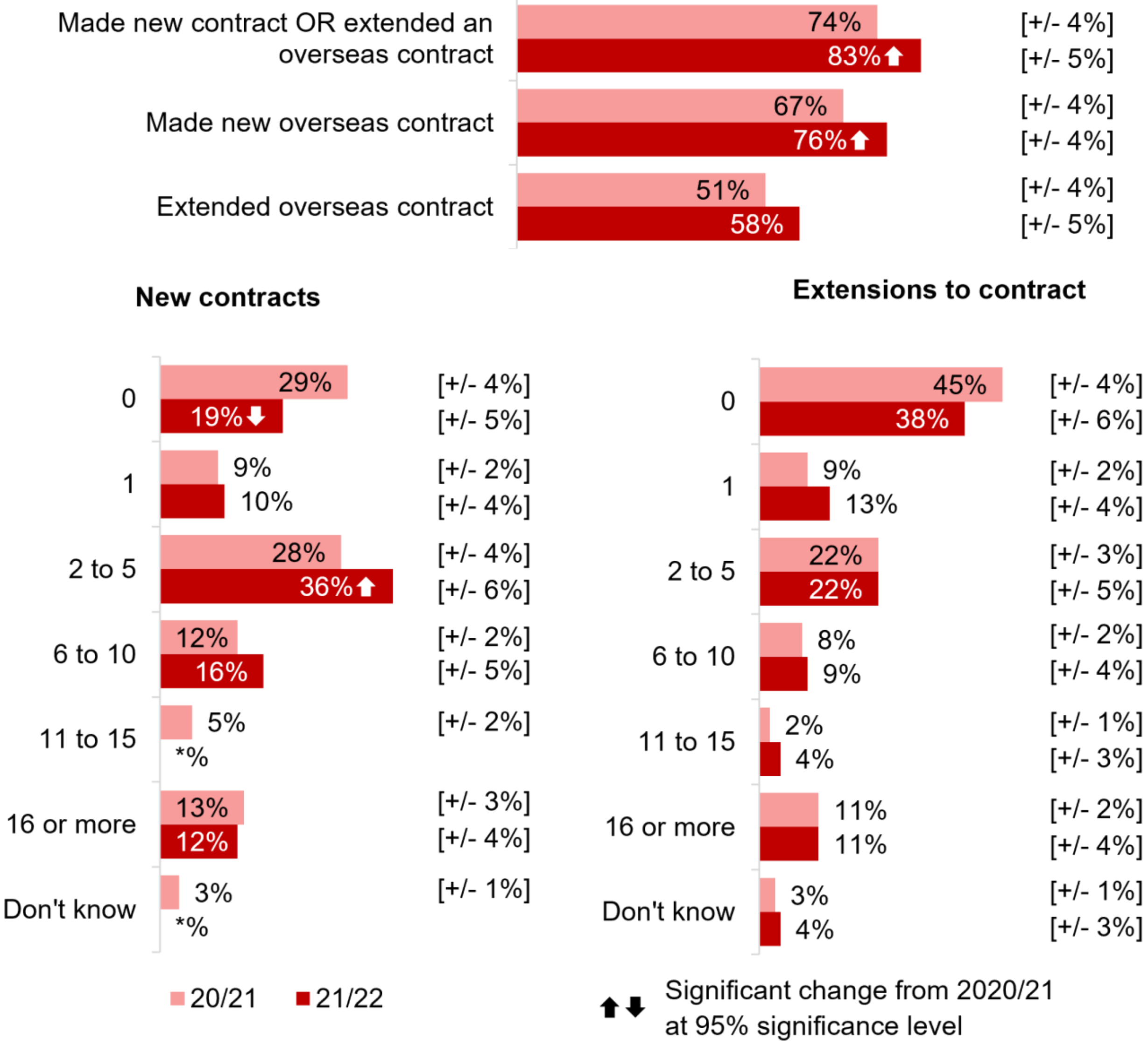
Of the 82% of businesses that had exported, over eight in ten (83%) reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service. This was an increase from the RIS 2020/21 (74%).

Three quarters of these exporting businesses had won new overseas business contracts in the year since they used the service (76%, up from 67% in 2020/21). Specifically, 10% had won one overseas contract, and nearly four in ten (36%, up from 28% in 2020/21) had won between two and five overseas contracts. One in eight businesses (12%) had won 16 or more overseas contracts (Chart 4.4.7). Fewer businesses reported winning no new contracts (19%, down from 29% in 2020/21). The median number of contracts won among exporting businesses that had used Webinars was two.

Around six in ten (58%) exporting businesses that used Webinars reported they had gained extensions to existing overseas business contracts in the year since they used the service. 13% extended one contract, and around one in five (22%) extended between two and five contracts. Around one in ten (11%) extended 16 or more existing overseas sales contracts. Almost one in ten (38%) of businesses had not extended any existing contracts (Chart 4.4.7). The median number of contracts extended (including those that did not extend any) was zero, the same as the previous year.

Businesses with turnover of up to £500,000 were more likely than those with higher turnover not to have won any new overseas business contracts (24% and 13% respectively).

Chart 4.4.7 Proportion of businesses that exported and reported they had made new overseas contracts and / or extended existing contracts, and number of contracts made in previous 12 months – Webinars



QNewcontract: How many new overseas business contracts for export sales did you win in the past year?
QExtendcontract: How many extensions to existing overseas business contracts for export sales did you win in the past year?
*Base: All businesses that used Webinars and were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=382 (2021/22), n=838 (2020/21)); All businesses that used Webinars and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=373 (2021/22), n=826 (2020/21)) * Redacted*

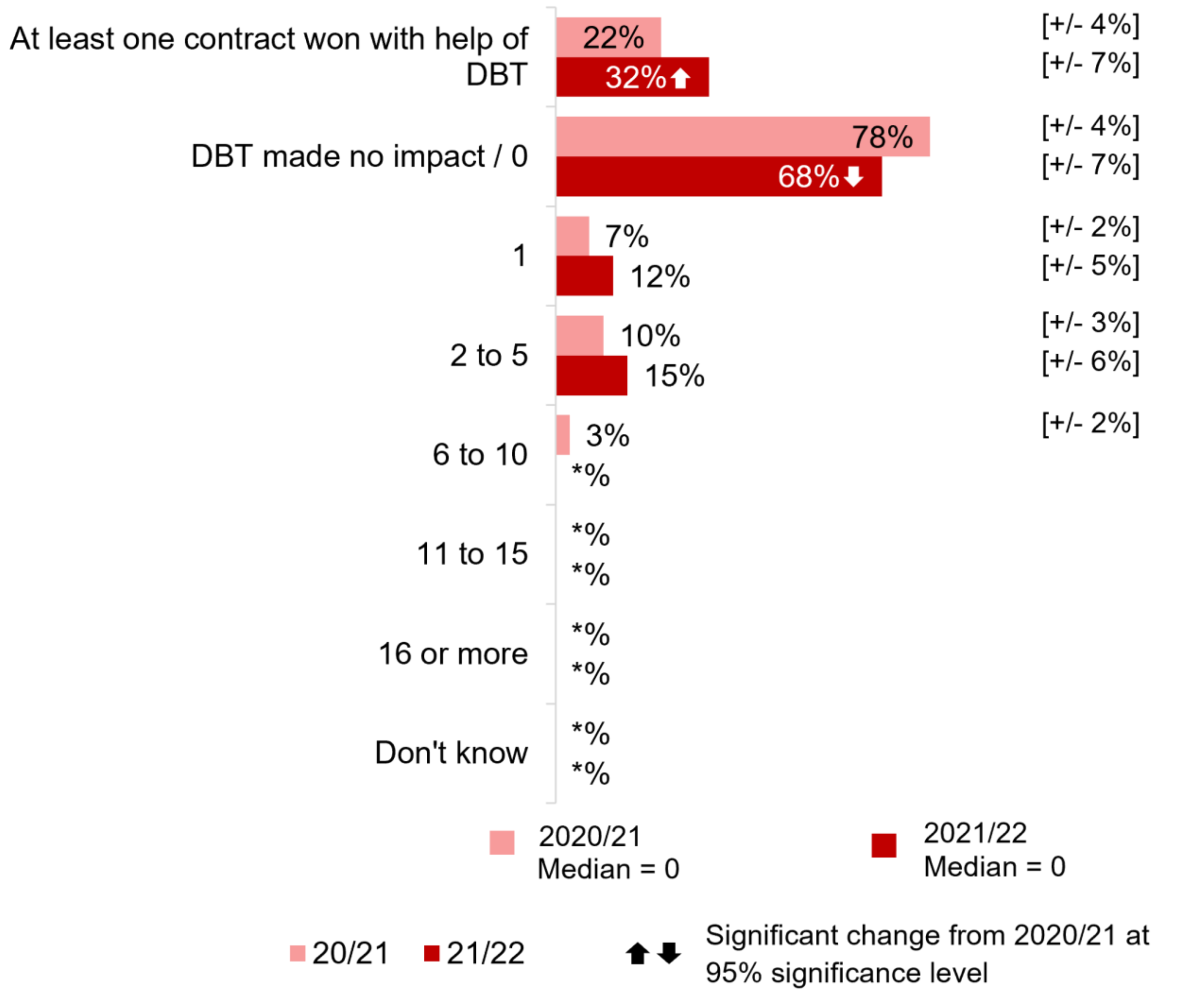
Reported additional contracts which were gained because of DBT support

Businesses that exported and that had won at least one new contract in the 12 months since the delivery of the Webinars service were asked whether they could estimate the number of contracts won with the assistance of Webinars or DBT. In total, 291 businesses (that is 62% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.4.8 below, a third of businesses (32%, up from 22% in 2020/21) said they had won at least one contract with the help of DBT, while two-thirds of businesses (68%, down from 78% in 2020/21) said they won no new overseas sales contracts with the help of DBT, or using DBT services made no impact.

