Department for Business & Trade

Export client quality survey for businesses supported April 2019 to March 2020

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KANTAR

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

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Research contractor: Kantar's Public Division, London UK

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1. Introduction

1.1. Background and objectives

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

The Export Strategy 2018[1] is based on:

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

The main aims of the Export Client Survey (ECS) are:

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

Additionally, the ECS is also used to create a 'longitudinal pipeline' – a new central dataset capturing all recorded service interactions between beneficiary companies and DIT.

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

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

This report presents findings from the 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 2019 and March 2020 (2019/20). The findings from the Quality Survey interviews with businesses who used DIT services between April 2018 and March 2019 has been published[2] (2018/19). Throughout this report findings from businesses that used DIT services in 2019/20 are compared to findings from 2018/19.

[1] Export Strategy 2018
[2] DIT Export Client Quality Survey 2018 to 2019

1.2. Report coverage

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

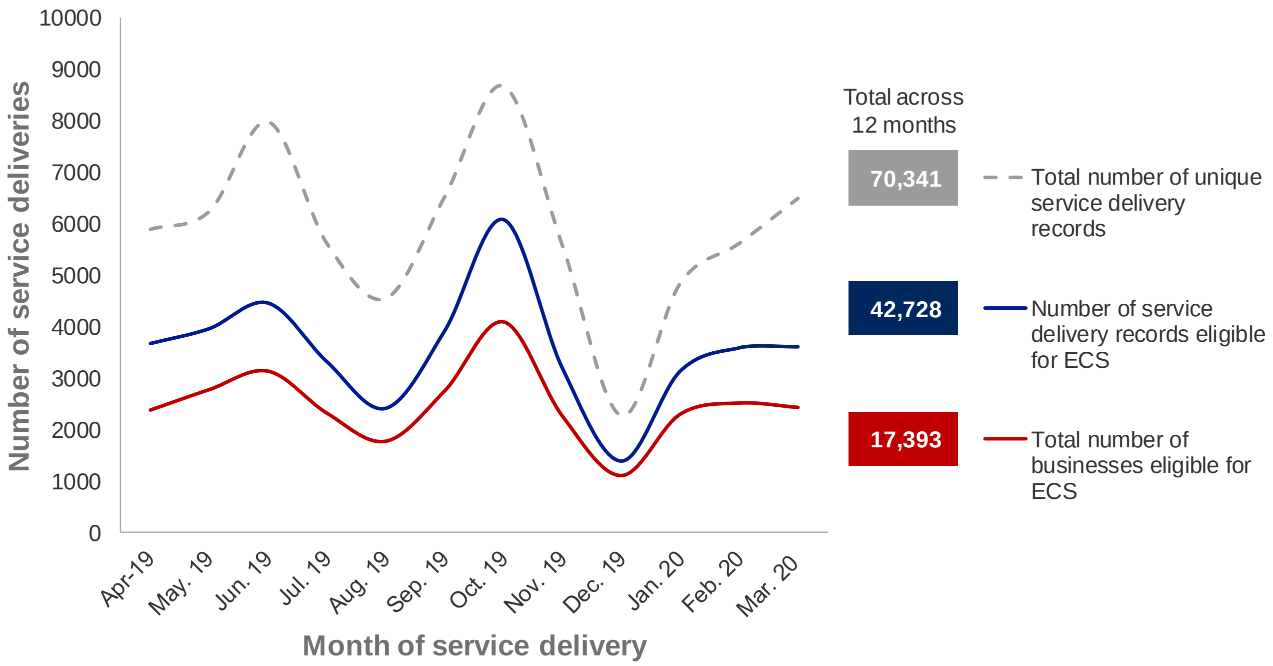
Bespoke offers and face to face support
Tradeshow Access Program (TAP)
International Trade Advisers (ITAs)
Missions
Overseas Business Network Initiative (OBNI)
Overseas Market Introduction Service (OMIS) (great.gov.uk)
Posts
Sector Teams
Universal Offer Digital and Events
Webinars
Export Opportunities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

Due to low sample sizes that would lead to issues around the accuracy and confidentiality of results, product finding chapters have not been provided for the following services: Selling Online Overseas (SOO), Overseas Market Introduction Service (OMIS) and Business Profiles.

1.3. Overview of number of services delivered and businesses supported

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

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



The most frequently used services were ITAs (c.15,000 records across about 8,500 businesses) and Posts (c. 11,0000 records across c. 5,000 businesses).

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

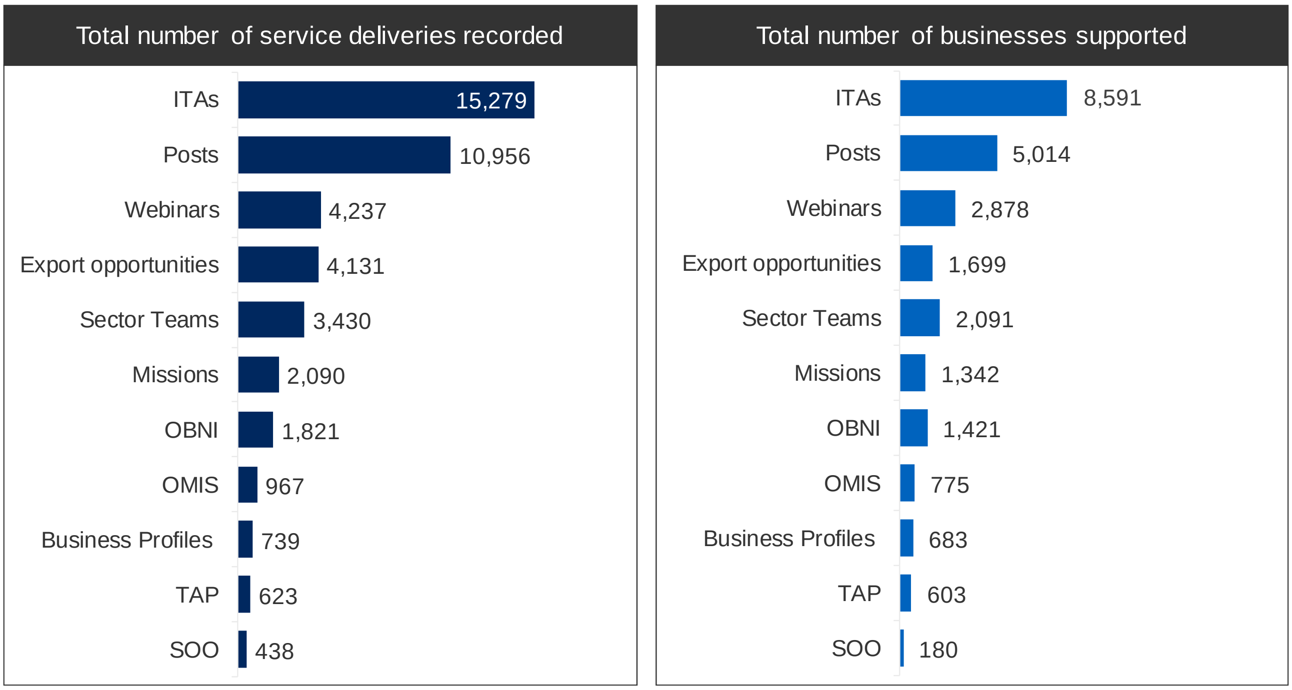


Table 1.3.1: Service delivery records received from DIT[3]

