Department for
Business & Trade

Export Client Quality Survey for Businesses Supported April 2022 to March 2023

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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

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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) and former 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. DBT offers export promotion services to businesses who wish to seek support with exporting. It tracks the quality and reported impact of its export promotion services through monthly surveys, known as the Export Client Survey (ECS). The main aims of the ECS are to:

- Track client perceptions of 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 QS.[1] The findings are based on 3,999 interviews conducted by Ipsos UK with businesses who used a DBT service between April 2022 and March 2023 (2022/23). 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.

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

1.1.1 International Trade Advisers (ITAs)

The Net Promoter Score (NPS), a summary of how likely it is that businesses would recommend using the service or product, for ITAs was +46, which was consistent with +48 in the previous year. Similarly, satisfaction with ITAs remained consistent with the previous year (82% compared to 83% in 2021/22), as did the rating that the overall ITA service had met businesses' needs (74% compared to 76% in 2021/22).

Compared to the previous year, businesses were more likely to have taken actions as a result of using the ITAs service, in particular identifying new export opportunities or making new contacts (61%, up from 53% in 2021/22), making investments to support exporting (37%, up from 32%), looking for other export support services (33%, up from 27%), securing finance or funding (31%, up from 24%), making a deal that would yield exports (30%, up from 24%), and using other export support services (22%, up from 17%).

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

However, there was a decrease in the proportion of ITA businesses who said they had researched the paperwork and regulations needed to export (44%, down from 49% in 2021/22) as a result of using ITAs. Businesses were also less positive about the organisation of the service than in the previous year, though positivity remained high overall (84%, down from 88% in 2021/22).

1.1.2 Missions

The NPS for Missions was +37. Similarly, satisfaction with the service 82% and ratings of whether the service had met businesses' needs were 82% and 74% respectively.

Businesses were less positive about a few metrics relating to the service, in particular the time taken to receive information (78%), and how clear the steps were they needed to take after using the service (59%).

However, as a result of using the service more businesses had made a deal that would yield exports (39%). In addition, businesses who had identified an opportunity as a result of using the Missions service were more likely to report making a new business contract or expanding an existing one (41%).

1.1.3 Posts

The NPS for Posts was +26, in line with the previous year (+25 in 2021/22). Satisfaction with Posts remained in line with the previous year (72% compared to 73% in 2021/22).

Businesses were less likely to say that overall Posts service had met their needs than in the previous year; around six in ten (62%) rated it as good overall (compared to 69% in 2021/22). Posts businesses were also less likely to be positive about staff knowledge (80% compared to 85% in 2021/22) and the organisation of the service (78% compared to 86% in 2021/22).

However, more businesses had taken action as a result of using Posts. Specifically, businesses were more likely to say they had used other export services (17% compared to 12% in 2021/22) or secured finance or funding (13% compared to 8%). At the same time, Posts businesses were also less likely to have made investments to support new or increased export opportunities. Specifically, businesses were less likely to have increased their marketing and sales activity (79% compared to 89% in 2021/22), increased the number of UK staff (46% compared to 67%) and increased the number of staff abroad (26% compared to 45%).

1.1.4 Export Support Service – International Markets (ESS-IM)

The NPS for ESS-IM was +17. Satisfaction with the service and ratings of whether the service had met businesses' needs were 66% and 59% respectively.

Businesses were less positive about a few metrics relating to the service, in particular the levels of staff knowledge (74%) and the amount of time taken to receive information (68%).

1.1.5 Export and Investment Teams

The NPS for Export and Investment Teams was +16, which was in line with the previous year (+12 in 2021/22). Similarly, satisfaction with the service (61%) and ratings of whether the service had met businesses' needs (58%) were broadly in line with the previous year (68% and 61% respectively).

Compared to the previous year, fewer businesses who had identified new opportunities had made a new or expanded business contract (32%, down from 49% in 2021/22).

1.1.6 Export Support Service – Service Delivery Centre (ESS-SDC)

ESS-SDC was first introduced to the Export Client Survey in April 2022. No comparison can be drawn from the previous year (2021/22). The NPS for ESS-SDC was -3, but over half (55%) of ESS-SDC users were satisfied with the service, with a quarter (24%) being dissatisfied.

Please note that ESS-SDC service deliveries were only recorded for the ECS if escalated through Policy Hub and EU MAC queries.

1.1.7 Export Academy

The NPS for Export Academy was +27, which was lower than the NPS of +35 in the previous year (2021/22). Satisfaction with the service was high, with 68% of Export Academy businesses saying they were satisfied, although this was also lower than in the previous year (78%).

Compared to the previous year, businesses were less positive about several metrics relating to the service, including staff knowledge (85%, down from 90% in 2021/22), how comprehensive the information they received was (78%, down from 84%), the amount of time taken to receive information (72%, down from 82%), and the clarity of the steps they needed to take when using the service (72%, down from 78%) and after using the service (59%, down from 70%).

However, Export Academy businesses were also more likely to have taken actions as a result of using service compared to 2021/22. In particular, there were increases in the proportion of businesses who had identified new export opportunities or made new contacts (43%, up from 38% in 2021/22), looked for other export support services (34%, up from 26%), made investments to support exporting (23%, up from 16%), used other export services (22%, up from 15%), and secured finance or funding (11%, up from 8%). However, businesses using Export Academy were less likely to have started or increased exporting (16%, down from 21% in 2021/22).

1.1.8 Webinars

The NPS for Webinars was +14, in line with the previous year (+13 in 2021/22). Satisfaction with Webinars also remained consistent with the previous year (71% compared to 67% in 2021/22).

Users were more likely to report cost as a barrier to exporting than in the previous year (47% compared to 36% in 2021/22). When asked whether using Webinars had helped them to overcome barriers to exporting, businesses were more likely to report that using Webinars had helped them understand how to increase their knowledge of the exporting opportunities that were available (60% compared to 52% in 2021/22).

As a result of using this service, more businesses said they had secured finance or funding (13% compared to 7% in 2021/22). However, businesses were less likely to have made R&D investment this year (51% compared to 66% in 2021/22) and to have increased the number of staff abroad (14% compared to 32% in 2021/22).

2 Introduction

2.1 Background to the research 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 former 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 Quality Survey. This is primarily a telephone survey (an online option is also available) reporting on the number of unique businesses supported by DBT, the perceived quality of the advice and support, and firms' satisfaction with the service received by product or service. The findings in this report are based on interviewing businesses who used DBT services between April 2022 and March 2023 (2022/23). Throughout this report, when findings from businesses who used DBT services in 2022/23 are compared to findings from the 2021/22 survey, these are statistically significantly different at the 95% probability level.

2.3 Sample frame and fieldwork

Table 2.3.1 provides an overview of the DBT services that are in scope of this research.

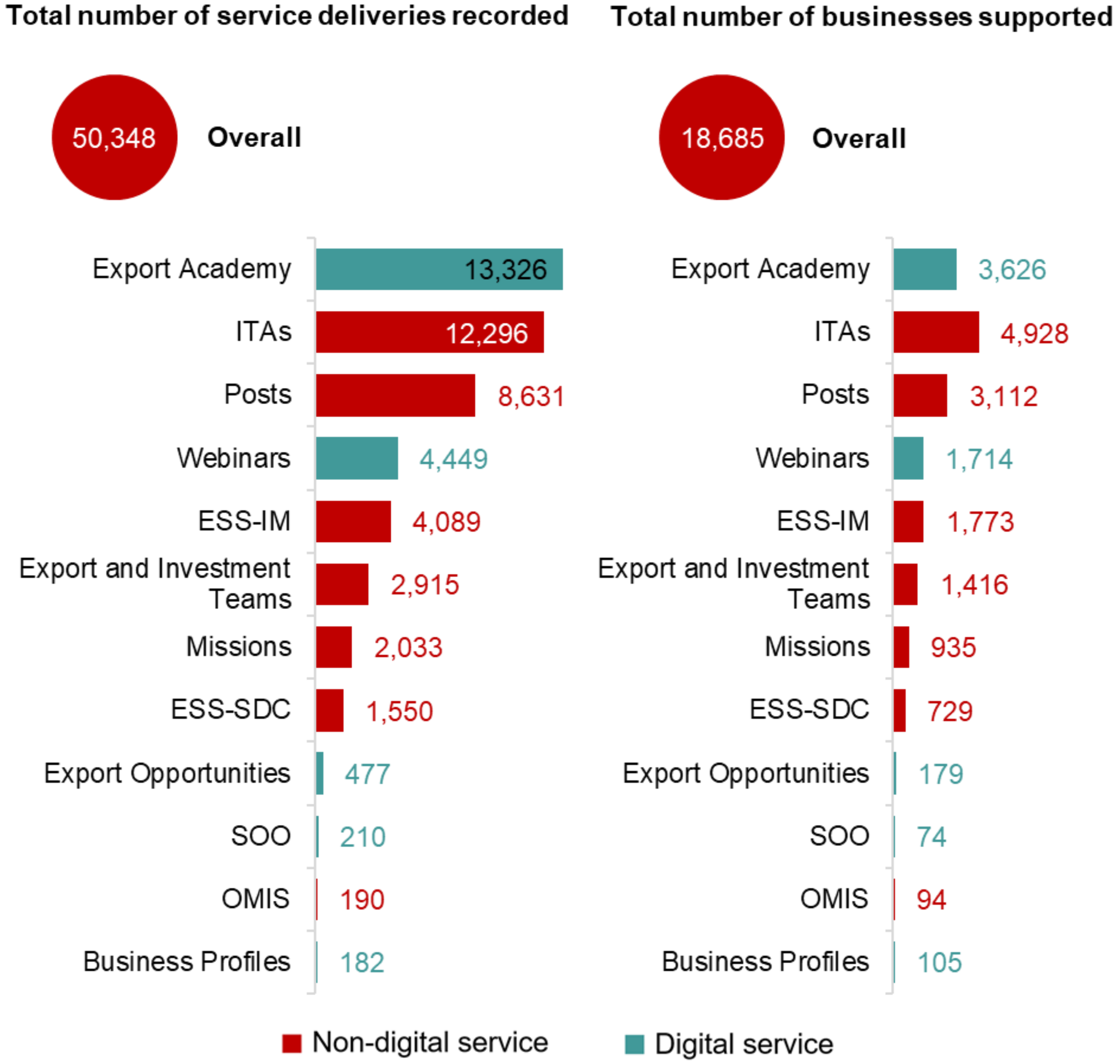
Table 2.3.1: DBT export promotion services

Service	Service description	Digital or non-digital	Interviews achieved (2022/23)
International Trade Advisers (ITAs)	Provides businesses with impartial face-to-face advice, to help them to identify the services and support they need to grow internationally.	Non-digital	1,277
Missions	Services related to events (trade fairs and market research) but with a specific focus on face-to-face deal-making.	Non-digital	195
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	509
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	319
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	245
Export Support Service – Service Delivery Centre (ESS-SDC)	A helpline and online service about exporting products or services to Europe. ESS-SDC service deliveries were only recorded for the ECS if escalated through Policy Hub and EU MAC queries.	Non-digital	103
Export Academy	Gives businesses the know-how to sell to customers around the world by learning from experts in international trade.	Digital	914
Webinars	Aim to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting.	Digital	362
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	13
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	18
Export Opportunities	An online service on great.gov.uk which promotes global exporting opportunities to UK businesses	Digital	25
Business Profiles	An online service which enables businesses to promote products and services to international buyers.	Digital	19

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

In total, there were 50,348 recorded service deliveries related to the services covered by the ECS between April 2022 and March 2023. From these records, 18,685 individual unique businesses were supported through all the services covered by the ECS between this period. This includes the services that are not covered in depth in this report due to an insufficient sample being available.

Chart 2.3.1: Service deliveries recorded and businesses supported, by service type (April 2022 to March 2023)[3,4]



[3] All 182 eligible Business Profiles service deliveries corresponded to an individual unique business supported, i.e. all businesses were sampled, and there was no overlap with other services.
[4] Roughly 23% of ESS-IM service deliveries were removed from the sample for service deliveries between April 2022 and November 2022 following an eligibility remapping during survey fieldwork. These ineligible service deliveries have not been reported on in any other part of this report. For more information about sampling and eligibility, please consult the accompanying Technical Report.

2.3.1 Fieldwork

The majority of the interviews were conducted using Computer-Assisted Telephone Interviewing (CATI), with only 15 responses using Computer-Assisted Web Interviewing (CAWI) online. The use of CAWI was introduced into the Export Client Survey at the request of DBT to facilitate the potential accessibility needs of respondents. All respondents were sent an email prior to being contacted, to let them know the purpose of the research and provide them with an opportunity to contact Ipsos UK to ask any questions or opt out of the research. Fieldwork for this report began in July 2022 (interviewing businesses who received support from DBT in April 2022). This report covers DBT services delivered between April 2022 and March 2023. The mean interview length was 22 minutes and 1 second.

2.4 Methodology

2.4.1 Sample design

The Quality Survey is based on a monthly sample of businesses which have used a DBT export promotion service. The sample is designed to be representative of businesses supported by DBT, permitting analysis of each service. The sample design and selection take into account the longitudinal aspect of each business' interactions with DBT products and services, i.e. the varying combinations of historic service deliveries received by a business. Survey questions and analysis of the survey data focus on a single specific interaction with DBT and should not cover previous interactions with DBT. However, we are not able to fully control the wider experiences that the business may draw on when responding.

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

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

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

There is normally a three-month period between when a business interacts with DBT and when the interview is conducted. For example, interactions in April 2022 were included within the July 2022 sample etc. This is part of the survey design to ensure the interaction was recent enough to be memorable. A number of measures were implemented to aid recall and minimise the impact of this on the data, such as sending respondents an advance email informing them about the survey or prompting respondents with the name of the service they used and when they used it.

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

One service was added to the ECS for the first time in 2022/23. This was the Export Support Service (ESS). There is no data available for 2021/22 for this service for comparison.

2.5 Analysis

Many of the questions in the survey asked participants to rate their customer experience using a scale from zero to ten, where ten was the most positive response and zero was the least positive response. Responses have been grouped into positive (a score of seven or higher), neutral (a score of four to six), and negative (a score of three or below).[6] Respondents could also say ‘Don’t know’ or ‘Not applicable’. Respondents who said the question did not apply to them were excluded from the analysis. Those who answered ‘Don’t know’ or ‘Refused’ are generally included in analysis. However, where results are broken down by business turnover, ‘Don’t know’ and ‘Refused’ answers are excluded to maximise year-on-year comparability.

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

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

Charts and tables in the report also display the confidence intervals (CI) for each survey question estimate. When a survey is carried out, the respondents who take part are only a subset of those in the population and as such may not give an exact representation of the ‘true’ average in the population. These CIs indicate the range within which it is 95% likely that the true value lies.

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

Findings for OMIS, Selling Online Overseas, Export Opportunities and Business Profiles services have not been included in this report, due to small base sizes. Additionally, the breakdown by regions for ITAs, Posts and ESS-IM where there are small base sizes have also been removed. As Missions and ESS-IM was not included in the previous year report, there is no year-on-year comparison for these services.

2.5.1 Weighting

The survey data is weighted to ensure that the achieved sample is as representative of the entire population of businesses supported as possible and accounts for (i) the number of

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

businesses supported for each individual service, and (ii) the number of businesses supported each month.

We calculated weights at two levels:

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

2.6 Changes to the survey since the previous year

A number of changes were introduced to the survey questionnaire compared to the previous year (2021/22) in light of changes to service delivery and policy priorities. This included:

- Removal of the question on how many years the business had been selling goods and/or services overseas
- Additional breakdowns of export regions for the Middle East, and changes to the breakdowns for Asia
- Removal of the question about whether the business had been in contact with any other organisations, apart from DBT, to find out about exporting
- Additional barrier for ‘time’ added to the question on barriers
- New question on issues that have limited the business’ ability to export successfully
- Removal of question on contacts made as a result of the service used
- Removal of the question about when the business first started using a DBT service
- Changes to the question about whether the proportion of turnover from exports has changed over the past 12 months

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

3 Product findings

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

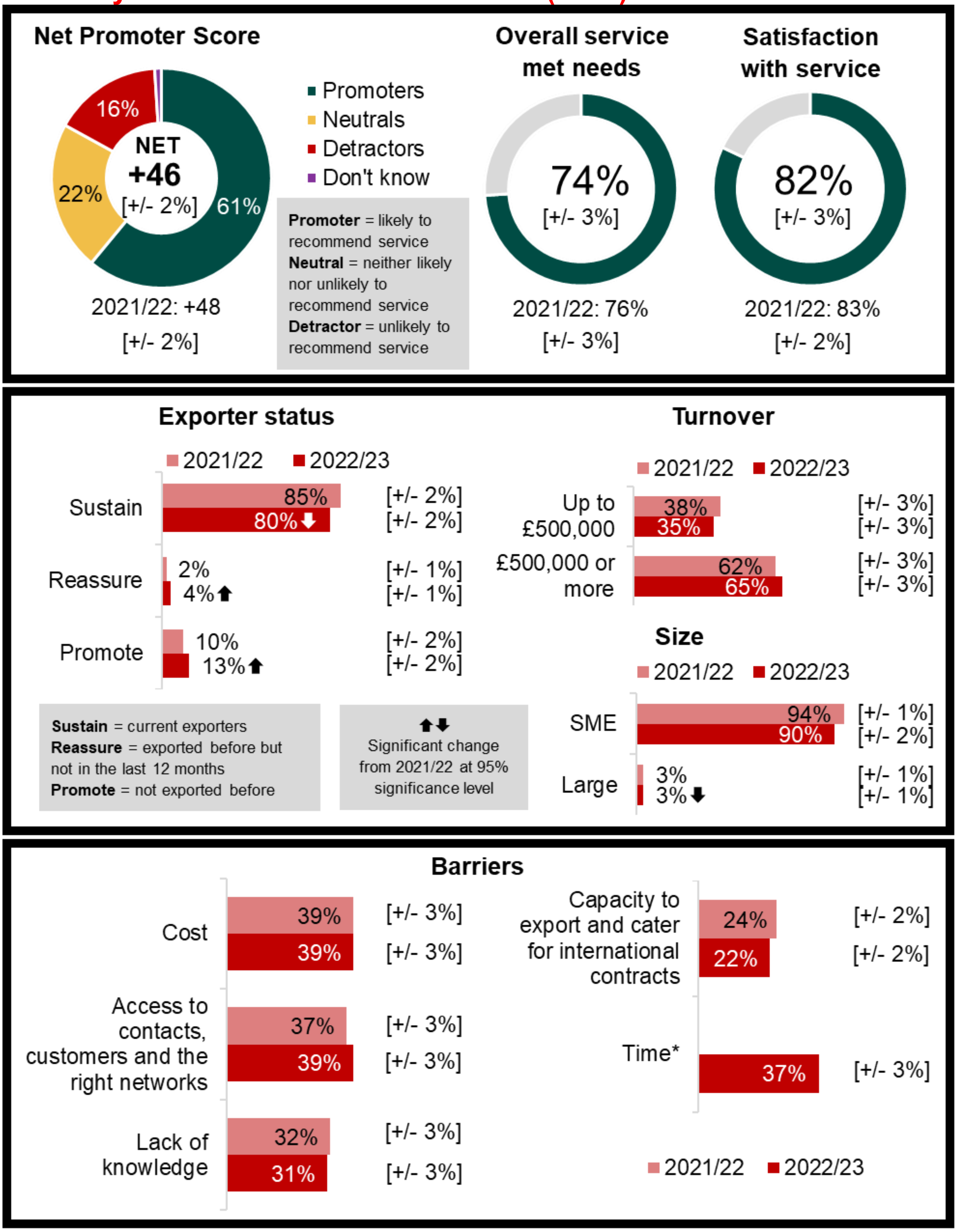
The analysis includes two key metrics:

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

The findings for each DBT service or product are presented alongside the findings from 2021/22. Only changes that are statistically significant are highlighted in the text. Charts and tables represent a statistically significant increase from 2021/22 with an upwards facing arrow (🡅), a decrease with a downwards facing arrow (🡇), and no change with a dash (in tables) or no symbol at all (in charts).

Questions with a base size of fewer than 100 respondents have not been included in this report. Any response options to a question which had fewer than 10 responses have been redacted.

Summary: International Trade Advisers (ITAs)



*Base: All businesses who used the service (n=1,479 (2021/22), n=1,277 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=1,446 (2021/22), n=1,245 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=1,465 (2021/22), n=1,257 (2022/23)); Exporter status (n=1,479 (2021/22), n=1,277 (2022/23)); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=1,139 (2021/22), n=902 (2022/23)); Size - All businesses who used the service (n=1,479 (2021/22), n=1,277 (2022/23)); Barriers - All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=1,457 (2021/22), n=1,251 (2022/23)), Cost (n=1,448 (2021/22), n=1,241 (2022/23), Lack of knowledge (n=1,459 (2021/22), n=1,248 (2022/23)), Capacity to export (n=1,443 (2021/22), n=1,229 (2022/23)), Time (n=1,233). * Code added in 2022/23.*

3.1 International Trade Advisers (ITAs)

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

This chapter explores satisfaction with the ITA service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 1,277 businesses who used an ITA between April 2022 and March 2023.

Key changes since 2021/22:

The NPS for ITAs was +46, which was consistent with the NPS score of +48 in the previous year. Similarly, satisfaction with ITAs remained consistent with the previous year (82% compared to 83% in 2021/22), as did the rating that the overall ITA service had met businesses' needs (74% compared to 76% in 2021/22).

Compared to the previous year, businesses were more likely to have taken actions as a result of using the ITAs service, in particular identifying new export opportunities or making new contacts (61%, up from 53% in 2021/22), making investments to support exporting (37%, up from 32%), looking for other export support services (33%, up from 27%), securing finance or funding (31%, up from 24%), making a deal that would yield exports (30%, up from 24%) or using other export support services (22%, up from 17%).

However, there was a decrease in the proportion of ITA businesses who said they had researched the paperwork and regulations needed to export (44%, down from 49% in 2021/22) as a result of using ITAs. Businesses were also less positive about the organisation of the service than in the previous year, though positivity remained high overall (84%, down from 88% in 2021/22).

The population of businesses supported by ITAs saw some changes since the previous year. Fewer businesses had a turnover of less than £85,000 compared to the previous year (11%, down from 15%), while more businesses had a turnover of between £500,000 and £9,999,999 (53%, up from 48%). Nearly two in five businesses (38%) reported that more than a quarter of their turnover came from exporting, down from 42% in 2021/22.

Current exporters made up the majority of businesses using the ITA service, although they constituted a smaller proportion than in the previous year. Four in five businesses (80%) were currently exporting (classified as 'Sustain'), down from 85% in 2021/22, while 13% had never exported before (classified as 'Promote'), and 4% had exported before but not in the past 12 months (classified as 'Reassure'), up from 2% the previous year.[7]

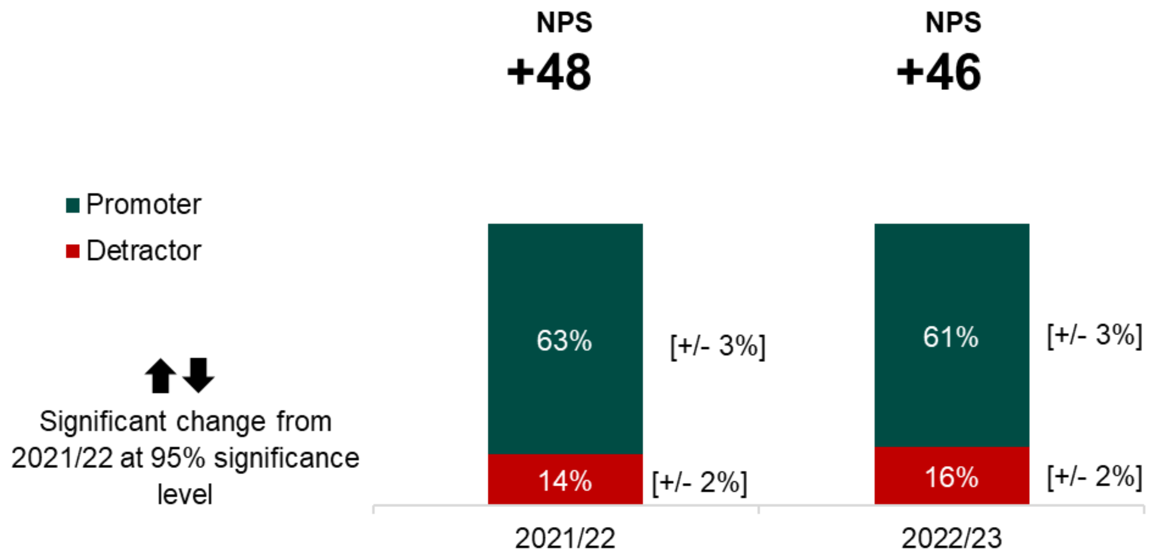
[7] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

3.1.1 Satisfaction with the ITA service

3.1.1.1 Service performance

Businesses were positive about the ITA service and were likely to recommend it to colleagues and business associates. Three in five businesses (61%) were likely to recommend the service (classified as ‘Promoters’), while 16% were unlikely to do so (classified as ‘Detractors’).[8] These findings were consistent with the previous year.

Chart 3.1.1 Likelihood of recommending service (NPS) – ITAs



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 who used the service (n=1,479 (2021/22), n=1,277(2022/23)). ‘Neutral’ and ‘Don’t know’ responses not shown.

The likelihood of recommending this service varied by ITA region. Businesses in the West Midlands (with NPS scores of +56) were most likely to promote the service. Businesses in the West Midlands also had an increased NPS when compared to the previous year, while businesses in the East of England had a decreased NPS when compared to the previous year. This is shown in Table 3.1.1 below.

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

Table 3.1.1 Net Promoter Score for service by ITA region[9]

Region	NPS (21/22)	CI (+/-) (21/22)	Base (21/22)	NPS (22/23)	CI (+/-) (22/23)	Base (22/23)	Change
Overall	48	2%	1,479	46	2%	1,277	-
North West	56	5%	219	52	4%	273	-
South West	56	6%	153	53	4%	140	-
North East	c	c	c	c	c	c	-
South East	48	6%	189	49	5%	167	-
East England	42	5%	221	27	5%	167	↓
West Midlands	40	5%	280	56	4%	219	↑
Yorkshire	40	7%	179	39	5%	144	-
East Midlands	40	9%	123	c	c	c	-

c Cells have been suppressed to protect confidentiality
↑↓ Significant change from 2021/22 at 95% significance level

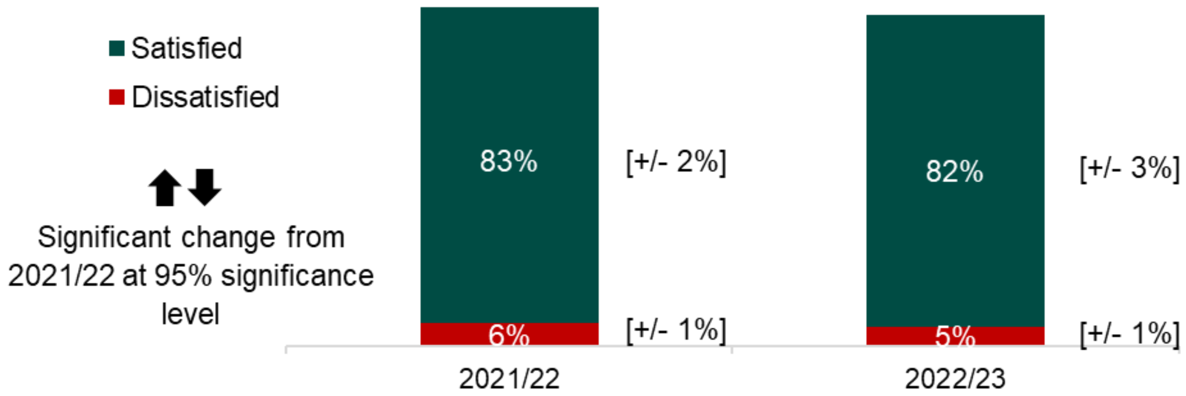
When asked about **suggestions to improve the service**, a third of respondents said that better support (32%) would improve the ITA service, while a quarter mentioned communication in some capacity (25%). Specifically, the most frequently suggested improvement for the service was introducing more communication or information (16%), followed by better follow up (10%), and more knowledgeable staff (10%).

[9] London was removed as an eligible ITA region by DBT in the 2022/23 Quality Survey and therefore has not been included in this table.

3.1.1.2 Satisfaction

Satisfaction with ITAs stayed consistent with the previous year. Over four in five respondents (82%) said they were satisfied with their experience (compared to 83% in 2021/22), and 5% said they were dissatisfied (in line with 6% in 2021/22).[10]

Chart 3.1.2 Satisfaction with service – ITAs



Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n=1,465 (2021/22), n=1,257 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

Satisfaction also varied somewhat by region. Satisfaction was highest in the South West (85%), North West (84%) and West Midlands (84%), and lowest in Yorkshire (78%). These findings were in line with the previous year. This is shown in Table 3.1.2.

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

Table 3.1.2 Satisfaction with service by ITA region[11]

Region	Satisfied (21/22)	CI (+/-) (21/22)	Base (21/22)	Satisfied (22/23)	CI (+/-) (22/23)	Base (22/23)	Change
Overall	83%	2%	1,465	82%	3%	1,257	-
South West	87%	4%	153	85%	8%	137	-
North West	87%	4%	219	84%	5%	271	-
East England	85%	5%	221	79%	7%	163	-
North East	c	c	c	c	c	c	-
South East	83%	5%	189	79%	7%	166	-
Yorkshire	82%	5%	181	78%	8%	142	-
East Midlands	79%	6%	123	c	c	c	-
West Midlands	77%	4%	280	84%	6%	213	-

c Cells have been suppressed to protect confidentiality
↑↓ Significant change from 2021/22 at 95% significance level

Of the 67 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction[12]** was feeling that the service did not give enough information or advice (63%). Around half of these businesses felt that the service did not meet their expectations (51%), and over a third reported that DBT did not have enough contact with their business (35%).

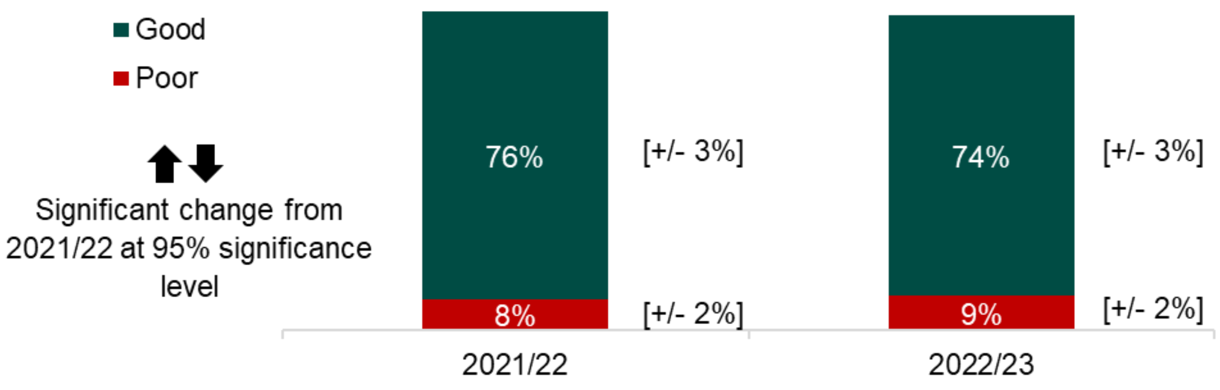
Compared to the previous year, more businesses were likely to feel that the service did not give them enough information or advice (63% compared to 45% in 2021/22). However, fewer businesses were likely to feel that the service did not do anything or did not help (19% compared to 53% in 2021/22).

[11] London was removed as an eligible ITA region by DBT in the 2022/23 Quality Survey and therefore has not been included in this table.
[12] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.

3.1.1.3 Whether overall service met needs

Businesses were positive that the ITA service had met their needs. Three-quarters (74%) rated it as good, and less than one in ten rated it as poor.[13] These findings were in line with the previous year.

Chart 3.1.3 Rating of whether overall service met needs – ITAs



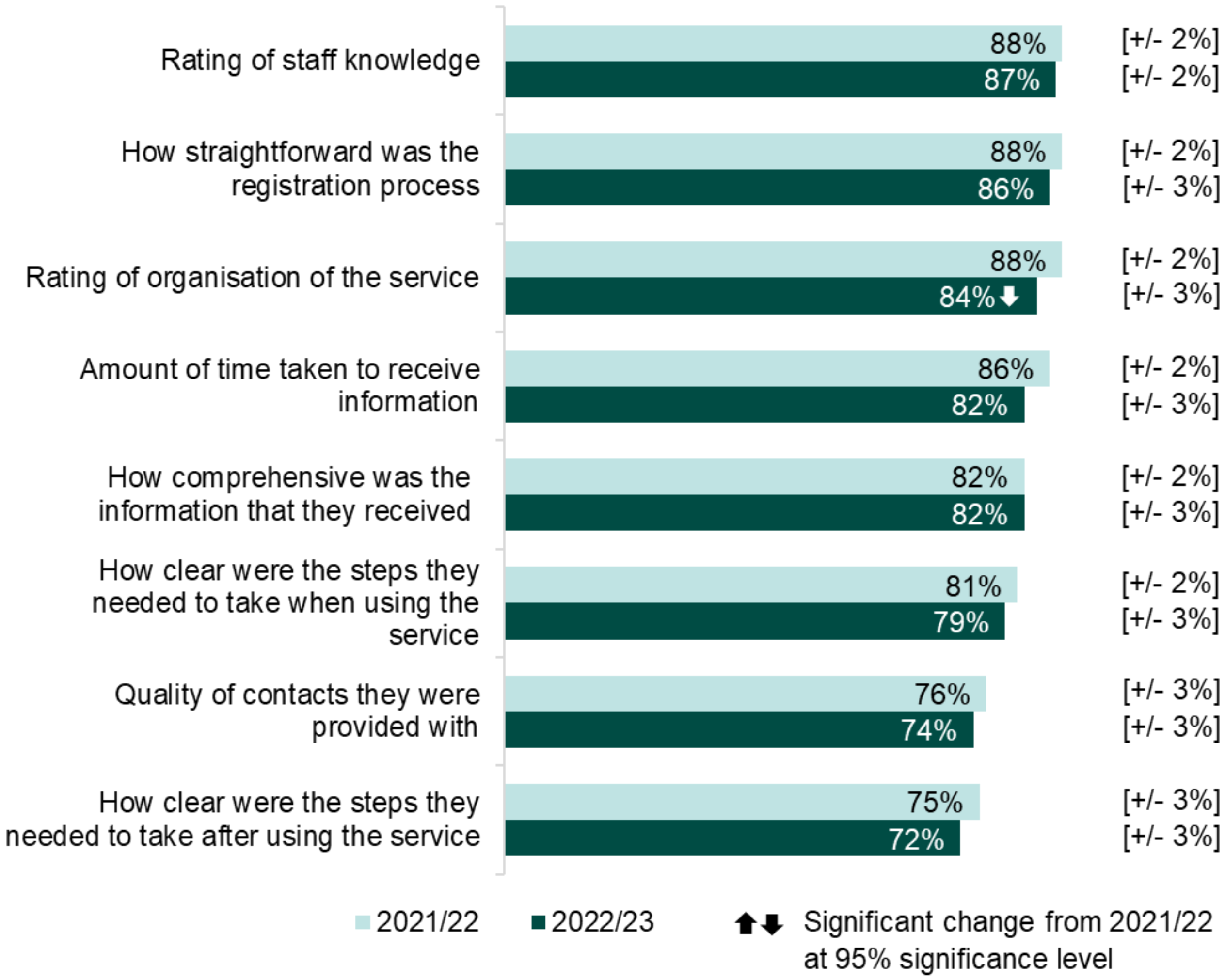
Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n=1,446 (2021/22), n=1,245 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

Businesses were most positive about staff knowledge (87%), the straightforwardness of the registration process (86%), and the organisation of the service (84%). This was followed by the amount of time taken to receive information (82%) and how comprehensive the information they received was (82%). They were least positive about how clear the steps were that they needed to take after using the service (72%).[14] Compared to the previous year, businesses were less positive about the organisation of the service (84% compared to 88% in 2021/22).

Medium-sized businesses were more positive about the organisation of the ITA service than micro and small-sized businesses (95% compared to 82% for micro/small businesses). This was in line with the previous year.

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

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



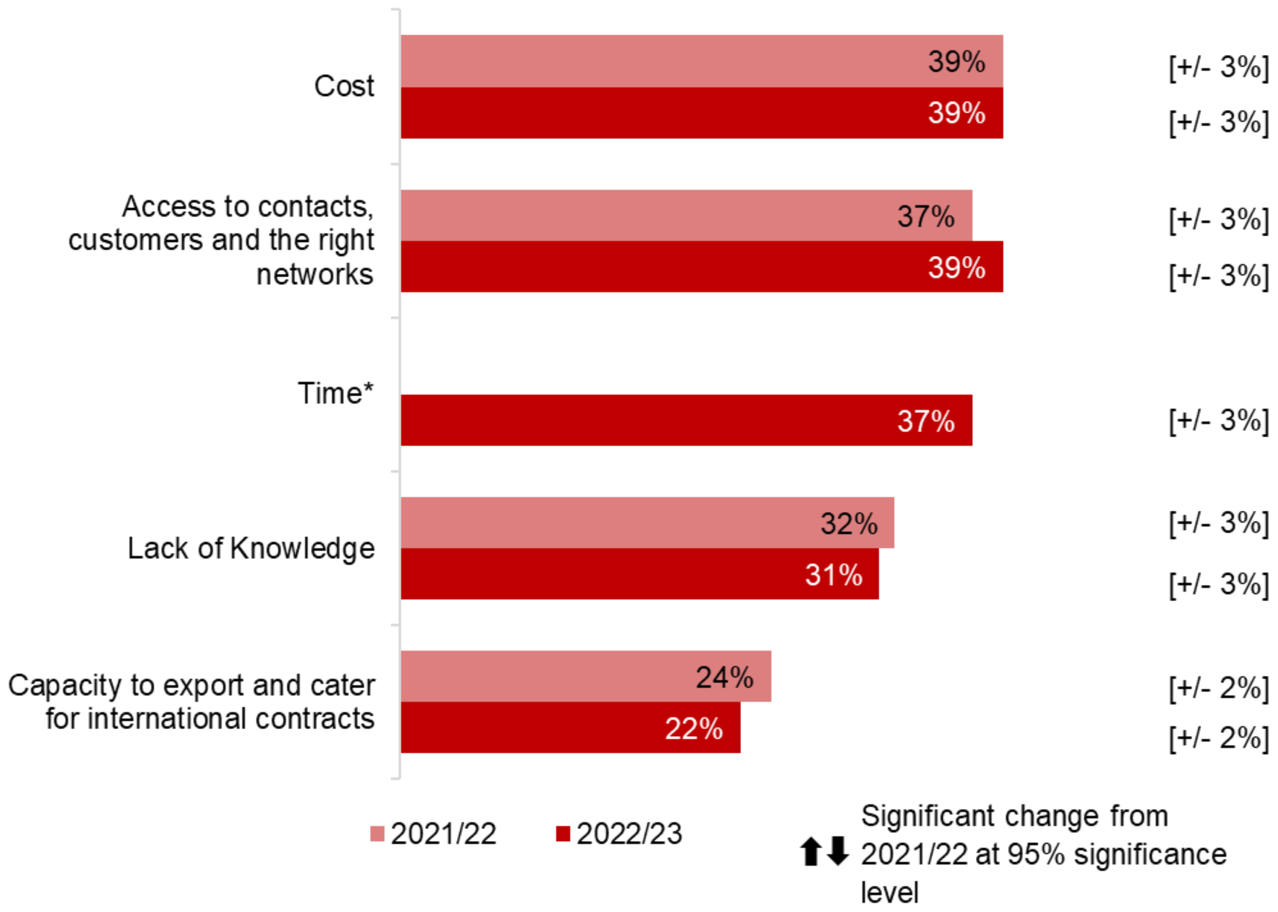
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=1,372 (2021/22), n=1,186 (2022/23)). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=1,426 (2021/22), n=1,227 (2022/23)). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=1,420 (2021/22), n=1,221 (2022/23)). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from the service? (n=1,427 (2021/22), n=1,225 (2022/23)). Qclarity_2 – The service made clear what I should do next after using it (n=1,409 (2021/22), n=1,210 (2022/23)). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through the service? (n=1,177 (2021/22), n=1,052 (2022/23)). Qreg – How straightforward was the registration process for the service? (n=995 (2021/22), n=848 (2022/23)). Qevent – How would you rate the organisation of the service? (n=975 (2021/22), n=758 (2022/23)). Base: All businesses who used the service (excluding 'not applicable' responses). 'Negative', 'Neutral' and 'Don't know' responses not shown.

3.1.2 Outcomes of using the ITA service

3.1.2.1 Counteracting the barriers to exporting

Businesses that used the ITA service reported facing barriers to exporting. Two in five reported cost (39%) and access to contacts, customers and the right networks (39%) as barriers, while a similar proportion reported time as a barrier (37%). Respondents were split about whether lack of knowledge was a barrier (31%) or not (29%). A fifth of businesses reported that their capacity to export and cater for international contacts was a barrier. These findings were in line with the previous year.

Chart 3.1.5 Barriers to exporting – ITAs

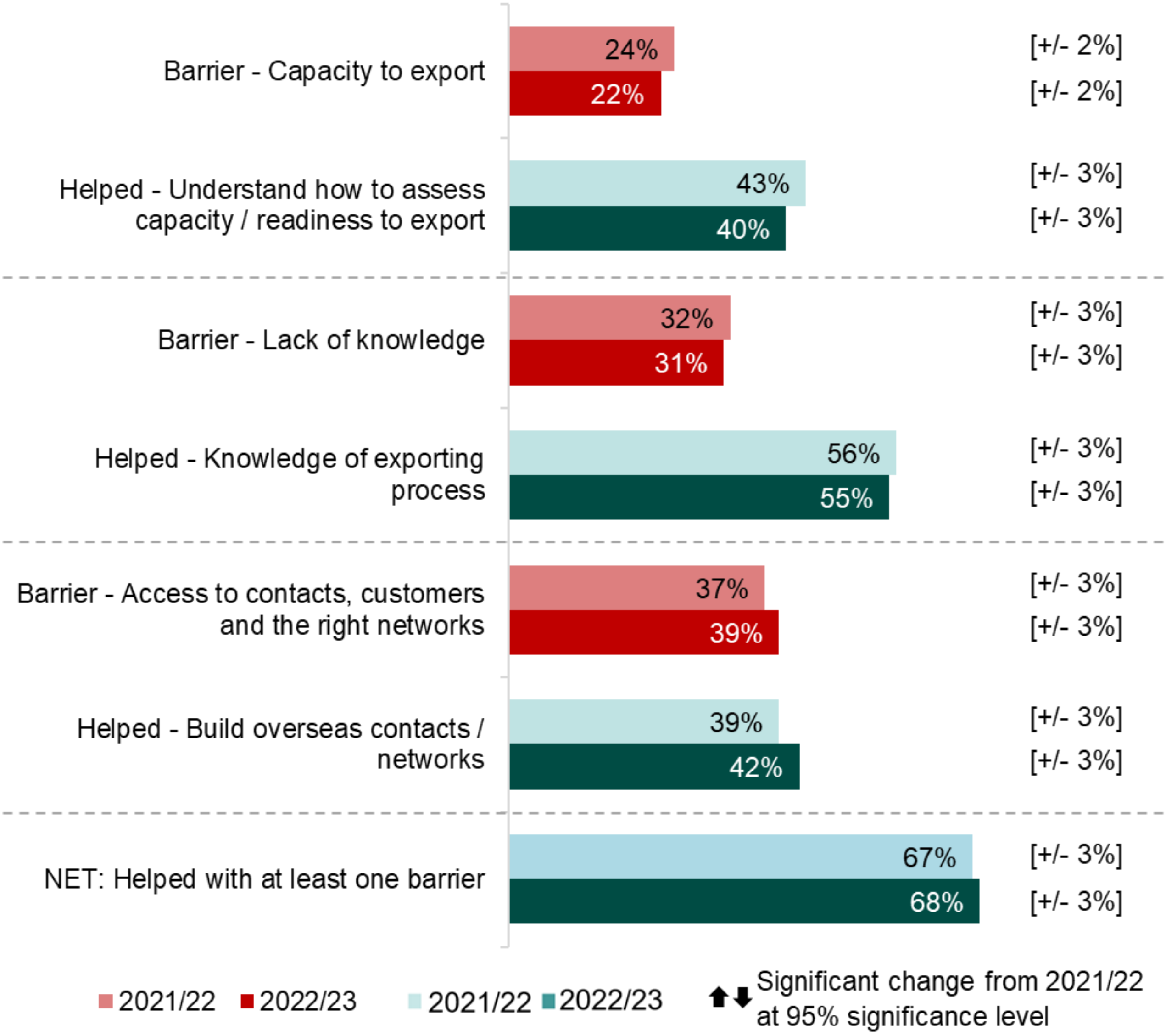


*Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=1,457 (2021/22), n=1,251 (2022/23)), Cost (n=1,448 (2021/22), n=1,241 (2022/23)), Lack of knowledge (n=1,459 (2021/22), n=1,248 (2022/23)), Capacity to export (n=1,443 (2021/22), n=1,229 (2022/23)), Time (n=1,233). 'Neutral', 'Not a barrier' and 'Don't know' responses not shown. * Code added in 2022/23.*

Smaller-sized businesses with a turnover of up to £500,000 were more likely to report cost as a barrier (42%), than those with a turnover over £500,000 (35%). Smaller-sized businesses with a turnover of up to £500,000 were also more likely to report capacity to export and cater for international contacts as a barrier (28%) than those with a turnover over £500,000 (20%).

Businesses were asked whether using ITAs (and therefore DBT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using ITAs had helped them understand how to increase their knowledge of the exporting process (55%), build overseas contacts or networks (42%), or assess their capacity and readiness to export (40%). Overall, two-thirds (68%) of businesses reported that using ITAs had helped them overcome at least one barrier. These findings were in line with the previous year.

Chart 3.1.6 Barriers to exporting and how DBT helped – ITAs



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=1,457 (2021/22), n=1,251 (2022/23)), Lack of knowledge (n=1,459 (2021/22), n=1,248 (2022/23)), Capacity to export (n=1,443 (2021/22), n=1,229 (2022/23))).
Qknowchange – Using the same scale as before, thinking about your experience of the service, to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks / understand how to assess capacity and readiness to export? Base: All businesses who used the service (n=1,479 (2021/22), n=1,277 (2022/23)).

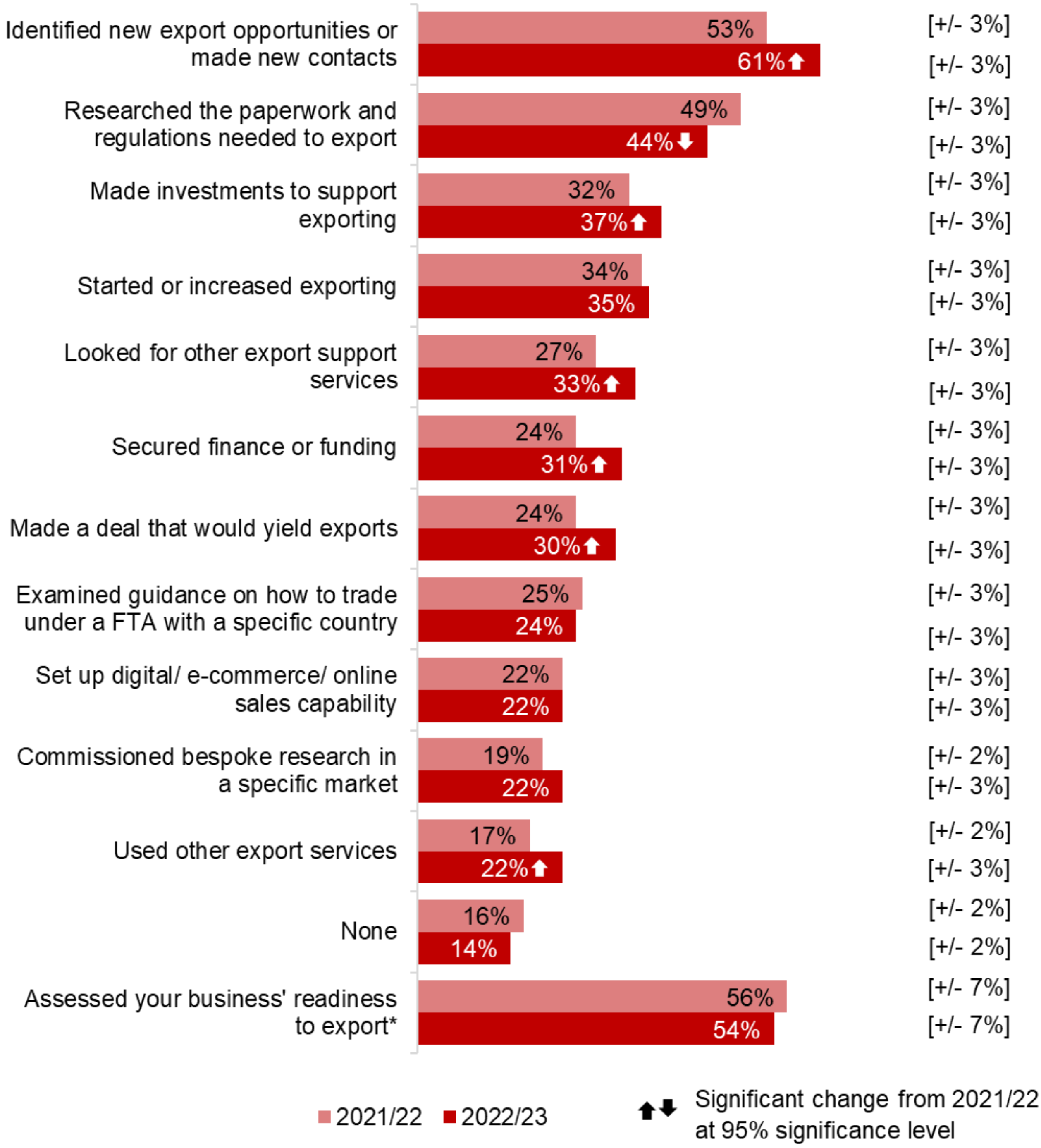
3.1.2.2 Taking action

Businesses had taken a range of actions as a result of using ITAs. Over half of businesses (54%) that were not exporting at the time of using the service, had assessed the business' readiness to export.

Among all businesses, three in five said they had identified new export opportunities or made new contacts (61%), which was an increase from the previous year (53% in 2021/22). Similarly, ITA businesses were more likely to have taken other actions as a result of using ITAs, in particular making investments to support exporting (37%, up from 32%), looking for other export support services (33%, up from 27%), securing finance or funding (31%, up from 24%), making a deal that would yield exports (30%, up from 24%), and using other export support services (22%, up from 17%).