Around one in eight (12%) had won one new overseas contract, and 15% had won between two and five contracts. The median number of contracts that DBT helped win was zero, for current exporters that used Webinars. This was in line with the previous year (RIS 2020/21).

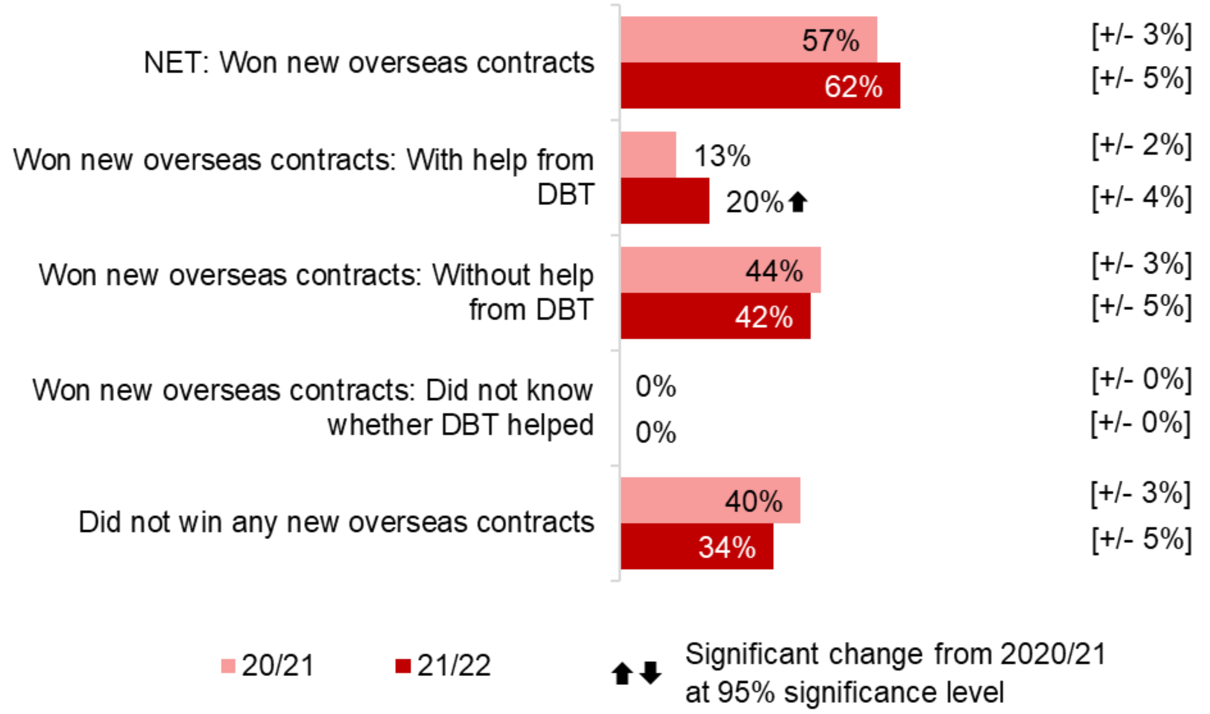
Chart 4.4.8 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – Webinars



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 DBT?
QContractNumber: How many new overseas contracts were won with help from DBT?
*Base: All businesses that used Webinars and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=291 (2021/22), n=556 (2020/21)). Median values include zero. * Redacted*

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.4.9). Among all businesses that had used Webinars, 62% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, 20% of Webinars users (up from 13% in 2020/21) said that they had won contracts with help from DBT, while 42% said they had won contracts without help from DBT.

Chart 4.4.9 Proportion of businesses reported to have won or not won new overseas contracts, and the proportion of businesses estimated to have won new overseas contracts with or without DBT support – Webinars



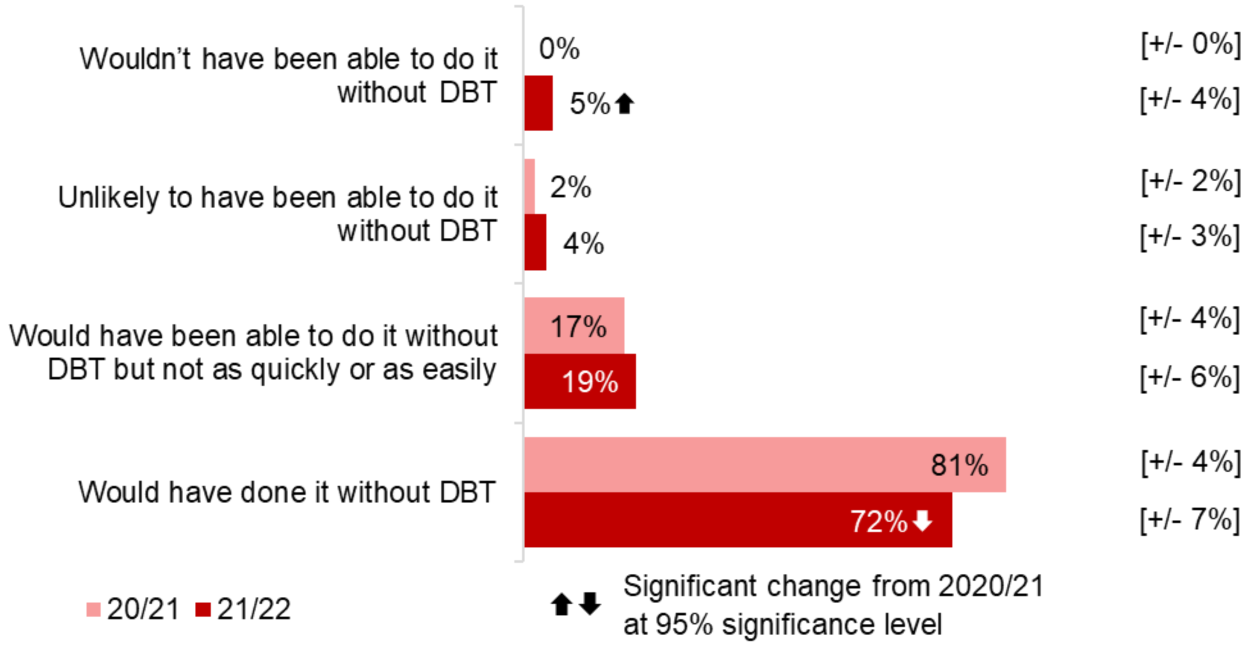
Source: Composite measure merging data from several variables.
Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21))

Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT's support in winning overseas contracts. This question was asked to businesses that reported they had won at least one overseas business contract with the help of DBT in the last 12 months, since the delivery of the Webinars service. Exporting businesses who said that DBT made no impact or did not help them win any new contracts were not asked this question. However, they have been included under 'would have done it without DBT' to better understand the level of support that the Webinars service provided.

Around three in ten of these businesses (28%) reported that DBT support was important in helping them win these contracts to some extent. This includes 5% that said they would not have been able to do it without DBT, 4% that thought it was unlikely they could have done it without DBT, and 19% that thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.4.10). The remaining 72% (down from 81% in 2020/21) thought they would have been able to achieve the same outcome without DBT support.