Month of service delivery	Apr. 19	May. 19	Jun. 19	Jul. 19	Aug. 19	Sep. 19	Oct. 19	Nov. 19	Dec. 19	Jan. 20	Feb. 20	Mar. 20	Total
Total number of records	5,897	6,245	7,985	5,620	4,556	6,533	8,679	5,579	2,279	4,847	5,623	6,498	70,341
Service deliveries eligible for ECS	**3,673**	**3,962**	4,460	3,317	2,412	3,922	6,084	3,189	1,385	3,135	3,585	3,604	42,728
Services													
TAP	50	50	40	35	<10	185	20	200	10	20	<10	<10	623
ITA	850	1,155	1,490	1,150	775	1,740	3,505	1,035	490	1,215	1,125	750	15,279
Missions	95	125	155	130	35	235	225	330	135	190	315	120	2,090
OBNI	<10	140	185	170	90	170	190	155	85	195	250	180	1,821
OMIS	90	105	125	65	25	80	120	75	80	70	95	50	967
Posts	775	795	975	795	870	890	1,395	1,075	495	690	1,125	1,075	10,956
Sector Teams	580	235	610	285	30	300	285	240	55	90	240	480	3,430
Webinars	530	950	475	195	125	200	165	125	15	465	260	740	4,237
Export opportunities	655	460	370	430	380	265	340	220	130	305	325	250	4,131
Business Profiles	95	40	125	150	50	25	40	45	20	50	55	50	739
SOO	50	40	65	45	65	35	20	25	<10	35	30	30	438

[3] For individual services, the monthly figures have been rounded to the nearest five given low counts in certain cells.

Table 1.3.2: Companies supported through services eligible for ECS[4]

Month of service delivery	Apr. 19	May. 19	Jun. 19	Jul. 19	Aug. 19	Sep. 19	Oct. 19	Nov. 19	Dec. 19	Jan. 20	Feb. 20	Mar. 20	Total across 12 months[5]
Total number of companies supported	**2,391**	**2,787**	**3,145**	**2,329**	**1,786**	**2,764**	**4,102**	**2,272**	**1,119**	**2,310**	**2,527**	**2,442**	**17,393**
Services													
TAP	50	50	40	35	<10	185	20	200	10	20	<10	<10	603
ITAs	700	970	1,245	935	650	1,390	2,590	875	440	1,030	915	645	8,591
Missions	40	110	115	85	30	160	180	230	100	140	280	110	1,342
OBNI	<10	140	185	170	90	170	185	150	85	190	245	175	1,421
OMIS	85	100	125	60	25	80	120	70	75	65	90	50	775
Posts	480	585	715	585	710	600	950	730	395	470	845	730	5,014
Sector teams	405	175	465	175	25	185	225	210	45	80	200	340	2,091
Webinars	445	725	400	175	115	185	145	110	15	395	230	565	2,878
Export opportunities	310	240	240	270	245	170	200	130	95	195	175	165	1,699
Business Profiles	90	40	125	145	50	25	40	40	20	50	50	40	683
SOO	15	20	20	20	20	15	15	<10	<10	20	25	15	180

4 For individual services, the monthly figures have been rounded to the nearest five given low counts in certain cells.
5 The sum of businesses over 12 months is less than the sum of each month because a proportion of businesses have multiple interactions over a year.

2. Methodology

2.1. 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 takes 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 – company names, email domains, postcodes and telephone numbers – were used to identify where multiple records referred to the same company. We then selected a monthly sample of businesses from these records, giving higher probabilities of selection to businesses receiving less common services. In this way, we aimed to maximise the number of interviews achieved regarding smaller services to facilitate more detailed analysis at the individual service level.

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; again, this was to increase the number of responses related to the least common services.

There is a three-month break period between when a business interacts with DIT and when the interview is conducted. Interactions in April 2019 are included within the July 2019 sample, interactions in May 2019 are included within the August 2019 sample etc. This is part of the survey design to ensure the interaction was recent enough to be memorable.

2.2. Analysis

Many of the questions in the survey asked respondents 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). Respondents could also say 'Don't know' or 'Not applicable'. Respondents who said the question did not apply to them were excluded from the analysis. Those who answered 'Don't know' or 'Refused' are included in the charts, unless no respondents gave this answer.

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

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

Charts and tables in the report also display the Confidence Interval (CI) for each survey estimate. When a survey is carried out, the respondents who take part are only a subset of those in the population and as such may not give an exact representation of the 'true' average in the population. When we get an estimate for a survey, we use 'Confidence Intervals' to account for the fact that we have interviewed this subset of the population. A 95% Confidence Interval is a margin of error around an estimate, which gives a range of values within which we can be 95% confident that the true number will be.

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.

2.2.1. Weighting

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

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

We calculated weights at two levels:

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

2.3. Fieldwork

Interviews were conducted using Computer-Assisted Telephone Interviewing (CATI). All respondents were sent a letter and/or email, prior to being contacted, to let them know the purpose of the research and provide them with an opportunity to contact Kantar Public to ask any questions or opt out of the research. Fieldwork for this report began in July 2019 (interviewing businesses who received support from DIT in April 2019. This report covers DIT services delivered between April 2019 and March 2020, although the majority of the report only focuses on the services listed in section 1.2. The average interview length was around 20 minutes between July 2019 and March 2020. This increased to around 25 minutes from April 2020 onwards as changes were made to the questionnaire to explore the impact of COVID-19 on exporting businesses.

2.3.1. Impact of COVID-19 on fieldwork

Interviews continued throughout the COVID-19 'lockdown' (March 2020 onwards). Minor changes were made to the survey invite letter and questionnaire introduction to appreciate the challenges businesses were going through. Additional questions were added to the survey to explore the impact on businesses and their exporting behaviour. The impact of lockdown on response rates is shown in section 2.4 below.