Over two in five (44%) said they had researched the paperwork and regulations needed to export, although this was less than the proportion from the previous year (49% in 2021/22), and represents a two-year downward trend (55% in 2020/21).

Chart 3.1.7 Actions taken as a result of service interaction – ITAs

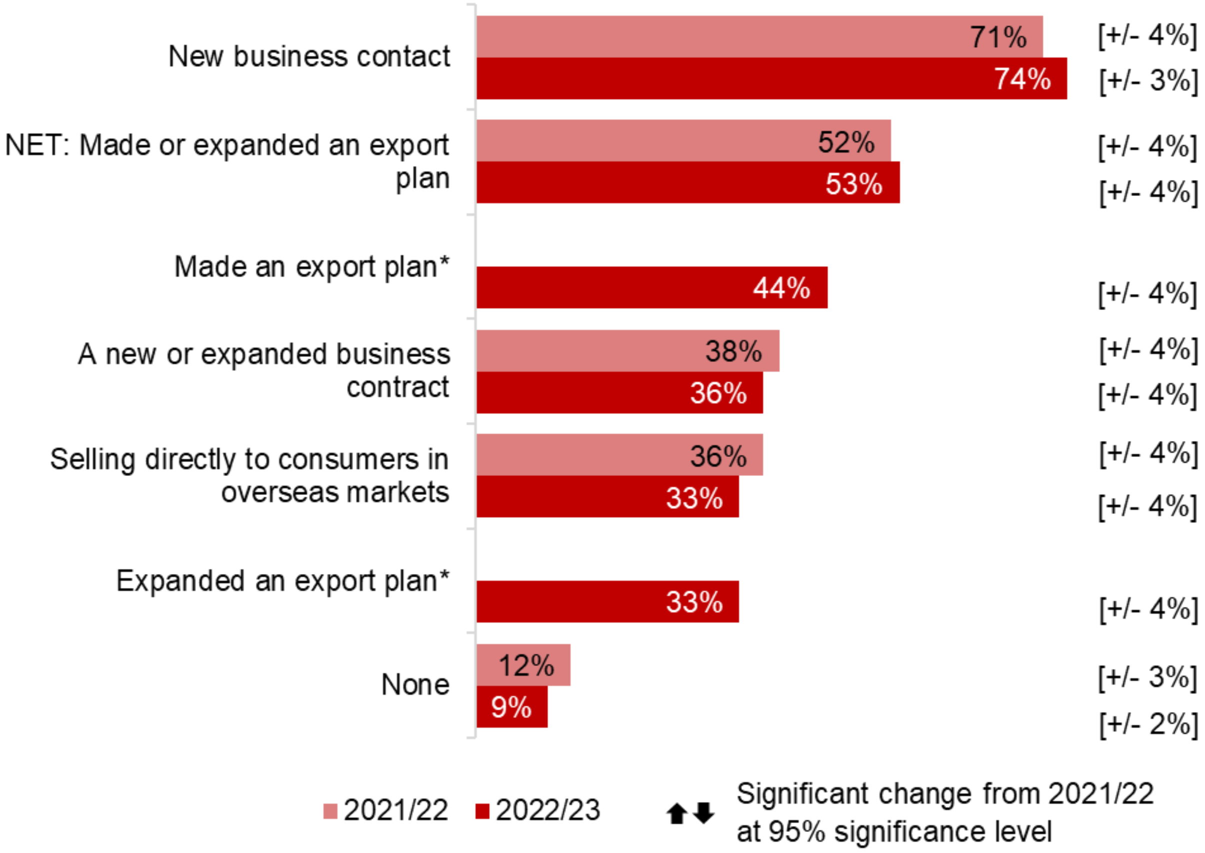


*Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n=1,479 (2021/22), n=1,277 (2022/23)); Non-exporters (n=215 (2021/22), n=217 (2022/23)). Only prompted codes are shown. * Asked to non-exporters only.*

3.1.2.3 Identifying new opportunities

As a result of using ITAs, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (74%), followed by making or expanding an export plan (53%), making a new or expanded business contract (36%) or selling directly to consumers in overseas markets (33%). These findings were in line with 2021/22.

Chart 3.1.8 Opportunities identified as a result of service interaction – ITAs

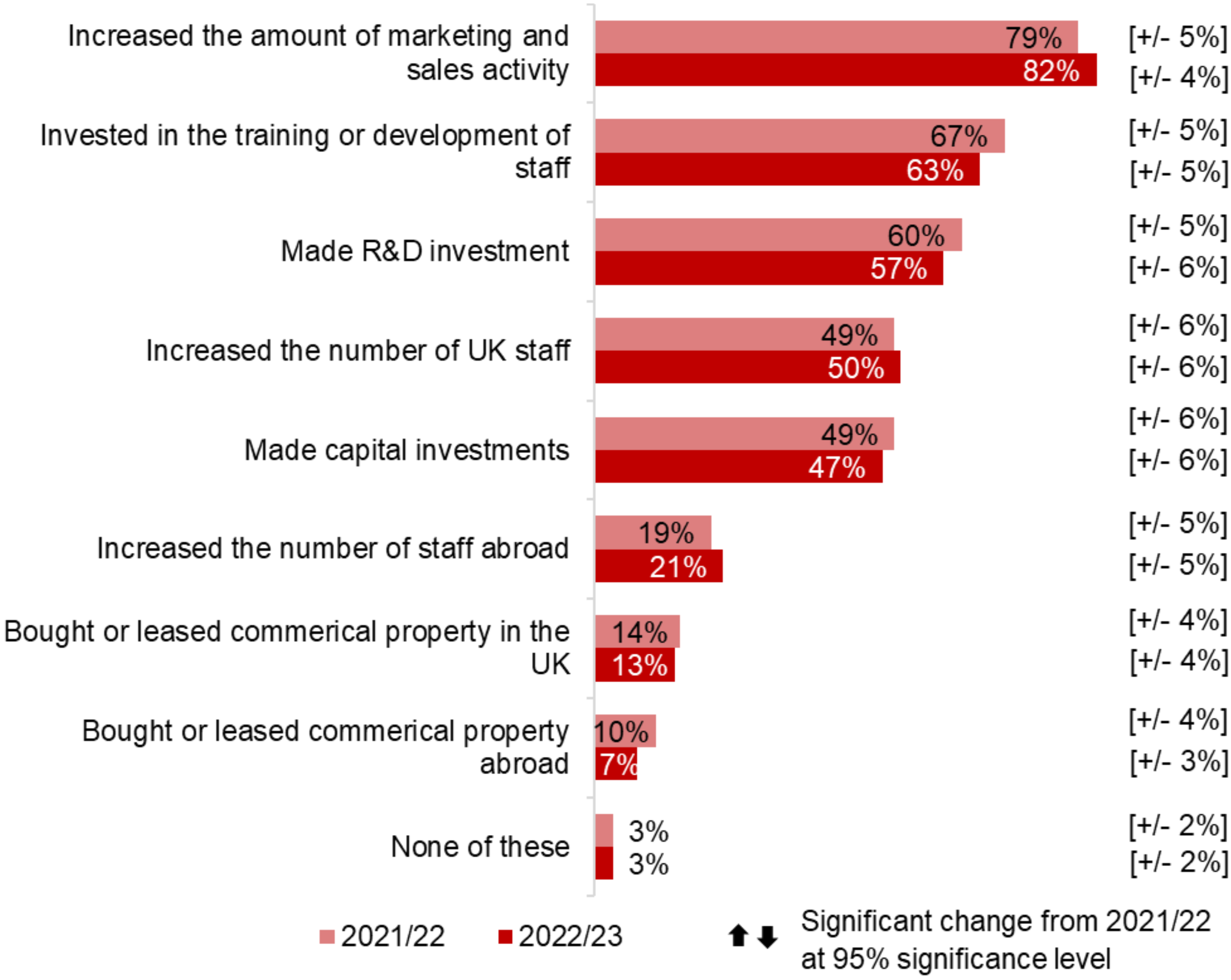


*Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All businesses who used the service who had identified a new business contact as part of the DBT service (n=893 (2021/22), n=855 (2022/23)). Only prompted codes are shown. * Codes split out in 2022/23.*

3.1.2.4 Making investments

Using the ITA service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the ITA service (37% overall), four in five (82%) said they had increased their marketing and sales activity, while three in five had invested in the training or development of staff (63%). A slightly smaller proportion had made a Research and Development investment (57%) and half increased the number of UK staff (50%) or made capital investments (47%). These findings remain unchanged compared to the previous two years. There were no statistically significant differences detected in the types of investment made by different types of exporter, due to small base sizes.

Chart 3.1.9 Type of investments made as a result of DBT service – ITAs

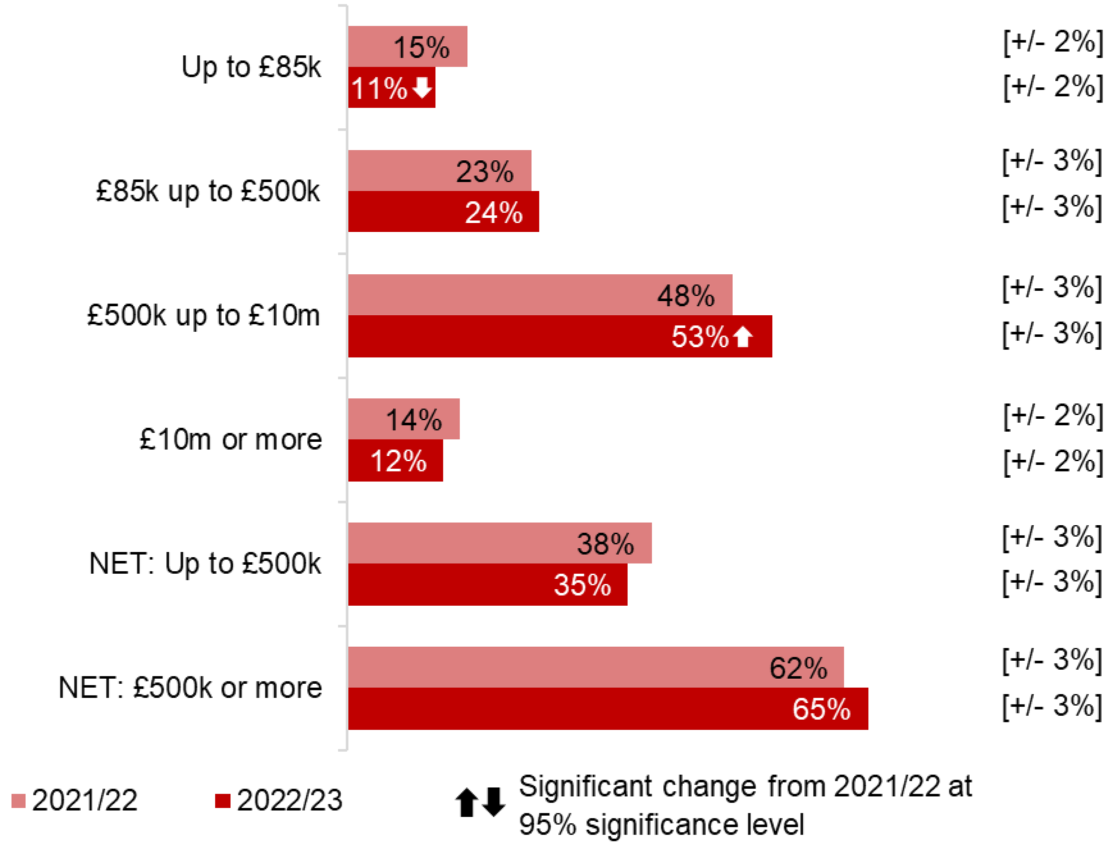


Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Base: All businesses who had used the service and had made investments to support exporting (n=438 (2021/22), n=433 (2022/23)). Only prompted codes are shown.

3.1.3 Service use by firmographics and export behaviour

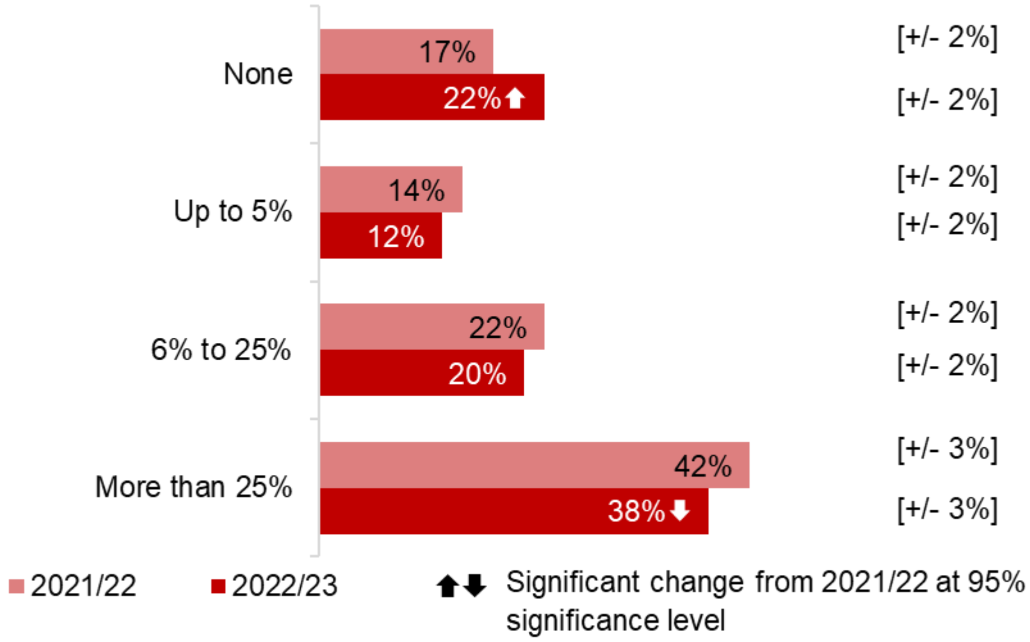
ITA service use was split between businesses with high turnovers of £500,000 or more (65%) and those with lower turnovers (35%), in line with the previous year. However, fewer businesses had a turnover of less than £85,000 compared to the previous year (11%, down from 15%), and more businesses had a turnover of between £500,000 and £9,999,999 (53%, up from 48%). Nearly two in five firms (38%) reported that more than a quarter of their turnover came from exporting, which was a decrease from the previous year (42% in 2021/22).

Chart 3.1.10 Turnover – ITAs



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational businesses)? Base: All businesses who used the service (excluding Don't know/Refused) (n=1,139 (2021/22), n=902 (2022/23)).

Chart 3.1.11 Proportion of turnover from exporting – ITAs

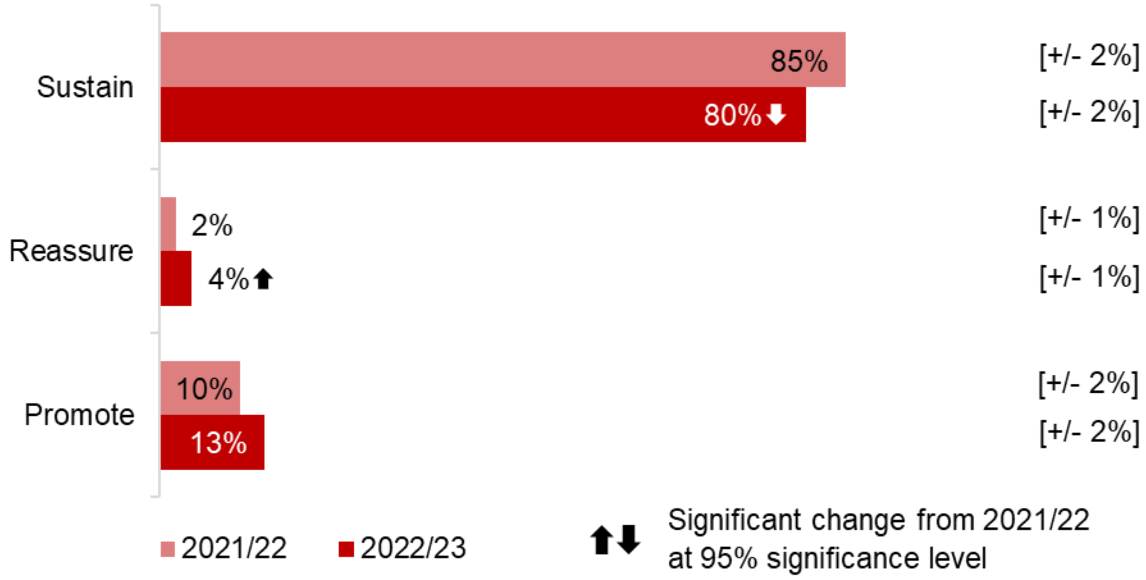


Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n=1,479 (2021/22), n=1,277 (2022/23)). 'Don't know' and 'Refused' responses not shown

Current exporters made up the majority of businesses using the ITA service, although they constituted a smaller proportion than in the previous year. Four in five businesses (80%) were currently exporting (classified as 'Sustain'), down from 85% in 2021/22. One in eight (13%) had never exported before (classified as 'Promote'), while 4% had exported before but not in the past 12 months (classified as 'Reassure'),[15] which was higher than the proportion in the previous year (2%).

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

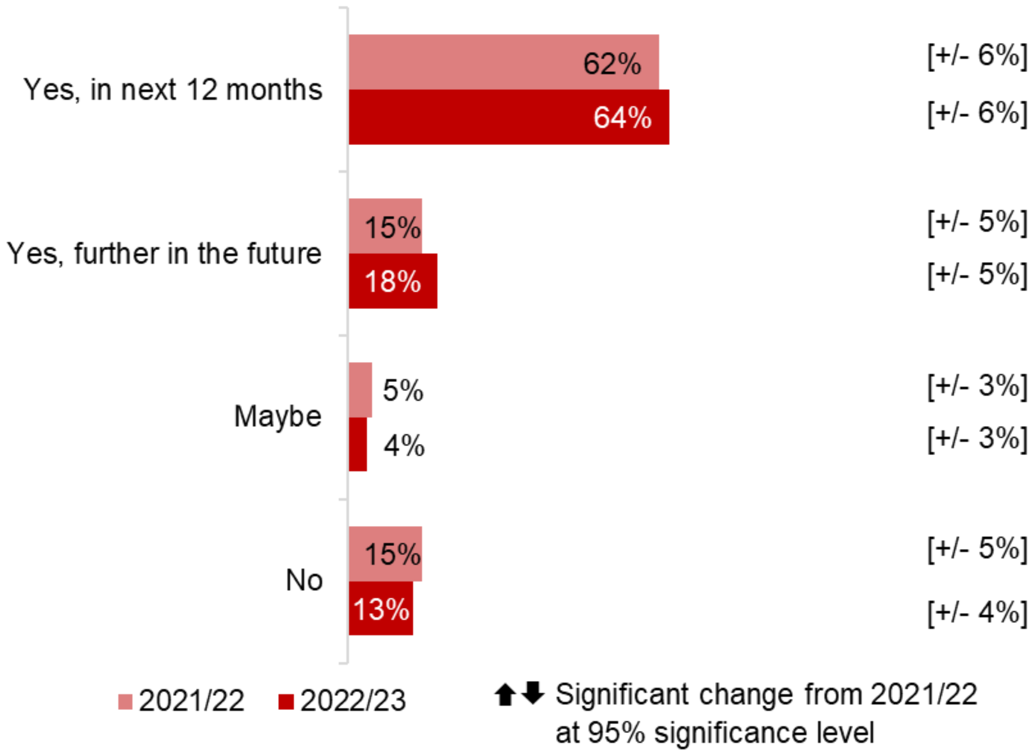
Chart 3.1.12 Exporter status – ITAs



Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n=1,479 (2021/22), n=1,277 (2022/23)).

Most former exporters using the ITA service had plans to export again. Two-thirds (64%) of those that were not currently exporting (but had done so previously), reported planning to export in the next 12 months. This was in line with the previous year.

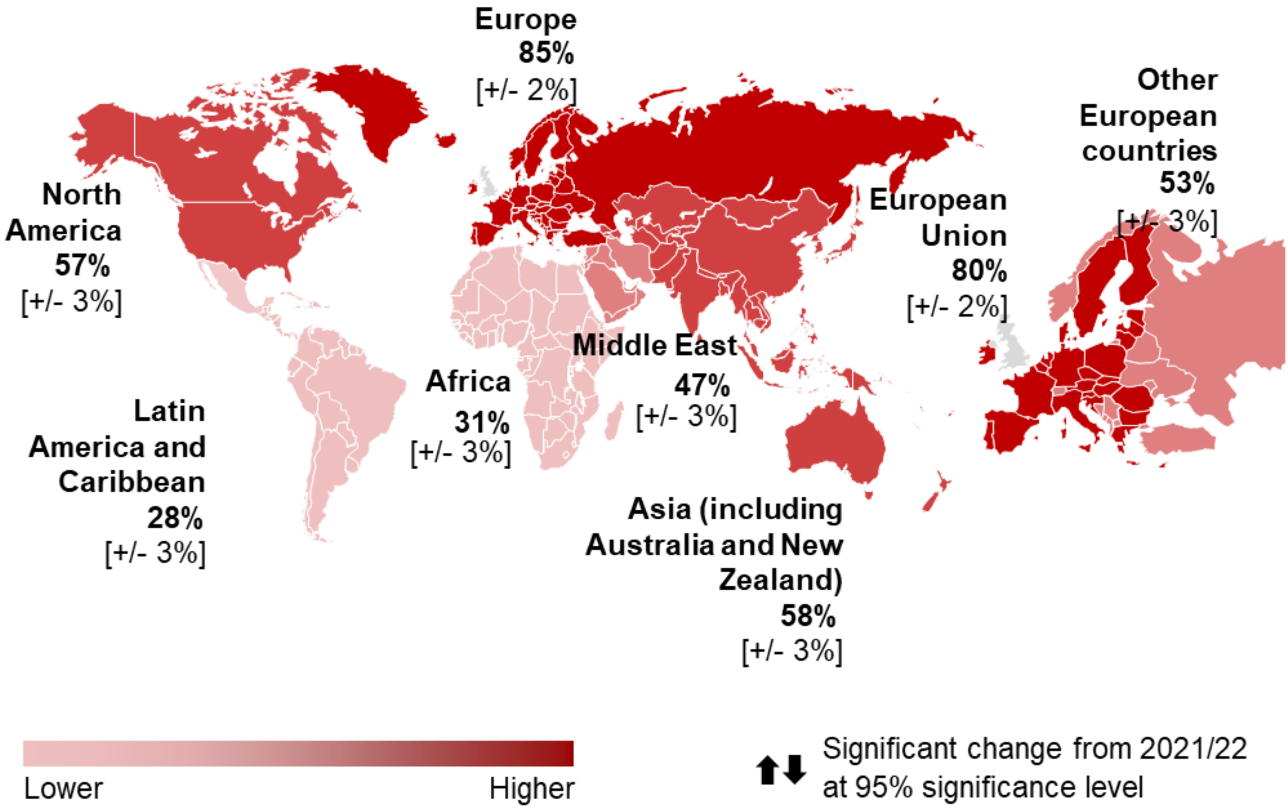
Chart 3.1.13 Non-exporter plans to sell overseas – ITAs



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All businesses who used the service and who are not currently exporting but have previously sold goods or services overseas (n=245 (2021/22), n=268 (2022/23)).

Europe remained the most common export market among ITA businesses (85%), in line with the previous two years. Among those that were currently exporting or had done so previously, four in five (80%) exported to the European Union, followed by Asia (58%) North America (57%) and non-EU European countries (53%). Over a quarter (28%) of those who were currently exporting (or had done so previously) had exported to Latin America and the Caribbean, making this region the least common export market among ITA users. These findings were all in line with the previous year.

Chart 3.1.14 Regions organisations export to or exported to previously – ITAs



Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n=1,288 (2021/22), n=1,081 (2022/23)).

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

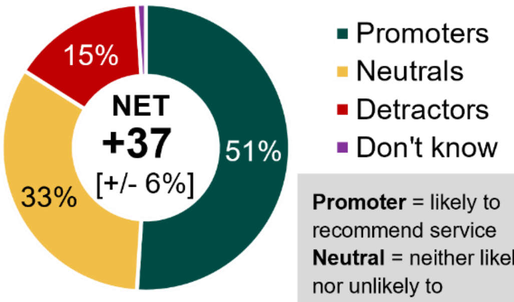
Region	% (21/22)	CI (+/-) (21/22)	% (22/23)	CI (+/-) (22/23)	Change
Europe	84%	2%	85%	2%	-
European Union	80%	2%	80%	2%	-
Other European countries	52%	3%	53%	3%	-
Asia (including Australia and New Zealand)	60%	3%	58%	3%	-
North America	56%	3%	57%	3%	-
Middle East	48%	3%	47%	3%	-
Africa	35%	3%	31%	3%	-
Latin America and the Caribbean	26%	3%	28%	3%	-

↑↓ Significant change from 2021/22 at 95% significance level

Qcurexp – Do you currently or did you export to any of the following regions? Base: All respondents who used the service and who have exported (n=1,288 (2021/22), n=1,081 (2022/23)).

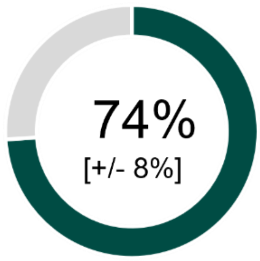
Summary: Missions

Net Promoter Score

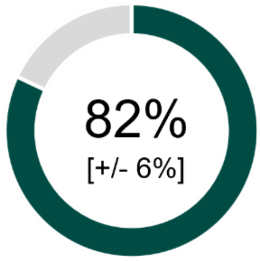


Promoter = likely to recommend service
Neutral = neither likely nor unlikely to recommend service
Detractor = unlikely to recommend service

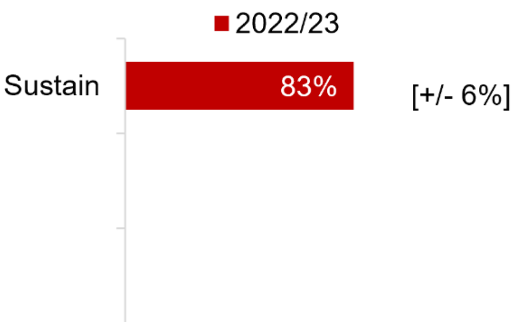
Overall service met needs



Satisfaction with service



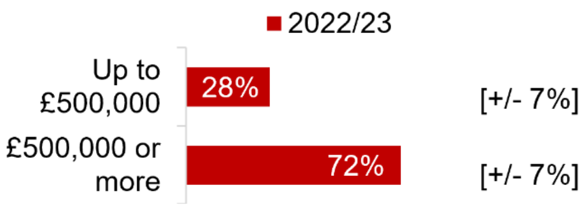
Exporter status



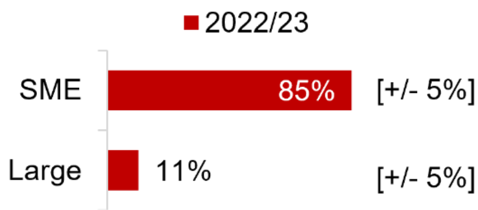
Sustain = current exporters
Reassure = exported before but not in the last 12 months
Promote = not exported before

⬆⬇ Significant change from 2021/22 at 95% significance level

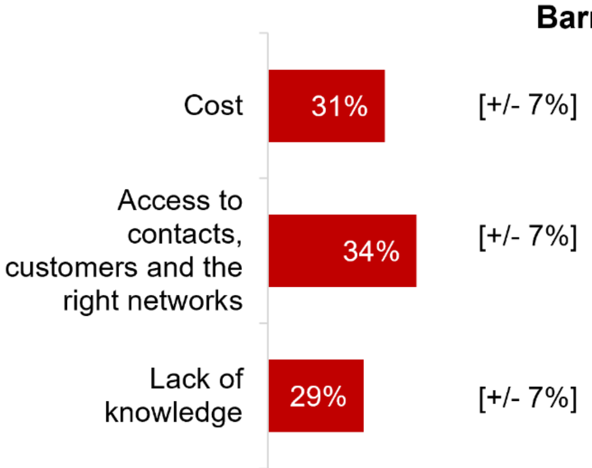
Turnover

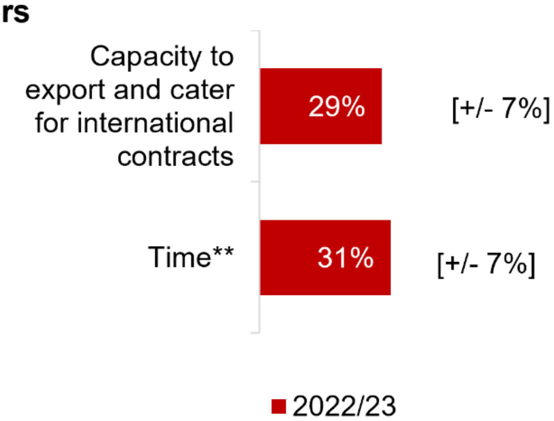


Size



Barriers





Base: All businesses who used the service (n= (2021/22), n=195 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=* (2021/22), n=190 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=* (2021/22), n=190 (2022/23)); Exporter status (n=* (2021/22), n=195 (2022/23)); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=* (2021/22), n=151 (2022/23)); Size - All businesses who used the service (n=* (2021/22), n=195 (2022/23)); Barriers - All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=* (2021/22), n=193 (2022/23)), Cost (n=* (2021/22), n=192 (2022/23), Lack of knowledge (n=* (2021/22), n=192 (2022/23)), Capacity to export (n=* (2021/22), n=192 (2022/23)), Time (n=190). ** Code added in 2022/23. Note small base in 2021/22. * Redacted due to small base size.*

3.2 Missions

Missions are services related to events (trade fairs and market research) but with a specific focus on face-to-face deal-making. Inward missions are where groups from outside the UK are brought in for events or meetings. Outward missions are where groups from inside the UK are taken overseas for events or meetings.

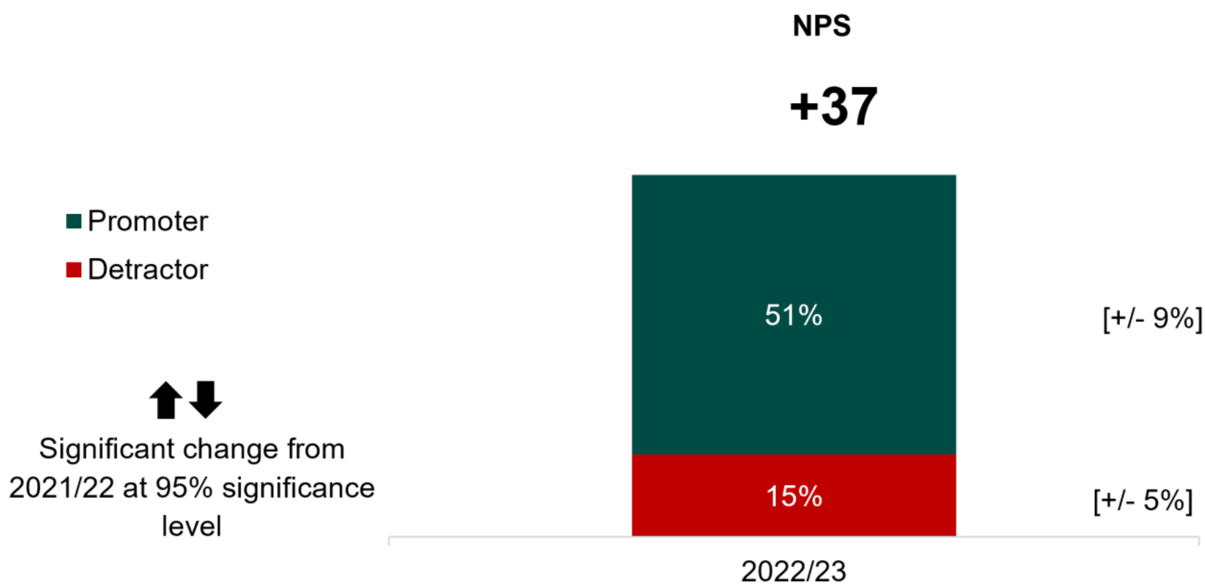
This chapter explores satisfaction with the Missions service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 195 businesses that used Missions between April 2022 and March 2023. There are no year-on-year comparisons with the previous reporting year due to small base size.

3.2.1 Satisfaction with the Missions service

3.2.1.1 Service performance

Overall, businesses were positive about the Missions service. Half of respondents (51%) were 'Promoters', i.e. likely to recommend the service to colleagues and business associates, which was consistent with the previous year. One in seven (15%) were 'Detractors', i.e. unlikely to recommend the service.[16] These findings were in line with the previous year.

Chart 3.2.1 Likelihood of recommending service (NPS) – Missions



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 who used the service (n= (2021/22), n=195(2022/23)). 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size.*

Businesses felt that the service **could be improved** by providing more communication or information (17%), having support that was more tailored or relevant to their industry or sector (13%), by increasing networking opportunities (11%), or providing better quality

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

information (11%). A fifth of businesses (21%) could not think of any ways in which the service could be improved, and 15% said they did not know. These findings were in line with the previous year.

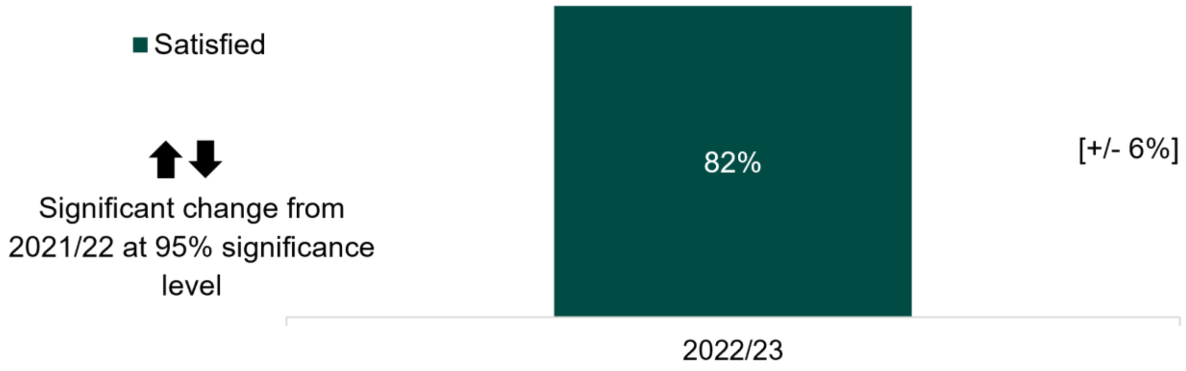
3.2.1.2 Satisfaction

Satisfaction with Missions remained high; over eight in ten respondents (82%) said they were satisfied with their experience, and just 2% said they were dissatisfied. Both of these results were in line with the previous year.[17]

The businesses that were dissatisfied with the service (i.e. they rated the service as poor) were asked the **reasons for their dissatisfaction.** The service not meeting expectations, not giving enough information or advice, and there not being follow up were each mentioned. Other responses mentioned included, advice being relevant to different types of business, not knowing what to do after dealing with DBT, being referred to a service that was not relevant to the business' needs, and the service being poorly organised or having a bad format.

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

Chart 3.2.2 Satisfaction with service – Missions

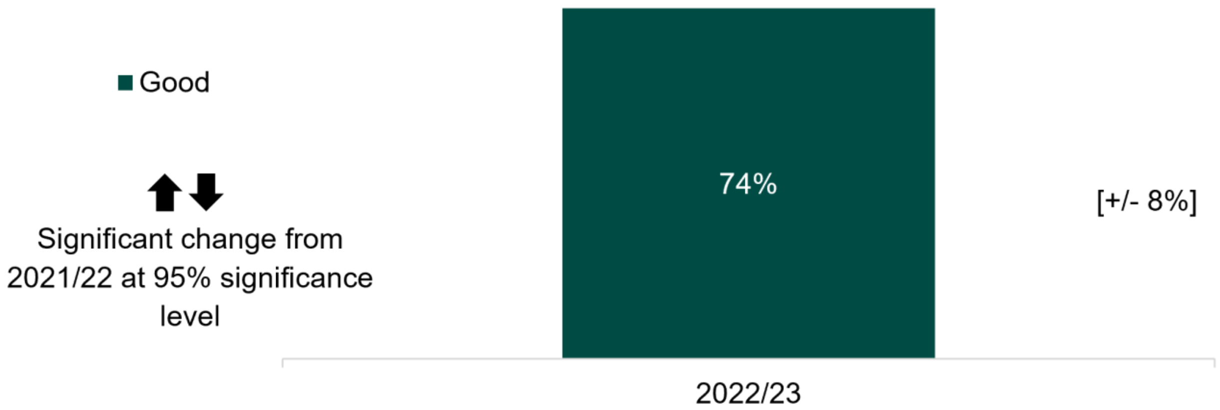


Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n= (2021/22), n=190 (2022/23)). 'Dissatisfied', 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size*

3.2.1.3 Whether overall service met needs

Businesses were likely to say that the Missions service had met their needs. Three-quarters (74%) rated the service as good overall.

Chart 3.2.3 Rating of whether overall service met needs – Missions

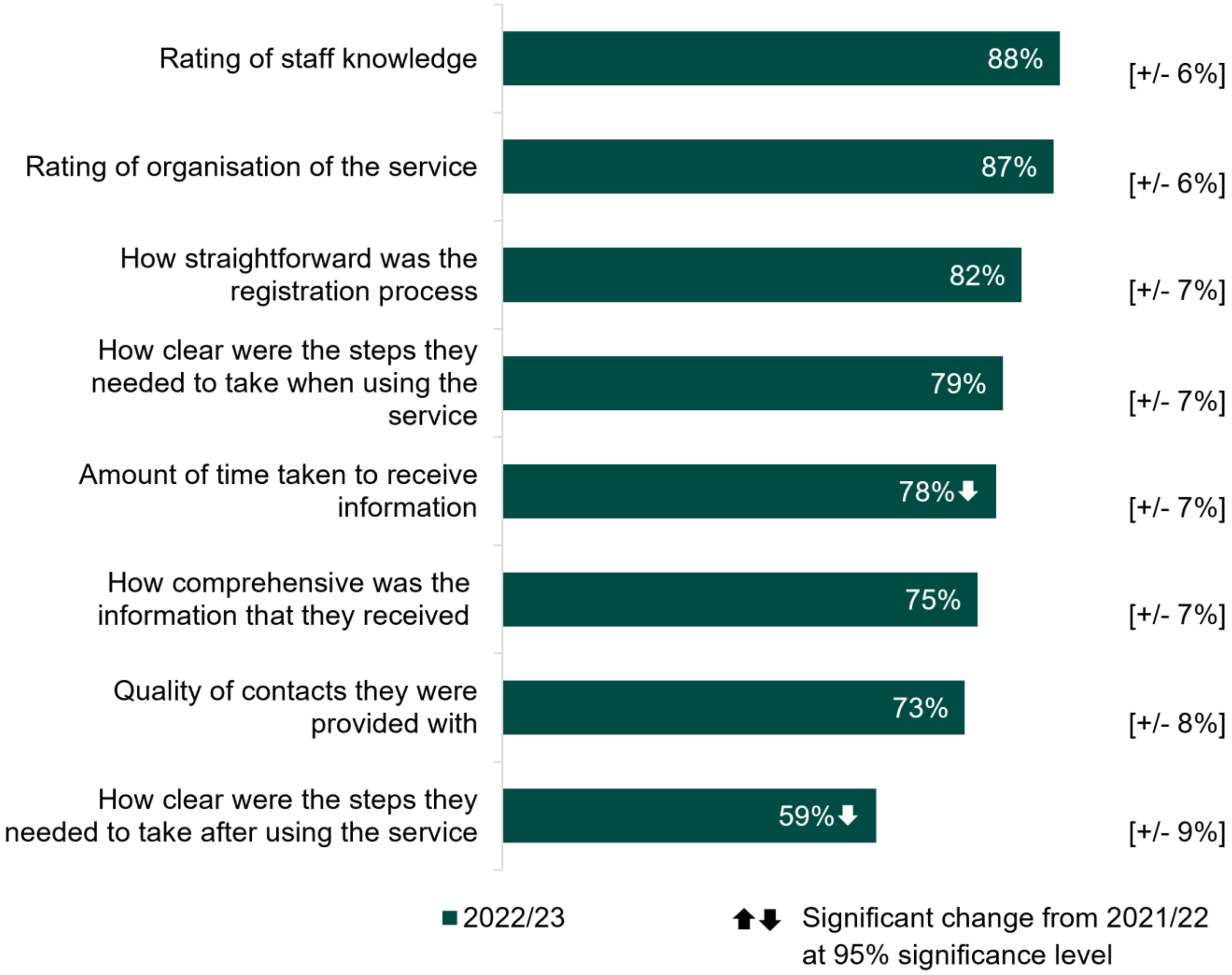


Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n= (2021/22), n=190 (2022/23)). 'Poor', 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size.*

Businesses were also positive about the ways in which the service had met their needs. They were most positive about the levels of staff knowledge (88%) and the organisation of the service (87%). Over four in five businesses (82%) were also positive about the straightforwardness of the registration process.

Businesses were positive about the amount of time taken to receive information (78%), and 59% were positive about how clear the steps were they needed to take after using the service.

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



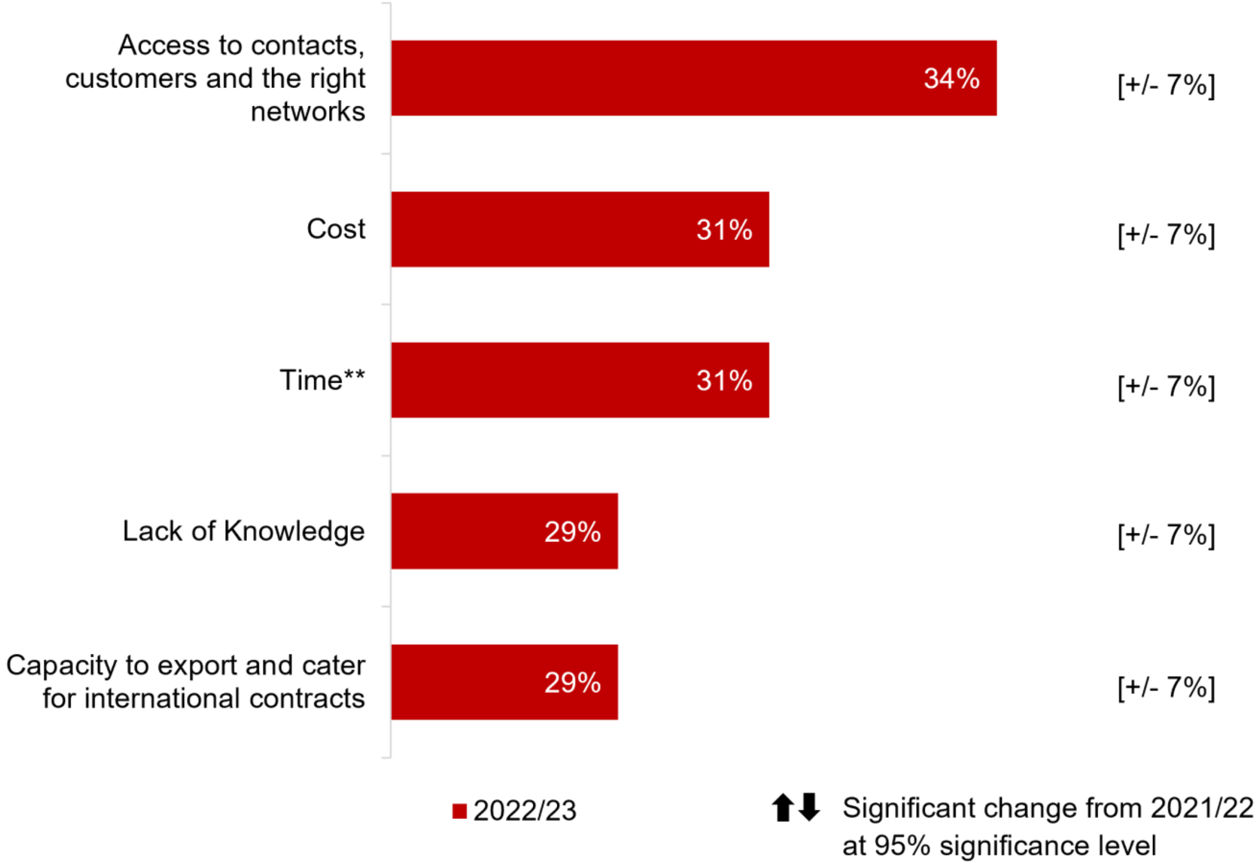
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n= (2021/22), n=183 (2022/23)). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=* (2021/22), n=175 (2022/23)). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=* (2021/22), n=179 (2022/23)). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from the service? (n=* (2021/22), n=185 (2022/23)). Qclarity_2 – The service made clear what I should do next after using it (n=* (2021/22), n=175 (2022/23)). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through the service? (n=* (2021/22), n=182 (2022/23)). Qreg – How straightforward was the registration process for the service? (n=* (2021/22), n=176 (2022/23)). Qevent – How would you rate the organisation of the service? (n=* (2021/22), n=178 (2022/23)). Base: All businesses who used the service (excluding 'not applicable' responses). 'Negative', 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size.*

3.2.2 Outcomes of using the Missions service

3.2.2.1 Counteracting the barriers to exporting

Businesses that had used the Missions service reported facing barriers to exporting. Around a third reported that access to contacts, customers and the right networks (34%), cost (31%), and time (31%) were barriers to exporting. A similar proportion reported that lack of knowledge (29%) and capacity to export and cater for international contracts (29%) were barriers to exporting.

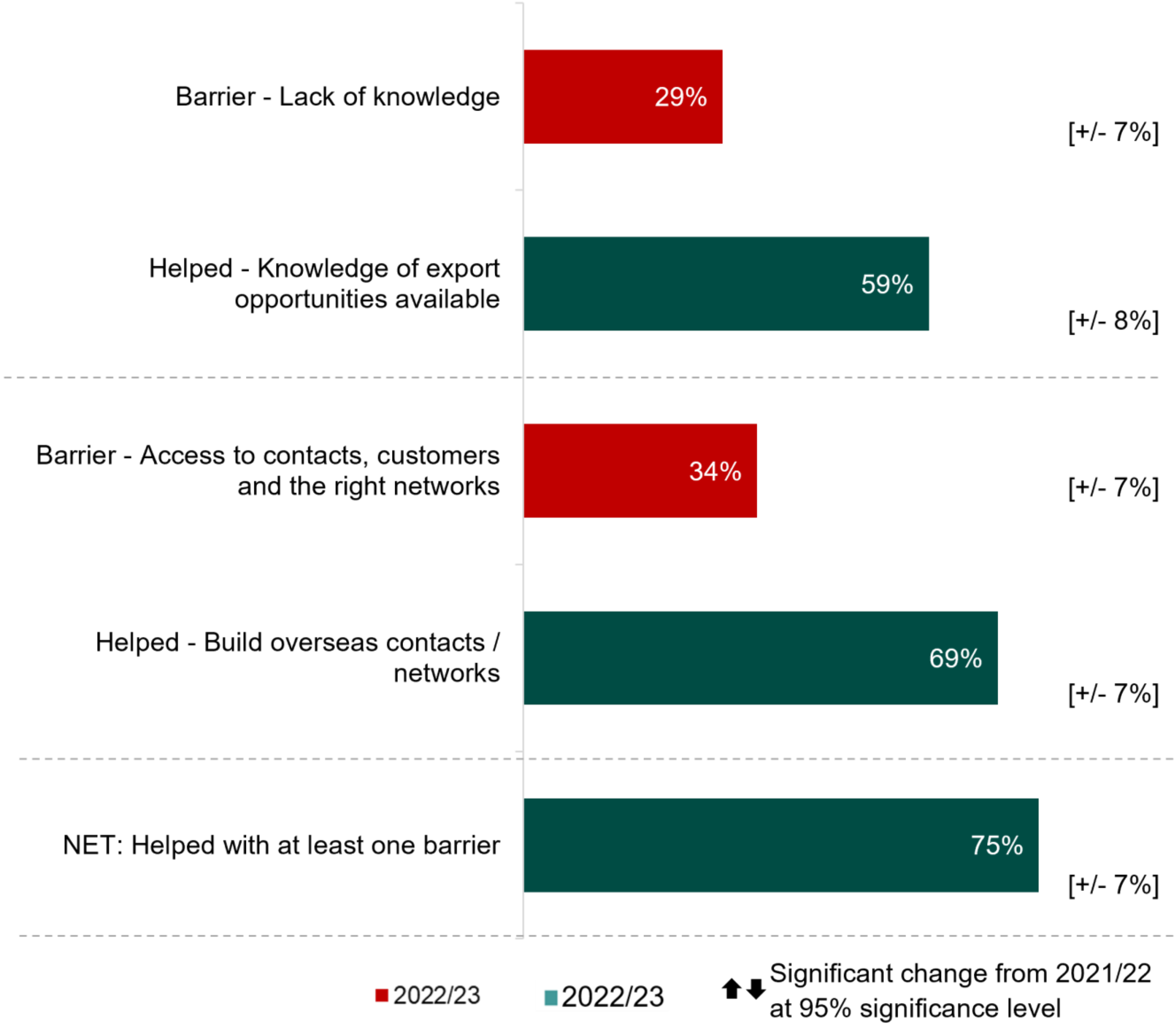
Chart 3.2.5 Barriers to exporting – Missions



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n= (2021/22), n=193 (2022/23)), Cost (n=* (2021/22), n=192 (2022/23)), Lack of knowledge (n=* (2021/22), n=192 (2022/23)), Capacity to export (n=* (2021/22), n=192 (2022/23)), Time (n=190 (2022/23). 'Neutral', 'Not a barrier' and 'Don't know' responses not shown. ** Code added in 2022/23. *Redacted due to small base size.*

Businesses were asked whether using Missions (and therefore DBT services) had helped them to **overcome these barriers** to exporting. Overall, around two-thirds of businesses reported that using Missions had helped them to build overseas contacts or networks (69%). Or to increase their knowledge of exporting opportunities that were available (59%).