Chart 4.4.10 How important DBT's help was in winning overseas contracts – Webinars



QContractHelp: How important was DBT's help in winning these overseas contracts?
Base: All businesses that used Webinars and won any new overseas contracts in the past year (n=291 (2021/22), n=556 (2020/21))

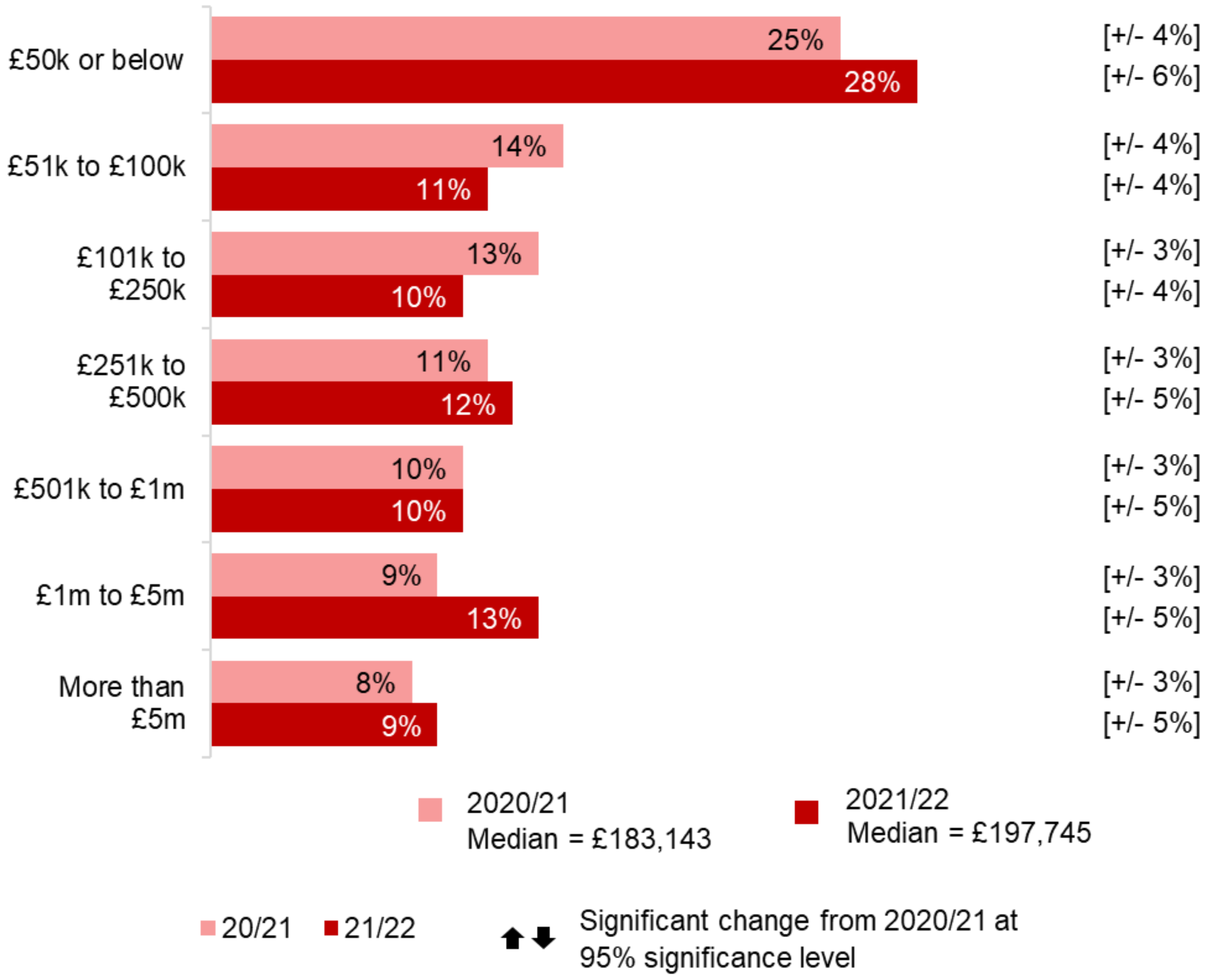
4.4.6 Reported vale of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 62% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts, in total (Chart 4.4.11). The median value of the export sales of all new overseas contracts for these businesses was £197,745 (compared to £183,143 in RIS 2020/21).[26] Nearly three in ten (28%) had won contracts with an export sales value of £50,000 or below. One in six (16%) said that the export sales value of the new overseas contracts won was more than £1 million. These results are in line with the previous year.

[26] Values are not adjusted for inflation when comparing to 2020/21.

Chart 4.4.11 Value of all new overseas contracts made in previous 12 months – Webinars



QContractValue: What is the value of all these new overseas business contracts for export sales?
Base: All businesses that used Webinars and won any new overseas business contracts (n=291 (2021/22), n=556 (2020/21))

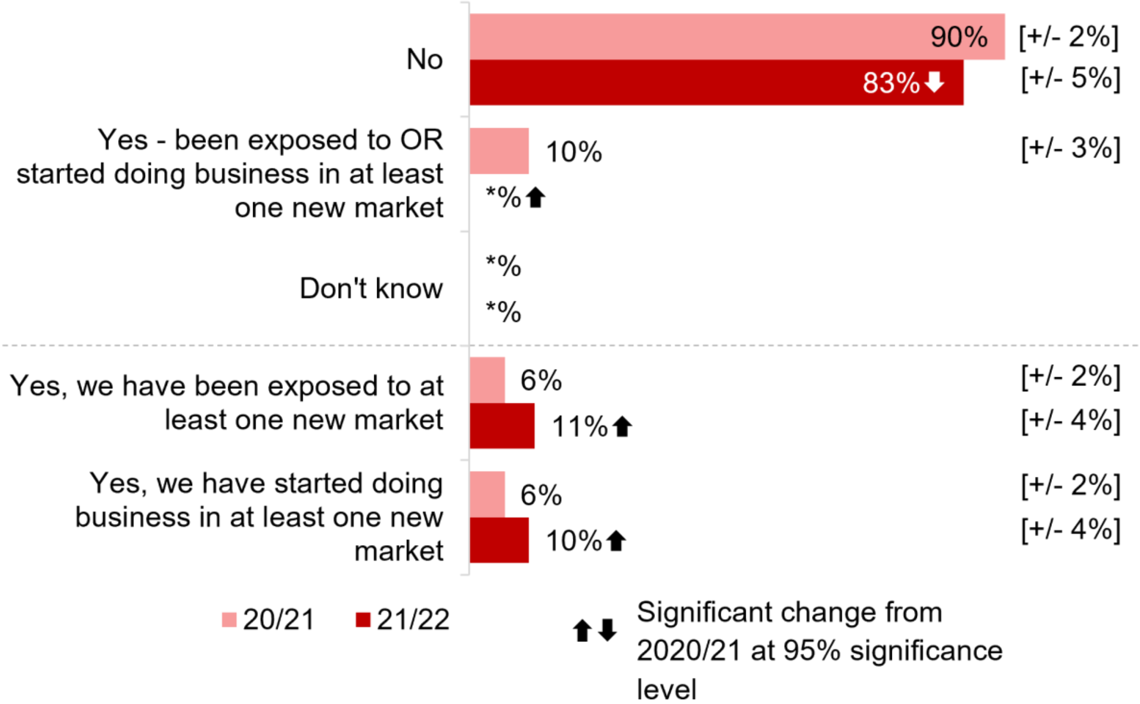
Reported additional value of DBT support

This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the Webinars service, they were asked to think about the impact from all of their interactions with DBT. The analysis in this section measures the additional contribution that DBT made towards businesses outcomes, including the number and value of new overseas contracts made.

All businesses that used Webinars were asked whether they had increased their exposure or started doing business in any new markets because of using the Webinars service (Chart 4.4.12). One in ten (11%) businesses said they had been exposed to at least one new market (11%) and had started doing business in at least one new market (10%) as a result of using the Webinars service.

Compared to the RIS 2020/21, businesses were more likely to say they had either been exposed to or had started doing business in at least one new market. Similarly, businesses were less likely to say that that they not had increased exposure or started doing business in a new overseas market in the past year (83%, down from 90% in 2020/21).