2.4. Response rates

Table 2.4.1 below shows response rates achieved for interviewing between July 2019 and June 2020 for businesses with interactions between April 2019 and March 2020.

We calculated the overall response rate using the American Association for Public Opinion Research standard definitions[6], an industry standard metric for calculating response rates. We achieved a 42% response rate for interviews conducted between July 2019 and June 2020[7].

Table 2.4.1 Fieldwork outcomes July 2019 to June 2020

Fieldwork outcomes	
	Number of cases *(N)*
Number of cases issued	15,071
Live sample – eligible but not interviewed	5,253
Deadwood (e.g. uncontactable phone numbers)	1,502
Refusal	2,585
Ineligible	597
Complete interview	5,133
Response rate	42%

Table 2.4.2 below shows the difference in response rates between July 2019-March 2020 and April 2020 onwards to highlight the impact of COVID-19 on survey fieldwork. The response rate between July 2019 and March 2020 was 46%. This decreased to 31% for the period between April 2020 and June 2020. The proportion of issued sample records that were 'deadwood' was unchanged over this time (around 10% of issued sample) as was the proportion of businesses that refused to participate (17% of issued sample), however the response rate decreased due to a higher proportion of businesses eligible but not interviewed. This included outcomes such as 'answer machine', 'no answer', or 'engaged'.

[6] https://www.aapor.org/Standards-Ethics/Standard-Definitions-(1).aspx
[7] Based on response rate 3 calculations, which can be found here: https://www.aapor.org/Standards-Ethics/Standard-Definitions-(1).aspx

Table 2.4.2 Fieldwork outcomes July 2019 to June 2020

Fieldwork outcomes	Jul 19-Mar 20	Apr 20 – Jun 20
	Number of cases *(N)*	**Number of cases *(N)***
Number of cases issued	11,025	4,046
Live sample – eligible but not interviewed	3,402	1,852
Deadwood (e.g. uncontactable phone numbers)	1,127	375
Refusal	1,904	681
Ineligible	498	99
Complete interview	4,094	1,039
Response rate	46%	31%

Table 2.4.3 Fieldwork outcomes for each DIT service July 2019 to June 2020

	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector teams	Webinars	Export Opportunities	Business Profiles	SOO
Number of cases issued	410	6,019	646	721	309	2,573	1,198	1,795	927	384	89
Live sample - no interview	110	1,969	247	239	119	928	451	678	359	121	32
Deadwood	37	498	81	105	49	337	136	132	78	41	8
Refusal	81	977	104	144	43	430	213	306	164	104	19
Ineligible	3	172	25	35	9	113	81	110	28	19	2
Complete	179	2,403	189	198	89	765	317	569	298	99	28
Response rate	49%	47%	38%	38%	38%	39%	37%	41%	38%	34%	37%

Levels of ‘deadwood’ (uncontactable phone numbers) were generally consistent between 7% and 16% of issued sample records.

Table 2.4.4 Levels of deadwood for each DIT service

Export Client Survey services	Deadwood %
TAP	9%
ITAs	8%
Missions	13%
OBNI	15%
OMIS	16%
Posts	13%
Sector teams	11%
Webinars	7%
Export Opportunities	8%
Business Profiles	11%
SOO	9%

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 2018/19[8]. Only changes that are statistically significant are highlighted in the text. Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

[8] Export Client Quality Survey for businesses supported April 2018 to March 2019

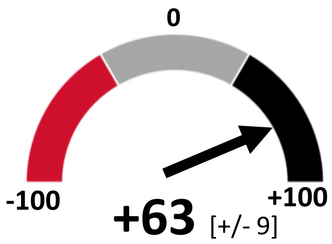
Summary page – TAP

2018/19 result

2019/20 result

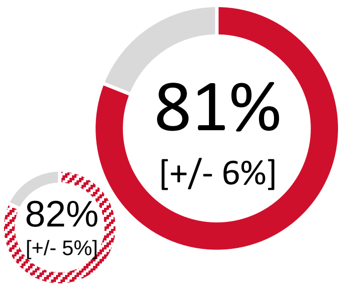
Significant change from the 2018/19 results at 95% significance level

Net Promoter Score

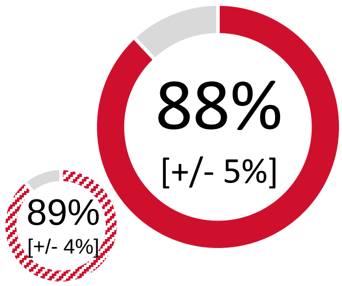


2018/19: **+63** [+/- 7]

Overall service met needs

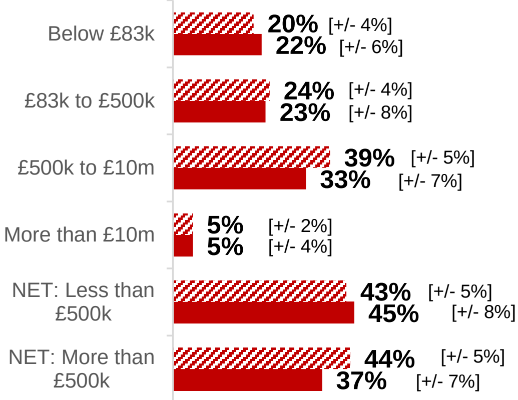


Satisfaction with service

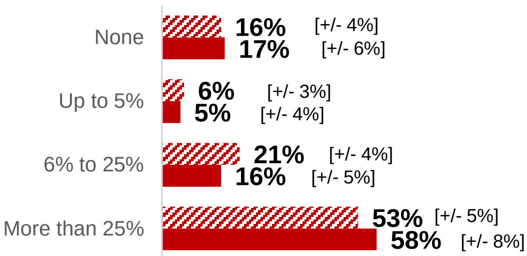


Turnover

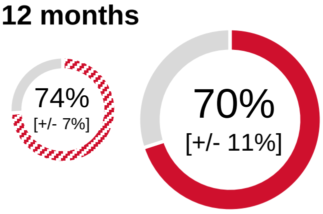
Turnover



% of turnover from exporting

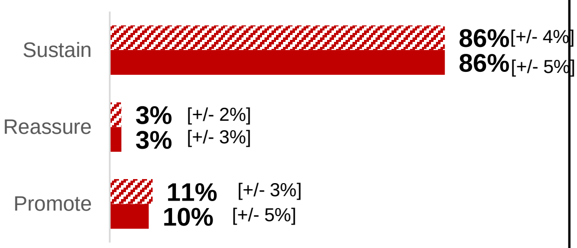


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

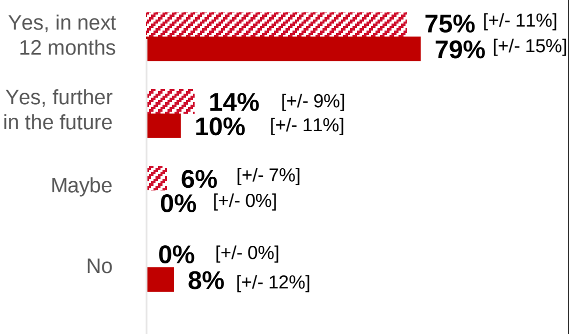


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.1. Tradeshow Access Programme (TAP)

The Tradeshow Access Programme (TAP) provides subsidised opportunities for UK firms to exhibit at international trade fairs. Each year DIT, with the relevant TAP trade challenge partners, agrees which overseas trade shows they will support UK businesses to attend via grants. Businesses take part as a group, led by the trade challenge partner for that trade show.

