Department for
Business & Trade

Export client quality survey for businesses supported April 2020 to March 2021

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

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1. Executive Summary

1.1. Introduction

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

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

The ECS comprises two linked surveys: a Quality Survey and a Reported Impact Survey. This report presents findings from the Quality Survey[1]. The findings are based on 5,356 interviews conducted by Ipsos UK, among businesses that received support from DIT between April 2020 and March 2021.

1.2. International Trade Advisers (ITAs)

The net promoter score (NPS, a summary of how likely businesses were to recommend using the service) for ITAs was +41, which was a rise compared to +37 in the previous year. Six in ten users (59%) were 'Promoters', i.e. likely to recommend the service, and this represents an increase from last year (54% in 2019/20). Around one in five (18%) were 'Detractors', i.e. unlikely to recommend the service.

Satisfaction with ITAs also increased this year (80% compared to 77% in 2019/20). Users were particularly positive about the comprehensiveness of information (80% compared to 75% in 2019/20) and the quality of contacts they had received through the service (74% compared to 70% in 2019/20). As a result of using this service, more businesses said they had researched the paperwork or regulations needed to export (56% compared to 50% in 2019/20), looked for other export services (27% compared to 23% in 2019/20) or used other services (17% compared to 13% in 2019/20).

1.3. Export and Investment Teams

Businesses' likelihood of recommending the Export and Investment Teams service did not see a significant change on the previous year with a Net Promoter Score of +30. Around half of users (48%) were 'Promoters' of the Export and Investment Teams service, while one in five (18%) were 'Detractors'.

Three-quarters (74%) were satisfied with the service. Users in 2020/21 were more positive about being clear on the steps they needed to take when using the service (77% compared to 63% in 2019/20). More businesses also said Export and Investment Teams had helped to increase their knowledge of the exporting process (50% compared to 36% in 2019/20), while fewer users said that their capacity to export was a barrier (20% compared to 31% in 2019/20). As a result of using the service, more businesses said they had researched the paperwork or regulations needed to

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

export (51% compared to 35% in 2019/20) or had used other services (21% compared to 9% in 2019/20).

1.4. Posts

The net promoter score (NPS, a summary of how likely businesses were to recommend using the service) for Posts was +23, which was a decline compared to +30 in the previous year. Businesses were less positive about the Posts service compared to the previous year. Around four in ten users (44%) were 'Promoters' of the service, while one in five (21%) were 'Detractors'. This may have been driven by declines in the proportion of businesses dealing with both the Middle East and Asia Pacific who were likely to promote the service. Those who were dissatisfied felt that the service did not give them enough information or advice, did not do anything for them or did not help them.

Around seven in ten (73%) were satisfied with the service, in line with the previous year. More businesses were positive about staff knowledge (85% compared to 78% in 2019/20), and how clear they were on the steps that they needed to take, both when using the service (74% compared to 63% in 2019/20) and afterwards (63% compared to 56% in 2019/20). As a result of using the Posts service, more businesses said they had researched the paperwork or regulations needed to export (49% compared to 40% in 2019/20) or had looked for other export services (27% compared to 20% in 2019/20).

1.5. Missions

The net promoter score (NPS, a summary of how likely businesses were to recommend using the service) for Missions was +28, which was in line with +33 in the previous year. Half of users (51%) were 'Promoters' of the service, while one in five (22%) were 'Detractors', in line with the previous year.

Satisfaction with Missions declined this year (72% compared to 85% in 2019/20), and users were also less likely to say that the service had met their needs (58% compared to 73% in 2019/20). Users were less positive about the quality of contacts they were provided with (61% compared to 76% in 2019/20), which might have been driven by disruption to the delivery of the service caused by Covid-19. However, as a result of using the service, more businesses said they had made a deal that would yield exports (29% compared to 16% in 2019/20). Businesses felt that the service could be improved by having support that was more tailored or relevant to their industry or sector (21%), or by providing better networking opportunities or higher quality leads (14%).

1.6. Overseas Business Network Initiative (OBNI)

The net promoter score (NPS, a summary of how likely businesses were to recommend using the service) for OBNI was +13, which was in line with +12 in the previous year. Four in ten users (41%) were 'Promoters', while a quarter (27%) were 'Detractors'. This was in line with the previous year.

Around two-thirds of users (65%) were satisfied with OBNI. These findings were in line with the previous year. Businesses were more positive about the comprehensiveness of the information they received in 2020/21 (72% compared to 58% in 2019/20), and fewer businesses were negative about staff knowledge (2% compared to 9% in 2019/20).

There were some differences in the profile of businesses that had used OBNI compared to the previous year. For example, OBNI users in 2020/21 were more likely to have had some experience of exporting (9% had never exported before, down from 18% in 2019/20), and more businesses had exported to the Middle East (70% compared to 56% in 2019/20), Africa (56% compared to 37% in 2019/20) and South America (42% compared to 27% in 2019/20). It is possible that these changes in the profile of users may have influenced views of the OBNI service.

1.7. Webinars

In 2020, DIT expanded its service offering to deliver webinars that could provide specific advice and information relevant to COVID-19 and the EU Exit. As a result, reporting differentiates between these and the standard Webinar offer.

The net promoter score (NPS, a summary of how likely businesses were to recommend using the service) for Webinars was +14, which was a decline from +19 in the previous year. The Webinars service performed well, but businesses were less positive about it compared to the previous year. Four in ten users (40%) were 'Promoters', and just over a quarter (27%) were 'Detractors'. These findings might be explained by the introduction of new EU-Exit and COVID-19 content as there were no significant differences when comparing the standard Webinar offer across years.

Satisfaction with the overall Webinars service also decreased this year (68% compared to 74% in 2019/20), and fewer businesses felt that the service had met their needs (57% compared to 64% in 2019/20). However, as a result of using the Webinars service, more businesses had researched the paperwork and regulations needed to export (57% compared to 48% in 2019/20) and had secured finance or funding (6% compared to 2% in 2019/20). At the same time, fewer businesses said they had commissioned bespoke research in a specific market (10% compared to 14% in 2019/20), and fewer non-exporting businesses had assessed the company's readiness to export (38% compared to 58% in 2019/20). These differences might also be due to the introduction of new EU-Exit and COVID-19 content in 2020/21.

1.8. Export Opportunities

The net promoter score (NPS, a summary of how likely businesses were to recommend using the service) for Export Opportunities was -15, which – given the small base sizes for this service – was not significantly different from -34 in the previous year. The likelihood of recommending the Export Opportunities service increased this year (27% compared to 16% in 2019/20), although businesses remained more likely to be 'Detractors' (42%) than 'Promoters' (27%).

Around four in ten users (42%) were satisfied with the service. As a result of using this service, more businesses said they had researched the paperwork and regulations needed to export (48% compared to 38% in 2019/20).

2. Introduction

2.1. Background to the research and objectives

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

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

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

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

2.2. The Export Client Survey

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

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

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

The ECS comprises two linked surveys: a Quality Survey and a Reported Impact Survey. Owing to a contract transition period and operational issues, interviewing for the Quality Survey began in December 2020 (contacting businesses that had an interaction with DIT between April to August 2020).

This report presents findings from the Quality Survey; this is a telephone survey reporting on the number of unique companies supported by DIT, the perceived quality of the advice and support, and firms' satisfaction with the service received by product or service. The findings in this report are based on interviewing businesses who used DIT services between April 2020 and March 2021 (2020/21). Throughout this report findings from businesses that used DIT services in 2020/21 are compared to findings from the 2019/20 survey.

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[2] Export Strategy 2021

2.3. Sample frame and fieldwork

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

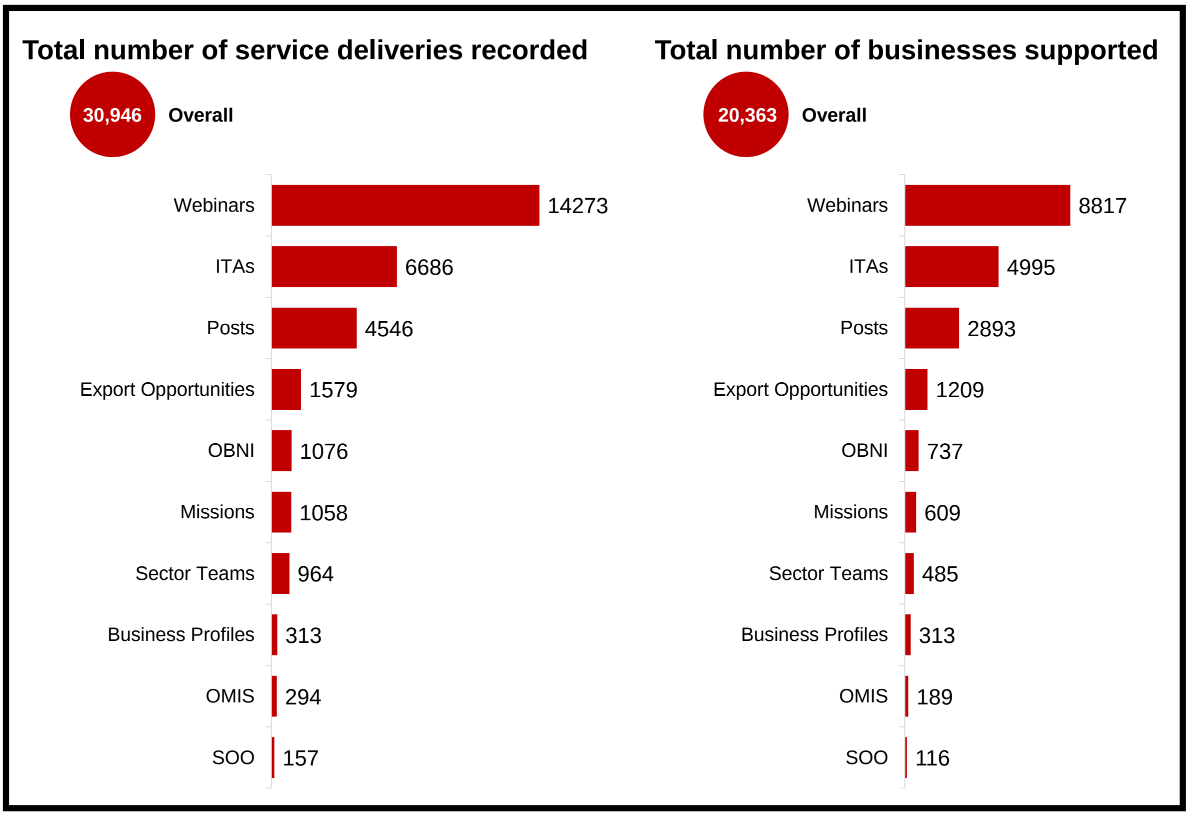
Table 2.3.1 DIT export promotion services

Service	Service description	Interviews achieved (2020/21)
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.	1,526
Export and Investment Teams (Sector Teams)[3]	Work directly with industry and the international network to facilitate collaboration between UK businesses, co-ordinate government to government engagement, and support trade missions.	113
Posts	An overseas network that provides in-depth knowledge of local markets, and access to reliable contacts to enhance UK firms' export competitiveness.	622
Missions	Services related to events (trade fairs and market research) but with a specific focus on face-to-face deal-making.	143
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.	42
Overseas Business Network Initiative (OBNI)	Provides information about an overseas market and contacts for possible customers or business partners. It can also provide other help, such as planning and organising events or promotional activity in overseas markets.	127
Selling Online Overseas (SOO)	An online service containing details of some of the leading e-marketplaces and details of special deals negotiated by DIT.	33
Export Opportunities	An online service on great.gov.uk which promotes global exporting opportunities to UK companies	304
Business Profiles	An online service which enables users to promote products and services to international buyers.	68
Webinars	Aim to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting.	2,378

In total, we received around 31,000 service deliveries related to the services covered by the ECS between April 2020 and March 2021. From these records, around 20,000 individual unique businesses were supported through all the services covered by the ECS between this period. This includes the services that are not covered in depth in this report due to insufficient sample being available.

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

Chart 2.3.1: Service deliveries recorded and businesses supported, by service type (April 2020 to March 2021)[4]



2.3.1. Fieldwork

Interviews were conducted using Computer-Assisted Telephone Interviewing (CATI). All respondents were sent an email prior to being contacted, to let them know the purpose of the research and provide them with an opportunity to contact Ipsos UK to ask any questions or opt out of the research. Fieldwork for this report began in December 2020 (interviewing businesses who received support from DIT between April to August 2020. This report covers DIT services delivered between April 2020 and March 2021, although the majority of the report only focuses on the services listed in section 1.3. The average interview length was 24 minutes and 29 seconds.

2.4. Methodology

2.4.1. Sample design

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

The sample was drawn from monthly records of service deliveries provided by DIT. These records do not include a unique company identifier. Therefore, each month, core company level information

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

– company names, email domains, postcodes and telephone numbers – were used to identify where multiple records referred to the same company.

Certain records were not eligible to be sampled each month:

- Records not pertaining to the services covered by the ECS
- Records which were clearly not intended for use (for example, those marked 'DUPLICATE' or 'DO NOT USE')
- Public sector companies (identified from the company name and email domain)
- Companies with non-UK telephone numbers (unless there was also a UK telephone number recorded for that company)
- Companies which had already been sampled for a previous month of the ECS. In order to reduce the burden of participating in research, a company is only included within the Quality Survey once in any 12-month period.

Where a sampled company had received more than one service in the previous month, they were allocated a single main service for the survey. Companies 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 break period between when a business interacts with DIT and when the interview is conducted. For example, interactions in January 2021 were included within the April 2021 sample etc. This is part of the survey design to ensure the interaction was recent enough to be memorable. A number of measures were implemented to aid recall and minimise the impact of this on the data, such as sending respondents an advance letter informing them about the survey or prompting respondents with the name of the service they used and when they used it.

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)[5]. Respondents could also say 'Don't know' or 'Not applicable'. Respondents who said the question did not apply to them were excluded from the analysis. Those who answered 'Don't know' or 'Refused' are generally included in the charts, unless no respondents gave this answer. However, where results are broken down by business turnover, 'Don't know' and 'Refused' answers are excluded to maximise year-on-year comparability.

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

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

Charts and tables in the report also display the Confidence Intervals (CI) for each survey estimate. When a survey is carried out, the respondents who take part are only a subset of those in the

[5] 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.

population and as such may not give an exact representation of the ‘true’ average in the population. These Confidence Intervals indicate the range within which the true value lies.

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

Findings for the Business Profiles, OMIS and Selling Online Overseas services have not been included in this report, due to small base sizes.

2.5.1. Weighting

The survey data is weighted to ensure that the achieved sample is as representative of the entire population of businesses supported as possible and accounts for (i) the number of businesses supported for each individual service, and (ii) the number of businesses supported each month.

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

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 (2019/20) in light of changes to service delivery, policy priorities and the ongoing COVID-19 pandemic. This included:

- New questions confirming how businesses were impacted during the initial lockdown (March to June 2020), and their current trading status (compared to February 2020),
- New questions to confirm whether businesses had contacted DIT in relation to their concerns about COVID-19 and, if so, their satisfaction with the outcome,
- A new question to measure satisfaction with the extent to which the other services that DIT had referred businesses to were relevant or not,
- Removal of all questions relating to the Tradeshow Access Programme,
- Minor improvements to the wording of questions or scripting instructions.

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

3. Product findings

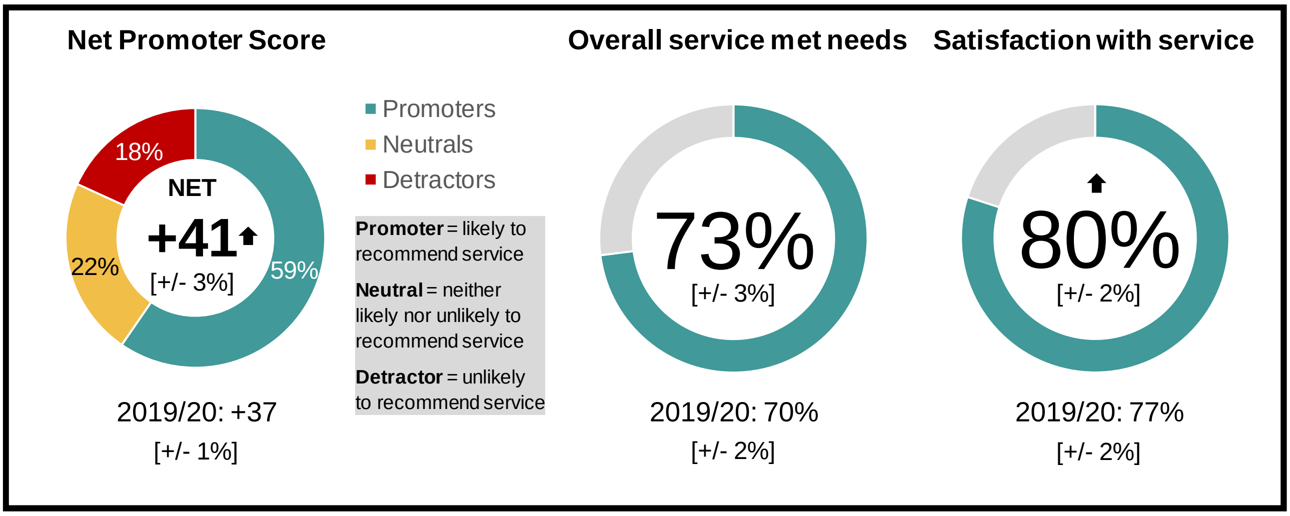
This chapter presents the key findings for each of the DIT services or products covered by the survey. Each service or product is covered in turn, with coverage of the key findings for the service or product; departmental metrics; and analysis of service or product performance. The analysis includes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

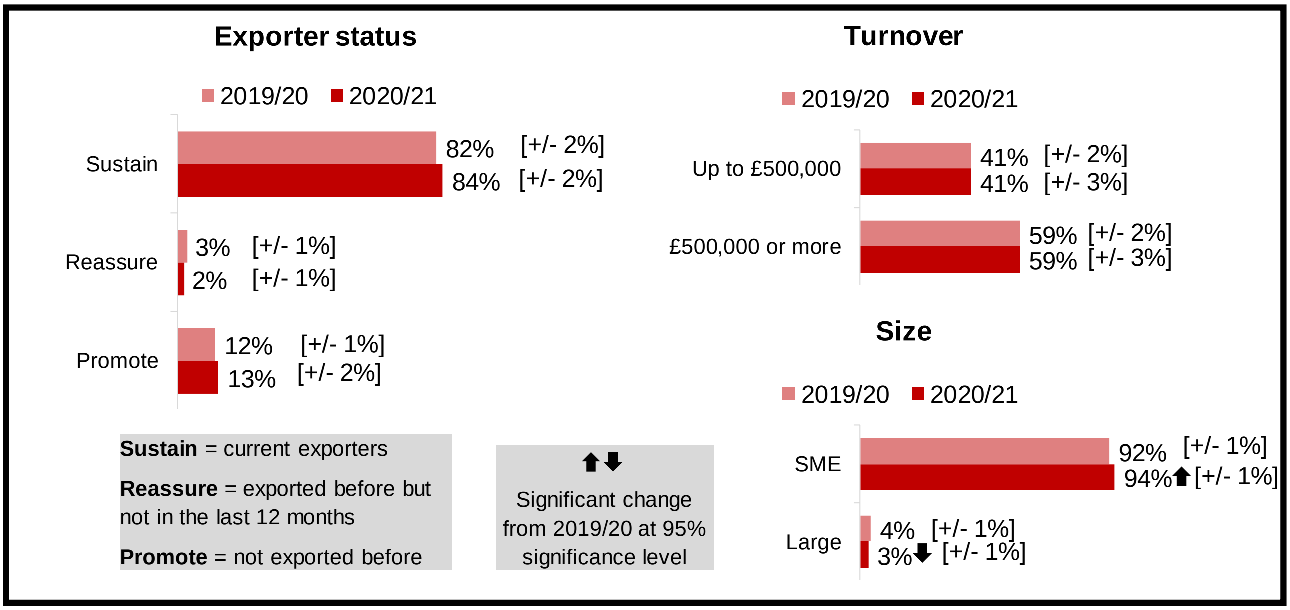
- **Net promoter score (NPS):** a summary of how likely it is that businesses would recommend using the service or product. Businesses were asked to provide a score between zero and ten, with ten being the most positive response. Scores of nine and ten were banded together as ‘promoters’ and scores of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

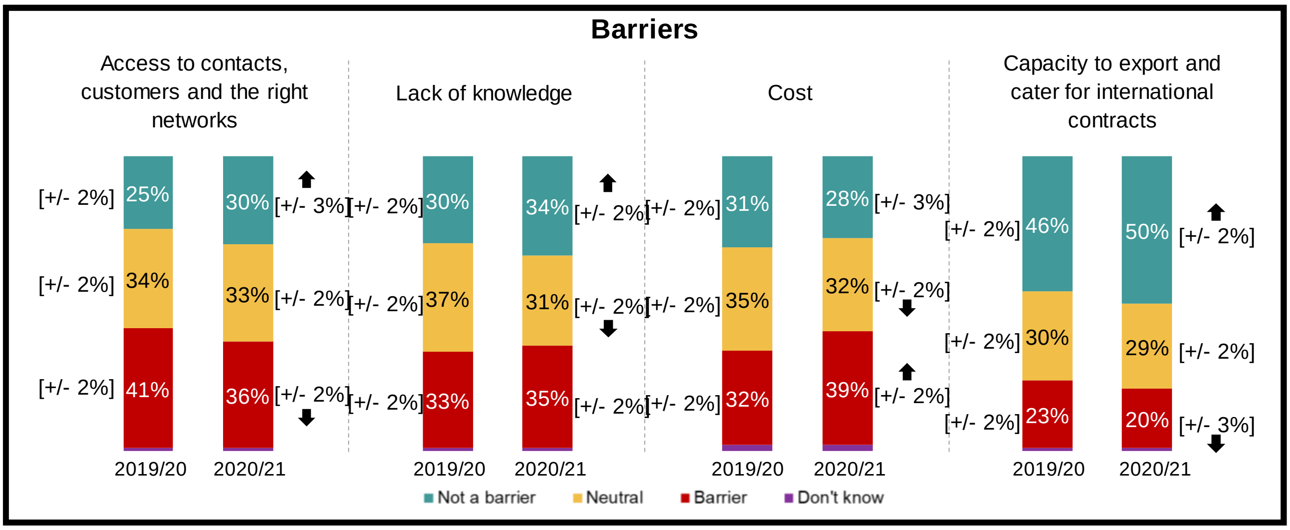
The findings for each DIT service or product are presented alongside the findings from 2019/20. Only changes that are statistically significant are highlighted in the text. Charts and tables represent a statistically significant increase from 2019/20 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

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

Summary: International Trade Advisers (ITAs)







3.1. International Trade Advisers (ITAs)

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

This chapter explores satisfaction with the ITA service, actions taken as a result of using the service, and the exporting profile of service users. The findings are based on interviews with 1,526 businesses who used an ITA between April 2020 and March 2021.

Key changes since 2019/20:

The NPS for ITAs was +41, which was a rise compared to +37 in the previous year. Satisfaction with ITAs increased this year (80% compared to 77% in 2019/20), as did users' likelihood of recommending the service (59% compared to 54% in 2019/20). Users were particularly positive about the comprehensiveness of information (80% compared to 75% in 2019/20) and the quality of contacts they had received through the service (74% compared to 70% in 2019/20). As a result of using this service, more businesses said they had researched the paperwork or regulation needed to export (56% compared to 50% in 2019/20), looked for other export services (27% compared to 23% in 2019/20) or used other services (17% compared to 13% in 2019/20).

However, more users were likely to report costs as a barrier to exporting this year (39% compared to 32% in 2019/20). Fewer users exported to Europe (85% compared to 89% in 2019/20) and Asia[6] (60% compared to 64% in 2019/20) in 2020/21.

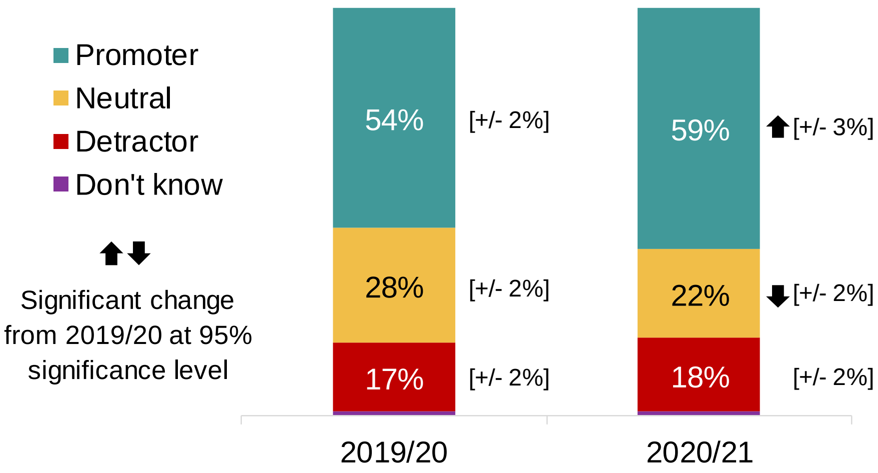
3.1.1. Satisfaction with the ITA service

3.1.1.1 Service performance

Businesses were positive about the ITA service and were likely to recommend it to colleagues and business associates. Six in ten users (59%) were 'Promoters', i.e. likely to recommend the service, and one in five (18%) were 'Detractors', i.e. unlikely to recommend the service[7]. Comparison with findings from the previous year showed that likelihood of recommending the ITA service increased this year (59% compared to 54% in 2019/20). The findings may be explained by increases in the proportion of businesses that were positive about the comprehensiveness of information received (80% compared to 75% in 2019/20), and the quality of contacts provided (74% compared to 70% in 2019/20).

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

Chart 3.1.1 Likelihood of recommending service (NPS) – ITAs



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used ITAs (n=1,526).

The likelihood of recommending this service varied by region. Businesses in the South West (NPS of 54) and North East (NPS of 53) were most likely to promote the service, followed by those in Yorkshire (NPS of 48). This is shown in Table 3.3.1.1 below.

Table 3.1.1 Net Promoter Score for service by ITA region

	2019/20			2020/21			
	NPS	CI (+/-)	Base	NPS	CI (+/-)	Base	Change
Overall	37	4%	2,402	41	4%	1,526	↑
South West	28	15%	128	54	17%	73*	↑
North East	54	11%	143	53	19%	65*	-
Yorkshire	35	10%	255	48	12%	182	↑
East England	31	13%	267	42	12%	209	↑
West Midlands	45	9%	337	39	10%	300	-
North West	38	9%	317	39	11%	212	-
South East	28	7%	498	38	12%	234	↑
East Midlands	43	10%	221	37	17%	112	-
London	37	12%	236	34	16%	139	-

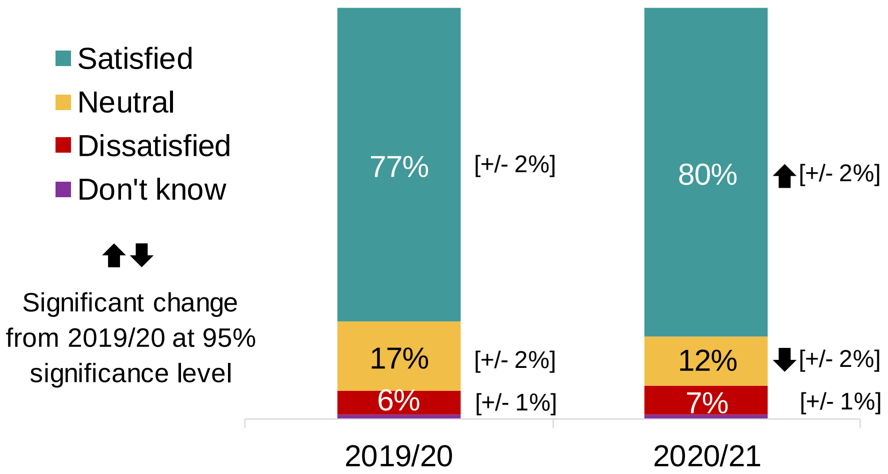
*Small base size – interpret with caution
↑↓ Significant change from 2019/20 at 95% significance level

Businesses felt that the service **could be improved** by having support that was more tailored or relevant to their industry or sector (15%). Just under one in ten suggested the service could provide better networking opportunities or higher quality leads, or could have offered more information, advice or guidance (both 7%). Around two in five businesses (43%) could not think of any ways in which the service could be improved[8].

3.1.1.2 Satisfaction

Satisfaction with ITAs also increased compared to the previous year. Eight in ten respondents (80%) said they were satisfied with their experience (compared to 77% in 2019/20), and seven percent said they were dissatisfied (in line with 6% in 2019/20)[9].

Chart 3.1.2 Satisfaction with service - ITAs



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used ITAs (excluding 'not applicable' responses) (n=1,509).

Satisfaction also varied by region. Businesses in the South West (89%) were most satisfied, followed by businesses in the North East (84%) and Yorkshire (83%). This is shown in Table 3.1.2.

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[8] When asked how the service could be improved, 29% said Don't know, 12% said Nothing, no improvement needed or the service was fine as it is, and 2% had no answer or no comment.

[9] 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

	2019/20			2019/20			
	Satisfied	**CI (+/-)**	**Base**	**Satisfied**	**CI (+/-)**	**Base**	**Change**
Overall	77%	2%	2,373	80%	2%	1,509	↑
South West	76%	8%	128	89%	11%	73*	-
North East	86%	6%	143	84%	11%	65*	-
Yorkshire	76%	6%	255	83%	7%	182	-
East Midlands	79%	6%	221	82%	8%	112	-
East England	71%	7%	267	80%	7%	209	↑
London	78%	6%	236	80%	8%	139	-
South East	73%	5%	498	79%	7%	234	-
North West	79%	5%	317	77%	7%	212	-
West Midlands	80%	5%	337	76%	5%	300	-

↑↓ Significant change from 2019/20 at 95% significance level

Of the 121 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction**[10] was feeling that the service did not do anything for them or did not help them (57%). A similar proportion of businesses felt that they did not get enough information or advice (55%), and around half as many reported that the advice was more relevant to other types of businesses (27%, up from 13% in 2019/20).

3.1.1.3 Whether overall service met needs

Businesses were positive that the ITA service had met their needs; almost three-quarters (73%) rated it as good, and one in ten (11%) rated it as poor[11]. These findings were in line with the previous year.

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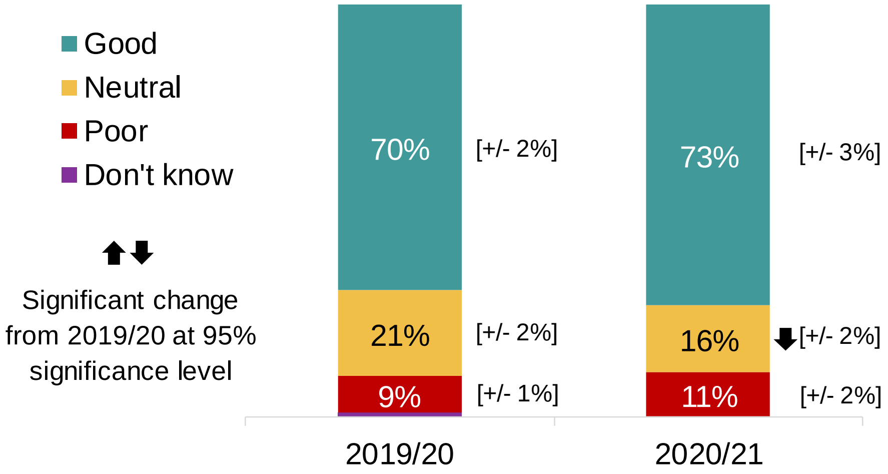
[10] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.

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

Chart 3.1.3 Rating of whether overall service met needs – ITAs



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used an ITA (excluding 'not applicable' responses) (n=1,488).

Businesses were most positive about staff knowledge (85%), followed by the amount of time taken to receive information (83%) and how comprehensive the information they received was (80%). They were least positive about how clear the steps were that they needed to take after using the service (71%)[12]. Compared to the previous year, more businesses were positive about the comprehensiveness of information received (80% compared to 75% in 2019/20), and the quality of contacts provided (74% compared to 70% in 2019/20).

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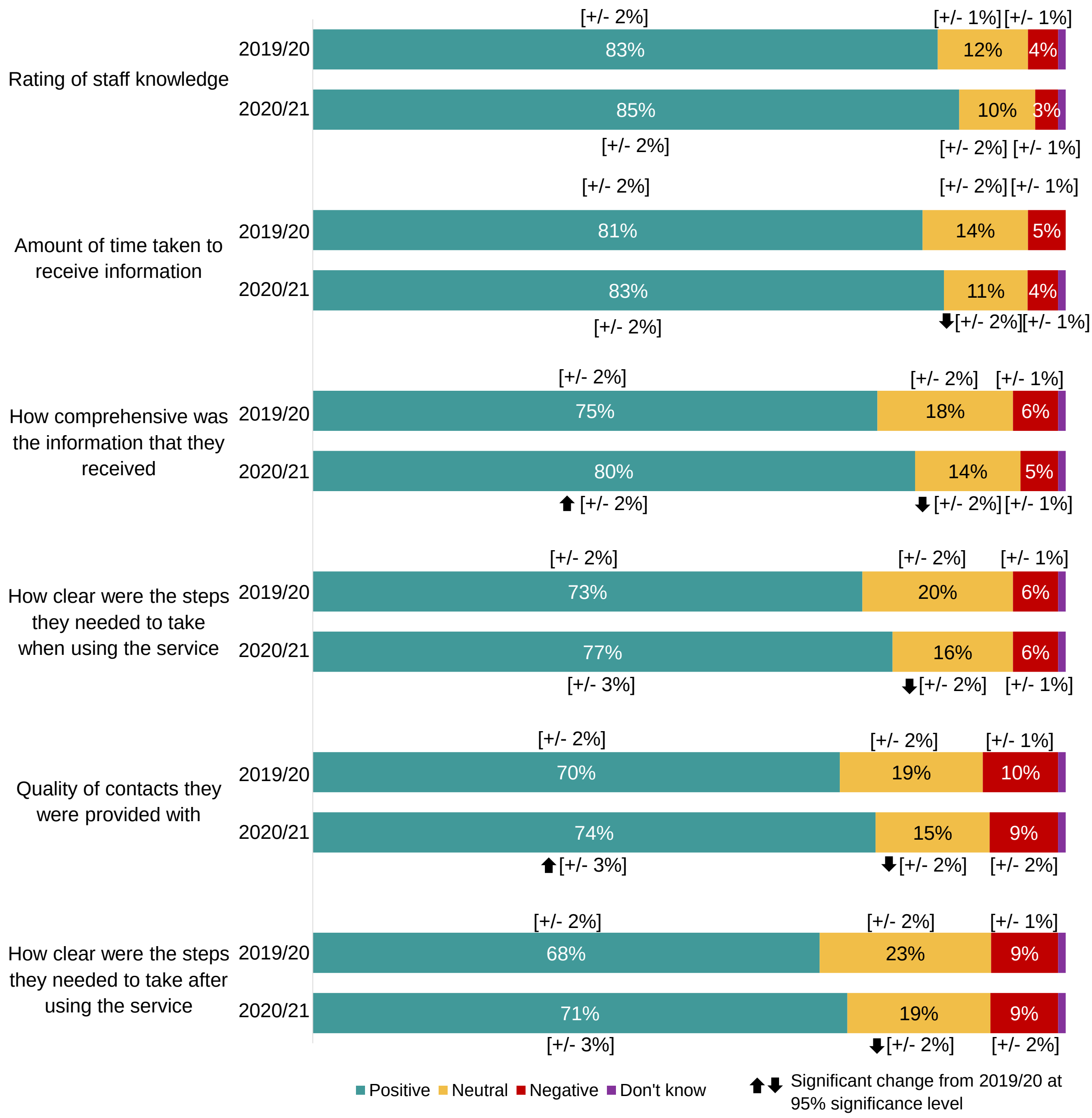
[12] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

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



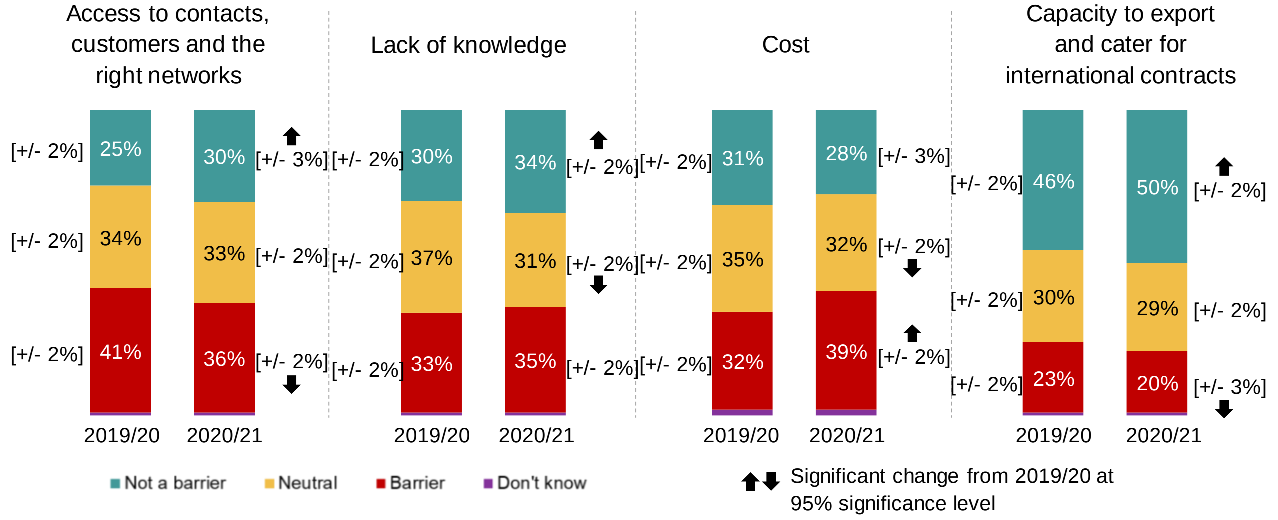
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=1,526). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=1,452). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=1,444). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=1,468). Qclarity_2 – The service made clear what I should do next after using it (n=1,440). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=1,292). Base: All respondents that used each service (excluding 'not applicable' responses).