Chart 4.4.12 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?
*Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21)) *Redacted*

4.4.7 Barriers to exporting

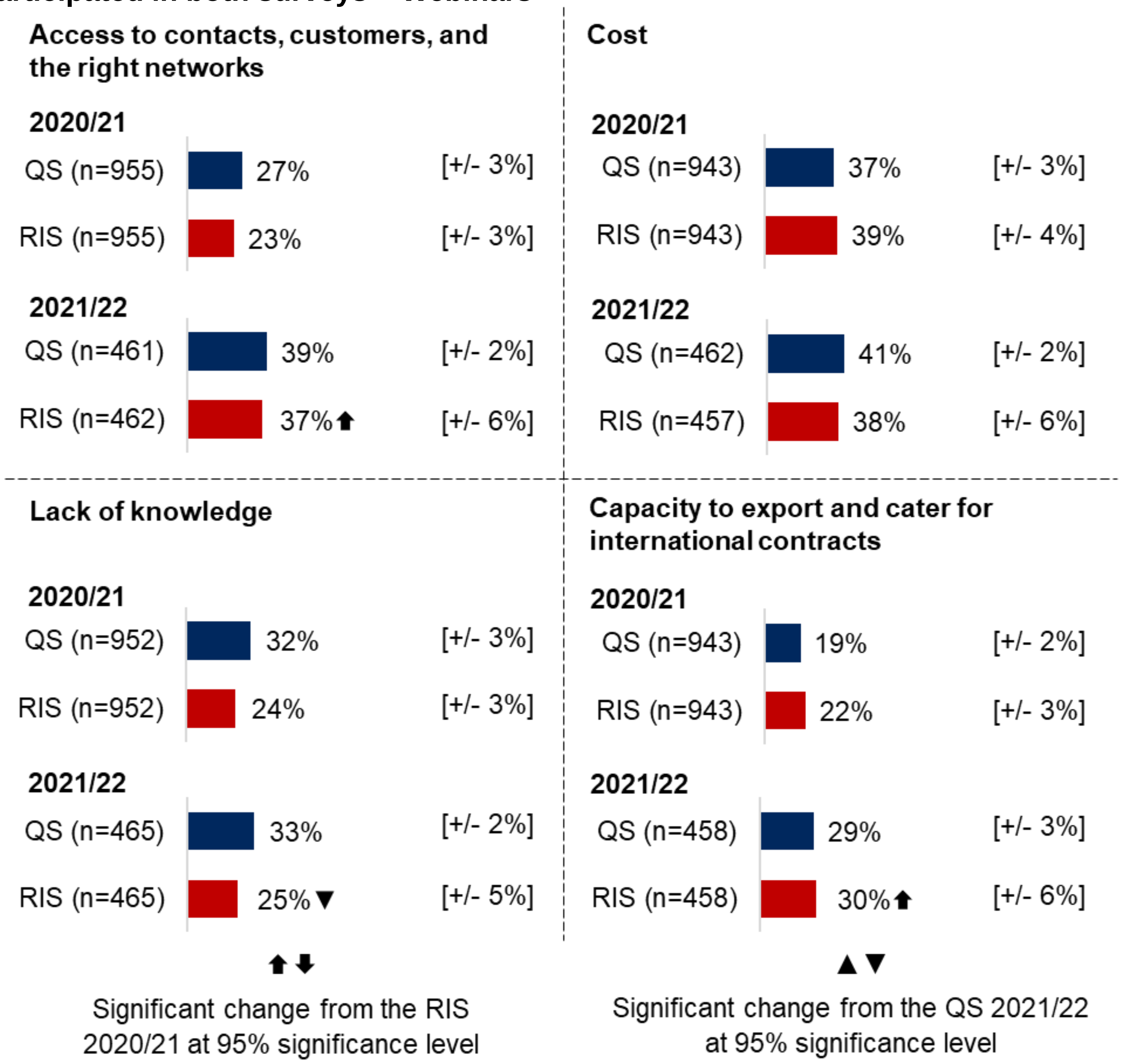
As shown in Chart 4.4.13, businesses were asked in both the QS and RIS about **four potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all).

The top barrier in RIS 2021/22 was ‘cost’ (38%), followed by ‘access to contacts’ (37%). Businesses with a turnover of less than £500,000 were more likely to consider ‘access to contacts’ as a barrier than businesses with higher turnover (45% compared to 27% respectively).

Compared to these businesses’ responses in the QS 2021/22, businesses were less likely to report ‘lack of knowledge’ as a barrier (25%, down from 33% in QS 2021/22).

Compared to the previous year (RIS 2020/21), businesses were more likely to report ‘access to contacts’ (37%, up from 23%) and ‘capacity to export and cater for international contracts’ (30%, up from 22%) as barriers.

Chart 4.4.13 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Webinars



QBarrier: On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier was the following for your business when it comes to exporting? A barrier is defined as a score between 7 and 10.
Base: All businesses that used Webinars not including those who gave a 'not applicable' answer.

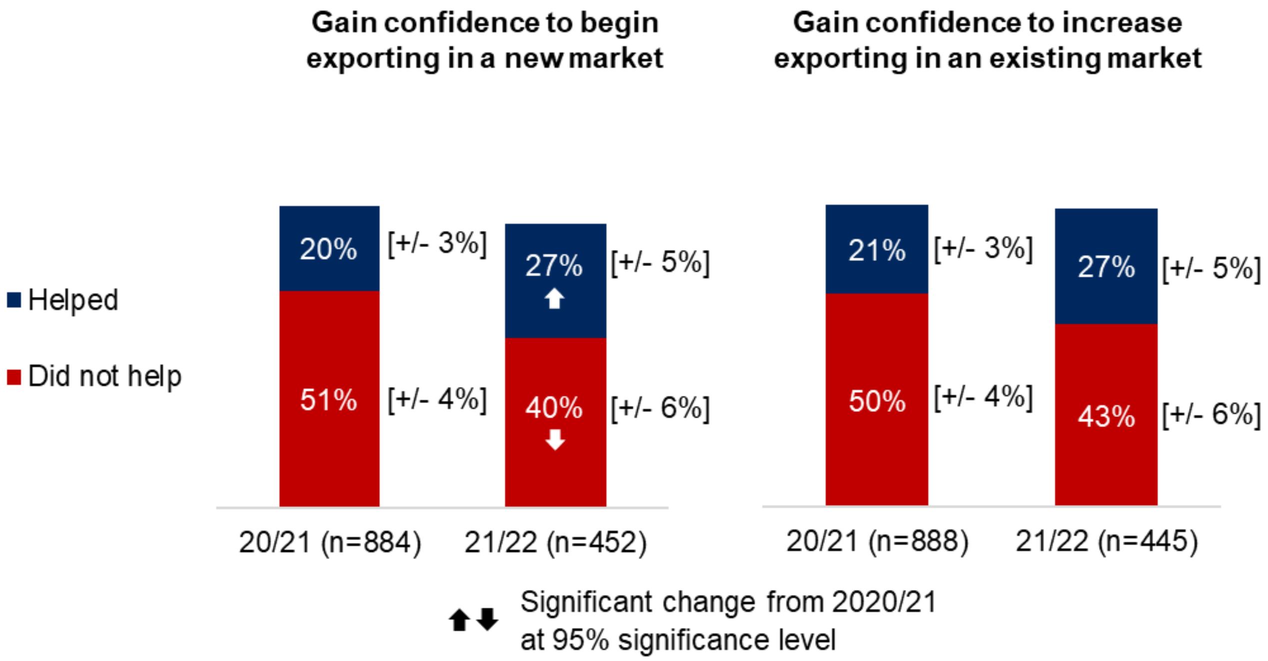
4.4.8 Wider benefits of the service

Businesses were asked to think about the extent to which using the Webinars service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market (Chart 4.4.14). One quarter reported that using the Webinars service had given them confidence to begin exporting in a new market (27%), and confidence to increase exporting in an existing market (27%). At the same time, around four in ten businesses said Webinars did not help in giving them confidence to begin exporting in a new market (40%) or to increase exporting in an existing market (43%).

Compared to the previous year, more businesses reported that using the Webinars service helped them to gain confidence in exporting in a new market (27%, up from 20% in

2020/21), with fewer businesses saying Webinars had not helped (40%, down from 51% in 2020/21).

Chart 4.4.14 To what extent using the Webinars service helped to build confidence to export – 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 the service help you to …? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used Webinars not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