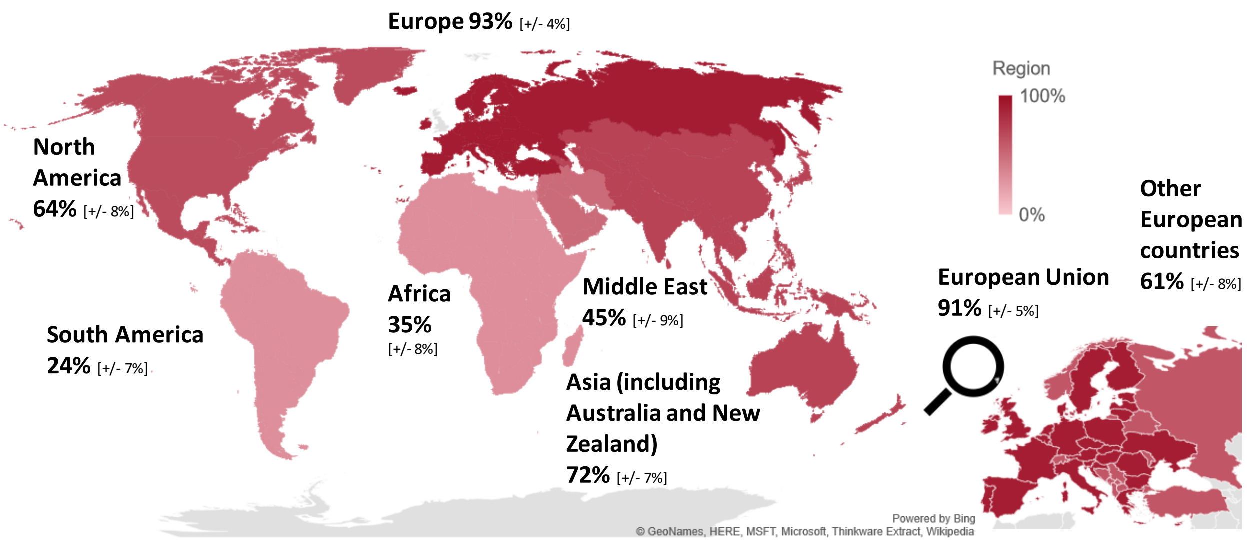
These findings are based on interviews with 179 businesses who used TAP in April 2019 to March 2020. Around eight in ten (82%) sold goods overseas and around a third (34%) sold services (66% only sold goods, 18% only sold services and 16% both).

Throughout this section the findings from businesses that used TAP between April 2019 and March 2020 (2019/20) are compared with the 369 businesses interviewed after using TAP in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported.

3.1.1. TAP: Business export status

Eighty-six per cent of businesses currently export by selling goods or services or have done so previously. Of these, around nine in ten businesses (91%) exported within the European Union. Over half (61%) sold within the rest of Europe. Around seven in ten sold goods or services in Asia (72%), more than six in ten in North America (64%), and just under half sold within the Middle East (45%). Around one in three (35%) sold goods or services in Africa. The least common area was South America (24%). There have been no significant changes since 2018/19.

Chart 3.1.1 Regions organisations exports to or exported to previously – TAP



Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used TAP and who have exported (160)

Table 3.1.1: Regions organisations exports to or exported to previously - TAP

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Significant Change*
Europe	**92%**	3%	**93%**	4%	-
European Union	**90%**	3%	**91%**	5%	-
Other European countries	**67%**	5%	**61%**	8%	-
Asia (including Australia and New Zealand)	**71%**	5%	**72%**	7%	-
North America	**66%**	5%	**64%**	8%	-
Middle East	**50%**	5%	**45%**	9%	-
Africa	**31%**	5%	**35%**	8%	-
South America	**31%**	5%	**24%**	7%	-
Base	*330*		*160*		

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used the TAP service and who have exported.
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

3.1.2. Service performance: TAP

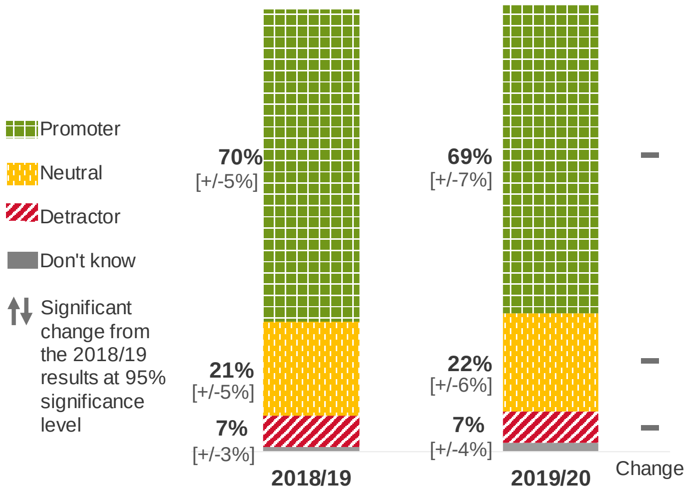
The perceived performance of the service provided by TAP was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experiences of using TAP, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS).

Around seven in ten (69%) were 'Promoters' of TAP (score of nine or ten), while seven per cent were 'Detractors' (score of zero to six) and one in five (22%) were neutral (score of seven or eight); Chart 3.1.2 provides details. Overall, TAP had a positive NPS of +63. These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

Chart 3.1.2 Likelihood of recommending service (NPS) – TAP



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 the TAP service in 2018/19 (369), all respondents who used the TAP service in 2019/20 (179)

Businesses were asked about ways the service they used **could be improved**. Issues relating to costs or funding (19%) were the most frequently cited, including 13% who requested increased funding or financial assistance. There were also comments regarding support (11%), mainly requests for more support; information (nine per cent), such as better or more information; events (nine per cent), such as more events or the option of attending events more than once; service (seven per cent), such as better promotion of services; and improved communication (six per cent).