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[13]. Four in ten (39%) reported cost as a barrier, up from the previous year (32% in 2019/20). Respondents were split about whether lack of knowledge is a barrier (35%) or not (34%), but the proportion thinking it is not a barrier was higher than in the previous year (30% in 2019/20). Users were less likely to perceive access to networks or their capacity to export as barriers, compared to the previous year. For example, users reporting capacity to export as a barrier fell from 23% in 2019/20 to 20% in 2020/21, and users reporting access to networks was a barrier fell from 41% in 2019/20 to 36% in 2020/21.

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 respondents that used ITAs (excluding 'not applicable' responses) (ranging from n=1,482 to n=1,508).

Firms exporting goods only were more likely to say cost is a barrier to exporting than firms only exporting services (42% versus 32% respectively). Capacity to export was cited as a barrier by more micro businesses (23%) than small and medium businesses (16% and 15% respectively), and by firms selling both goods and services (25%) compared to those selling only goods. Lack of access to networks was perceived to be a barrier for more micro firms (41%), firms that had been trading 1-5 years (44%) and 5-10 years (43%), and firms only exporting services (44%).

Businesses were asked whether using ITAs (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using ITAs had helped them understand how to increase their knowledge of the exporting process (52%), assess their capacity and readiness to export (38%), or to build overseas contacts or networks (34%). This was in line with the previous year.

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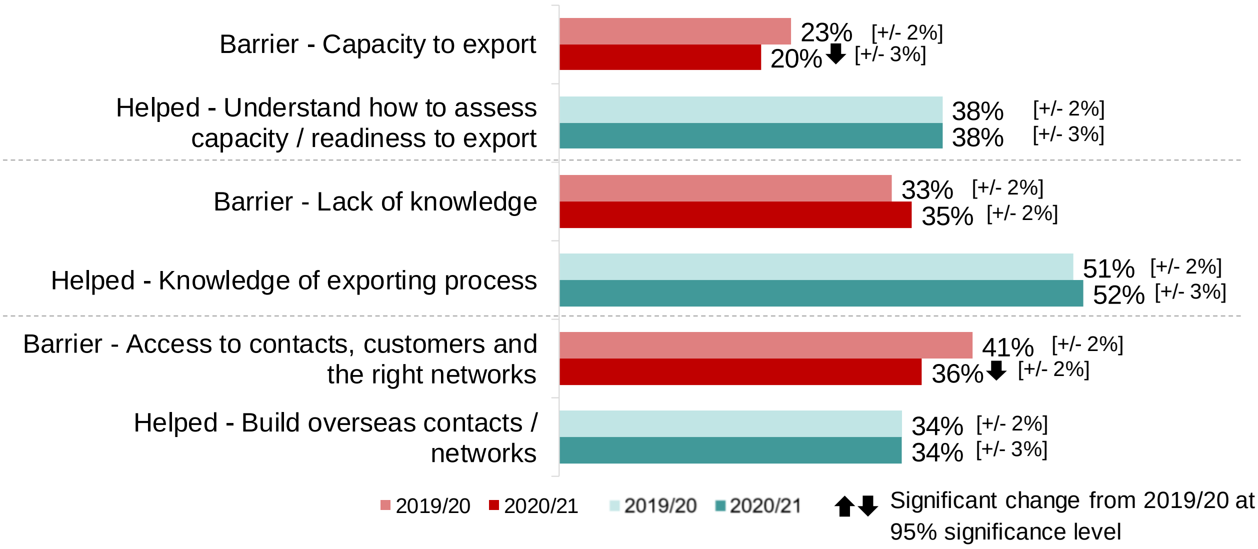
[13] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

Chart 3.1.6 Barriers to exporting and how DIT helped – ITAs



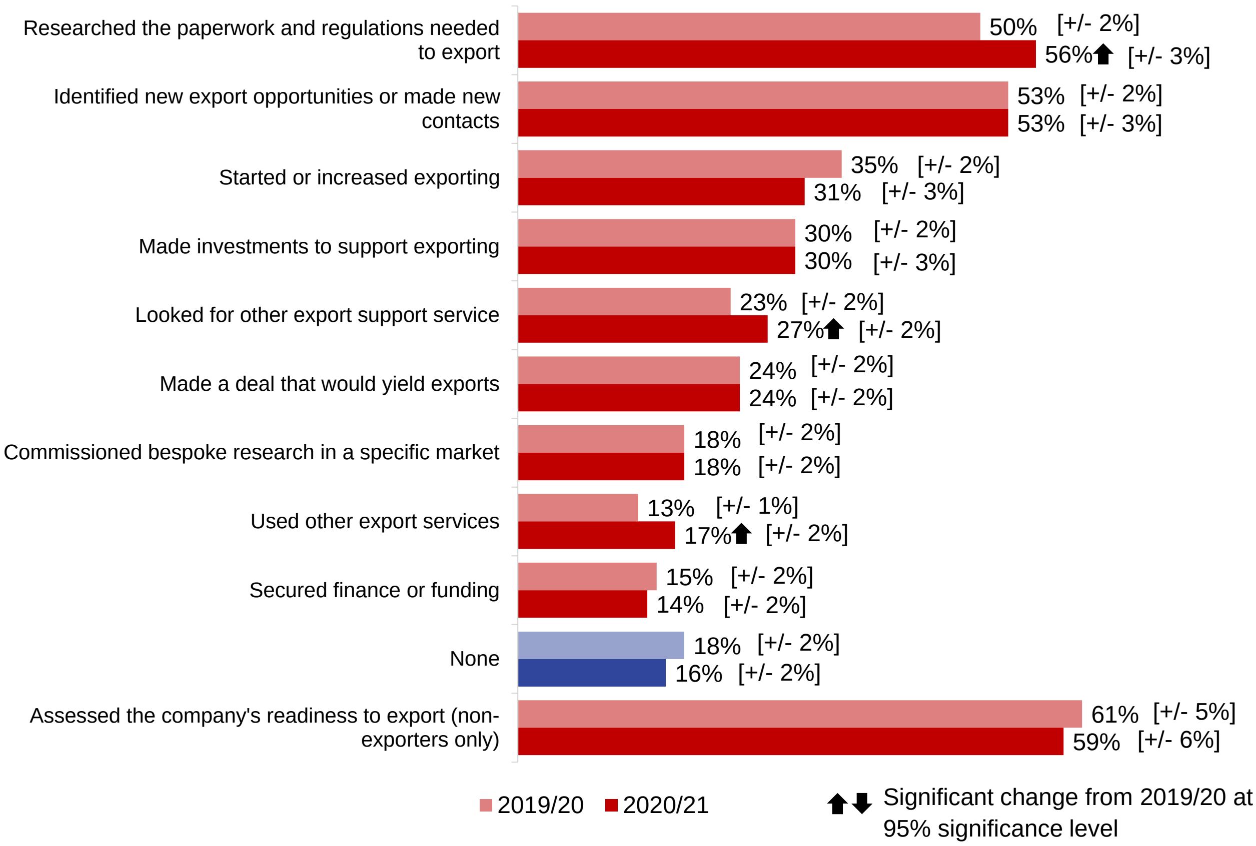
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used ITAs (excluding 'not applicable' responses) (ranging from n=1,482 to n=1,508).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks? Base: All respondents who used ITAs (n=1,526).

3.1.2.2 Taking action

Businesses had taken a range of actions as a result of using ITAs. Six in ten businesses (59%) that were not exporting at the time of using the service, had assessed the company's readiness to export. Among all businesses, just under six in ten (56%) said they had researched the paperwork and regulations needed to export. Slightly fewer had identified new export opportunities or made new contacts (53%). This was followed by starting or increasing exporting (31%) and making investments to support exporting (30%).

Overall, the proportion of businesses saying they had researched the paperwork and regulations needed to export increased compared to the previous year (56% compared to 50% in 2019/20), as did the proportion saying they had looked for other export support services (27% compared to 23% in 2019/20) or used other export services (17% compared to 13% in 2019/20).

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

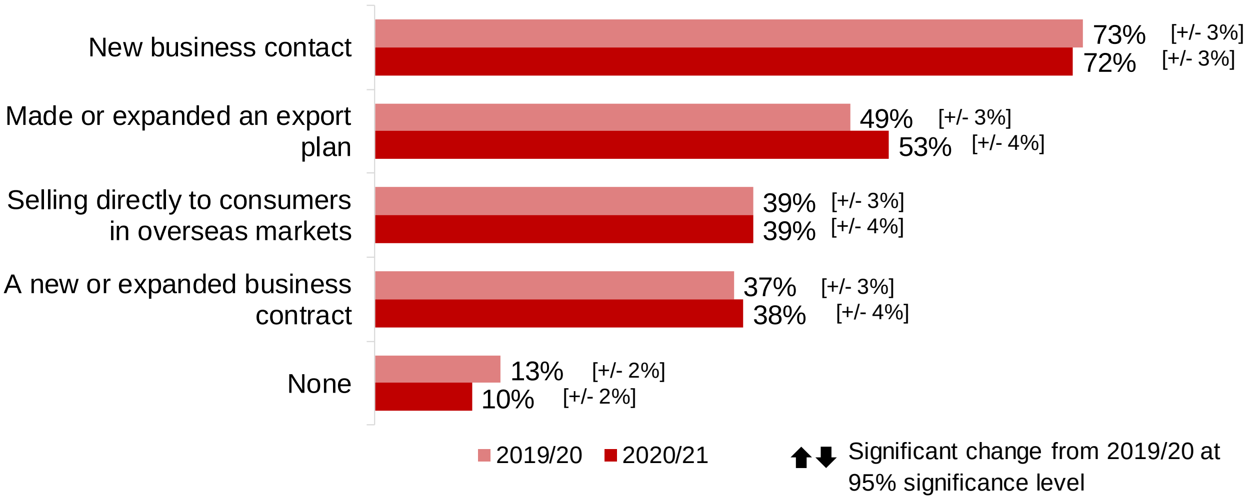


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used ITAs (n=1,526); Non-exporters (n=264).

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 (72%), followed by making or expanding an export plan (53%), selling directly to consumers in overseas markets (39%) or making a new or expanded business contract (38%). These findings were in line with 2019/20.

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



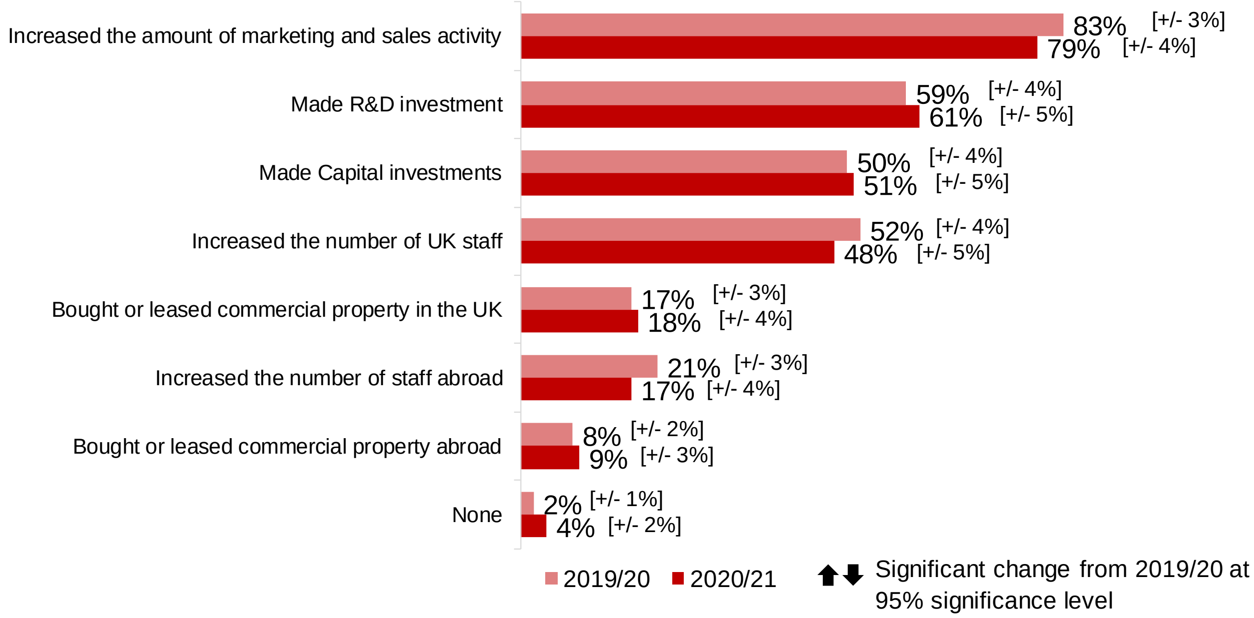
Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used ITAs who had identified a new business contact as part of the DIT service (n=898).

Among businesses that had identified a new business contact as part of the DIT service, just under half (46%) had made contact with a buyer and a similar proportion had made contact with a distributor (44%).

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 (30% overall), eight in ten (79%) said they had increased their marketing and sales activity, while six in ten made a Research and Development investment (61%) and half made capital investments (51%). These findings remain unchanged compared to the previous year. There were no statistically significant differences detected in the types of investment made by different types of exporter, due to small base sizes.

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

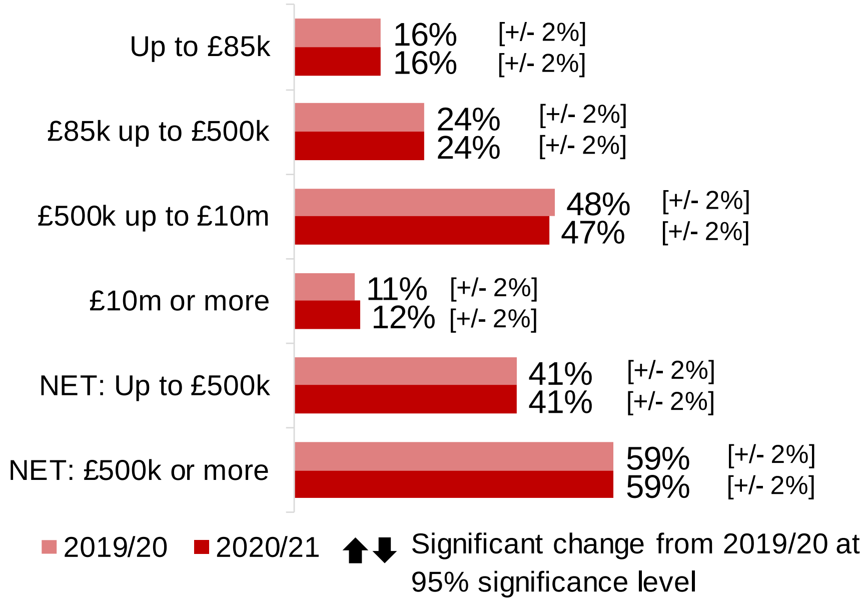


Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Only answers given by more than 3% of respondents are shown. Base: All respondents who had used ITAs and had made investments to support exporting (n=447).

3.1.3. Service use by firmographics and export behaviour

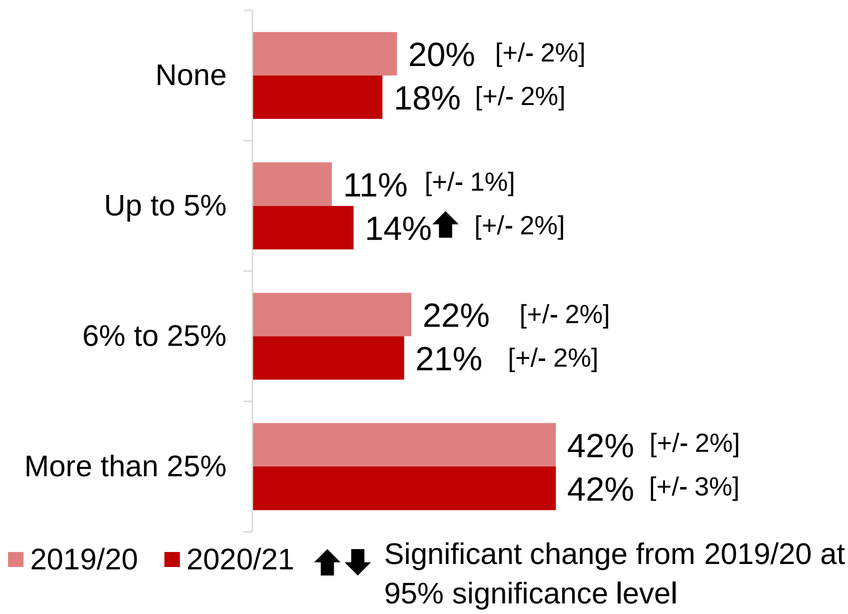
ITA service use was split between businesses with high turnovers of £500,000 or more (59%) and those with lower turnovers (41%), in line with the previous year. Four in ten firms (42%) reported that more than a quarter of their turnover came from exporting.

Chart 3.1.10 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used ITAs (excluding Don't know/Refused) (n=1,143).

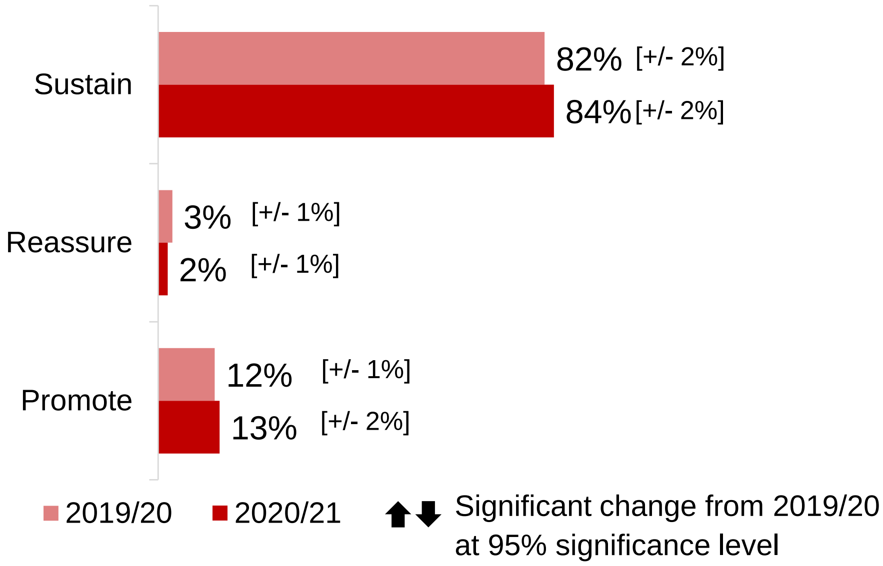
Chart 3.1.11 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used ITAs (n=1,526).

Current exporters made up the majority of businesses using the ITA service. Eight in ten businesses (84%) were currently exporting ('Sustain'), although 13 percent had never exported before ('Promote'). Only two percent had exported before but not in the past 12 months ('Reassure') [14]. This remained in line with the previous year.

Chart 3.1.12 Exporter status

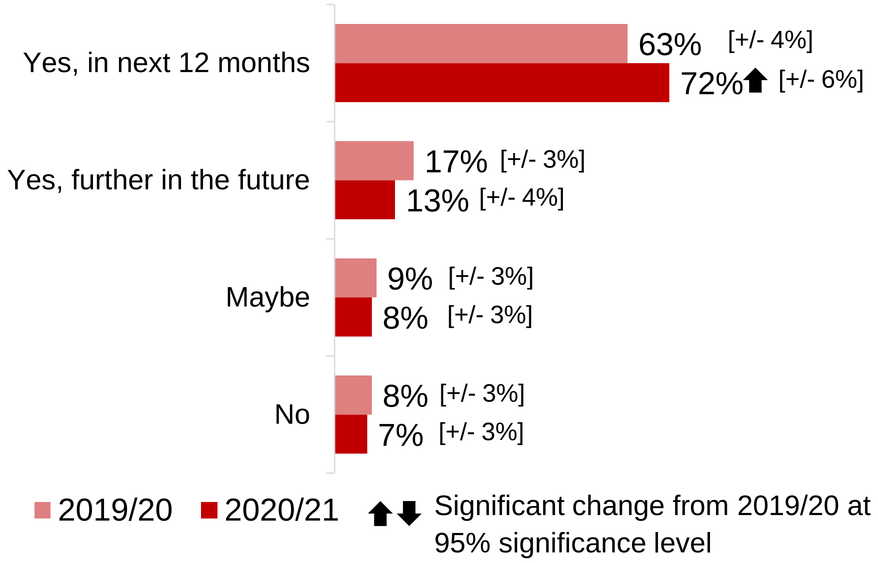


Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used ITAs (n=1,526).

Most former exporters using the ITA service had plans to export again. Almost three-quarters (72%) of those who were not currently exporting (but had done so previously), reported planning to export in the next 12 months. This was higher than in the previous year (63%).

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

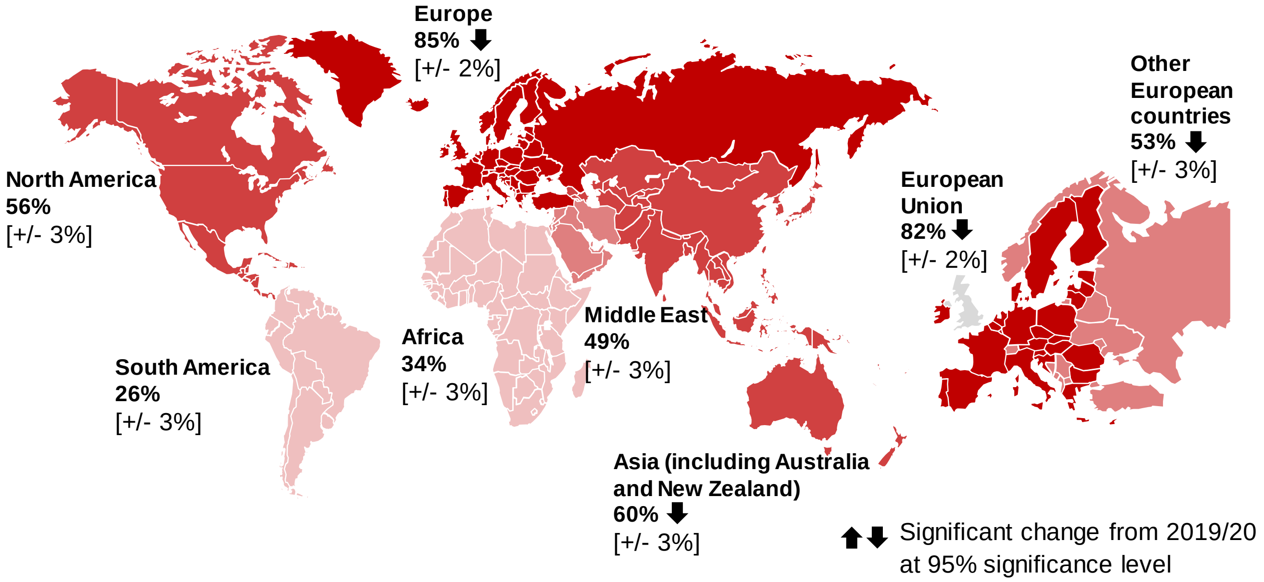
Chart 3.1.13 Non-exporter plans to sell overseas



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All respondents who used ITAs and who are not currently exporting but have previously sold goods or services overseas (n=262).

Europe remained the most common export market among ITA users, although this represents a fall from the previous year (falling from 89% to 85%). Among those who were currently exporting or had done so previously, more than eight in ten (82%) exported to the European Union (down from 86% in the previous year), followed by Asia (60%, down from 64%), North America (56%, similar to the 58% who did so in the previous year) and non-EU European countries (53%, down from 61%).

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



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used ITAs and who have exported (n=1,321).

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

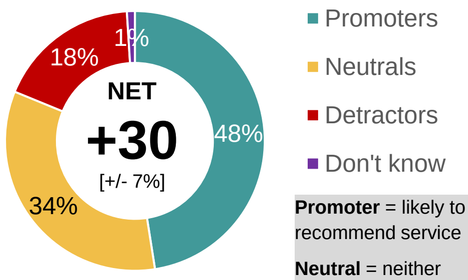
	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	89%	1%	85%	2%	↓
European Union	86%	2%	82%	2%	↓
Other European countries	61%	2%	53%	3%	↓
Asia (including Australia and New Zealand)	64%	2%	60%	3%	↓
North America	58%	2%	56%	3%	-
Middle East	51%	2%	49%	3%	-
Africa	37%	2%	34%	3%	-
South America	28%	2%	26%	3%	-

↑↓ Significant change from 2019/20 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used ITAs and who have exported (n=1,321).

Summary: Export and Investment Teams

Net Promoter Score



2019/20: +22

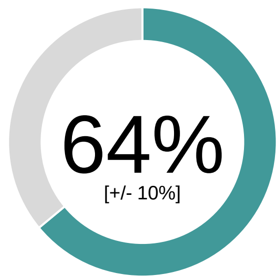
[+/- 4%]

Promoter = likely to recommend service

Neutral = neither likely nor unlikely to recommend service

Detractor = unlikely to recommend service

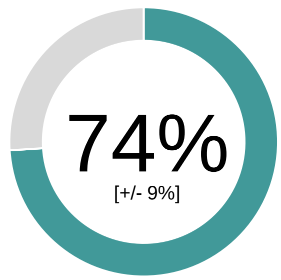
Overall service met needs



2019/20: 67%

[+/- 6%]

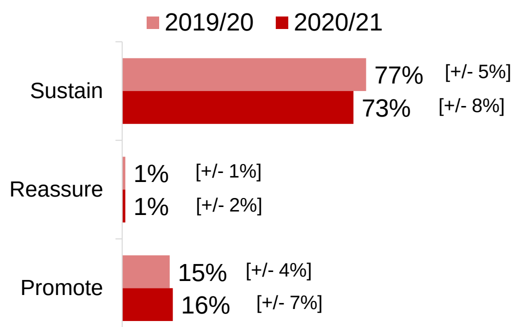
Satisfaction with service



2019/20: 74%

[+/- 5%]

Exporter status



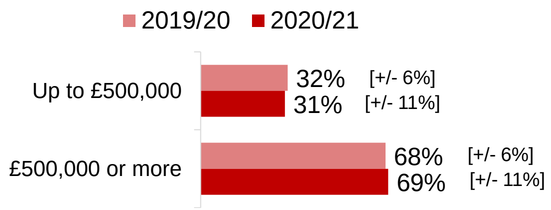
Sustain = current exporters

Reassure = exported before but not in the last 12 months

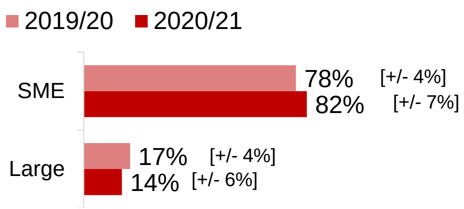
Promote = not exported before

⬆⬇ Significant change from 2019/20 at 95% significance level

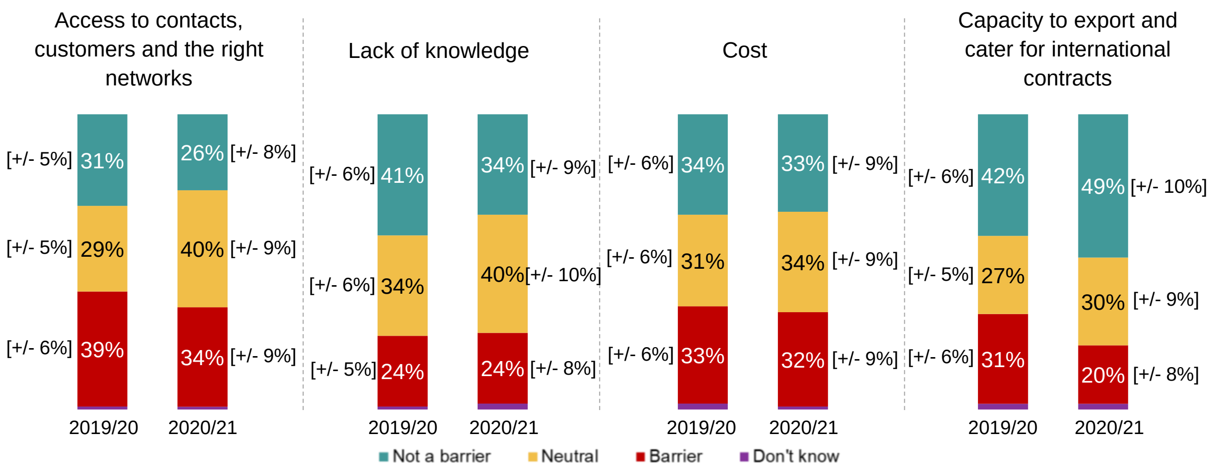
Turnover



Size



Barriers



3.2. 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 service users. The findings are based on interviews with 113 businesses that used Export and Investment Teams between April 2020 and March 2021.

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

Key changes since 2019/20:

The NPS for Export and Investment Teams was +30, which was in line with +22 in the previous year.

Satisfaction with Export and Investment Teams and overall attitudes to the service remained in line with the previous year. However, users in 2020/21 were more positive about being clear on the steps they needed to take when using the service (77% compared to 63% in 2019/20). More businesses also said Export and Investment Teams had helped to increase their knowledge of the exporting process (50% compared to 36% in 2019/20), while fewer users perceived their capacity to export was a barrier (20% compared to 31% in 2019/20). As a result of using the service, more businesses said they had researched the paperwork or regulations needed to export (51% compared to 35% in 2019/20) or had used other services (21% compared to 9% in 2019/20).

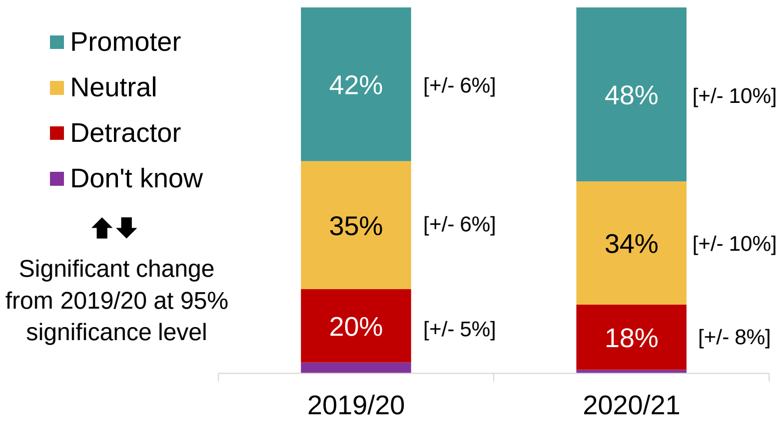
3.2.1. Satisfaction with the Export and Investment Teams service

3.2.1.1 Service performance

Businesses were positive about the Export and Investment Teams service and many said they would recommend it to colleagues and business associates. Around half of users (48%) were ‘Promoters’, i.e. likely to recommend the service, and one in five (18%) were ‘Detractors’, i.e. unlikely to recommend the service[15]. These findings were in line with the previous year.

[15] 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 3.2.1 Likelihood of recommending service (NPS) – Export and Investment Teams



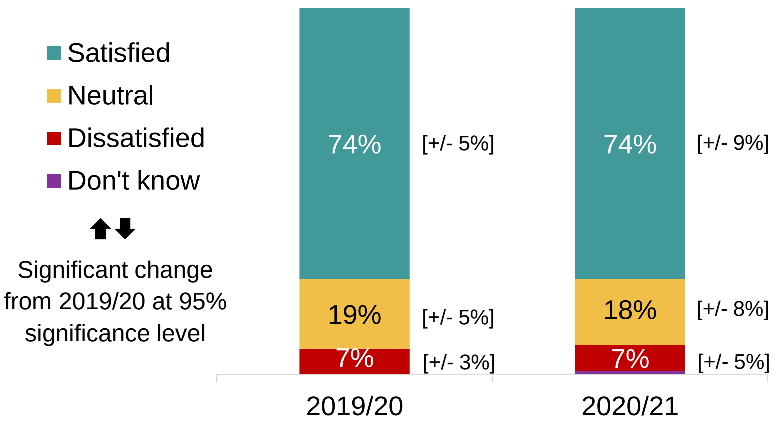
Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Export and Investment Teams (n=113).

Businesses felt that the service **could be improved** by having support that was more tailored or relevant to their industry or sector (17%). Around one in ten suggested the service could provide more information, advice or guidance (12%), or could provide better networking opportunities or higher quality leads (11%). Two in five (39%) could not think of any ways in which the service could be improved[16].

3.2.1.2 Satisfaction

Satisfaction with Export and Investment Teams remained in line with the previous year. Three-quarters of users (74%) said they were satisfied with their experience and seven percent said they were dissatisfied[17].

Chart 3.2.2 Satisfaction with service - Export and Investment Teams



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Export and Investment Teams (excluding 'not applicable' responses) (n=109).

[16] When asked how the service could be improved, 31% said Don't know, 6% said Nothing, no improvement needed or the service was fine as it is, and 1% had no answer or no comment.

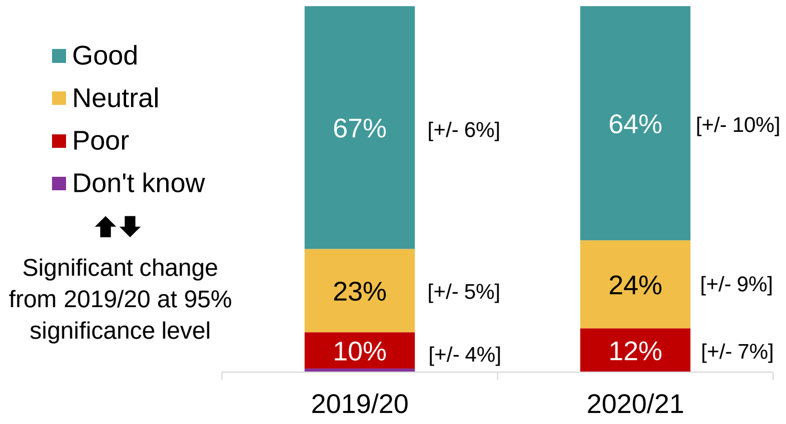
[17] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

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

3.2.1.3 Whether overall service met needs

The majority of businesses said that the overall service provided by Export and Investment Teams had met their needs; around two-thirds (64%) rated it as good, while around one in eight (12%) rated it as poor[18]. These findings were in line with the previous year.

Chart 3.2.3 Rating of whether overall service met needs – Export and Investment Teams



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Export and Investment Teams (excluding 'not applicable' responses) (n=107).

Businesses were most positive about staff knowledge (83%), and how comprehensive the information was that they received (79%). Compared to the previous year, more businesses were positive about the clarity of steps they needed to take when using the service (77% compared to 63% in 2019/20)[19]. Users were least positive about the clarity of steps they needed to take after using the service (63%).

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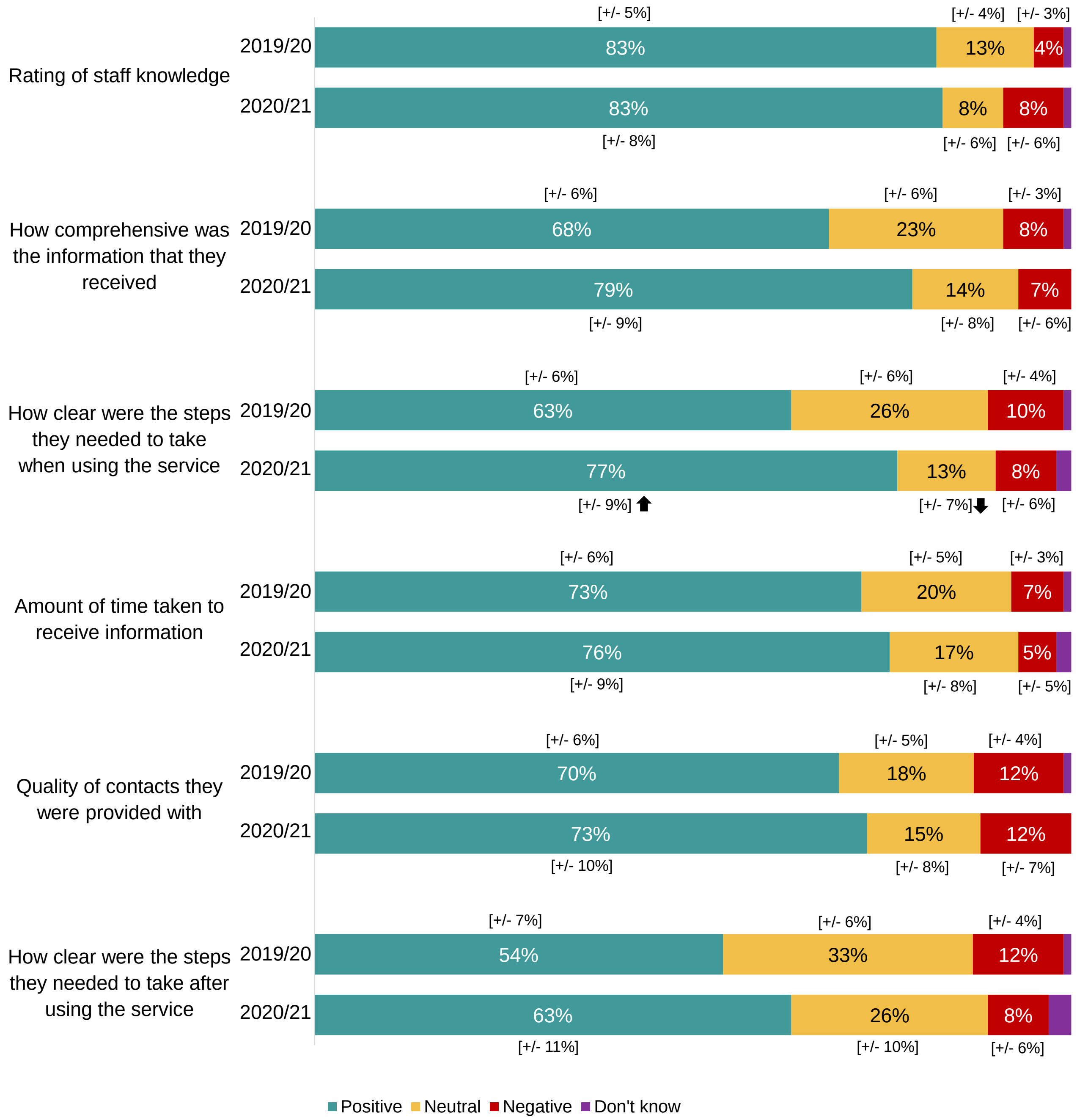
[18] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.
[19] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

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



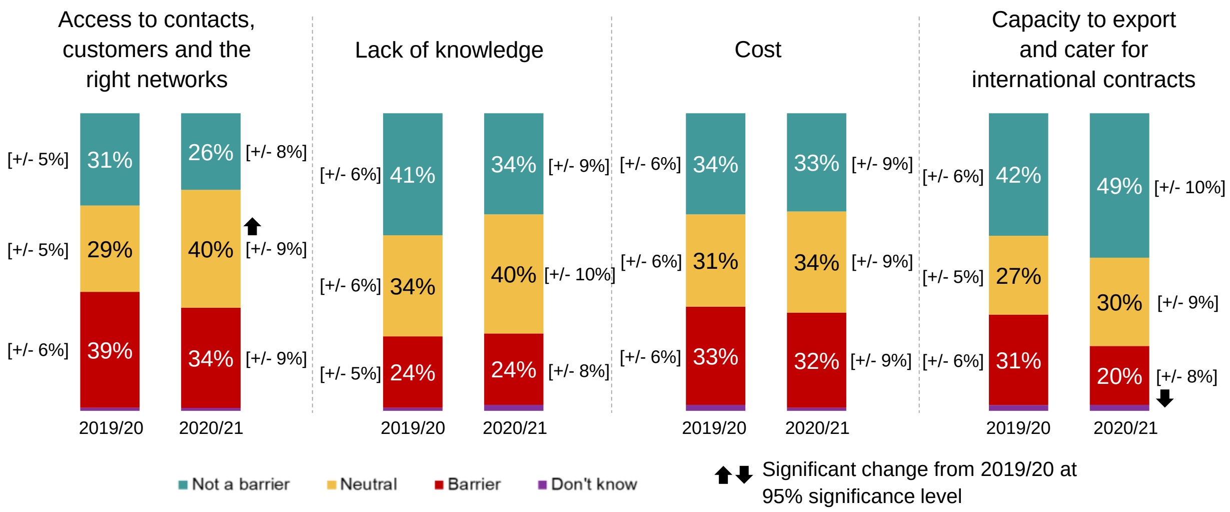
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=104). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=102). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=103). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=106). Qclarity_2 – The service made clear what I should do next after using it (n=102). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=103). Base: All respondents that used each service (excluding 'not applicable' responses).