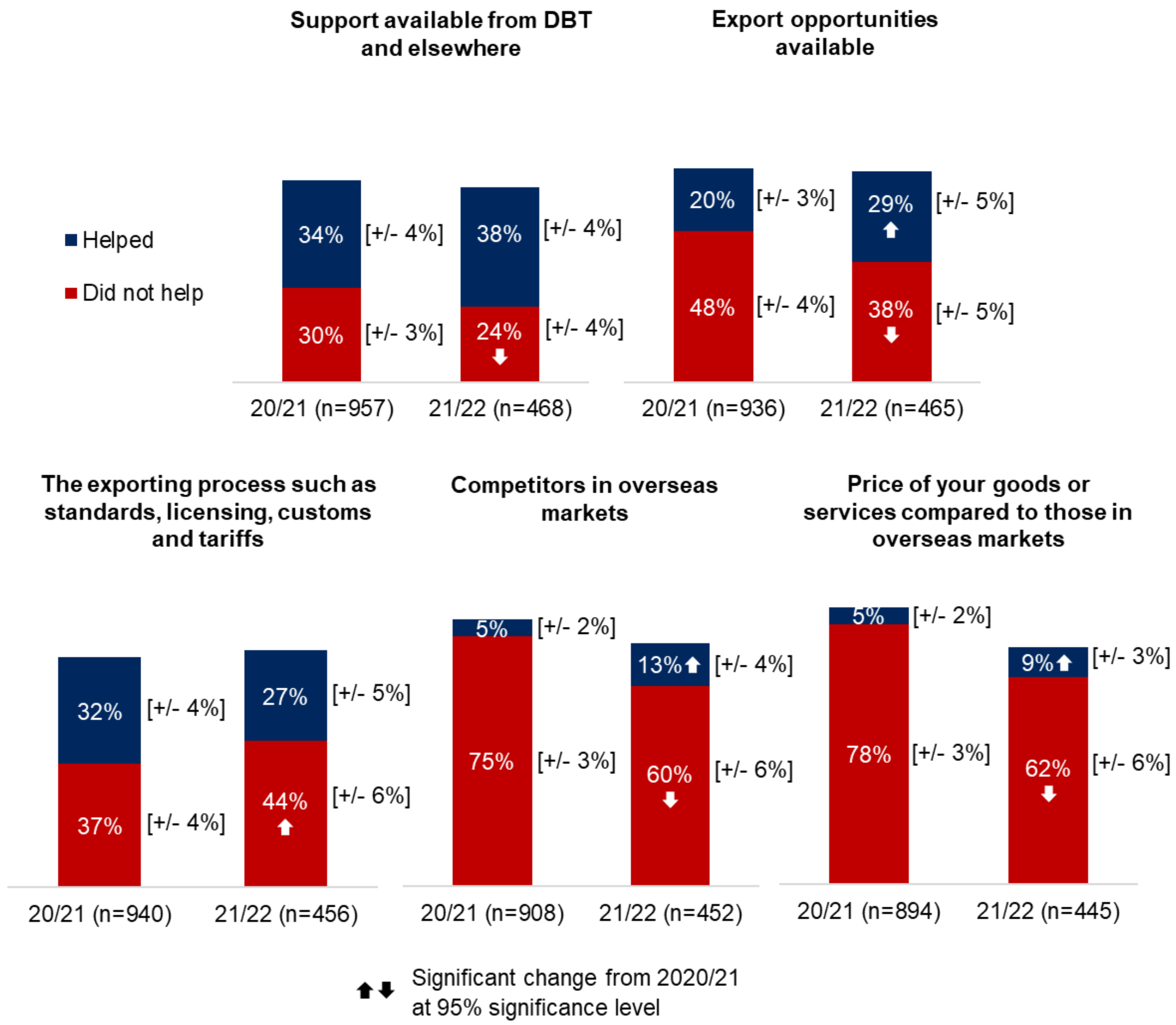
Businesses were asked to think about the extent to which the service had **helped them improve their knowledge.** Chart 4.4.15 below shows how businesses rated the impact of using the Webinars service on their knowledge.

On balance, more businesses reported that using the Webinars service was **helpful for increasing their knowledge of support available to them (from DBT and elsewhere).** Four in ten (38%) said the service helped to do this, and a quarter (24%) said it did not help them do this.

Webinars were more likely to be seen as helpful compared to the previous year for increasing knowledge across most measures. Businesses were more likely to say the service helped improve their knowledge of **export opportunities available** (29%, up from 20% in 2020/21), **competitors in overseas markets** (13%, up from 5%) and the **price of their goods and services compared to those in overseas markets** (9%, up from 5%). Similarly, businesses were less likely to say Webinars did not help them improve their knowledge of the **support available from DBT and elsewhere** (24%, down from 30% in 2020/21).

The only exception was knowledge of the **exporting process**, where businesses that used Webinars were more likely to say the service had not helped them improve their knowledge compared to the previous year (44%, up from 37% in 2020/21).

Chart 4.4.15 To what extent the business felt that their knowledge has improved 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 the service? Helped (7-10), Neutral (4-6), Did not help (0-3).
Base: All businesses that used Webinars not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

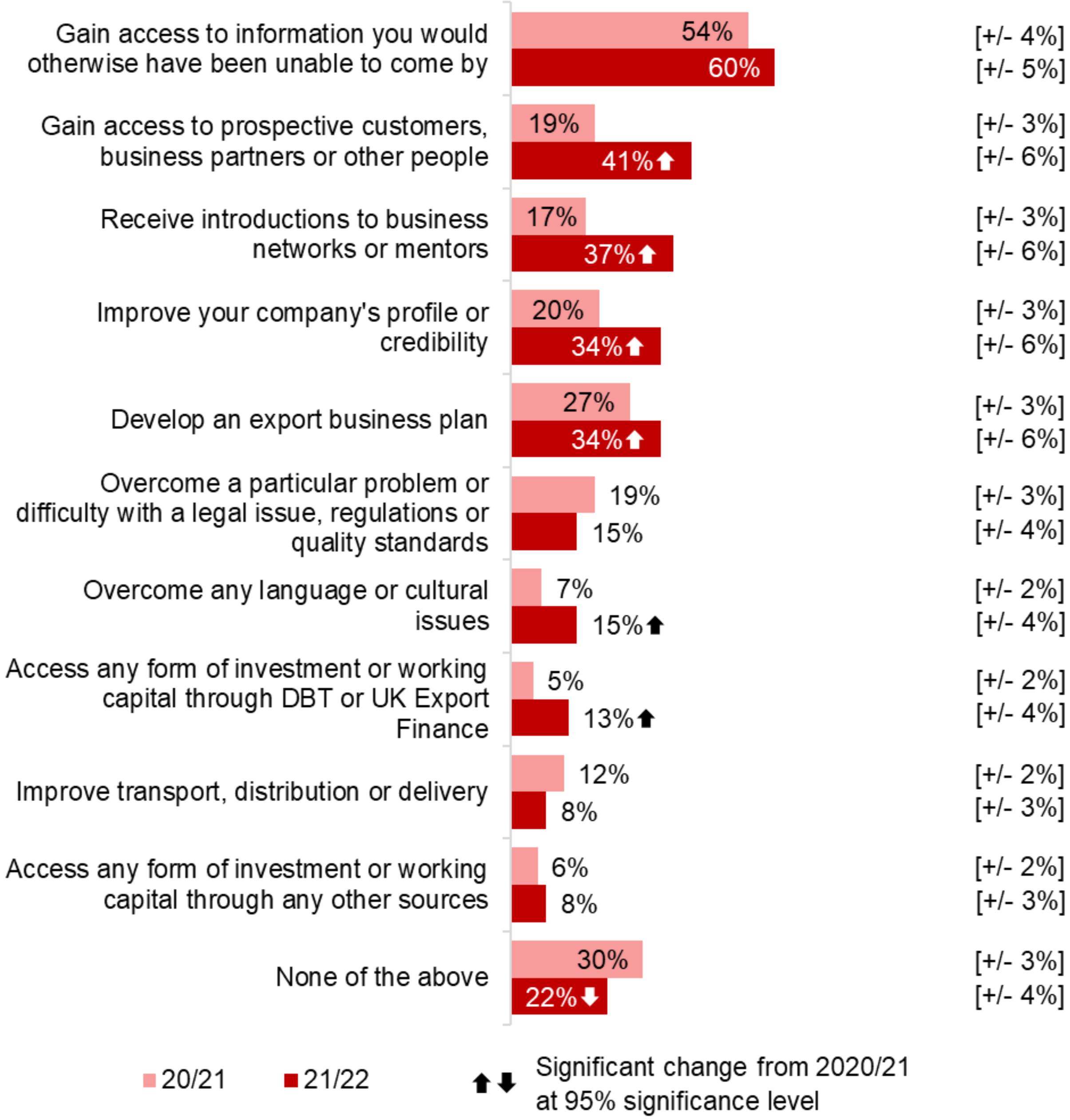
Businesses were asked about other ways they had benefitted from using Webinars in the year between using Webinars and taking part in the RIS. A detailed breakdown of responses is shown in Chart 4.4.16.

The top responses was helping businesses to gain access to information that they would otherwise have been unable to come by (60%).

Compared to the previous year, businesses were more likely to say they had benefitted from DBT support across a range of measures: gaining access to prospective customers, business partners or other people (41%, up from 19% in 2020/21), receiving introductions to business networks or mentors (37%, up from 17% in 2020/21), improving their company's profile or credibility (34%, up from 20% in 2020/21), developing an export business plan (34%, up from 27% in 2020/21), overcoming any language or cultural issues (15%, up from 7% in 2020/21), and accessing any form of investment or working capital through DBT or UK Export Finance (13%, up from 5% in 2020/21).

Around one fifth (22%, down from 30% in 2020/21) felt that using the Webinars service had not helped them in any of the ways listed.