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[9].

Around nine in ten businesses (88%) were satisfied with their experience of TAP (rating of seven or more out of ten), and this included 26% of businesses who gave a 'very satisfied' rating (ten out of ten). Three per cent of businesses were dissatisfied (rating of three or below), while ten per cent gave a neutral rating (between four and six). These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

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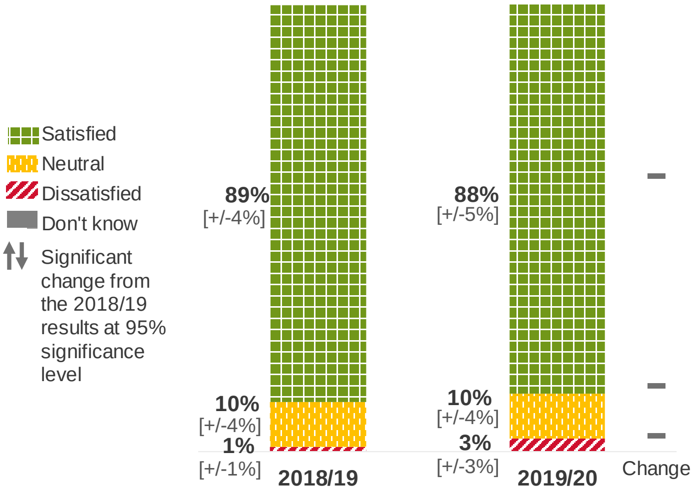
[9] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.1.3 Satisfaction with service - TAP



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 the TAP service, except those giving a 'not applicable' answer in 2018/19 (366) and in 2019/20 (177)

Perceptions of advice and support

This section shows how businesses rated the advice and support they received from TAP.

All respondents were asked **what happened when the organisation used the service** (Chart 3.1.4). The chart shows the activities that are most relevant to TAP (above the dotted line)[10], as well as other activities that businesses may have experienced.

Businesses were most likely to have attended an event, trade fair or mission (72%), applied for finance or funding (69%) or to have been provided with new business contacts or export opportunities (66%).

In addition, around half of businesses (47%) attended a one-to-one meeting or received one-to-one advice over the phone, while a third looked for further information or used online services on the DIT or Great.gov.uk website (33%) or were referred to other DIT services (32%). Three in ten (30%) said they were referred to the services of another organisation, an increase on the 2018/19 figure of 20%. There were no noticeable differences by business type.

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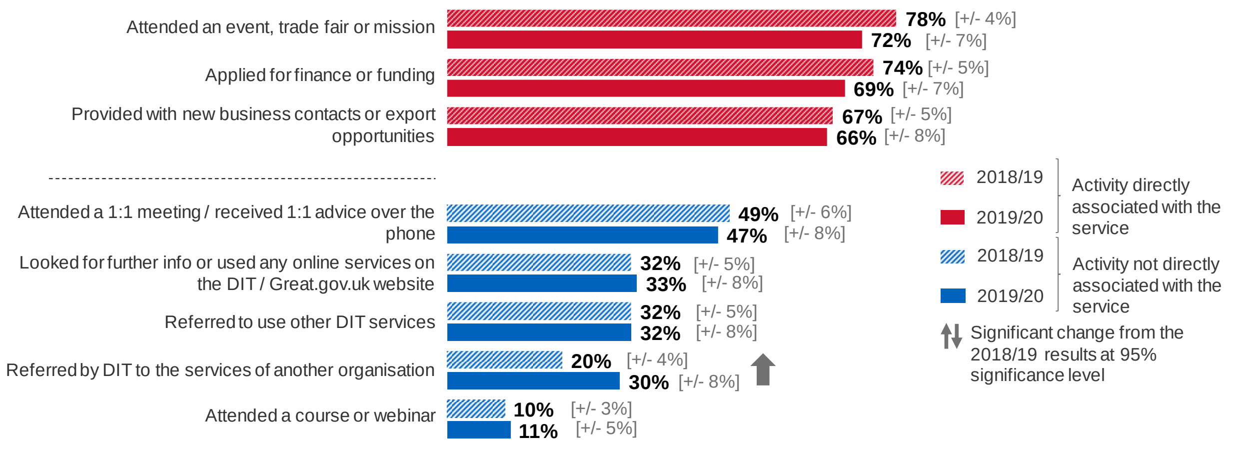
[10] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.1.4 Specific activities experienced when using TAP



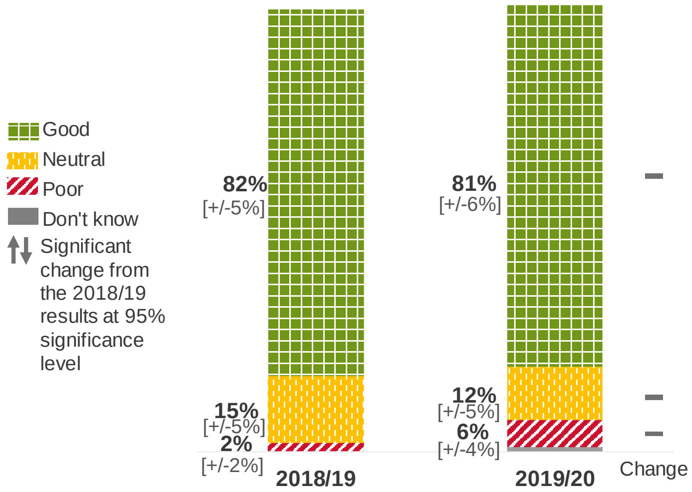
Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used the TAP service (2018/19: 369, 2019/20: 179)

When asked which **specific types of support** they received as part of TAP, 12% said they received tailored ‘route to market’ information, and 12% said they received an off-the-shelf overview for existing markets and sectors.