3.2.2. Outcomes of using the Export and Investment Teams service

3.2.2.1 Counteracting the barriers to exporting

Businesses that used Export and Investment Teams reported facing barriers to exporting[20]. A third (34%) reported that access to networks was a barrier, and a similar proportion (32%) said that the cost of exporting was a barrier. Users were less likely to perceive lack of knowledge (24%) or their capacity to export (20%) as barriers. Compared to the previous year, fewer users perceived capacity to export as a barrier (20% compared to 31% in 2019/20).

Chart 3.2.5 Barriers to exporting – Export and Investment Teams

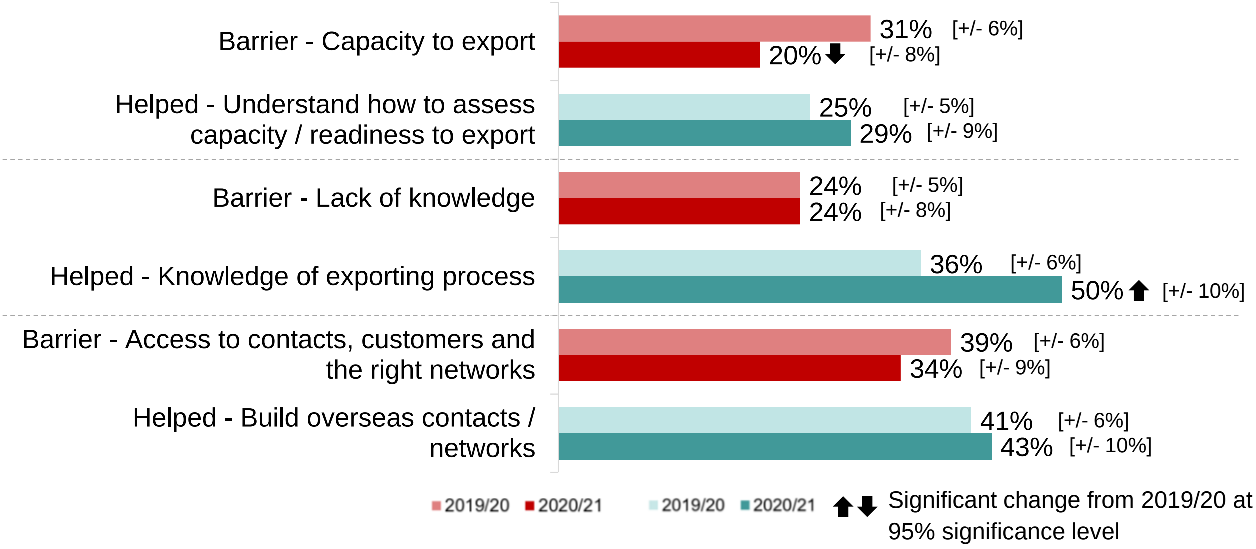


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export and Investment Teams (excluding 'not applicable' responses) (ranging from n=104 to n=107).

Businesses were asked whether using Export and Investment Teams (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Compared to the previous year, more businesses said Export and Investment Teams had helped to increase their knowledge of the exporting process (50% compared to 36% in 2019/20). Businesses also reported that using Export and Investment Teams helped them to build overseas contacts or networks (43%), or to assess their capacity and readiness to export (29%); these findings were in line with the previous year.

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

Chart 3.2.6 Barriers to exporting and how DIT helped – Export and Investment Teams



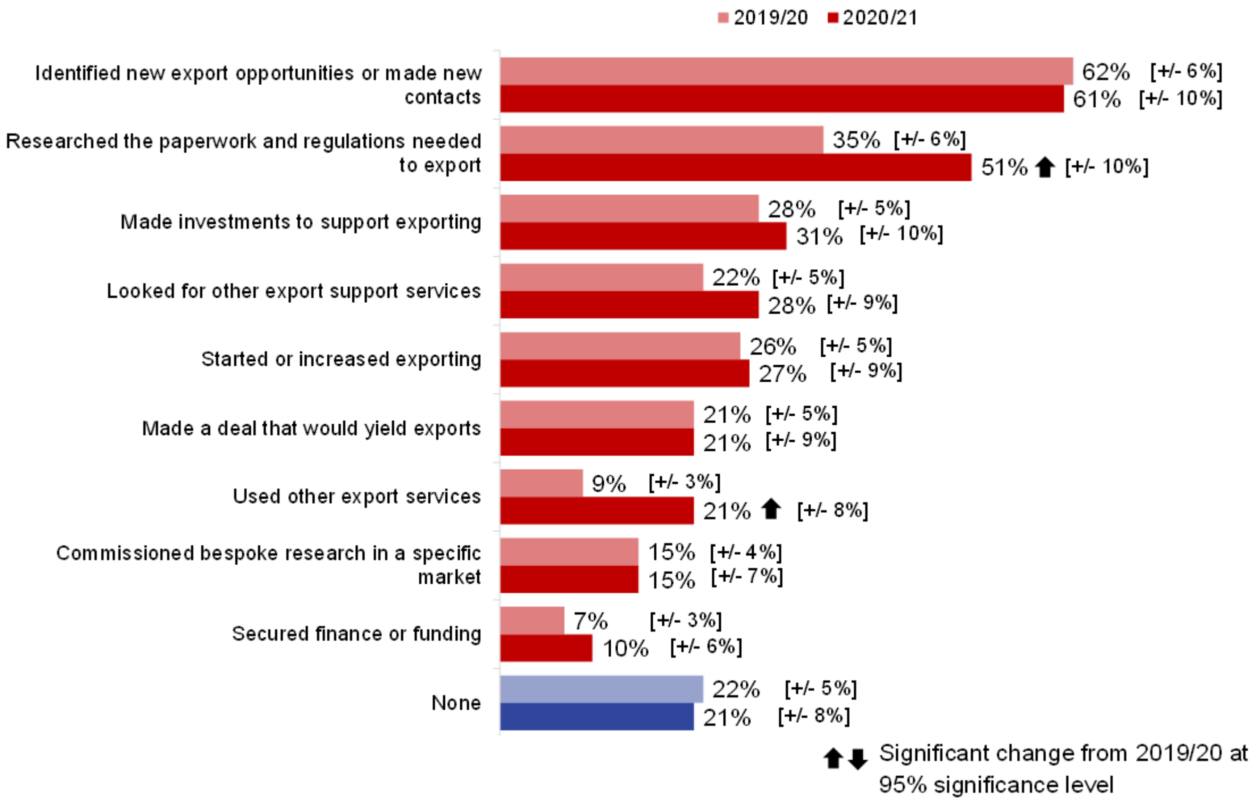
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export and Investment Teams (excluding 'not applicable' responses) (ranging from n=104 to n=107).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … Increase your knowledge of export opportunities available / build overseas contacts and networks? Base: All respondents who used Export and Investment Teams (n=113).

3.2.2.2 Taking action

Businesses had taken a range of actions as a result of using Export and Investment Teams. Around a third of businesses (35%) that were not exporting at the time of using the service, had assessed the company's readiness to export. Among all businesses, six in ten (61%) said they had identified new export opportunities or made new contacts, while half (51%) had researched the paperwork and regulations needed to export. Around three in ten users had made investments to support exporting (31%), looked for other export support services (28%) or had started or increased exporting (27%).

Overall, the proportion of businesses saying they had researched the paperwork and regulations needed to export increased compared to the previous year (51% compared to 35% in 2019/20), as did the proportion saying they had used other export services (21% compared to 9% in 2019/20).

Chart 3.2.7 Actions taken as a result of service interaction - Export and Investment Teams



Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Export and Investment Teams (n=113).

3.2.2.3 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 (73%), followed by making or expanding an export plan (51%), making a new or expanded business contract (44%) or selling directly to consumers in overseas markets (32%). These findings were in line with the previous year.

Among businesses that had identified a new business contact as part of the DIT service, four in ten (39%) had made contact with a distributor, while around three in ten had made contact with a buyer (33%) or an agent (30%).

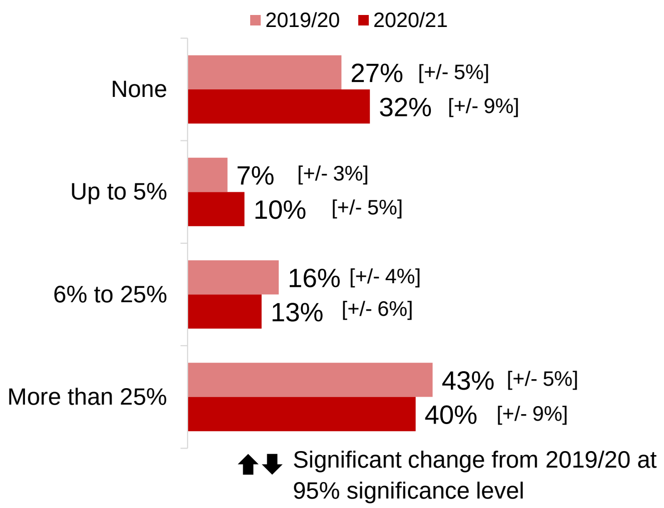
3.2.2.4 Making investments

Overall, a total of 47 businesses had invested in exporting after using the Export and Investment Teams service. Among these, 38 had increased their marketing and sales activity and 36 had made a Research and Development investment.

3.2.3. Service use by firmographics and export behaviour

Four in ten firms (40%) reported that more than a quarter of their turnover came from exporting. These findings were in line with the previous year.

Chart 3.2.8 Proportion of turnover from exporting

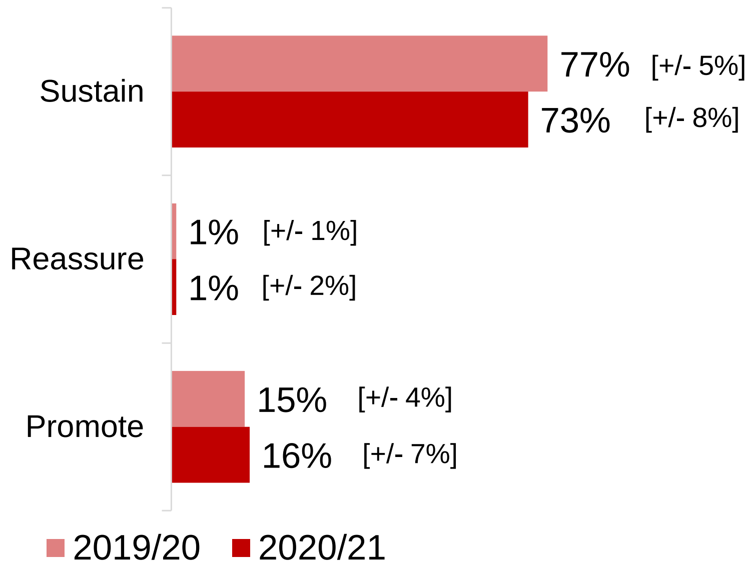


Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Export and Investment Teams (n=113).

Current exporters made up the majority of businesses using the Export and Investment Teams service. Seven in ten businesses (73%) were currently exporting ('Sustain'), although 16 percent had never exported before ('Promote'). Only one percent had exported before but not in the past 12 months ('Reassure')[21]. These findings remained in line with the previous year.

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

Chart 3.2.9 Exporter status

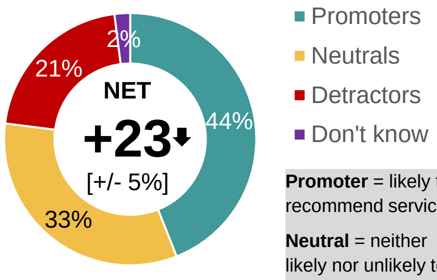


Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Export and Investment Teams (n=113).

Among the 36 businesses that were not already exporting whilst using the Export and Investment Teams service, 21 had plans to export in the next 12 months and six had plans to export further in the future; nine did not have any plans to export in the future.

Summary: Posts

Net Promoter Score



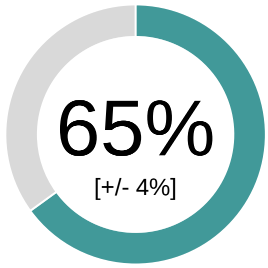
2019/20: +30
[+/- 5%]

Promoter = likely to recommend service

Neutral = neither likely nor unlikely to recommend service

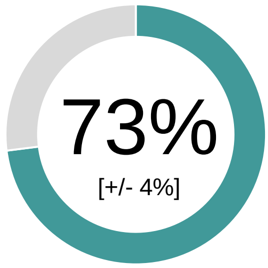
Detractor = unlikely to recommend service

Overall service met needs



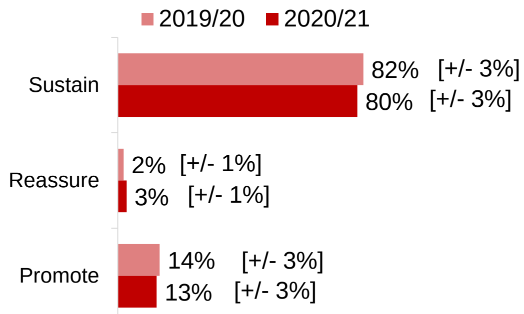
2019/20: 66%
[+/- 4%]

Satisfaction with service



2019/20: 76%
[+/- 4%]

Exporter status



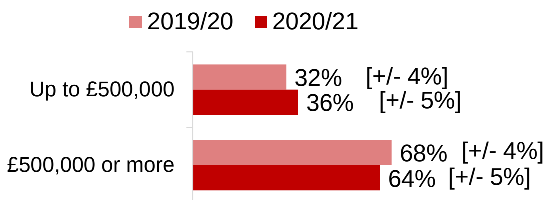
Sustain = current exporters

Reassure = exported before but not in the last 12 months

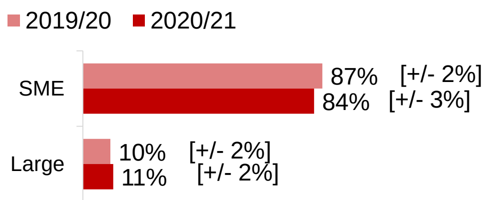
Promote = not exported before

⬆⬇
Significant change from 2019/20 at 95% significance level

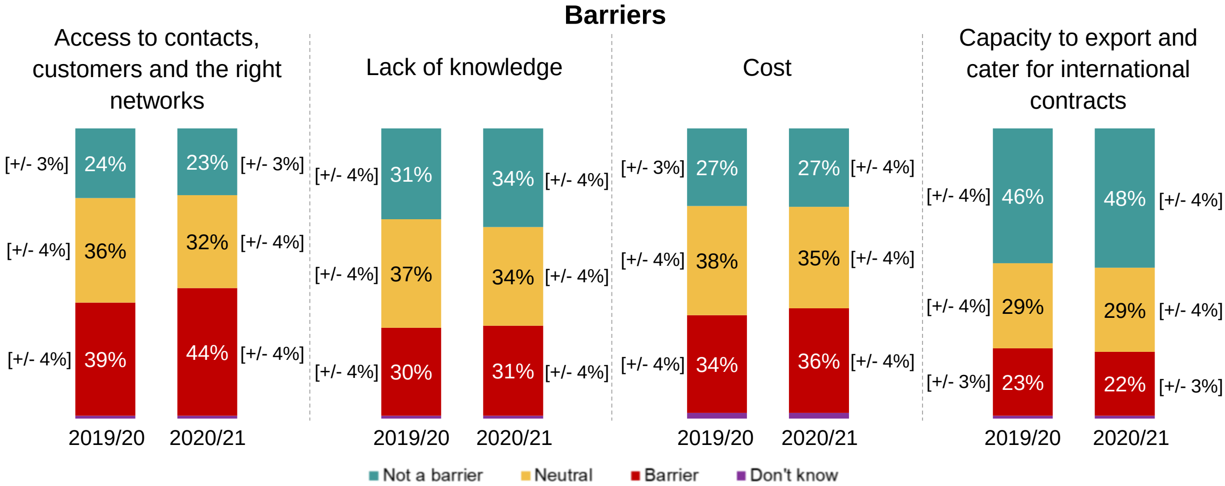
Turnover



Size



Barriers



3.3. Posts

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

This chapter explores satisfaction with the Posts service, actions taken as a result of using the service, and the exporting profile of service users. The findings are based on interviews with 622 businesses who used Posts between April 2020 and March 2021.

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

Key changes since 2019/20:

The NPS for Posts was +23, which was a decline compared to +30 in the previous year. A driver for this may have been year-on-year declines in the likelihood to recommend Posts in the Middle East and Asia Pacific, which decreased overall scores. Those who were dissatisfied felt that the service did not give them enough information or advice, did not do anything for them or did not help them.

However, more businesses were positive about staff knowledge (85% compared to 78% in 2019/20), and how clear they were on the steps that they needed to take, both when using the service (74% compared to 63% in 2019/20) and afterwards (63% compared to 56% in 2019/20). As a result of using the Posts service, more businesses said they had researched the paperwork or regulations needed to export (49% compared to 40% in 2019/20) or had looked for other export services (27% compared to 20% in 2019/20).

In addition, more businesses said that using Posts had helped them to overcome barriers to exporting, such as by building overseas contacts or networks (52% compared to 44% in 2019/20), increasing their knowledge of the exporting process (44% compared to 38% in 2019/20), or by assessing their capacity and readiness to export (31% compared to 23% in 2019/20).

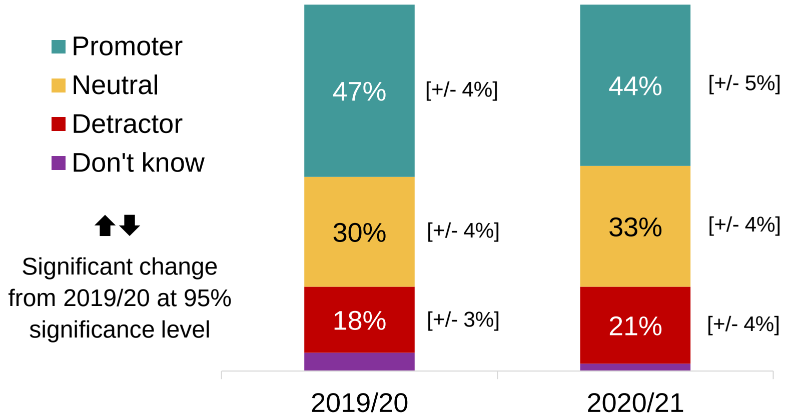
There were some differences in the exporting status of businesses that had used the Posts service compared to the previous year. In 2020/21, fewer users exported to non-EU European countries (53% compared to 60% in 2019/20) or Africa (39% compared to 46% in 2019/20). There was also an increase in the proportion of non-exporters that said they had no plans to export in the future (14% compared to 6% in 2019/20).

3.3.1. Satisfaction with the Posts service

3.3.1.1 Service performance

Businesses gave a mixed response as to whether they would recommend the Posts service to colleagues and business associates. Around four in ten users (44%) were 'Promoters', i.e. likely to recommend the service, and one in five (21%) were 'Detractors', i.e. unlikely to recommend the service[22]. These individual findings were in line with the previous year, although the Net Promoter Score (‘Promoters’ minus ‘Detractors’) was lower in 2020/21 (+23 compared to +30 in 2019/20).

Chart 3.3.1 Likelihood of recommending service (NPS) – Posts



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Posts (n=622).

The likelihood of recommending this service varied by region. Businesses dealing with the Middle East (NPS of 12) were less likely to promote the service than businesses trading with other regions, in particular compared to businesses dealing with Eastern Europe and Central Asia (NPS of 32) and Europe (NPS of 28). Businesses dealing with both the Middle East and Asia Pacific (NPS of 15) were less likely to promote the service compared to the previous year (NPS of 29 and 36 respectively in 2019/20). This is shown in Table 3.3.1 below.

[22] 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 3.3.1 Net Promoter Score for service by HMTC region

	2019/20			2020/21			
	NPS	**CI (+/-)**	**Base**	**NPS**	**CI (+/-)**	**Base**	**Change**
Overall	30	5%	765	23	5%	622	↓
Europe	27	10%	284	28	10%	281	-
Eastern Europe and Central Asia	38	17%	100	32	22%	51*	-
Middle East	29	20%	88*	12	19%	105	↓
Asia Pacific	36	20%	72*	15	20%	59*	↓
Latin America and Caribbean	34	21%	59*	17	22%	74*	-
North America	34	22%	51*	21	25%	27*	-
Africa	10	30%	50*	47	28%	24*	
South Asia	27	64%	6*	-	-	0	-

*Small base size – interpret with caution
↑↓ Significant change from 2019/20 at 95% significance level

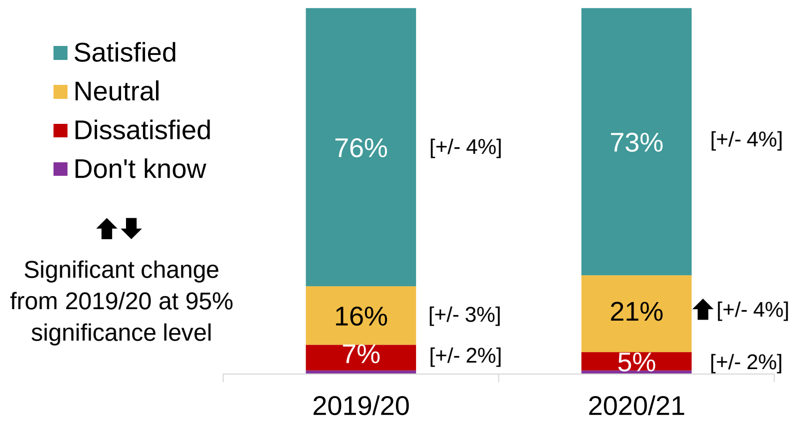
Businesses felt that the service **could be improved** by having support that was more tailored or relevant to their industry or sector (17%). Just under one in ten suggested the service could have offered more feedback, follow up or aftercare (8%), or could have offered more information, advice or guidance (7%). More than four in ten businesses (43%) could not think of any ways in which the service could be improved[23].

3.3.1.2 Satisfaction

Almost three-quarters of users (73%) were satisfied with their overall experience of using the Posts service, while five percent were dissatisfied. These figures were in line with the previous year, however more respondents in 2020/21 gave neutral ratings (21% compared to 16% in 2019/20)[24].

[23] When asked how the service could be improved, 32% said Don't know, 9% said Nothing, no improvement needed or the service was fine as it is, and 2% had no answer or no comment.
[24] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

Chart 3.3.2 Satisfaction with service - Posts



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Posts (excluding 'not applicable' responses) (n=616).

Satisfaction also varied by region. Businesses dealing with Africa were most satisfied (90%), followed by those dealing with North America (81%), and Eastern Europe and Central Asia (78%). This is shown in Table 3.3.2.

Table 3.3.2 Satisfaction with service by HMTC region

	2019/20			2020/21			
	Satisfied	**CI (+/-)**	**Base**	**Satisfied**	**CI (+/-)**	**Base**	**Change**
Overall	76%	4%	725	73%	4%	616	-
Europe	76%	6%	269	73%	6%	278	-
Eastern Europe and Central Asia	84%	9%	93*	78%	13%	51*	-
Middle East	71%	14%	86*	65%	11%	105	-
Asia Pacific	77%	13%	67*	73%	12%	57*	-
Latin America and Caribbean	78%	12%	58*	70%	12%	74*	-
North America	80%	12%	48*	81%	17%	26*	-
Africa	68%	16%	48*	90%	13%	24*	-
South Asia	64%	33%	6*	-	-	0	-

*Small base size – interpret with caution
↑↓ Significant change from 2019/20 at 95% significance level

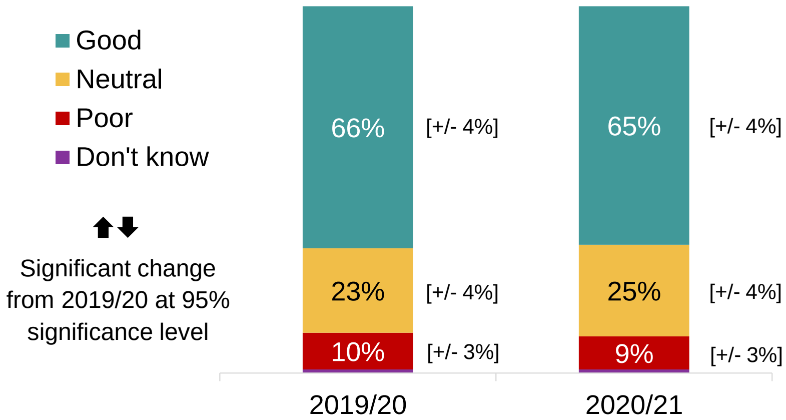
Of the 48 businesses that were dissatisfied with the service (i.e. they rated the service as poor), 23 reported that their **reason for dissatisfaction** was because the service did not give them enough information or advice, and 21 reported that the service did not do anything for them or did not help them.

3.3.1.3 Whether overall service met needs

Businesses were positive that the Posts service had met their needs; around two-thirds (65%) rated it as good, and one in ten (9%) rated it as poor[25]. These findings were in line with the previous year.

More established businesses were more likely to say that the service had met their needs; seven in ten (71%) of those that had been trading for more than ten years rated it as good, compared to 58% of those that had started trading more recently.

Chart 3.3.3 Rating of whether overall service met needs – Posts



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Posts (excluding 'not applicable' responses) (n=605).

Businesses were most positive about staff knowledge (85%), followed by the amount of time taken to receive information (75%), how comprehensive the information they received was (also 75%), and how clear they were on the steps that they needed to take when using the service (74%). They were least positive about how clear they were on the steps that needed to be taken after using the service (63%)[26]. Compared to the previous year, more businesses were positive about staff knowledge (85% compared to 78% in 2019/20) and how clear the steps were, both when using the service (74% compared to 63% in 2019/20) and afterwards (63% compared to 56% in 2019/20).

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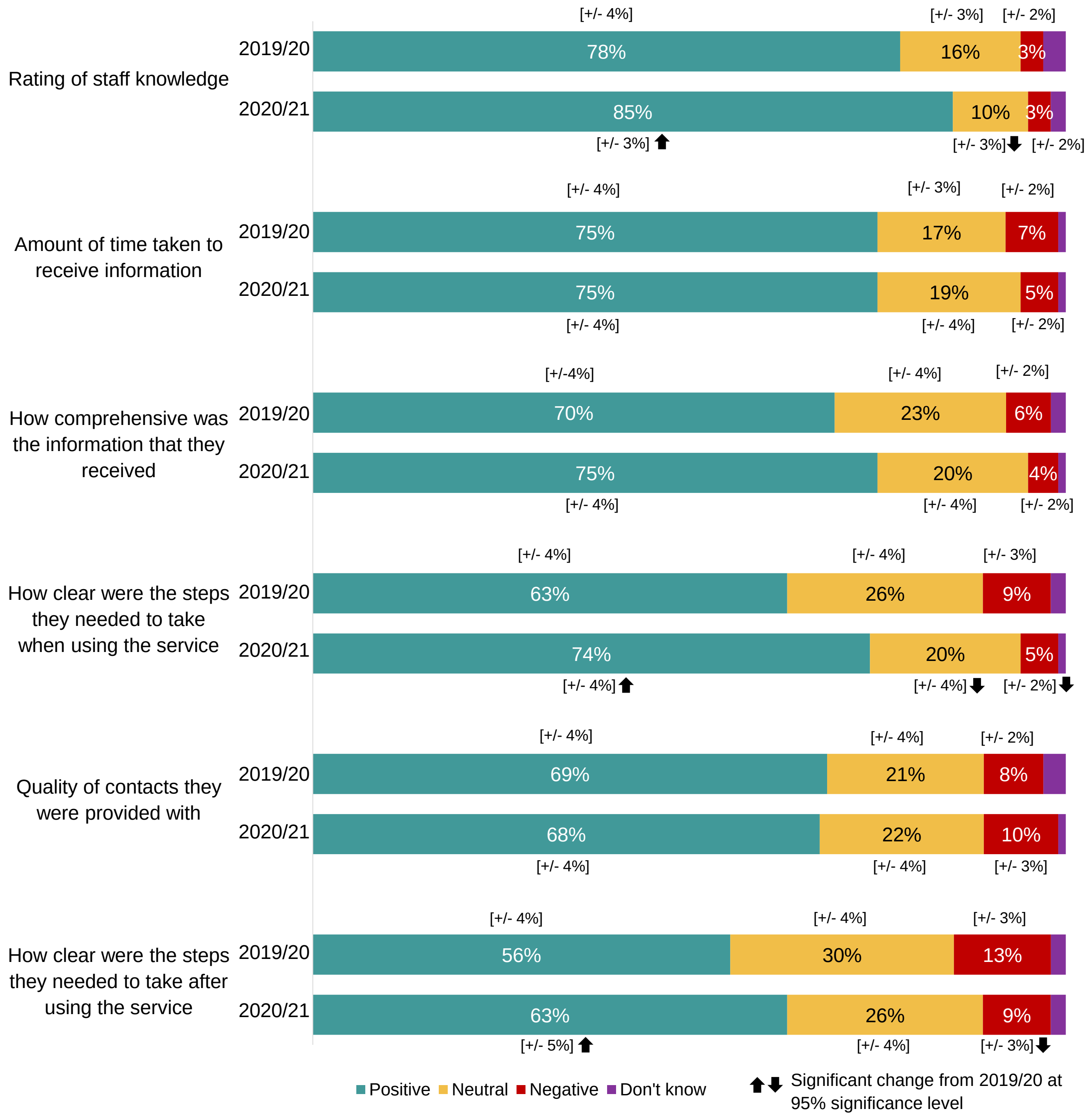
[25] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.
[26] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

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



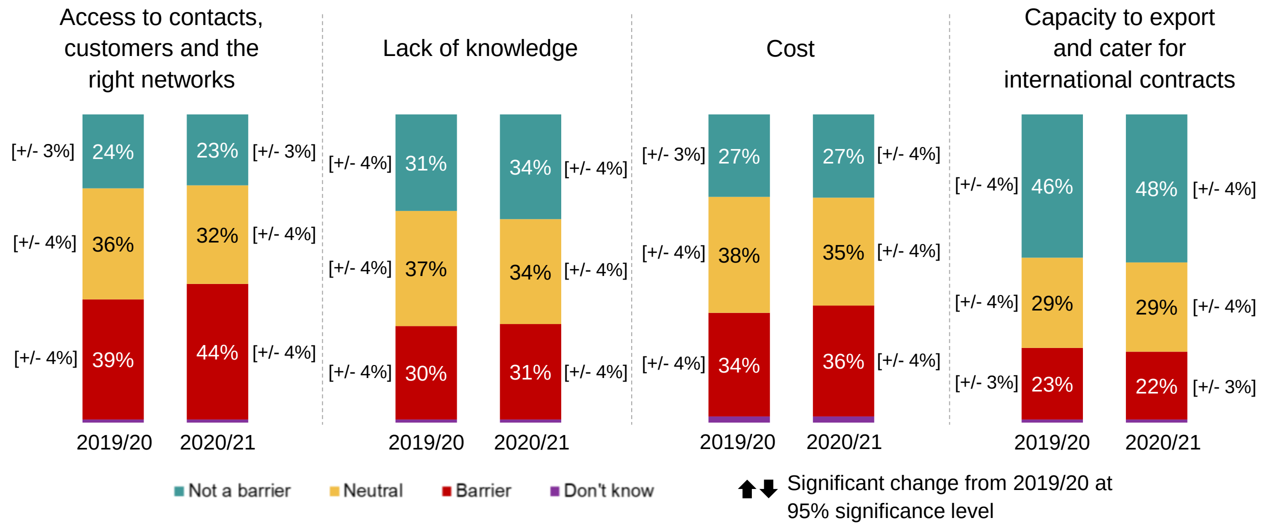
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=573). Qtimetaken – How acceptable was the time taken to receive the information or support you required from the service? (n=588). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=587). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=595). Qclarity_2 – The service made clear what I should do next after using it (n=583). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=555). Base: All respondents that used each service (excluding 'not applicable' responses).

3.3.2. Outcomes of using the Posts service

3.3.2.1 Counteracting the barriers to exporting

Businesses that used the Posts service reported facing barriers to exporting[27]. More than four in ten (44%) reported access to networks was a barrier, while just over a third (36%) saw cost as a barrier. Around three in ten (31%) felt that lack of knowledge was a barrier, while two in ten (22%) perceived capacity to export as a barrier. These findings were in line with the previous year.

Chart 3.3.5 Barriers to exporting – Posts



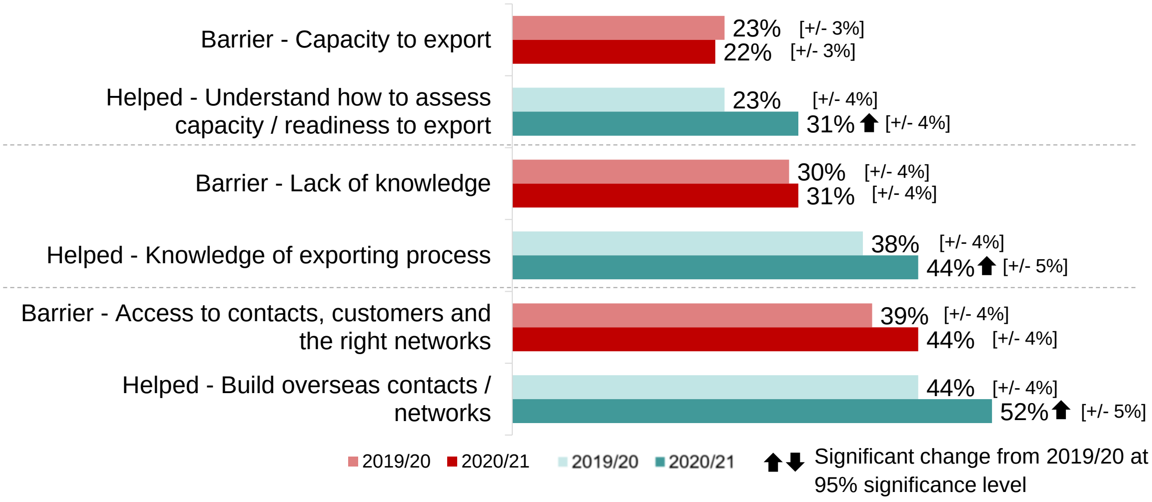
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Posts (excluding 'not applicable' responses) (ranging from n=593 to n=605).

Lack of knowledge was cited as a barrier by more micro businesses (37%) than small and medium businesses (23% and 22% respectively), and by more firms that had been trading for 1-5 years (45%) than firms that had been trading for more than 5 years (25%). Lack of access to networks was more likely to be perceived as a barrier by firms with lower turnovers; over half (53%) of those whose turnover was less than £500,000 said this was a barrier (compared to 42% of those with a turnover of £500,000 or more). Similarly, more firms that had been trading for 1-5 years (55%) reported this as a barrier, compared to 41% of firms that had been trading for more than 5 years.

Businesses were asked whether using Posts (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Compared to the previous year, more businesses in 2020/21 felt that using this service had helped them to overcome the barriers to exporting. More businesses reported that using Posts had helped them to build overseas contacts or networks (52% compared to 44% in 2019/20), increased their knowledge of the exporting process (44% compared to 38% in 2019/20) or helped them to assess their capacity and readiness to export (31% compared to 23% in 2019/20).