Chart 4.4.16 In what ways has the business felt it had benefited from DBT support – Webinars



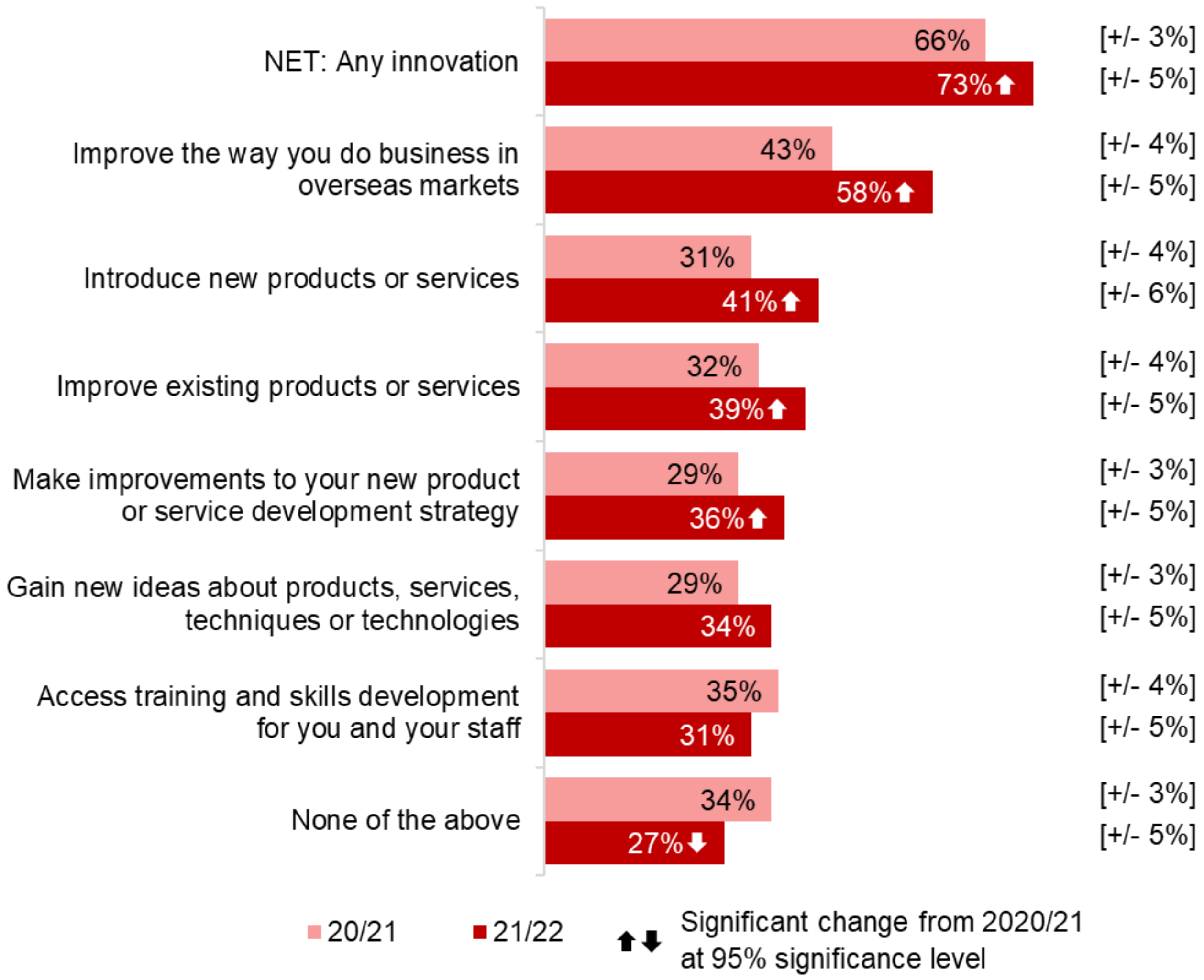
QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?
Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21))

Businesses were asked whether using the Webinars service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.4.17). Nearly three quarters (73%, up from 66% in 2020/21) said that using the service helped them, or would

help them, with innovation or development in some form. The most frequent responses were to improve the way they do business overseas (58%) or to introduce new products or services (41%).
Businesses with a turnover of less than £500,000 were more likely than those with a turnover of £500,000 or more to report Webinars helped or expected to help access training and skills development for them and their staff (39% compared to 25%).

Compared to the RIS 2020/21, businesses were more likely to say that using the service had improved the way they do business in overseas markets (58%, up from 43% in 2020/21), introduced new products or services (41%, up from 31% in 2020/21), led to improvements to existing products or services (39%, up from 32% in 2020/21) and to their new product or service development strategy (36%, up from 29% in 2020/21). Businesses were less likely to say the service did not help or expect it to help with development and/or innovation (27%, down from 34% in 2020/21).

Chart 4.4.17 Whether the service has / is likely to help innovation and development – Webinars



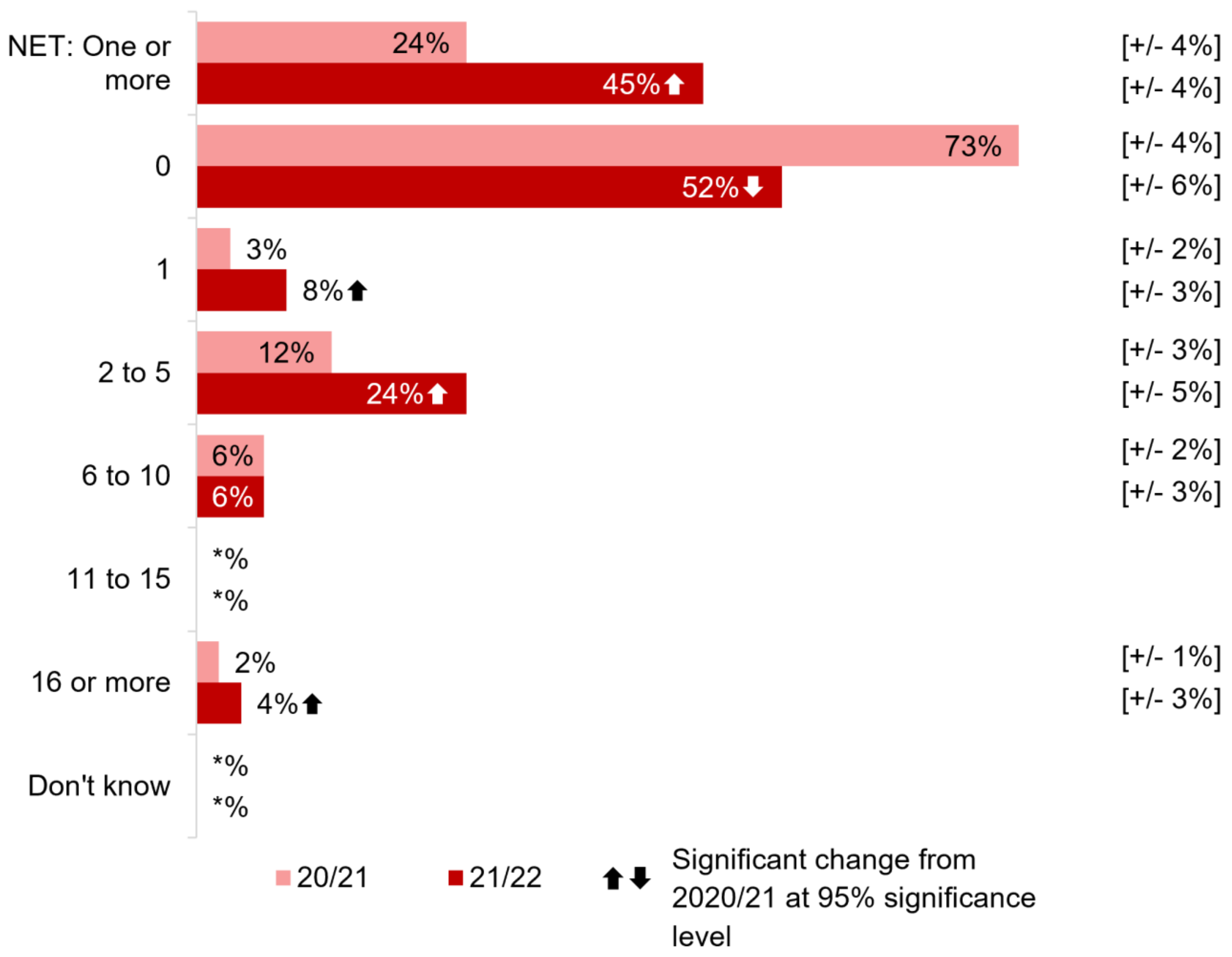
QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation?
Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21))

International contacts

Businesses were asked how many overseas contacts they had made as a result of using Webinars over the past year (Chart 4.4.18). Nearly half (45%) of businesses made at least one new overseas contact in the year since using the Webinars service, with 24% making between two and five new contacts. More than half (52%) of businesses reported that they had not made any new contacts as a result of using the Webinars service.