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.1.5, eight in ten (81%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while 12% were neutral (score of four to six) and six per cent said it was poor (rating of zero to three). These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

Chart 3.1.5 Rating of whether overall service met needs – TAP



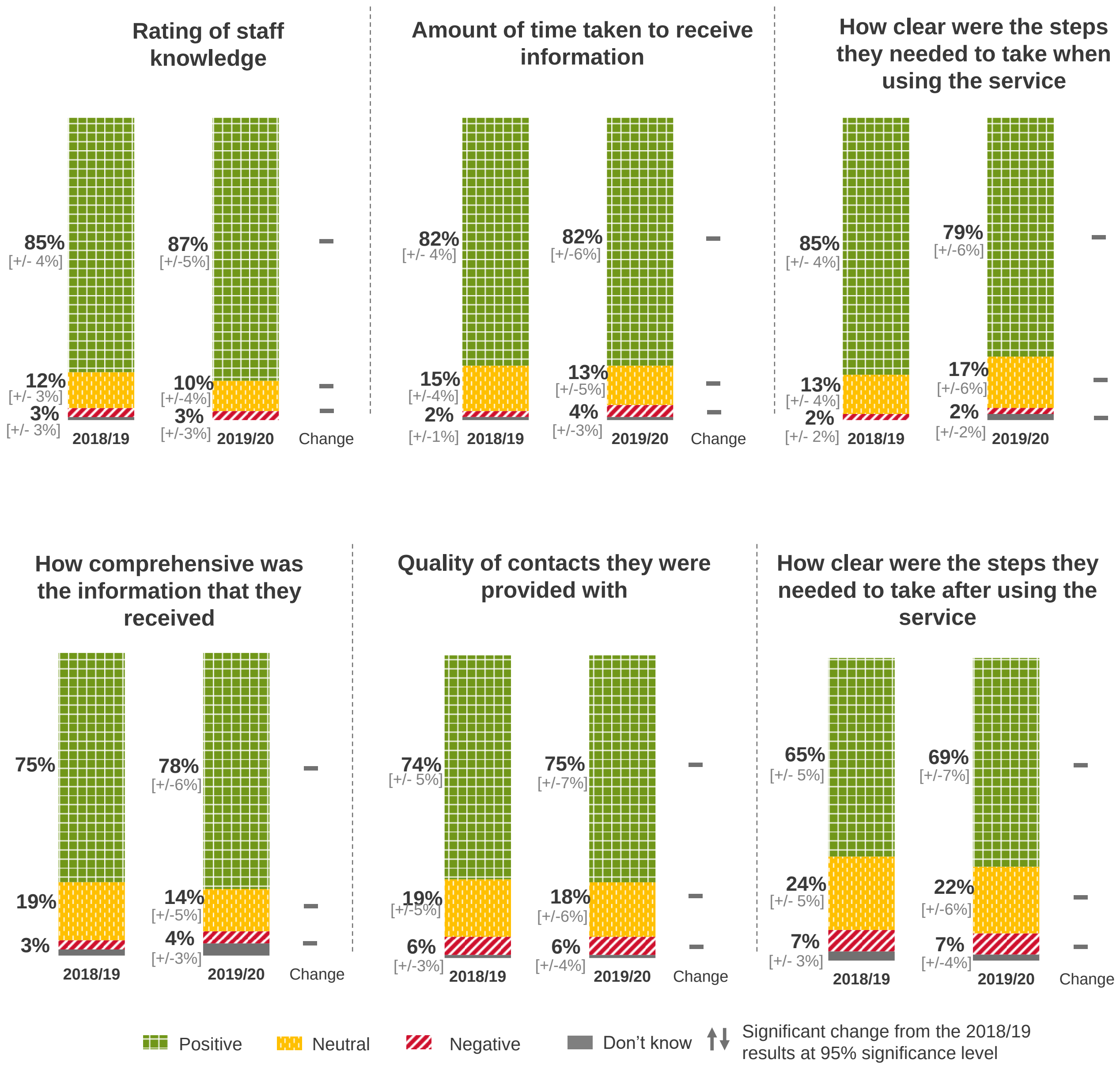
Qqualinfo - Using that same scale, how would you rate... The extent to which the overall service received met your needs? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used the TAP service, except those giving a 'not applicable' answer in 2018/19 (362) and in 2019/20 (173)

Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Charts 3.1.6 to 3.1.7 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

On most of the measures, the majority of businesses gave positive ratings for their experience of TAP, with the highest ratings given for staff knowledge, the organisation of the service and the registration process (87% rated each of these aspects positively).

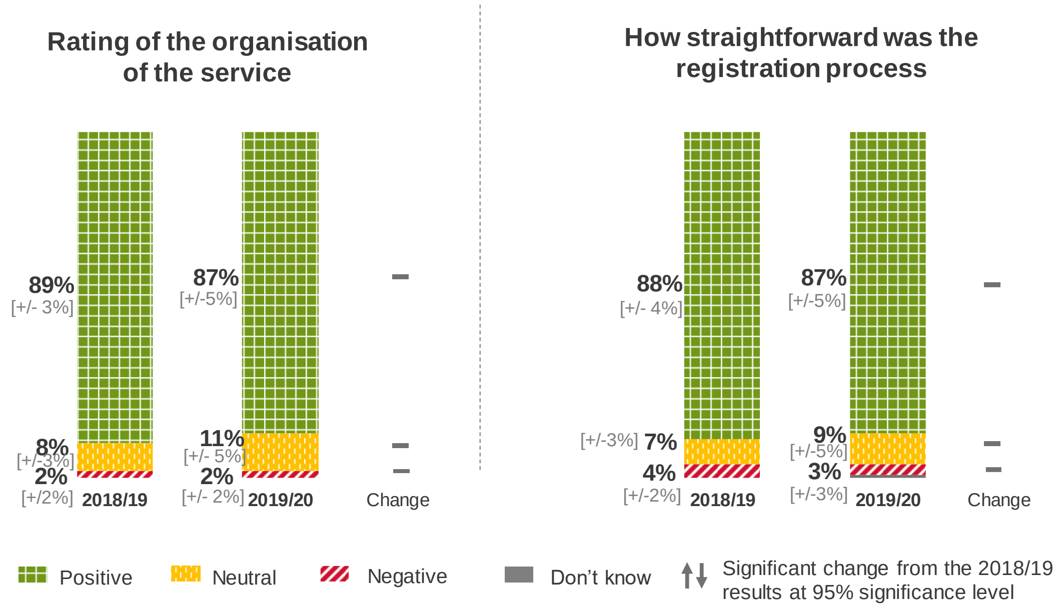
There were no significant changes since 2018/19. There were no noticeable differences by business type.

Chart 3.1.6 Rating by businesses of the specific advice and support they received – TAP



Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (2018/19: 349, 2019/20: 167). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 352, 2019/20: 173). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 349, 2019/20: 162).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 358, 2019/20: 172). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 339, 2019/20: 153). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 353, 2019/20: 171). Base: All businesses that used the TAP service, except those giving a 'not applicable' answer.