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

Chart 3.3.6 Barriers to exporting and how DIT helped – Posts



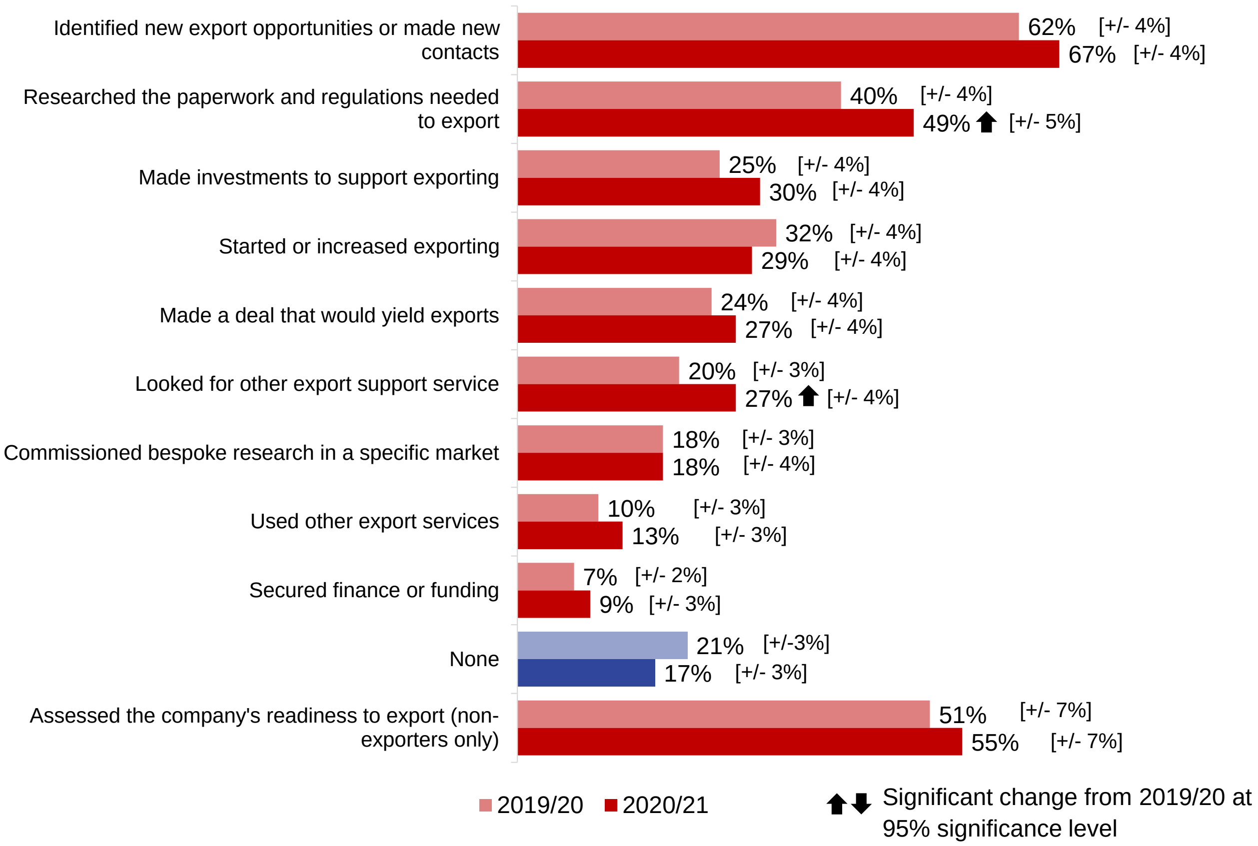
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Posts (excluding 'not applicable' responses) (ranging from n=593 to n=605).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the exporting process / understand how to assess your own business capacity or readiness to export / build overseas contacts and networks? Base: All respondents who used Posts (n=622).

3.3.2.2 Taking action

Businesses had taken a range of actions after using the Posts service. More than half of businesses (55%) that were not exporting at the time of using the service had assessed the company's readiness to export, and this was in line with the previous year. Among all businesses, two-thirds (67%) said they had identified new export opportunities or made new contacts. Around half (49%) had researched the paperwork and regulations needed to export. This was followed by making investments to support exporting (30%) and starting or increasing exporting (29%).

Overall, the proportion of businesses saying they had researched the paperwork and regulations needed to export increased compared to the previous year (49% compared to 40% in 2019/20), as did the proportion saying they had looked for other export support services (27% compared to 20% in 2019/20).

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

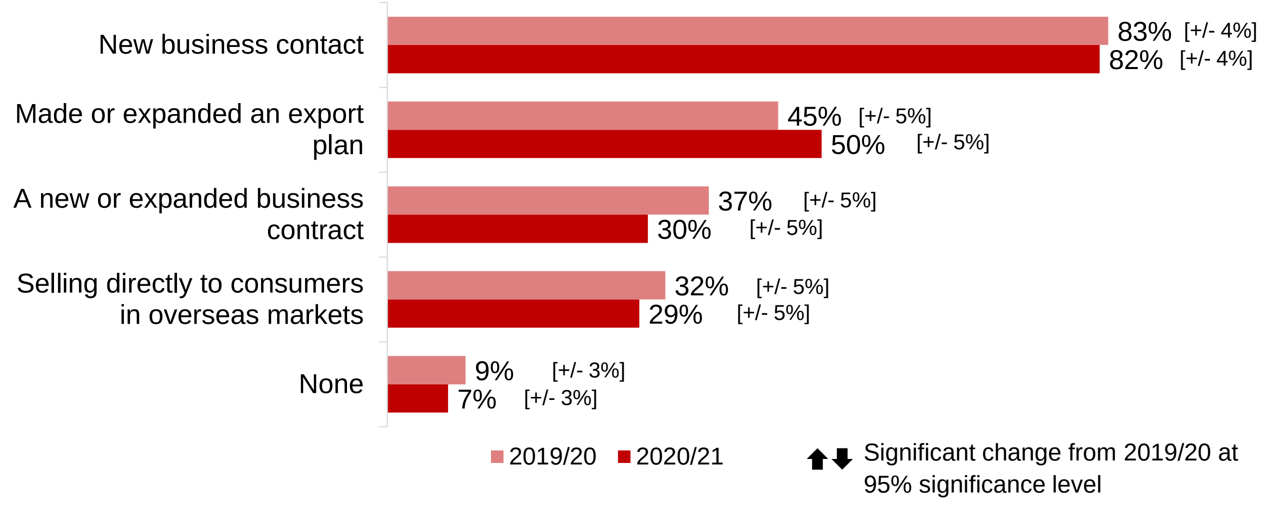


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Posts (n=622); Non-exporters (n=124).

3.3.2.3 Identifying new opportunities

As a result of using the Posts service, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (82%), followed by making or expanding an export plan (50%), making a new or expanded business contract (30%) or selling directly to consumers in overseas markets (29%). These findings were in line with the previous year.

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



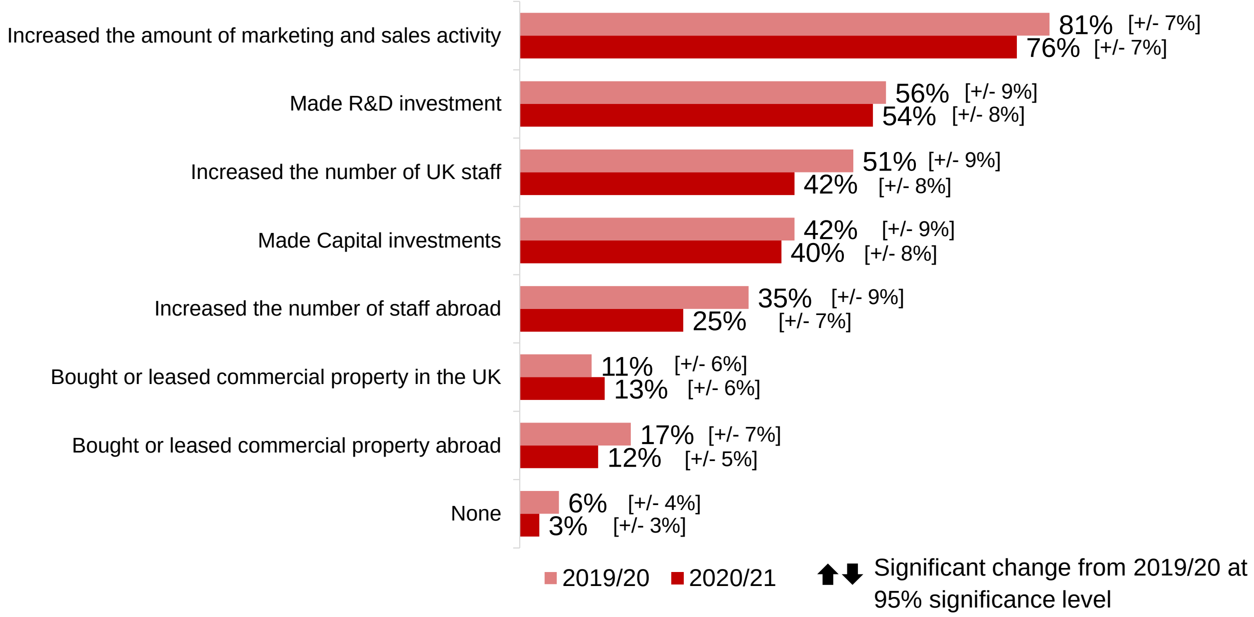
Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used Posts who had identified a new business contact as part of the DIT service (n=447).

Among businesses that had identified a new business contact as part of the DIT service, half (49%) had made contact with a buyer and slightly fewer (43%) had made contact with a distributor.

3.3.2.4 Making investments

Using the Posts service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the Posts service (30% overall), around three-quarters (76%) said they had increased their marketing and sales activity, while just over half made a Research and Development investment (54%). Around two in five increased the number of UK staff (42%) or made capital investments (40%). These findings remain unchanged compared to the previous year.

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

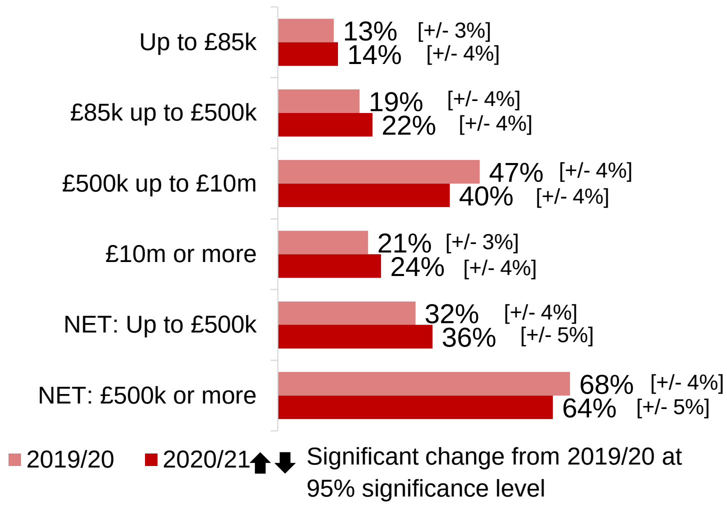


Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Only answers given by more than 3% of respondents are shown. Base: All respondents who had used Posts and had made investments to support exporting (n=177).

3.3.3. Service use by firmographics and export behaviour

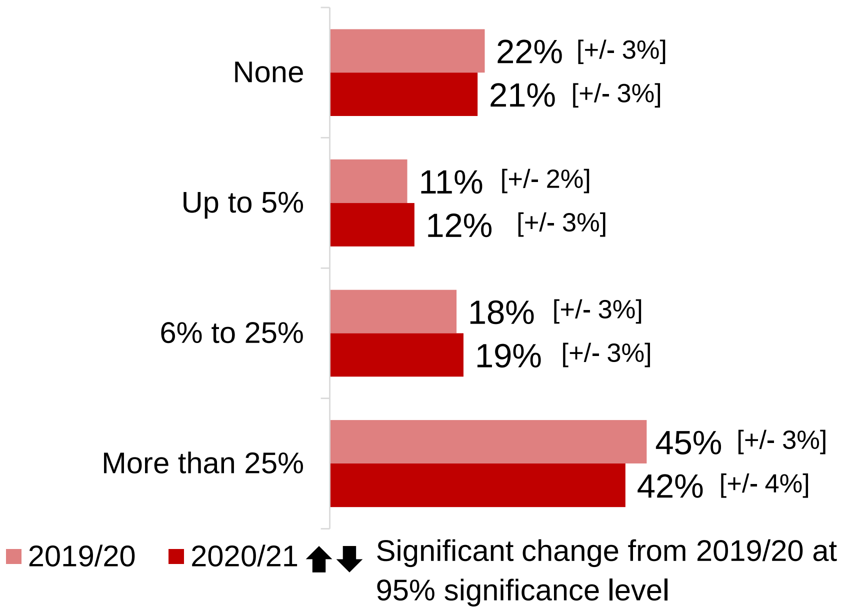
Posts service use was more common among businesses with high turnovers of £500,000 or more (64%) compared to businesses with lower turnovers (36%), in line with the previous year. Around two in five businesses (42%) reported that more than a quarter of their turnover came from exporting.

Chart 3.3.10 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used Posts (excluding Don't know/Refused) (n=456).

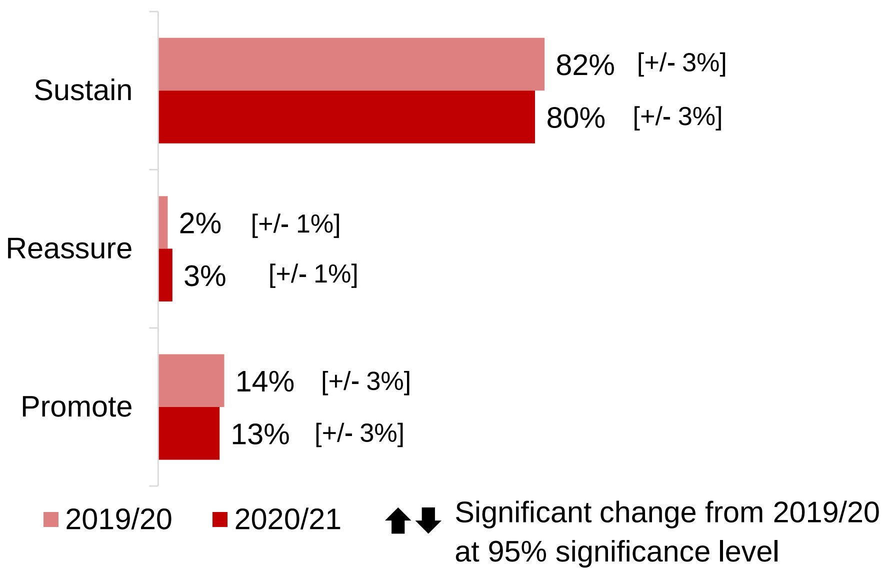
Chart 3.3.11 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Posts (n=622).

Current exporters made up the majority of businesses using the Posts service. Eight in ten businesses (80%) were currently exporting ('Sustain'), although 13 percent had never exported before ('Promote'). Only three percent had exported before but not in the past 12 months ('Reassure')[28]. This remained in line with the previous year.

Chart 3.3.12 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Posts (n=622).

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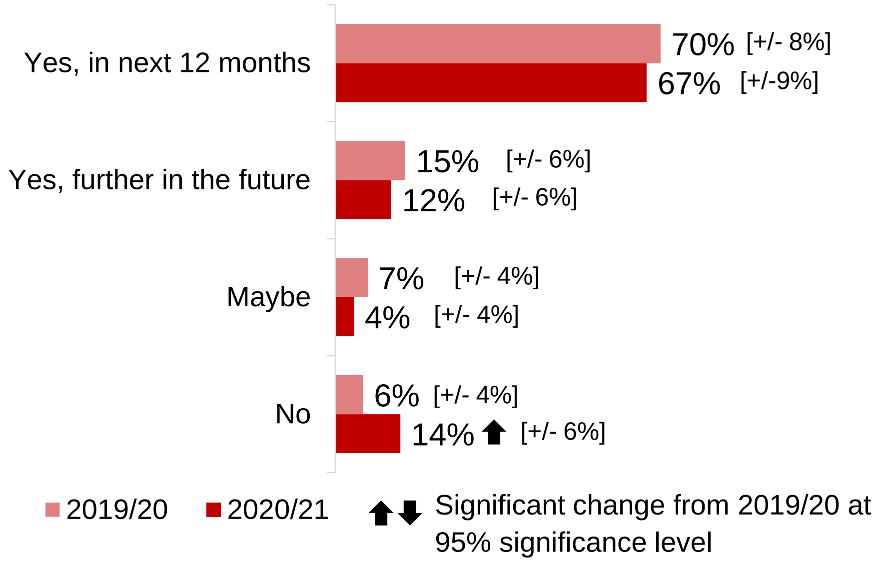
[28] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

Most former exporters using the Posts service had plans to export again. Two-thirds (67%) of those that were not currently exporting (but had done so previously) reported planning to export in the next twelve months. This was in line with the previous year, although more businesses said they were not planning to export in 2020/21 (14% compared to 6% in 2019/20).

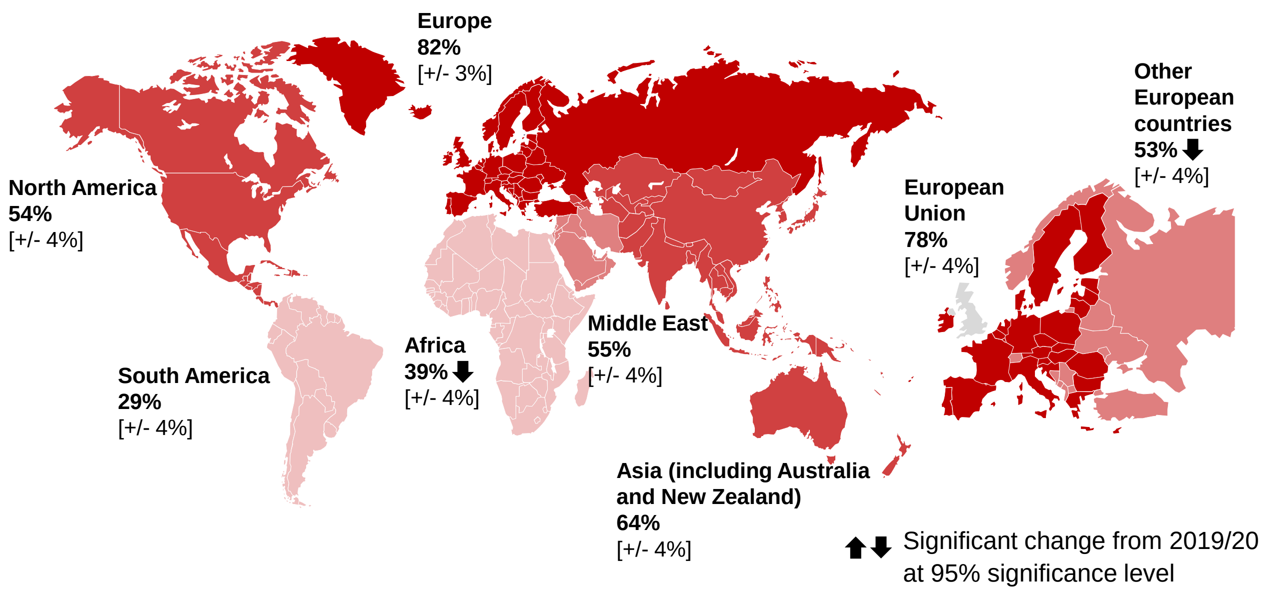
Chart 3.3.13 Non-exporter plans to sell overseas



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All respondents who used Posts and who are not currently exporting but have previously sold goods or services overseas (n=123).

Europe remained the most common export market among Posts users (82%). Among those who were currently exporting or had done so previously, around eight in ten (78%) exported to the European Union, followed by Asia (64%), the Middle East (55%), North America (54%), non-EU European countries (53%, down from 60% in 2019/20) and Africa (39%, down from 46%).

Chart 3.3.14 Regions organisations export to or exported to previously – Posts



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Posts and who have exported (n=524).

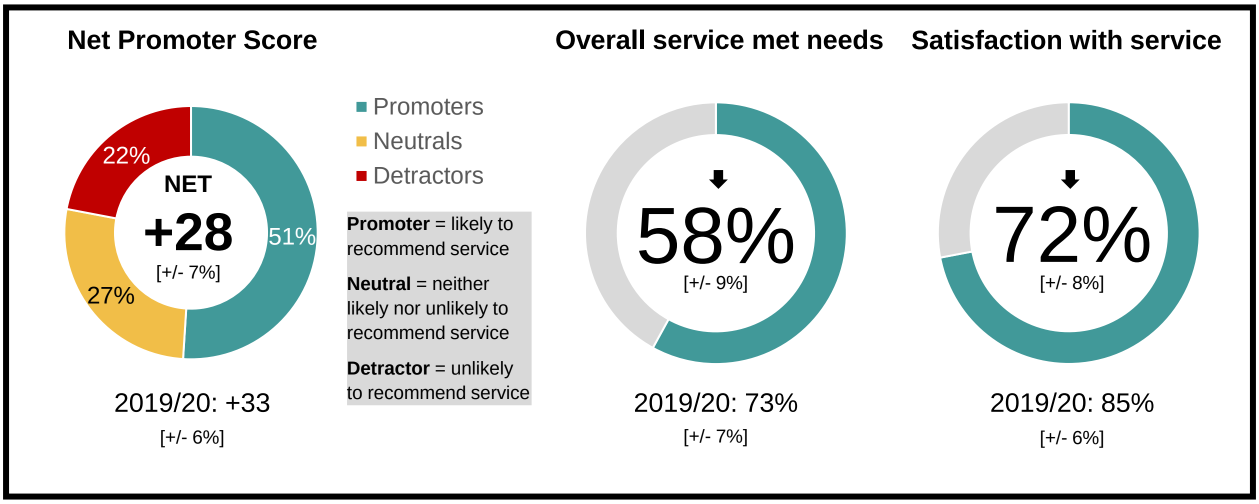
Table 3.3.3 Regions organisations export to or exported to previously – Posts

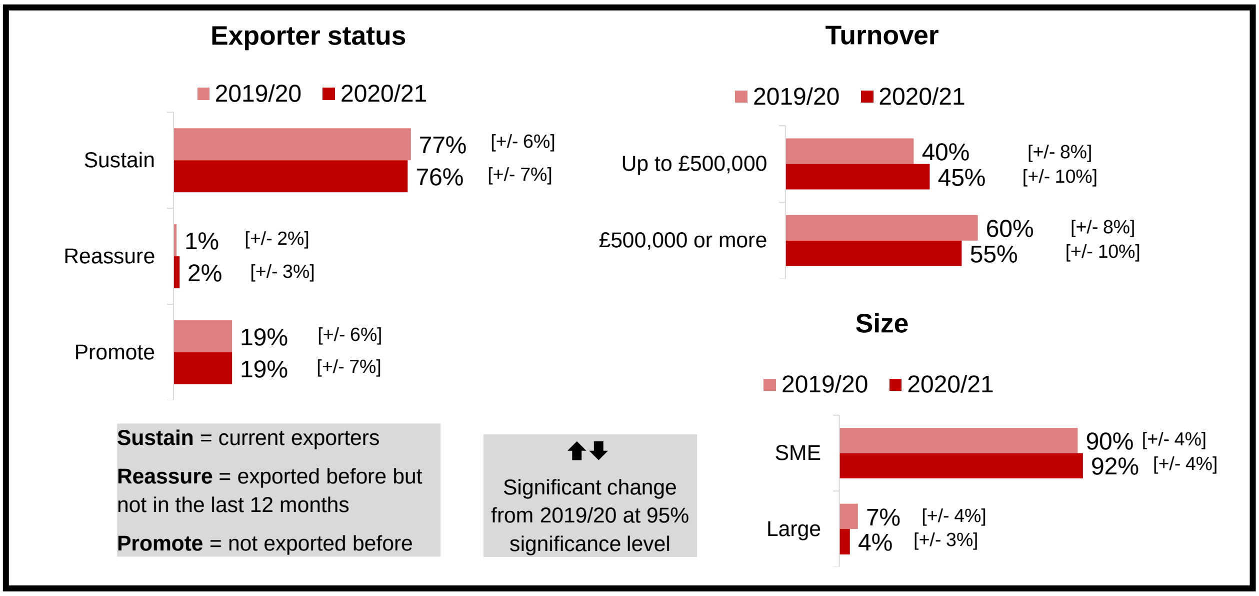
	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	85%	3%	82%	3%	-
European Union	80%	3%	78%	4%	-
Other European countries	60%	4%	53%	4%	↓
Asia (including Australia and New Zealand)	68%	4%	64%	4%	-
Middle East	59%	4%	55%	4%	-
North America	56%	4%	54%	4%	-
Africa	46%	4%	39%	4%	↓
South America	34%	4%	29%	4%	-

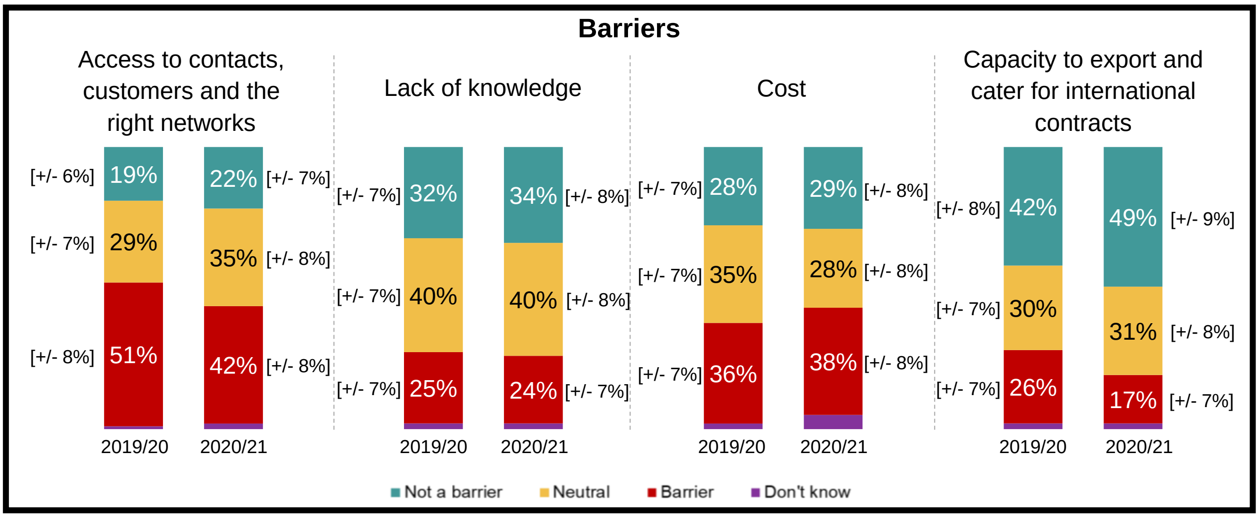
↑↓ Significant change from 2019/20 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Posts and who have exported (n=524).

Summary: Missions







3.4. 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 service users. The findings are based on interviews with 143 businesses who used Missions between April 2020 and March 2021.

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

Key changes since 2019/20:

The NPS for Missions was +28, which was in line with +33 in the previous year.

Satisfaction with Missions declined this year (72% compared to 85% in 2019/20), and users were also less likely to say that the service had met their needs (58% compared to 73% in 2019/20). This can be explained by declines in the proportion of businesses that were positive about the quality of contacts they were provided with (61% compared to 76% in 2019/20), which might be expected given the impact of the COVID-19 pandemic.

However, as a result of using the service, more businesses said they had made a deal that would yield exports (29% compared to 16% in 2019/20).

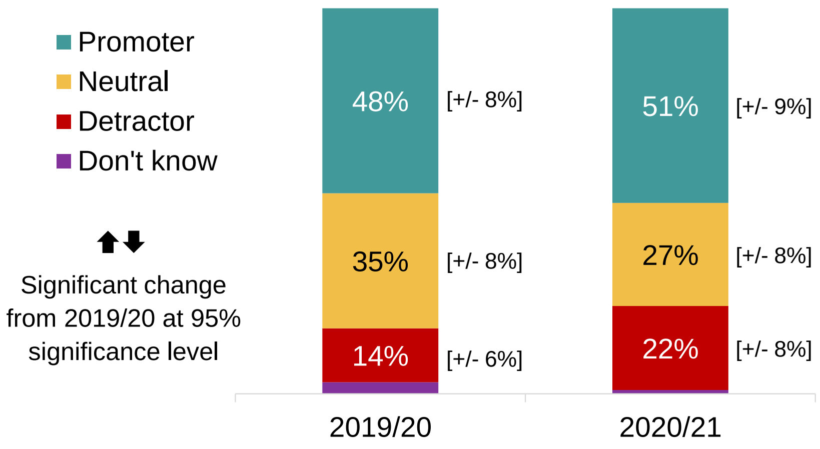
3.4.1. Satisfaction with the Missions service

3.4.1.1 Service performance

Businesses were positive about the Missions service, and many said they would recommend it to colleagues and business associates. Half of users (51%) were 'Promoters', i.e. likely to recommend the service, and one in five (22%) were 'Detractors', i.e. unlikely to recommend the service[29]. These findings were in line with the previous year.

[29] 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 3.4.1 Likelihood of recommending service (NPS) – Missions



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Missions (n=143).

Businesses felt that the service **could be improved** by having support that was more tailored or relevant to their industry or sector (21%). Around one in ten suggested the service could provide better networking opportunities or higher quality leads (14%) or could have offered more follow-up or feedback after using the service (9%). A quarter of businesses (24%) could not think of any ways in which the service could be improved[30].

3.4.1.2 Satisfaction

Satisfaction with Missions remained relatively high, but lower than in the previous year. Seven in ten respondents (72%) said they were satisfied with their experience (compared to 85% in 2019/20), and seven percent said they were dissatisfied (compared to 1% in 2019/20)[31].

Of the eleven business that were dissatisfied with the service (i.e. they rated the service as poor), six reported that their **reason for dissatisfaction** was feeling that the service did not do anything for them or did not help them, and six reported that the service provided them with poor quality contacts.

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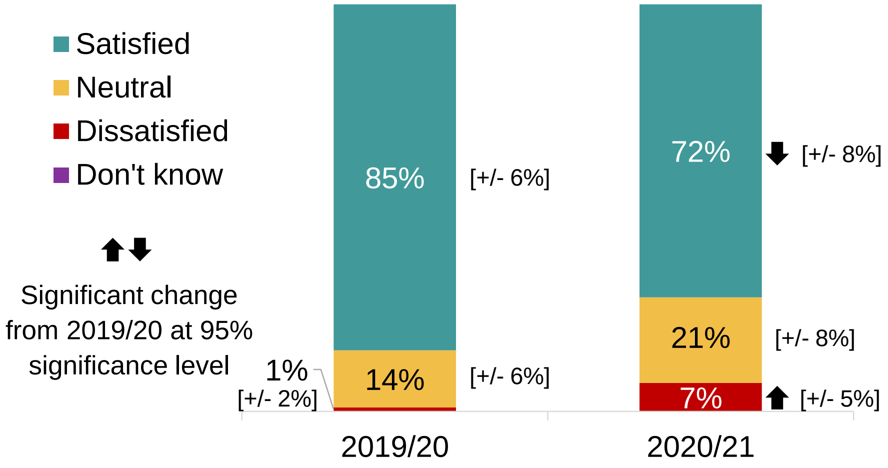
[30] When asked how the service could be improved, 20% said Don't know, 4% said Nothing, no improvement needed or the service was fine as it is, and fewer than 1% had no answer or no comment.
[31] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

Chart 3.4.2 Satisfaction with service - Missions

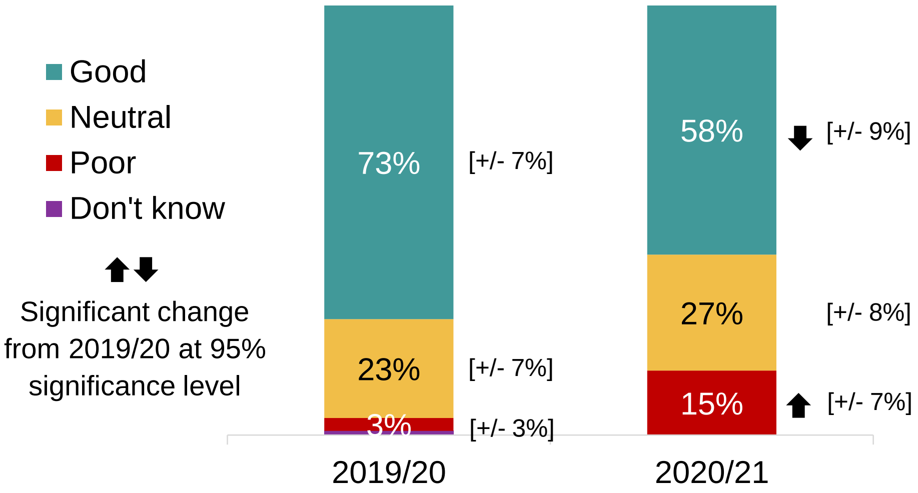


Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Missions (excluding 'not applicable' responses) (n=141).

3.4.1.3 Whether overall service met needs

Compared to the previous year, businesses were less likely to say that the overall Missions service had met their needs; six in ten (58%) rated it as good (compared to 73% in 2019/20), while more than one in ten (15%) rated it as poor (compared to 3% in 2019/20)[32].

Chart 3.4.3 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 respondents who used Missions (excluding 'not applicable' responses) (n=138).

Businesses were most positive about the amount of time taken to receive information (87%) and staff knowledge (86%), as well as the clarity of the steps they needed to take when using the service (83%). These findings were in line with the previous year (2019/20). Businesses were least positive about the quality of contacts they were provided with (61%), and this was lower than in the previous year (76% in 2019/20)[33].

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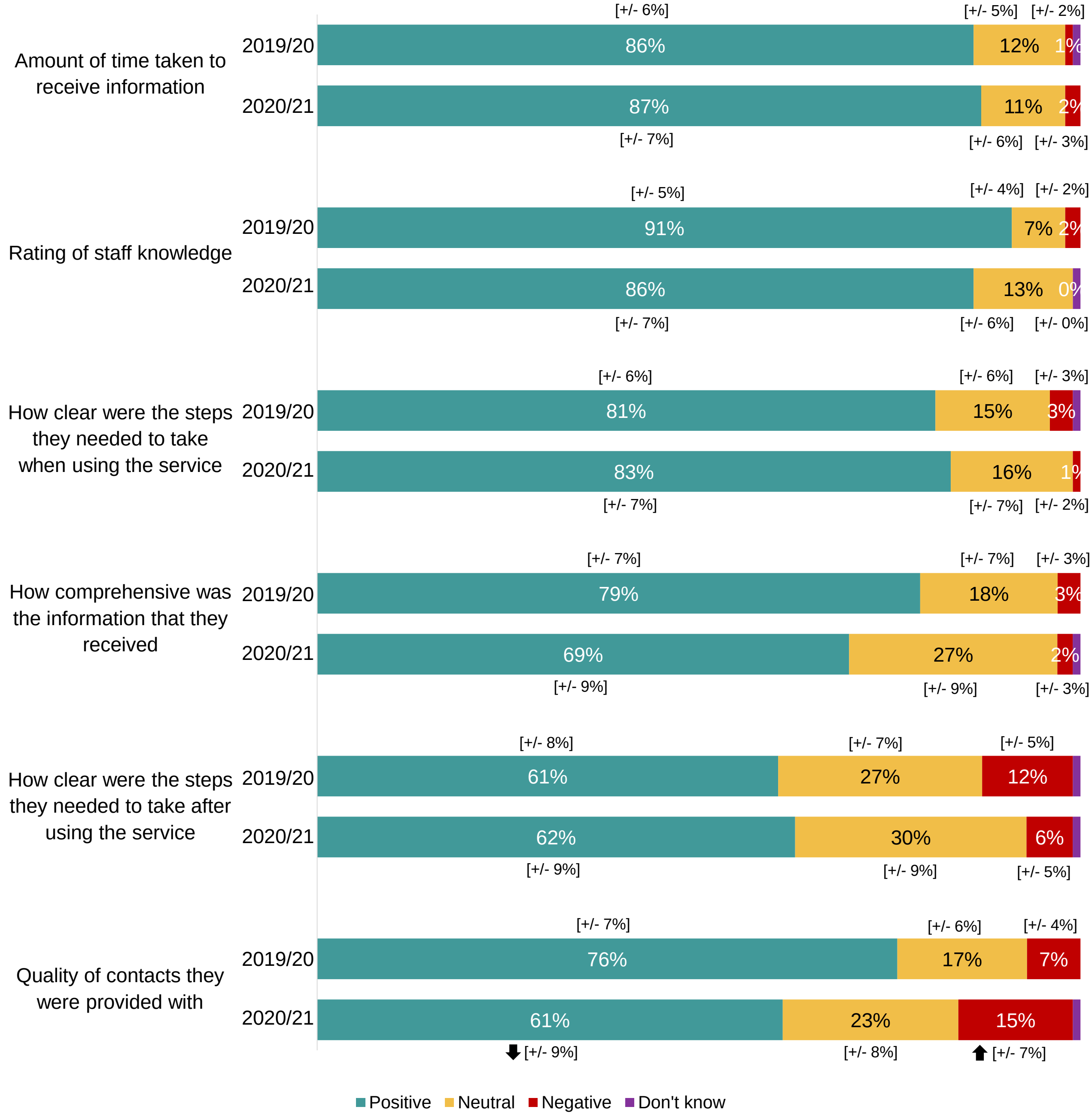
[32] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.
[33] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

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



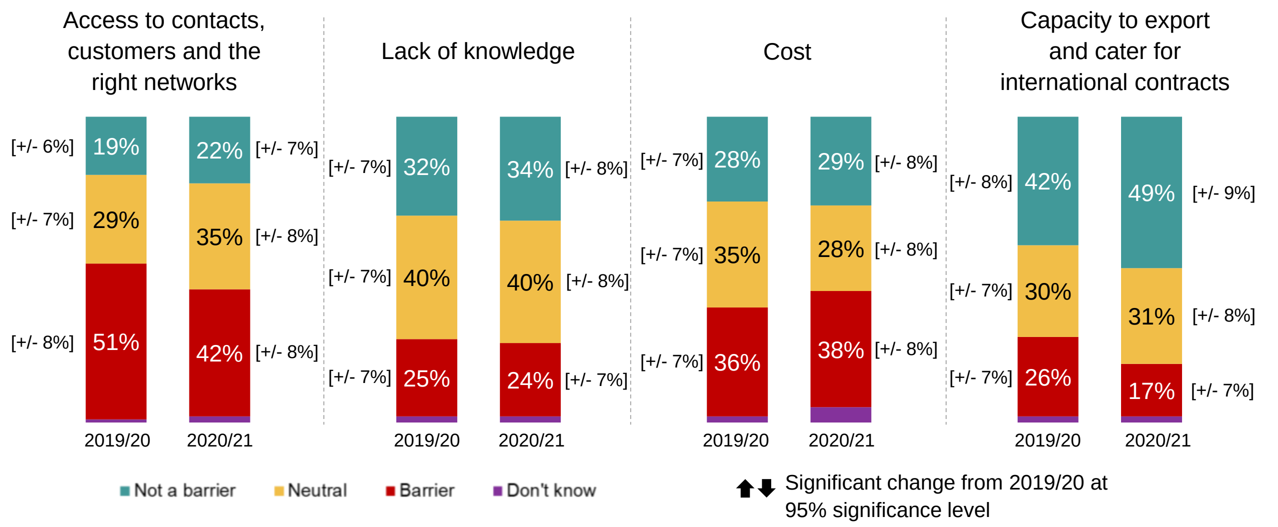
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=135). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=133). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=137). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=137). Qclarity_2 – The service made clear what I should do next after using it (n=135). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=136). Base: All respondents that used each service (excluding 'not applicable' responses).