Compared to the RIS 2020/21, businesses were more likely to have made at least one new overseas contact (45%, up from 24% in 2020/21). Specifically, there were increases in those making one new contact (8%, up from 3%), two to five new contacts (24%, up from 12%), and 16 or more new contacts (4%, up from 2%).

Chart 4.4.18 Number of new overseas contacts made in previous 12 months – Webinars

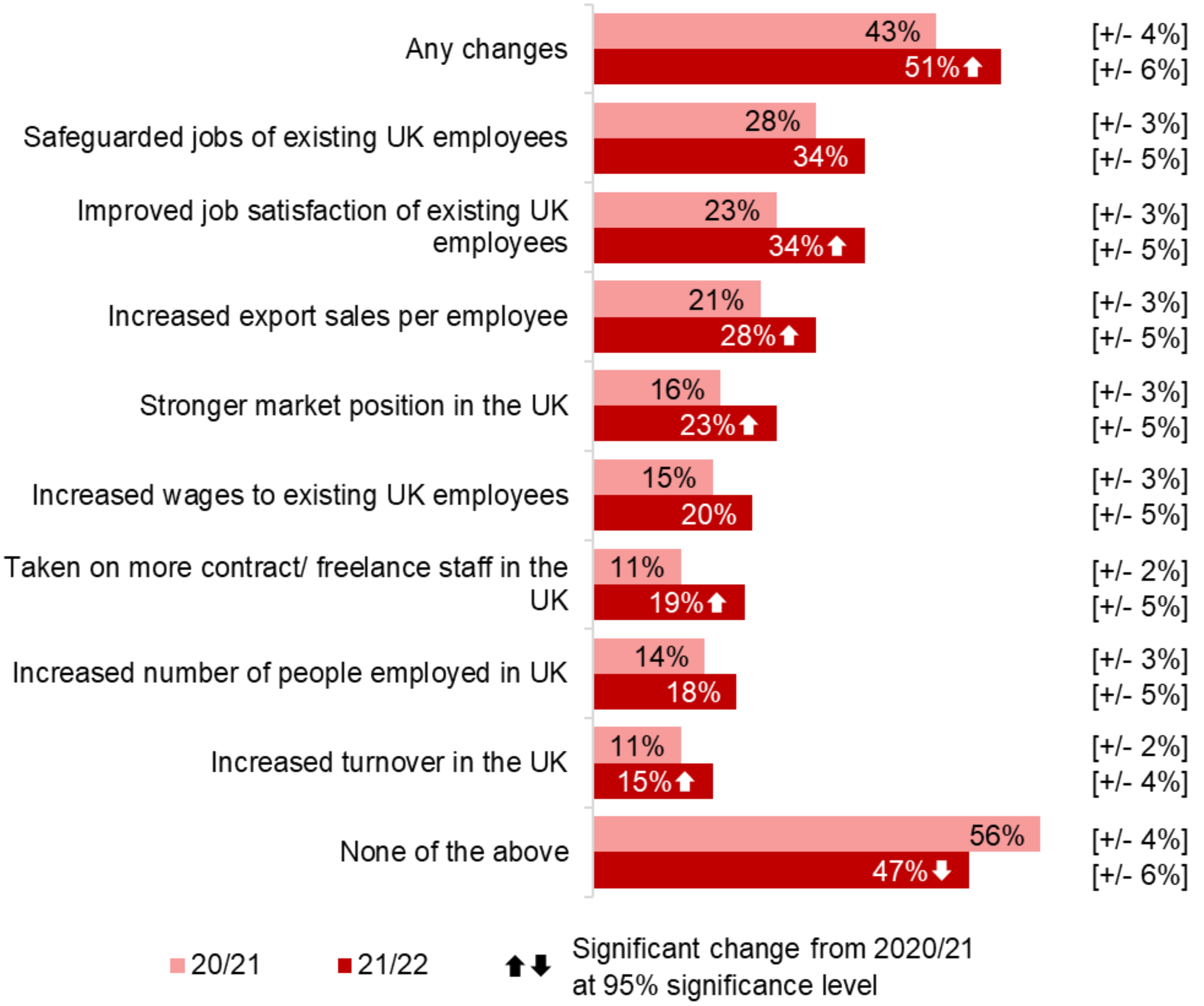


QContactsMade: How many new overseas contacts, if any, did your business make as a result of the service in the past year?
*Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21)) *Redacted*

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Webinars service (Chart 4.4.19). Around half (51%) expected or had seen some kind of change, with the most common responses being safeguarding jobs of existing UK employees (34%) and improving job satisfaction of existing UK employees (34%).

Compared to the previous year, businesses were more likely to say they had seen some kind of change (51%, up from 43% in 2020/21), improved job satisfaction among existing UK employees (34%, up from 23% in 2020/21), increased export sales per employee (28%, up from 21% in 2020/21), a stronger market position in the UK (23%, up from 16% in 2020/21), taken on more contract/freelance staff in the UK (19%, up from 11% in 2020/21) or increased their turnover in the UK (15%, up from 11% in 2020/21). There was a decrease in the number of businesses that reported none of the above from the RIS 2020/21 (47%, down from 56% in 2020/21).

Chart 4.4.19 Changes expected / seen in the UK business as a result of receiving the service – Webinars



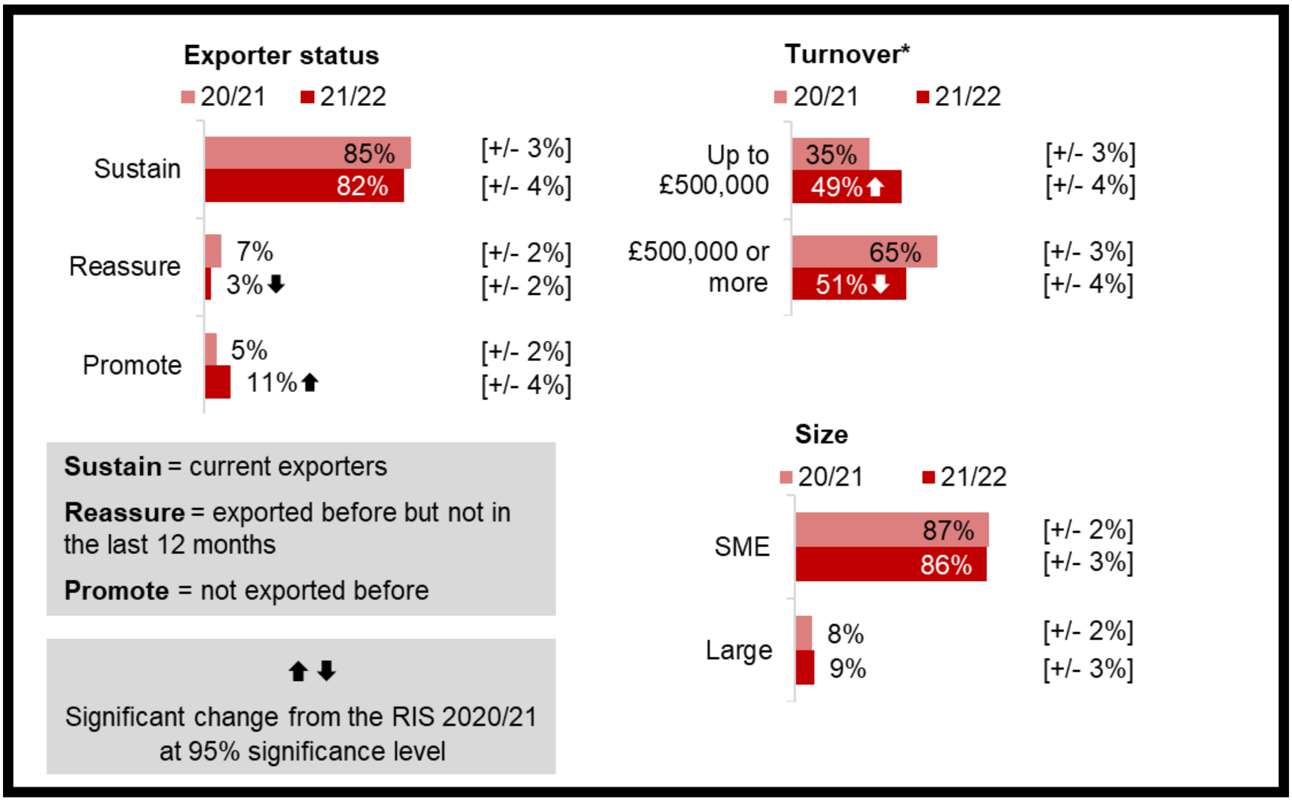
QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?
Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21))

4.4.9 Profile of respondents

Looking at all businesses that used 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), more than eight in ten (82%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. As shown in Chart 4.4.24, there was a decrease in businesses that had exported before but not in the last 12 months (3%, down from 7% in 2020/21). However, there was an increase in businesses that had not exported before (11%, up from 5% in 2020/21).