Chart 3.2.6 Barriers to exporting and how DBT helped – Missions

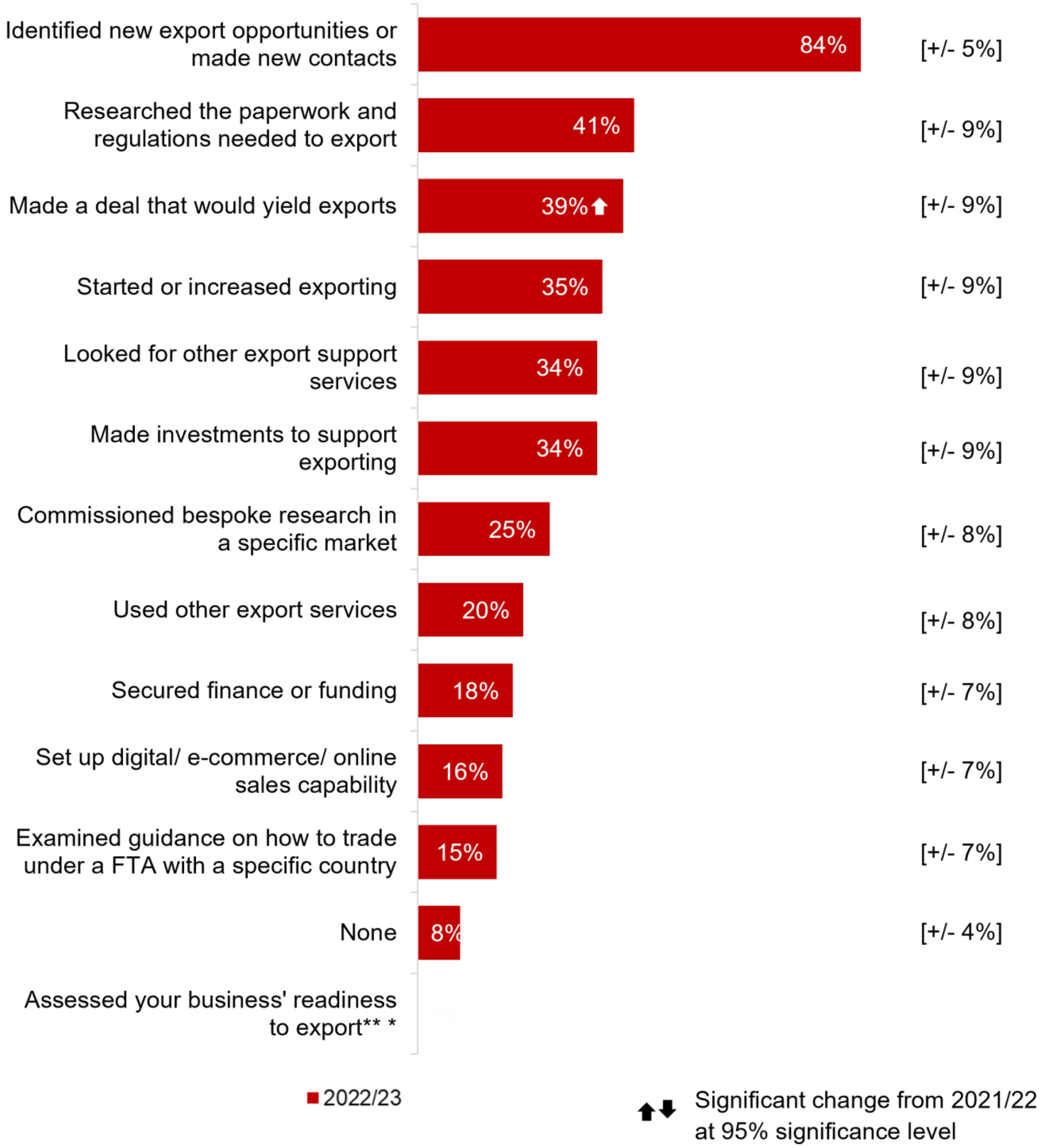


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n= (2021/22), n=193 (2022/23)), Lack of knowledge (n=* (2021/22), n=192 (2022/23)), Capacity to export (n=* (2021/22), n=192 (2022/23)). * Redacted due to small base size.*
Qknowchange – Using the same scale as before, thinking about your experience of the service, to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks / understand how to assess capacity and readiness to export? Base: All businesses who used the service (n= (2021/22), n=195 (2022/23)). * Redacted due to small base size.*

3.2.2.2 Taking action

Businesses had taken a range of actions as a result of using Missions. Over half of businesses (53%) that were not exporting at the time of using the service, had assessed the business' readiness to export. Among all businesses, eight in ten (84%) said they had identified new export opportunities or made new contacts, making this the most taken action. Around two in five businesses had researched the paperwork and regulations needed to export (41%) or made a deal that would yield exports (39%).

Chart 3.2.7 Actions taken as a result of service interaction – Missions

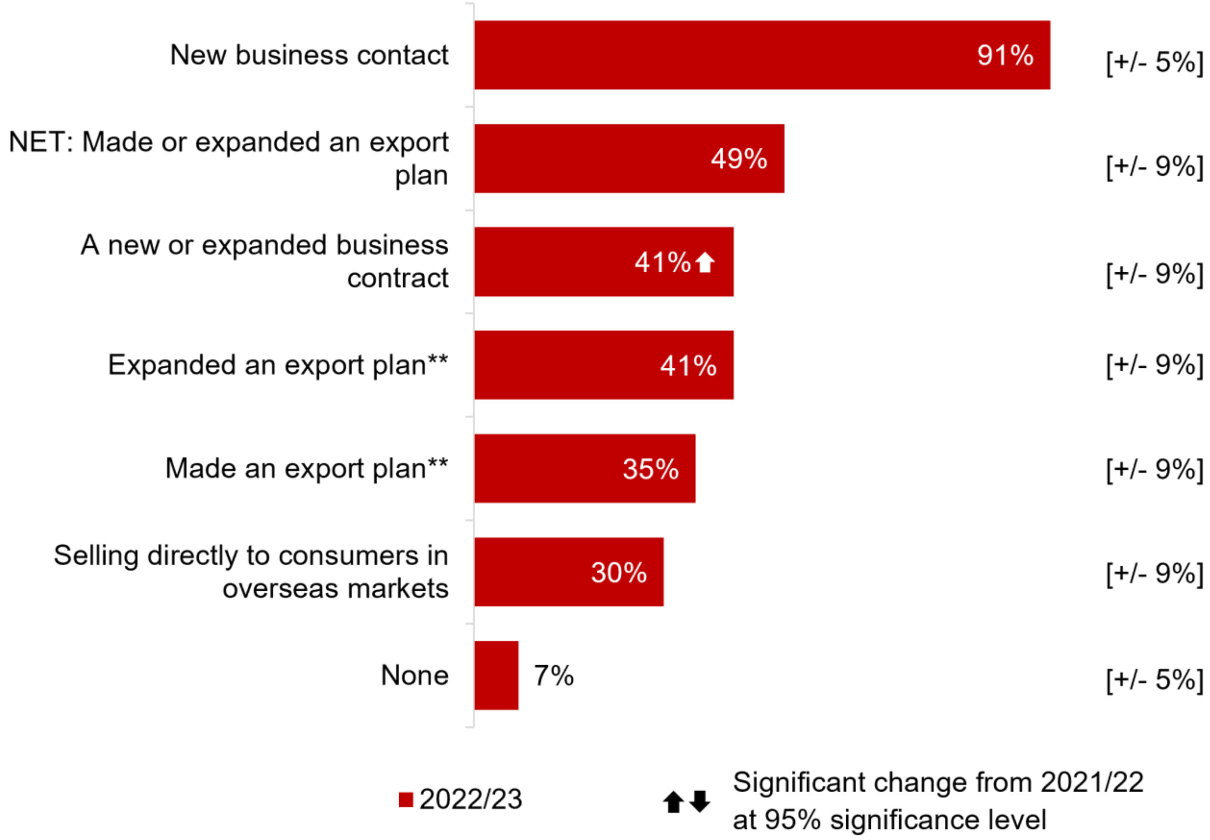


Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n= (2021/22), n=195 (2022/23)); Non-exporters (n=* (2021/22), n=* (2022/23)). Only prompted codes are shown. **Asked to non-exporters only. * Redacted due to small base size.*

3.2.2.3 Identifying new opportunities

As a result of using Missions, businesses reported identifying new potential export opportunities. Of those who identified opportunities, the most common was identifying new business contacts (91%), followed by making or expanding an export plan (49%).Two in five (41%) of these businesses reported they had made a new business contract or expanded an existing one as a result of using Missions.

Chart 3.2.8 Opportunities identified as a result of service interaction – Missions

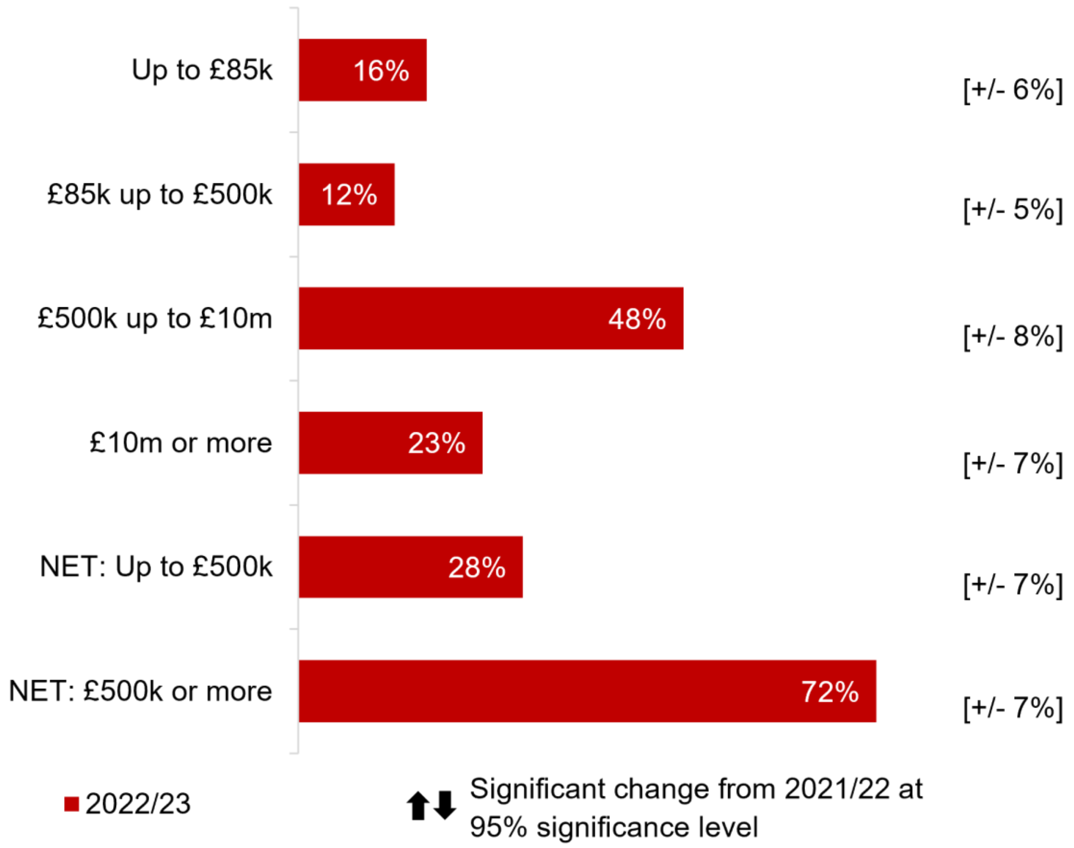


Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All businesses who used the service who had identified a new business contact as part of the DBT service (n= (2021/22), n=166 (2022/23)). Only prompted codes are shown. ** Codes split out in 2022/23. * Redacted due to small base size.*

3.2.3 Service use by firmographics and export behaviour

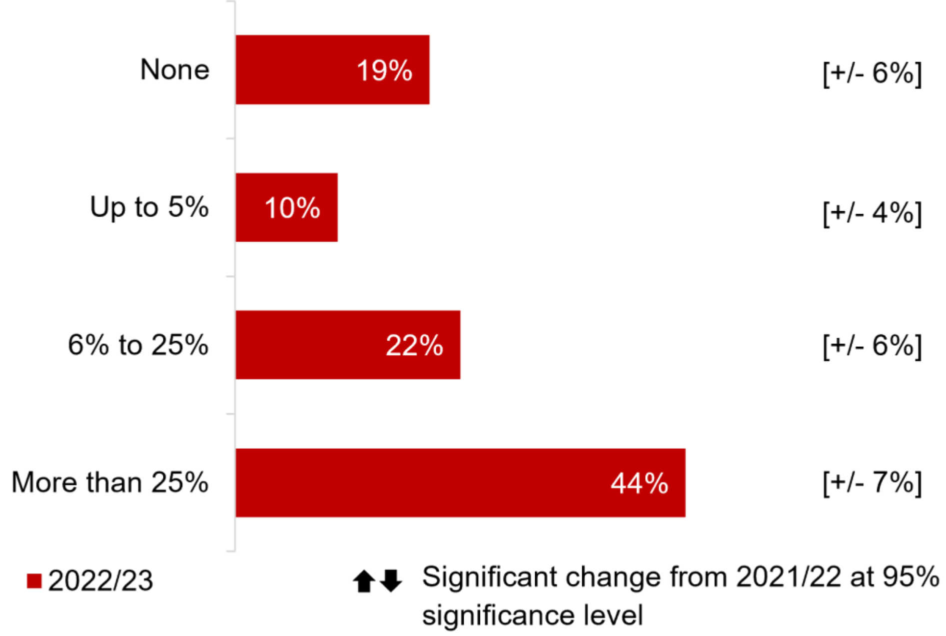
Around seven in ten of businesses (72%) that used Missions had high turnovers of £500,000 or more, compared with a quarter (28%) with lower turnovers. Over two in five businesses (44%) reported that more than a quarter of their turnover came from exporting, whereas around fifth of businesses (19%) said they had no turnover from exporting.

Chart 3.2.9 Turnover – Missions



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational businesses)? Base: All businesses who used the service (excluding Don't know/Refused) (n= (2021/22), n=151 (2022/23)). * Redacted due to small base size.*

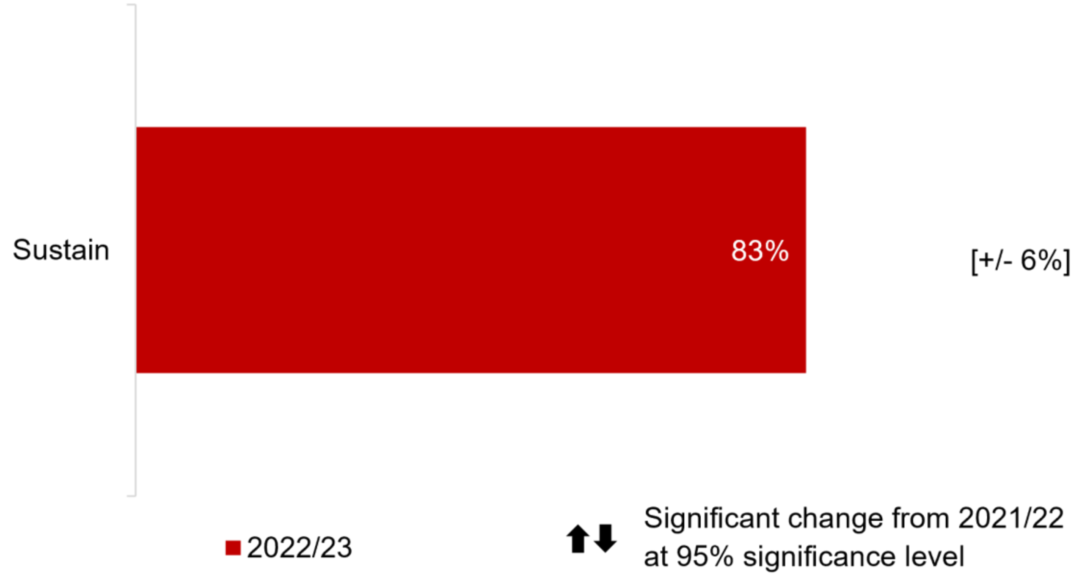
Chart 3.2.10 Proportion of turnover from exporting – Missions



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n= (2021/22), n=195 (2022/23)). 'Don't know' and 'Refused' responses not shown. * Redacted due to small base size.*

Current exporters made up the majority of businesses using the Missions service. Four in five businesses (83%) were currently exporting (classified as 'Sustain').

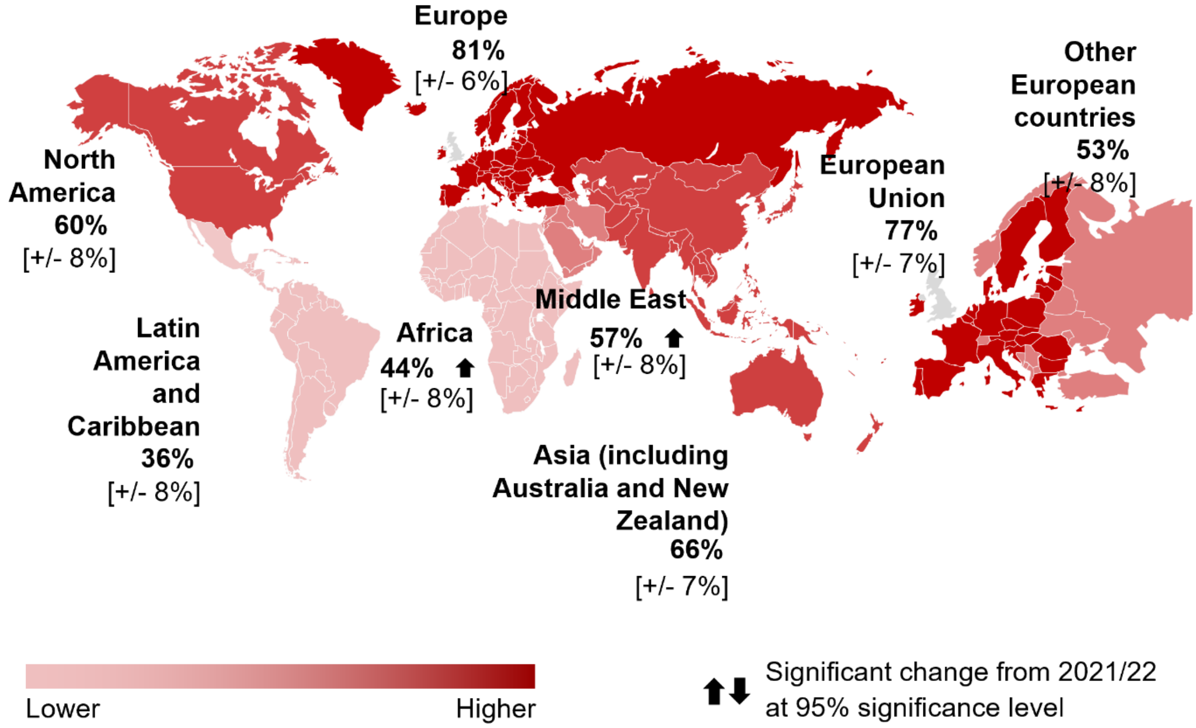
Chart 3.2.11 Exporter status – Missions



Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n= (2021/22), n=195 (2022/23)). * Redacted due to small base size. 'Promote' and 'Reassure' are not shown.*

Europe remained the most common export market among Missions businesses. Among those who were currently exporting or had done so previously, around three-quarters (77%) exported to the European Union, compared with two thirds that exported to Asia (66%) and three in five that exported to North America (60%) or the Middle East (57%). More businesses exported to the Middle East (57%) and Africa (44%) compared to the previous year.

Chart 3.2.12 Regions organisations export to or exported to previously – Missions



Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n= (2021/22), n=166 (2022/23)). * Redacted due to small base size.*

Table 3.2.1 Regions organisations export to or exported to previously – Missions

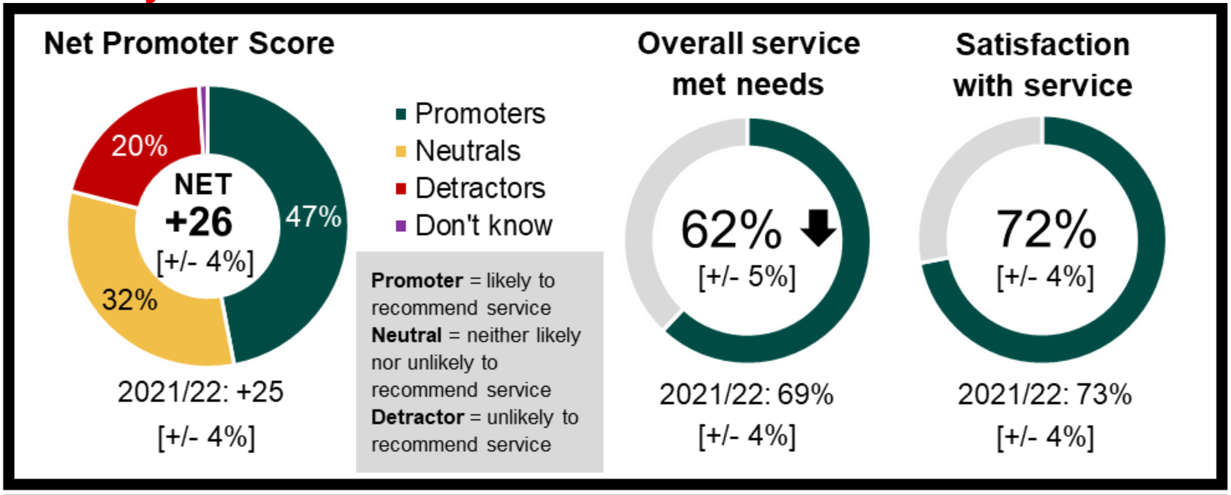
Region	% (21/22)	CI (+/-) (21/22)	% (22/23)	CI (+/-) (22/23)	Change
Europe	c	c	81%	6%	-
European Union	c	c	77%	7%	-
Other European countries	c	c	53%	8%	-
Asia (including Australia and New Zealand)	c	c	66%	7%	-
North America	c	c	60%	8%	-
Middle East	c	c	57%	8%	↑
Africa	c	c	44%	8%	↑
Latin America and Caribbean	c	c	36%	8%	-

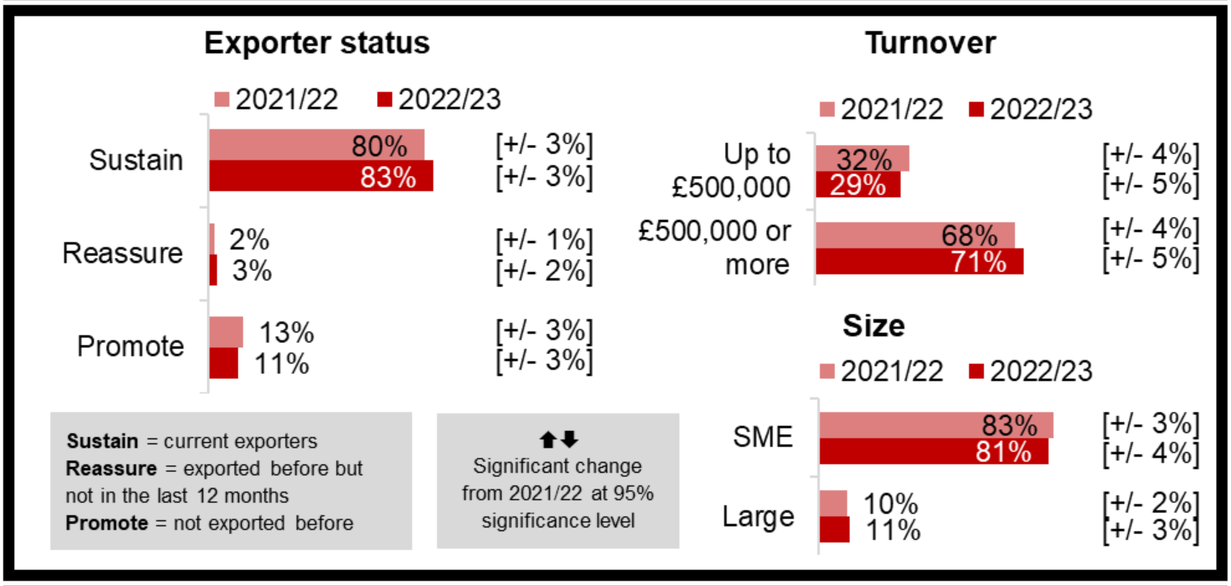
c Cells have been suppressed to protect confidentiality

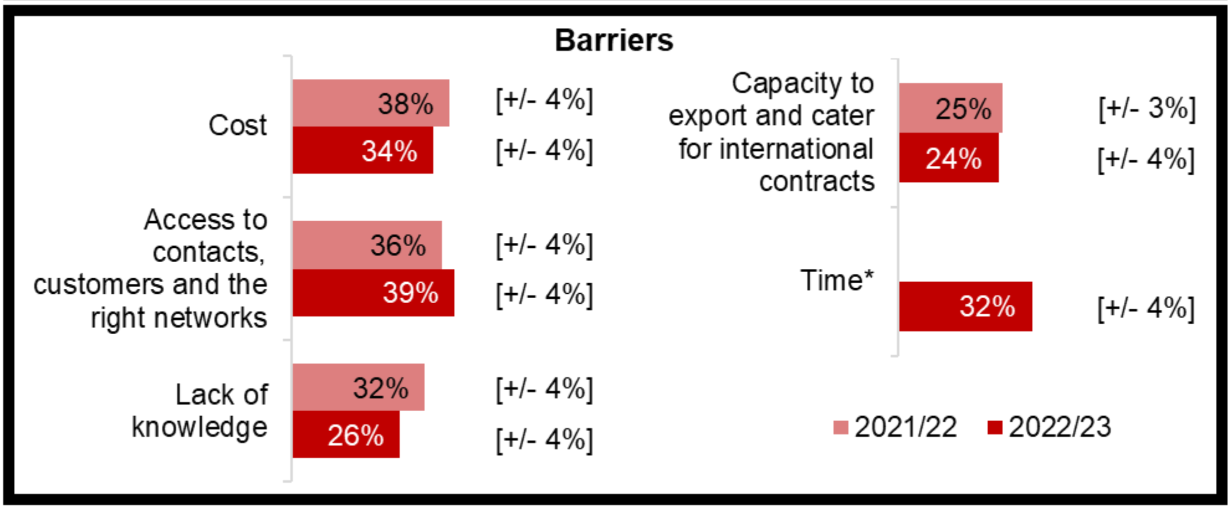
↑↓ Significant change from 2021/22 at 95% significance level

Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n= (2021/22), n=166 (2022/23)). * Redacted due to small base size.*

Summary: Posts







*Base: All businesses who used the service (n=685 (2021/22), n=509 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=661 (2021/22), n=489 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=665 (2021/22), n=500 (2022/23)); Exporter status (n=685 (2021/22), n=509 (2022/23)); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=456 (2021/22), n=350 (2022/23)); Size - All businesses who used the service (n=685 (2021/22), n=509 (2022/23)); Barriers - All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=674 (2021/22), n=502 (2022/23)), Cost (n=664 (2021/22), n=497 (2022/23), Lack of knowledge (n=671 (2021/22), n=498 (2022/23)), Capacity to export (n=668 (2021/22), n=496 (2022/23)), Time (n=489). * Code added in 2022/23.*

3.3 Posts

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

This chapter explores satisfaction with the Posts service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 509 businesses who used Posts between April 2022 and March 2023.

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

Key changes since 2021/22:

Businesses were less likely to say that the overall Posts service had met their needs than in the previous year; around six in ten (62%) rated it as good overall (compared to 69% in 2021/22). Posts users were also less likely to be positive about staff knowledge (80% compared to 85% in 2021/22) and the organisation of the service (78% compared to 86% in 2021/22).

More businesses had taken action as a result of using Posts in 2022/23. Specifically, businesses were more likely to say they had used other export services (17% compared to 12% in 2021/22) or secured finance or funding (13% compared to 8% in 2021/22).

However, Posts users were less likely to have made investments to support new or increased export opportunities. Specifically, businesses were less likely to have increased their marketing and sales activity (79% compared to 89% in 2021/22), increased the number of UK staff (46% compared to 67% in 2021/22) or increased the number of staff abroad (26% compared to 45% in 2021/22).

Lack of knowledge was less likely to be perceived as a barrier this year (26% compared to 32% in 2021/22).

3.3.1 Satisfaction with the Posts service

3.3.1.1 Service performance

Businesses gave a somewhat positive response overall as to whether they would recommend the Posts service to colleagues and business associates. Just under half of respondents (47%) were 'Promoters', i.e. likely to recommend the service, and one in five (20%) were 'Detractors', i.e. unlikely to recommend the service.[18] These findings were in line with the previous year, as was the Net Promoter Score ('Promoters' minus 'Detractors'), which was +26 this year (compared to +25 in 2021/22).

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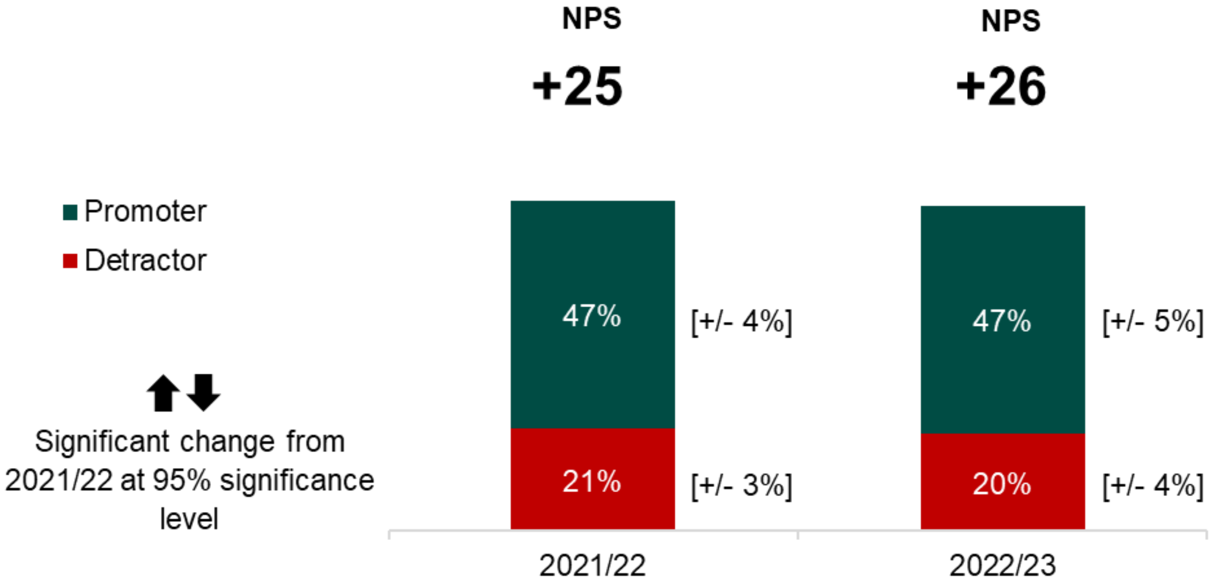
[18] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

Chart 3.3.1 Likelihood of recommending service (NPS) – Posts



Qlikrec – Based on your experiences of 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 who used the service (n=685 (2021/22), n=509(2022/23)). 'Neutral' and 'Don't know' responses not shown.

The likelihood of recommending this service was broadly consistent by region, and findings were in line with the previous year. This is shown in Table 3.3.1 below.

Table 3.3.1 Net Promoter Score for service by HMTC region

Region	NPS (21/22)	CI (+/-) (21/22)	Base (21/22)	NPS (22/23)	CI (+/-) (22/23)	Base (22/23)	Change
Overall	25	4%	685	26	4%	509	-
Europe	25	5%	308	23	6%	254	-
Eastern Europe and Central Asia	c	c	c	c	c	c	-
Middle East	c	c	c	c	c	c	-
Asia Pacific	c	c	c	c	c	c	-
Latin America and Caribbean	c	c	c	c	c	c	-
North America	c	c	c	c	c	c	-
Africa	c	c	c	c	c	c	-
China and Hong Kong	c	c	c	c	c	c	-
South Asia	c	c	c	c	c	c	-

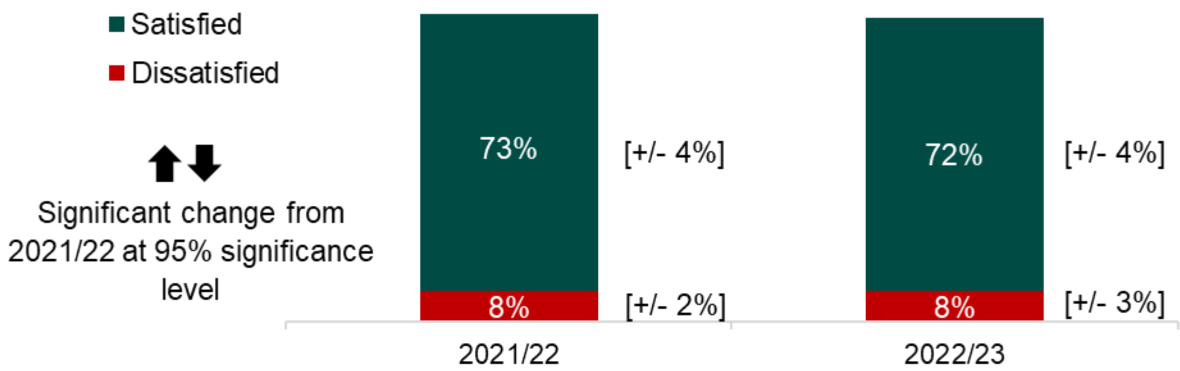
c Cells have been suppressed to protect confidentiality
↑↓ Significant change from 2021/22 at 95% significance level

Businesses felt that the service **could be improved** by having better support (33%) or communication (27%). Specifically, the most frequently suggested improvements for the service were more communication or information (15%), more sector or industry specific services (15%), better follow-up (14%), increased networking opportunities (11%) and more knowledgeable staff (10%).

3.3.1.2 Satisfaction

Satisfaction with Posts remained in line with last year. Almost three-quarters of respondents (72%) said they were satisfied with their experience (in line with 73% in 2021/22), while 8% said they were dissatisfied (in line with 2021/22).[19]

Chart 3.3.2 Satisfaction with service - Posts



Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n=665 (2021/22), n=500 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

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

Satisfaction was mostly consistent by region, as shown in Table 3.3.2.

Table 3.3.2 Satisfaction with service by HMTC region

Region	Satisfied (21/22)	CI (+/-) (21/22)	Base (21/22)	Satisfied (22/23)	CI (+/-) (22/23)	Base (22/23)	Change
Overall	73%	4%	665	72%	4%	500	-
Europe	72%	6%	302	70%	6%	252	-
Eastern Europe and Central Asia	c	c	c	c	c	c	-
Middle East	c	c	c	c	c	c	-
Asia Pacific	c	c	c	c	c	c	-
Latin America and Caribbean	c	c	c	c	c	c	-
North America	c	c	c	c	c	c	-
Africa	c	c	c	c	c	c	-
China and Hong Kong	c	c	c	c	c	c	-
South Asia	c	c	c	c	c	c	-

c Cells have been suppressed to protect confidentiality
↑↓ Significant change from 2021/22 at 95% significance level

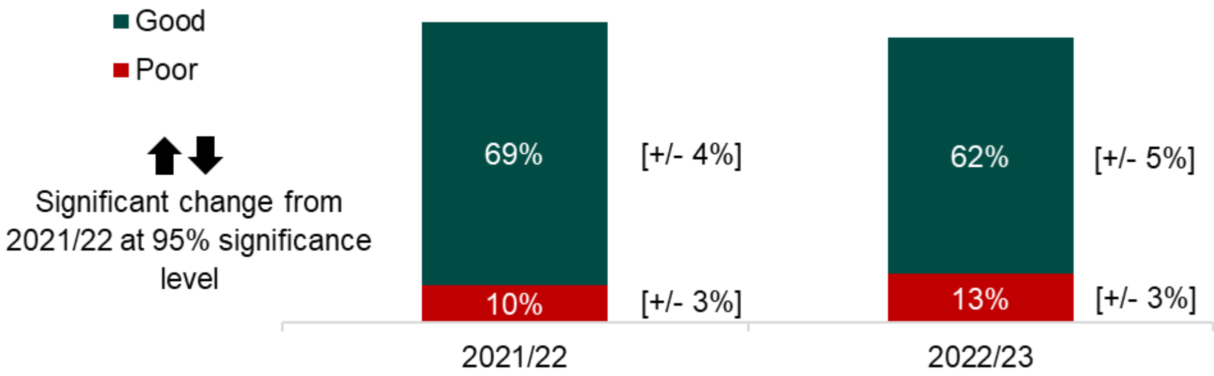
Of the businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reasons for dissatisfaction**[20] were feeling that the service did not give enough information or advice and that the service did not meet their expectations. Some felt that DBT did not have enough contact with their business, while a small few said there was a lack of follow-up or that they did not know what to do after dealing with DBT.

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

3.3.1.3 Whether overall service met needs

Businesses were less likely to say that the overall Posts service had met their needs than in the previous year; around six in ten (62%) rated it as good overall (compared to 69% in 2021/22). Around one in eight (13%) rated the service as poor, which was in line with the previous year.

Chart 3.3.3 Rating of whether overall service met needs – Posts



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n=661 (2021/22), n=489 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

Businesses were most positive about how straightforward the registration process was (81%), staff knowledge (80%), the organisation of the service (78%) and the amount of time taken to receive information (77%). These were followed by how clear the steps were that they needed to take when using the service (70%) and how comprehensive the information they received was (69%). They were less positive about the quality of contacts they were provided with (62%) and how clear the steps were after using the service (59%).[21]

Compared with the previous year, businesses were less likely to be positive about staff knowledge (80% compared to 85% in 2021/22) and the organisation of the service (78% compared to 86% in 2021/22).

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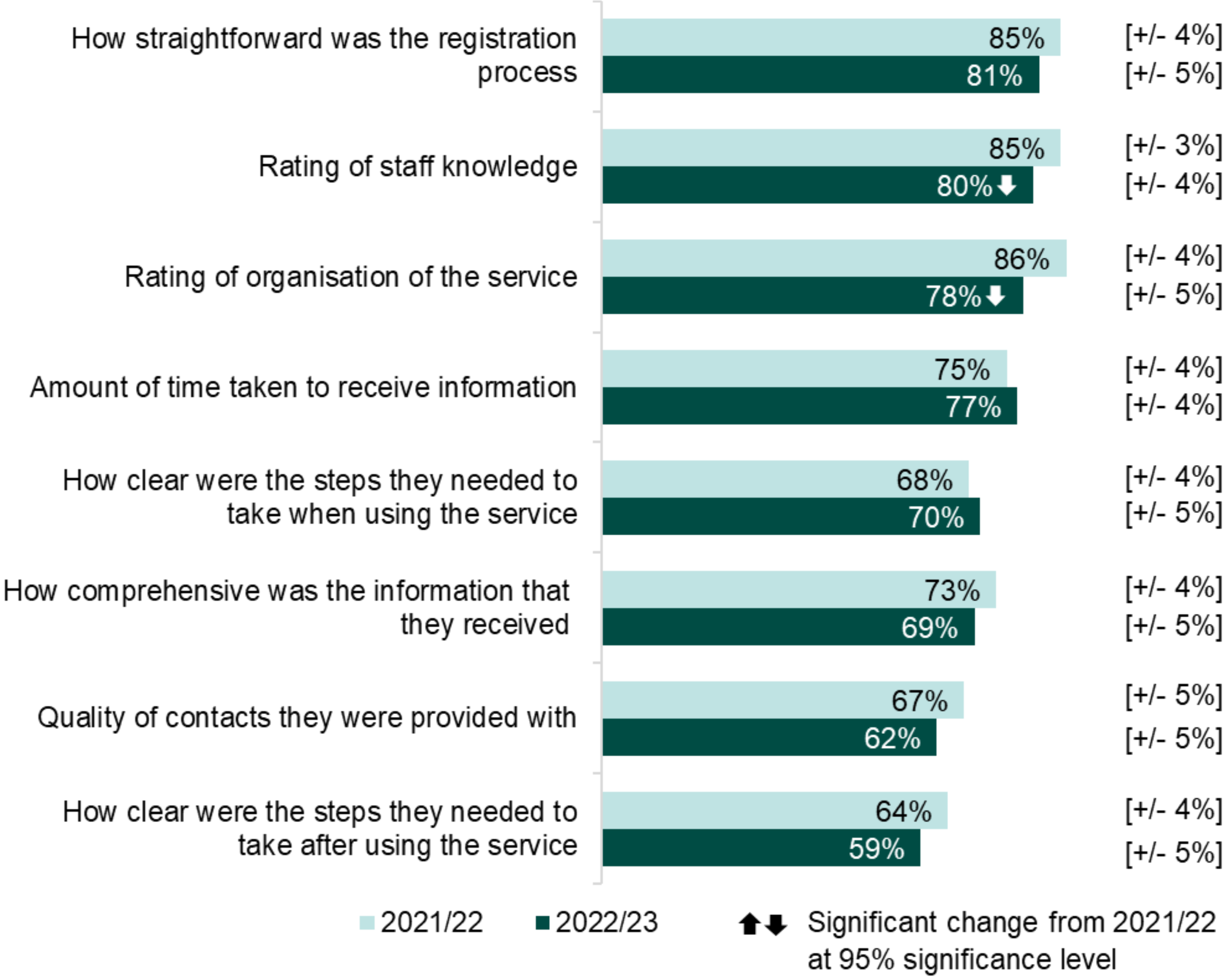
[21] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

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



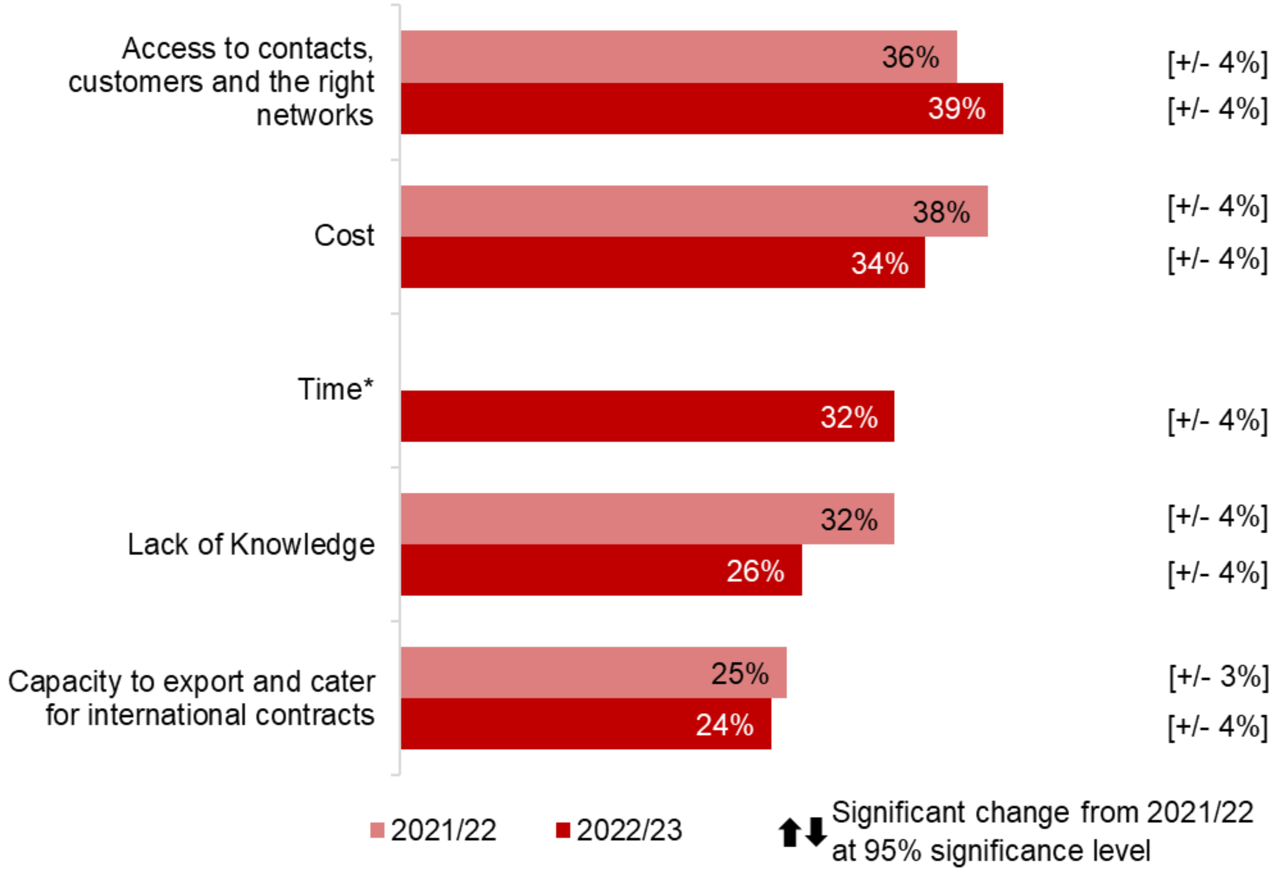
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=616 (2021/22), n=470 (2022/23)). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=645 (2021/22), n=483 (2022/23)). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=633 (2021/22), n=472 (2022/23)). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from the service? (n=637 (2021/22), n=471 (2022/23)). Qclarity_2 – The service made clear what I should do next after using it (n=624 (2021/22), n=465 (2022/23)). Qualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through the service? (n=581 (2021/22), n=436 (2022/23)). Qreg – How straightforward was the registration process for the service? (n=464 (2021/22), n=371 (2022/23)). Qevent – How would you rate the organisation of the service? (n=477 (2021/22), n=368 (2022/23)). Base: All businesses who used the service (excluding 'not applicable' responses). 'Negative', 'Neutral' and 'Don't know' responses not shown.

3.3.2 Outcomes of using the Posts service

3.3.2.1 Counteracting the barriers to exporting

Businesses that used the Posts service reported facing barriers to exporting. Two in five (39%) reported access to contacts, customers and the right networks as a barrier. A third (34%) reported cost as a barrier, and a similar proportion said that time was a barrier (32%). Around a quarter (26%) perceived lack of knowledge as a barrier, and a similar proportion (24%) said that capacity to export and cater for international contracts was a barrier. Businesses were less likely to report lack of knowledge as a barrier than last year (26% compared to 32% in 2021/22). Otherwise, the findings were in line with the previous year.

Chart 3.3.5 Barriers to exporting – Posts

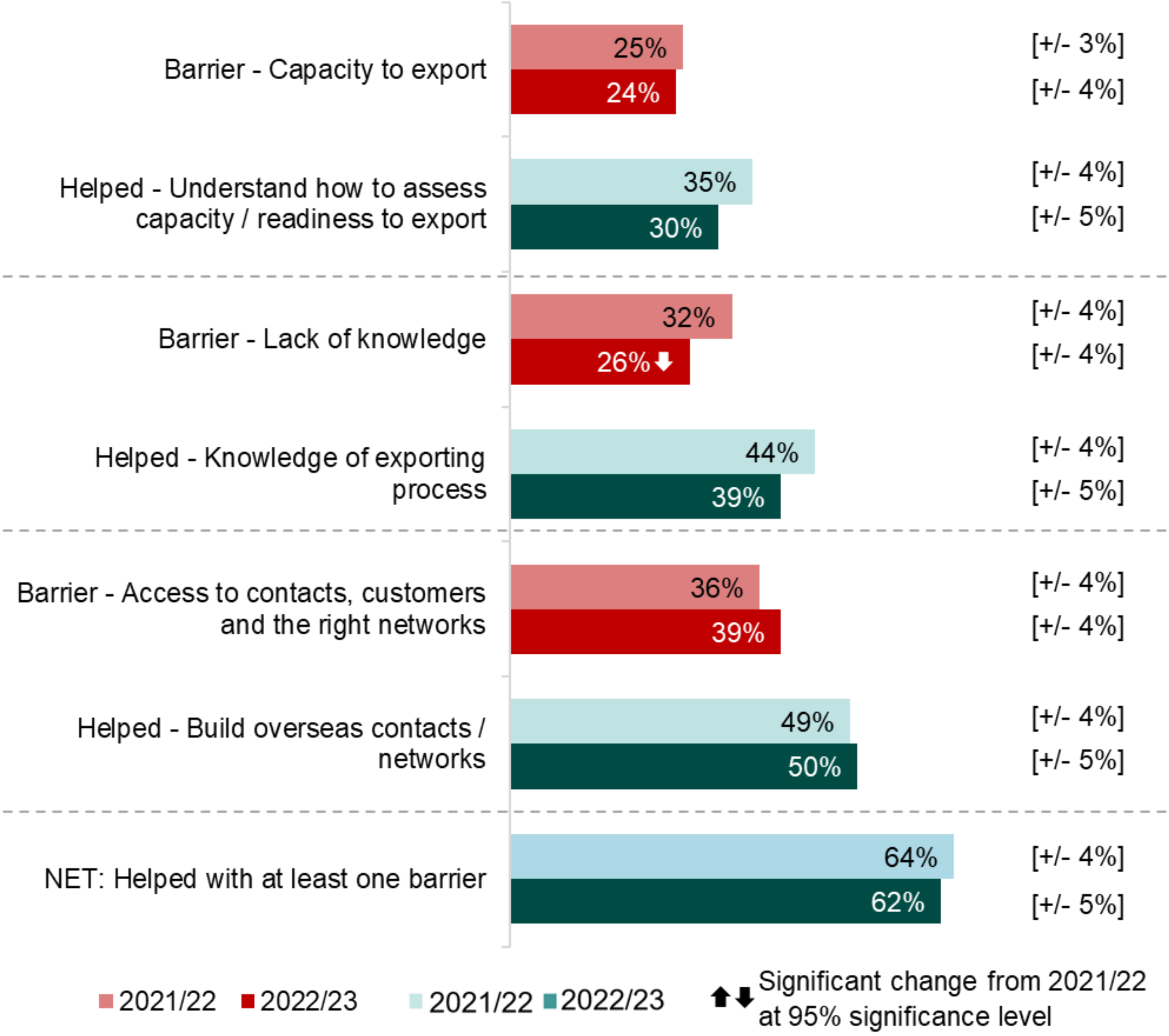


*Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=674 (2021/22), n=502 (2022/23)), Cost (n=664 (2021/22), n=497 (2022/23)), Lack of knowledge (n=671 (2021/22), n=498 (2022/23)), Capacity to export (n=668 (2021/22), n=496 (2022/23)), Time (n=489). 'Neutral', 'Not a barrier' and 'Don't know' responses not shown. * Code added in 2022/23.*

Capacity to export and cater for international contracts was perceived to be more of a barrier for micro (29%) and small businesses (26%) than medium-sized businesses (13%).

Businesses were asked whether using Posts (and therefore DBT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using Posts had helped them to build overseas contacts or networks (50%), understand how to increase their knowledge of the exporting process (39%) or to assess their capacity and readiness to export (30%). These findings were in line with the previous year.