3.4.2. Outcomes of using the Missions service

3.4.2.1 Counteracting the barriers to exporting

Businesses that had used the Missions service reported facing barriers to exporting[34]. Four in ten (42%) reported access to networks as a barrier, and a similar proportion (38%) said that cost was a barrier. Users were less likely to perceive lack of knowledge (24%) or capacity to export (17%) as barriers. These findings were in line with the previous year.

Chart 3.5 Barriers to exporting – Missions

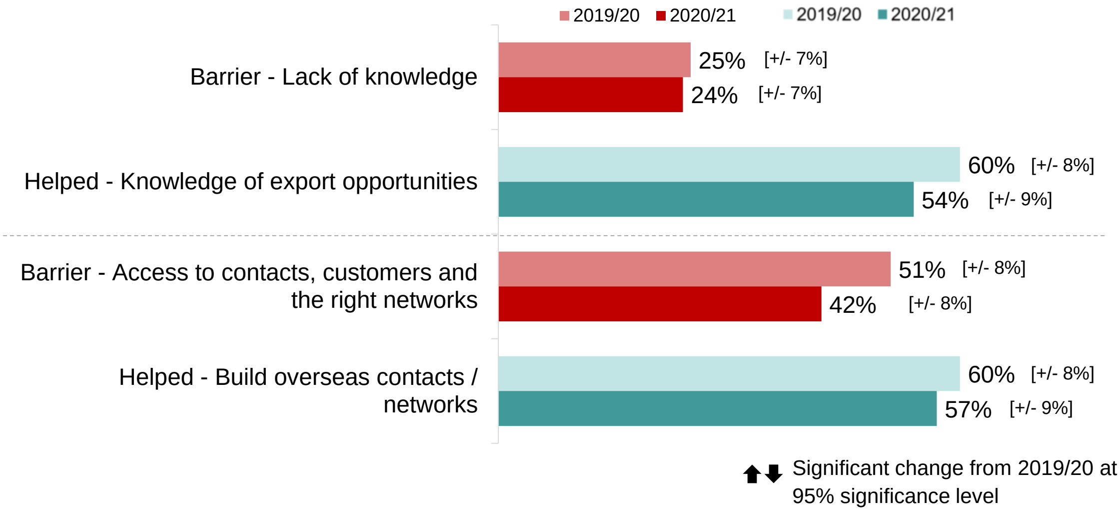


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Missions (excluding 'not applicable' responses) (ranging from n=140 to n=142).

Businesses were asked whether using Missions (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using Missions had helped them to build overseas contacts or networks (57%) and increase their knowledge of exporting opportunities that were available (54%). These findings were in line with the previous year.

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

Chart 3.4.6 Barriers to exporting and how DIT helped – Missions



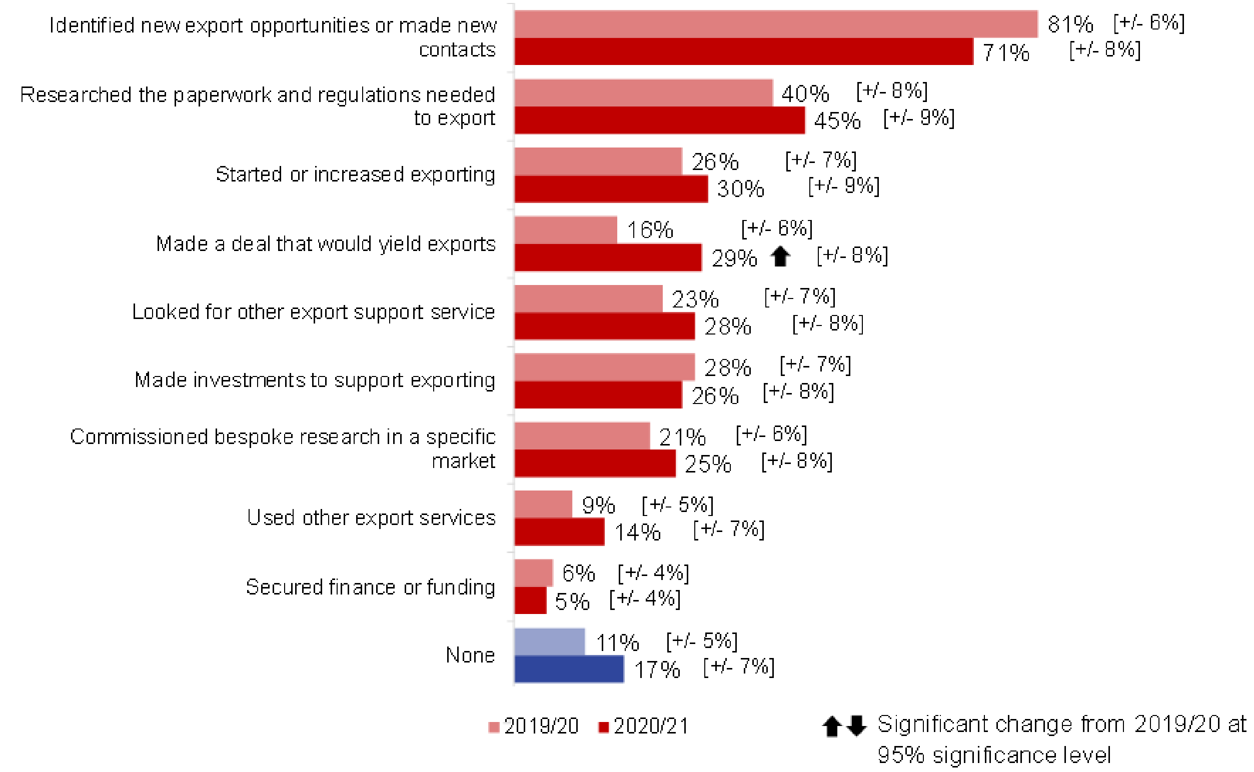
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Missions (excluding 'not applicable' responses) (n=143).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … Increase your knowledge of export opportunities available / build overseas contacts and networks? Base: All respondents who used Missions (n=143).

3.4.2.2 Taking action

Businesses had taken a range of actions as a result of using Missions. Six in ten businesses (58%) that were not exporting at the time of using the service, had assessed the company's readiness to export. Among all businesses, seven in ten (71%) said they had identified new export opportunities or made new contacts, while just under half (45%) had researched the paperwork and regulations needed to export. Around three in ten had started or increased exporting (30%), had made a deal that would yield exports (29%) or had looked for other export support services (28%).

Overall, the proportion of businesses saying they had made a deal that would yield exports increased compared to the previous year (29% compared to 16% in 2019/20). No other statistically significant differences were detected.

Chart 3.4.7 Actions taken as a result of service interaction - Missions

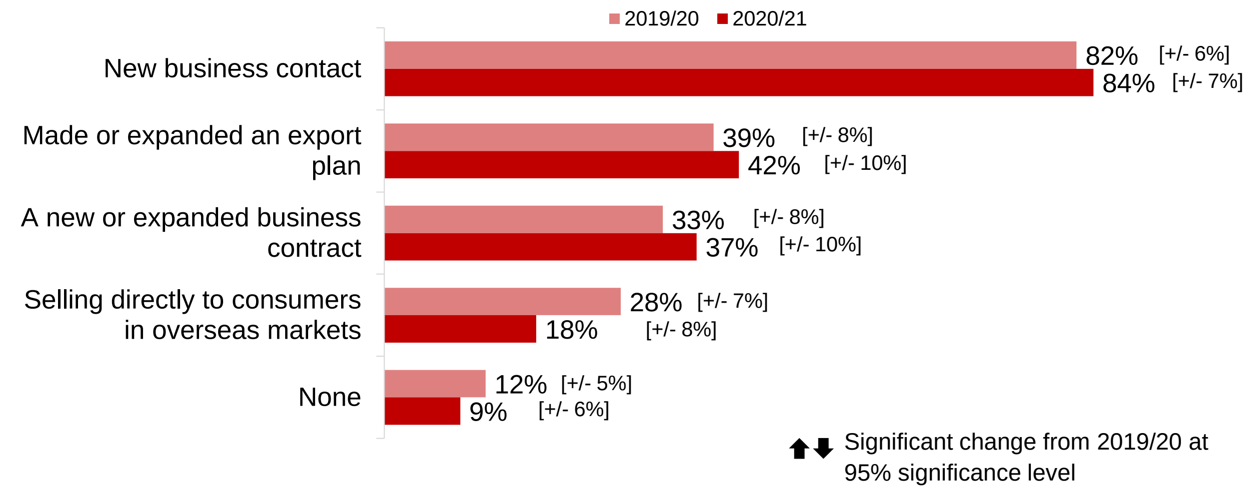


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Missions (n=143).

3.4.2.3 Identifying new opportunities

As a result of using Missions, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (84%), followed by making or expanding an export plan (42%), making a new or expanded business contract (37%) and selling directly to consumers in overseas markets (18%). These findings were in line with the previous year. No other statistically significant differences were detected.

Chart 3.4.8 Opportunities identified as a result of service interaction – Missions



Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used Missions who had identified a new business contact as part of the DIT service (n=117).

Among the 95 businesses that had identified a new business contact as part of the DIT service, half (50%) had made contact with a buyer and slightly fewer (42%) had made contact with a distributor.

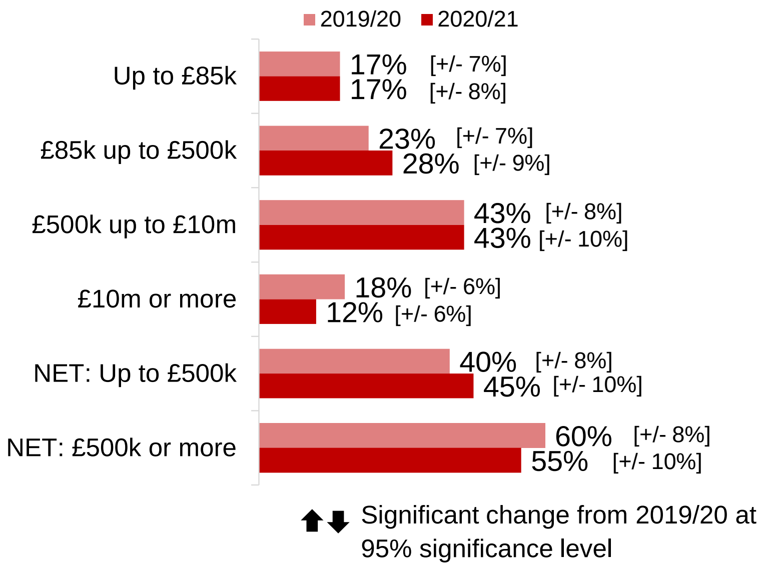
3.4.2.4 Making investments

Overall, a total of 41 businesses had invested in exporting after using the Missions service. Among these, 35 had made a Research and Development investment, 33 had increased their marketing and sales activity, 23 had increased the number of their UK staff.

3.4.3. Service use by firmographics and export behaviour

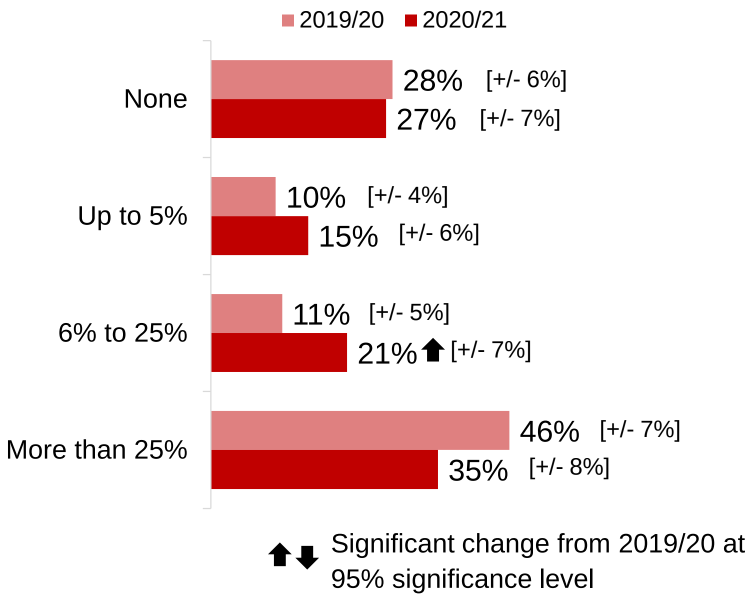
Missions service use was split between businesses with high turnovers of £500,000 or more (55%) and those with lower turnovers (45%), in line with the previous year. A third of firms (35%) reported that more than a quarter of their turnover came from exporting. Two in ten (21%) said that between 6% and 25% of their turnover came from exporting (compared to 11% of businesses in 2019/20).

Chart 3.4.9 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used Missions (excluding Don’t know/Refused) (n=105).

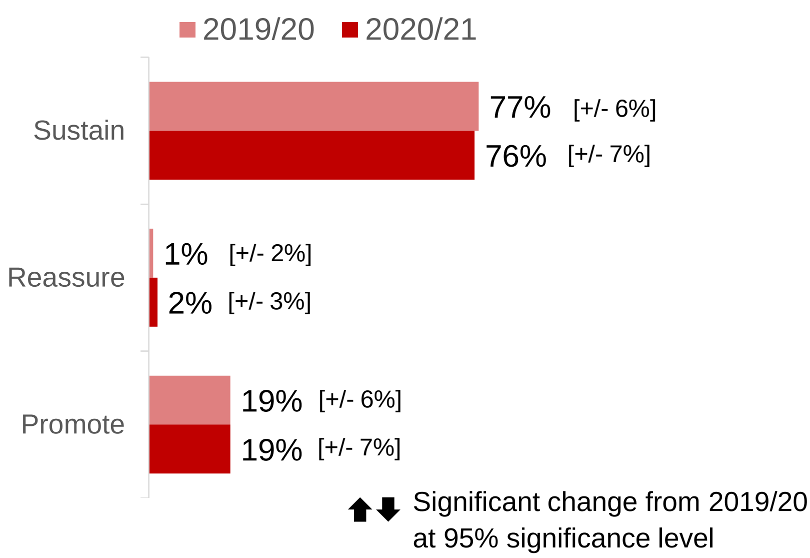
Chart 3.4.10 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Missions (n=143).

Current exporters made up the majority of businesses using the Missions service. More than seven in ten businesses (76%) were currently exporting ('Sustain'), although two in ten (19%) had never exported before ('Promote'). Only two percent had exported before but not in the past 12 months ('Reassure')[35]. This remained in line with the previous year.

Chart 3.4.11 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas. Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Missions (n=143).

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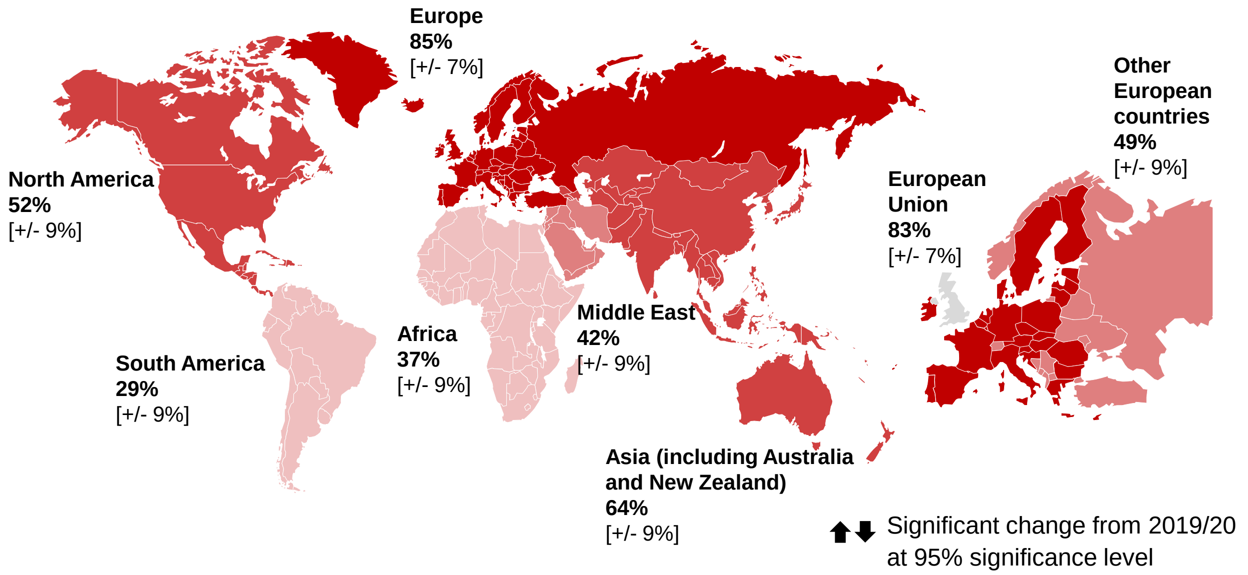
[35] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

Among the 42 former exporters using the Missions service, 29 had plans to export again in the next 12 months and ten had plans to export further in the future.

Europe remained the most common export market among Missions users. Among those who were currently exporting or had done so previously, more than eight in ten (83%) exported to the European Union, followed by Asia (64%), North America (52%) and non-EU European countries (49%). These findings were in line with the previous year.

Chart 3.4.12 Regions organisations export to or exported to previously – Missions



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Missions and who have exported (n=116).

Table 3.3.1 Regions organisations export to or exported to previously – Missions

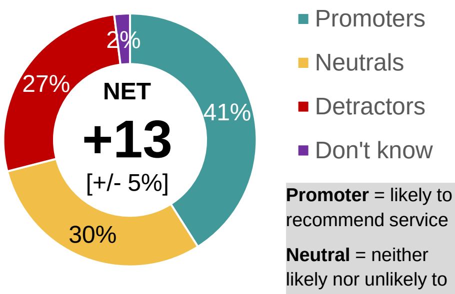
	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	79%	7%	85%	7%	-
European Union	74%	7%	83%	7%	-
Other European countries	55%	8%	49%	9%	-
Asia (including Australia and New Zealand)	64%	8%	64%	9%	-
North America	60%	8%	52%	9%	-
Middle East	53%	8%	42%	9%	-
Africa	43%	8%	37%	9%	-
South America	38%	8%	29%	9%	-

↑↓ Significant change from 2019/20 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Missions and who have exported (n=116).

Summary: Overseas Business Network Initiative (OBNI)

Net Promoter Score



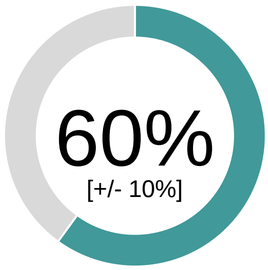
2019/20: +12
[+/- 4%]

Promoter = likely to recommend service

Neutral = neither likely nor unlikely to recommend service

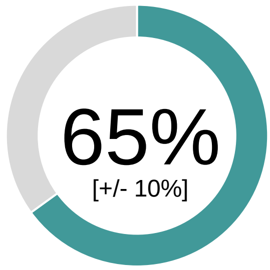
Detractor = unlikely to recommend service

Overall service met needs



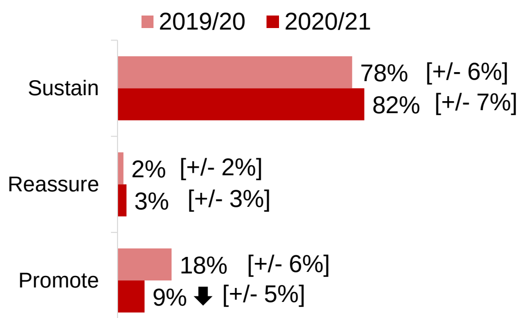
2019/20: 55%
[+/- 8%]

Satisfaction with service



2019/20: 61%
[+/- 8%]

Exporter status



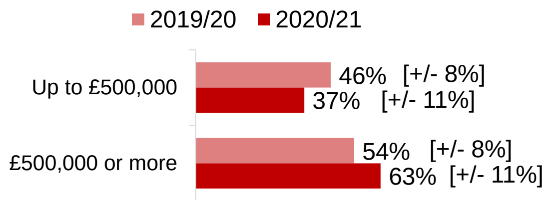
Sustain = current exporters

Reassure = exported before but not in the last 12 months

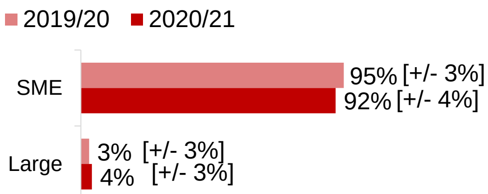
Promote = not exported before

Significant change from 2019/20 at 95% significance level

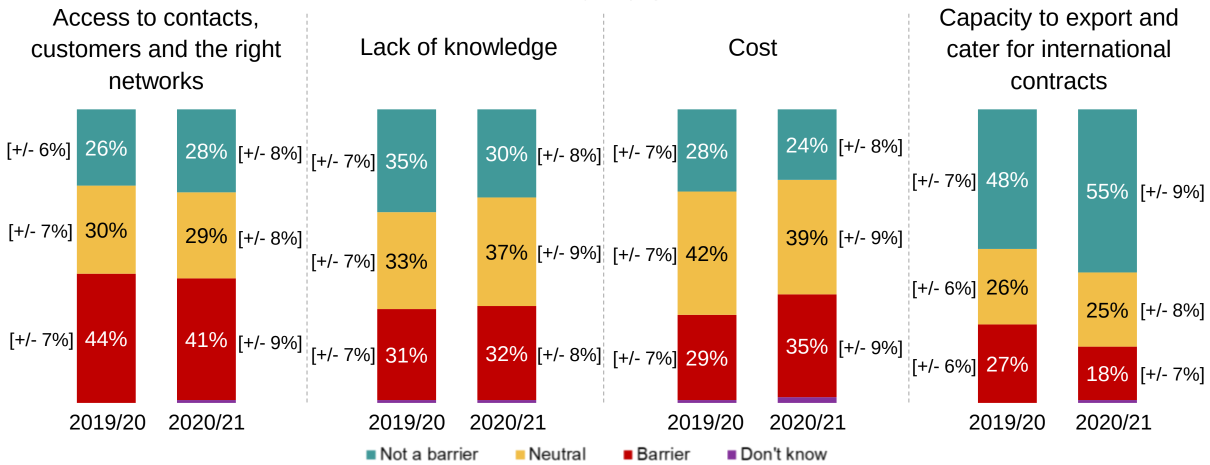
Turnover



Size



Barriers



3.5. Overseas Business Network Initiative (OBNI)

The Overseas Business Network Initiative (OBNI) centres around the creation or enhancement of business-led support services in a number of key growth export markets. It can provide information about an overseas market, or contacts for possible customers or business partners. It can also provide other help, such as planning and organising events or promotional activity in overseas markets.

This chapter explores satisfaction with the OBNI service, actions taken as a result of using the service, and the exporting profile of service users. The findings are based on interviews with 127 businesses who used OBNI between April 2020 and March 2021.

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

Key changes since 2019/20:

The NPS for OBNI was +13, which was in line with +12 in the previous year. While satisfaction with OBNI and overall attitudes to the service remained in line with the previous year, businesses in 2020/21 were more positive about the comprehensiveness of the information they received (72% compared to 58% in 2019/20). At the same time, fewer businesses were negative about staff knowledge (2% compared to 9% in 2019/20).

There were some differences in the profile of businesses that had used OBNI compared to the previous year. OBNI users in 2020/21 were more likely to have had some experience of exporting; one in ten (9%) had never exported before ('Promote'), down from 18% in the previous year. Although Europe remained the most common export market among OBNI users, more businesses had exported to the Middle East (70% compared to 56% in 2019/20), Africa (56% compared to 37% in 2019/20) and South America (42% compared to 27% in 2019/20). It is possible that these changes in the profile of users may have influenced views of the OBNI service.

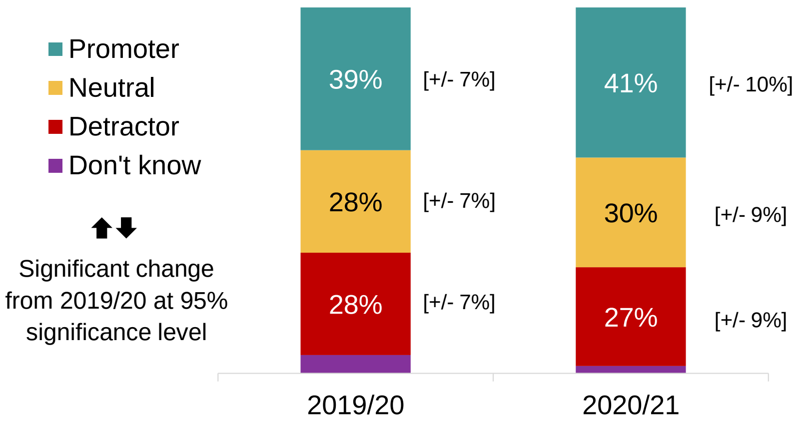
3.5.1. Satisfaction with the OBNI service

3.5.1.1 Service performance

Businesses gave a mixed response as to whether they would recommend the OBNI service to colleagues and business associates. Four in ten users (41%) were 'Promoters', i.e. likely to recommend the service, while a quarter (27%) were 'Detractors', i.e. unlikely to recommend the service[36]. These findings were in line with the previous year.

[36] 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) – OBNI



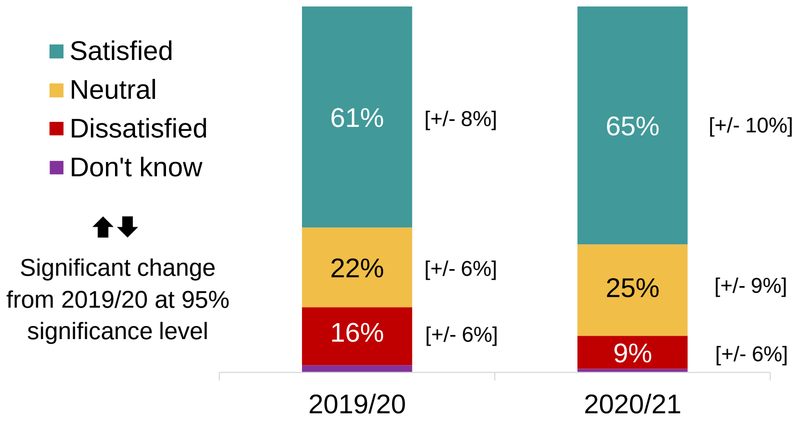
Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used OBNI (n=127).

Businesses felt that the service **could be improved** by having more tailored support relevant to their industry or sector (20%). One in ten (10%) suggested the service could provide more information, advice or guidance. Three in ten (30%) could not think of any ways in which the service could be improved[37].

3.5.1.2 Satisfaction

Satisfaction with OBNI remained in line with the previous year. Two-thirds of respondents (65%) were satisfied with their experience and around one in ten (9%) were dissatisfied[38].

Chart 3.5.2 Satisfaction with service - OBNI



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used OBNI (excluding 'not applicable' responses) (n=123).

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[37] When asked how the service could be improved, 27% said Don't know, 3% said Nothing, no improvement needed or the service was fine as it is, and 1% had no answer or no comment.

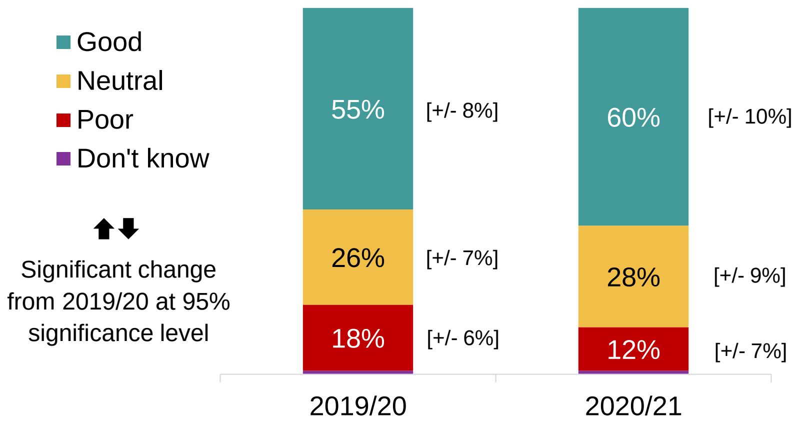
[38] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

Of the 17 businesses that were dissatisfied with the service (i.e. they rated the service as poor), 12 reported that their **reason for dissatisfaction** was because the OBNI service did not give them enough information or advice, and ten felt that the service did not do anything for them or did not help them.

3.5.1.3 Whether overall service met needs

The majority of businesses said that the OBNI service had met their needs; six in ten (60%) rated it as good, while around one in ten (12%) rated it as poor[39]. These findings were in line with the previous year.

Chart 3.5.3 Rating of whether overall service met needs – OBNI



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used OBNI (excluding 'not applicable' responses) (n=121).

Businesses were most positive about staff knowledge (80%), followed by the comprehensive nature of the information they received (72%), the clarity of the steps they needed to take when using the service (72%) and the amount of time taken to receive information (70%). Businesses were least positive about the quality of contacts they were provided with (56%)[40]. Compared to the previous year, more businesses were positive about the comprehensiveness of information received (72% compared to 58% in 2019/20), and fewer gave negative ratings (5% compared to 15% in 2019/20). Fewer businesses were also negative about staff knowledge (2% compared to 9% in 2019/20).

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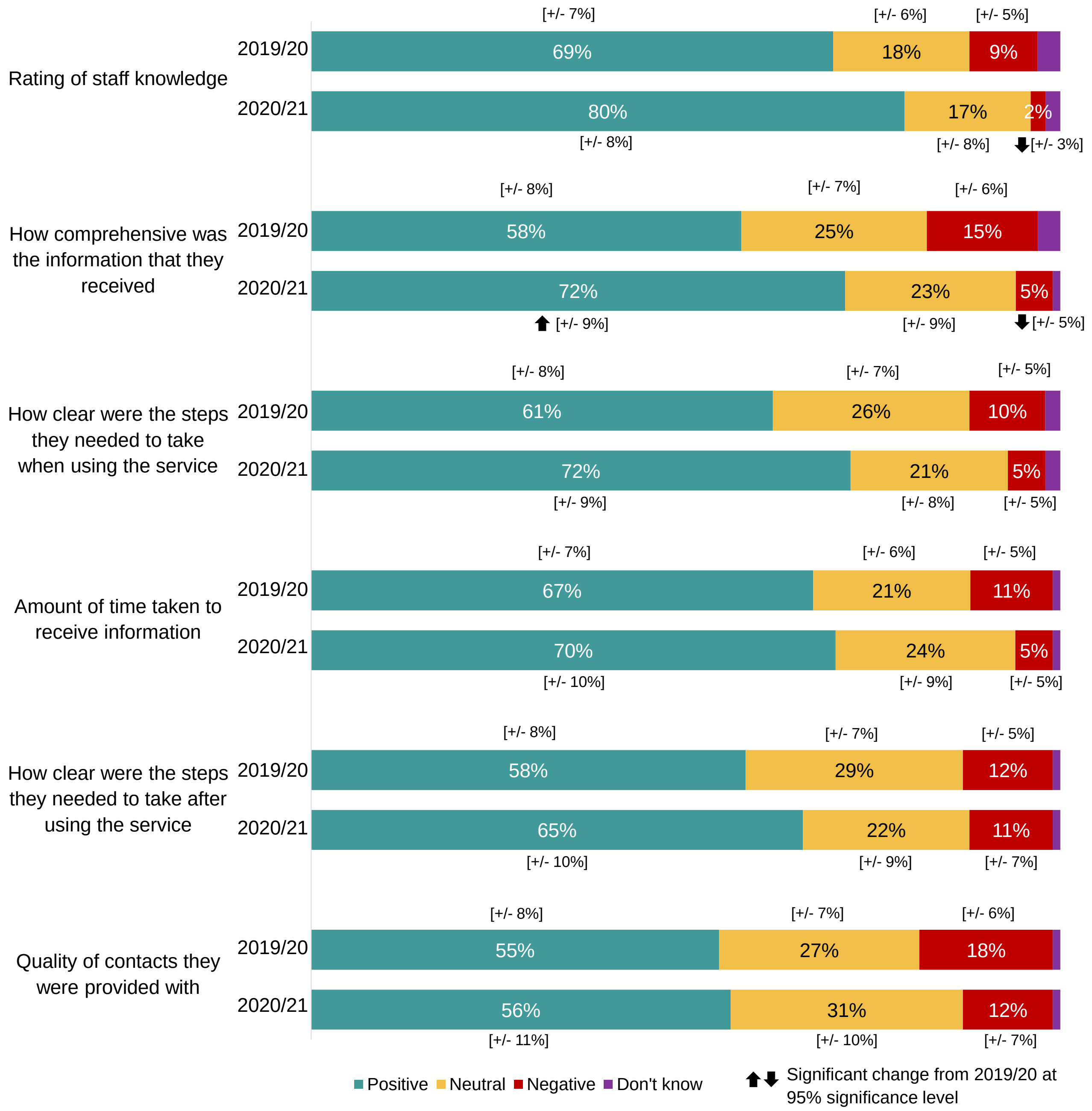
[39] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.
[40] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

Chart 3.5.4 Rating by business of the specific advice and support they received – OBNI



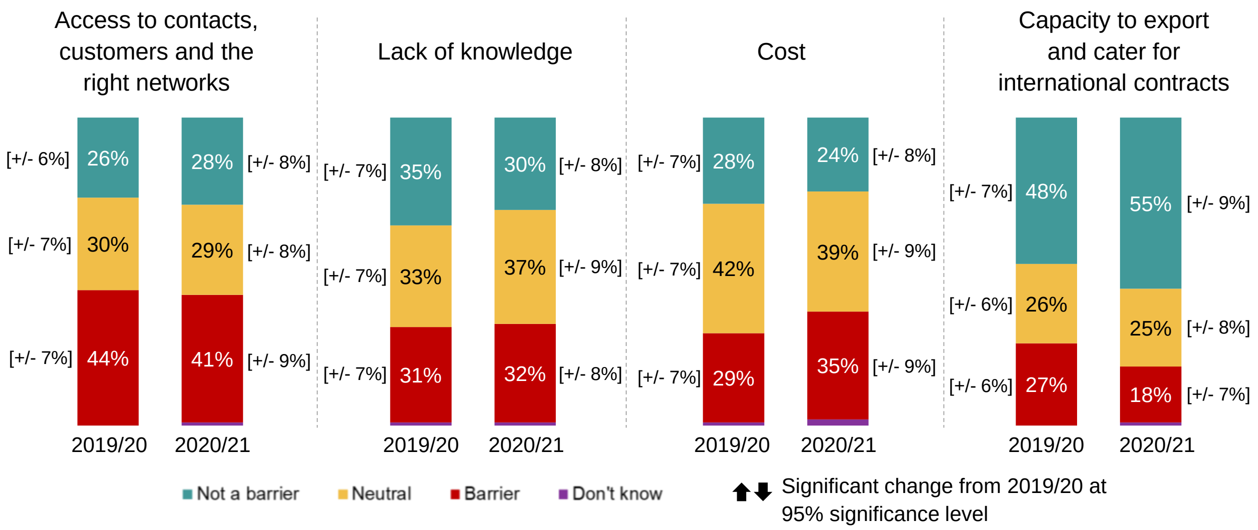
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=118). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=119). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=120). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=118). Qclarity_2 – The service made clear what I should do next after using it (n=120). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=109). Base: All respondents that used each service (excluding 'not applicable' responses).

3.5.2. Outcomes of using the OBNI service

3.5.2.1 Counteracting the barriers to exporting

Businesses that used the OBNI service reported facing barriers to exporting[41]. Four in ten (41%) reported access to networks was a barrier, while a third said that cost (35%) or lack of knowledge (32%) were barriers. Users were less likely to perceive their capacity to export (18%) as a barrier. These findings were in line with the previous year.

Chart 3.5.5 Barriers to exporting – OBNI



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OBNI (excluding 'not applicable' responses) (ranging from n=121 to n=126).

Businesses were asked whether using OBNI (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using OBNI had helped them understand how to increase their knowledge of the exporting process (40%), build overseas contacts or networks (38%), or to assess their capacity and readiness to export (29%). This was in line with the previous year.