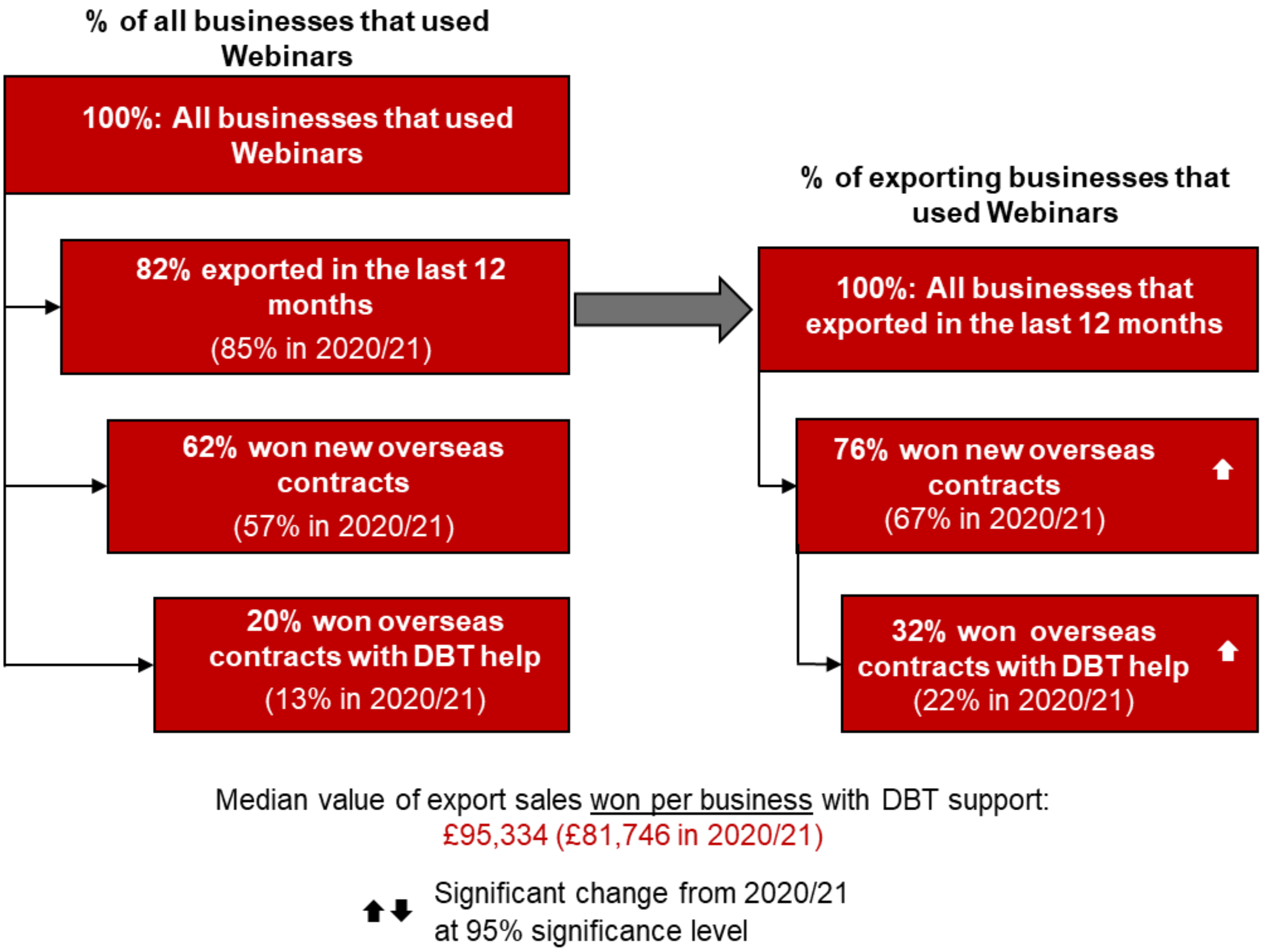
There was also a change in turnover profile, with an increase in businesses with a turnover up to £500,000 (49%, up from 35% in 2020/21), and a decrease in the proportion of businesses with a turnover of £500,000 or more (from 65% in 2020/21 to 51% in 2021/22). There was no change in business size profile since the previous year.

Chart 4.4.24 Profile of RIS Respondents – Webinars



*Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21)); *All businesses that used Webinars not including 'Don't know' and 'Refused' responses (n=365 (2021/22), n=973 (2020/21))*

Chart 4.4.25 Summary of businesses supported by Webinars



Base: All businesses that used Webinars (n=472 (2021/22), n=973 (2020/21)); All businesses that used Webinars and that exported in the last 12 months (n=382 (2021/22), n=838 (2020/21); All businesses that used Webinars and that won at least one overseas business contract in the last 12 months (n=291 (2021/22), n=556 (2020/21); All businesses that used Webinars and that won at least one overseas business contract with the help of DBT (n=84 (2021/22), n=130 (2020/21). *Small base size.*

Appendix: Reporting exporting outcomes based on 'all respondents'

There are several charts within the RIS report (such as chart 4.1.10) which report on the proportion of all businesses that DBT 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 DBT for these new overseas sales contracts.

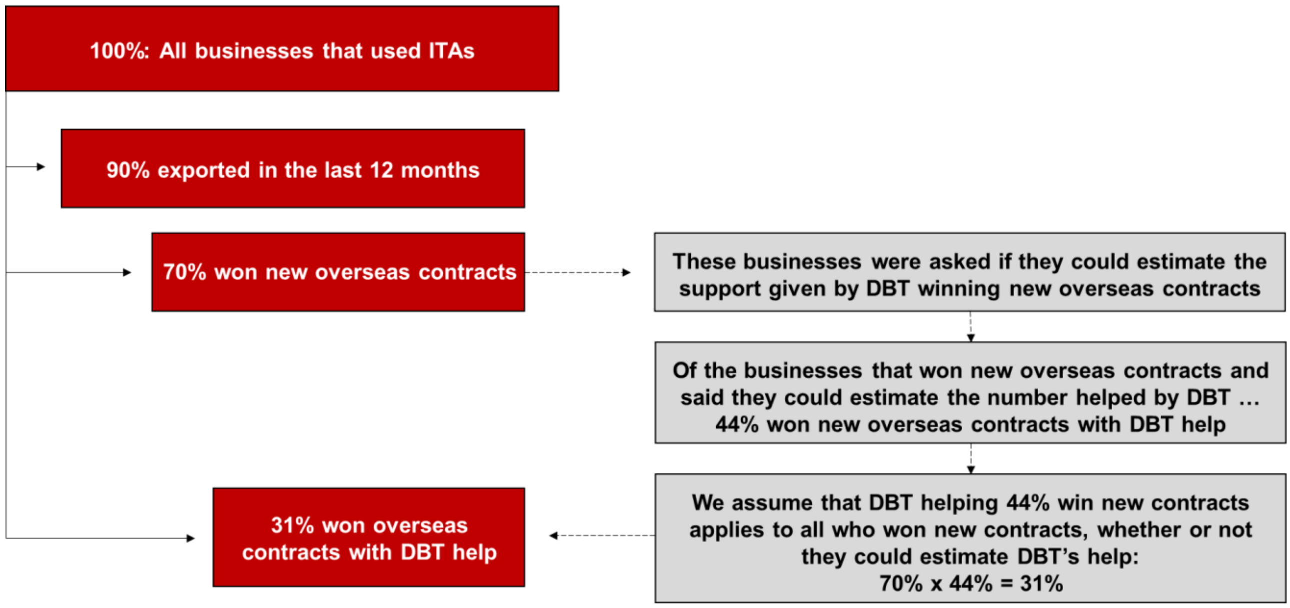
In line with previous waves, businesses that answered 'yes' to questions QContractService[27] or QContractDIT[28] were asked a series of questions about the impact of DBT services on their new overseas business contracts. Businesses that answered 'no' were not asked about the levels of assistance given by DBT 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 DBT help on their 'export sales'.

In order to calculate data based on the proportion of *all* businesses that DBT helped win any new overseas business contracts, an additional calculation was necessary. The assumption was made that the proportion of businesses helped by DBT 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 DBT and that had won any as a result of DBT help. If the respondent said "No – DBT made no impact", they were given a response of 0 contracts helped by DBT. Chart 5.1 shows the process.

[27] 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 using the service?*
[28] If the answer to QContractService above was not "Yes" the respondent was asked 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 DBT?*

Chart 5.1: Process for calculating the proportion of businesses that won new overseas contracts with DBT help (using ITAs as an example)



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Any enquiries regarding this publication should be sent to us at

enquiries@businessandtrade.gov.uk.