Chart 3.3.6 Barriers to exporting and how DBT helped – Posts



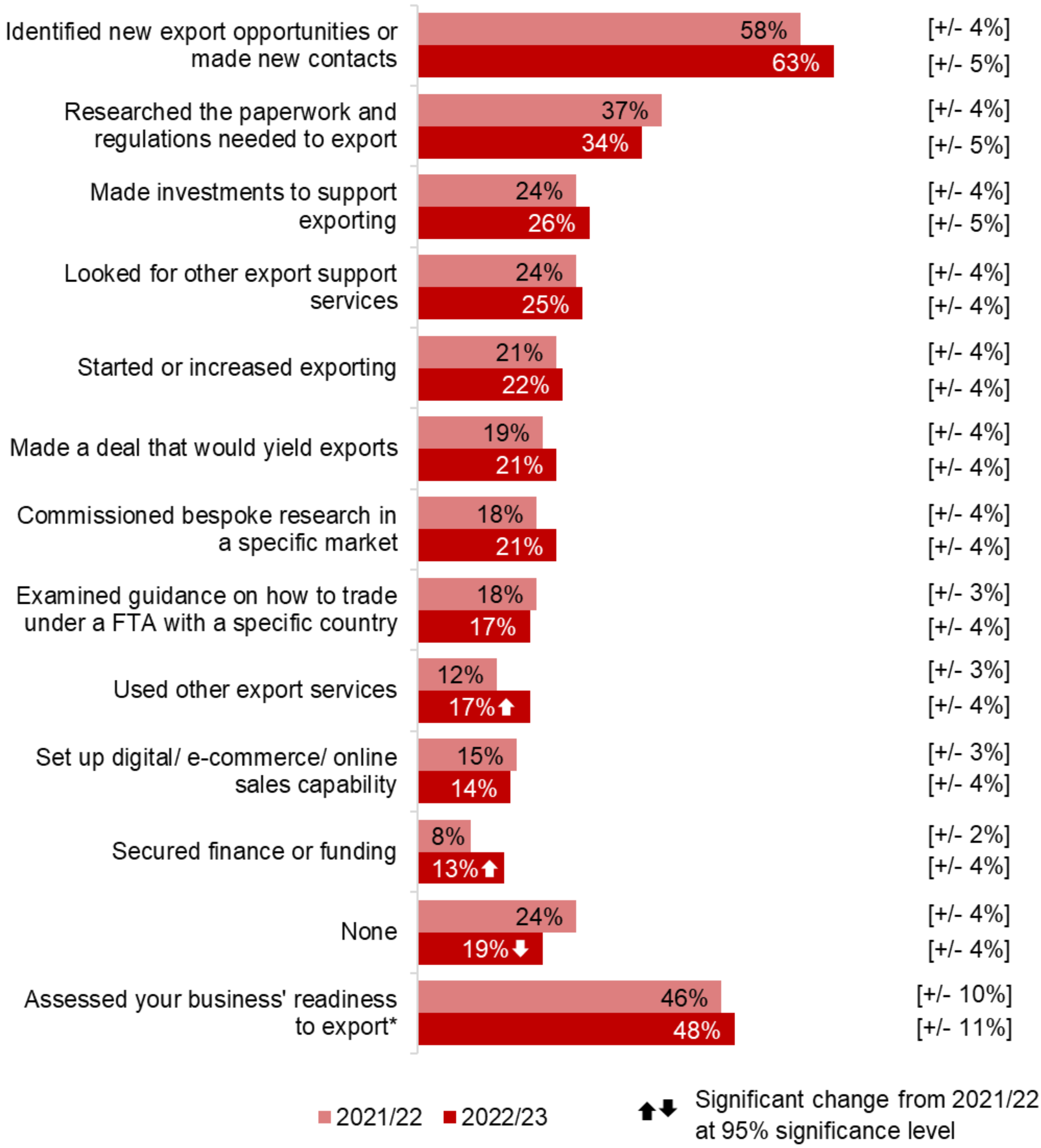
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=674 (2021/22), n=502 (2022/23)), Lack of knowledge (n=671 (2021/22), n=498 (2022/23)), Capacity to export (n=668 (2021/22), n=496 (2022/23)).
Qknowchange – Using the same scale as before, thinking about your experience of the service, to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks / understand how to assess capacity and readiness to export? Base: All businesses who used the service (n=685 (2021/22), n=509 (2022/23)).

3.3.2.2 Taking action

Businesses had taken a range of actions as a result of using Posts. Almost half (48%) of businesses that were not exporting at the time of using the service, had assessed the business' readiness to export. Among all businesses, over three in five said they had identified new export opportunities or made new contacts (63%). A third (34%) said they had researched the paperwork and regulations needed to export.

Compared with the previous year, businesses were more likely to say they had taken at least one action as a result of using Posts (19% said they had taken no actions, compared to 24% in 2021/22). Specifically, businesses were more likely to say they had used other export services (17% compared to 12% in 2021/22) or secured finance or funding (13% compared to 8% in 2021/22).

Chart 3.3.7 Actions taken as a result of service interaction – Posts

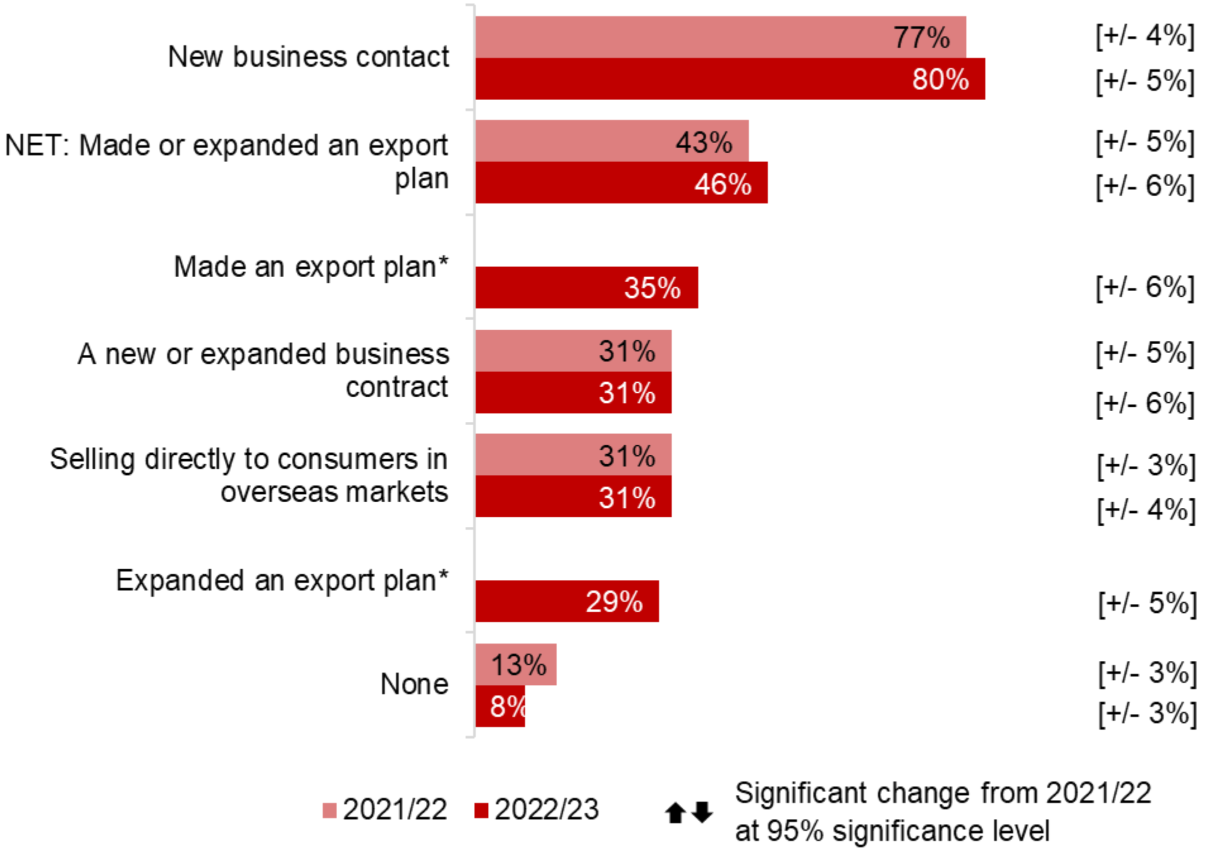


*Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n=685 (2021/22), n=509 (2022/23)); Non-exporters (n=198 (2021/22), n=143 (2022/23)). Only prompted codes are shown. * Asked to non-exporters only.*

3.3.2.3 Identifying new opportunities

As a result of using Posts, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (80%), followed by making or expanding an export plan (46%), selling directly to consumers in overseas markets (31%) or making a new or expanded business contract (31%). These findings were in line with 2021/22.

Chart 3.3.8 Opportunities identified as a result of service interaction – Posts



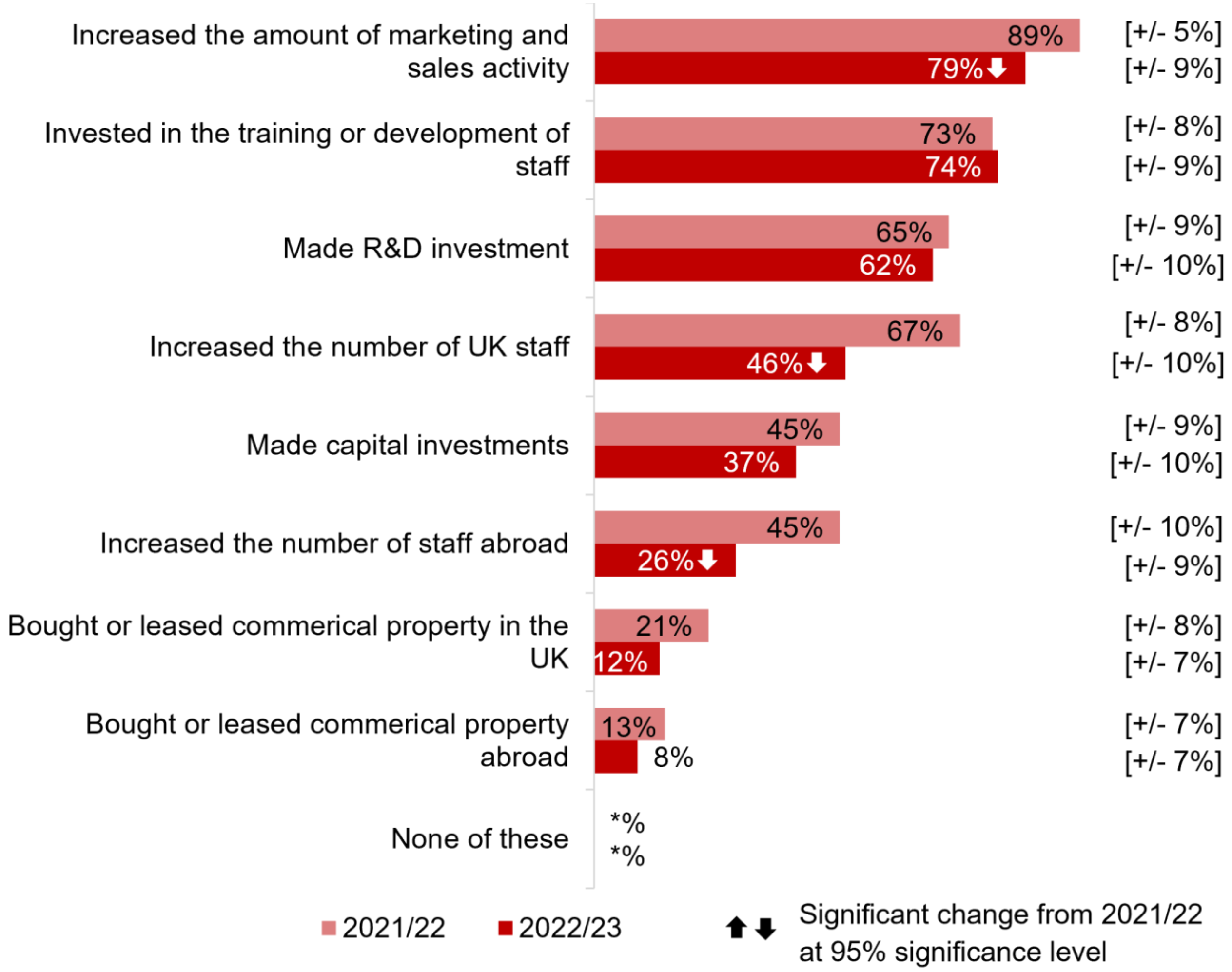
*Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All businesses who used the service who had identified a new business contact as part of the DBT service (n=461 (2021/22), n=368 (2022/23)). Only prompted codes are shown. * Codes split out in 2022/23.*

3.3.2.4 Making investments

Using the Posts service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the Posts service (26% overall), four in five (79%) said they had increased their marketing and sales activity, while three-quarters (74%) said they had invested in the training or development of staff. Around three in five (62%) had made a Research and Development investment, while just under half had increased the number of UK staff (46%).

Compared to the previous year, businesses were less likely to have increased their marketing and sales activity (79% compared to 89% in 2021/22), increased the number of UK staff (46% compared to 67% in 2021/22) or increased the number of staff abroad (26% compared to 45% in 2021/22).

Chart 3.3.9 Type of investments made as a result of DBT service – Posts

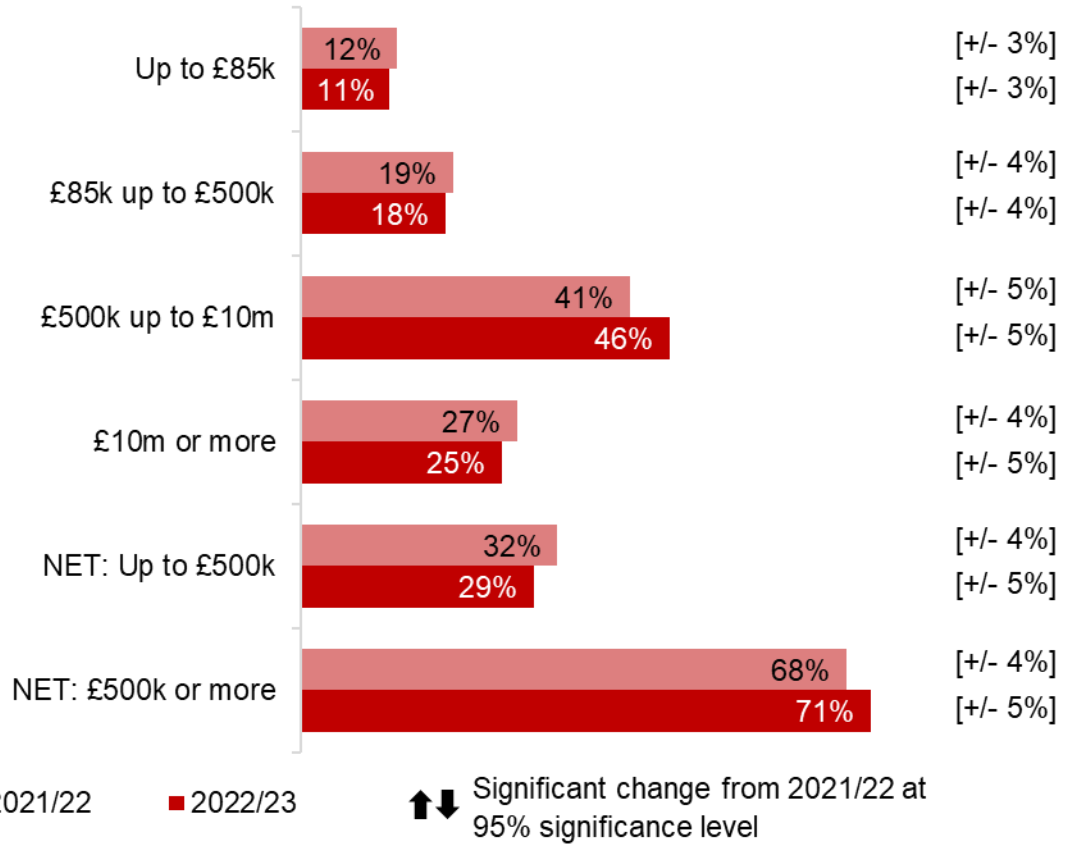


*Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Base: All businesses who had used the service and had made investments to support exporting (n=154 (2021/22), n=125 (2022/23)). Only prompted codes are shown. *Redacted*

3.3.3 Service use by firmographics and export behaviour

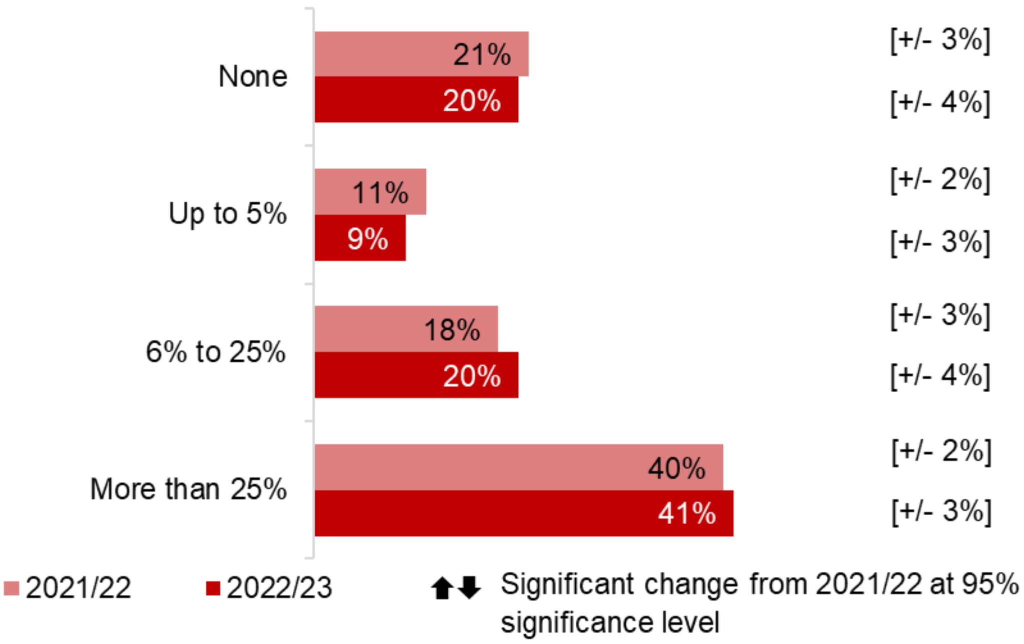
Seven in ten Posts businesses had a high turnover of £500,000 or more (71%), while three in ten had a lower turnover (29%). Two in five firms (41%) reported that more than a quarter of their turnover came from exporting. These findings were in line with the previous year.

Chart 3.3.10 Turnover – Posts



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational businesses)? Base: All businesses who used the service (excluding Don't know/Refused) (n=456 (2021/22), n=350 (2022/23)).

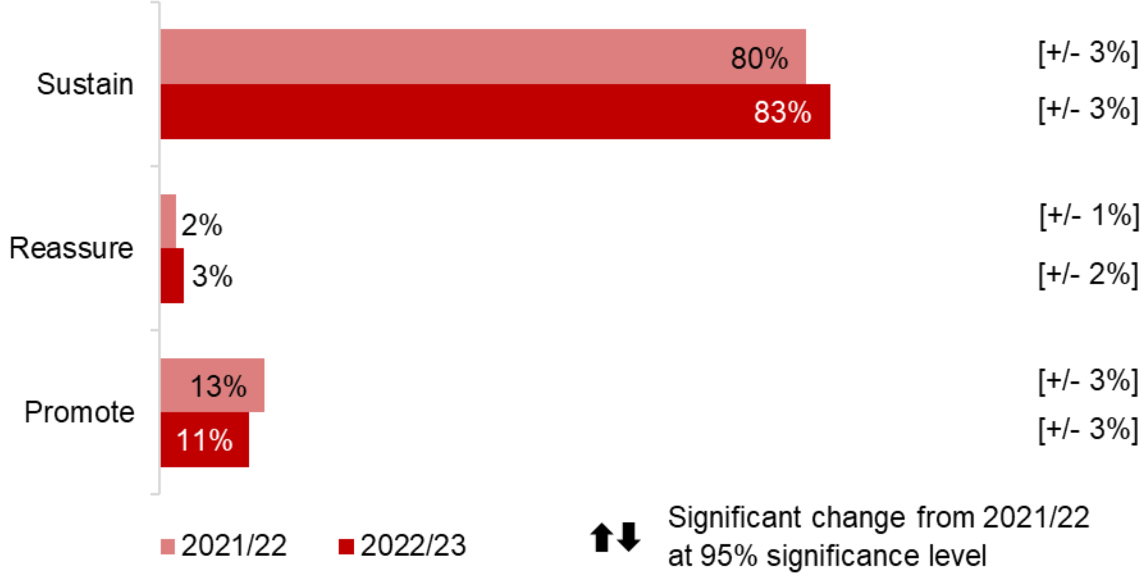
Chart 3.3.11 Proportion of turnover from exporting – Posts



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n=685 (2021/22), n=509 (2022/23)). 'Don't know' and 'Refused' responses not shown

Current exporters made up the majority of businesses using the Posts service. More than four in five businesses (83%) were currently exporting ('Sustain'). Around one in ten (11%) had never exported before ('Promote'), while only 3% had exported before but not in the past 12 months ('Reassure').[22] These findings were in line with the previous year.

Chart 3.3.12 Exporter status – Posts

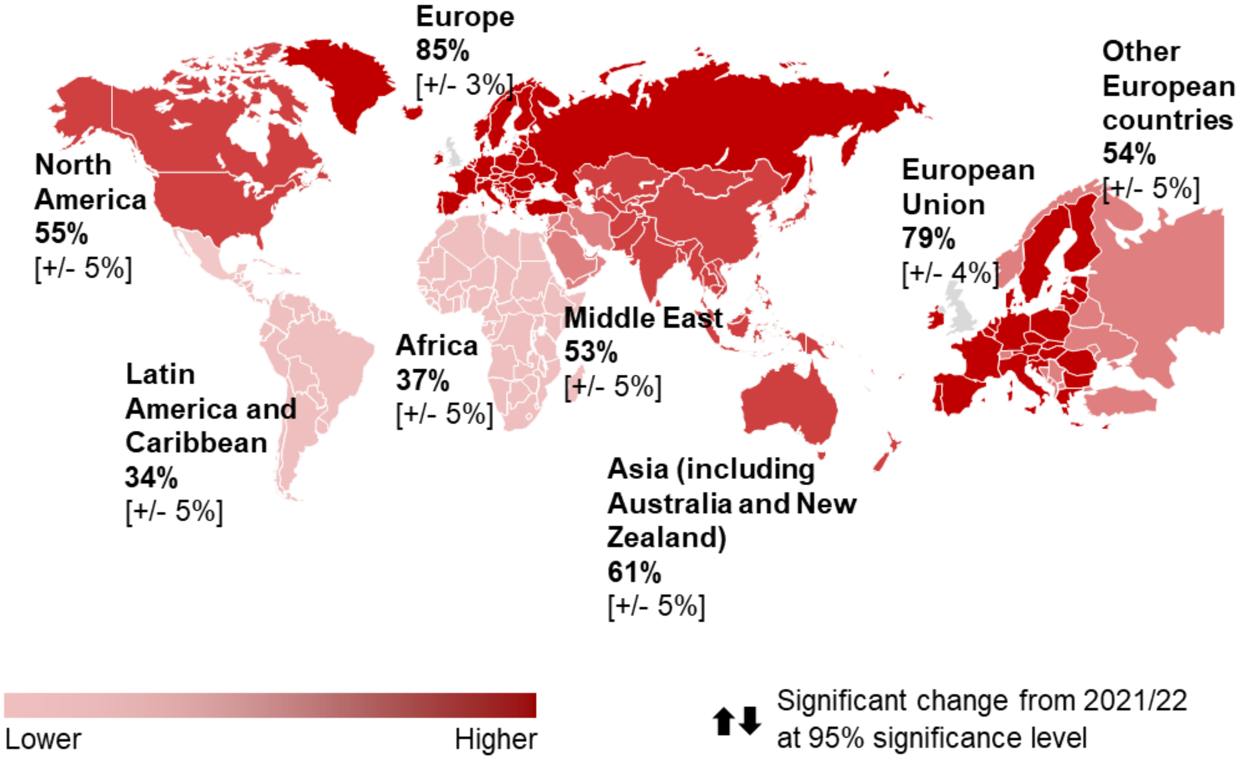


Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n=685 (2021/22), n=509 (2022/23)).

Europe remained the most common export market among Posts businesses (85%). Among those that were currently exporting or had done so previously, four in five (79%) exported to the European Union, followed by Asia (61%), North America (55%), non-EU European countries (54%) and the Middle East (53%). A third (34%) of those that were currently exporting (or had done so previously) had exported to Latin America and the Caribbean, making this region the least common export market among Posts users. These findings were in line with the previous year.

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

Chart 3.3.13 Regions organisations export to or exported to previously – Posts



Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n=561 (2021/22), n=437 (2022/23)).

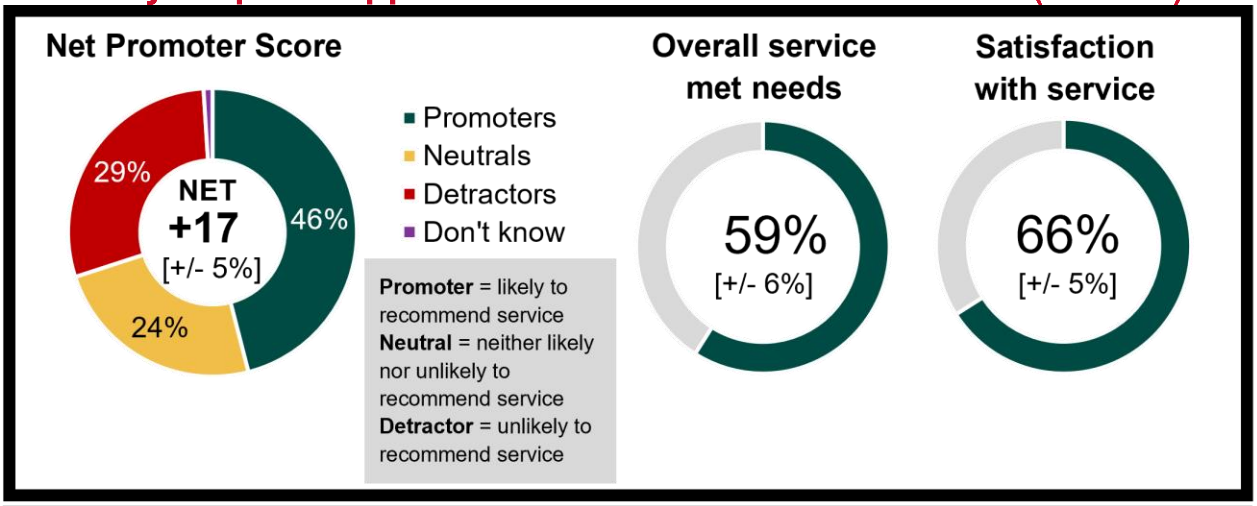
Table 3.3.3 Regions organisations export to or exported to previously – Posts

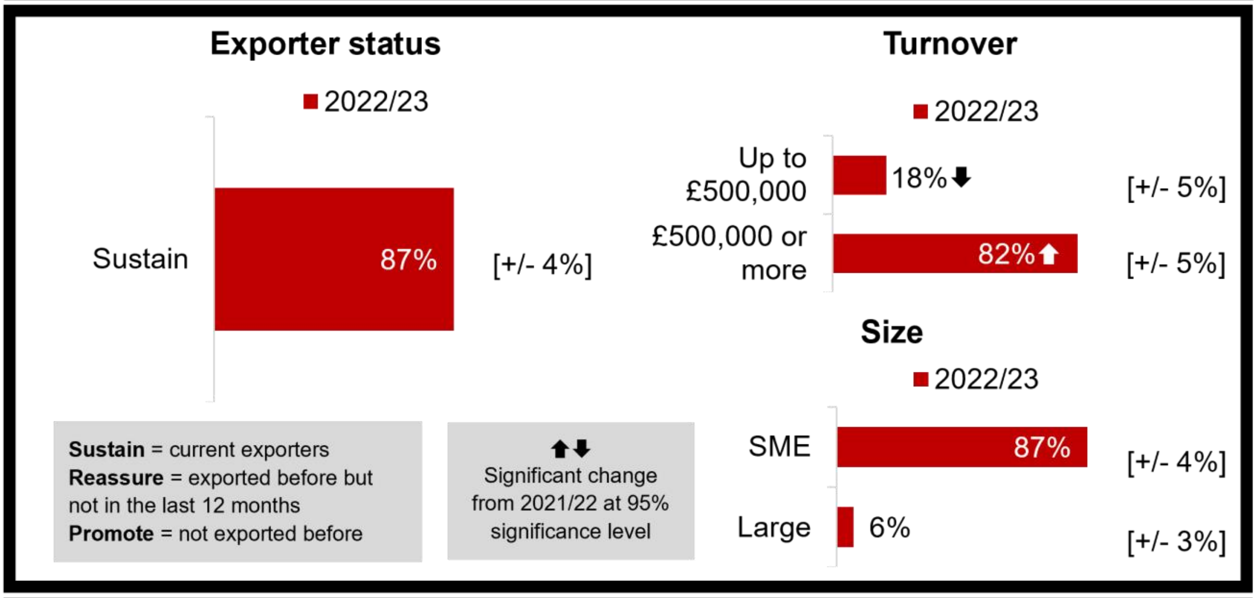
Region	% (21/22)	CI (+/-) (21/22)	% (22/23)	CI (+/-) (22/23)	Change
Europe	85%	3%	85%	3%	-
European Union	79%	3%	79%	4%	-
Other European countries	51%	4%	54%	5%	-
Asia (including Australia and New Zealand)	59%	4%	61%	5%	-
North America	55%	4%	55%	5%	-
Middle East	55%	4%	53%	5%	-
Africa	41%	4%	37%	5%	-
Latin America and the Caribbean	31%	4%	34%	5%	-

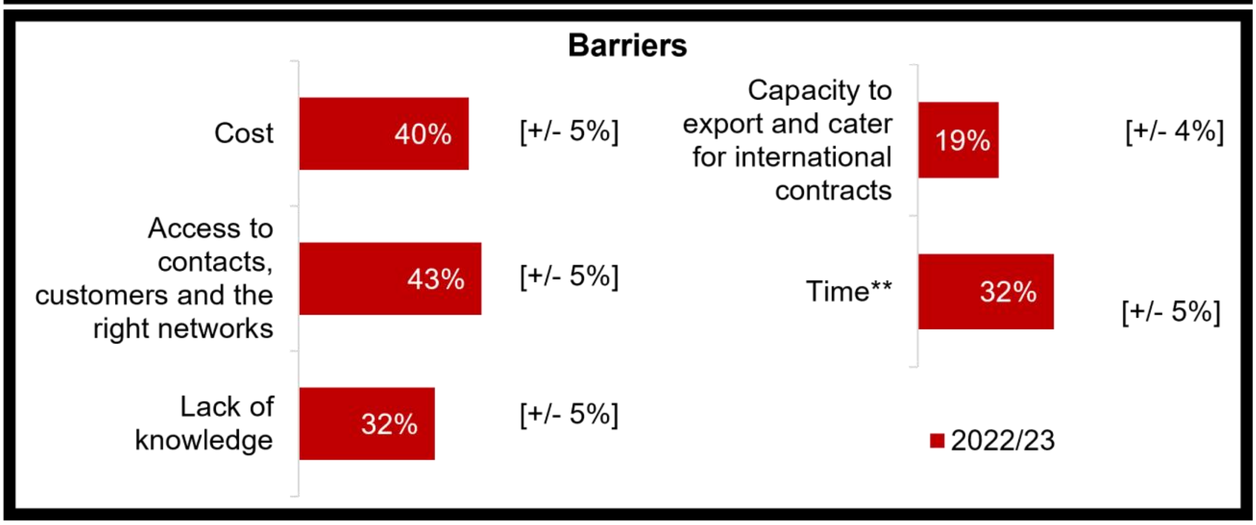
↑↓ Significant change from 2021/22 at 95% significance level

Qcurexp – Do you currently or did you export to any of the following regions? Base: All respondents who used the service and who have exported (n=561 (2021/22), n=437 (2022/23)).

Summary: Export Support Service – International Markets (ESS-IM)







Base: All businesses who used the service (n= (2021/22), n=319 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=* (2021/22), n=309 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=* (2021/22), n=312 (2022/23)); Exporter status (n=* (2021/22), n=319 (2022/23)); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=* (2021/22), n=218 (2022/23)); Size - All businesses who used the service (n=* (2021/22), n=319 (2022/23)); Barriers - All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=* (2021/22), n=315 (2022/23)), Cost (n=* (2021/22), n=313 (2022/23), Lack of knowledge (n=* (2021/22), n=314 (2022/23)), Capacity to export (n=* (2021/22), n=314 (2022/23)), Time (n=308). ** Code added in 2022/23. * Redacted due to small base size.*

3.4 Export Support Service – International Markets (ESS-IM)

The ESS-IM service is based on Export Service Hubs in the HMTC regions covering all major export markets. It aims to provide firms with advice, diagnostic support, off-the-shelf market intelligence, and access to Overseas Private Sector Referral networks. It is available to all UK businesses, with support focused on high export potential and export ready businesses. ESS-IM may be used interchangeably with the relevant Export Hub, for example China Export Hub or North America Export Hub.

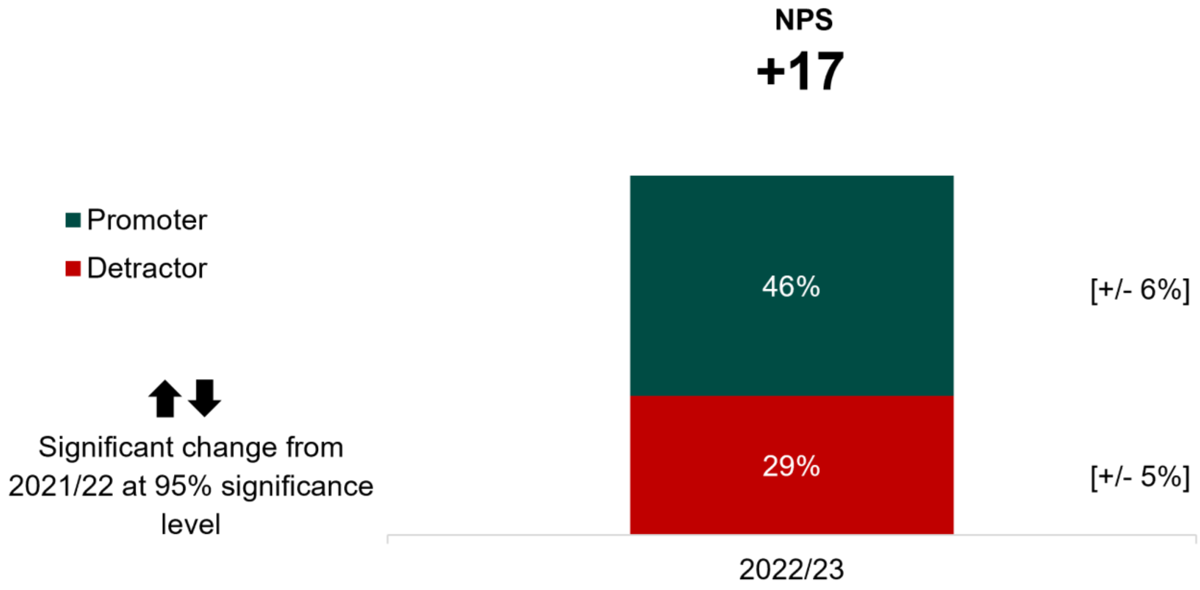
This chapter explores satisfaction with the ESS-IM service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 319 businesses who used ESS-IM between April 2022 and March 2023. There are no year-on-year comparisons with the previous reporting year due to small base size.

3.4.1 Satisfaction with the ESS-IM service

3.4.1.1 Service performance

Businesses were somewhat positive about the ESS-IM service and were likely to recommend it to colleagues and business associates. Nearly half of respondents (46%) were 'Promoters', i.e. likely to recommend the service, and three in ten (29%) were 'Detractors', i.e. unlikely to recommend the service.[23]

Chart 3.4.1 Likelihood of recommending service (NPS) – ESS-IM



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 who used the service (n= (2021/22), n=319(2022/23)). 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size.*

When asked about **suggestions to improve the service**, a third of respondents wanted better support generally (33%), while three in ten mentioned improved communication (30%). Specifically, the most frequently suggested improvement for the service was

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

introducing more sector or industry specific support (19%), followed by more communication or information (16%), better follow up (14%), and better-quality information (11%).

Table 3.4.1 Net Promoter Score for service by HMTC region

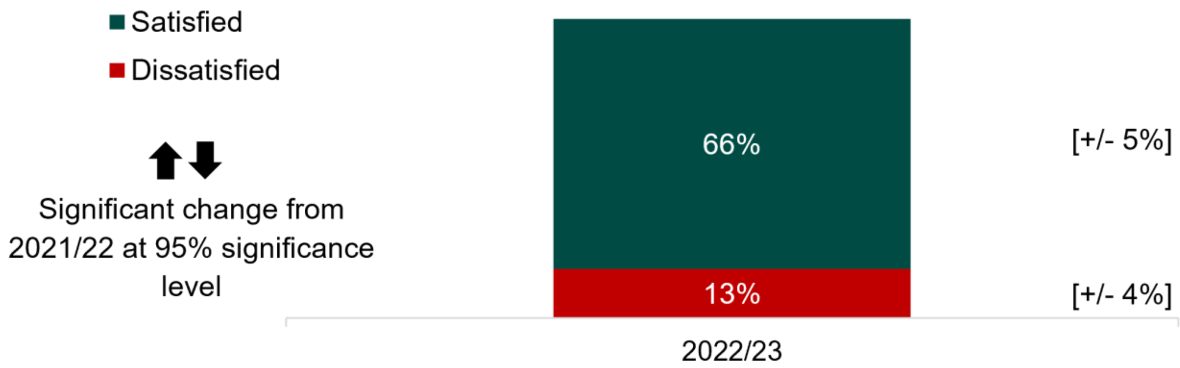
HMTC Region	NPS (22/23)	CI (+/-) (22/23)	Base (22/23)
Overall	17	5%	319
Europe	c	c	c
Eastern Europe and Central Asia	c	c	c
Middle East	c	c	c
Asia Pacific	c	c	c
Latin America and Caribbean	c	c	c
North America	c	c	c
Africa	c	c	c
China and Hong Kong	c	c	c
South Asia	c	c	c

c Cells have been suppressed to protect confidentiality

3.4.1.2 Satisfaction

Most ESS-IM businesses were satisfied with the service. Two-thirds of respondents (66%) said they were satisfied with their experience and 13% said they were dissatisfied.[24]

Chart 3.4.2 Satisfaction with service - ESS-IM



Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n= (2021/22), n=312 (2022/23)). 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size..*

Of the businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction**[25] was feeling that the service did not meet their expectations. A similar proportion of businesses felt that they did not get enough information or advice and that DBT did not do anything for them or did not help them.

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

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

Table 3.4.2 Satisfaction with service by HMTC region

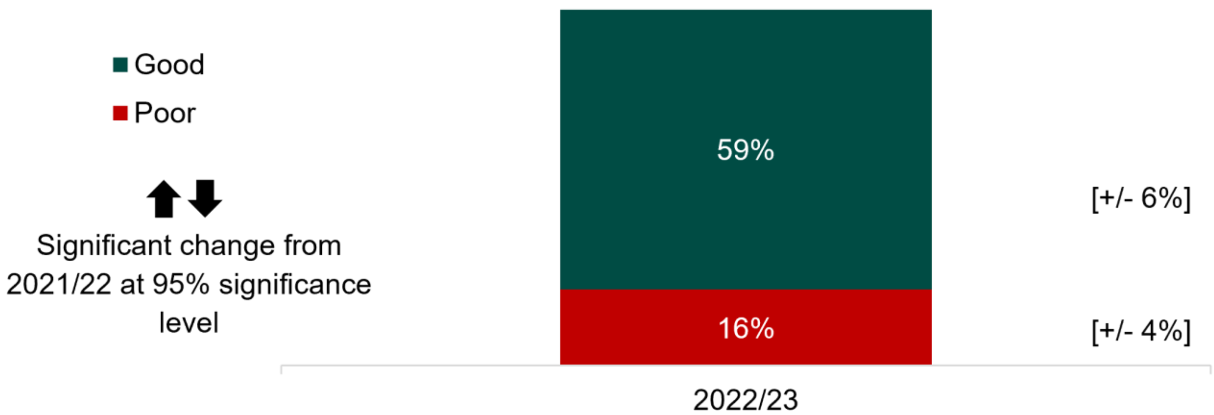
HMTC Region	Satisfied (22/23)	CI (+/-) (22/23)	Base (22/23)
Overall	66%	5%	312
Europe	c	c	c
Eastern Europe and Central Asia	c	c	c
Middle East	c	c	c
Asia Pacific	c	c	c
Latin America and Caribbean	c	c	c
North America	c	c	c
Africa	c	c	c
China and Hong Kong	c	c	c
South Asia	c	c	c

c Cells have been suppressed to protect confidentiality

3.4.1.3 Whether overall service met needs

Businesses were positive that the ESS-IM service had met their needs; three in five (59%) rated it as good, and one in six (16%) rated it as poor.[26] These findings were in line with the previous year.

Chart 3.4.3 Rating of whether overall service met needs – ESS-IM



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n= (2021/22), n=309 (2022/23)). 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size.*

Businesses were most positive about the organisation of the service (83%), followed by the straightforwardness of the registration process (76%), staff knowledge (74%), how clear the steps were that they needed to take when using the service (69%), and the

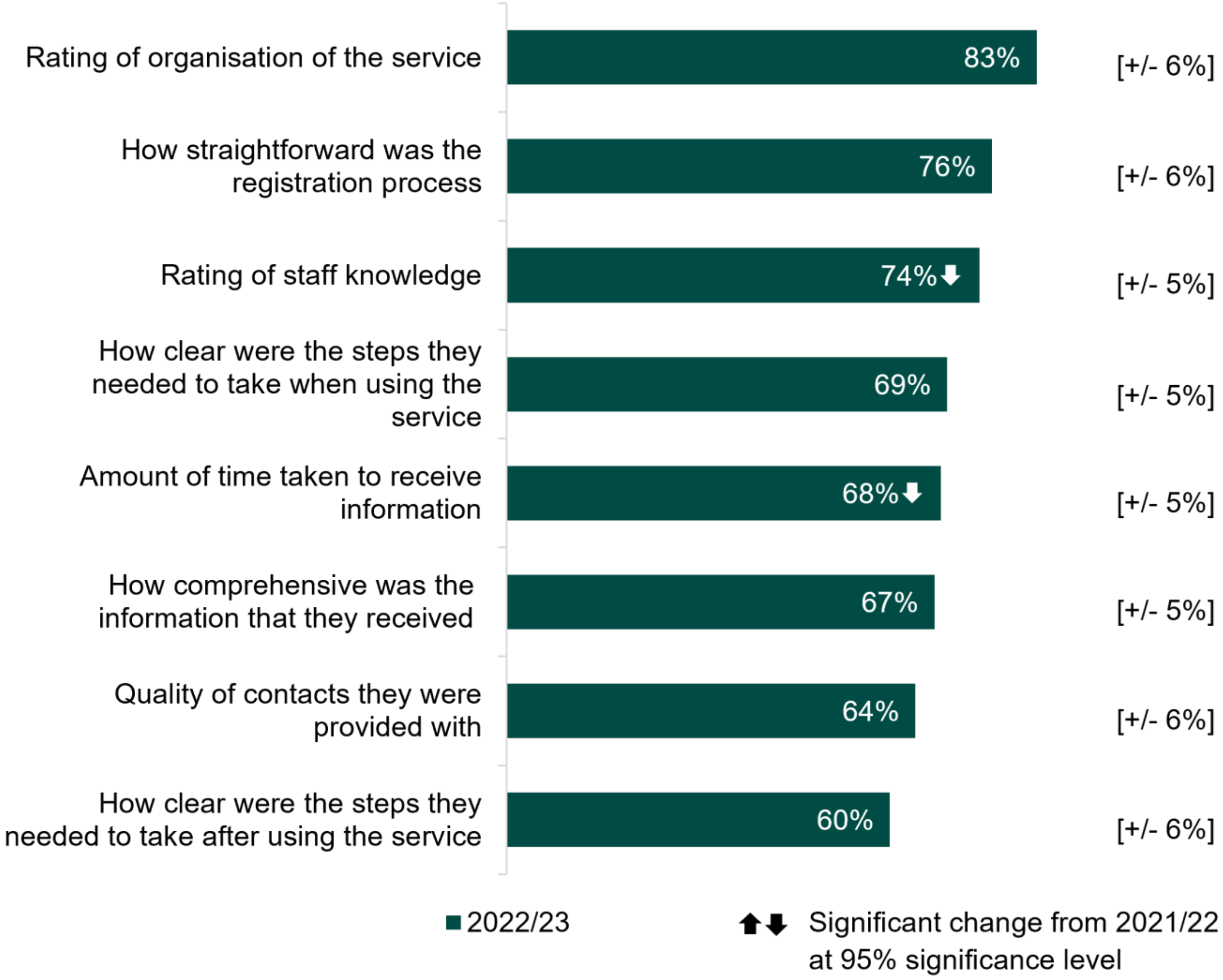
[26] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.

amount of time taken to receive information (68%). They were least positive about how clear the steps were that they needed to take after using the service (60%).[27]

Businesses were less positive about levels of staff knowledge (74%) and the amount of time taken to receive information (68%). Businesses with turnovers of £500,000 or more were more likely to be positive about how clear the steps were that they needed to take when using the service (70%) compared to businesses with lower turnovers (50%).

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

Chart 3.4.4 Rating by business of the specific advice and support they received – ESS-IM



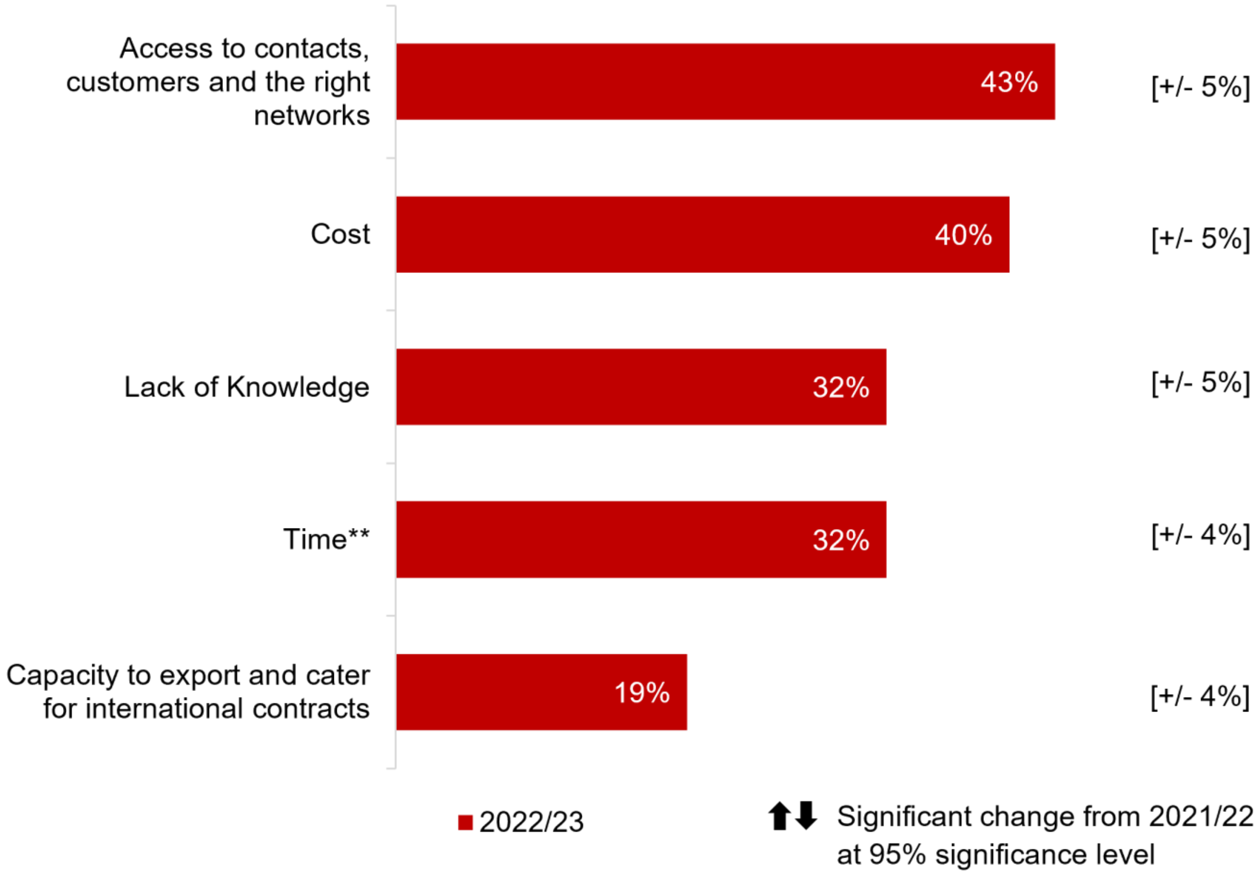
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n= (2021/22), n=299 (2022/23)). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=* (2021/22), n=309 (2022/23)). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=* (2021/22), n=300 (2022/23)). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from the service? (n=* (2021/22), n=301 (2022/23)). Qclarity_2 – The service made clear what I should do next after using it (n=* (2021/22), n=296 (2022/23)). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through the service? (n=* (2021/22), n=274 (2022/23)). Qreg – How straightforward was the registration process for the service? (n=* (2021/22), n=192 (2022/23)). Qevent – How would you rate the organisation of the service? (n=* (2021/22), n=175 (2022/23)). Base: All businesses who used the service (excluding 'not applicable' responses). 'Negative', 'Neutral' and 'Don't know' responses not shown. * Redacted due to small base size.*

3.4.2 Outcomes of using the ESS-IM service

3.4.2.1 Counteracting the barriers to exporting

Businesses that used the ESS-IM service reported facing barriers to exporting. Over two in five (43%) reported access to contacts, customers and the right networks as a barrier, and a similar proportion reported cost as a barrier (40%). A third of respondents reported lack of knowledge (32%) and time (32%) as barriers. Respondents were least likely to have reported their capacity to export and cater for international contracts as a barrier (19%).