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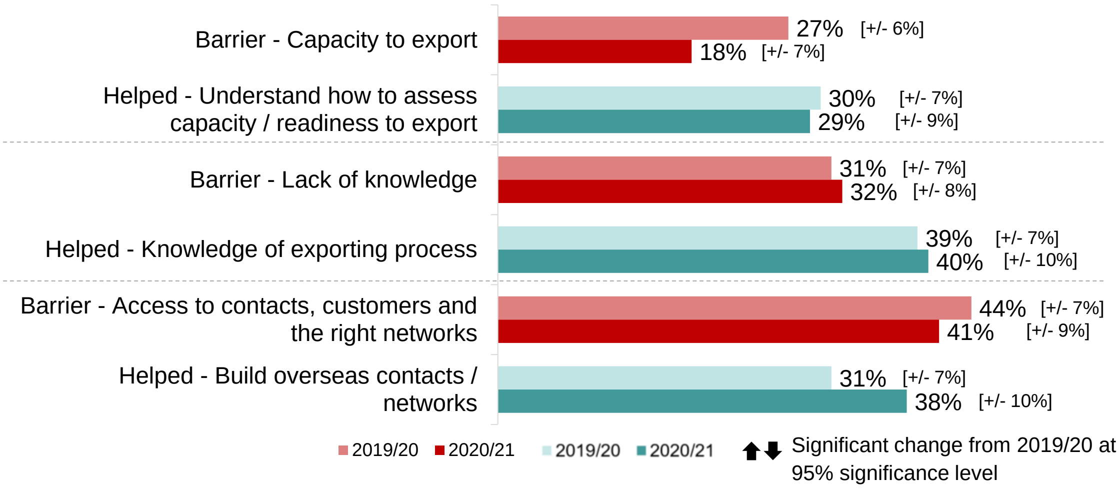
[41] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

Chart 3.5.6 Barriers to exporting and how DIT helped – OBNI



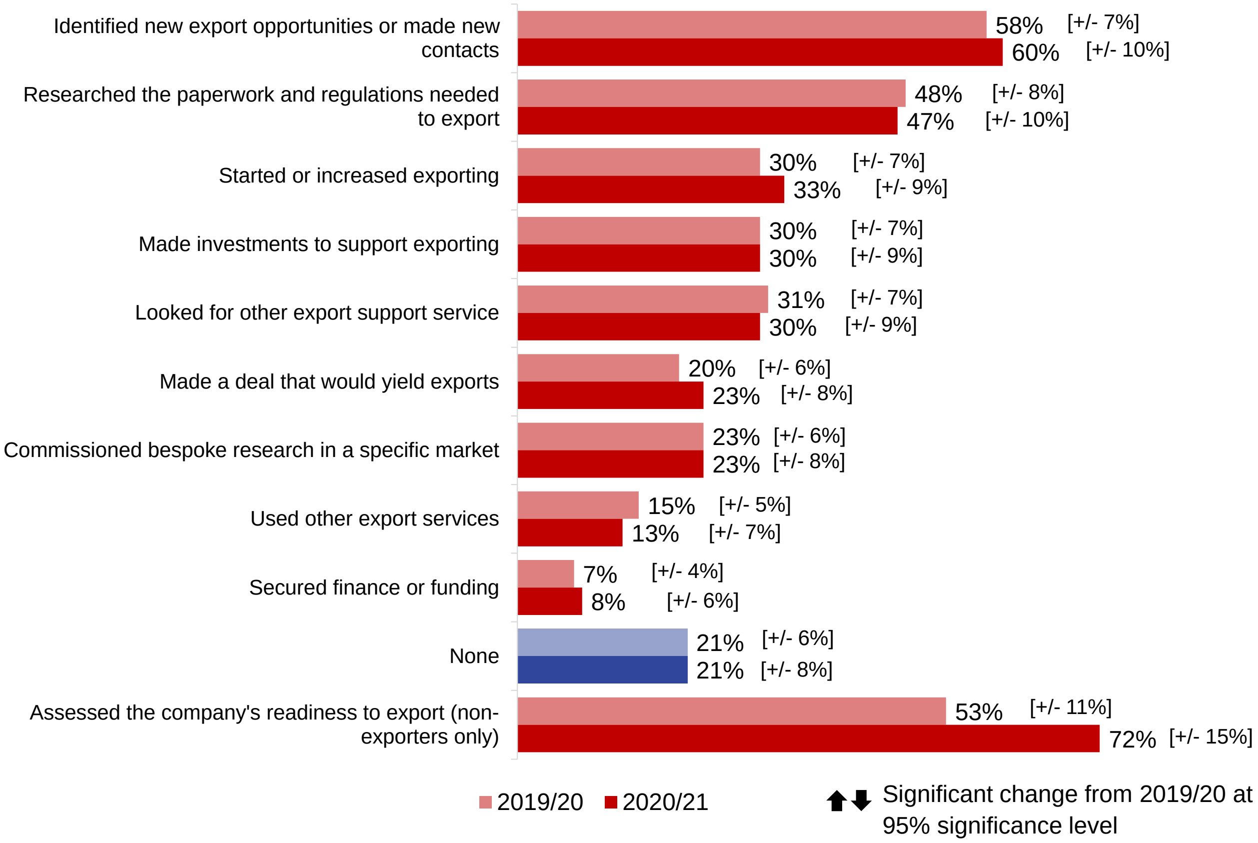
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OBNI (excluding 'not applicable' responses) (ranging from n=121 to n=126*).*
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … Increase your knowledge of the exporting process / understand how to assess your own business capacity or readiness to export / build overseas contacts and networks? Base: All respondents who used OBNI (n=127).

3.5.2.2 Taking action

Businesses had taken a range of actions as a result of using OBNI. Seven in ten businesses[42] (72%) that were not exporting at the time of using the service, had assessed the company's readiness to export. Among all businesses, six in ten (60%) said they had identified new export opportunities or made new contacts, while just under half (47%) had researched the paperwork and regulations needed to export. Around three in ten had started or increased exporting (33%), had made investments to support exporting or had looked for other export support services (both 30%). These findings were in line with the previous year.

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

Chart 3.5.7 Actions taken as a result of service interaction - OBNI

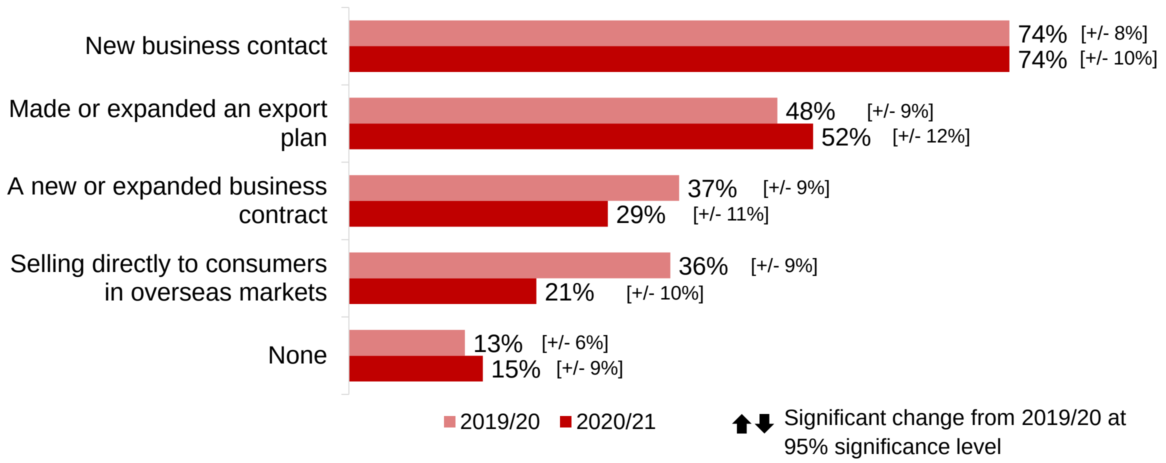


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used OBNI (n=127); Non-exporters (n=24, a small base size).

3.5.2.3 Identifying new opportunities

As a result of using OBNI, 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 (52%), making a new or expanded business contract (29%) or selling directly to consumers in overseas markets (21%). These findings were in line with the previous year.

Chart 3.5.8 Opportunities identified as a result of service interaction – OBNI



Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used OBNI who had identified a new business contact as part of the DIT service (n=89, a small base size).

Among the 103 businesses that had identified a new business contact as part of the DIT service, just under three in five (57%) had contacted a distributor and half (50%) had made contact with a buyer.

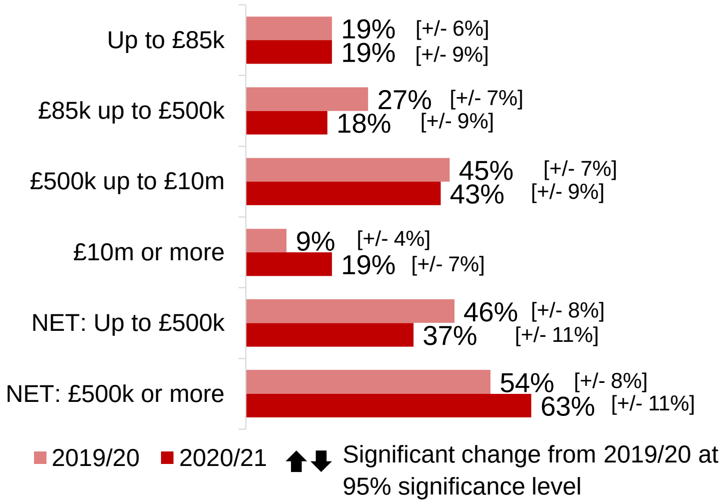
3.5.2.4 Making investments

Overall, 56 businesses had invested in exporting after using the service. Among these, 50 had increased their marketing and sales activity and 32 had made Research and Development investments. In addition, 20 had increased the number of staff based abroad, which was an increase compared to the previous year (36% compared to 15% in 2019/20).

3.5.3. Service use by firmographics and export behaviour

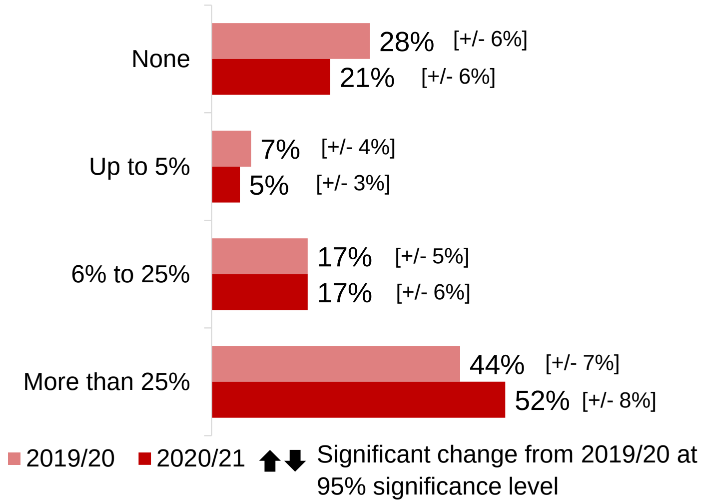
The majority of OBNI service users had a high turnover of £500,000 or more (63%), while around four in ten had lower turnovers (37%), in line with the previous year. Half of firms (52%) reported that more than a quarter of their turnover came from exporting.

Chart 3.5.9 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used OBNI (excluding Don't know/Refused) (n=88, a small base size).

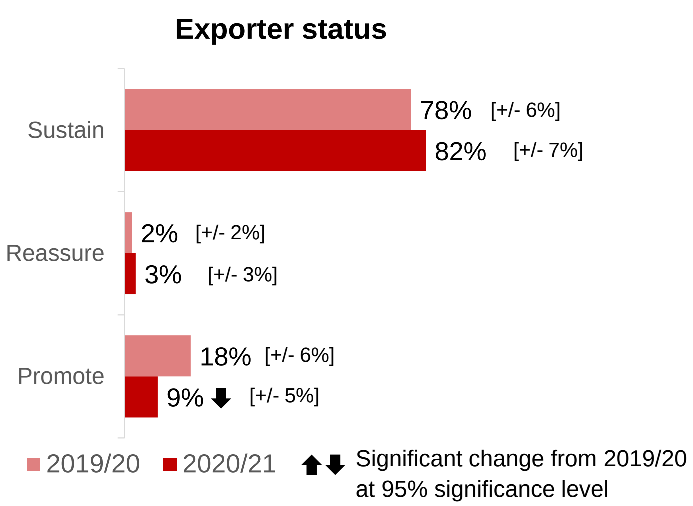
Chart 3.5.10 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used OBNI (n=127).

Current exporters made up the majority of businesses using the OBNI service. Around eight in ten businesses (82%) were currently exporting ('Sustain'), while one in ten (9%) had never exported before ('Promote'), down from the previous year (18% in 2019/20). Only three percent had exported before but not in the past 12 months ('Reassure') [43].

Chart 3.5.11 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used OBNI (n=127).

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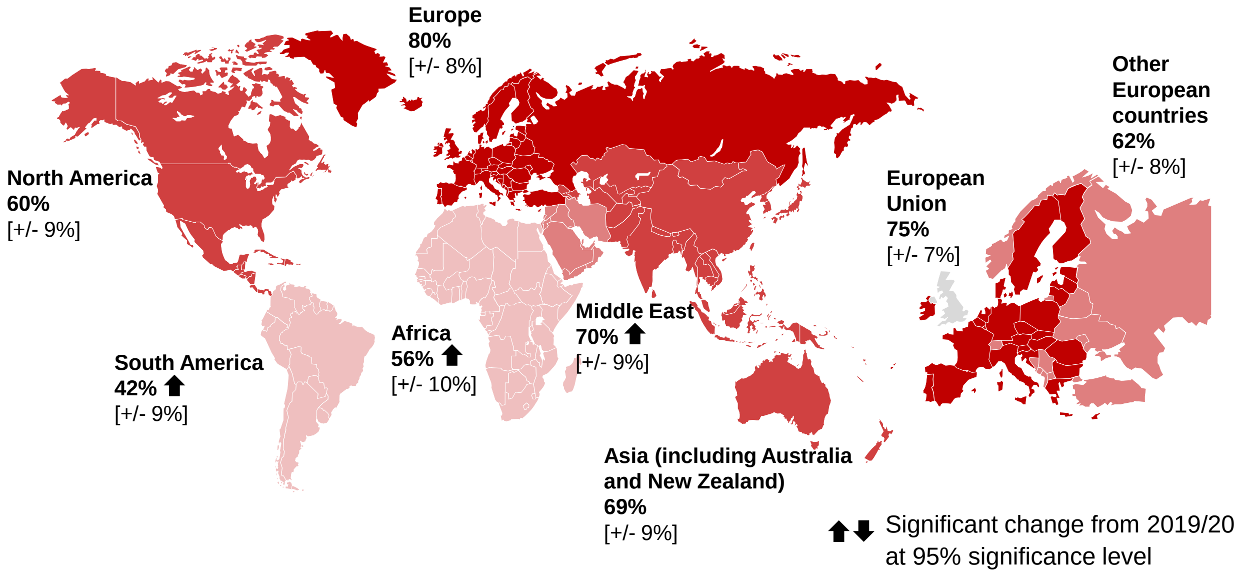
[43] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

Europe remained the most common export market among OBNI users. Among those who were currently exporting or had done so previously, three-quarters (75%) exported to the European Union, followed by the Middle East (70%, up from 56% in the previous year), Asia (69%), non-EU European countries (62%), North America (60%), Africa (56%, up from 37%) and South America (42%, up from 27%).

Chart 3.5.12 Regions organisations export to or exported to previously – OBNI



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used OBNI and who have exported (n=110).

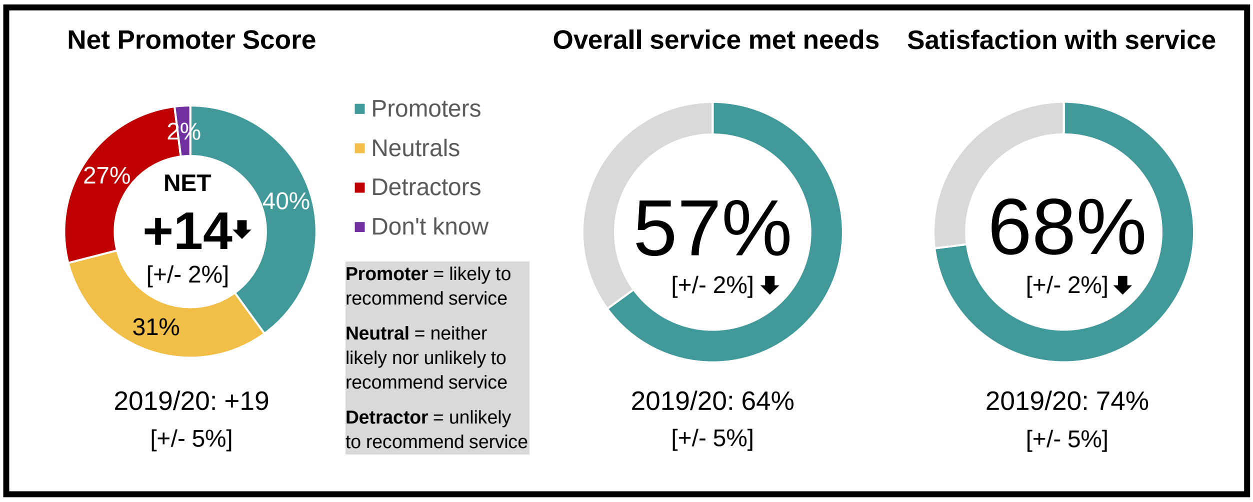
Table 3.5.1 Regions organisations export to or exported to previously – OBNI

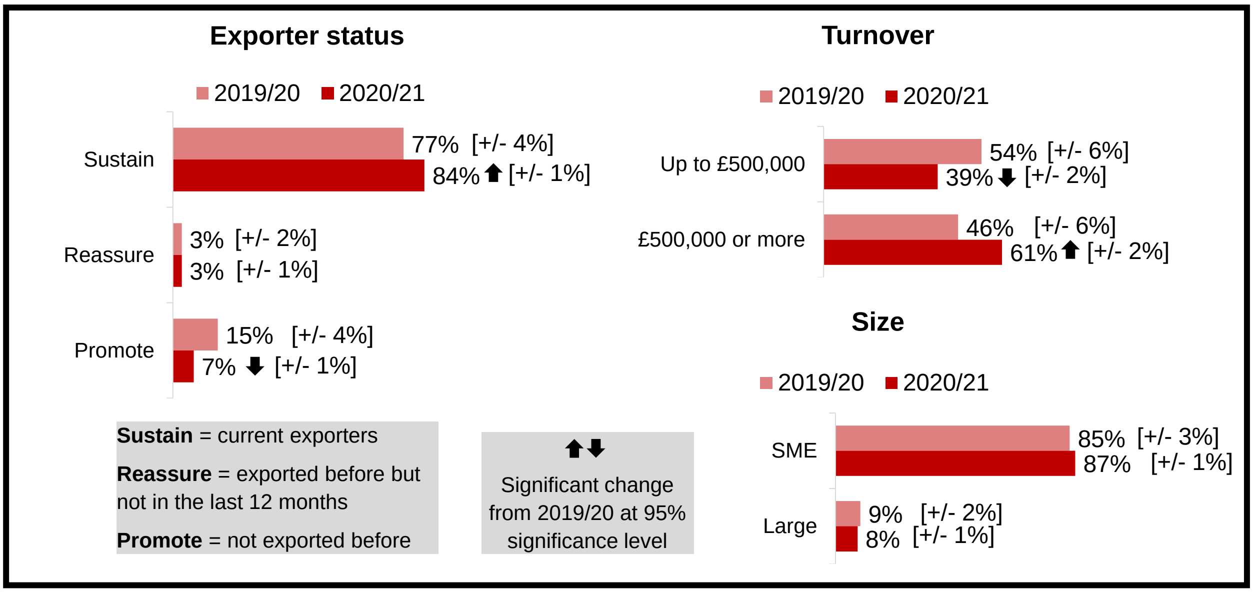
	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	87%	5%	80%	8%	-
European Union	82%	6%	75%	7%	-
Other European countries	58%	8%	62%	8%	-
Middle East	56%	8%	70%	9%	↑
Asia (including Australia and New Zealand)	62%	8%	69%	9%	-
North America	58%	8%	60%	9%	-
Africa	37%	8%	56%	10%	↑
South America	27%	7%	42%	9%	↑

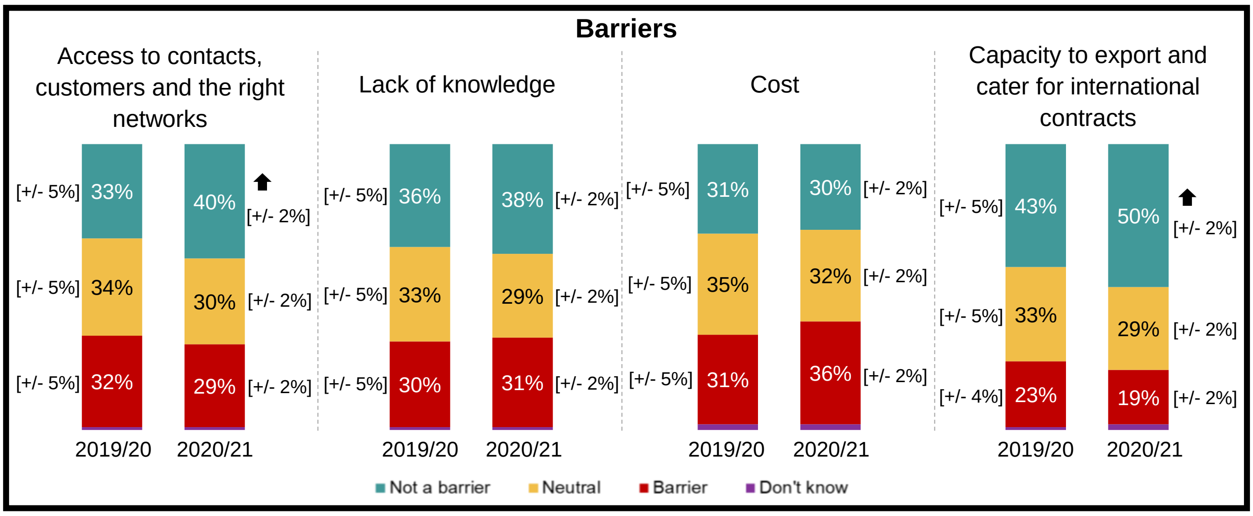
↑↓ Significant change from 2019/20 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used OBNI and who have exported (n=110).

Summary: Webinars







3.6. Webinars

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

This chapter explores satisfaction with the Webinars service, actions taken as a result of using the service, and the exporting profile of service users. The findings are based on interviews with 2,378 businesses that used Webinars between April 2020 and March 2021.

In 2020, DIT expanded its service offering to include three different types of webinars that could provide specific advice and information relevant to COVID-19 and the EU Exit. As a result, reporting differentiates between these and the standard Webinar offer.

Throughout this chapter, the findings have been compared between these three different types. Summary charts for Standard, COVID-19 and EU Exit Webinars are included as an appendix.

Key changes since 2019/20:

The NPS for Webinars was +14, which was a decline from +19 in the previous year. Satisfaction with Webinars decreased this year (68% compared to 74% in 2019/20), and fewer businesses felt that the service had met their needs (57% compared to 64% in 2019/20). In term of whether users would recommend the service, the Net Promoter Score ('Promoters' minus 'Detractors') was lower in 2020/21 (+14 compared to +19 in 2019/20)[44].

However, as a result of using the Webinars service, more businesses had taken some form of action, such as researching the paperwork and regulations needed to export (57% compared to 48% in 2019/20) or securing finance or funding (6% compared to 2% in 2019/20). At the same time, fewer businesses said they had commissioned bespoke research in a specific market (10% compared to 14% in 2019/20) and fewer non-exporting businesses had assessed the company's readiness to export (38% compared to 58% in 2019/20).

Some of these changes may be explained by differences in the profile of businesses that used Webinars compared to the previous year. Businesses had a higher turnover; 61% had a turnover of £500,000 or more (compared to 46% in 2019/20). Users were more likely to be current exporters ('Sustain') (84% compared to 77% in 2019/20) and were less likely to have never exported before ('Promote') (7% compared to 15% in 2019/20). Fewer users exported to Europe (87% compared to 91% in 2019/20), although more exported to Africa (38% compared to 32% in 2019/20).

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

3.6.1. Satisfaction with the Webinars service

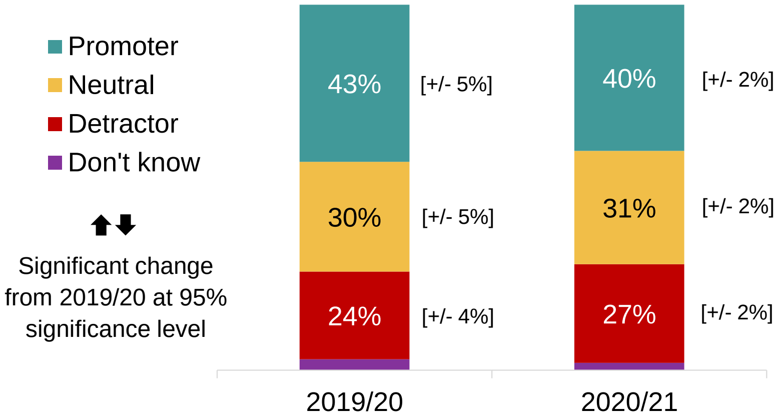
3.6.1.1 Service performance

Businesses gave a mixed response as to whether they would recommend the Webinars service to colleagues and business associates. Four in ten users (40%) were 'Promoters', i.e. likely to recommend the service, and just under three in ten (27%) were 'Detractors', i.e. unlikely to recommend the service[45]. These individual ratings were in line with the previous year, although the Net Promoter Score ('Promoters' minus 'Detractors') was lower in 2020/21 (+14 compared to +19 in 2019/20).

When comparing the findings across the three different types of services, the NPS for Standard Webinars was +24, while it was lower for COVID-19 Webinars (+15) and EU Exit Webinars (+3).

Firms exporting both goods and services were more likely to say they would recommend the Webinars service (48%), compared to firms exporting only goods (39%) or only services (35%).

Chart 3.6.1 Likelihood of recommending service (NPS) – Webinars



Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Webinars (n=2,378).

Businesses felt that the service **could be improved** by having information that was more tailored or relevant to their industry or sector (20%). Other suggestions were that Webinar presentations could be more relevant, with specialist or in-depth detail (7%), that the service could have offered more information, advice or guidance (7%), that there could have been more feedback, follow-up or aftercare (6%) or that presentations could use clearer or more simple language that avoided jargon (5%). Two in five businesses (39%) could not think of any ways in which the service could be improved[46].

3.6.1.2 Satisfaction

Satisfaction with Webinars decreased compared to the previous year. Around two-thirds of respondents (68%) said they were satisfied with their experience (compared to 74% in 2019/20), and eight percent said they were dissatisfied (in line with 7% in 2019/20)[47].

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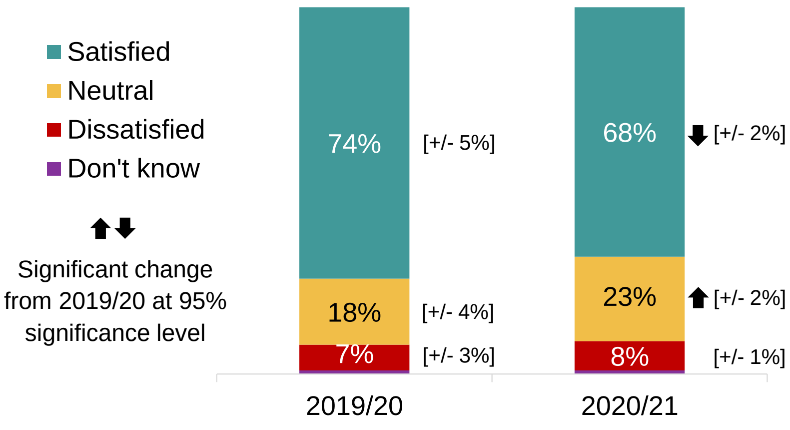
[45] Ibid.
[46] When asked how the service could be improved, 27% said Don't know, 10% said Nothing, no improvement needed or the service was fine as it is, and 2% had no answer or no comment.
[47] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

When comparing across the three different types of services, businesses were more satisfied with Standard Webinars (73%) than they were with COVID-19 Webinars (66%) or EU Exit Webinars (64%). More medium and large businesses were satisfied with Webinars overall (77% and 75% respectively), compared to micro and small businesses (64% and 67% respectively).

Chart 3.6.2 Satisfaction with service - Webinars



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Webinars (excluding 'not applicable' responses) (n=2,351).

Of the 213 businesses that were dissatisfied with the service (i.e. they rated the service as poor), the most common **reason for dissatisfaction**[48] was feeling that they did not get enough information or advice (68%), while around half felt that the service did not do anything for them or did not help them (48%). Around three in ten reported that the advice was more relevant to other types of businesses (29%). The proportion of users who were dissatisfied because they felt they did not get enough information or advice, was higher for EU Exit Webinars (77%).

3.6.1.3 Whether overall service met needs

Fewer businesses were positive that the Webinars service had met their needs; just under six in ten (57%) rated it as good (compared to 64% in 2019/20), and around one in ten (13%) rated it as poor (in line with 10% in 2019/20)[49].

When comparing the findings across the three different types of webinars, businesses were more satisfied that Standard Webinars had met their needs (64%) compared to COVID-19 Webinars (58%) or EU Exit Webinars (50%).

Medium and large businesses were more likely to say that the Webinars service had met their needs (65% and 70% respectively), compared to micro and small businesses (52% and 57% respectively).

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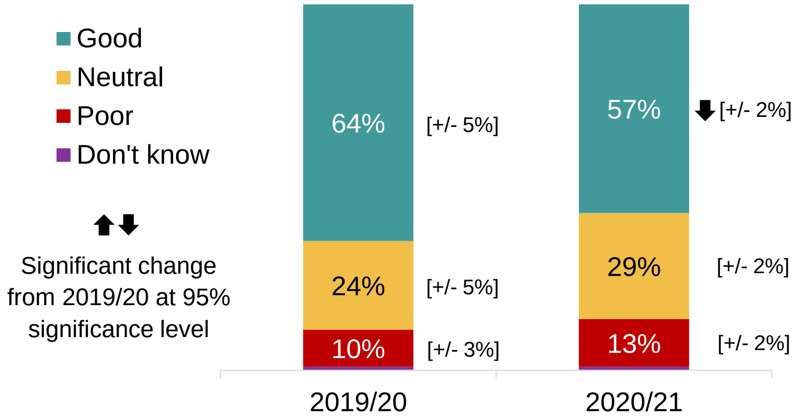
[48] Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.
[49] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor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

Chart 3.6.3 Rating of whether overall service met needs – Webinars

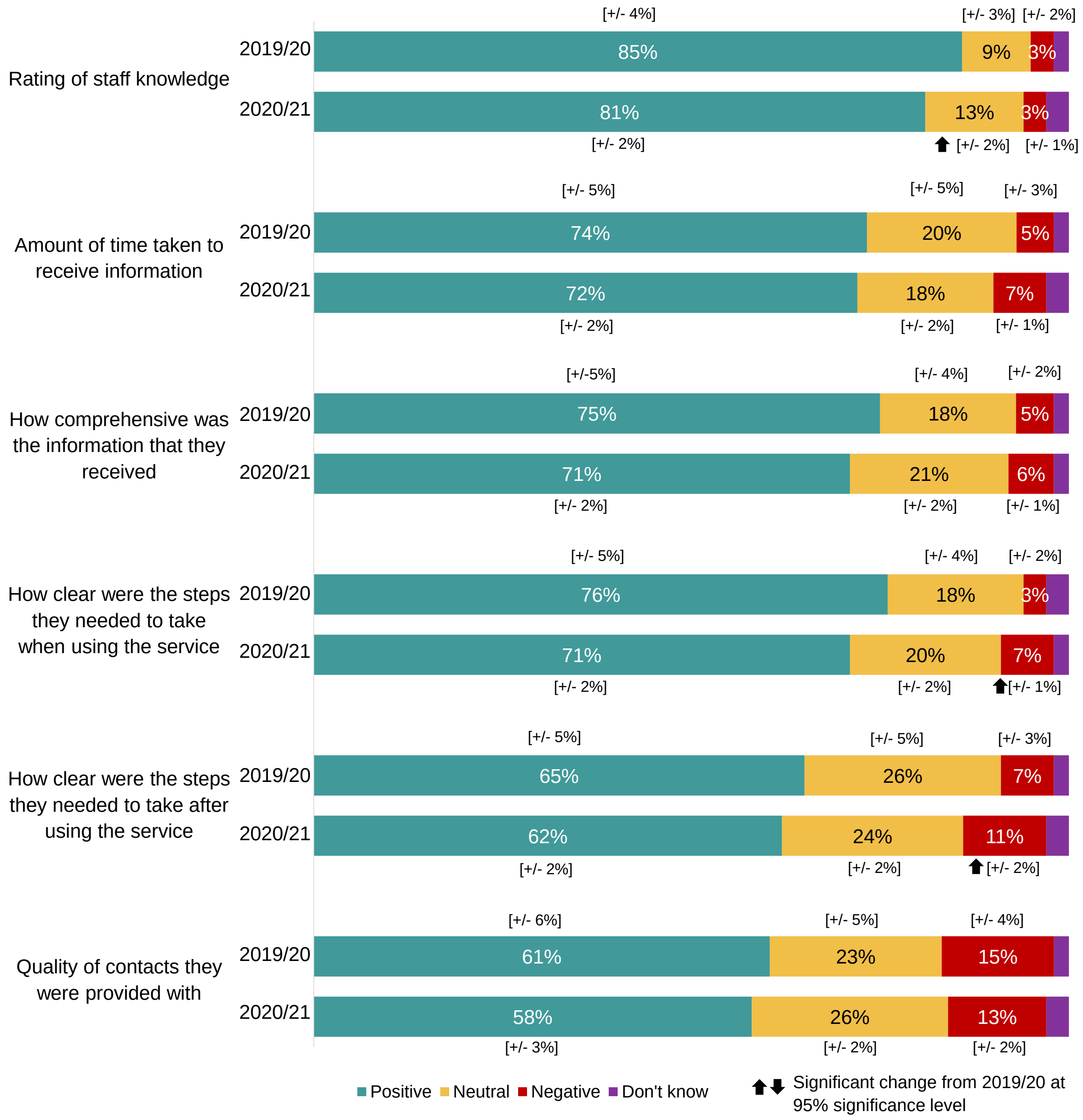


Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Webinars (excluding 'not applicable' responses) (n=2,294).

Businesses were most positive about staff knowledge (81%), followed by the amount of time taken to receive information (72%), how comprehensive the information they received was (71%) and how clear they were on the steps that they needed to take when using the service (also 71%). They were least positive about the quality of contacts they were provided with (58%)[50]. Compared to the previous year, more businesses gave negative ratings about the clarity of the steps they needed to take, both when using the service (7% compared to 3% in 2019/20) and afterwards (11% compared to 7% in 2019/20).

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

Chart 3.6.4 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=2,242). Qtimetaken – How acceptable was the time taken to receive the information or support you required from the service? (n=1,925). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=2,284). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=2,323). Qclarity_2 – The service made clear what I should do next after using it (n=2,248). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=1,734). Base: All respondents that used each service (excluding 'not applicable' responses).

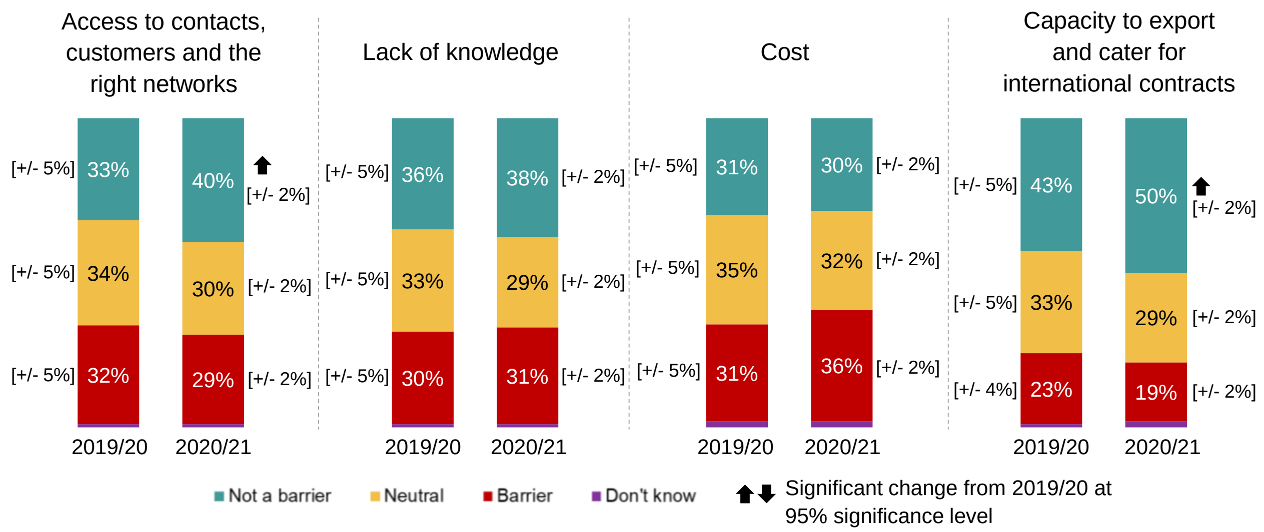
3.6.2. Outcomes of using the Webinars service

3.6.2.1 Counteracting the barriers to exporting

Businesses that used the Webinars service reported facing barriers to exporting[51]. Just over a third (36%) reported that cost was a barrier, while around three in ten perceived lack of knowledge (31%) or access to networks (29%) as barriers. One in five (19%) thought that their capacity to export was a barrier.

Compared to the previous year, a greater proportion of businesses said that they did not face barriers to exporting; specifically access to networks (40% compared to 33% in 2019/20) or capacity to export (50% compared to 43% in 2019/20).

Chart 3.6.5 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 respondents that used Webinars (excluding 'not applicable' responses) (ranging from n=2,208 to n=2,267).