Chart 3.1.7 Rating by businesses of the organisation of the service and registration process – TAP

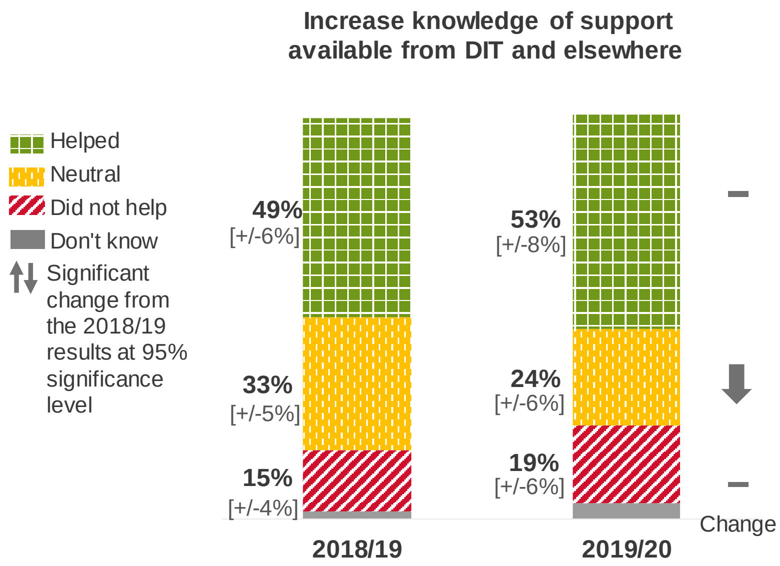


Qevent - How would you rate the organisation of the [SAMPLED SERVICE]? (2018/19: 366, 2019/20: 177).
Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (2018/19: 366, 2019/20: 177),
Base: All respondents that used the TAP service, except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had helped them to **increase their knowledge of the support available from DIT and elsewhere**, using a scale from ten (helped a lot) to zero (did not help at all). Around half (53%) of businesses that had used TAP said that the service helped them to increase their knowledge of the support available from DIT and elsewhere, while a fifth (19%) said the service did not help them in this way. The proportion of businesses who were neutral decreased from 2018/19 (to 33% from 24%); see Chart 3.1.8.

Businesses with a turnover of under £500,000 were more likely than businesses with a turnover of £500,000 or more to say that the service helped them to increase their knowledge of the support available from DIT and elsewhere (65% compared with 42%).

Chart 3.1.8 Perceptions of help TAP provided



Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to …Base All respondents that used the TAP service in 2018/19 (369) and 2019/20 (179)

Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with TAP.

Businesses carried out a **range of actions as a result of using TAP**. Chart 3.1.9 shows the actions that are most relevant to TAP (above the dotted line)[11], as well as other actions that businesses may have taken.

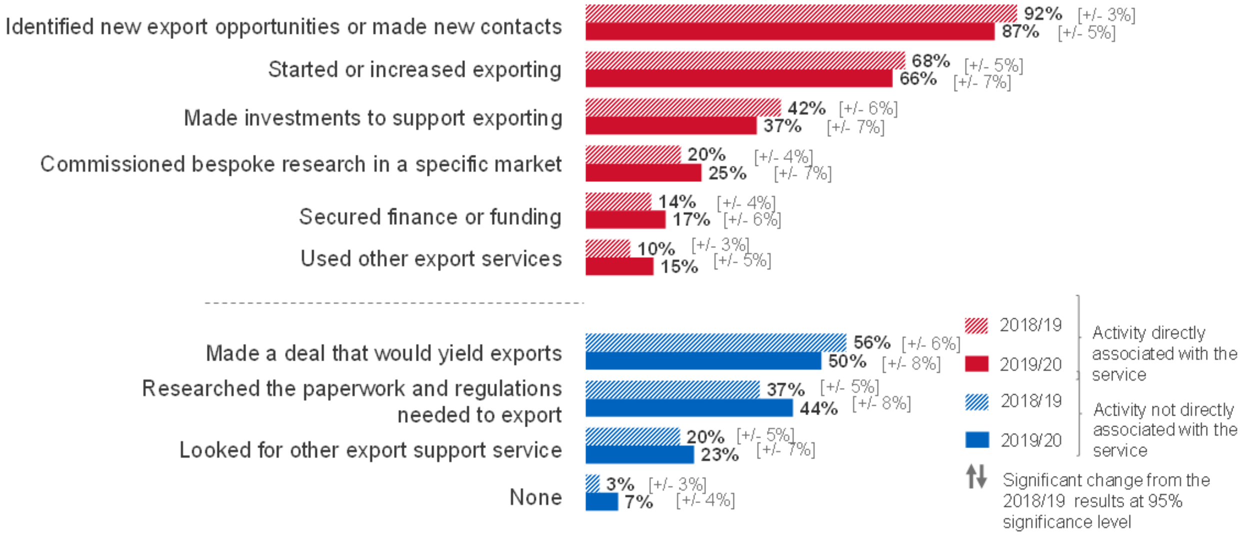
Looking firstly at the actions that are most relevant to TAP, businesses were most likely to say they identified new export opportunities or made new contacts (87%), started to import or increased exports (66%) or made investments to support exporting (37%).

Other actions (less specific to TAP) include assessing the company's readiness to export, which 85% of businesses who were not exporting at the time of the service had done (this result should be treated with caution, due to the low base size). Half of all businesses had made a deal that would yield exports (50%) and just under half had researched the paperwork and regulations needed to export (44%).

There have been no significant changes since 2018/19.

[11] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.1.9 Actions taken as a result of service interaction – TAP

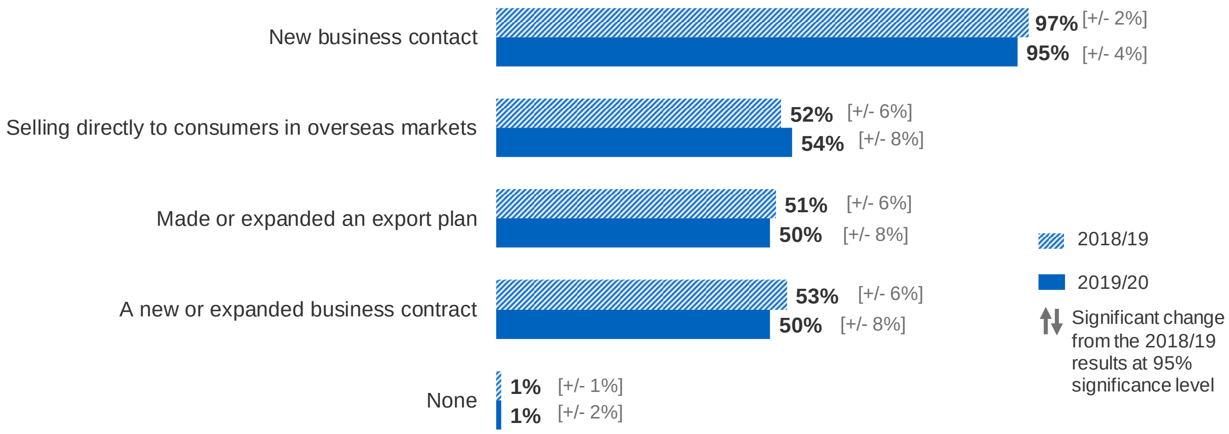


Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 2% of respondents.
Base: All respondents who used the TAP service (2018/19: 369, 2019/20: 179).