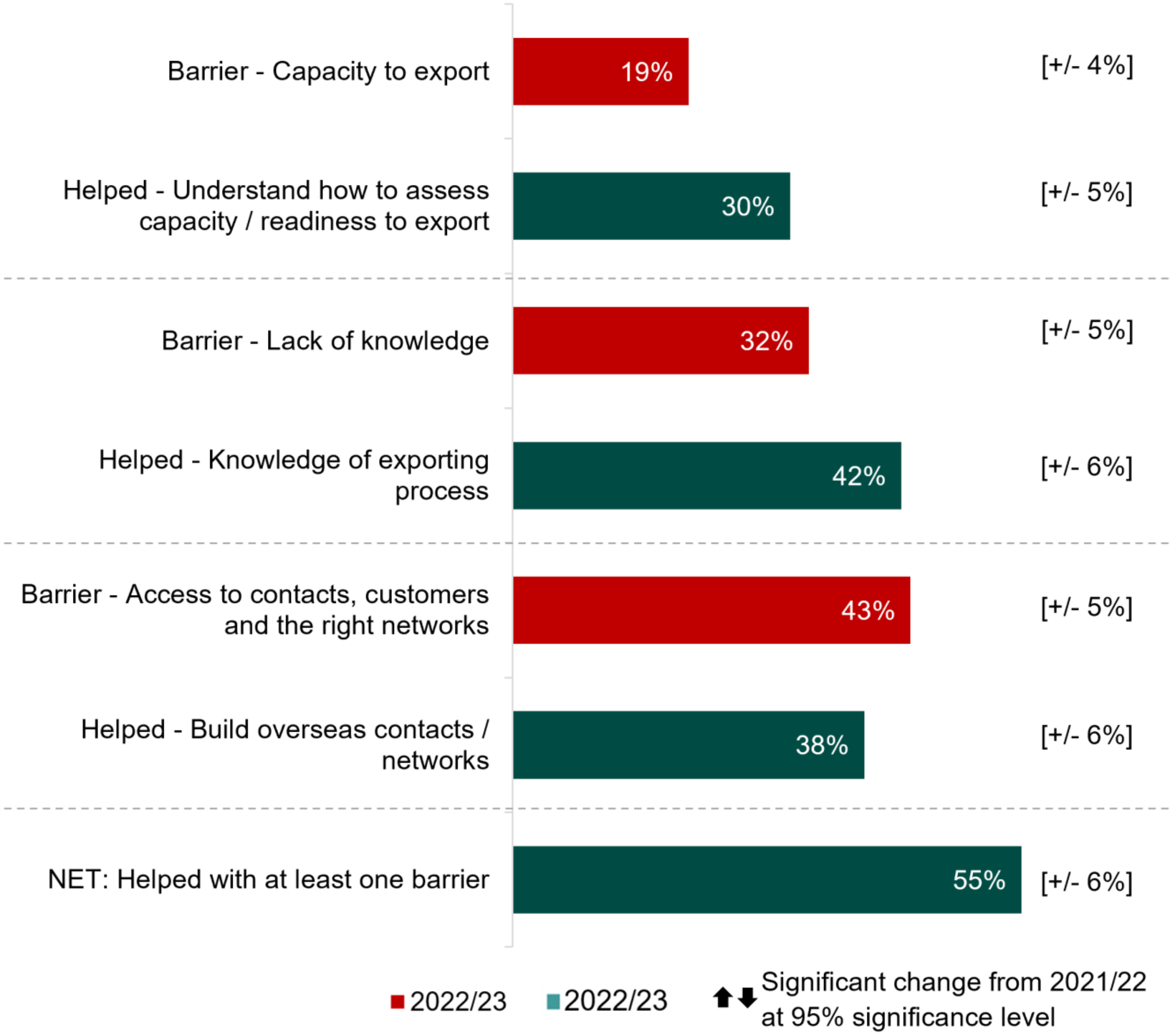
Chart 3.4.5 Barriers to exporting – ESS-IM



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n= (2021/22), n=315 (2022/23)), Cost (n=* (2021/22), n=313 (2022/23)), Lack of knowledge (n=* (2021/22), n=314 (2022/23)), Capacity to export (n=* (2021/22), n=314 (2022/23)), Time (n=308). 'Neutral', 'Not a barrier' and 'Don't know' responses not shown. ** Code added in 2022/23. * Redacted due to small base size.*

Businesses were asked whether using ESS-IM (and therefore DBT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using ESS-IM had helped them understand how to increase their knowledge of the exporting process (42%), build overseas contacts or networks (38%), or assess their capacity and readiness to export (30%).

Chart 3.4.6 Barriers to exporting and how DBT helped – ESS-IM



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n= (2021/22), n=315 (2022/23)), Lack of knowledge (n=* (2021/22), n=314 (2022/23)), Capacity to export (n=* (2021/22), n=314 (2022/23))). * Redacted due to small base size.*
Qknowchange – Using the same scale as before, thinking about your experience of the service, to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks / understand how to assess capacity and readiness to export? Base: All businesses who used the service (n= (2021/22), n=319 (2022/23)). * Redacted due to small base size.*

3.4.2.2 Taking action

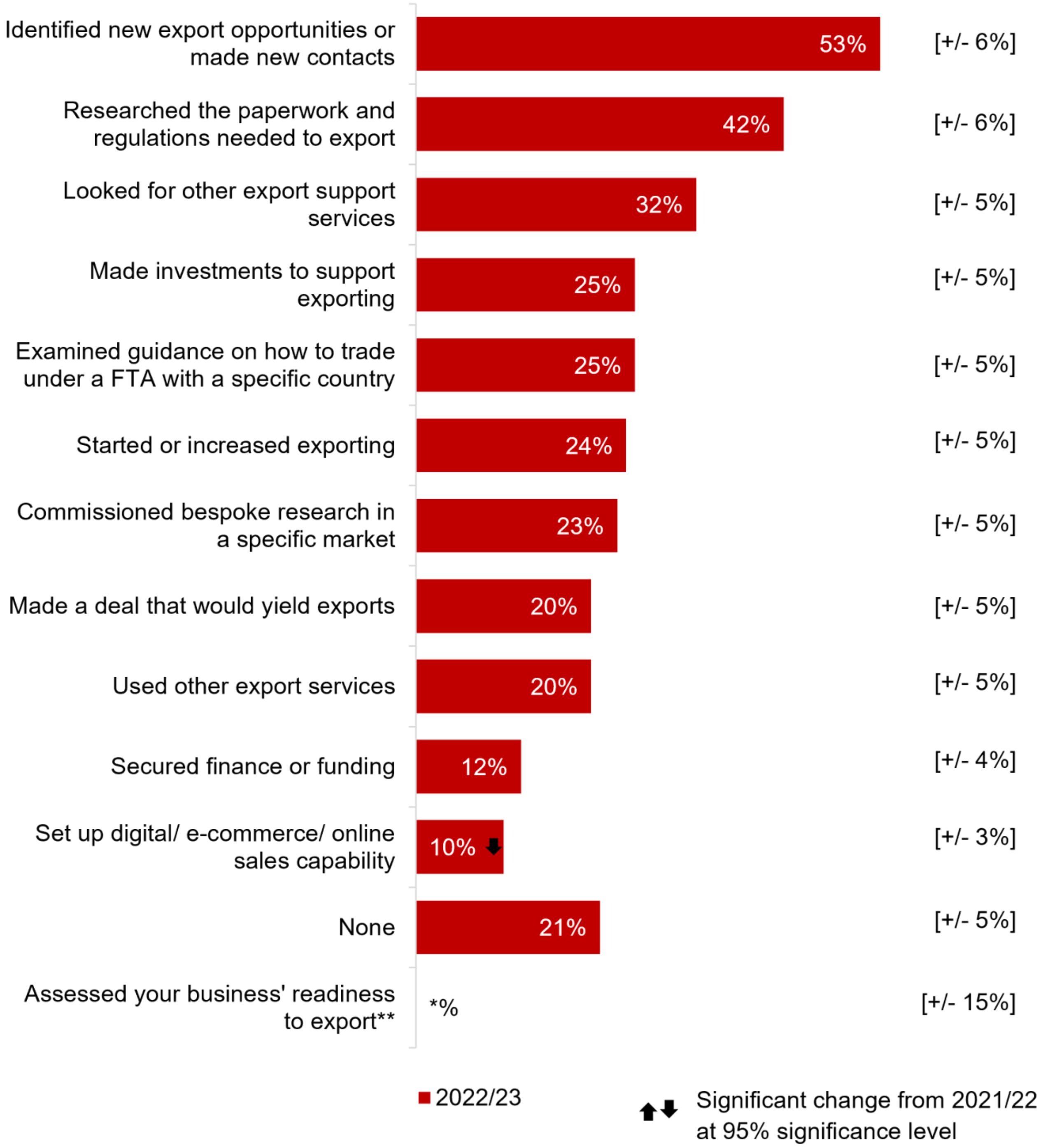
Businesses had taken a range of actions as a result of using ESS-IM. Of the 41 businesses that were not exporting at the time of using the service, nearly three in five (58%) had assessed the business' readiness to export.

Among all ESS-IM businesses, over half said they had identified new export opportunities or made new contacts (53%). Two in five (42%) said they had researched the paperwork and regulations needed to export, and a third had looked for other export support services

(32%). A quarter of businesses said they had made investments to support exporting (25%), examined guidance on how to trade under a FTA with a specific country (25%), and started or increased exporting (24%).

Few businesses set up digital, e-commerce, or online sales capability (10%).

Chart 3.4.7 Actions taken as a result of service interaction – ESS-IM

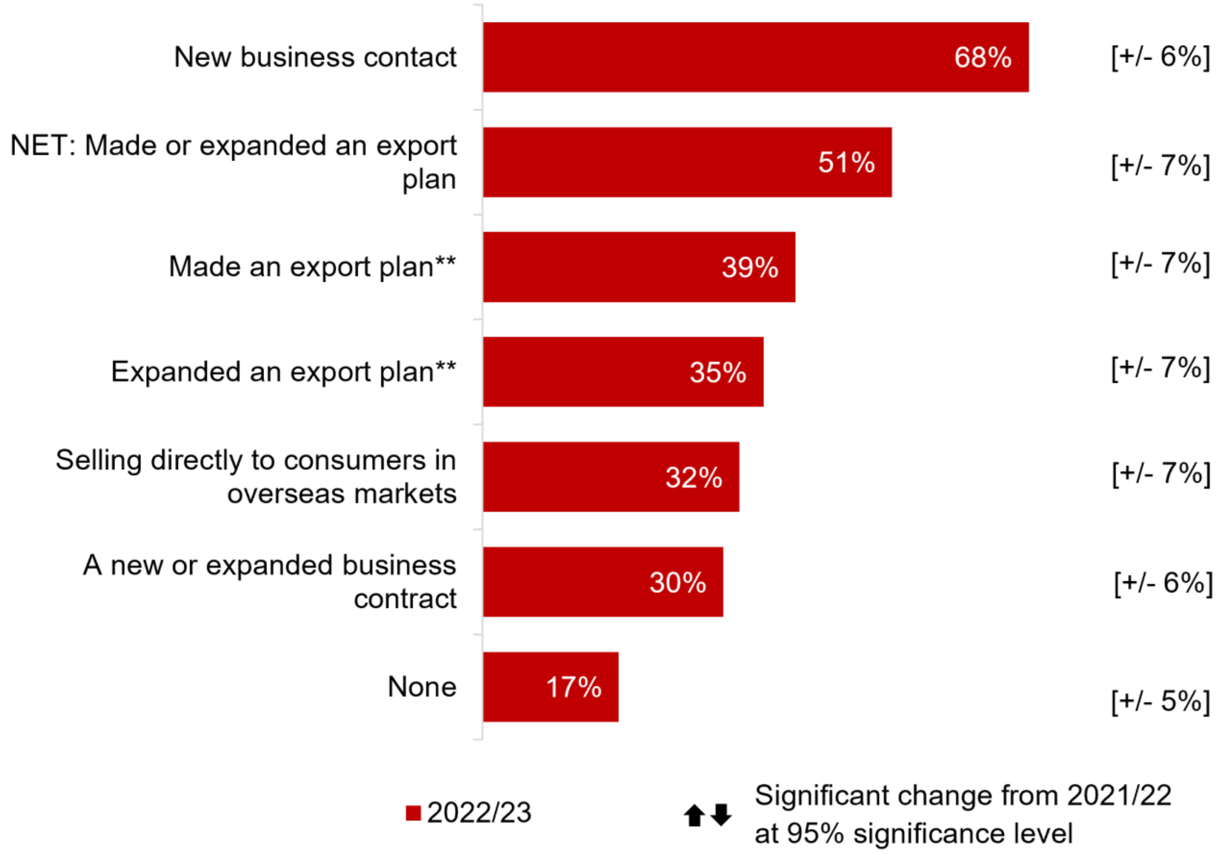


Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n= (2021/22), n=319 (2022/23)); Non-exporters (n=* (2021/22), n=* (2022/23)). Only prompted codes are shown. ** Asked to non-exporters only. . * Redacted due to small base size.*

3.4.2.3 Identifying new opportunities

As a result of using ESS-IM, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (68%), followed by making or expanding an export plan (51%), selling directly to consumers in overseas markets (32%), or making a new or expanding a business contract (30%).

Chart 3.4.8 Opportunities identified as a result of service interaction – ESS-IM



Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All businesses who used the service who had identified a new business contact as part of the DBT service (n= (2021/22), n=217 (2022/23)). Only prompted codes are shown. ** Codes split out in 2022/23. * Redacted due to small base size.*

3.4.2.4 Making investments

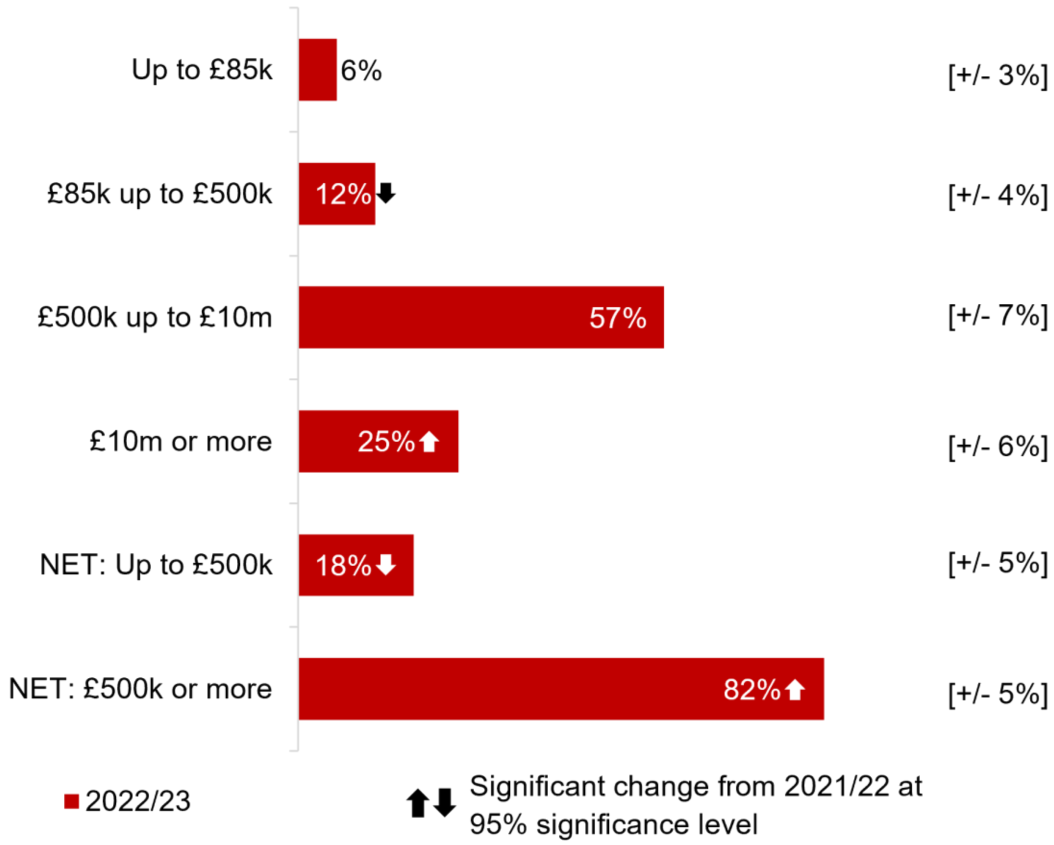
Using the ESS-IM service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the ESS-IM service (25% overall), three-quarters (76%) said they had increased their marketing and sales activity, while seven in ten increased the number of UK staff (71%) and almost three in five made a Research and Development investment (56%).

3.4.3 Service use by firmographics and export behaviour

Eight in ten ESS-IM businesses (82%) had higher turnovers of £500,000 or more, while 18% had lower turnovers of up to £500,000, which represent a change compared to the previous year (61% and 39% respectively).

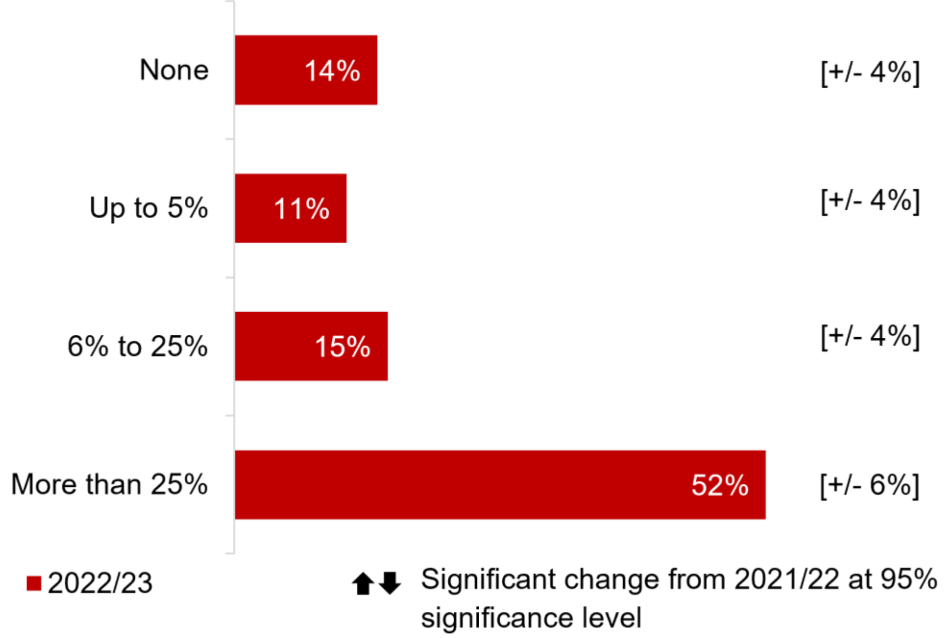
Half of firms (52%) reported that more than a quarter of their turnover came from exporting.

Chart 3.4.9 Turnover – ESS-IM



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational businesses)? Base: All businesses who used the service (excluding Don't know/Refused) (n= (2021/22), n=218 (2022/23)). . * Redacted due to small base size.*

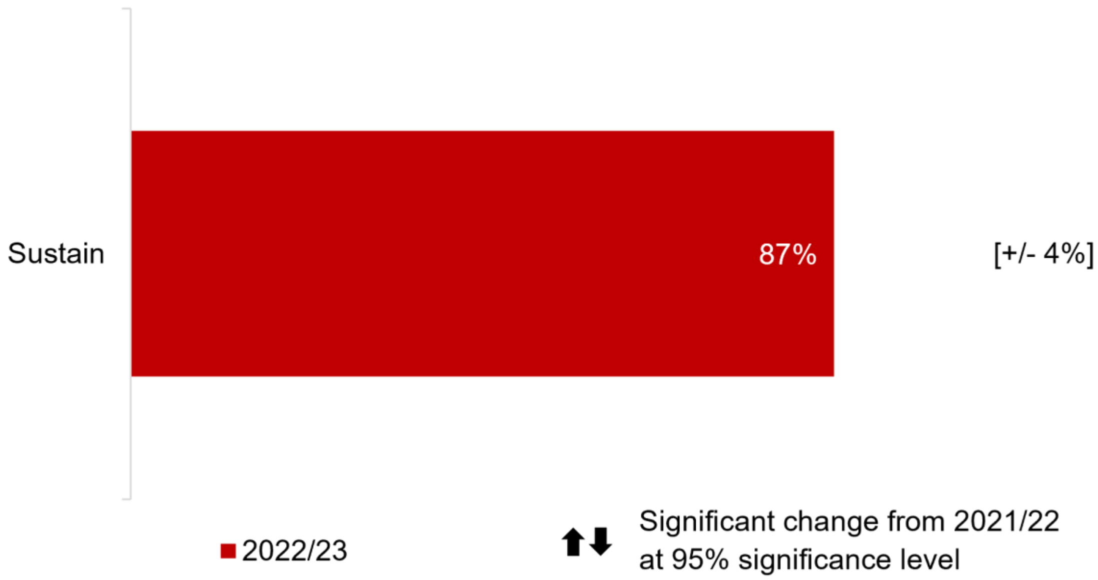
Chart 3.4.10 Proportion of turnover from exporting – ESS-IM



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n=94 (2021/22), n=319 (2022/23))). 'Don't know' and 'Refused' responses not shown. * Redacted due to small base size.*

Current exporters made up the majority of businesses using the ESS-IM service. Nearly nine in ten businesses (87%) were currently exporting ('Sustain').

Chart 3.4.11 Exporter status – ESS-IM

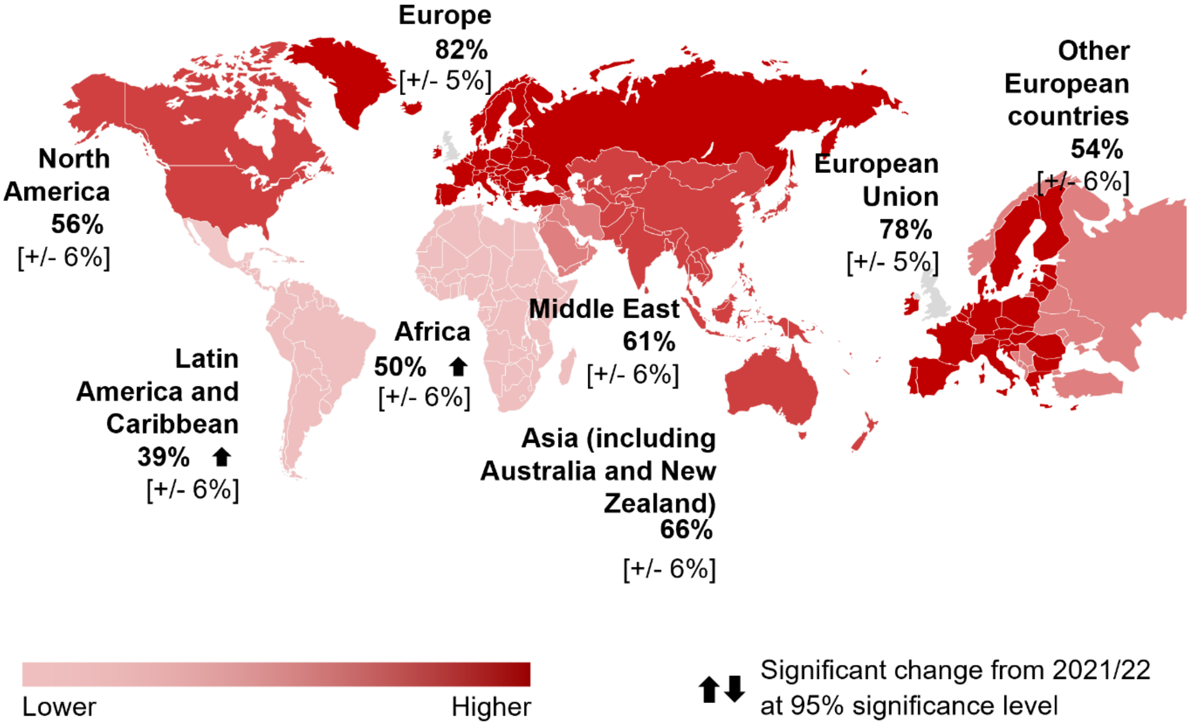


Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n= (2021/22), n=319 (2022/23) . * Redacted due to small base size.*

Europe was the most common export market among ESS-IM businesses, with over four in five exporting to the region (82%). Europe as an export market was further divided into the

European Union, which over three-quarters of ESS-IM businesses had exported to (78%), and other European countries, which over half of ESS-IM businesses had exported to (54%). Two-thirds of businesses exported to Asia (66%), followed by the Middle East (61%) and North America (56%). ESS-IM businesses also had exported to Africa (50%) and Latin America and the Caribbean (39%).

Chart 3.4.12 Regions organisations export to or exported to previously – ESS-IM



Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n= (2021/22), n=281 (2022/23)). * Redacted due to small base size.*

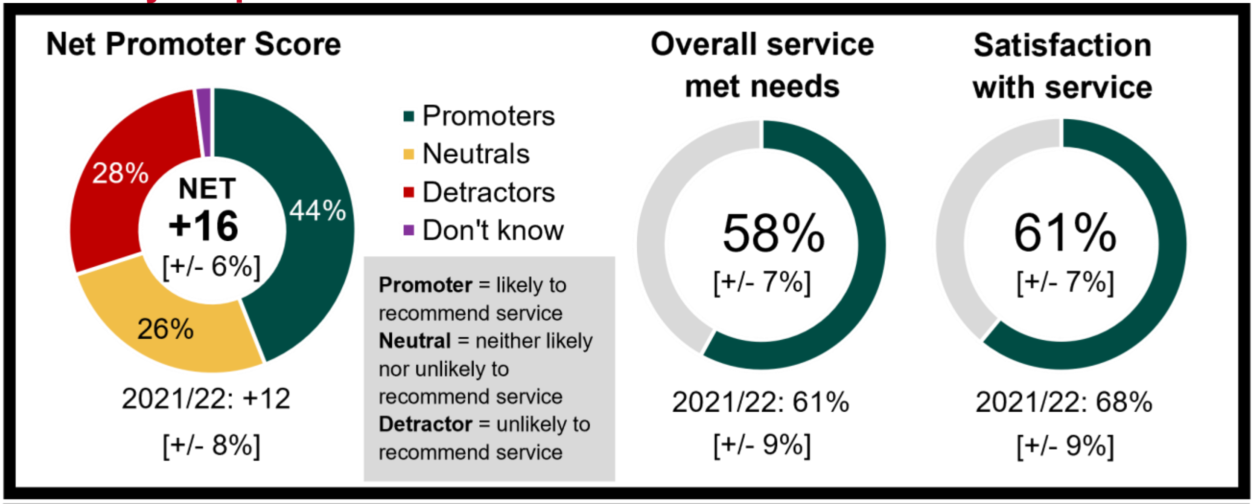
Table 3.4.3 Regions organisations export to or exported to previously – ESS-IM

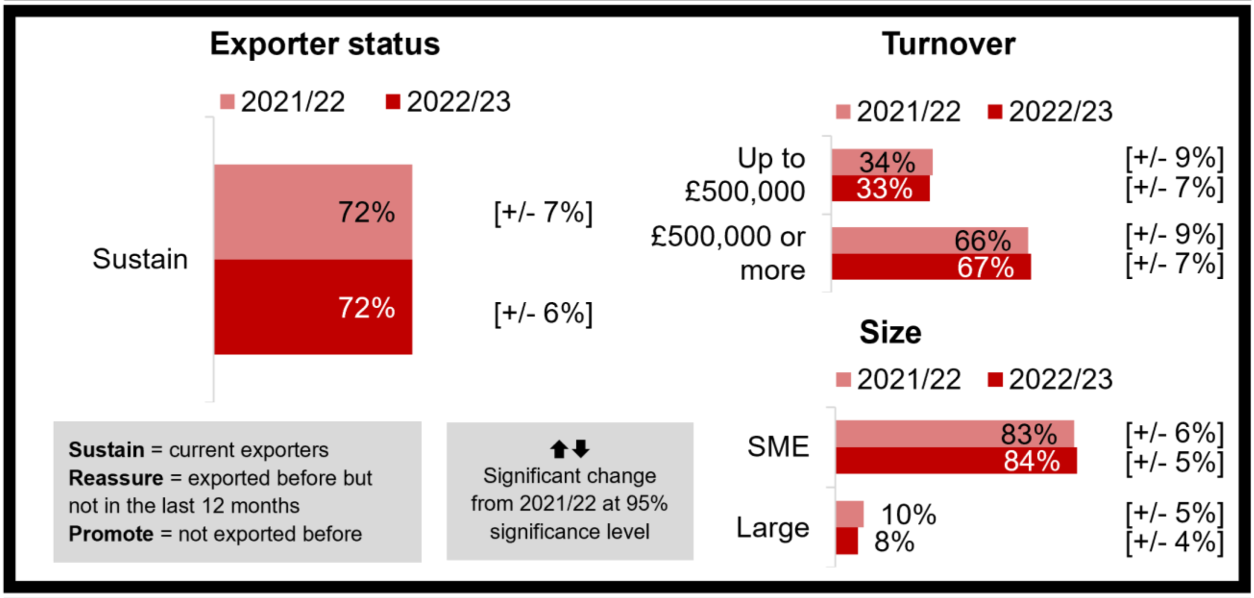
HMTC Region	% (21/22)	CI (+/-) (21/22)	% (22/23)	CI (+/-) (22/23)	Change
Europe	c	c	82%	5%	-
European Union	c	c	78%	8%	-
Other European countries	c	c	54%	6%	-
Asia (including Australia and New Zealand)	c	c	66%	6%	-
Middle East	c	c	61%	6%	-
North America	c	c	56%	6%	-
Africa	c	c	50%	6%	↑
Latin America and Caribbean	c	c	39%	6%	↑

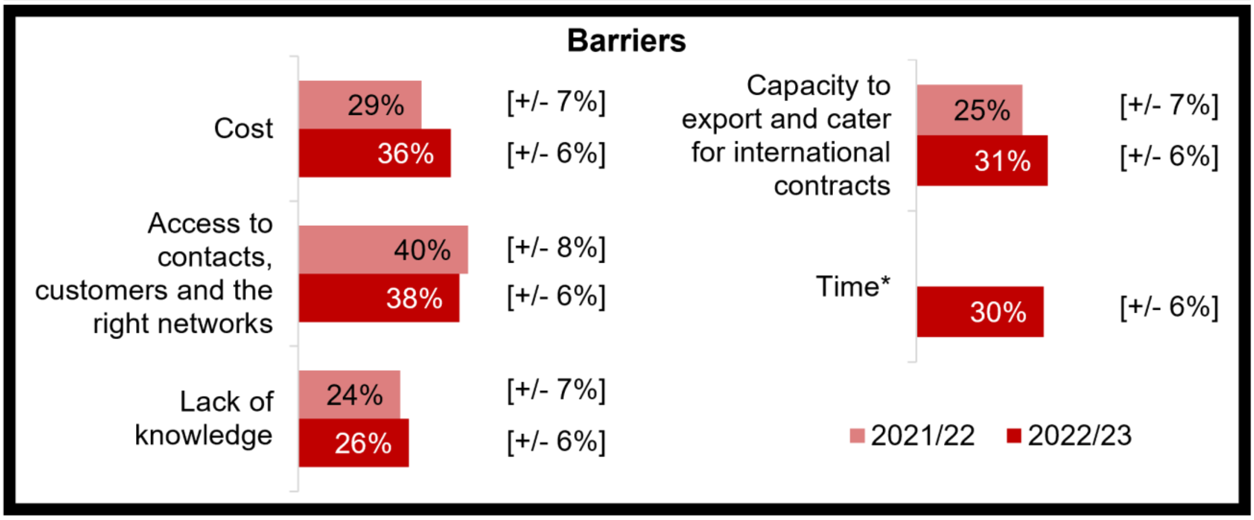
c Cells have been suppressed to protect confidentiality

Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n= (2021/22), n=281 (2022/23)).*

Summary: Export and Investment Teams







*Base: All businesses who used the service (n=166 (2021/22), n=245 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=153 (2021/22), n=228 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=155 (2021/22), n=234 (2022/23)); Exporter status (n=166 (2021/22), n=245 (2022/23)); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=110 (2021/22), n=157 (2022/23)); Size - All businesses who used the service (n=166 (2021/22), n=245 (2022/23)); Barriers - All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=154 (2021/22), n=231 (2022/23)), Cost (n=151 (2021/22), n=226 (2022/23), Lack of knowledge (n=154 (2021/22), n=231 (2022/23)), Capacity to export (n=152 (2021/22), n=228 (2022/23)), Time (n=221). * Code added in 2022/23.*

3.5 Export and Investment Teams

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

This chapter explores satisfaction with the Export and Investment Teams service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on 245 interviews with businesses that used Export and Investment Teams between April 2022 and March 2023.

Key changes since 2021/22:

The NPS for Export and Investment Teams was +16, which was in line with the previous year (+12). Similarly, satisfaction with the service (61%) and ratings of whether the service had met businesses' needs (58%) were broadly in line with the previous year (68% and 61% respectively).

Compared to the previous year, fewer businesses who had identified new opportunities had made a new or expanded business contract (32%, down from 49% in 2021/22).

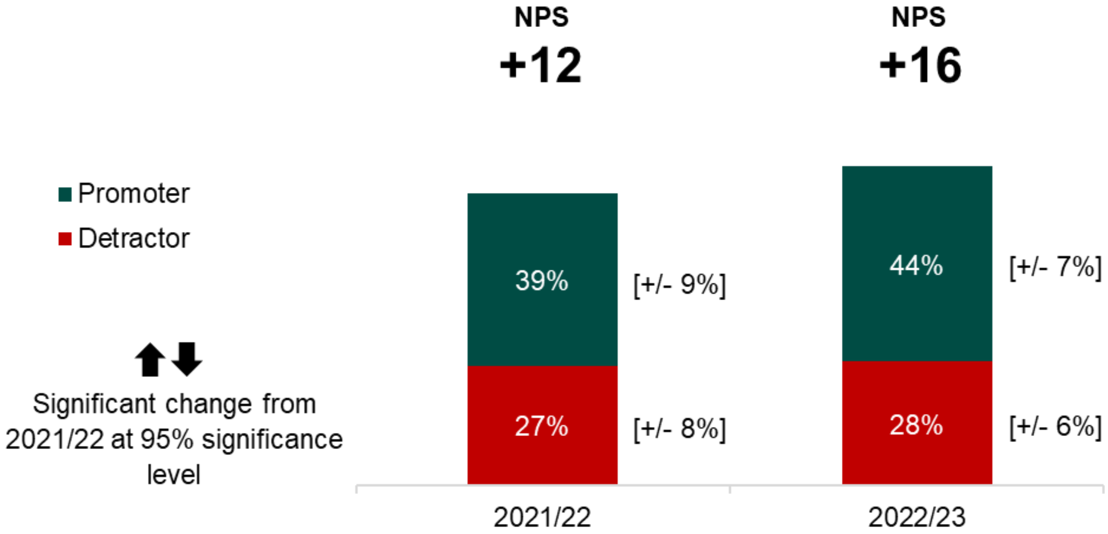
3.5.1 Satisfaction with the Export and Investment Teams service

3.5.1.1 Service performance

Businesses were broadly positive about the Export and Investment Teams service, and many said they would recommend it to colleagues and business associates. Over four in ten (44%) were likely to recommend the service (classified as 'Promoters'), while almost three in ten (28%) were unlikely to recommend the service (classified as 'Detractors').[28] These findings were in line with the previous year.

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

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



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 who used the service (n=166 (2021/22), n=245 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

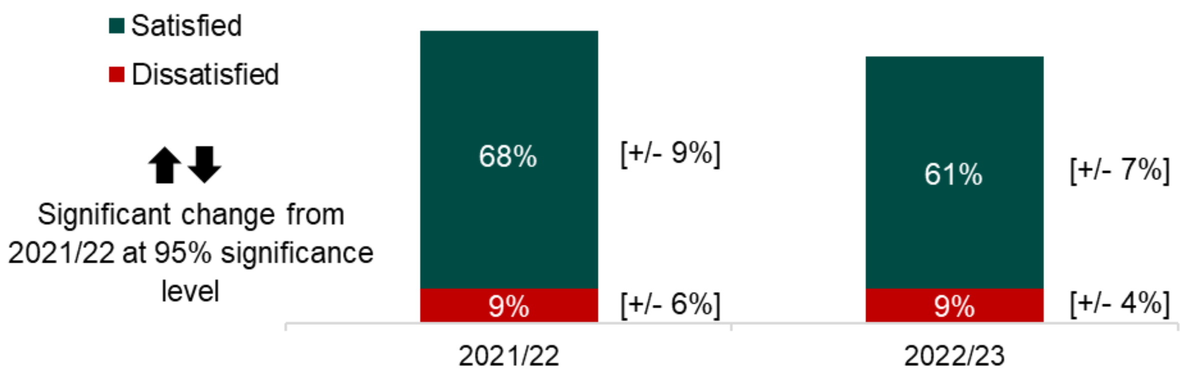
Businesses felt that the service **could be improved** by having better support (40%) and better communication (35%). Looking in more detail, a quarter of businesses suggested support could be more sector or industry specific (24%), and that more communication or information was required (also 24%).

3.5.1.2 Satisfaction

Six in ten (61%) businesses were satisfied with Export and Investment Teams, while one in ten (9%) were dissatisfied.[29] These findings were in line with the previous year.

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

Chart 3.5.2 Satisfaction with service – Export and Investment Teams



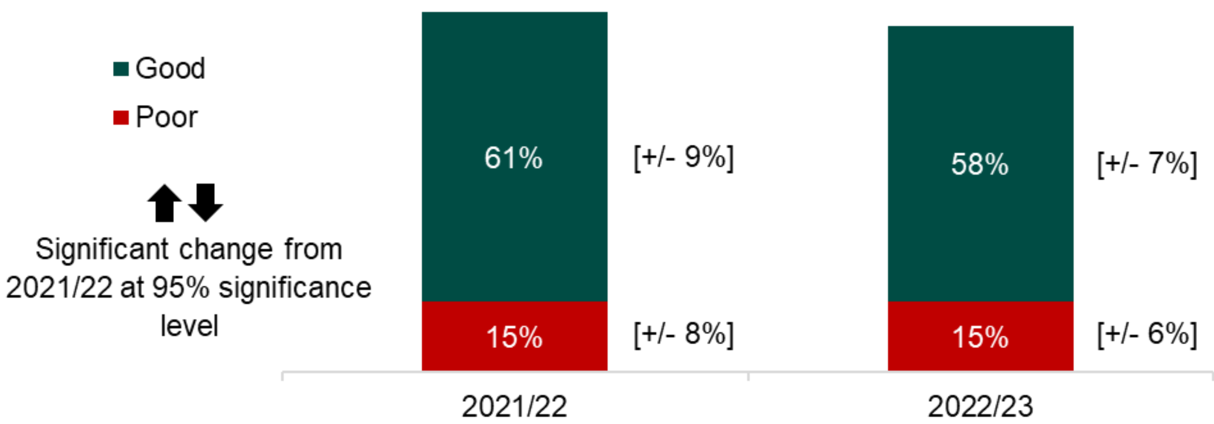
Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n=155 (2021/22), n=234 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

Of the 26 businesses that were dissatisfied with the service (i.e. they rated the service as poor), 15 reported that their **reason for dissatisfaction** was because the service did not meet their expectations, 14 said the service did not give them enough information or advice, and 10 felt DBT did not have enough contact with them.

3.5.1.3 Whether overall service met needs

The majority of businesses said that the overall service provided by Export and Investment Teams had met their needs, with 58% rating it as good and 15% as poor.[30] These findings were in line with the previous year.

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

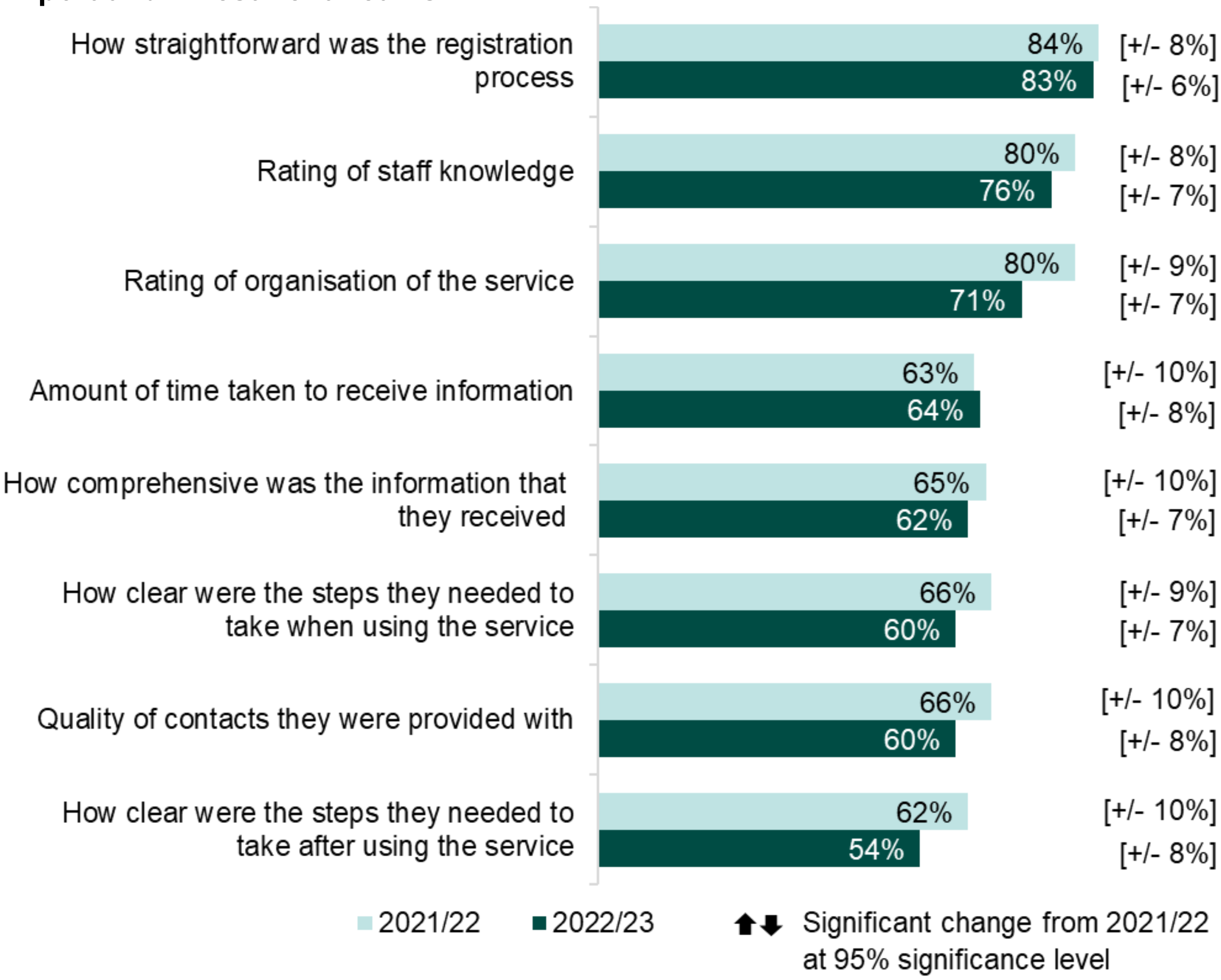


Qualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n=153 (2021/22), n=228 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

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

Businesses were most positive about how straightforward the registration process was (83%), followed by staff knowledge (76%) and the organisation of the service (71%). Businesses were least positive about the clarity of the steps they needed to take after using the service (54%). These findings were in line with the previous year.

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



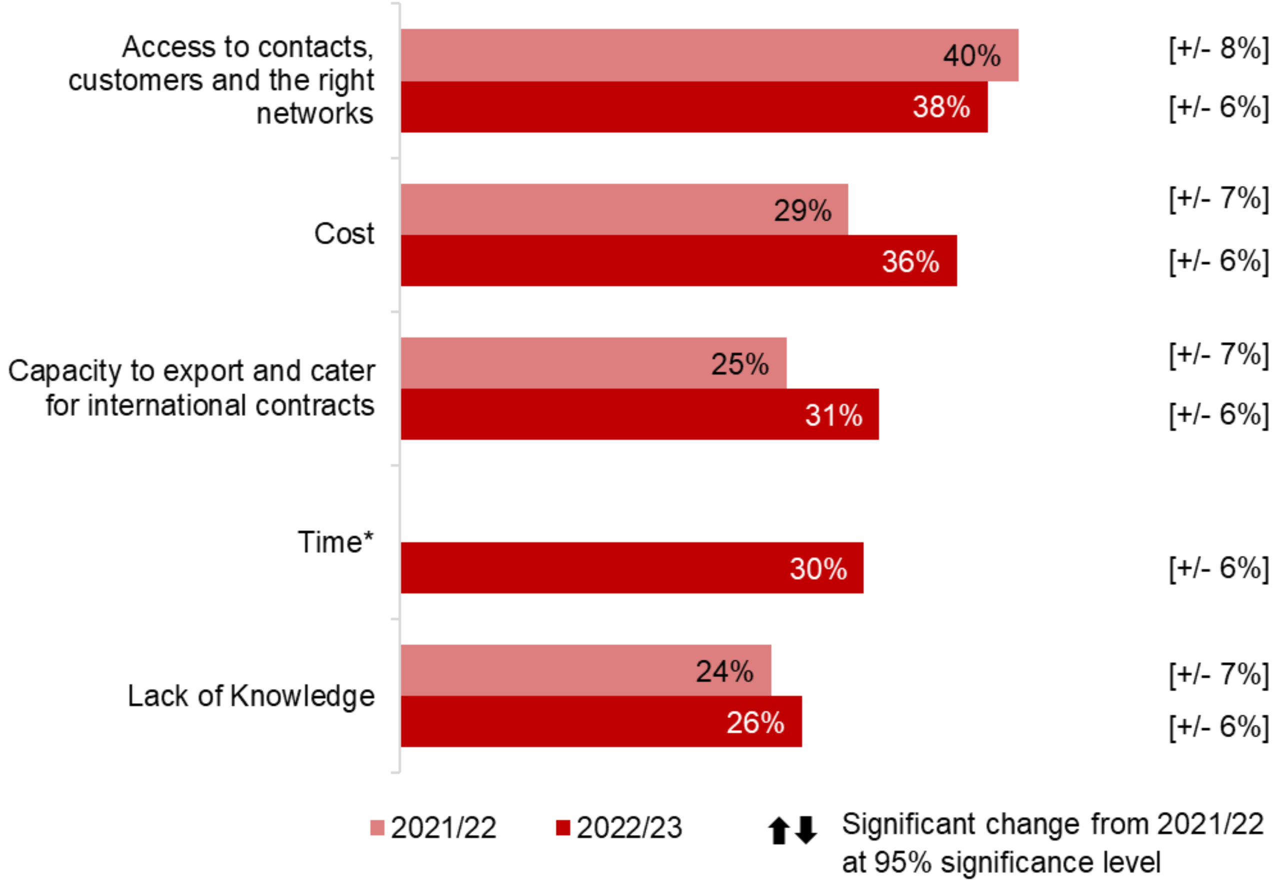
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=148 (2021/22), n=217 (2022/23)). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=134 (2021/22), n=204 (2022/23)). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=141 (2021/22), n=215 (2022/23)). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from the service? (n=144 (2021/22), n=221 (2022/23)). Qclarity_2 – The service made clear what I should do next after using it (n=134 (2021/22), n=207 (2022/23)). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through the service? (n=133 (2021/22), n=199 (2022/23)). Qreg – How straightforward was the registration process for the service? (n=138 (2021/22), n=197 (2022/23)). Qevent – How would you rate the organisation of the service? (n=143 (2021/22), n=215 (2022/23)). Base: All businesses who used the service (excluding 'not applicable' responses). 'Negative', 'Neutral' and 'Don't know' responses not shown.

3.5.2 Outcomes of using the Export and Investment Teams service

3.5.2.1 Counteracting the barriers to exporting

Businesses that used Export and Investment Teams reported facing barriers to exporting. Two in five (38%) reported that access to contacts, customers and the right networks was a barrier. This was followed by cost (36%), capacity to export and cater for international contracts (31%), time (30%) and lack of knowledge (26%). These findings were in line with the previous year (note that 'time' was a new barrier added in 2022/23).

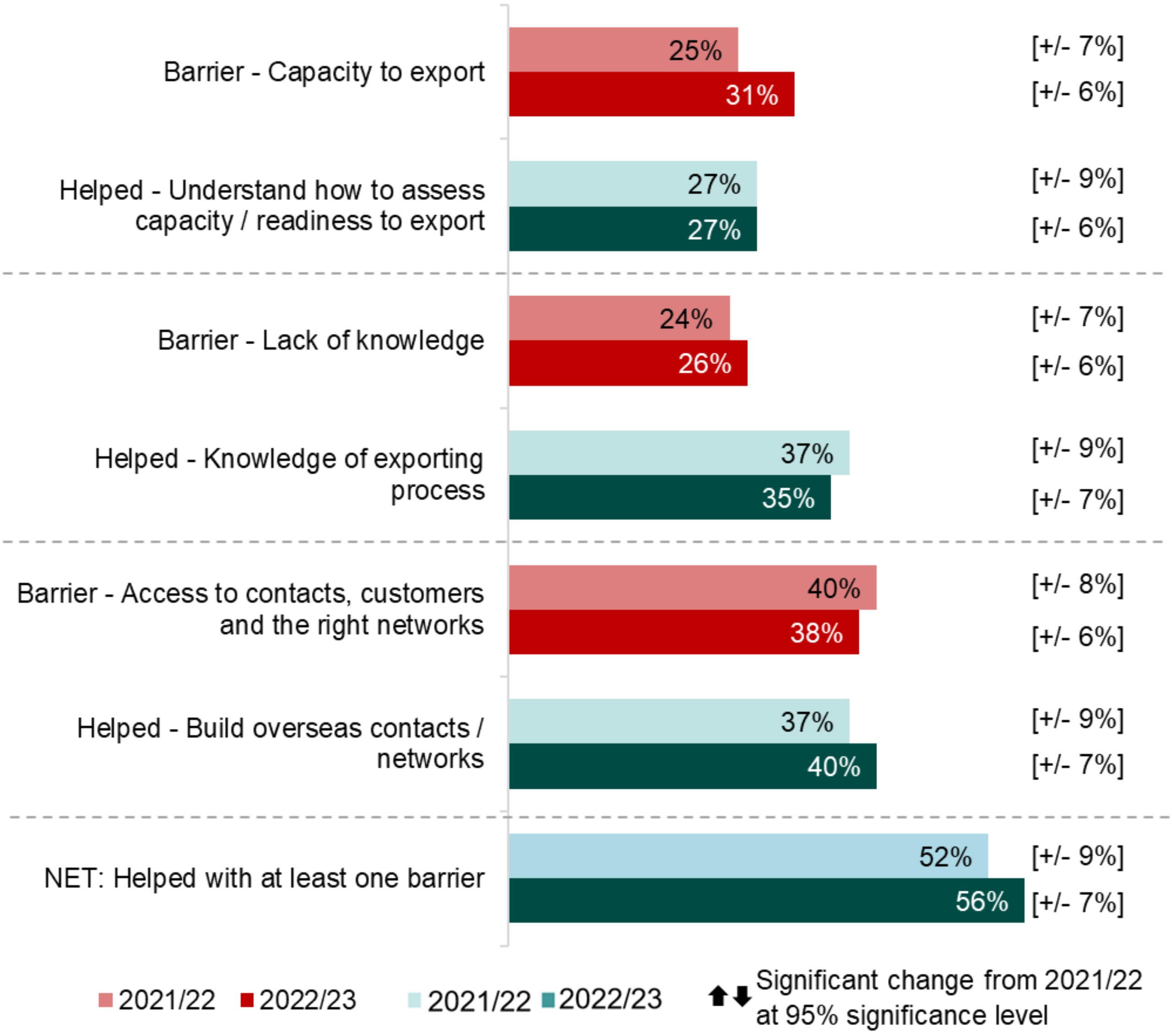
Chart 3.5.5 Barriers to exporting – Export and Investment Teams



*Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=154 (2021/22), n=231 (2022/23)), Cost (n=151 (2021/22), n=226 (2022/23)), Lack of knowledge (n=154 (2021/22), n=231 (2022/23)), Capacity to export (n=152 (2021/22), n=228 (2022/23)), Time (n=221). 'Neutral', 'Not a barrier' and 'Don't know' responses not shown. * Code added in 2022/23.*

Businesses were asked whether using Export and Investment Teams (and therefore DBT services) had helped them to **overcome these barriers** to exporting. Overall, the majority of businesses reported that using the Export and Investment Teams service had helped them to overcome at least one barrier (56%), in particular around building overseas contacts and networks (40%), knowledge of the exporting process (35%), and understanding how to assess capacity or readiness to export (27%). These findings were in line with the previous year.