The table below compares the proportion of users who reported that each of these factors were barriers to their business, by webinar type:

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

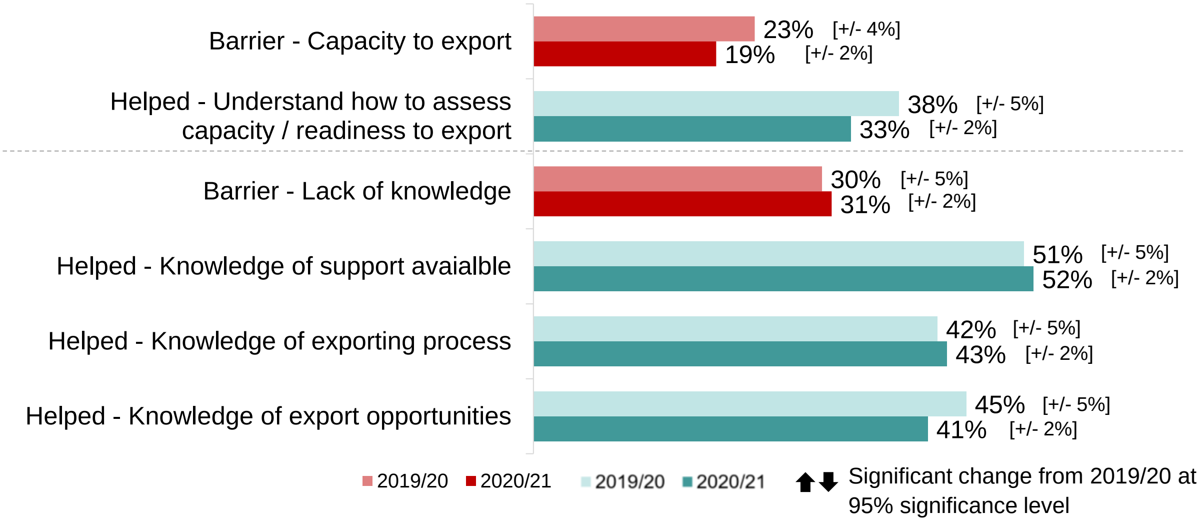
Table 3.6.1 Barriers to exporting by webinar type – Webinars

Webinar type	Access to contacts, customers, and the right networks	Lack of knowledge	Cost	Capacity to export and cater for international contracts
Standard Webinars	31% (+/- 3%)	28% (+/- 3%)	31% (+/- 3%)	19% (+/- 3%)
COVID-19 Webinars	37% (+/- 5%)	28% (+/- 4%)	35% (+/- 5%)	21% (+/- 4%)
EU Exit Webinars	23% (+/- 3%)	35% (+/- 3%)	41% (+/- 3%)	19% (+/- 3%)

All of the barriers were cited more frequently by micro businesses than larger businesses; for example, lack of access to networks was perceived to be a barrier by 34% of micro firms, compared to 27% of small firms, 22% of medium and 19% of large firms. In addition, access to networks was more likely to be cited by businesses that had been trading for 1-5 years (43%) compared to those that had been trading for 5 years or more (27%). Firms exporting goods only were more likely to see cost as a barrier to exporting than firms only exporting services (40% versus 26%).

Businesses were asked whether using Webinars (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Overall, businesses reported that using Webinars had helped them understand how to increase their knowledge in various ways: of the support available from DIT and elsewhere (52%), of the exporting process (43%), or of the exporting opportunities that were available (41%). A third said the service had helped them to understand how to assess their capacity and readiness to export (33%). These findings were in line with the previous year.

Chart 3.6.6 Barriers to exporting and how DIT helped – Webinars



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Webinars (excluding 'not applicable' responses) (ranging from n=2,208 to n=2,267).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of export opportunities available / increase your knowledge of the process of exporting / increase your knowledge of support available from DIT and elsewhere / understand how to assess your own business capacity or readiness to export? Base: All respondents who used Webinars (n=2,378).

3.6.2.2 Taking action

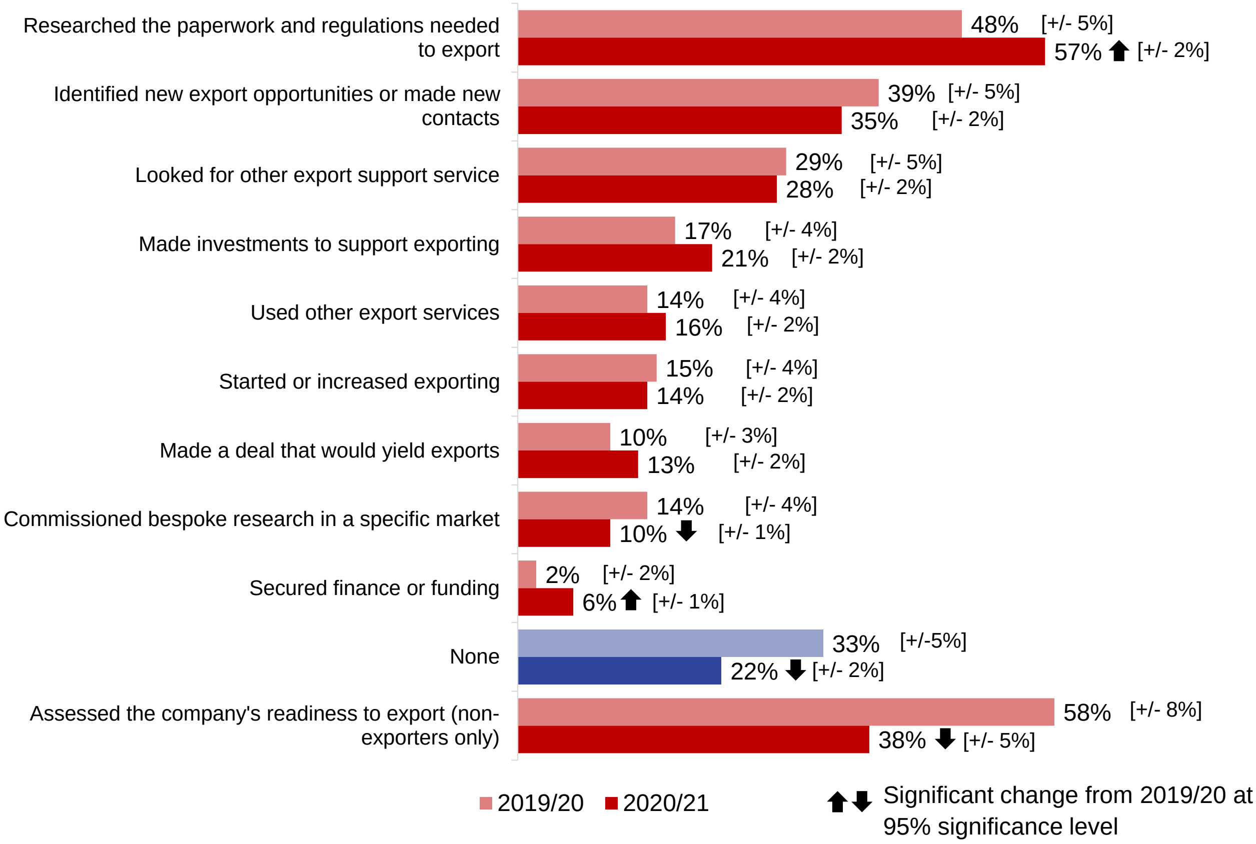
Businesses had taken a range of actions as a result of using Webinars. Around four in ten businesses (38%) that were not exporting at the time of using the service, had assessed the company's readiness to export. Among all businesses, just under six in ten (57%) said they had researched the paperwork and regulations needed to export. Around a third (35%) had identified new export opportunities or made new contacts, while almost three in ten (28%) had looked for other export support services.

Overall, the proportion of businesses saying they had taken no action fell compared to the previous year (22% said they took no action compared to 33% in 2019/20). When comparing the findings across the three different types of webinars, a quarter (25%) of Standard Webinars users said they had taken no action, compared to 24% of COVID-19 Webinars users and 19% of EU Exit Webinars users.

More businesses had researched the paperwork and regulations needed to export (57% compared to 48% in 2019/20) or had secured finance or funding (6% compared to 2% in 2019/20). However, fewer businesses said they had commissioned bespoke research in a specific market (10% compared to 14% in 2019/20), and fewer businesses that were not exporting had assessed the company's readiness to export (38% compared to 58% in 2019/20).

EU Exit Webinars users were most likely to have researched the paperwork and regulations needed to export (69%, compared to 48% of Standard Webinars and 47% of COVID-19 Webinars users).

Chart 3.6.7 Actions taken as a result of service interaction - Webinars



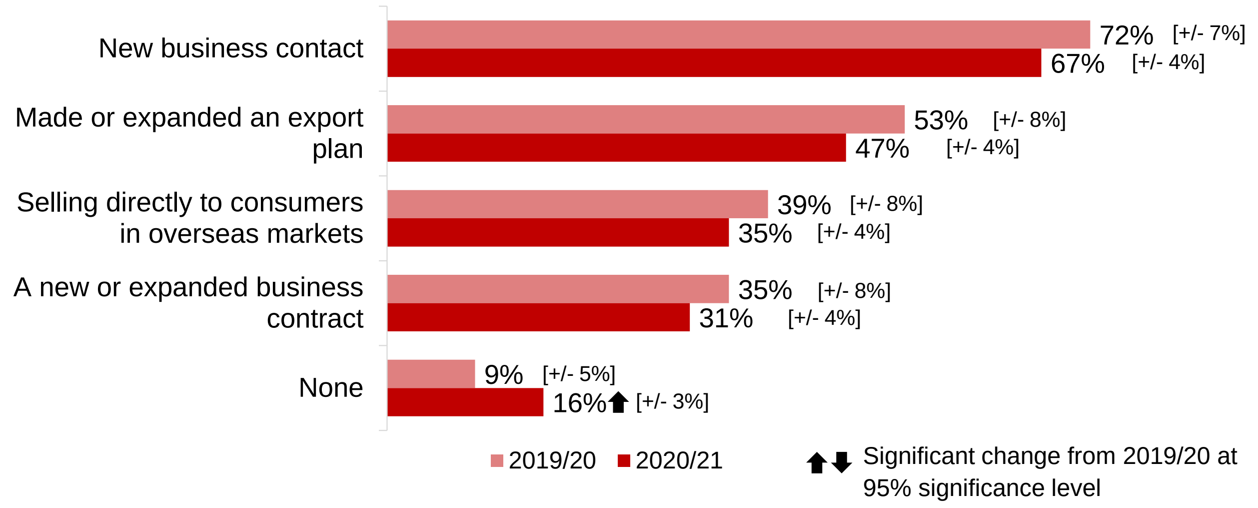
Qresult – What has your business done as a result of using [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Webinars (n=2,378); Non-exporters (n=429).

3.6.2.3 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 (67%), followed by making or expanding an export plan (47%), selling directly to consumers in overseas markets (35%) or making a new or expanded business contract (31%). These findings were generally in line with the previous year, although businesses were more likely to say they had not identified any opportunities (16% compared to 9% in 2019/20).

When comparing the findings across the three different types of webinars, one in five EU Exit Webinars users (21%) said they had not identified any opportunities, compared to 15% of Standard Webinars users and ten percent of COVID-19 Webinars users.

Chart 3.6.8 Opportunities identified as a result of service interaction – Webinars



Qresult_opps – Which of the following opportunities, if any, has your business identified? Base: All respondents that used Webinars who had identified a new business contact as part of the DIT service (n=905).

Among businesses that had identified a new business contact as part of the DIT service, around four in ten (41%) had made contact with a buyer, and a similar proportion had made contact with a distributor (39%).

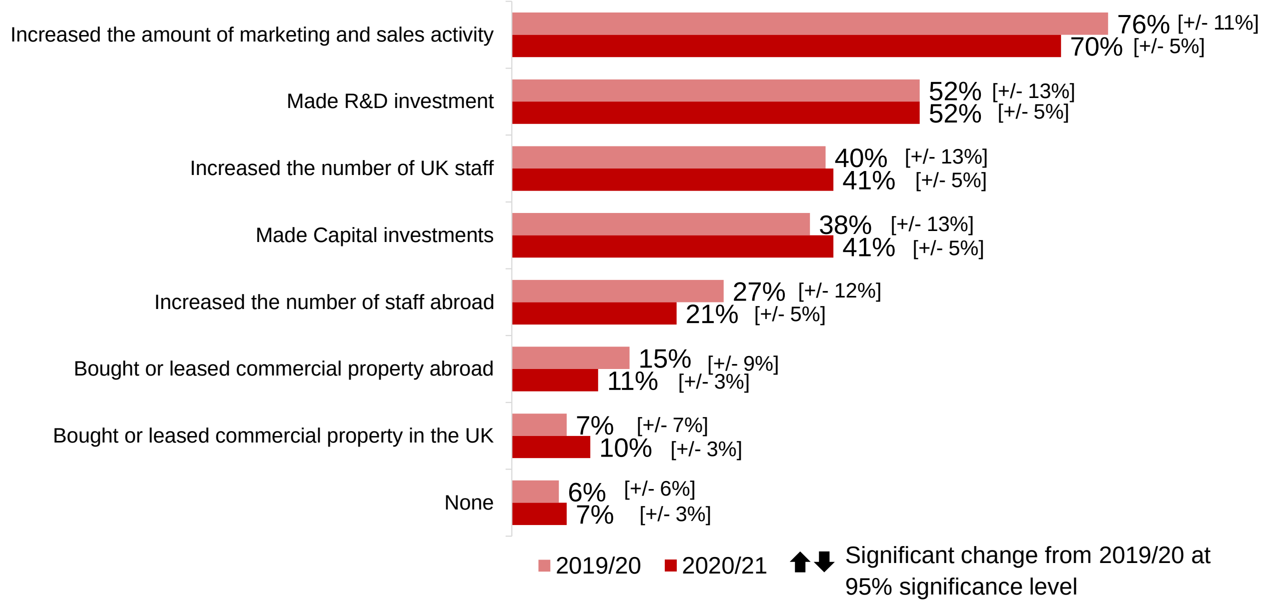
3.6.2.4 Making investments

Using the Webinars service helped investors to increase their **marketing and sales activities**. Among businesses that had invested in exporting after using the Webinars service (21% overall), seven in ten (70%) said they had increased their marketing and sales activity, while around half made a Research and Development investment (52%), and four in ten had increased their number of UK staff or made capital investments (both 41%). These findings remain unchanged compared to the previous year.

When comparing the findings across the three different types of webinars, four in five (78%) Standard Webinars or COVID-19 Webinars users said they had increased their marketing and sales activity, compared to just over half (55%) of EU Exit Webinars users.

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

Chart 3.6.9 Type of investments made as a result of DIT service – Webinars



Qresult_invest – Which of the following investments has your business made to support new or increased export opportunities? Only answers given by more than 3% of respondents are shown. Base: All respondents who had used Webinars and had made investments to support exporting (n=455).

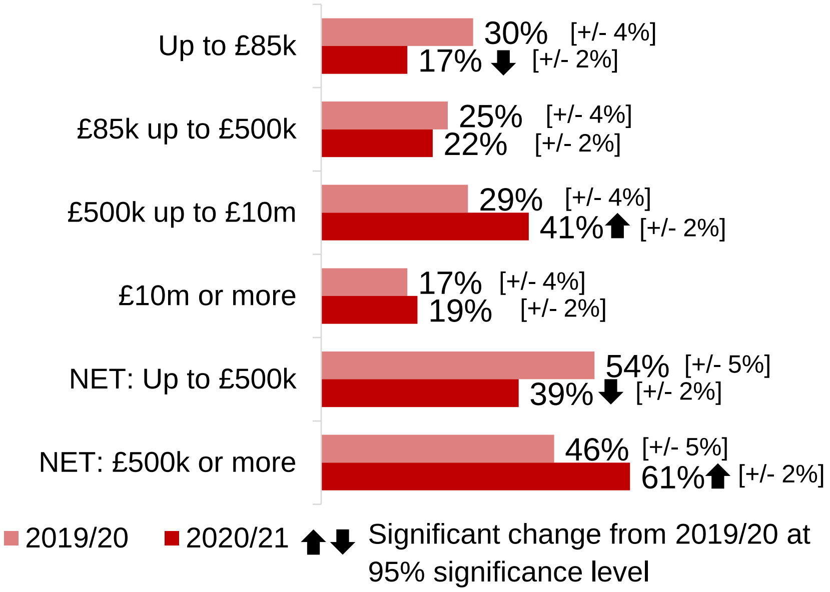
3.6.3. Service use by firmographics and export behaviour

Use of the Webinars service was more common among businesses with high turnovers of £500,000 or more (61%) compared to businesses with lower turnovers (39%). Compared to the previous year, businesses typically had a higher turnover; fewer had a low turnover of up to £85,000 (17% compared to 30% in 2019/20), while more had a turnover of between £500,000 and £10 million (41% compared to 29% in 2019/20).

When comparing the findings across the three different types of webinars, seven in ten EU Exit Webinars users (70%) had high turnovers of £500,000 or more, compared to 58% of Standard Webinars users and less than half (46%) of COVID-19 Webinars users.

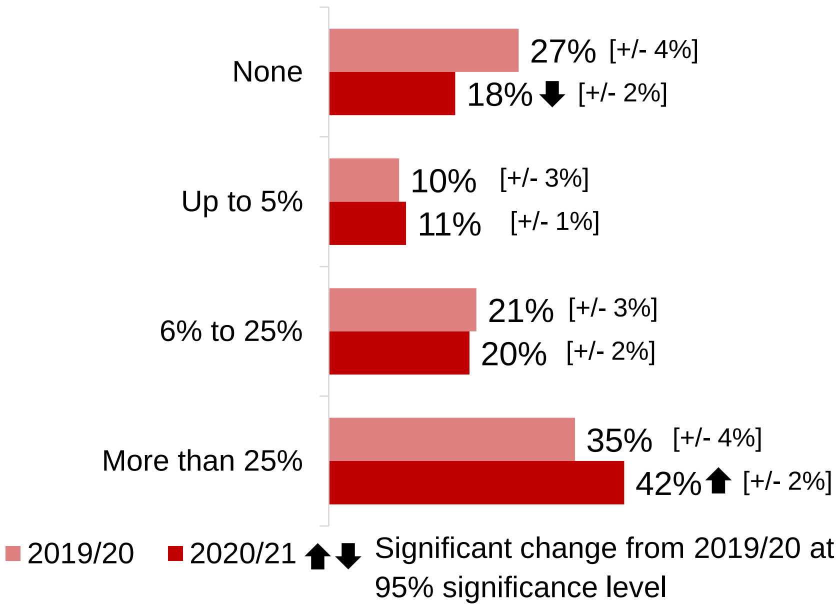
Two in five businesses (42%) reported that more than a quarter of their turnover came from exporting, up from the previous year (35% in 2019/20).

Chart 3.6.10 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used Webinars (excluding Don't know/Refused) (n=1,573).

Chart 3.6.11 Proportion of turnover from exporting



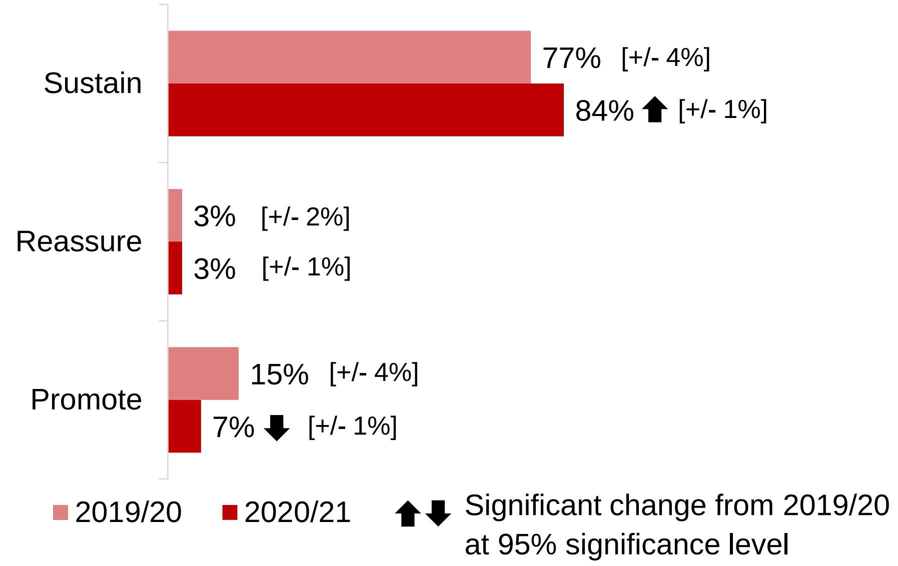
Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Webinars (n=2,378).

Current exporters made up the majority of businesses using the Webinars service. More than eight in ten businesses (84%) were currently exporting ('Sustain'), up from the previous year (77% in 2019/20). Seven percent had never exported before ('Promote'), down from the previous year (15% in 2019/20).

When comparing the findings across the three different types of webinars, four in five (80%) Standard Webinars and COVID-19 Webinars users were currently exporting, compared to nine in ten (90%) EU Exit Webinars users.

Only three percent of all Webinars users had exported before but not in the past twelve months ('Reassure'), unchanged from the previous year[52].

Chart 3.6.12 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Webinars (n=2,378).

Former exporters using the Webinars service were less likely to have plans to export again. Just over four in ten (44%) of those that were not currently exporting (but had done so previously) reported planning to export in the next twelve months, down from the previous year (58% in 2019/20). When comparing the findings across the three different types of webinars, around half of Standard Webinars and COVID-19 Webinars former-exporter users (51% and 47% respectively) reported planning to export in the next twelve months, compared to three in ten (30%) EU Exit Webinars former-exporter users.

A third of all Webinars users had no plans to export again (35%), up from the previous year (13% in 2019/20). When comparing the findings across the three different types of webinars, three in ten (29%) Standard Webinars and a quarter (24%) of COVID-19 Webinars former-exporter users said they had no plans to export again, compared to just over half (53%) of EU Exit Webinars former-exporter users.

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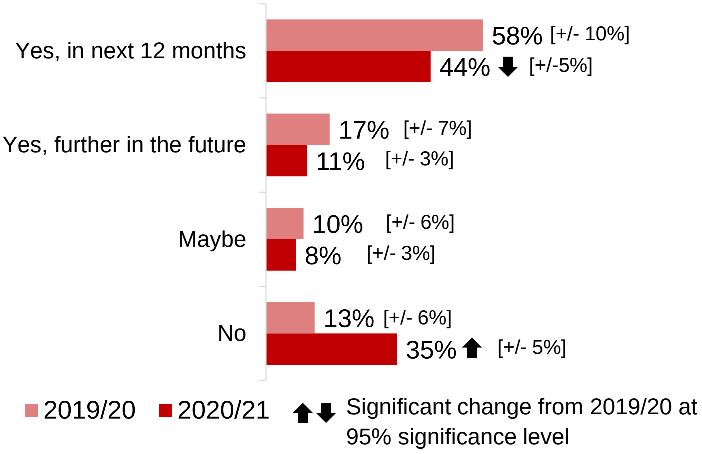
[52] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

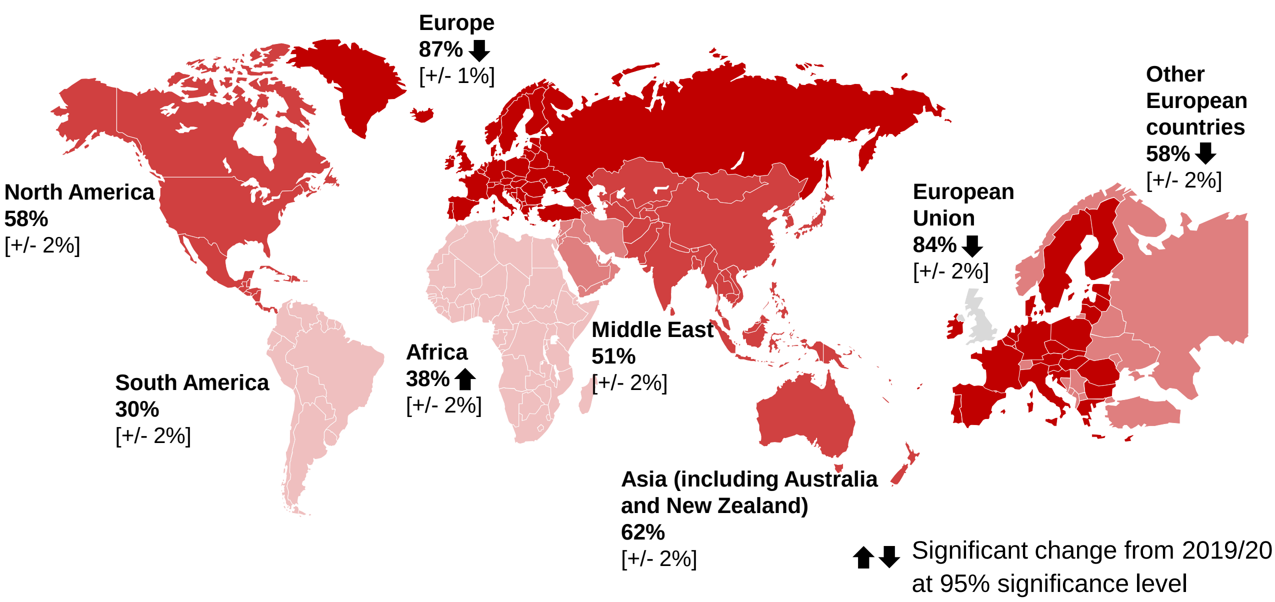
Chart 3.6.13 Non-exporter plans to sell overseas



Qexportfuture – And do you plan to sell goods or services overseas in the future? Base: All respondents who used Webinars and who are not currently exporting but have previously sold goods or services overseas (n=420).

Among those who were currently exporting or had done so previously, Europe remained the most common export market among Webinars users, although the proportion of users exporting to Europe fell compared to the previous year (from 91% to 87%). More than eight in ten (84%) exported to the European Union (down from 89% in the previous year), followed by Asia (62%), North America (58%), non-EU European countries (also 58%, down from 63% in the previous year), the Middle East (51%) and Africa (38%, up from 32%).

Chart 3.6.14 Regions organisations export to or exported to previously – Webinars



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Webinars and who have exported (n=2,073).

Table 3.6.2 Regions organisations export to or exported to previously – Webinars

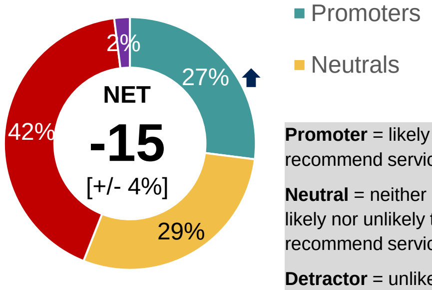
	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	91%	3%	87%	1%	↓
European Union	89%	3%	84%	2%	↓
Other European countries	63%	4%	58%	2%	↓
Asia (including Australia and New Zealand)	64%	4%	62%	2%	-
North America	60%	5%	58%	2%	-
Middle East	51%	5%	51%	2%	-
Africa	32%	4%	38%	2%	↑
South America	32%	4%	30%	2%	-

↑↓ Significant change from 2019/20 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Webinars and who have exported (n=2,073).

Summary: Export Opportunities

Net Promoter Score



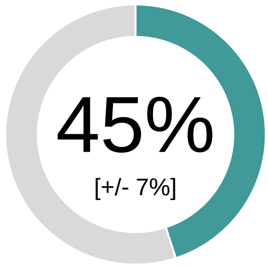
2019/20: -34
[+/- 5%]

Promoter = likely to recommend service

Neutral = neither likely nor unlikely to recommend service

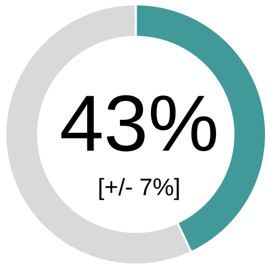
Detractor = unlikely to recommend service

Overall service met needs



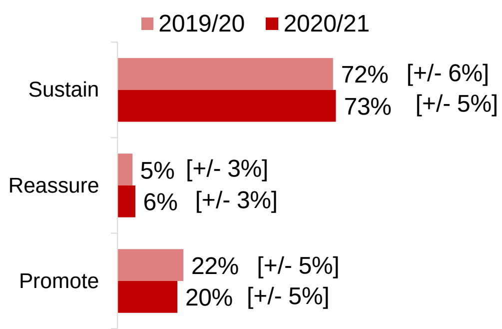
2019/20: 38%
[+/- 7%]

Satisfaction with service



2019/20: 40%
[+/- 7%]

Exporter status



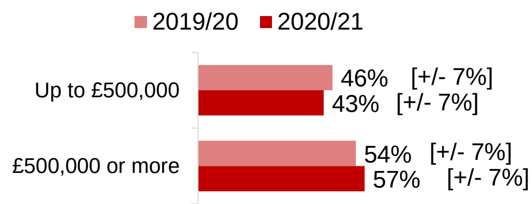
Sustain = current exporters

Reassure = exported before but not in the last 12 months

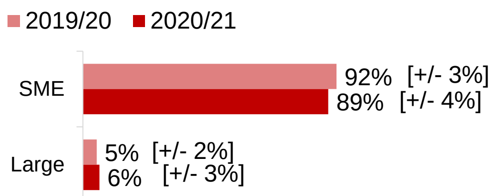
Promote = not exported before

Significant change from 2019/20 at 95% significance level

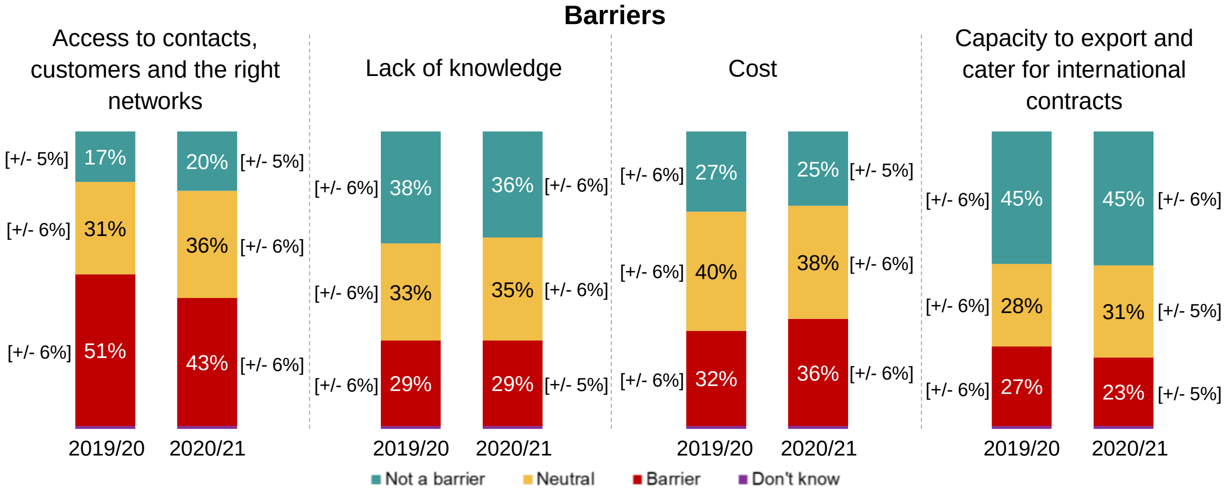
Turnover



Size



Barriers



3.7. Export Opportunities

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

This chapter explores satisfaction with the Export Opportunities service, actions taken as a result of using the service, and the exporting profile of service users. The findings are based on interviews with 304 businesses that used Export Opportunities between April 2020 and March 2021.

Key changes since 2019/20:

The NPS for Export Opportunities was -15, which was in line with -34 in the previous year.

The likelihood of businesses recommending the Export Opportunities service ('Promoters'[53]) increased this year (27% compared to 16% in 2019/20). As a result of using this service, more businesses said they had researched the paperwork and regulations needed to export (48% compared to 38% in 2019/20).

There were some differences in the exporting status of businesses that had used Export Opportunities compared to the previous year. Fewer users exported to Europe (68% compared to 78% in 2019/20), and this applied both to exports to the European Union (64% compared with 74% in 2019/20) and non-EU countries (37% compared with 48%).

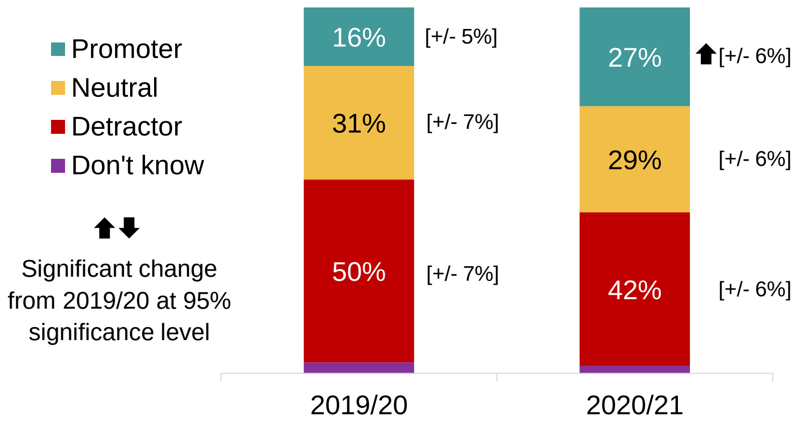
3.7.1. Satisfaction with the Export Opportunities service

3.7.1.1 Service performance

More businesses were negative than positive about the Export Opportunities service when asked if they were likely to recommend it to colleagues and business associates. Around a quarter (27%) were 'Promoters', i.e. likely to recommend the service, while four in ten (42%) were 'Detractors', i.e. unlikely to recommend the service[54]. However, comparison with findings from the previous year showed that the likelihood of recommending the Export Opportunities service increased this year (27% compared to 16% in 2019/20).

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

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



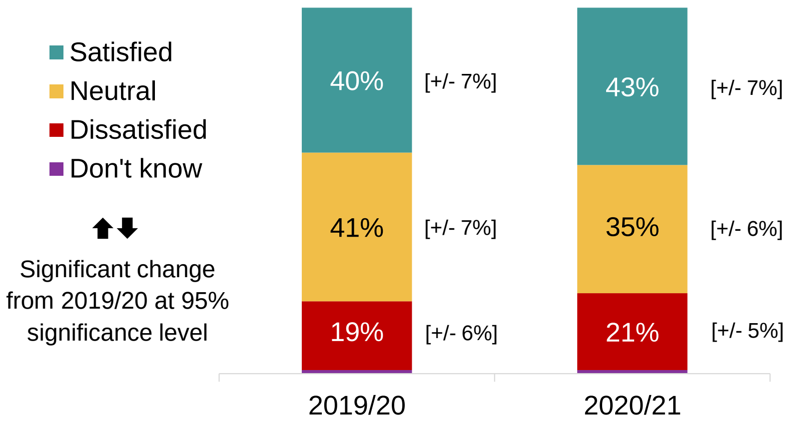
Qlikrec – Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used Export Opportunities (n=304).

One in five businesses felt that the service **could be improved** by having support that was more tailored or relevant to their industry or sector (19%). Around one in ten suggested the service could provide better networking opportunities or higher quality leads (13%), could have offered more information, advice or guidance (9%), or could have offered more feedback, follow-up or aftercare (also 9%). A quarter of businesses (25%) could not think of any ways in which the service could be improved[55].

3.7.1.2 Satisfaction

Satisfaction with Export Opportunities remained in line with the previous year. Around four in ten respondents (43%) said they were satisfied with their experience, while two in ten (21%) said they were dissatisfied[56].

Chart 3.7.2 Satisfaction with service - Export Opportunities



Qsatis – Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service? Base: All respondents who used Export Opportunities (excluding 'not applicable' responses) (n=300).

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[55] When asked how the service could be improved, 19% said Don't know, 4% said Nothing, no improvement needed or the service was fine as it is, and 2% had no answer or no comment.

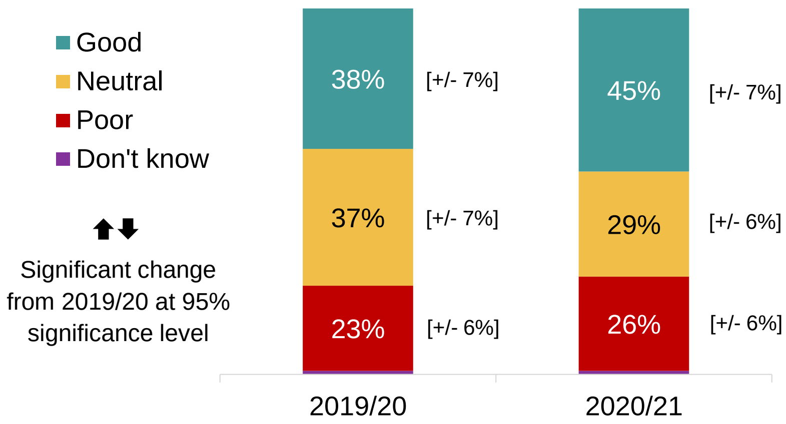
[56] Respondents answered on a scale of 0 (very dissatisfied) to 10 (very satisfied). Satisfied = 7-10; Neutral = 4-6; Dissatisfied = 0-3.

Of the 60 business that were dissatisfied with the service (i.e. they rated the service as poor), 26 (43%) reported that their **reason for dissatisfaction** was feeling that the service did not do anything for them or did not help them, and 16 (27%) reported that the service did not give them enough information or advice.

3.7.1.3 Whether overall service met needs

There were mixed views from businesses on whether the Export Opportunities service had met their needs; just under half (45%) rated it as good, and a quarter (26%) rated it as poor[57]. These findings were in line with the previous year.

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



Qqualinfo – Using that same scale, how would you rate … the extent to which the overall service received met your needs? Base: All respondents who used Export Opportunities (excluding 'not applicable' responses) (n=291).

Businesses were most positive about staff knowledge (63%) and how clear the steps were that they needed to take when using the service (61%). More than half were positive about the clarity of steps needed after using the service (56%) and the amount of time taken to receive information (55%). Businesses were least positive about the quality of contacts they were provided with (41%)[58]. These findings were in line with the previous year, except fewer businesses gave neutral ratings about the clarity of the steps they should take next after using the service (25% compared to 38% in 2019/20).