Chart 3.5.6 Barriers to exporting and how DBT helped – Export and Investment Teams



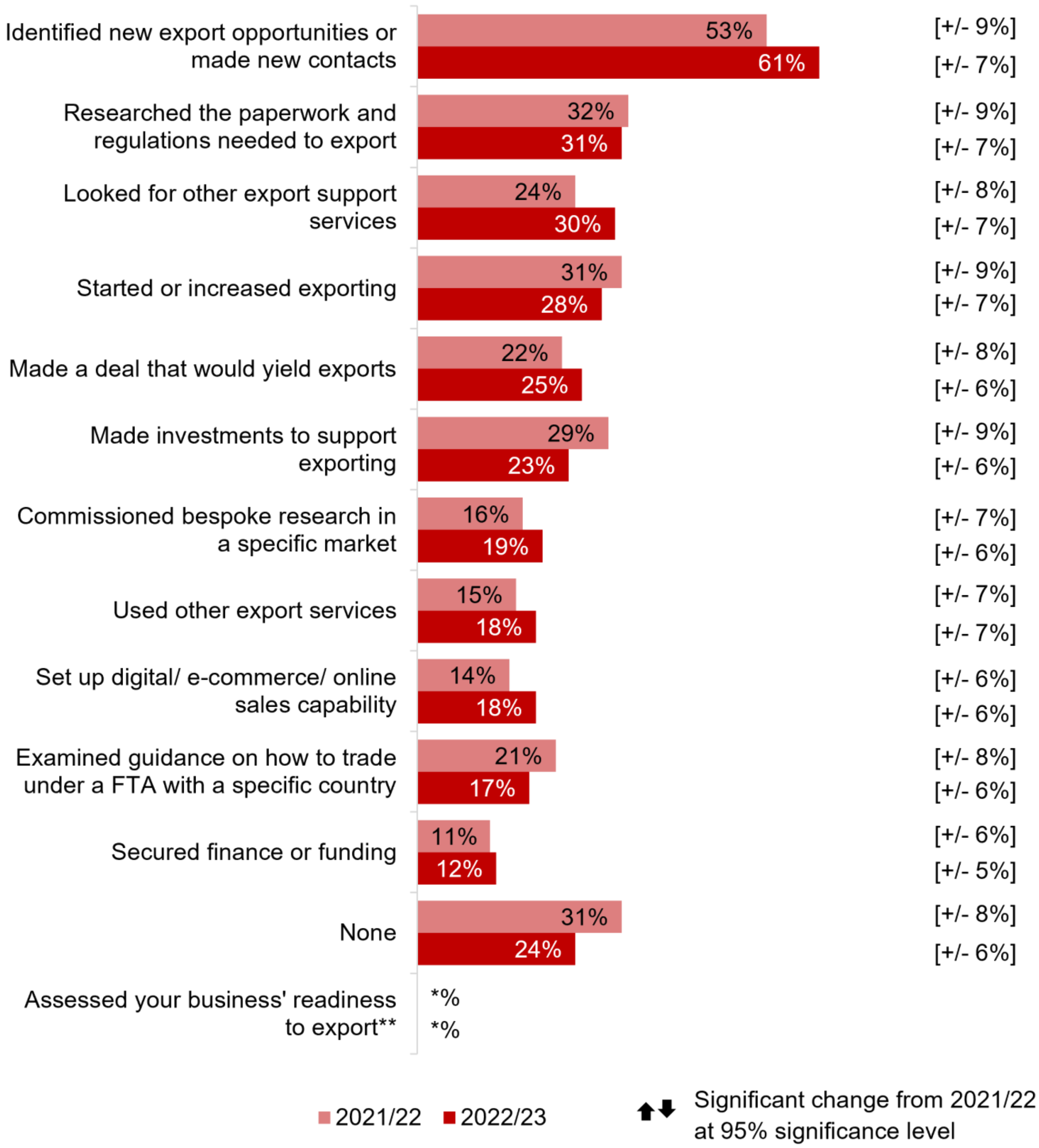
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=154 (2021/22), n=231 (2022/23)), Lack of knowledge (n=154 (2021/22), n=231 (2022/23)), Capacity to export (n=152 (2021/22), n=228 (2022/23))).
Qknowchange – Using the same scale as before, thinking about your experience of the service, to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks / understand how to assess capacity and readiness to export? Base: All businesses who used the service (n=166 (2021/22), n=245 (2022/23)).

3.5.2.2 Taking action

Businesses had taken a range of actions as a result of using Export and Investment Teams.

Among all businesses, six in ten (61%) reported that they had identified new export opportunities or made new contacts, followed by researching the paperwork and regulations needed to export (31%), and looking for other export support services (30%). These findings were in line with the previous year.

Chart 3.5.7 Actions taken as a result of service interaction – Export and Investment Teams



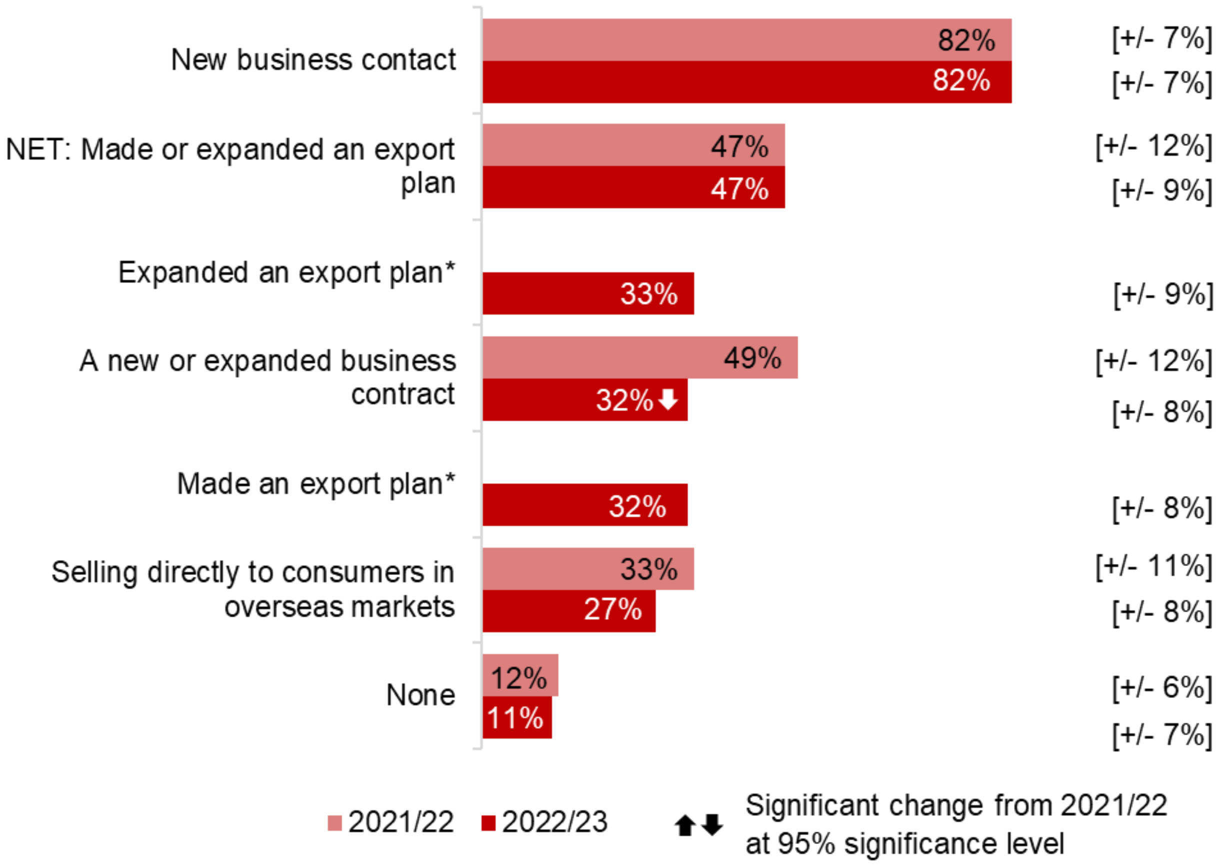
Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n=166 (2021/22), n=245 (2022/23)); Non-exporters (n= (2021/22), n=* (2022/23)). Only prompted codes are shown. ** Asked to non-exporters only. * Redacted due to small base size*

3.5.2.3 Identifying new opportunities

As a result of using Export and Investment Teams, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (82%), followed by made or expanded an export plan (47%).

Compared to the previous year, fewer businesses who had identified opportunities had made a new or expanded business contract (32%, down from 49% in 2021/22). Other findings were in line with the previous year.

Chart 3.5.8 Identifying new opportunities – Export and Investment Teams

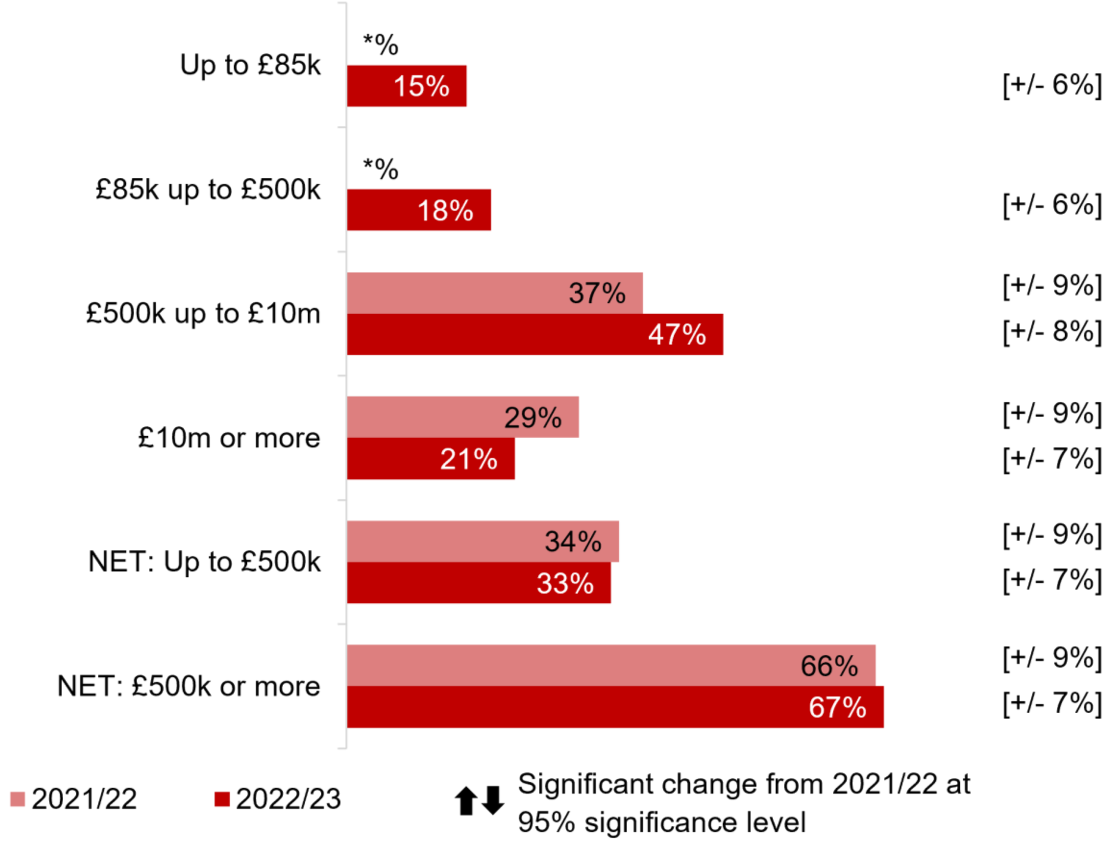


*Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All businesses who used the service who had identified a new business contact as part of the DBT service (n=103 (2021/22), n=160 (2022/23)). Only prompted codes are shown. * Codes split out in 2022/23.*

3.5.3 Service use by firmographics and export behaviour

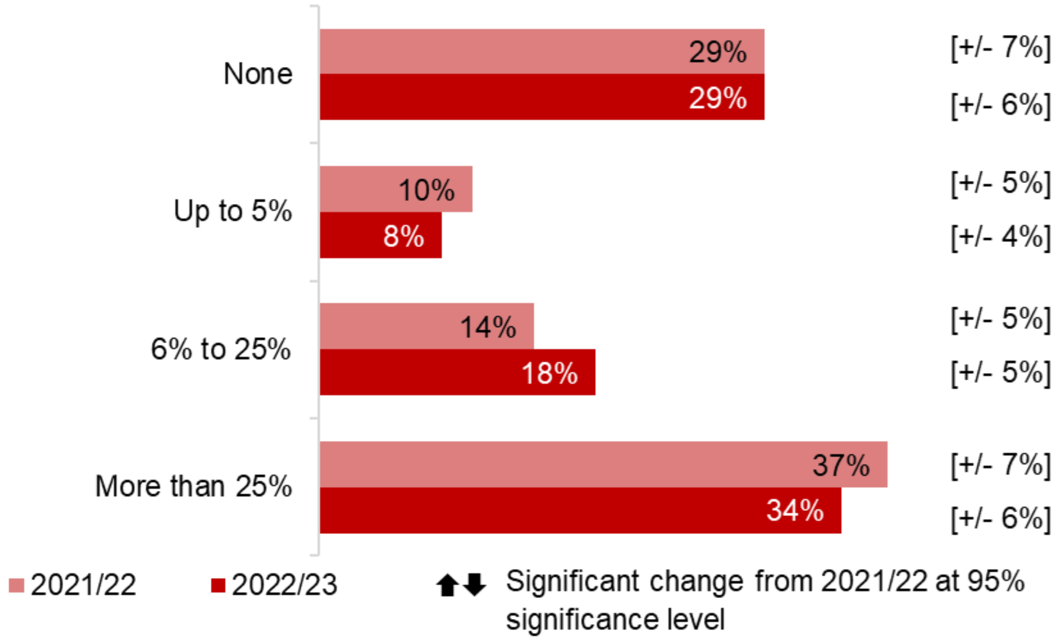
Two-thirds of businesses that used Export and Investment Teams had a high turnover of £500,000 or more (67%). Meanwhile, a third had lower turnovers (33%) of up to £500,000. A third of businesses (34%) reported that more than a quarter of their turnover came from exporting. These findings were in line with the previous year.

Chart 3.5.9 Turnover – Export and Investment Teams



*Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational businesses)? Base: All businesses who used the service (excluding Don't know/Refused) (n=110 (2021/22), n=157 (2022/23)). * Redacted*

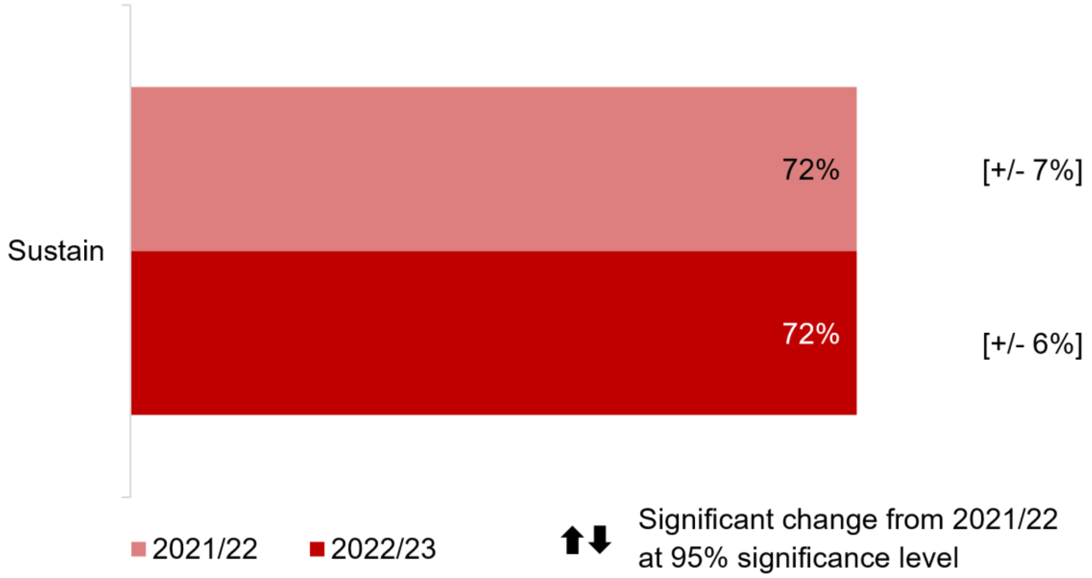
Chart 3.5.10 Proportion of turnover from exporting – Export and Investment Teams



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n=166 (2021/22), n=245 (2022/23)). 'Don't know' and 'Refused' responses not shown

Current exporters made up the majority of businesses using the Export and Investment Teams service. Seven in ten businesses (72%) were currently exporting (classified as 'Sustain')[31] These findings were in line with the previous year.

Chart 3.5.11 Exporter status – Export and Investment Teams

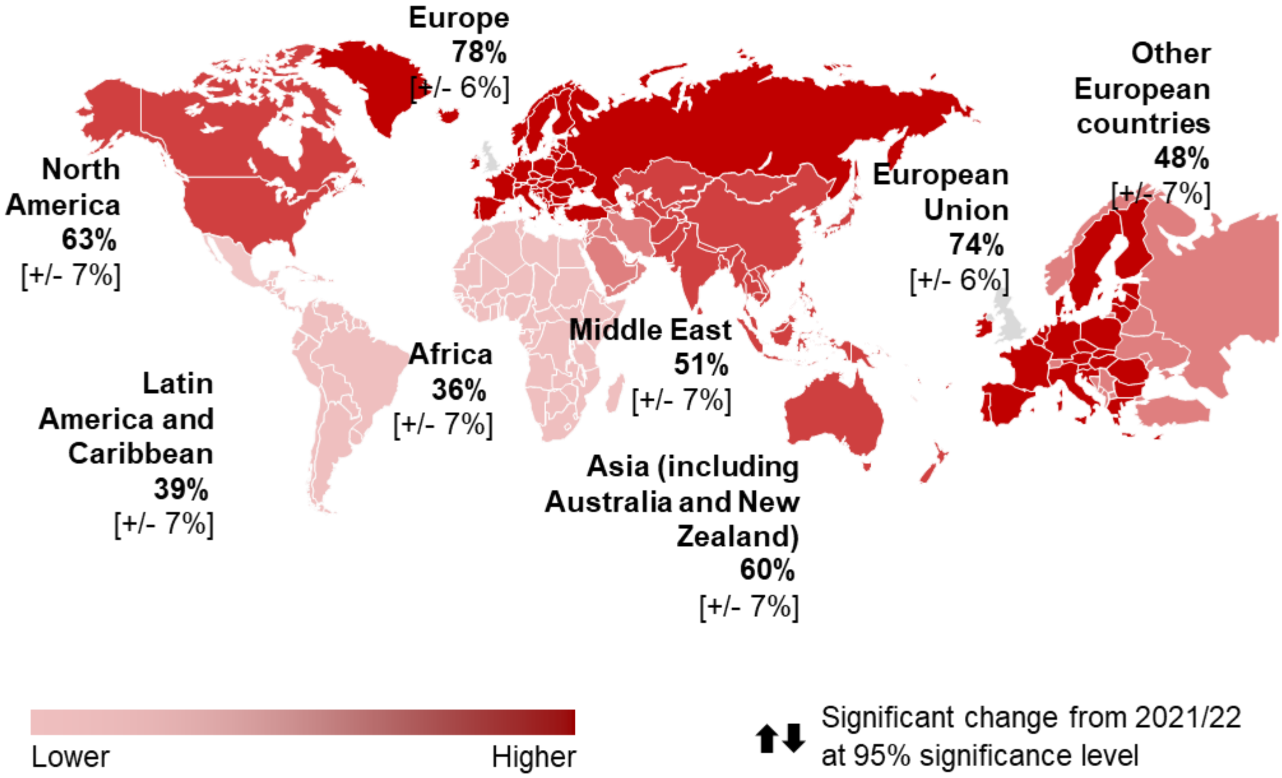


Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n=166 (2021/22), n=245 (2022/23)).

Europe remained the most common export market among Export and Investment Teams businesses. Among those who were currently exporting or had done so previously, almost eight in ten (78%) exported to Europe, including 74% to the European Union, followed by North America (63%) and Asia (60%). These findings were in line with the previous year.

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

Chart 3.5.12 Regions organisations export to or exported to previously – Export and Investment Teams



Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n=127 (2021/22), n=187 (2022/23)).

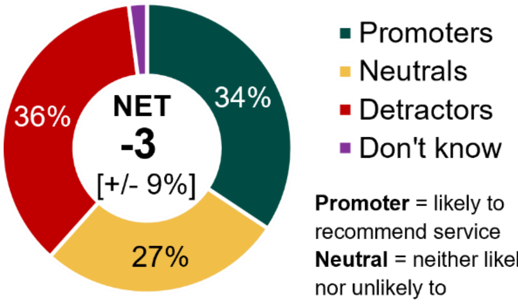
Table 3.5.1 Regions organisations export to or exported to previously – Export and Investment Teams

Region	% (21/22)	CI (+/-) (21/22)	% (22/23)	CI (+/-) (22/23)	Change
Europe	72%	7%	78%	6%	-
European Union	73%	8%	74%	6%	-
Other European countries	40%	9%	48%	7%	-
Asia (including Australia and New Zealand)	61%	9%	60%	7%	-
Middle East	54%	9%	51%	7%	-
North America	52%	9%	63%	7%	-
Africa	35%	8%	36%	7%	-
Latin America and Caribbean	32%	8%	39%	7%	-

Qcurexp – Do you currently or did you export to any of the following regions? Base: All respondents who used the service and who have exported (n=127 (2021/22), n=187 (2022/23)).

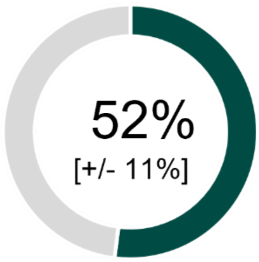
Summary: Export Support Service – Service Delivery Centre (ESS-SDC)

Net Promoter Score

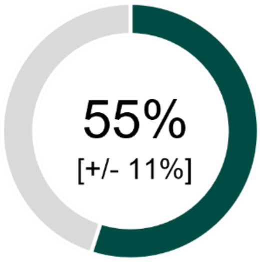


Promoter = likely to recommend service
Neutral = neither likely nor unlikely to recommend service
Detractor = unlikely to recommend service

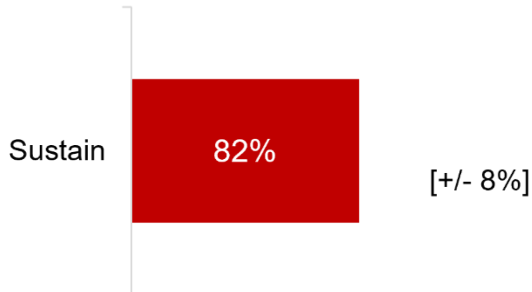
Overall service met needs



Satisfaction with service



Exporter status



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

Base: All businesses who used the service (n=103); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=101); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=102); Exporter status (n=103); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=); Size - All businesses who used the service (n=103); Barriers - **
**Redacted due to small base size*

3.6 Export Support Service – Service Delivery Centre (ESS-SDC)

The ESS-SDC is an advice and signposting service designed to respond to enquiries from businesses about exporting product or service to Europe. Businesses can ask questions for their business, including on exporting to new markets, paperwork, and rules for a specific country. ESS-SDC service deliveries were only recorded for the ECS if escalated through Policy Hub and EU MAC queries.

This chapter explores satisfaction with the ESS-SDC (referrals only) service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 103 businesses who used ESS-SDC (referrals only) between April 2022 and March 2023.

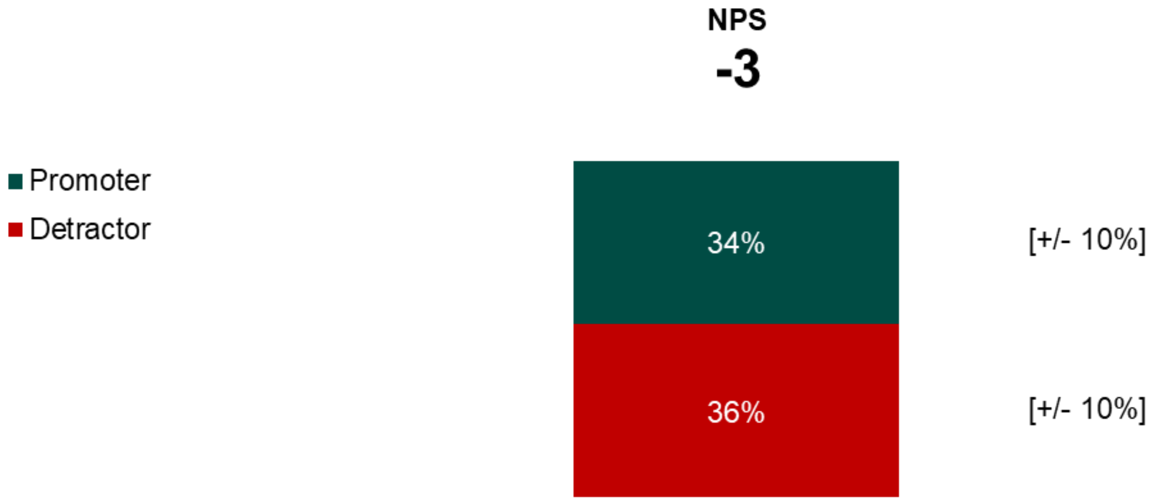
ESS-SDC (referrals only) was first introduced to the Export Client Survey in April 2022. Therefore, this report does not include any comparisons to findings from the previous year.

3.6.1 Satisfaction with the ESS-SDC (referrals only) service

3.6.1.1 Service performance

Businesses had mixed opinions about the ESS-SDC (referrals only) service and were equally likely to recommend it to colleagues and business associates as they were unlikely to recommend it. A third of businesses (34%) were 'Promoters', i.e. likely to recommend the service, and a similar proportion (36%) were 'Detractors', i.e. unlikely to recommend the service.[32] The NPS for ESS-SDC (referrals only) was -3.

Chart 3.6.1 Likelihood of recommending service (NPS) – ESS-SDC (referrals only)



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 who used the service (n=103). 'Neutral' and 'Don't know' responses not shown.

When asked about **suggestions to improve the service**, a third of businesses mentioned improved communication (32%), and over a quarter mentioned better support (28%).

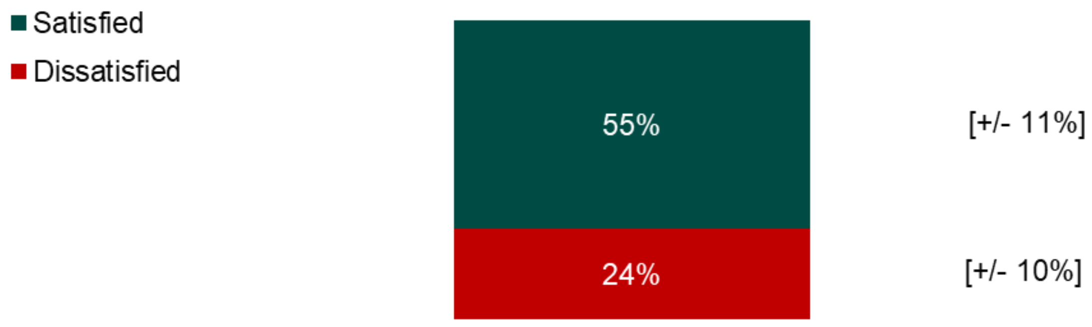
[32] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

Specifically, the most frequently suggested improvement for the service was more communication or information (22%), followed by more knowledgeable staff (20%) and better-quality information (12%).

3.6.1.2 Satisfaction

Over half (55%) of ESS-SDC (referrals only) users were satisfied with the service, and a quarter (24%) said they were dissatisfied.[33]

Chart 3.6.2 Satisfaction with service – ESS-SDC (referrals only)



Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n=102). 'Neutral' and 'Don't know' responses not shown.

Of the 24 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction**[34] was feeling that the service did not give enough information or advice; 18 businesses reported this. Another 12 businesses felt that the service did not meet their expectations.

3.6.1.3 Whether overall service met needs

Businesses were somewhat positive that the ESS-SDC (referrals only) service had met their needs; half (52%) rated it as good. However, a third of businesses (31%) rated it as poor.[35]

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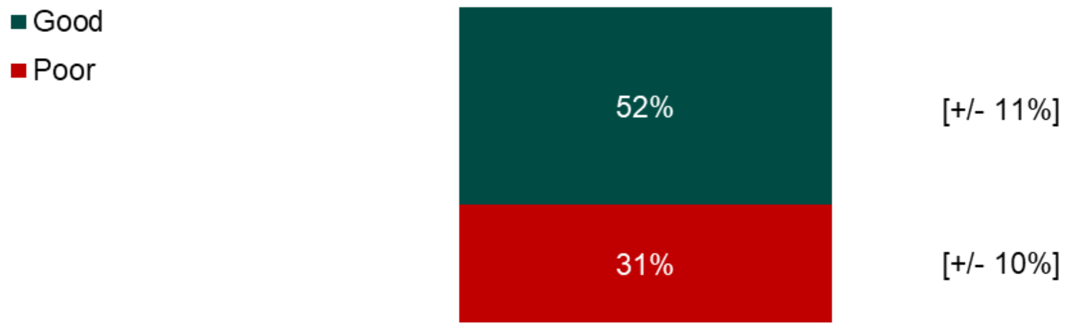
[33] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.
[34] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has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

Chart 3.6.3 Rating of whether overall service met needs – ESS-SDC (referrals only)



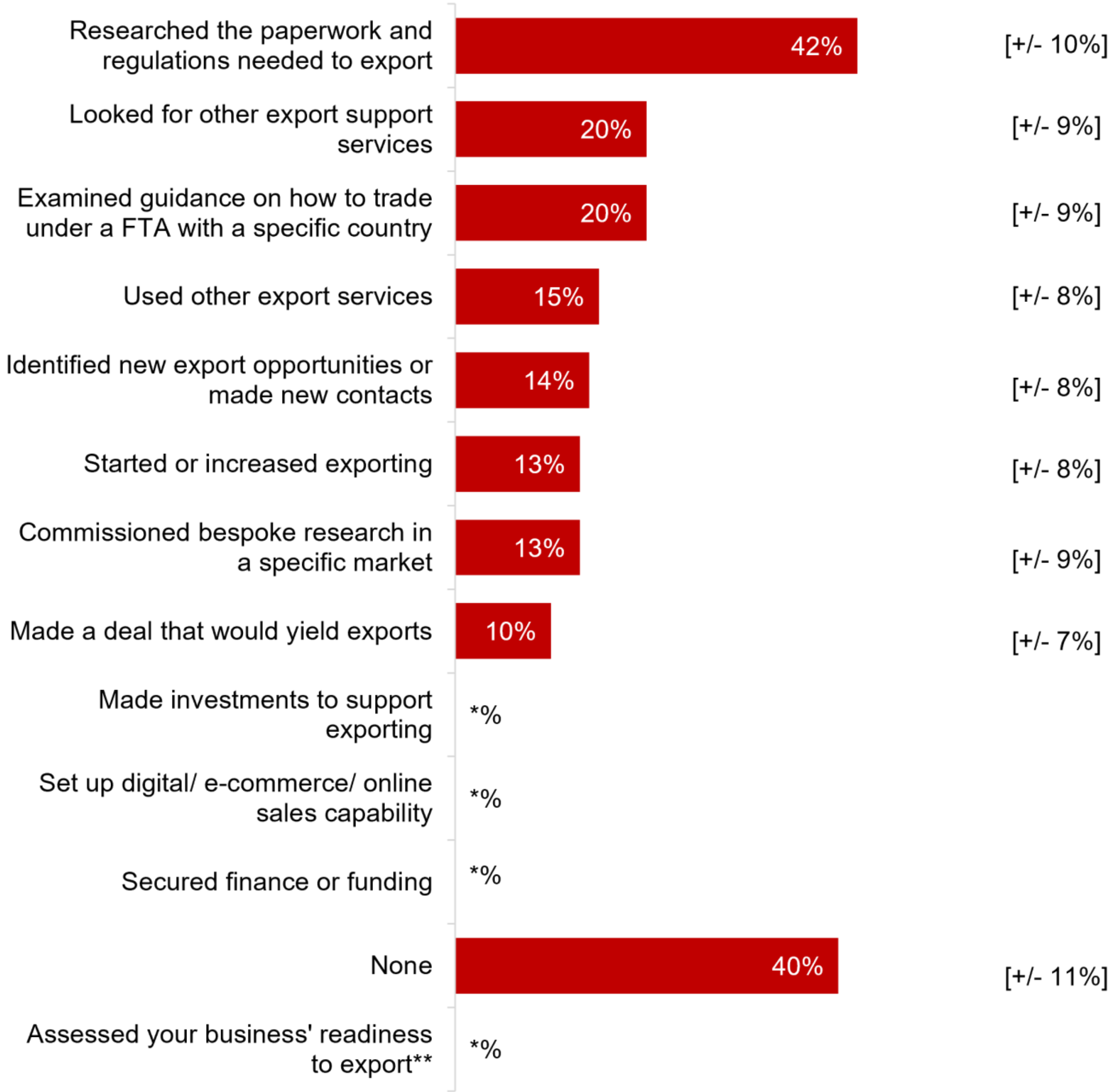
Qualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n=101). 'Neutral' and 'Don't know' responses not shown.

3.6.2 Outcomes of using the ESS-SDC (referrals only) service

3.6.2.1 Taking action

Businesses had taken a range of actions as a result of using ESS-SDC (referrals only). Among all businesses, two in five (42%) said they had researched the paperwork and regulations needed to export, and one in five had looked for other export support services (20%) or examined guidance on how to trade under an FTA with a specific country (20%). Two in five (40%) had taken no action as a result of using ESS-SDC (referrals only).

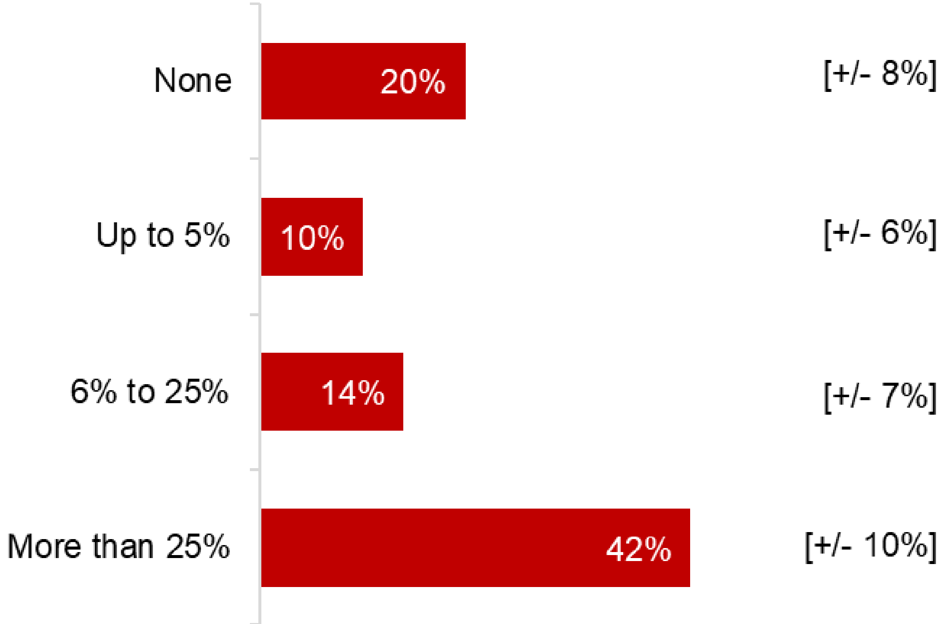
Chart 3.6.4 Actions taken as a result of service interaction – ESS-SDC (referrals only)



Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n=103); Non-exporters (n=). Only prompted codes are shown. **Asked to non-exporters only. * Redacted due to small base size.*

3.6.3 Service use by firmographics and export behaviour

Chart 3.6.5 Proportion of turnover from exporting – ESS-SDC (referrals only)



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n=103). 'Don't know' and 'Refused' responses not shown

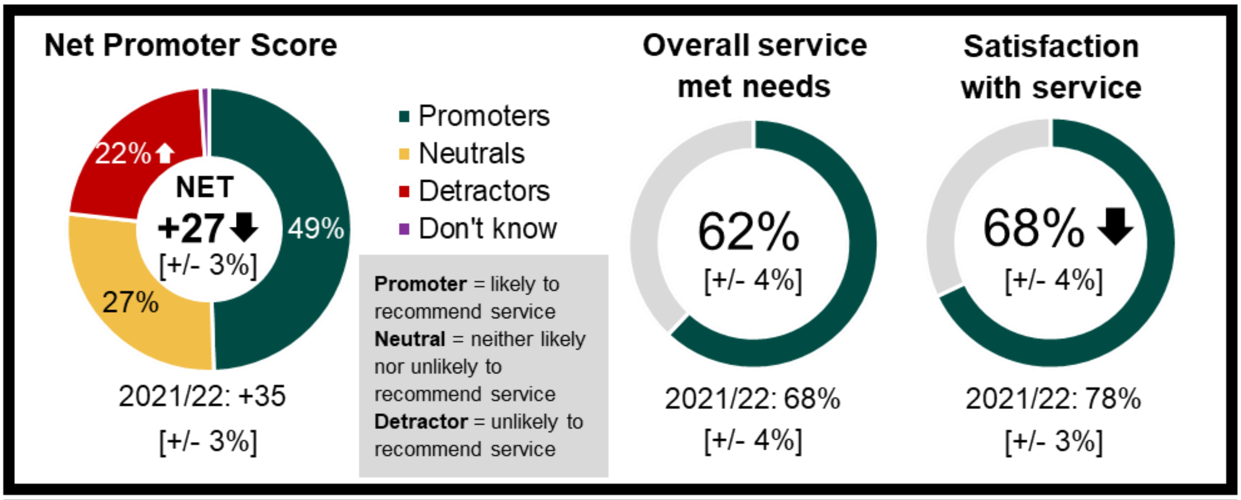
Current exporters made up the majority of businesses using the ESS-SDC (referrals only) service. Over four in five businesses (82%) were currently exporting ('Sustain').[36]

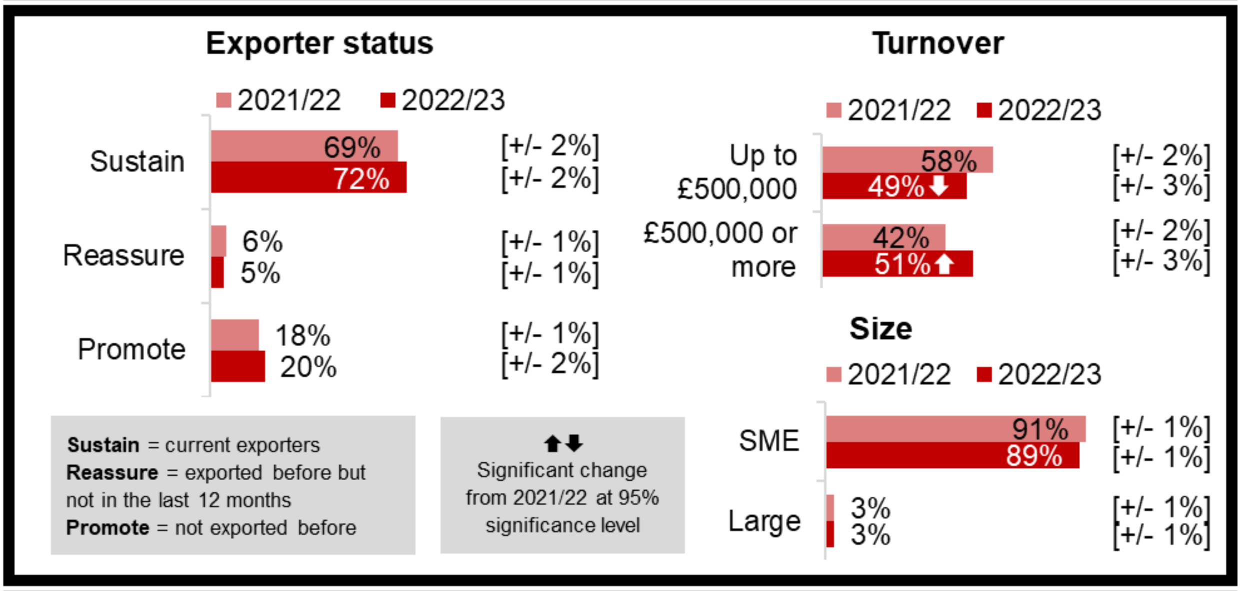
Chart 3.6.6 Exporter status – ESS-SDC (referrals only)

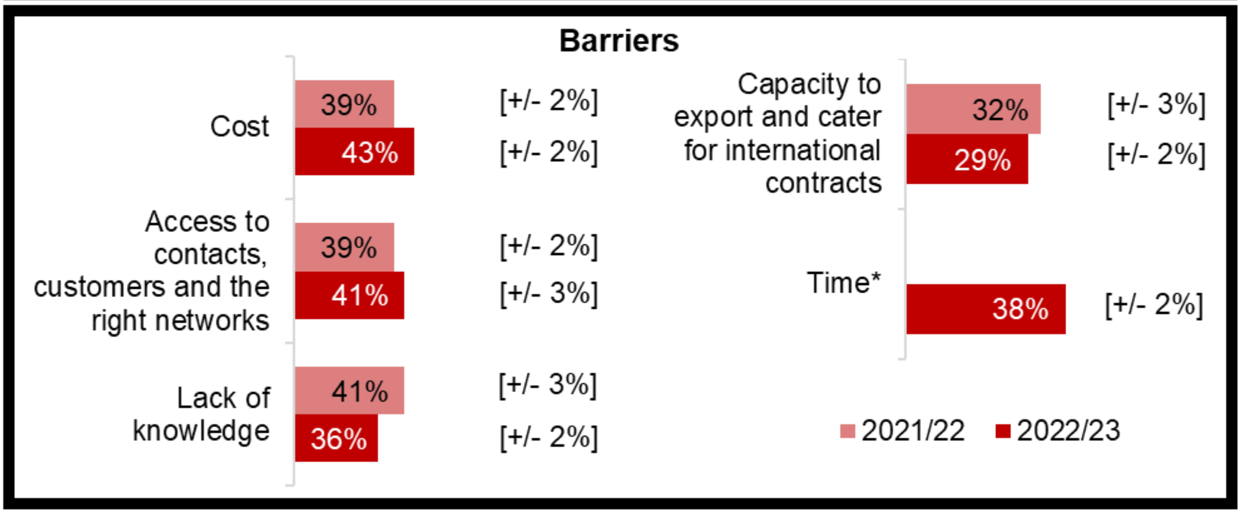
Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n=103).

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

Summary: Export Academy







*Base: All businesses who used the service (n=654 (2021/22), n=914 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=634 (2021/22), n=882 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=648 (2021/22), n=903 (2022/23)); Exporter status (n=654 (2021/22), n=914 (2022/23)); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=407 (2021/22), n=563 (2022/23)); Size - All businesses who used the service (n=654 (2021/22), n=914 (2022/23)); Barriers - All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=644 (2021/22), n=893 (2022/23)), Cost (n=634 (2021/22), n=886 (2022/23)), Lack of knowledge (n=639 (2021/22), n=892 (2022/23)), Capacity to export (n=634 (2021/22), n=883 (2022/23)), Time (n=881). * Code added in 2022/23.*

3.7 Export Academy

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

This chapter explores satisfaction with the Export Academy service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 914 businesses who used Export Academy between April 2022 and March 2023.

Key changes since 2021/22:

The NPS for Export Academy was +27, which was lower than the NPS of +35 in the previous year (2021/22). Satisfaction with the service was high, with 68% of Export Academy businesses saying they were satisfied, although this was also lower than in the previous year (78%). Three in five (62%) users reported the overall service met their needs, broadly consistent with findings from 2021/22.

Compared to the previous year, businesses were less positive about several metrics relating to the service, including staff knowledge (85%, down from 90% in 2021/22), how comprehensive the information they received was (78%, down from 84%), the amount of time taken to receive information (72%, down from 82%), and the clarity of the steps they needed to take when using the service (72%, down from 78%) and after using the service (59%, down from 70%).

However, Export Academy businesses were also more likely to have taken actions as a result of using service compared to 2021/22. In particular, there were increases in the proportion of businesses who had identified new export opportunities or made new contacts (43%, up from 38% in 2021/22), looked for other export support services (34%, up from 26%), made investments to support exporting (23%, up from 16%), used other export services (22%, up from 15%), and secured finance or funding (11%, up from 8%). However, businesses using Export Academy were less likely to have started or increased exporting (16%, down from 21% in 2021/22).

The population of businesses supported by the Export Academy service was largely consistent with the previous year in terms of size and export status. However, more businesses reported having higher turnovers of £500,000 or more (51%, up from 42% in 2021/22), with a corresponding decrease in the proportion of businesses with lower turnovers of up to £500,000 (49%, down from 58%).

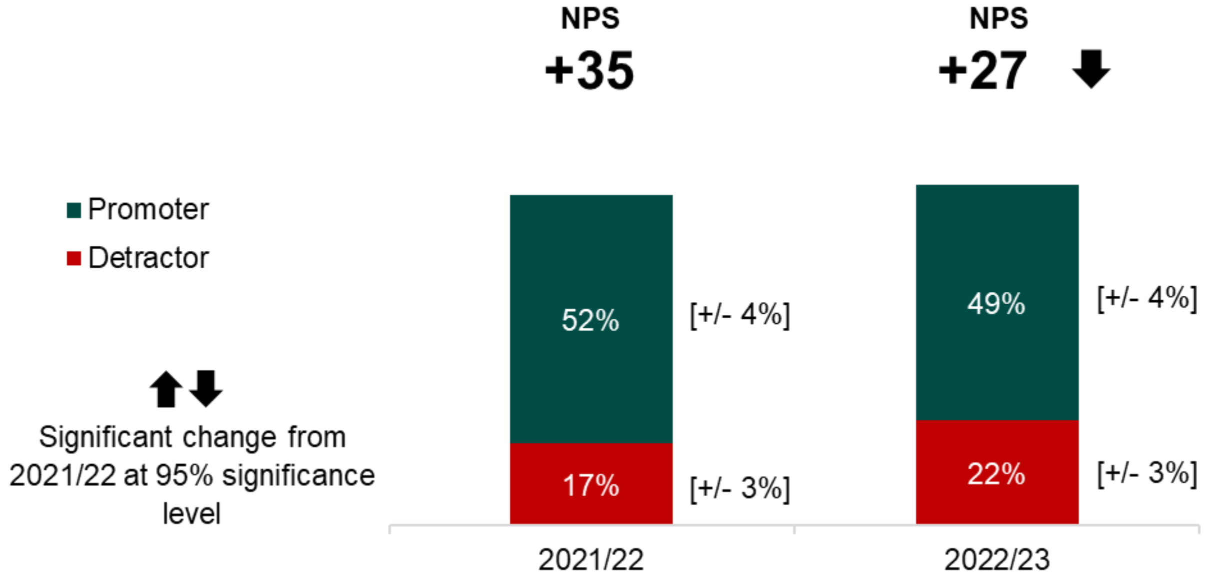
3.7.1 Satisfaction with the Export Academy service

3.7.1.1 Service performance

Businesses were somewhat positive about the Export Academy service. Around half of respondents (49%) were 'Promoters', i.e. likely to recommend the service, and a fifth

(22%) were ‘Detractors’, i.e. unlikely to recommend the service.[37] This gave a Net Promoter Score (NPS) of +27, which was down from +35 in 2021/22.

Chart 3.7.1 Likelihood of recommending service (NPS) – Export Academy



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 who used the service (n=654 (2021/22), n=914 (2022/23)). ‘Neutral’ and ‘Don’t know’ responses not shown.

When asked about **suggestions to improve the service**, more than a third of businesses mentioned better support (37%), while a quarter mentioned communication in some capacity (26%). Specifically, the most frequently suggested improvement for the service was introducing more sector or industry specific services (26%), followed by more communication or information (16%) and better-quality information (11%).

3.7.1.2 Satisfaction

Satisfaction with the service was high among Export Academy businesses, with 68% saying they were satisfied and 7% saying they were dissatisfied. However, satisfaction was down compared to the previous year (68%, down from 78% in 2021/22), and dissatisfaction was up (7%, up from 4% in 2021/22).[38]

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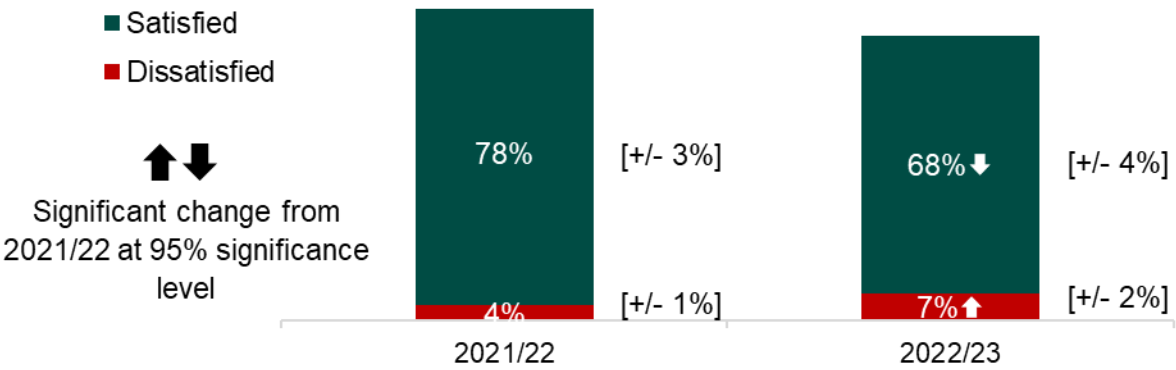
[37] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

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

Chart 3.7.2 Satisfaction with service – Export Academy



Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n=648 (2021/22), n=903 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

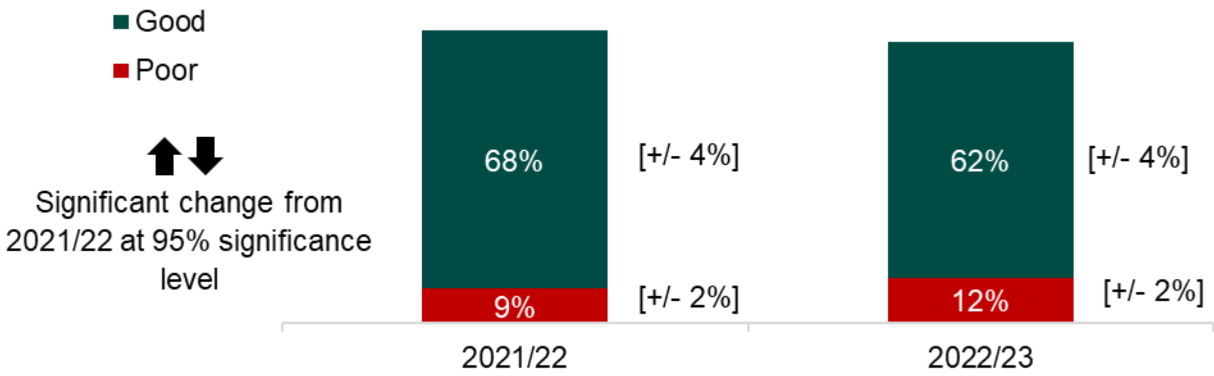
Of those who were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction**[39] was feeling that the service did not give them enough information or advice (56%), followed by the service not meeting expectations (38%), and feeling that the advice given was more relevant to different types of business (27%).

3.7.1.3 Whether overall service met needs

Most businesses were positive that the Export Academy service had met their needs, with 62% rating it as good, and 12% rating it as poor.[40] This was broadly in line with the previous year.

[39] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size (n=71), results should be treated with caution.
[40] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.

Chart 3.7.3 Rating of whether overall service met needs – Export Academy

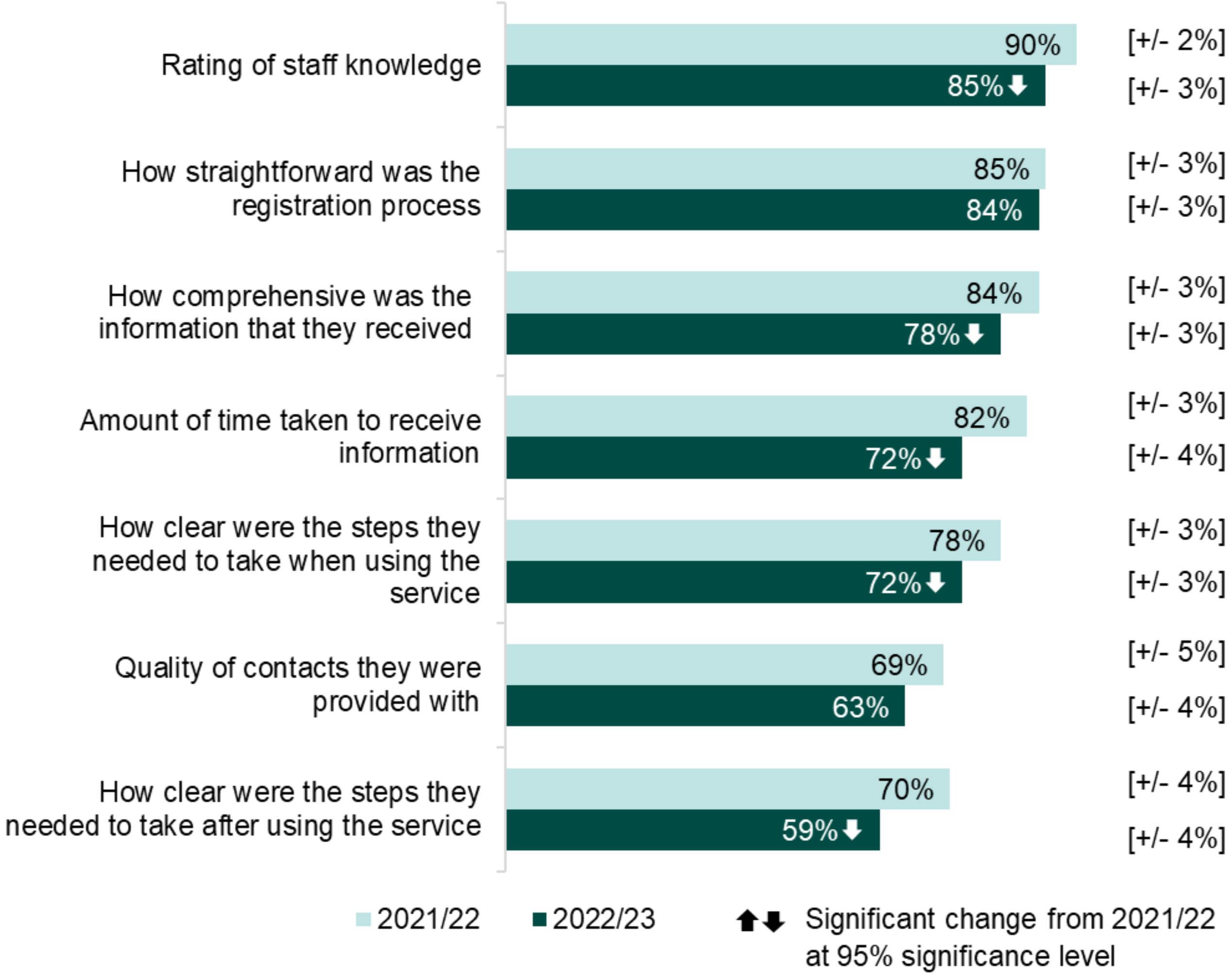


Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n=634 (2021/22), n=882 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

Businesses were most positive about staff knowledge (85%) and how straightforward the registration process was (84%). However, compared to the previous year, businesses were less positive about several metrics, including staff knowledge (85%, down from 90% in 2021/22), how comprehensive the information they received was (78%, down from 84%), the amount of time taken to receive information (72%, down from 82%), and the clarity of the steps they needed to take when using the service (72%, down from 78%) and after using the service (59%, down from 70%).[41]

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

Chart 3.7.4 Rating by business of the specific advice and support they received – Export Academy



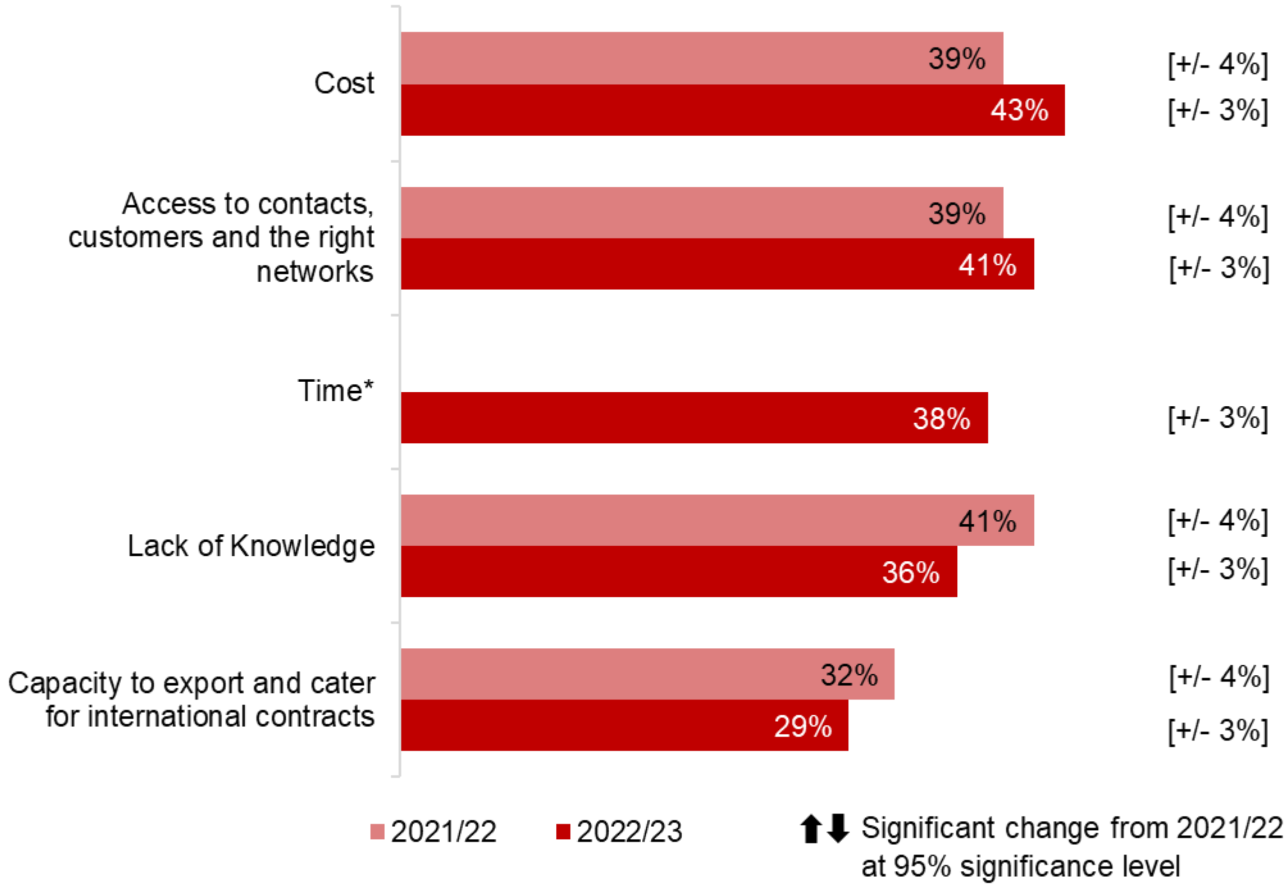
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=620 (2021/22), n=854 (2022/23)). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=591 (2021/22), n=787 (2022/23)). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=634 (2021/22), n=871 (2022/23)). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from the service? (n=636 (2021/22), n=882 (2022/23)). Qclarity_2 – The service made clear what I should do next after using it (n=624 (2021/22), n=863 (2022/23)). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through the service? (n=438 (2021/22), n=634 (2022/23)). Qreg – How straightforward was the registration process for the service? (n=621 (2021/22), n=864 (2022/23)). Base: All businesses who used the service (excluding 'not applicable' responses). 'Negative', 'Neutral' and 'Don't know' responses not shown.

3.7.2 Outcomes of using the Export Academy service

3.7.2.1 Counteracting the barriers to exporting

Businesses that used the Export Academy service reported facing barriers to exporting. Around two in five reported cost (43%), access to contacts, customers and the right networks (41%) and time (38%) as barriers, while over a third (36%) reported lack of knowledge as a barrier. Businesses were least likely to cite their capacity to export and cater for international contracts as a barrier to exporting (29%). These results were in line with the previous year.

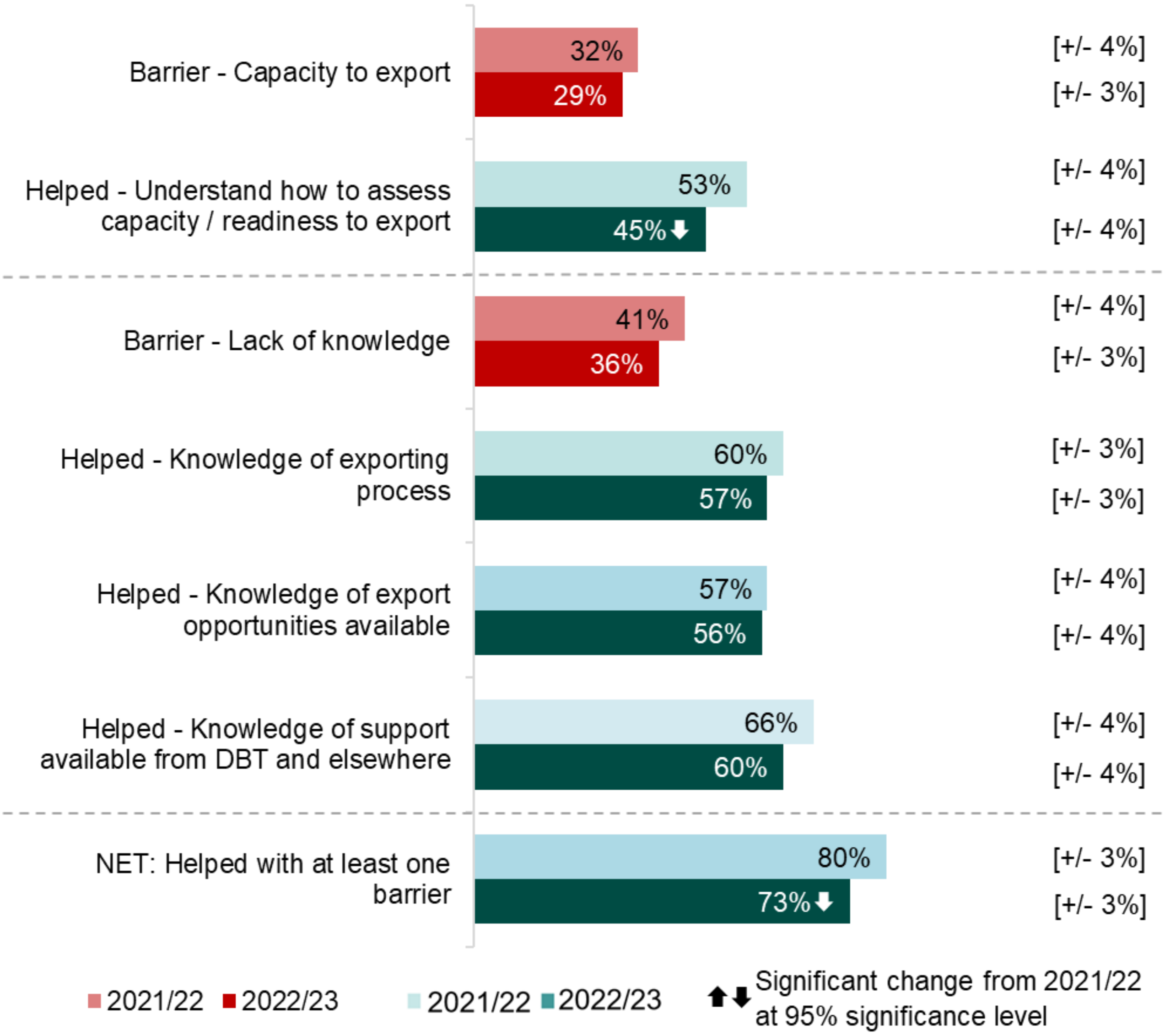
Chart 3.7.5 Barriers to exporting – Export Academy



*Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=644 (2021/22), n=893 (2022/23)), Cost (n=634 (2021/22), n=886 (2022/23)), Lack of knowledge (n=639 (2021/22), n=892 (2022/23)), Capacity to export (n=634 (2021/22), n=883 (2022/23)), Time (n=881). 'Neutral', 'Not a barrier' and 'Don't know' responses not shown. * Code added in 2022/23.*

Businesses were asked whether using Export Academy (and therefore DBT services) had helped them to **overcome these barriers** to exporting. Overall, most businesses reported that using the Export Academy service had helped them to overcome at least one barrier (73%), in particular around knowledge of support available from DBT and elsewhere (60%), knowledge of the exporting process (57%) and knowledge of export opportunities available (56%). Almost half said using the Export Academy service had helped them understand how to assess their capacity or readiness to export (45%), although this was lower than in the previous year (53% in 2021/22).

Chart 3.7.6 Barriers to exporting and how DBT helped – Export Academy



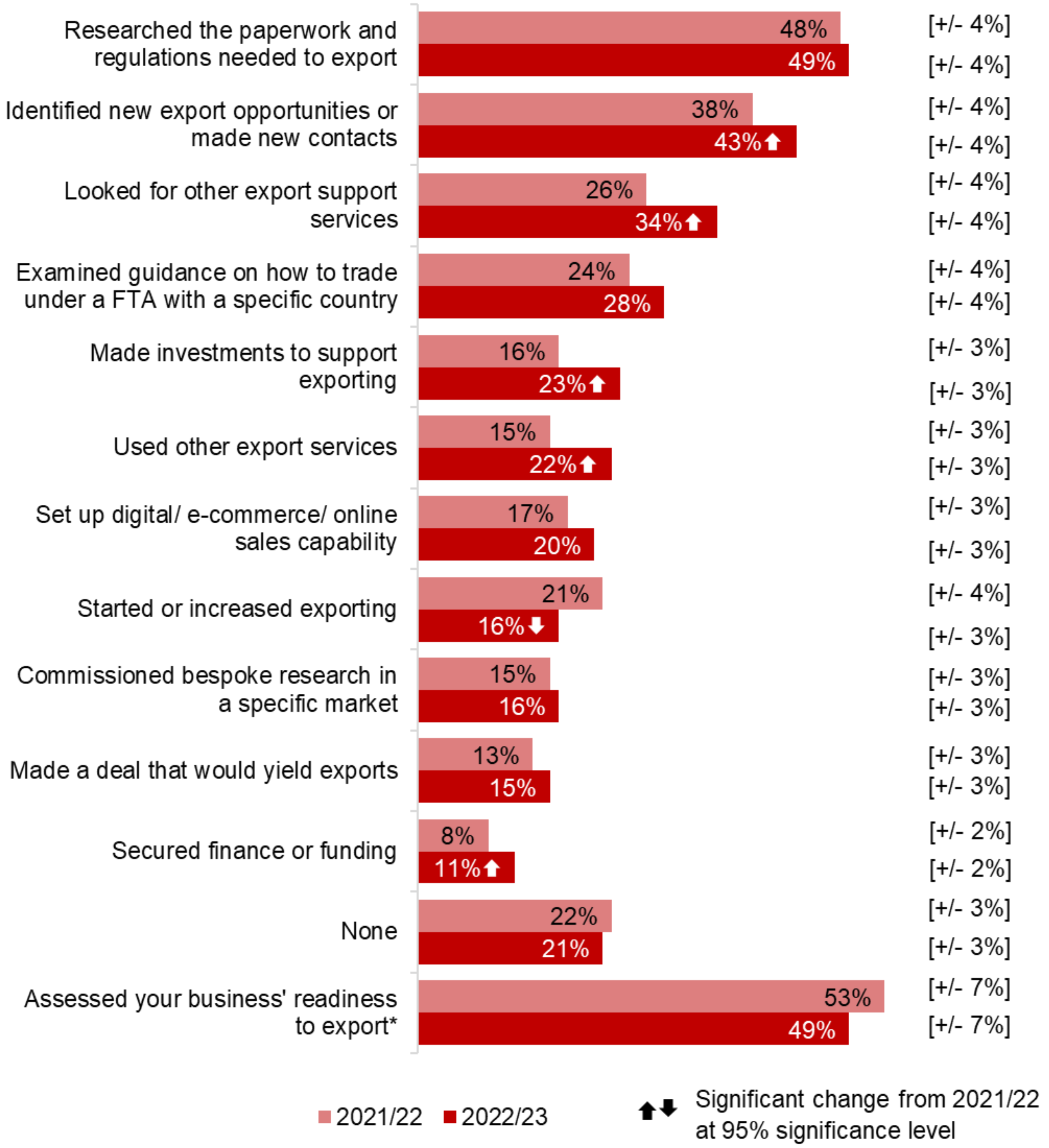
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=644 (2021/22), n=893 (2022/23)), Lack of knowledge (n=639 (2021/22), n=892 (2022/23)), Capacity to export (n=634 (2021/22), n=883 (2022/23)).
Qknowchange – Using the same scale as before, thinking about your experience of the service, to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks / understand how to assess capacity and readiness to export? Base: All businesses who used the service (n=654 (2021/22), n=914 (2022/23)).

3.7.2.2 Taking action

Businesses had taken a range of actions as a result of using Export Academy. Around half of businesses (49%) who were not exporting at the time of using the service had assessed the business' readiness to export.

Among all businesses, half said they had researched the paperwork and regulations needed to export (49%), and around two in five had identified new export opportunities or made new contacts (43%).

Chart 3.7.7 Actions taken as a result of service interaction – Export Academy



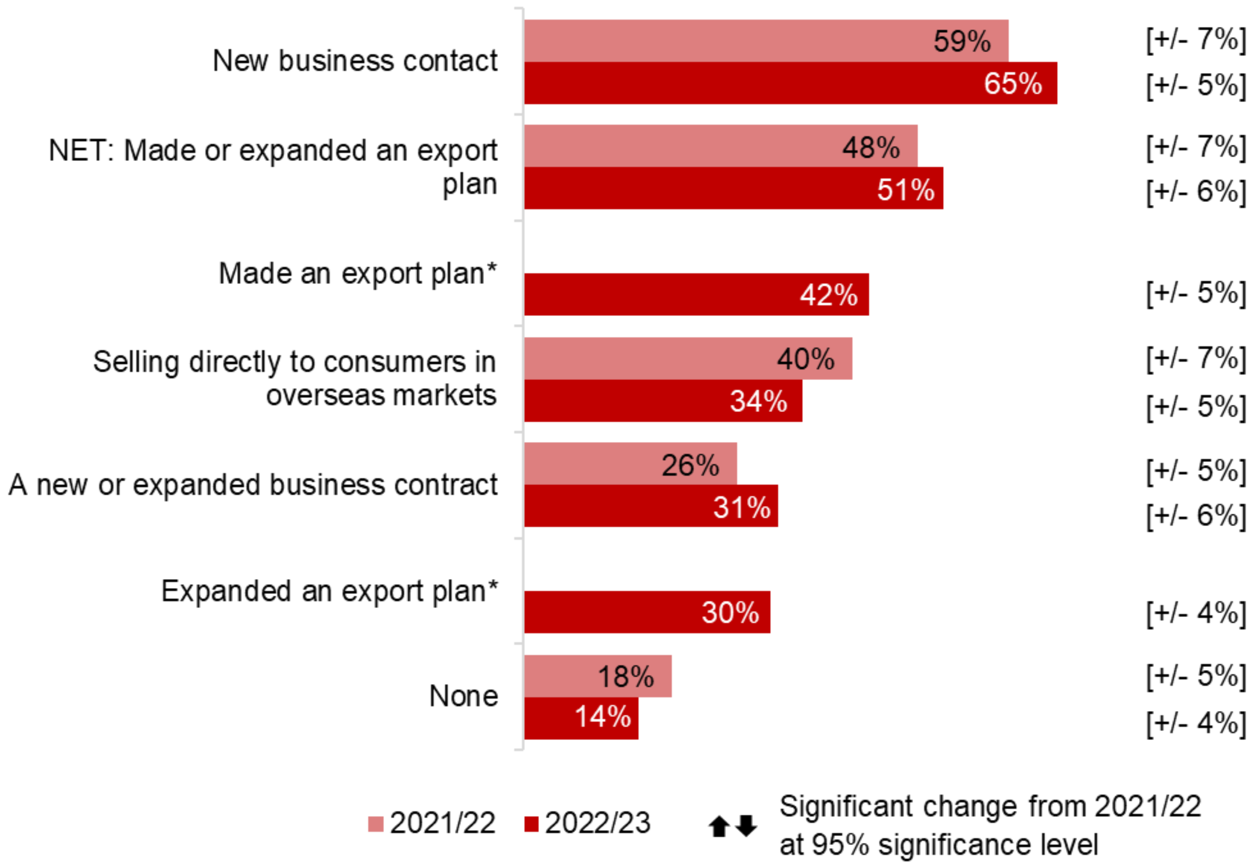
*Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n=654 (2021/22), n=914 (2022/23)); Non-exporters (n=151 (2021/22), n=206 (2022/23)). Only prompted codes are shown. * Asked to non-exporters only.*

Compared to the previous year, businesses using Export Academy were more likely to have taken some actions as a result of using the service. In particular, there were increases in the proportion of businesses who had identified new export opportunities or made new contacts (43%, up from 38% in 2021/22), looked for other export support services (34%, up from 26%), made investments to support exporting (23%, up from 16%), used other export services (22%, up from 15%), and secured finance or funding (11%, up from 8%). However, businesses using Export Academy were less likely to have started or increased exporting (16%, down from 21% in 2021/22).

3.7.2.3 Identifying new opportunities

As a result of using Export Academy, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (65%), followed by making or expanding an export plan (51%). Overall, 14% had not identified any opportunities. These results were in line with the previous year.

Chart 3.7.8 Opportunities identified as a result of service interaction – Export Academy

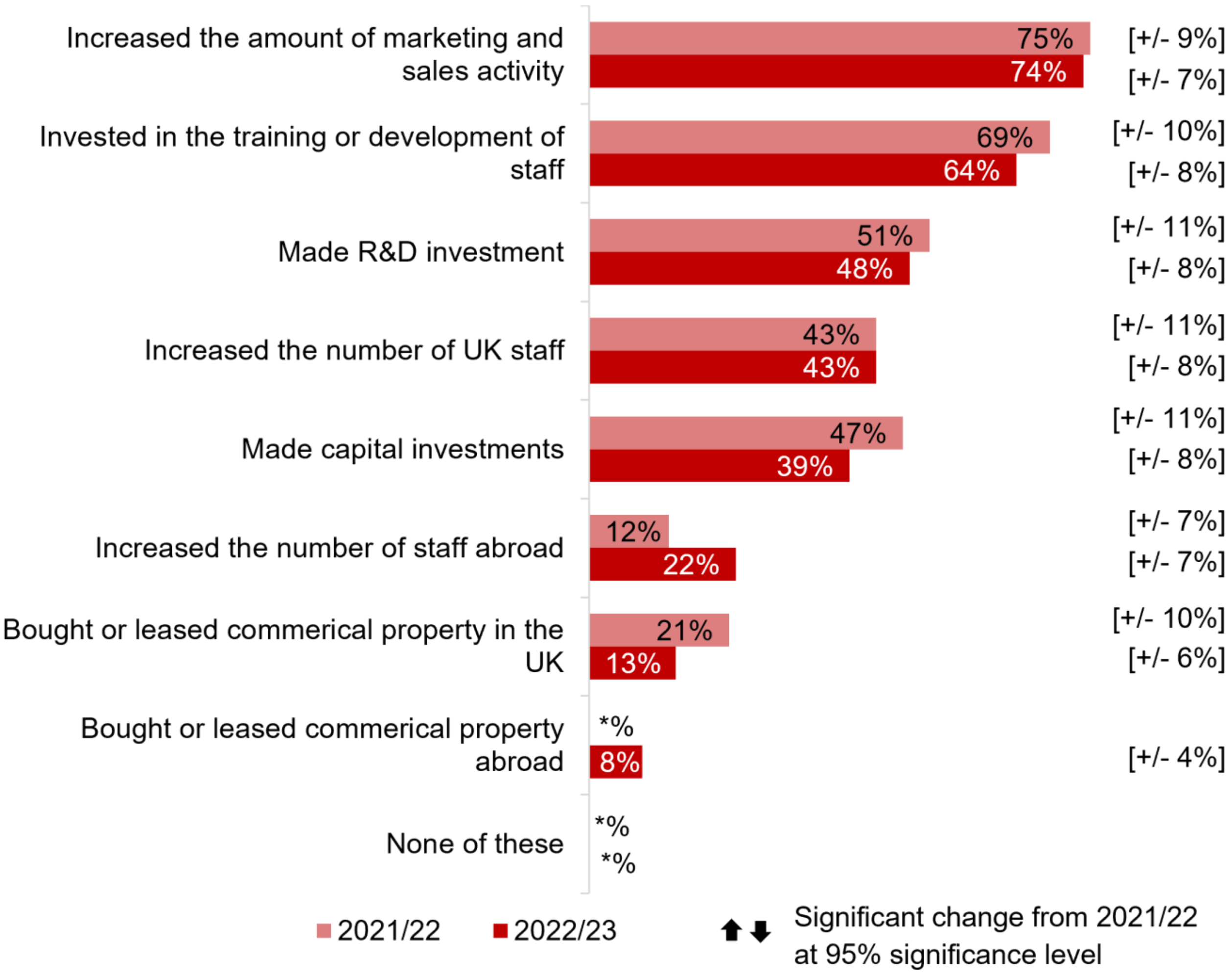


*Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All businesses who used the service who had identified a new business contact as part of the DBT service (n=278 (2021/22), n=426 (2022/23)). Only prompted codes are shown. * Codes split out in 2022/23.*

3.7.2.4 Making investments

Using the Export Academy service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the Export Academy service, three-quarters (74%) said they had increased their marketing and sales activity, while almost two-thirds (64%) had invested in the training or development of staff. This was followed by investment in R&D (48%), investment in increasing the number of UK staff (43%) and capital investments (39%). These results were in line with the previous year.

Chart 3.7.9 Type of investments made as a result of DBT service – Export Academy



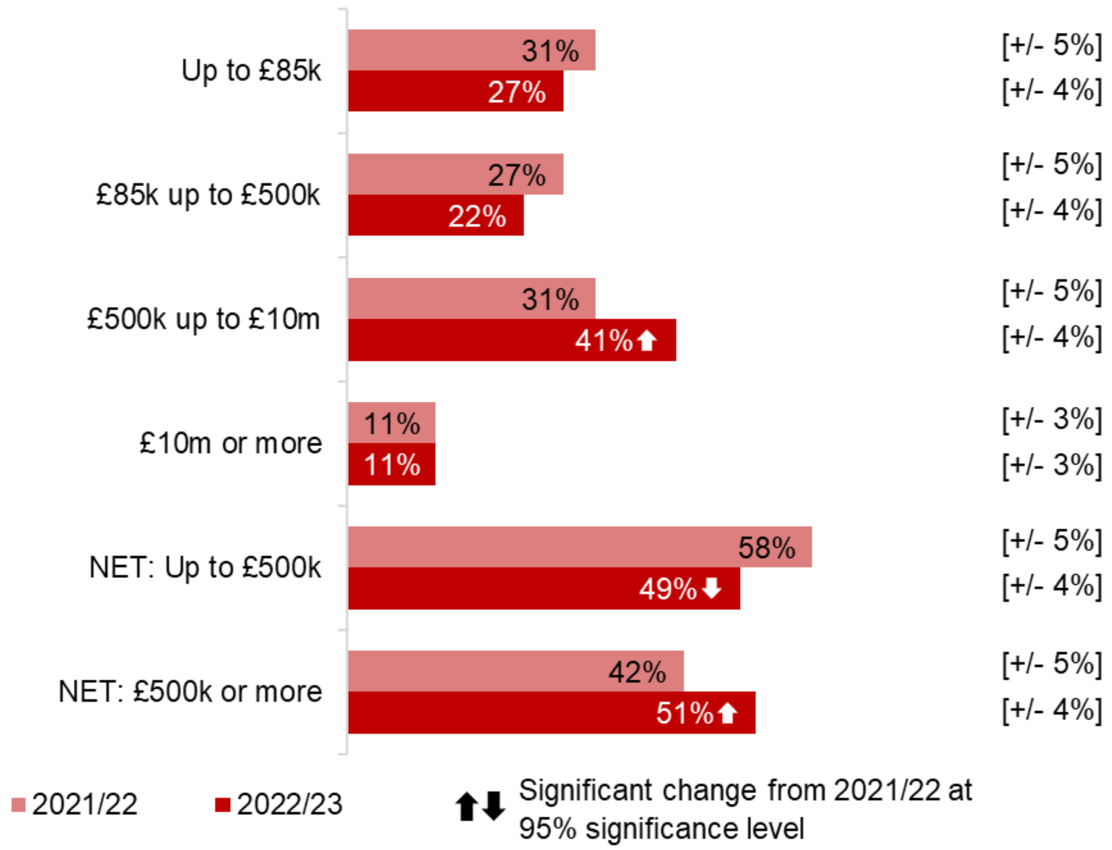
*Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Base: All businesses who had used the service and had made investments to support exporting (n=104 (2021/22), n=189 (2022/23)). Only prompted codes are shown. *Redacted*

3.7.3 Service use by firmographics and export behaviour

Export Academy use was evenly split between businesses with high turnovers of £500,000 or more (51%, up from 42% in 2021/22) and those with lower turnovers (49%, down from 58%). This was driven by an increase in the proportion of businesses with turnovers or £500,000 up to £10 million.

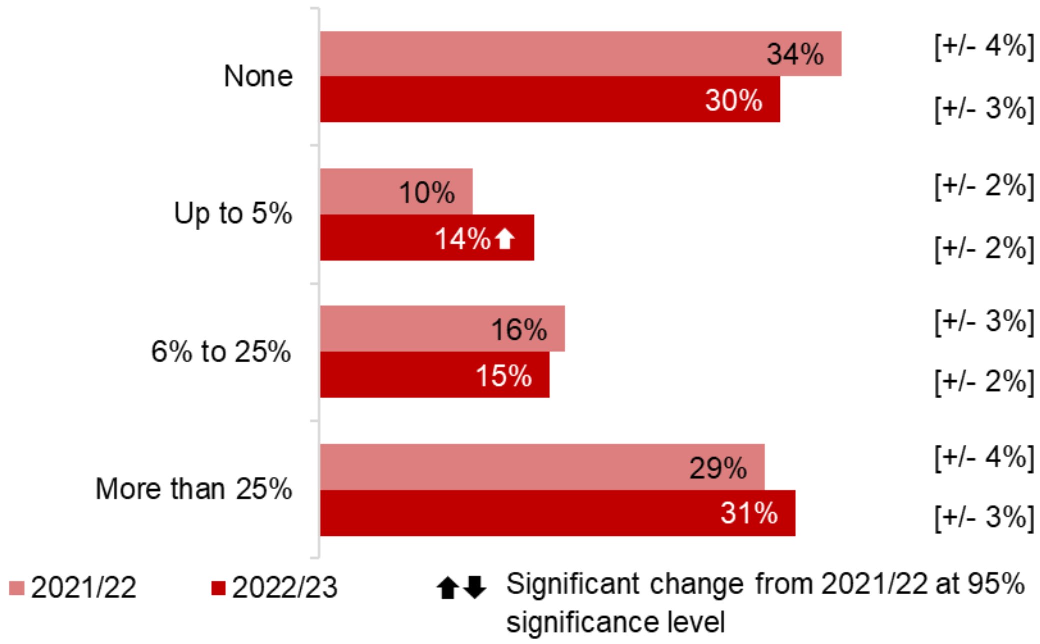
Three in ten firms (31%) reported that more than a quarter of their turnover came from exporting, with a similar proportion (30%) reporting that none of it did. Compared to the previous year, there was an increase in the proportion of businesses where up to 5% of their turnover came from exports.

Chart 3.7.10 Turnover – Export Academy



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational businesses)? Base: All businesses who used the service (excluding Don't know/Refused) (n=407 (2021/22), n=563 (2022/23)).

Chart 3.7.11 Proportion of turnover from exporting – Export Academy

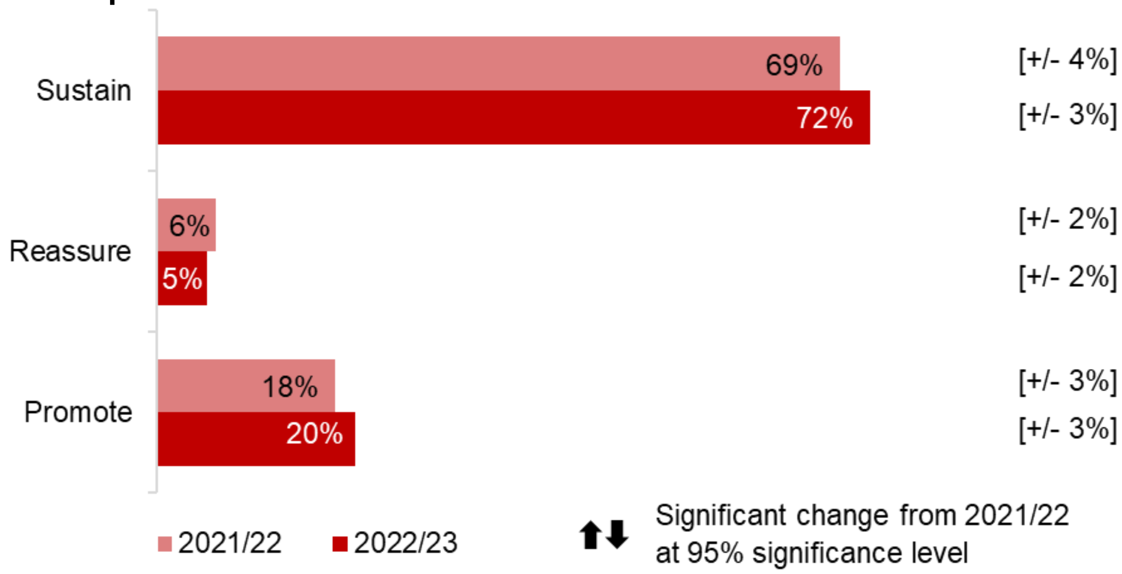


Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n=654 (2021/22), n=914 (2022/23))). 'Don't know' and 'Refused' responses not shown

Current exporters made up the majority of businesses using the Export Academy service. Seven in ten businesses (72%) were currently exporting (classified as 'Sustain'). A fifth of respondents (20%) had never exported before (classified as 'Promote'), and 5% had exported before but not in the past 12 months (classified as 'Reassure').[42] This was in line with the previous year.

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

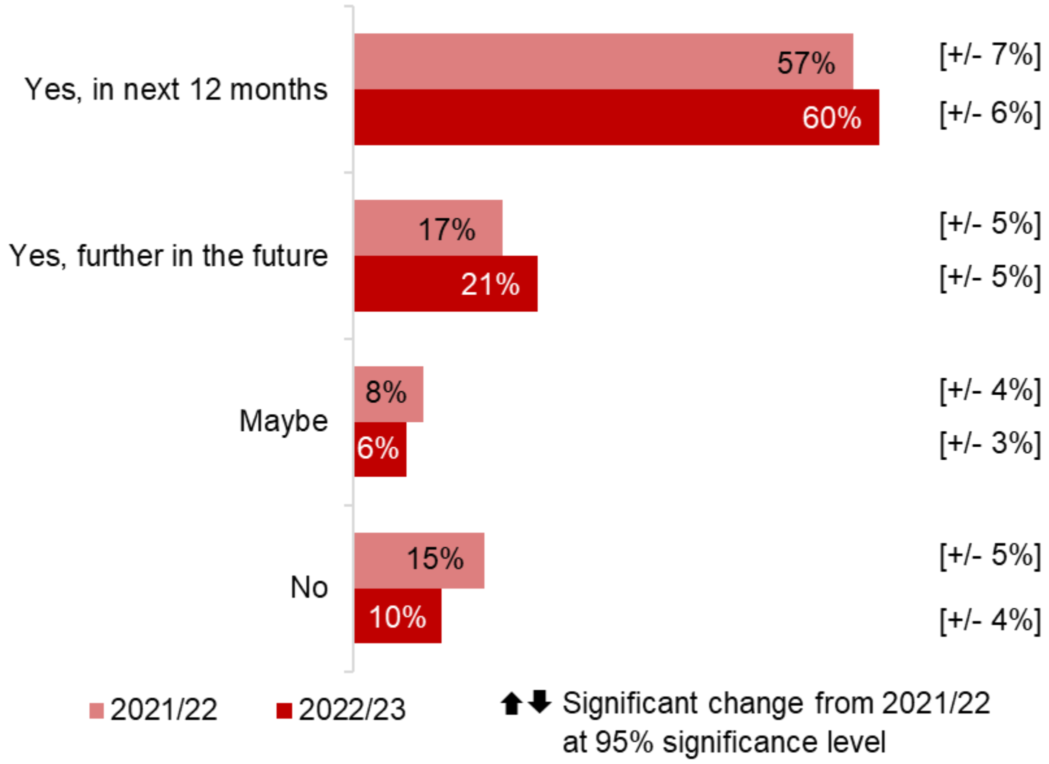
Chart 3.7.12 Exporter status



Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n=654 (2021/22), n=914 (2022/23)).

Most former exporters using Export Academy had plans to export again. Six in ten (60%) of those that were not currently exporting (but had done so previously), reported planning to export in the next 12 months. This was in line with the previous year.

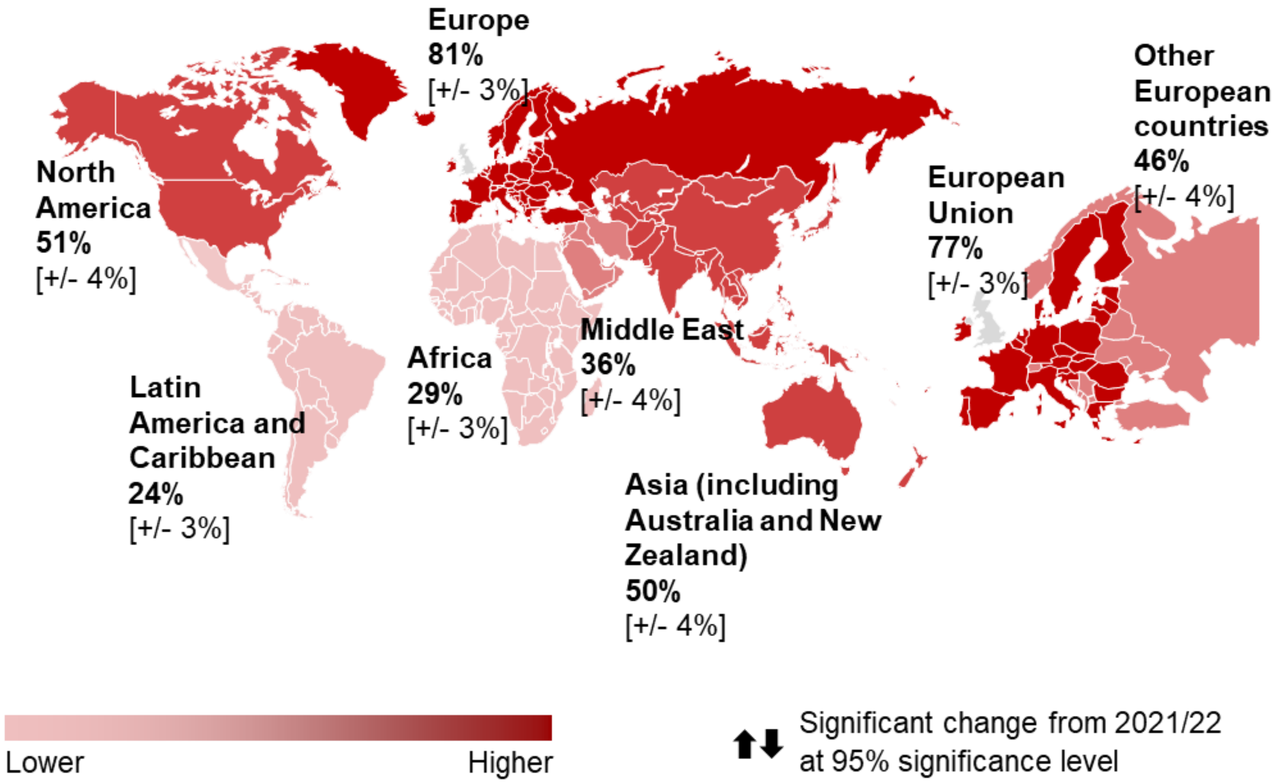
Chart 3.7.13 Non-exporter plans to sell overseas



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All businesses who used the service and who are not currently exporting but have previously sold goods or services overseas (n=215 (2021/22), n=265 (2022/23)).

Among Export Academy users who were currently exporting or had done so previously, Europe was the most common export market, with four in five exporting to the region (81%). Europe as an export market was further divided into the European Union (to which 77% exported) and other European countries (to which 46% exported). This was followed by North America (51%), Asia (50%), the Middle East (36%), Africa (29%) and Latin America and the Caribbean (24%). These findings were in line with the previous year.

Chart 3.7.14 Regions organisations export to or exported to previously – Export Academy



Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n=495 (2021/22), n=705 (2022/23)).

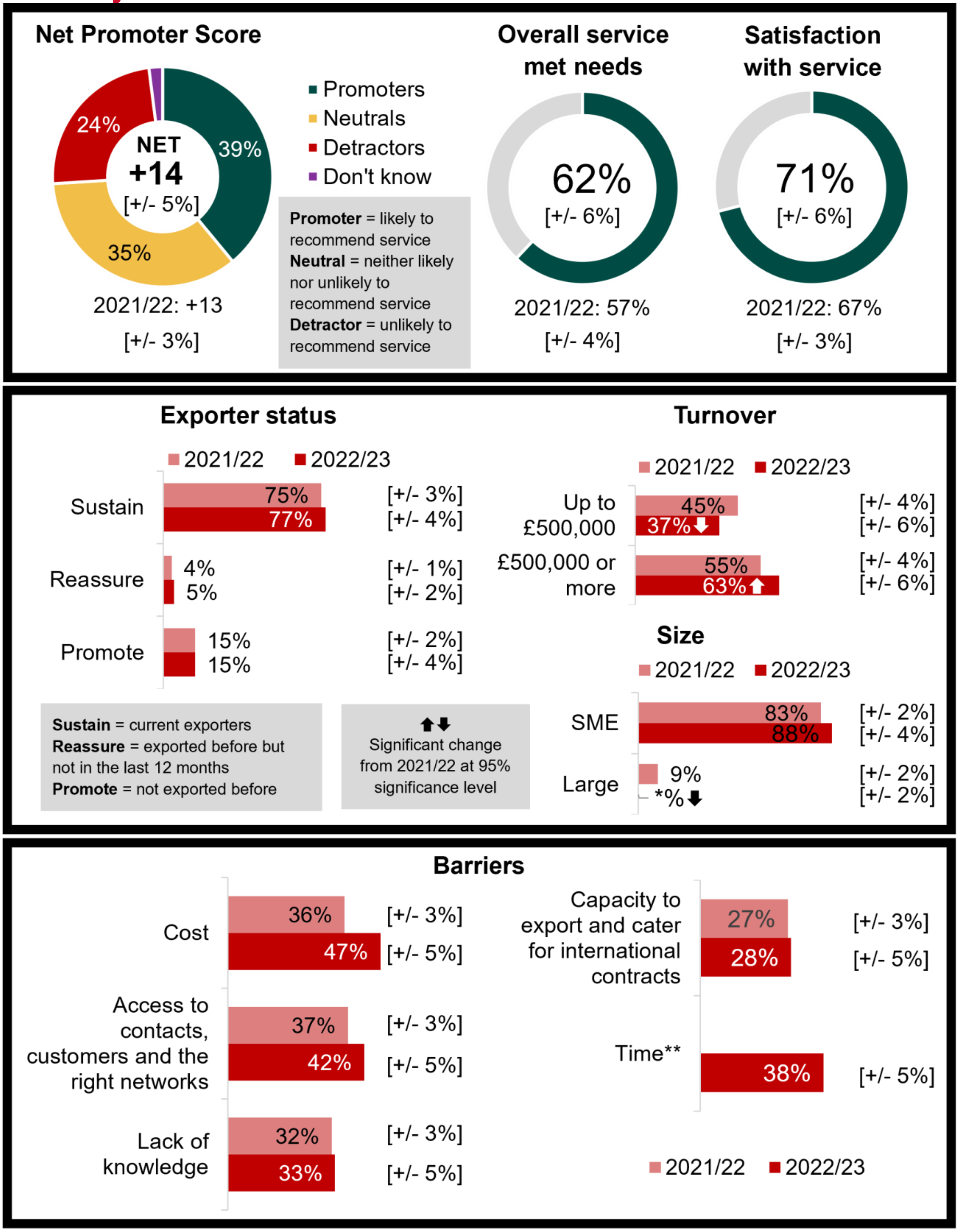
Table 3.7.1 Regions organisations export to or exported to previously – Export Academy

Region	% (21/22)	CI (+/-) (21/22)	% (22/23)	CI (+/-) (22/23)	Change
Europe	84%	4%	81%	3%	-
European Union	80%	4%	77%	3%	-
Other European countries	52%	5%	46%	4%	-
Asia (including Australia and New Zealand)	60%	5%	50%	4%	-
North America	56%	5%	51%	4%	-
Middle East	48%	5%	36%	4%	-
Africa	35%	4%	29%	3%	-
Latin America and the Caribbean	26%	4%	24%	3%	-

↑↓ Significant change from 2021/22 at 95% significance level

Qcurexp – Do you currently or did you export to any of the following regions? Base: All respondents who used the service and who have exported (n=495 (2021/22), n=705 (2022/23)).

Summary: Webinars



*Base: All businesses who used the service (n=1,155 (2021/22), n=362 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=1,120 (2021/22), n=355 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=1,147 (2021/22), n=357 (2022/23)); Exporter status (n=1,155 (2021/22), n=362 (2022/23)); Turnover - All businesses who used the service (excluding Don't know/Refused) (n=770 (2021/22), n=244 (2022/23)); Size - All businesses who used the service (n=1,155 (2021/22), n=362 (2022/23)); Barriers - All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=1,113 (2021/22), n=357 (2022/23)), Cost (n=1,108 (2021/22), n=351 (2022/23), Lack of knowledge (n=1,115 (2021/22), n=355 (2022/23)), Capacity to export (n=1,096 (2021/22), n=352 (2022/23)), Time** (n=348). ** Code added in 2022/23. *Redacted*

3.8 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.

This chapter explores satisfaction with the Webinars service, actions taken as a result of using the service, and the exporting profile of businesses. The findings are based on interviews with 362 businesses that used Webinars between April 2022 and March 2023.

Key changes since 2021/22:

Attitudes to the advice and support provided by the Webinars service were mostly in line with the previous year.

Users were more likely to report cost as a barrier to exporting than in the previous year (47% compared to 36% in 2021/22). When asked whether using Webinars had helped them to overcome barriers to exporting, businesses were more likely to report that using Webinars had helped them understand how to increase their knowledge of the exporting opportunities that were available (60% compared to 52% in 2021/22).

As a result of using this service, more businesses said they had secured finance or funding (13% compared to 7% in 2021/22). However, businesses were less likely to have made R&D investment this year (51% compared to 66% in 2021/22) or to have increased the number of staff abroad (14% compared to 32% in 2021/22).

Compared to the previous year, there were more users with a higher turnover of £500,000 or more (63% compared to 55% in 2021/22) and fewer with a turnover of less than £500,000 (37% compared to 45% in 2021/22).

More non-exporting users had plans to start selling overseas in the next 12 months (70% compared to 56% in 2021/22), while fewer than one in ten (7%) had no plans to export (compared to 19% in 2021/22).

3.8.1 Satisfaction with the Webinars service

3.8.1.1 Service performance

Businesses gave a mixed response as to whether they would recommend the Webinars service to colleagues and business associates. Around two in five users (39%) were 'Promoters', i.e. likely to recommend the service, and a quarter (24%) were 'Detractors', i.e. unlikely to recommend the service.[43] These ratings were in line with the previous year.