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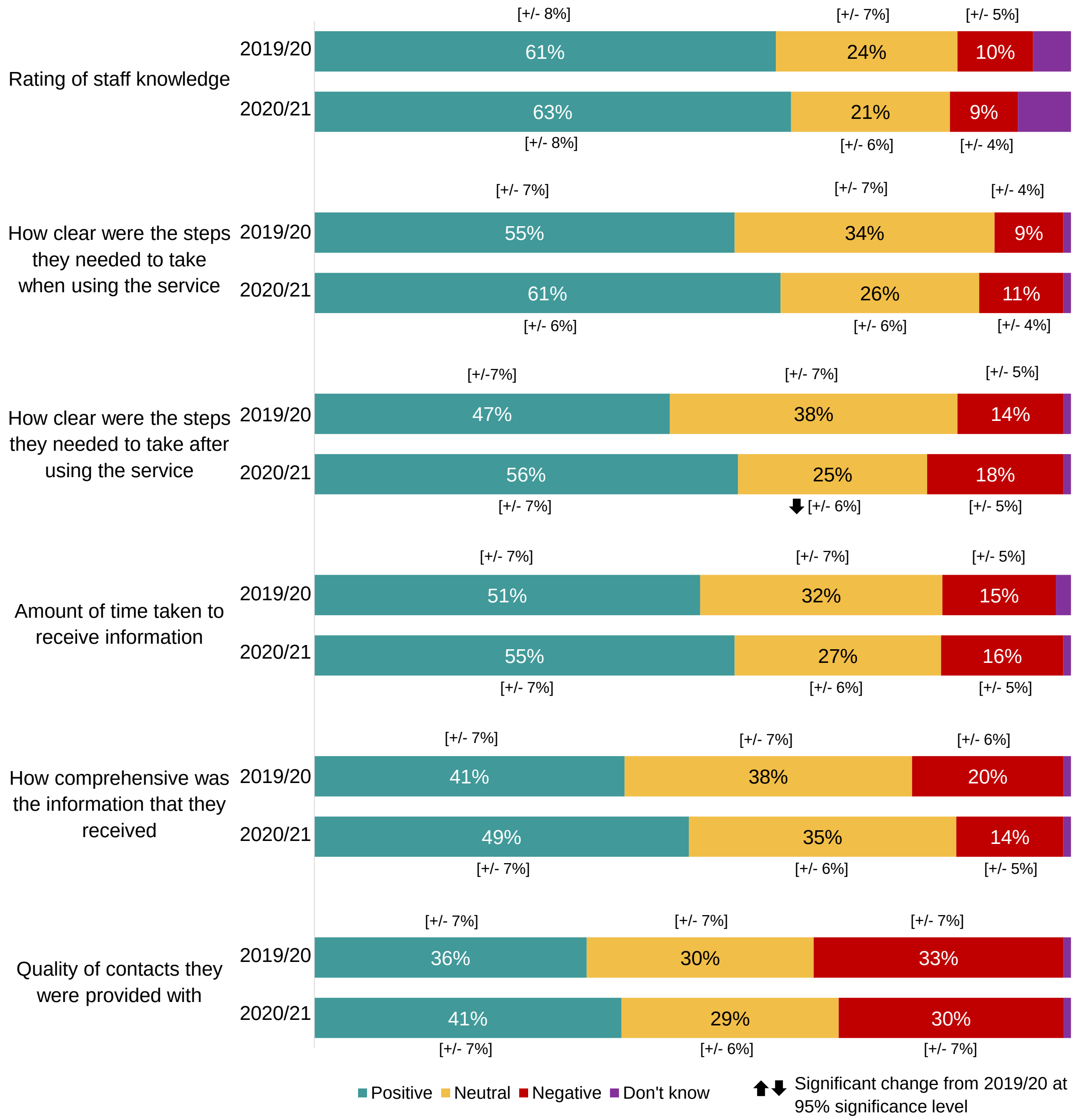
[57] Respondents answered on a scale of 0 to 10. Good = 7-10; Neutral = 4-6; Poor = 0-3.
[58] Respondents answered on a scale of 0 to 10. Positive = 7-10; Neutral = 4-6; Negative = 0-3.

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



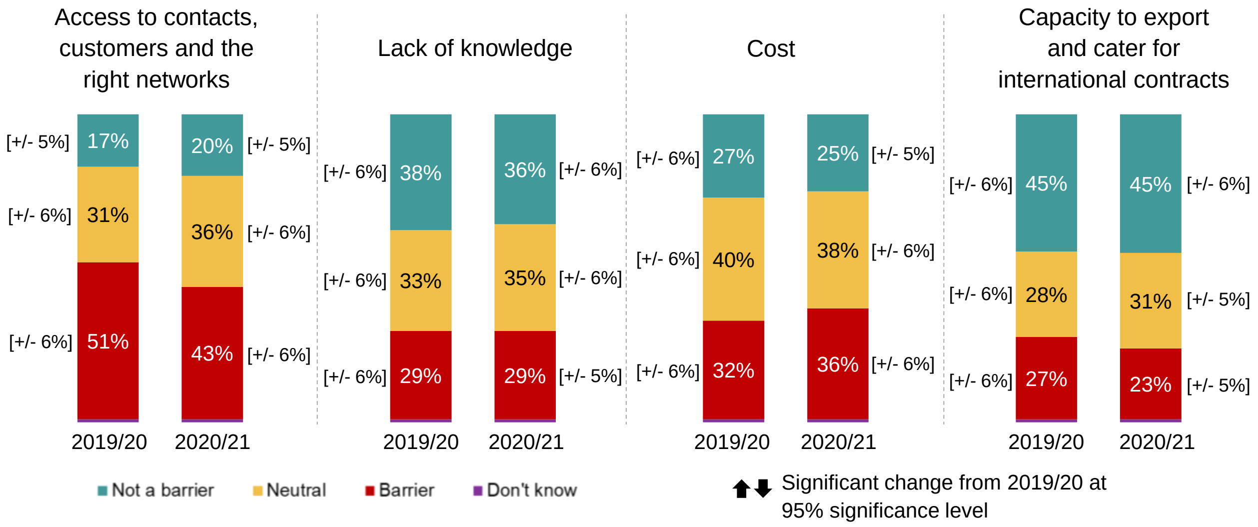
Qknowstaff – How would you rate the knowledge of staff at this service using the same scale as before? (n=214). Qtimetaken – How acceptable was time taken to receive the information or support you required from the service? (n=274). Qclarity_1 – The service made clear the steps I needed to take when I was using it (n=294). Qcomp – Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (n=283). Qclarity_2 – The service made clear what I should do next after using it (n=291). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (n=256). Base: All respondents that used each service (excluding 'not applicable' responses).

3.7.2. Outcomes of using the Export Opportunities service

3.7.2.1 Counteracting the barriers to exporting

Businesses that used the Export Opportunities service reported facing barriers to exporting[59]. Around four in ten (43%) reported access to networks was a barrier, while around a third (36%) said that cost was a barrier. Users were less likely to perceive lack of knowledge (29%) or their capacity to export (23%) as barriers. These findings were in line with the previous year.

Chart 3.7.5 Barriers to exporting – Export Opportunities



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export Opportunities (excluding 'not applicable' responses) (ranging from n=300-302).

Businesses were asked whether using Export Opportunities (and therefore DIT services) had helped them to **overcome these barriers** to exporting. Around four in ten businesses (38%) reported that using Export Opportunities had helped to increase their knowledge of export opportunities, while a quarter (25%) said that using the service had helped them to build overseas contacts or networks. These findings were in line with the previous year.

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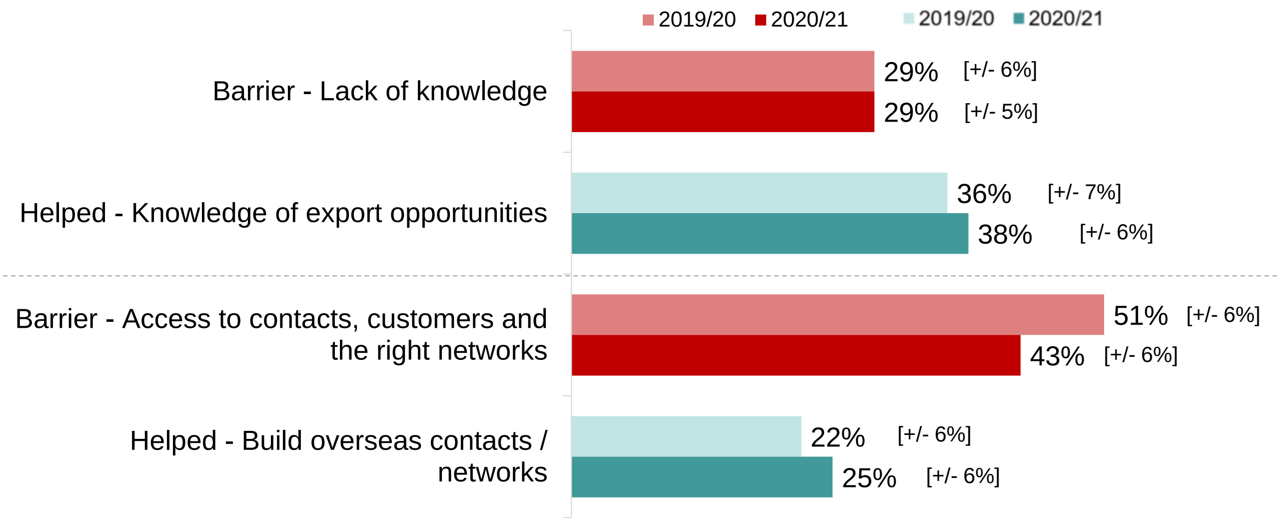
[59] Businesses were asked about four barriers to exporting that are captured in DIT's National Survey of Registered Businesses (NSRB): https://www.gov.uk/government/statistics/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020

Chart 3.7.6 Barriers to exporting and how DIT helped – Export Opportunities



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export Opportunities (excluding 'not applicable' responses) (ranging from n=300 to n=302).
Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to … increase your knowledge of the process of exporting / build overseas contacts and networks. Base: All respondents who used Export Opportunities (n=304).

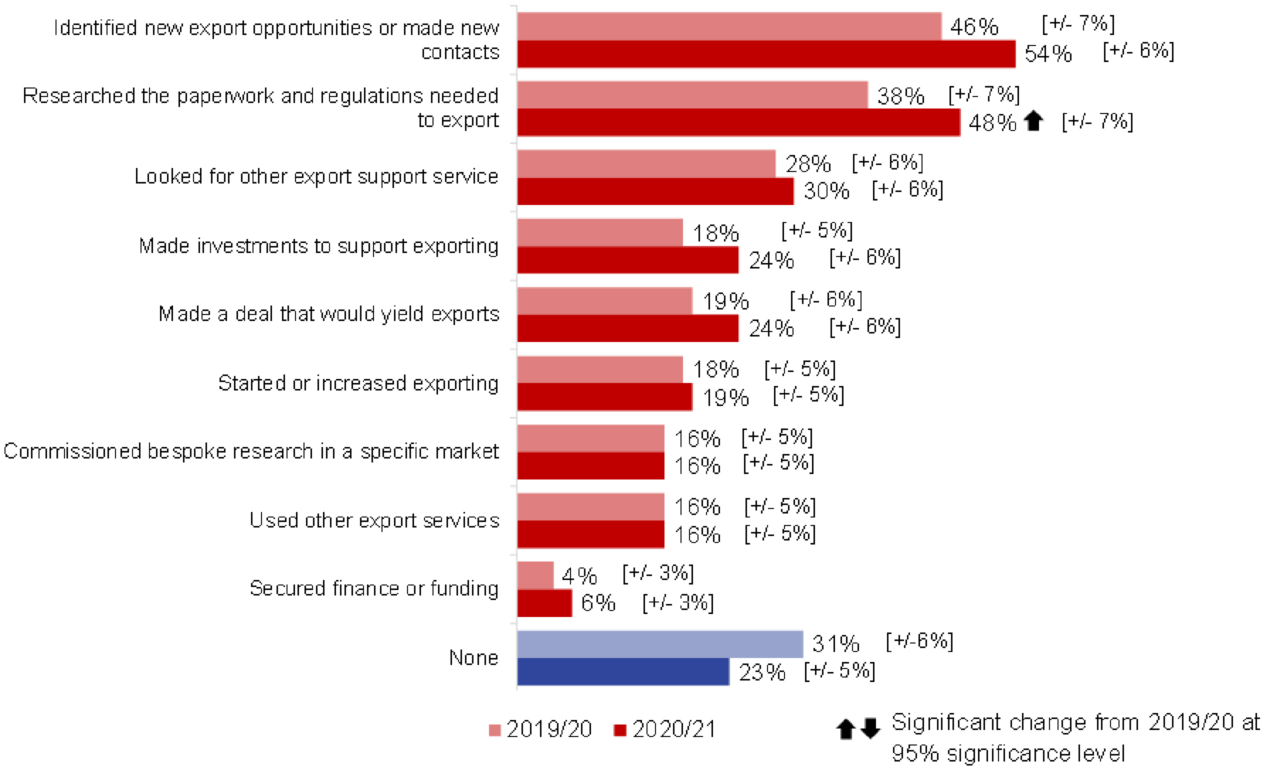
3.7.2.2 Taking action

Businesses had taken a range of actions as a result of using Export Opportunities. Six in ten businesses[60] (62%) that were not exporting at the time of using the service, had assessed the company's readiness to export. Among all businesses, just over half (54%) said they had identified new export opportunities or made new contacts, while around half (48%) had researched the paperwork and regulations needed to export. Three in ten (30%) had looked for other export support services.

The proportion of businesses saying they had researched the paperwork and regulations needed to export increased compared to the previous year (48% compared to 38% in 2019/20).

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

Chart 3.7.7 Actions taken as a result of service interaction - Export Opportunities

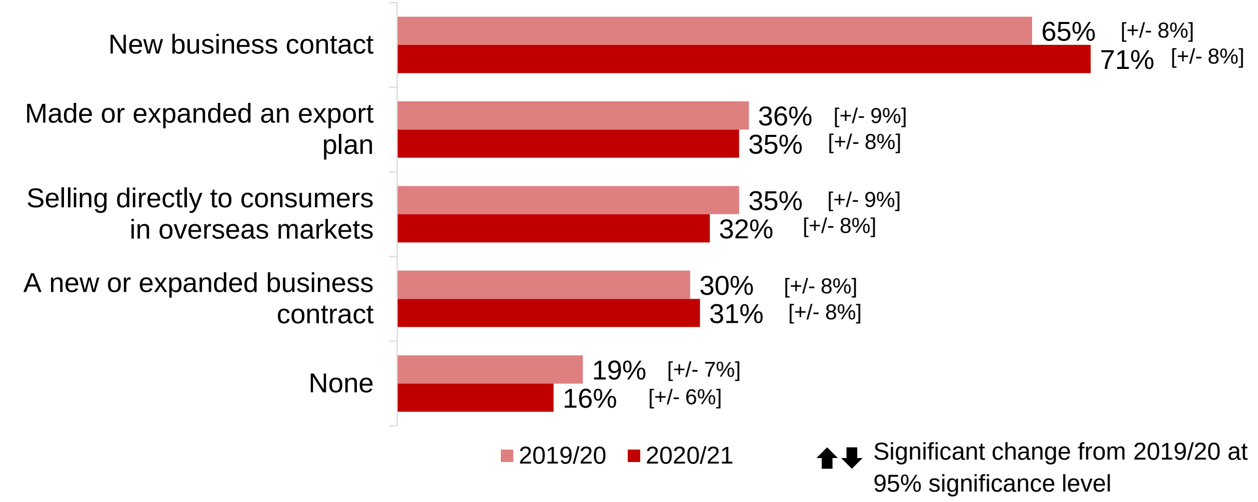


Qresult – What has your business done as a result of [SAMPLED SERVICE]? Only answers given by more than 2% of respondents are shown. Base: All respondents who used Export Opportunities (n=304).

3.7.2.3 Identifying new opportunities

As a result of using Export Opportunities, businesses reported identifying new export opportunities. They were most likely to say they had identified new business contacts (71%), while around a third had made or expanded an export plan (35%) or sold directly to consumers in overseas markets (32%). Three in ten had made a new or expanded business contract (31%). These findings were in line with the previous year (2019/20).

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



Qresult_opps – Which of the following opportunities, if any, has your business identified. Base: All respondents that used Export Opportunities who had identified a new business contact as part of the DIT service (n=181).

Among businesses that had identified a new business contact as part of the DIT service, around six in ten (57%) had made contact with a buyer, while four in ten (41%) had made contact with a distributor.

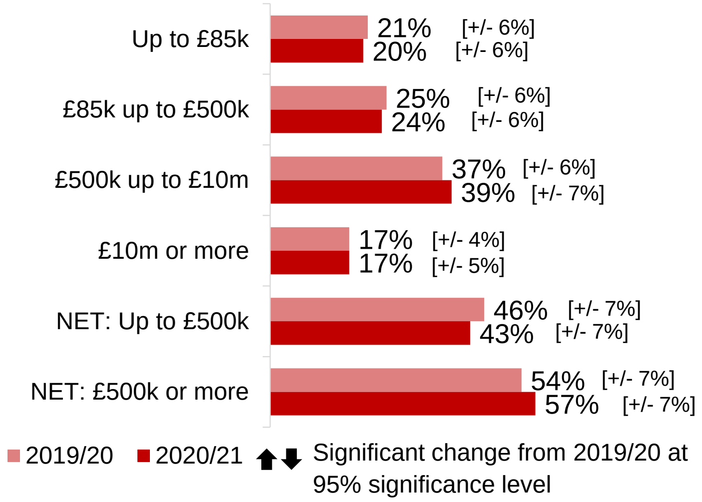
3.7.2.4 Making investments

Overall, a total of 69 businesses had invested in exporting after using the Export Opportunities service. Among these, 48 (69%) had made a Research and Development investment, and 35 (51%) had made capital investments.

3.7.3. Service use by firmographics and export behaviour

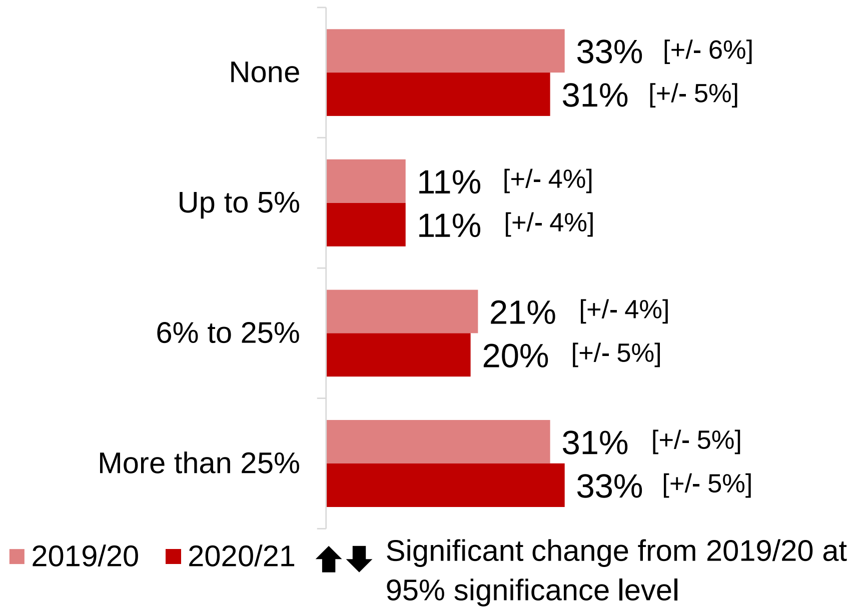
Use of the Export Opportunities service was split between businesses with high turnovers of £500,000 or more (57%) and those with lower turnovers (43%), in line with the previous year. A third of businesses (33%) reported that more than a quarter of their turnover came from exporting, again in line with 2019/20.

Chart 3.7.9 Turnover



Qturnover – What is your annual turnover in the UK (i.e. excluding any overseas sites of multinational companies)? Base: All respondents who used Export Opportunities (excluding Don't know/Refused) (n=215).

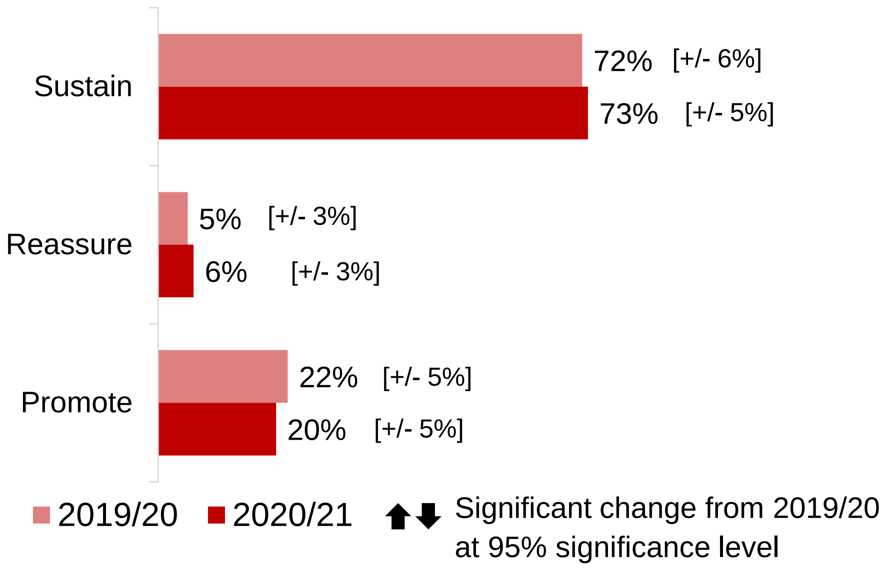
Chart 3.7.10 Proportion of turnover from exporting



Qturnexp – In the last year, approximately what percentage of your business' turnover was accounted for by exports? Base: All respondents who used Export Opportunities (n=304).

Current exporters made up the majority of businesses using the Export Opportunities service. Almost three-quarters of businesses (73%) were currently exporting ('Sustain'), although two in ten (20%) had never exported before ('Promote'). Only six percent had exported before but not in the past 12 months ('Reassure')[61]. These findings were in line with the previous year.

Chart 3.7.11 Exporter status



Qexportstatus – At the time of your dealing with [SERVICE] in [MONTH] [YEAR] was your business already selling goods or services overseas? Qexportstatus2 – And did you sell goods or services overseas in the 12 months before that? That is the twelve months prior to [MONTH] [YEAR]? Base: All respondents that used Export Opportunities (n=304).

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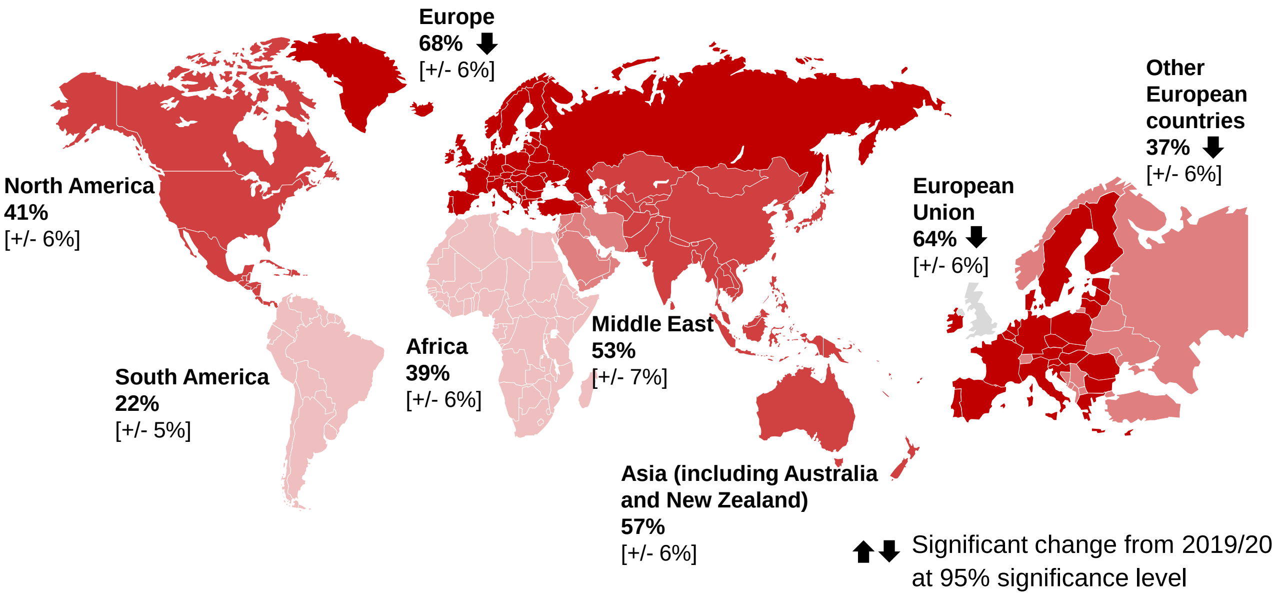
[61] Sustain = current exporters; Reassure = exported before but not in the last 12 months; Promote = not exported before.

Europe remained the most common export market among Export Opportunities users, although this represented a decline from the previous year (68% compared to 78% in 2019/20). Among those who were currently exporting or had done so previously, almost two-thirds (64%) exported to the European Union (compared to 74% in 2019/20), followed by Asia (57%), the Middle East (53%), North America (41%), Africa (39%) and other non-EU European countries (37% compared to 48% in 2019/20).

Chart 3.7.12 Regions organisations export to or exported to previously – Export Opportunities



Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Export Opportunities and who have exported (n=243).

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

	2019/20	CI (+/-)	2020/21	CI (+/-)	Change
Europe	78%	6%	68%	6%	↓
European Union	74%	5%	64%	6%	↓
Other European countries	48%	6%	37%	6%	↓
Asia (including Australia and New Zealand)	61%	7%	57%	6%	-
Middle East	59%	7%	53%	7%	-
North America	43%	7%	41%	6%	-
Africa	42%	7%	39%	6%	-
South America	22%	6%	22%	5%	-

↑↓ Significant change from 2019/20 at 95% significance level

Qcurexp – [Do you currently / Did you] export to any of the following regions? Base: All respondents who used Export Opportunities and who have exported (n=243).

4. Awareness and use of services

The survey also examined how businesses came to use DIT services; specifically, when they first used the service or product and how they first heard about DIT. It also assessed recall of advertising from the 'Exporting is GREAT' campaign.

4.1. When businesses first used the DIT service

The proportion of service users that were using a DIT (or UKTI) service for the first time was lower than the previous year for the majority of DIT services. The Business Profiles service continued to have the highest proportion of first-time service users (21%, down from 35% in 2019/20). In contrast, four in ten businesses using the OBNI service (41%) and the webinars service (38%) had started using a DIT service more than five years ago.

Key changes since 2019/20:

- A decrease in the proportion of Export and Investment Teams users that were using a DIT (or UKTI) service for the first time (9% compared to 17% in 2019/20) and within the last six months (2% compared to 8%).
- A decrease in the proportion of ITA users that were using a DIT (or UKTI) service for the first time (16% compared to 19% in 2019/20) and within the last six months (9% compared to 12%), and an increase in the proportion that first used a DIT service more than five years ago (32%, up from 25%).
- A decrease in the proportion of Missions users that were using a DIT (or UKTI) service for the first time (8% compared to 17% in 2019/20).
- A decrease in the proportion of OBNI users that were using a DIT (or UKTI) service for the first time (7% compared to 16% in 2019/20) and within the last six months (2% compared to 11%), and an increase in the proportion that first used a service more than five years ago (41%, up from 22%).
- An increase in the proportion of OMIS users that first used a DIT (or UKTI) service 6-12 months ago (24%, up from 8%), and a decrease in the proportion that first used a service more than five years ago (13%, down from 29%).
- A decrease in the proportion of webinars users that were using a DIT (or UKTI) service for the first time within the last six months (5% compared to 8% in 2019/20) and 1-2 years ago (9% compared to 15%), and an increase in the proportion that first used a service more than five years ago (38%, up from 27%).
- A decrease in the proportion of Export Opportunities service users that first used a DIT (or UKTI) service within the last six months (4% compared to 10% in 2019/20), and an increase in the proportion that first used a DIT (or UKTI) service 6-12 months ago (16%, up from 8%).
- A decrease in the proportion of Business Profiles users that were using a DIT (or UKTI) service for the first time (21% compared to 35% in 2019/20) or using a service for the first time within the last six months (14% compared to 16%) and 1-2 years ago (3% compared to 5%), and an increase in the proportion that first used a service more than five years ago (17%, up from 11%).

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

Non-Digital Service	E&I Teams 19/20	E&I Teams 20/21	Significant Change	ITAs 19/20	ITAs 20/21	Significant Change
This was the first time	17%	9%	↓	19%	16%	↓
Within the last 6 months	8%	2%	↓	12%	9%	↓
6-12 months ago	8%	10%	-	8%	10%	-
1-2 years ago	11%	11%	-	9%	10%	-
2-5 years ago	17%	23%	-	18%	18%	-
More than 5 years ago	32%	37%	-	25%	32%	↑
Don't know	7%	8%	-	8%	5%	↓
Unweighted base	308	113	-	2,402	1,526	-

Non-Digital Service	Missions 19/20	Missions 20/21	Significant Change	OBNI 19/20	OBNI 20/21	Significant Change
This was the first time	17%	8%	↓	16%	7%	-
Within the last 6 months	5%	4%	-	11%	2%	-
6-12 months ago	10%	17%	-	15%	11%	-
1-2 years ago	16%	18%	-	10%	13%	-
2-5 years ago	19%	22%	-	18%	20%	-
More than 5 years ago	22%	22%	-	22%	41%	-
Don't know	10%	8%	-	9%	7%	↓
Unweighted base	189	143	-	198	127	-

Non-Digital Service	Missions 19/20	Missions 20/21	Significant Change	OBNI 19/20	OBNI 20/21	Significant Change
This was the first time	17%	8%	↓	16%	7%	↓
Within the last 6 months	5%	4%	-	11%	2%	↓
6-12 months ago	10%	17%	-	15%	11%	-
1-2 years ago	16%	18%	-	10%	13%	-
2-5 years ago	19%	22%	-	18%	20%	-
More than 5 years ago	22%	22%	-	22%	41%	↑
Don't know	10%	8%	-	9%	7%	-
Unweighted base	189	143	-	198	127	-

Non-Digital Service	Posts 19/20	Posts 20/21	Significant Change
This was the first time	13%	11%	-
Within the last 6 months	9%	7%	-
6-12 months ago	8%	10%	-
1-2 years ago	10%	12%	-

Digital Service	Webinars 19/20	Webinars 20/21	Significant Change	Export Opportunities 19/20	Export Opportunities 20/21	Significant Change
This was the first time	14%	13%	-	21%	16%	-
Within the last 6 months	8%	5%	↓	10%	4%	↓
6-12 months ago	8%	9%	-	8%	16%	↑
1-2 years ago	15%	9%	↓	13%	14%	-
2-5 years ago	19%	17%	-	20%	20%	-
More than 5 years ago	27%	38%	↑	16%	23%	-
Don't know	9%	9%	-	11%	6%	-
Unweighted base	423	2378	-	297	304	-

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

4.2. How businesses first heard about DIT

For all services or products, the most frequent way of finding out about DIT was through contacts in the private sector, with the highest proportion being among users of the OMIS service (28%), followed by the Missions service (27%) and Posts (25%).

Key changes since 2019/20:

- An increase in the proportion of Export and Investment Teams users that first heard about DIT through the great.gov.uk website (3%) and the ‘Exporting is GREAT’ advertising campaign (2%), neither of which were cited in 2019/20.
- An increase in the proportion of ITAs users that first heard about DIT through contacts in the private sector (23%, up from 17% in 2019/20) and through a UK trade fair (4%, up from 3%).
- An increase in the proportion of Missions users that first heard about DIT through contacts in the public sector (18%, up from 10% in 2019/20) and through articles or information that they had seen or read (4%, up from 1%).
- An increase in the proportion of OMIS users that first heard about DIT through contacts in the public sector (24%, up from 4% in 2019/20).
- An increase in the proportion of Posts users that first heard about DIT through contacts in the private sector (25%, up from 18% in 2019/20), and a decrease in the proportion that first heard about DIT through a direct call from an ITA (3%, down from 4%).
- An increase in the proportion of webinars users that first heard about DIT through articles or information that they had seen or read (5%, up from 1% in 2019/20) or through the great.gov.uk website (3%, up from 1%).

- An increase in the proportion of Export Opportunities users that first heard about DIT through a UK trade fair (5%, up from 1%).

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

Non-Digital Service	E&I Teams 19/20	E&I Teams 20/21	Significant Change	ITAs 19/20	ITAs 20/21	Significant Change
Contacts in the private sector	20%	19%	-	17%	23%	↑
Contacts in the public sector	13%	14%	-	11%	12%	-
Articles / information seen or read	*	2%	-	1%	2%	-
Exporting is GREAT advertising campaign	-	2%	↑	1%	1%	-
great.gov.uk website	-	3%	↑	2%	3%	-
Searched online	5%	4%	-	8%	10%	-
Direct call from an ITA	4%	4%	-	5%	6%	-
Exporting is GREAT truck	-	-	-	-	*	-
UK trade fair	6%	8%	-	3%	4%	↑
Overseas trade fair	1%	1%	-	1%	1%	-
Unweighted base	308	113	-	2,402	1,526	-

Non-Digital Service	Missions 19/20	Missions 20/21	Significant Change	OBNI 19/20	OBNI 20/21	Significant Change
Contacts in the private sector	22%	27%	-	19%	20%	-
Contacts in the public sector	10%	18%	↑	11%	10%	-
Articles / information seen or read	1%	4%	↑	1%	4%	-
Exporting is GREAT advertising campaign	1%	1%	-	-	-	-
great.gov.uk website	*	1%	-	1%	4%	-
Searched online	2%	4%	-	9%	9%	-
Direct call from an ITA	4%	2%	-	3%	4%	-
Exporting is GREAT truck	-	-	-	-	-	-
UK trade fair	7%	4%	-	4%	1%	-
Overseas trade fair	2%	1%	-	-	1%	-
Unweighted base	189	143	-	198	127	-

Non-Digital Service	Posts 19/20	Posts 20/21	Significant Change
Contacts in the private sector	18%	25%	↑
Contacts in the public sector	14%	15%	-
Articles / information seen or read	1%	2%	-
Exporting is GREAT advertising campaign	*	*	-
great.gov.uk website	1%	2%	-
Searched online	7%	9%	-
Direct call from an ITA	4%	3%	↓
Exporting is GREAT truck	-	-	-

Digital Service	Webinars 19/20	Webinars 20/21	Significant Change	Export Opportunities 19/20	Export Opportunities 20/21	Significant Change
Contacts in the private sector	22%	23%	-	16%	18%	-
Contacts in the public sector	10%	12%	-	8%	9%	-
Articles / information seen or read	1%	5%	↑	2%	2%	-
Exporting is GREAT advertising campaign	2%	1%		1%	2%	-
great.gov.uk website	1%	3%	↑	3%	4%	-
Searched online	9%	8%	-	20%	19%	-
Direct call from an ITA	3%	3%	-	3%	3%	-
Exporting is GREAT truck	-	-	-	-	*	-
UK trade fair	3%	3%	-	1%	5%	↑
Overseas trade fair	1%	1%	-	*	2%	-
Unweighted base	423	2378	-	297	304	-

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

4.3. Awareness of ‘Exporting is GREAT’ advertising campaign

The majority of businesses across all services or products said that they recalled seeing advertising from the ‘Exporting is GREAT’ campaign. Users of Export and Investment Teams (77%) and OBNI (72%) were the most likely to say that they recalled seeing any advertising from the campaign.

Key changes since 2019/20:

- An increase in the proportion of Export and Investment Teams users saying they recalled seeing advertising from the ‘Exporting is GREAT’ campaign (77%, up from 67% in 2019/20).
- An increase in the proportion of OBNI users saying they recalled seeing advertising from the ‘Exporting is GREAT’ campaign (72%, up from 57% in 2019/20).
- An increase in the proportion of Export Opportunities users saying they did not recall seeing advertising from the ‘Exporting is GREAT’ campaign (43%, up from 33% in 2019/20).

Table 4.3.1 Whether businesses recalled seeing any advertising from the ‘Exporting is GREAT’ campaign, by product or service

Non-Digital Service	E&I Teams 19/20	E&I Teams 20/21	Significant Change	ITAs 19/20	ITAs 20/21[62]	Significant Change
Yes	67%	77%	↑	56%	56%	-
No	31%	21%	↓	42%	42%	-
Don't know	1%	2%	-	2%	2%	-
Unweighted base	308	113	-	2,402	1,526	-

Non-Digital Service	Missions 19/20	Missions 20/21	Significant Change	OBNI 19/20	OBNI 20/21	Significant Change
Yes	61%	65%	-	57%	72%	↑
No	37%	35%	-	41%	26%	↓
Don't know	2%	-	-	2%	1%	-
Unweighted base	189	143	-	198	127	-

Non-Digital Service	Posts 19/20	Posts 20/21	Significant Change
Yes	60%	64%	-
No	38%	35%	-
Don't know	2%	1%	-
Unweighted base	765	622	-

Digital Service	Webinars 19/20	Webinars 20/21	Significant Change	Export Opportunities 19/20	Export Opportunities 20/21	Significant Change
Yes	59%	59%	-	64%	56%	-

[62] ITA 19/20 and 20/21 percentages are exactly the same.

No	38%	39%	-	33%	43%	↑
Don't know	3%	2%	↓	3%	1%	-
Unweighted base	423	2378	-	297	304	-

QDITad – DIT has been running an advertising campaign which included the slogan 'Exporting is GREAT' and talked about the global demand for UK goods and services. The campaign appeared on TV, radio, posters, newspapers, magazines and online. Do you recall seeing any of this advertising in the past couple of years? Base: All respondents.

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