The Net Promoter Score ('Promoters' minus 'Detractors') was +14, in line with the previous year (+13 in 2021/22). The Net Promoter Score was higher among businesses with a turnover of £500,000 or more (+16), compared to those with a turnover of up to £500,000 (+2).

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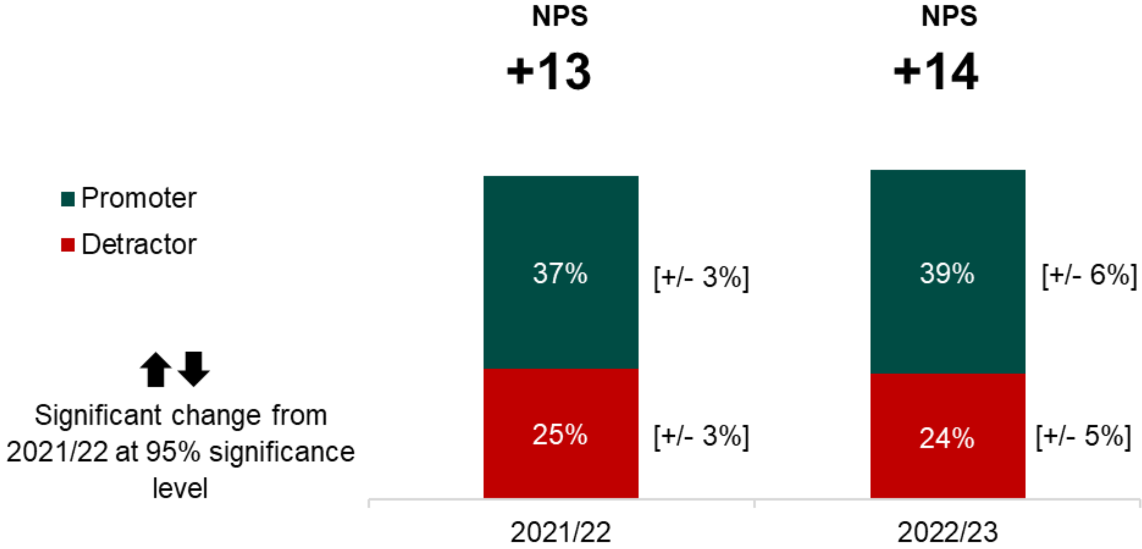
[43] Respondents answered on a scale of 0 (not at all likely) to 10 (extremely likely). Promoter = 9-10; Neutral = 7-8; Detractor = 0-6.

Chart 3.8.1 Likelihood of recommending service (NPS) – Webinars



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 who used the service (n=1,155 (2021/22), n=362 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

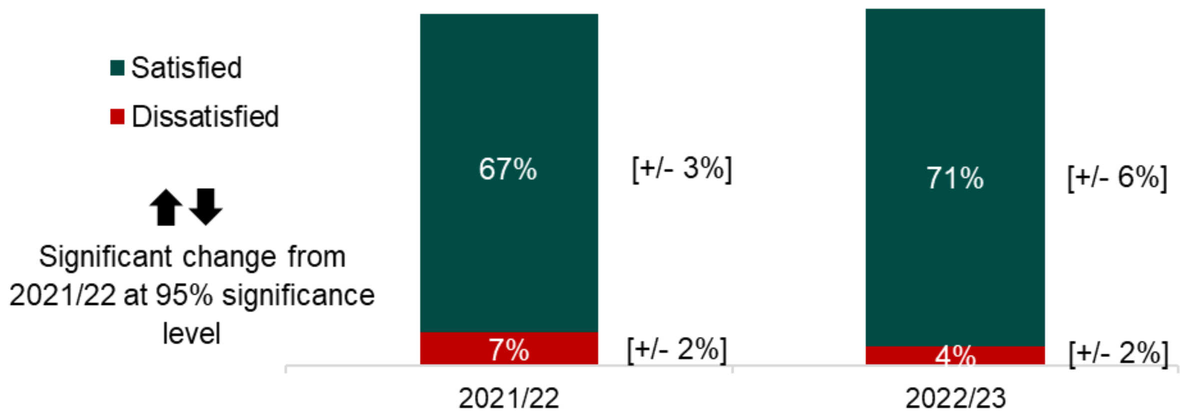
When asked about **suggestions to improve the service**, around a quarter of respondents said that better support (27%) would improve the Webinars service, while a similar proportion asked for better communication (24%). Specifically, the most frequently suggested improvement for the service was introducing more sector or industry-specific services (23%), followed by more communication or information (13%), better follow-up (11%) and better-quality information (10%).

3.8.1.2 Satisfaction

Satisfaction with Webinars stayed consistent with the previous year. Seven in ten respondents (71%) said they were satisfied with their experience (in line with 67% in 2021/22), and 4% said they were dissatisfied (in line with 7% in 2021/22).[44]

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

Chart 3.8.2 Satisfaction with service - Webinars



Qsatis – Using the same scale as before, thinking about your overall experience of the service, how satisfied were you with this service? Base: All businesses who used the service (excluding 'not applicable' responses) (n=1,147 (2021/22), n=357 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

Of the 13 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reasons for dissatisfaction**[45] were feeling they did not get enough information or advice (eight respondents), that the service did not meet their expectations (five respondents) and that the advice was more relevant to different types of businesses (five respondents).

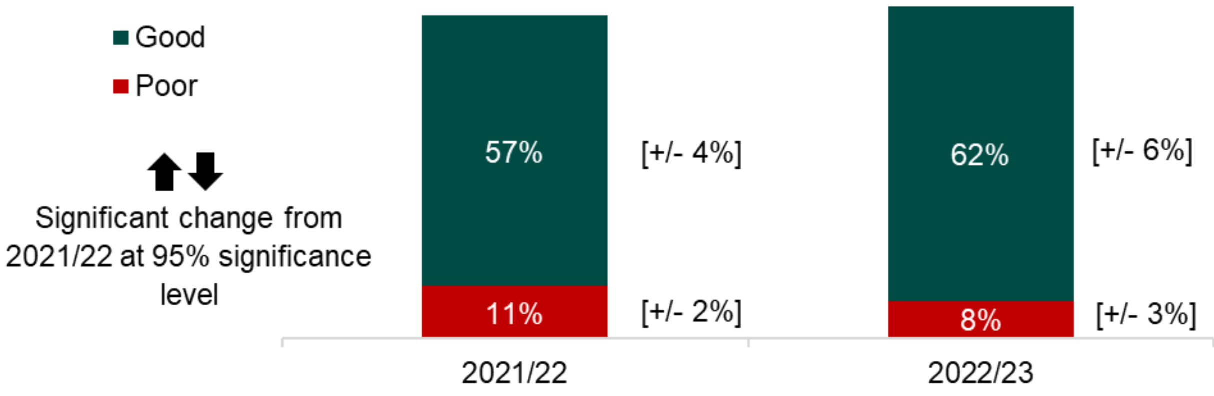
3.8.1.3 Whether overall service met needs

The majority of businesses were positive that the Webinars service had met their needs; more than six in ten (62%) rated it as good, and fewer than one in ten (8%) rated it as poor.[46] These findings were in line with the previous year.

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

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

Chart 3.8.3 Rating of whether overall service met needs – Webinars



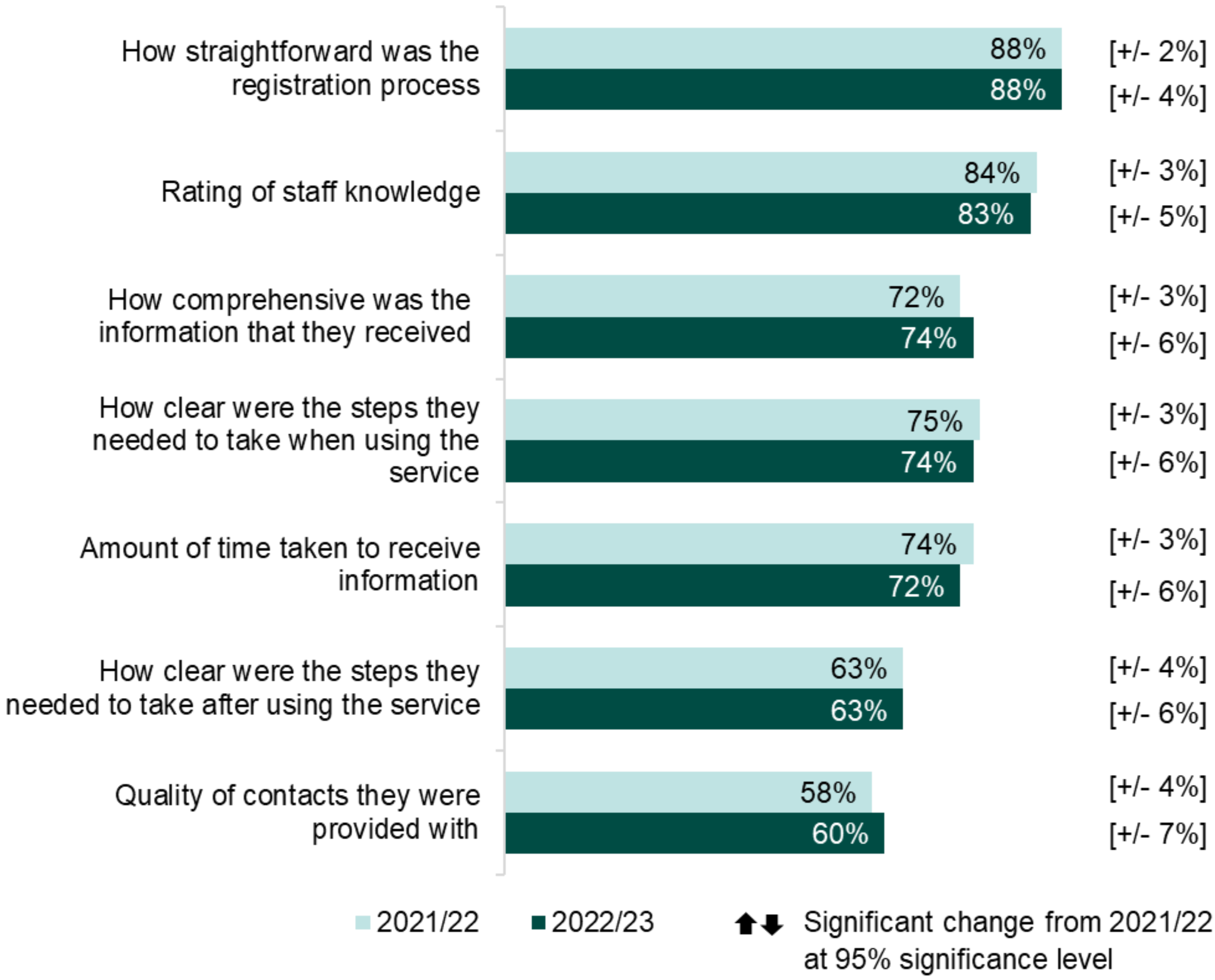
Qualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All businesses who used the service (excluding 'not applicable' responses) (n=1,120 (2021/22), n=355 (2022/23)). 'Neutral' and 'Don't know' responses not shown.

Businesses were most positive about how straightforward the Webinars registration process was (88%) and staff knowledge (83%). Around three-quarters were positive about how comprehensive the information they received was (74%), how clear they were on the steps that they needed to take when using the service (74%) and the amount of time taken to receive information (72%). They were least positive about the clarity of the steps they needed to take after using the service (63%) and the quality of contacts they were provided with (60%).[47] Findings were in line with the previous year.

Businesses with a turnover of £500,000 or more were more likely to be positive about how clear they were on the steps they needed to take when using the service (80% compared to 66% of those with a turnover of up to £500,000).

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

Chart 3.8.4 Rating by business of the specific advice and support they received – Webinars



Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=1,079 (2021/22), n=349 (2022/23)). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=1,012 (2021/22), n=321 (2022/23)). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=1,112 (2021/22), n=351 (2022/23)). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from the service? (n=1,134 (2021/22), n=355 (2022/23)). Qclarity_2 – The service made clear what I should do next after using it (n=1,098 (2021/22), n=350 (2022/23)). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through the service? (n=868 (2021/22), n=278 (2022/23)). Qreg – How straightforward was the registration process for the service? (n=1,122 (2021/22), n=351 (2022/23)). Base: All businesses who used the service (excluding 'not applicable' responses). 'Negative', 'Neutral' and 'Don't know' responses not shown.

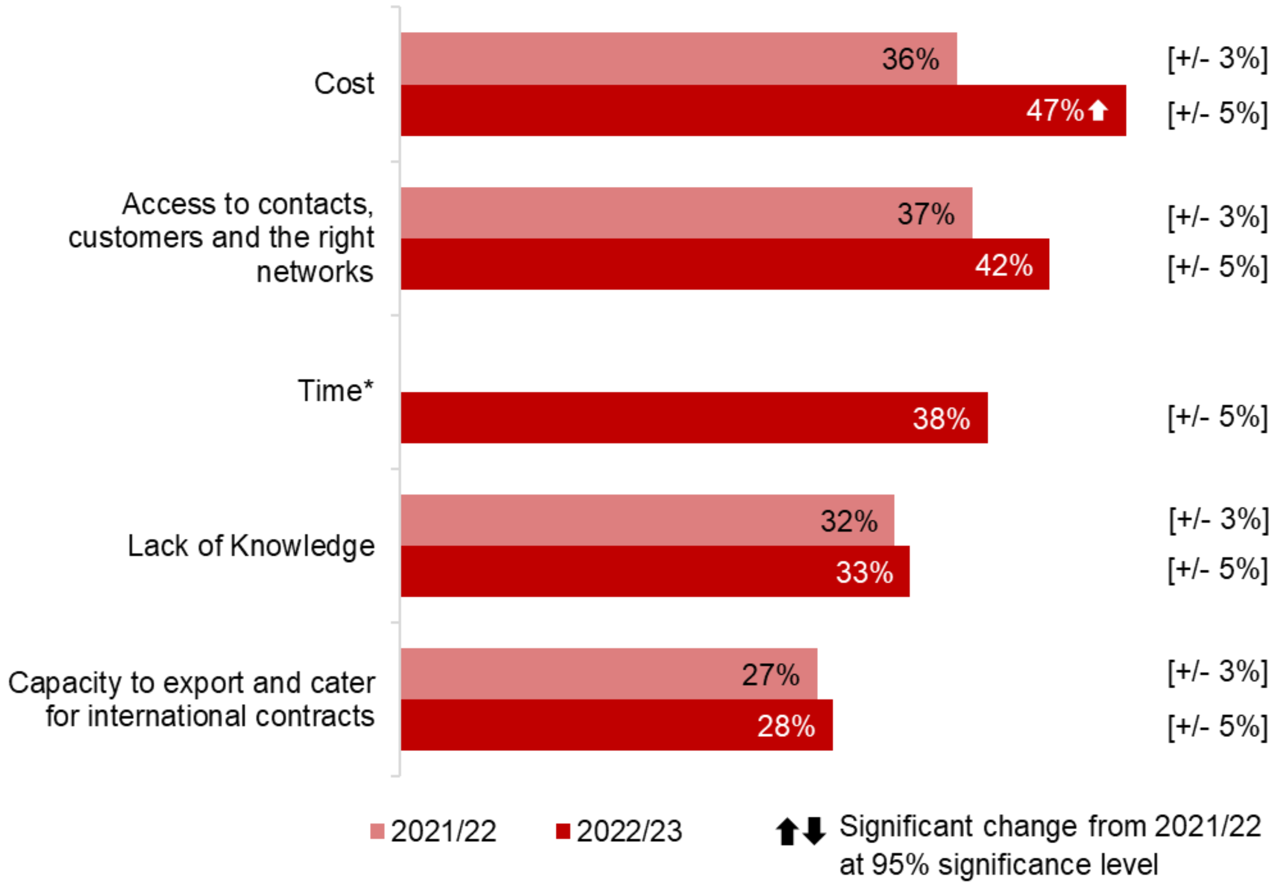
3.8.2 Outcomes of using the Webinars service

3.8.2.1 Counteracting the barriers to exporting

Businesses that used the Webinars service reported facing barriers to exporting. Almost half (47%) said that cost was a barrier, while around two in five (42%) said that access to networks was a barrier and a similar proportion (38%) said that time was a barrier. A third (33%) perceived lack of knowledge as a barrier, while just over a quarter (28%) thought that their capacity to export was a barrier.

Respondents were more likely to say that cost was a barrier to exporting than in the previous year (47% compared with 36% in 2021/22).

Chart 3.8.5 Barriers to exporting – Webinars

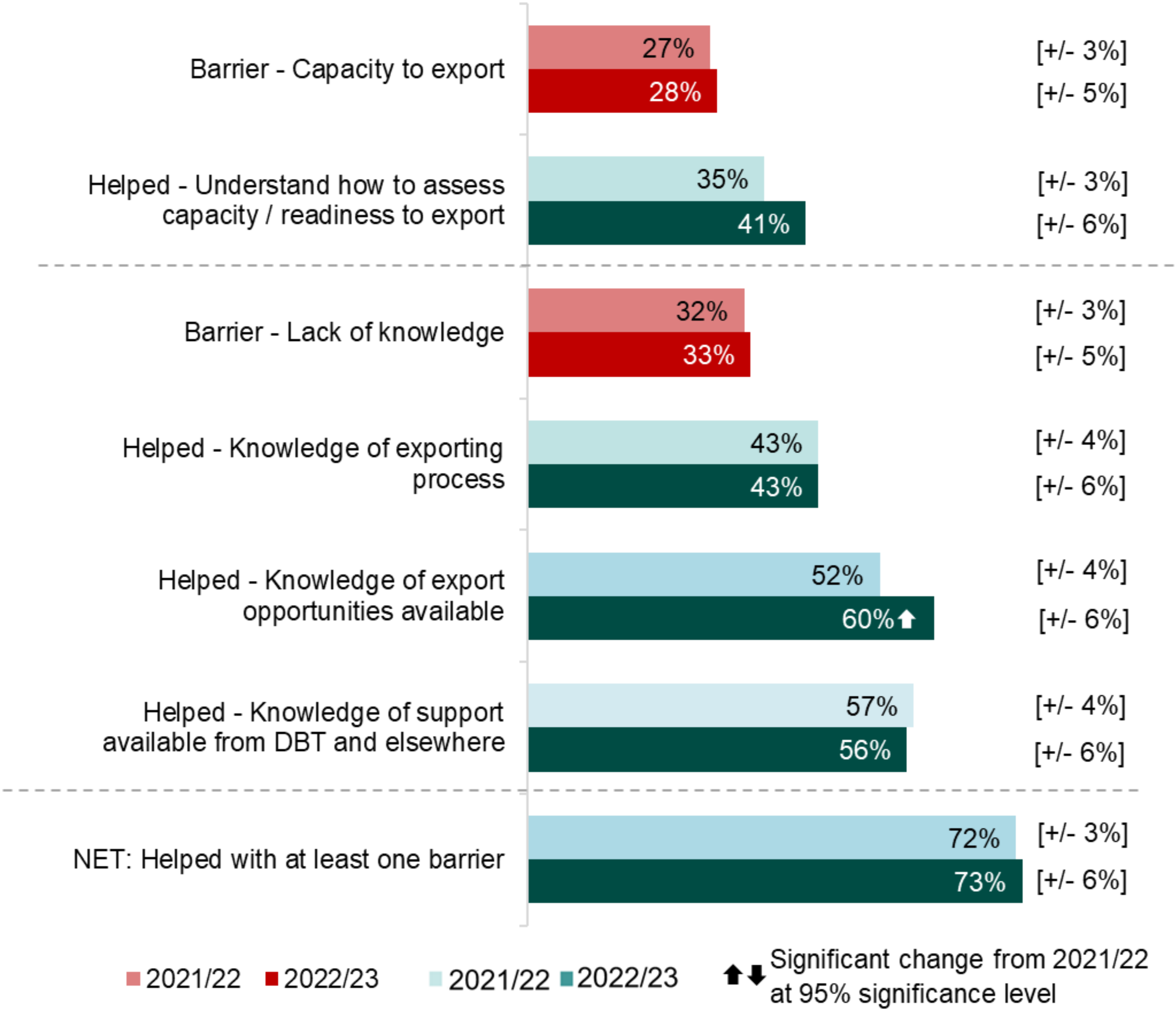


*Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=1,113 (2021/22), n=357 (2022/23)), Cost (n=1,108 (2021/22), n=351 (2022/23)), Lack of knowledge (n=1,115 (2021/22), n=355 (2022/23)), Capacity to export (n=1,096 (2021/22), n=352 (2022/23)), Time (n=348). 'Neutral', 'Not a barrier' and 'Don't know' responses not shown. * Code added in 2022/23.*

Businesses were asked whether using Webinars (and therefore DBT services) had helped them to **overcome these barriers** to exporting. Businesses reported that using Webinars had helped them understand how to increase their knowledge of the exporting opportunities that were available (60%, up from 52% in 2021/22).

Businesses also reported that using Webinars had helped to increase their knowledge of support available from DBT and elsewhere (56%), had helped to increase their knowledge of the exporting process (43%) and had helped them to understand how to assess their capacity and readiness to export (41%). These findings were in line with the previous year.

Chart 3.8.6 Barriers to exporting and how DBT helped – Webinars



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All businesses who used the service (excluding 'not applicable' responses): Access to contacts (n=1,113 (2021/22), n=357 (2022/23)), Lack of knowledge (n=1,115 (2021/22), n=355 (2022/23)), Capacity to export (n=1,096 (2021/22), n=352 (2022/23)).
Qknowchange – Using the same scale as before, thinking about your experience of the service, to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks / understand how to assess capacity and readiness to export? Base: All businesses who used the service (n=1,155 (2021/22), n=362 (2022/23)).

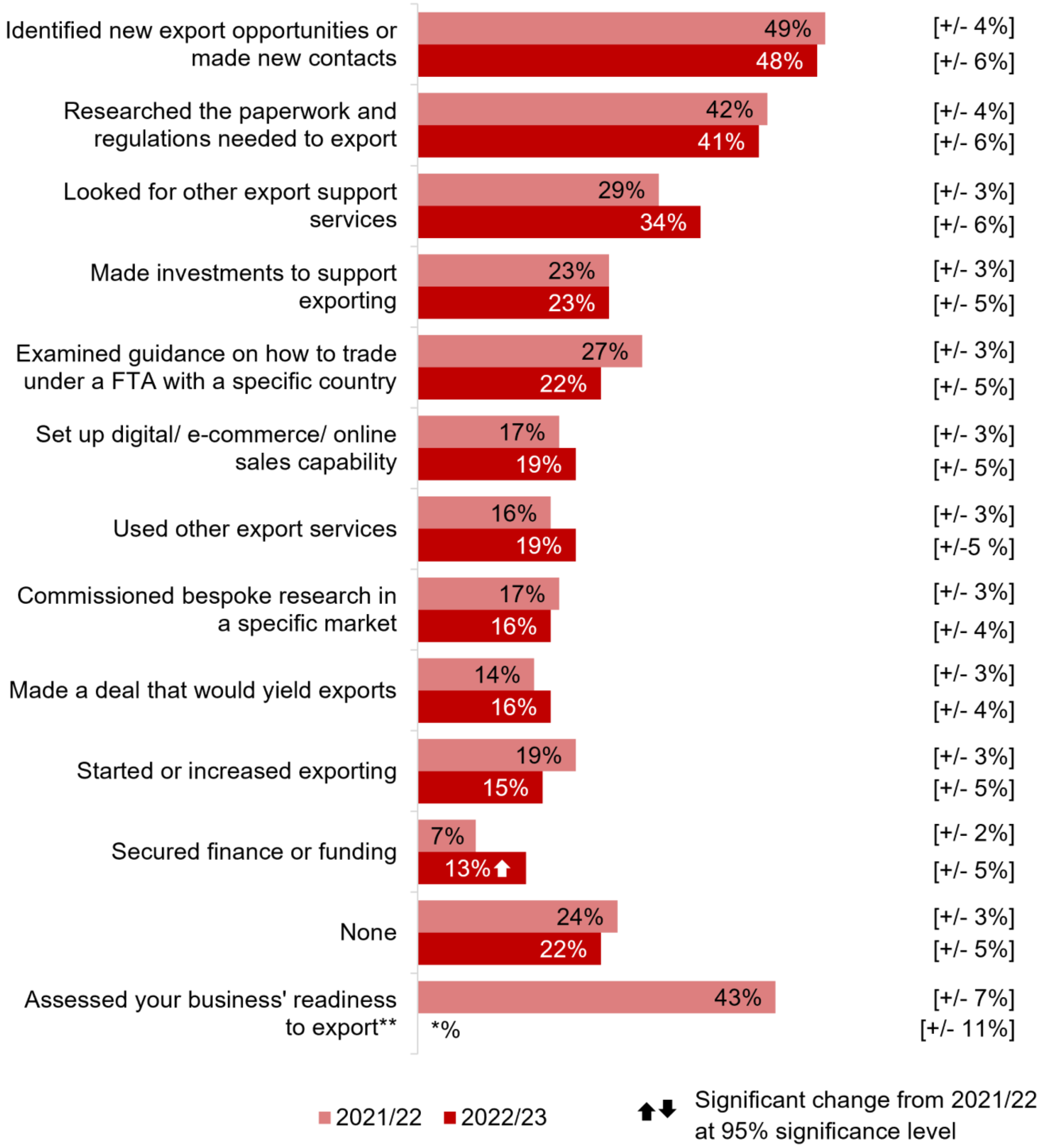
3.8.2.2 Taking action

Businesses had taken a range of actions as a result of using Webinars. Among all businesses, around half said they had identified new export opportunities or made new contacts (48%). Around two in five (41%) said they had researched the paperwork and regulations needed to export, while a third (34%) had looked for other export support services.

Businesses were more likely to have secured finance or funding than in the previous year (13% compared to 7% in 2021/22).

Businesses with a lower turnover (less than £500,000) were more likely to say they had set up digital or online sales capacity (35% compared to 16% of those with a turnover of £500,000 or more).

Chart 3.8.7 Actions taken as a result of service interaction – Webinars

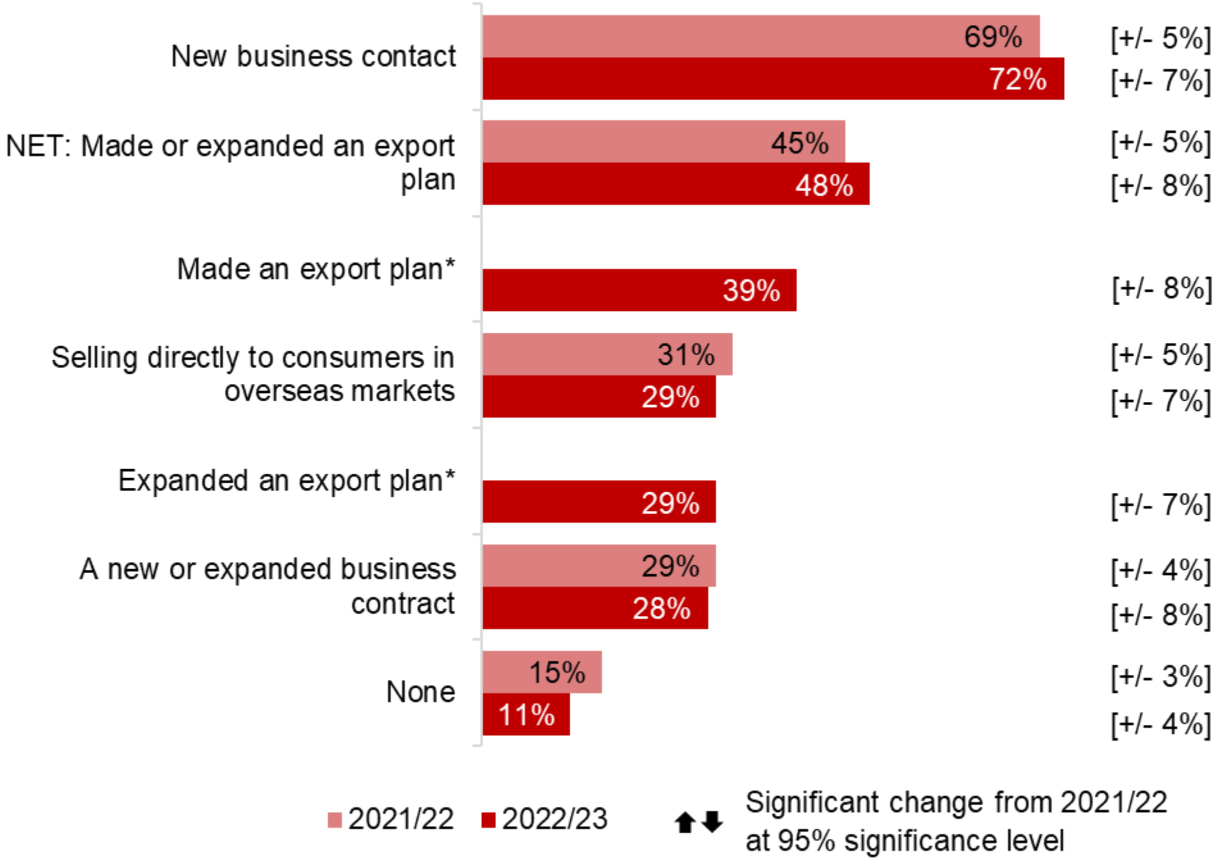


Qresult – What has your business done as a result of the service? Only answers given by more than 2% of businesses are shown. Base: All businesses who used the service (n=1,155 (2021/22), n=362 (2022/23)); Non-exporters (n=290 (2021/22), n= (2022/23)). Only prompted codes are shown. ** Asked to non-exporters only. *Redacted due to small base size*

3.8.2.3 Identifying new opportunities

As a result of using Webinars, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (72%), followed by making or expanding an export plan (48%), selling directly to consumers in overseas markets (29%) or making a new or expanded business contract (28%). These findings were in line with 2021/22.

Chart 3.8.8 Opportunities identified as a result of service interaction – Webinars



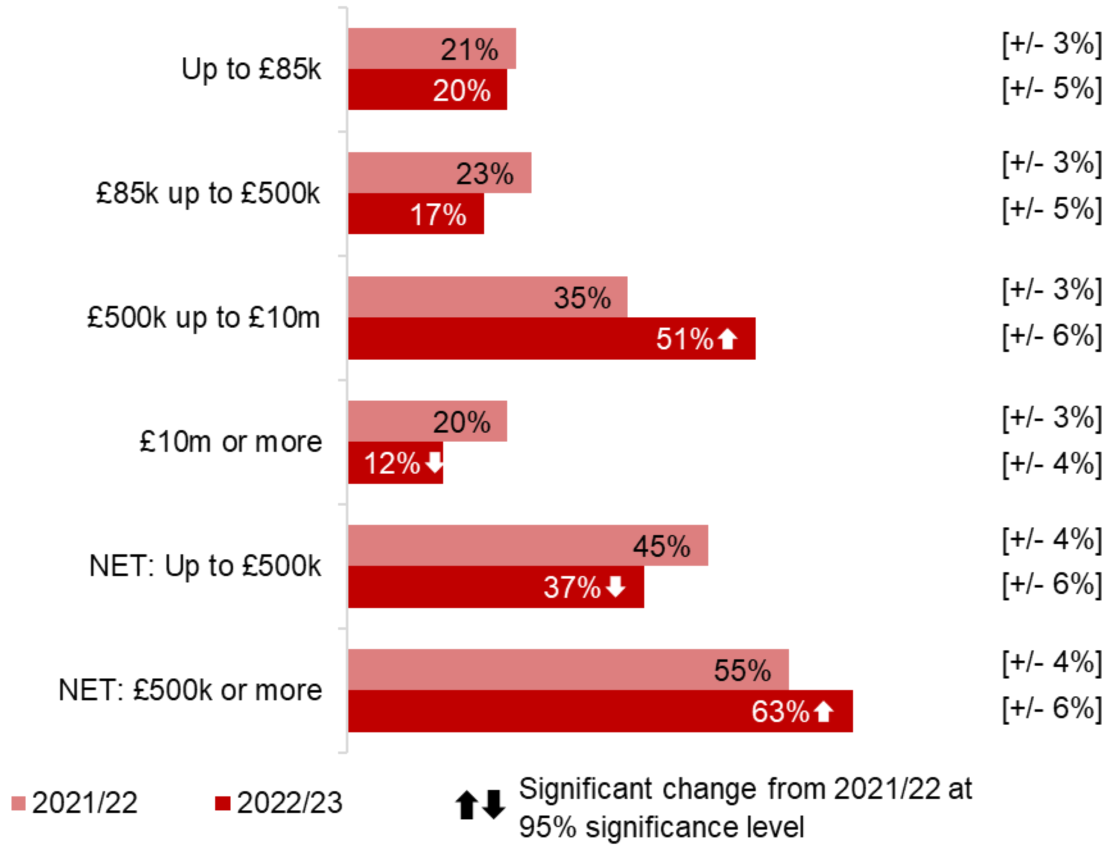
*Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All businesses who used the service who had identified a new business contact as part of the DBT service (n=612 (2021/22), n=212 (2022/23)). Only prompted codes are shown. * Codes split out in 2022/23.*

3.8.3 Service use by firmographics and export behaviour

The majority of Webinars users were businesses with high turnovers of £500,000 or more (63%). Compared to the previous year, there were more businesses with a higher turnover of £500,000 or more (63% compared to 55% in 2021/22) and fewer with a turnover of less than £500,000 (37% compared to 45% in 2021/22).

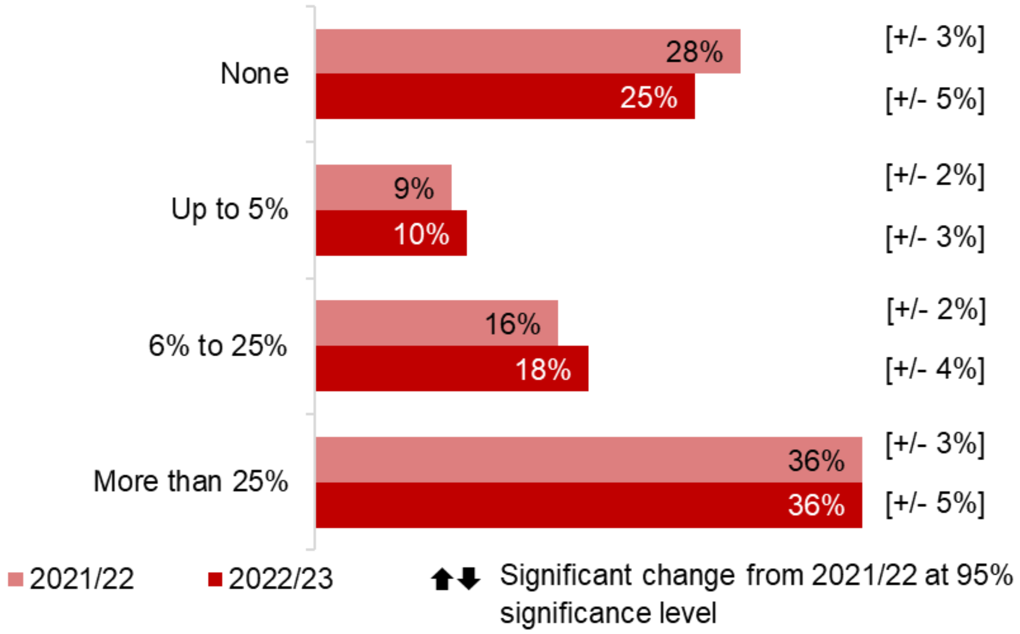
Just over a third of firms (36%) reported that more than a quarter of their turnover came from exporting. A quarter (25%) said that said none of their turnover was accounted for by exports. These findings were in line with the previous year.

Chart 3.8.9 Turnover – Webinars



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational businesses)? Base: All businesses who used the service (excluding Don't know/Refused) (n=770 (2021/22), n=244 (2022/23)).

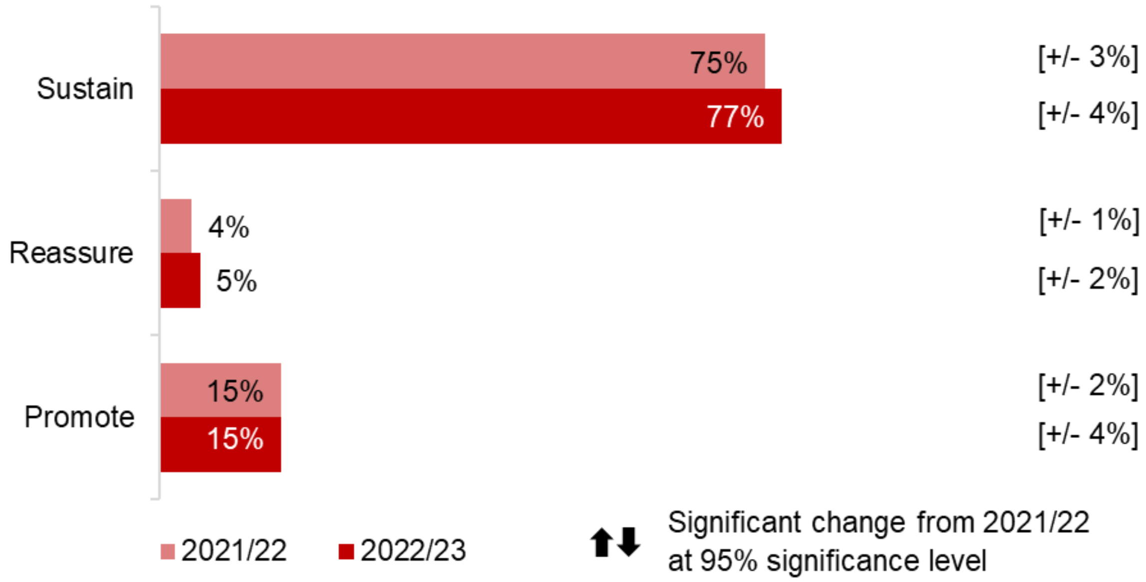
Chart 3.8.10 Proportion of turnover from exporting – Webinars



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All businesses who used the service (n=1,155 (2021/22), n=362 (2022/23)). 'Don't know' and 'Refused' responses not shown

Current exporters made up the majority of businesses using the Webinars service. Around three quarters of businesses (77%) were currently exporting ('Sustain'). In addition, 15% had never exported before ('Promote'), while 5% had exported before but not in the past 12 months ('Reassure'). These findings were in line with the previous year.[48]

Chart 3.8.11 Exporter status – Webinars



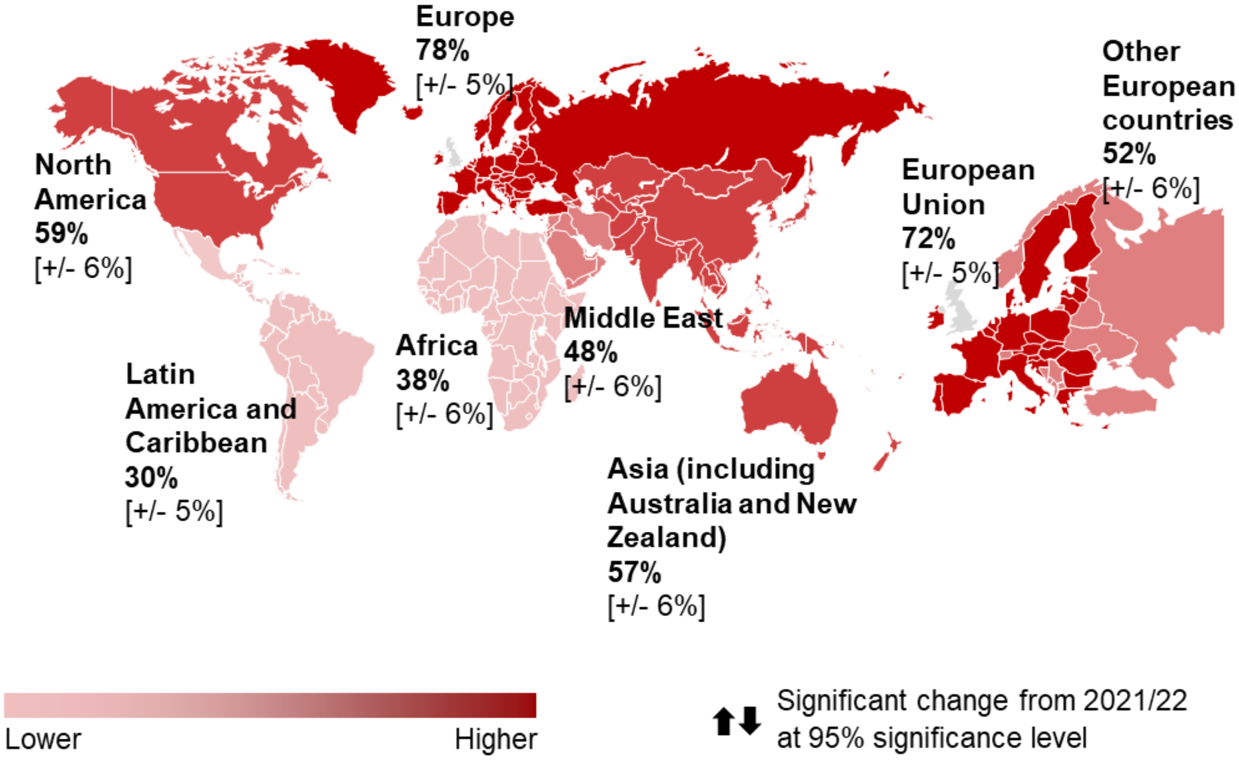
Qexportstatus – At the time of your dealing with the service, was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? Base: All businesses who used the service (n=1,155 (2021/22), n=362 (2022/23)).

Europe remained the most common export market among Webinars businesses. Among those that were currently exporting or had done so previously, over three-quarters (78%) exported to Europe, including 72% exporting to the European Union and 52% to other European countries.

More than half exported to North America (59%) and Asia (57%), while around half (48%) exported to the Middle East, around four in ten (38%) exported to Africa and three in ten (30%) exported to Latin America and the Caribbean. These findings were in line with the previous year.

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

Chart 3.8.12 Regions organisations export to or exported to previously – Webinars



Qcurexp – Do you currently or did you export to any of the following regions? Base: All businesses who used the service and who have exported (n=914 (2021/22), n=296 (2022/23)).

Table 3.8.1 Regions organisations export to or exported to previously – Webinars

Region	% (21/22)	CI (+/-) (21/22)	% (22/23)	CI (+/-) (22/23)	Change
Europe	79%	3%	78%	5%	-
European Union	73%	3%	72%	5%	-
Other European countries	50%	3%	52%	6%	-
Asia (including Australia and New Zealand)	58%	3%	57%	6%	-
North America	53%	3%	59%	6%	-
Middle East	49%	3%	48%	6%	-
Africa	42%	3%	38%	6%	-
Latin America and the Caribbean	27%	3%	30%	5%	-

↑↓ Significant change from 2021/22 at 95% significance level

Qcurexp – Do you currently or did you export to any of the following regions? Base: All respondents who used the service and who have exported (n=914 (2021/22), n=296 (2022/23)).

4 Awareness and use of services

The survey examined how businesses first heard about DBT. It also assessed recall of whether the participating business had seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting.

Findings from OMIS, Export Opportunities, Business Profiles and Selling Online Overseas are shown below but are excluded from the commentary due to very low base sizes.

4.1 How businesses first heard about DBT

For most services or products, the most common way of finding out about DBT was through contacts in the private sector. The proportion citing this source was generally consistent between services (between 21% and 23%). The two exceptions were business using ESS-SDC and Export Academy, where the most frequent way of finding out about DBT was searching online (26% and 18% respectively), followed by contacts in the private sector (17% and 16% respectively).

Key changes since 2021/22:

- An increase in the proportion of Export and Investment Teams businesses who first heard about DBT through reading articles or seeing information (5%, up from 1% in 2021/22).
- An increase in the proportion of Missions businesses who first heard about DBT through contacts in the private sector (22%, up from 20% in 2021/22), replacing contacts in the public sector as the most frequent way of finding out about DBT.
- A decrease in the proportion of Webinars businesses who first heard about DBT through contacts in the public sector (10%, down from 18% in 2021/22) and an increase in the proportion who first heard about DBT through reading articles or seeing information (6%, up from 3% in 2021/22).
- A decrease in the proportion of Export Academy businesses who first heard about DBT through contacts in the private sector (16%, down from 21% in 2021/22), and an increase in those who first heard about DBT by searching online (18%, up from 13% in 2021/22, replacing private sector contacts as the most frequent way) and in those who first heard about DBT through reading articles or seeing information (8%, up from 5% in 2021/22).

Table 4.1.1 How businesses first heard about DBT, by product or service

Non-Digital Service	E&I Teams 21/22	E&I Teams 22/23	ITAs 21/22	ITAs 22/23	Missions 21/22	Missions 22/23
Contacts in the private sector	25%	22%	24%	21%	c	22% ↑
Contacts in the public sector	22%	15%	14%	12%	c	16%
Articles / information seen or read	1%	5% ↑	2%	2%	c	6%
Exporting is GREAT advertising campaign	-	1%	1%	1%	c	-
great.gov.uk website	1%	1%	3%	2%	c	c
Searched online	4%	4%	9%	9%	c	3%
Direct call from an ITA	1%	2%	5%	4%	c	4%
Exporting is GREAT truck	-	-	c	c	c	-
UK trade fair	5%	4%	2%	3%	c	4%
Overseas trade fair	1%	5%	1%	1%	c	2%
Unweighted base	166	245	1,479	1,277	c	195

Non-Digital Service	ESS-IM 21/22	ESS-IM 22/23	OMIS 21/22	OMIS 22/23	Posts 21/22	Posts 22/23
Contacts in the private sector	c	21%	c	c	20%	21%
Contacts in the public sector	c	10%	c	c	18%	15%
Articles / information seen or read	c	3%	c	c	2%	2%
Exporting is GREAT advertising campaign	c	1%	c	c	1%	c
great.gov.uk website	c	3%	c	c	2%	1%
Searched online	c	11%	c	c	8%	9%
Direct call from an ITA	c	4%	c	c	3%	3%
Exporting is GREAT truck	c	-	c	c	-	-
UK trade fair	c	-	c	c	2%	3%
Overseas trade fair	c	1%	c	c	1%	2%
Unweighted base	c	319	c	c	685	509

Non-Digital Service	ESS-SDC 22/23
Contacts in the private sector	17%
Contacts in the public sector	9%
Articles / information seen or read	-
Exporting is GREAT advertising campaign	-
great.gov.uk website	12%
Searched online	26%
Direct call from an ITA	-
Exporting is GREAT truck	-
UK trade fair	1%
Overseas trade fair	1%
Unweighted base	103

Digital Service	Webinars 21/22	Webinars 22/23	Export Opportunities 21/22	Export Opportunities 22/23
Contacts in the private sector	24%	23%	19%	c
Contacts in the public sector	18%	10% ⬇	24%	c
Articles / information seen or read	3%	6% ⬆	2%	c
Exporting is GREAT advertising campaign	1%	1%	2%	c
great.gov.uk website	3%	1%	3%	c
Searched online	8%	9%	15%	c
Direct call from an ITA	3%	2%	2%	c
Exporting is GREAT truck	c	-	-	c
UK trade fair	2%	3%	6%	c
Overseas trade fair	1%	2%	-	c
Unweighted base	1,155	362	102	c

Digital Service	Business Profiles 21/22	Business Profiles 22/23	Selling Online Overseas 21/22	Selling Online Overseas 22/23
Contacts in the private sector	c	c	c	c
Contacts in the public sector	c	c	c	c
Articles / information seen or read	c	c	c	c
Exporting is GREAT advertising campaign	c	c	c	c
great.gov.uk website	c	c	c	c
Searched online	c	c	c	c
Direct call from an ITA	c	c	c	c
Exporting is GREAT truck	c	c	c	c
UK trade fair	c	c	c	c
Overseas trade fair	c	c	c	c
Unweighted base	c	c	c	c

Digital Service	Export Academy 21/22	Export Academy 22/23	
Contacts in the private sector	21%	16%	⬇
Contacts in the public sector	13%	11%	
Articles / information seen or read	5%	8%	⬆
Exporting is GREAT advertising campaign	1%	1%	
great.gov.uk website	3%	3%	
Searched online	13%	18%	⬆
Direct call from an ITA	4%	3%	
Exporting is GREAT truck	c	c	
UK trade fair	1%	2%	
Overseas trade fair	c	1%	
Unweighted base	654	914	

c Cells have been suppressed to protect confidentiality

QContDIT – How did you first hear about DBT (or its predecessor, DIT)? Includes only questionnaire pre-codes. Base: All respondents.

4.2 Awareness of advertising

Across most services or products, the majority of businesses said they recalled seeing or hearing advertising, publicity or other types of information encouraging businesses to think about exporting, with Missions users being the most likely to say this (67%), followed by Export and Investment Teams users (62%). The exception was ESS-SDC businesses, where 41% said they recalled seeing or hearing such advertising.

Key changes since 2021/22:

- Webinars users were less likely to recall seeing or hearing advertising or publicity about exporting compared to the previous year (60%, down from 68% in 2021/22).
- Export Academy users were less likely to be unsure whether they had seen or heard advertising or publicity about exporting (2%, down from 4% in 2021/22).

Table 4.2.1 Whether businesses had seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting (OMIS, Export Opportunities, Business Profiles and Selling Online Overseas results should be treated with caution due to very low base sizes)

Non-Digital Service	E&I Teams 21/22	E&I Teams 22/23	ITAs 21/22	ITAs 22/23	Missions 21/22	Missions 22/23
Yes	57%	62%	60%	60%	c	67%
No	42%	34%	38%	38%	c	31%
Don't know	2%	4%	2%	2%	c	2%
Unweighted base	116	245	1,479	1,277	c	195

Non-Digital Service	ESS-IM 21/22	ESS-IM 22/23	OMIS 21/22	OMIS 22/23	Posts 21/22	Posts 22/23
Yes	c	59%	c	c	62%	58%
No	c	39%	c	c	37%	40%
Don't know	c	2%	c	c	1%	2%
Unweighted base	c	319	c	c	685	509

Non-Digital Service	ESS-SDC 22/23
Yes	41%
No	58%
Don't know	1%
Unweighted base	103

Digital Service	Webinars 21/22	Webinars 22/23	Export Opportunities 21/22	Export Opportunities 22/23
Yes	68%	60% ↓	53%	c
No	28%	37% ↑	42%	c
Don’t know	4%	2%	4%	c
Unweighted base	1,155	362	102	c

Digital Service	Business Profiles 21/22	Business Profiles 22/23	Selling Online Overseas 21/22	Selling Online Overseas 22/23
Yes	c	c	c	c
No	c	c	c	c
Don’t know	c	c	c	c
Unweighted base	c	c	c	c

Digital Service	Export Academy 21/22	Export Academy 22/23
Yes	62%	59%
No	34%	39%
Don’t know	4%	2% ↓
Unweighted base	654	914

c Cells have been suppressed to protect confidentiality

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

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enquiries@businessandtrade.gov.uk.