Businesses that reported having identified, or been provided with, new business contacts or export opportunities as part of the service from TAP (169 respondents) were asked **what types of opportunities had been identified** (see Chart 3.1.10).

Respondents were most likely to say that they had identified new business contacts (95%), while the other main opportunities were selling directly to consumers in overseas markets (54%), making or expanding an export plan (50%) and making a new or expanded business contract (50%). These figures have not changed since 2018/19, and there were no noticeable differences by business type.

Chart 3.1.10 Opportunities identified as a result of service interaction – TAP



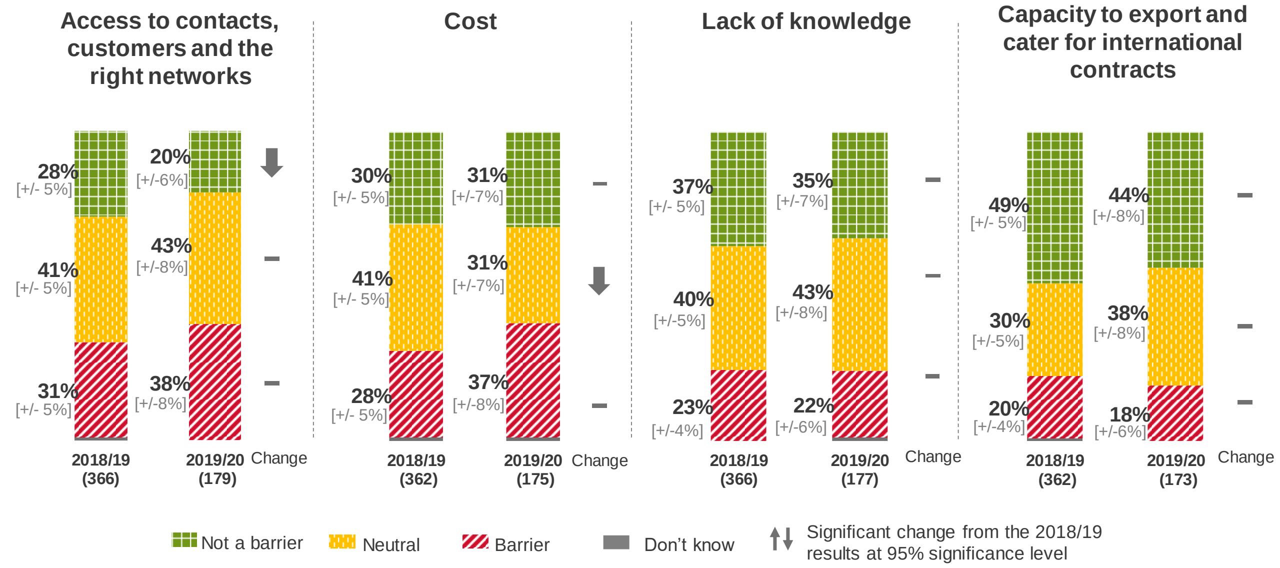
Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used the TAP service who had identified a new business contact as part of the DIT service (2018/19:356, 2019/20: 169)

Businesses that had identified a new business contact as part of the TAP service (161 respondents) were read a list of possible **types of contact** and asked which ones they had made. Two-thirds of the businesses that had identified a new contact said they had made contact with a buyer (66%), while more than half had contacted a distributor (56%) and around a third (35%) had contacted an agent. There were no significant changes in these figures since 2018/19.

Businesses were asked about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

More than a third of businesses said that access to contracts, customers and the right networks was a barrier for their business (38% gave a score of seven or more out of ten), with 20% saying this was *not* a barrier, a significant decrease from 28% in 2018/19. Cost was said to be a barrier by 37% of businesses (there was a decrease in the proportion that were neutral about this being a barrier since 2018/19), while 22% said that lack of knowledge was a barrier, and 18% said the same about their capacity to export and cater for international contracts; see Chart 3.1.11. There were no noticeable differences by business type.

Chart 3.1.11 Barriers to exporting – TAP

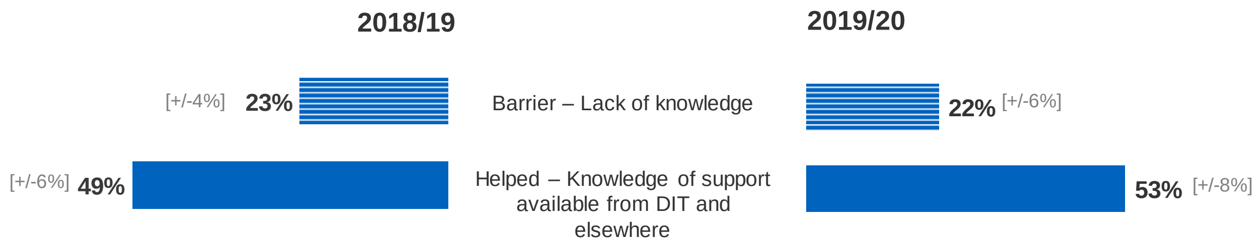


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used the TAP service, except those giving a 'not applicable' answer

Chart 3.1.12 compares responses to questions on the barriers to exporting (listed above) with business perceptions of how DIT helped them export. Businesses that were interviewed about TAP were asked about how DIT helped them increase their knowledge of the support available.

Around one in five (22%) said that lack of knowledge was a barrier to exporting, while more than twice as many (53%) said that TAP helped them increase their knowledge of support available.

Chart 3.1.12 Barriers to exporting and how DIT helped – TAP



Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used the TAP service, except those giving a 'not applicable' answer: Lack of knowledge 2018/19: 366, 2019/20: 177.
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 support available from DIT and elsewhere. Base: All respondents who used the TAP service: 2018/19: 369, 2019/20: 179.

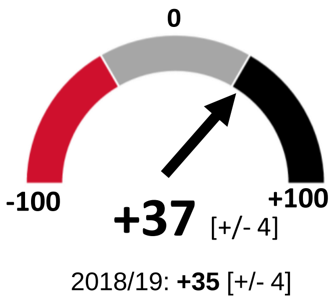
Summary page – ITAs

2018/19 result

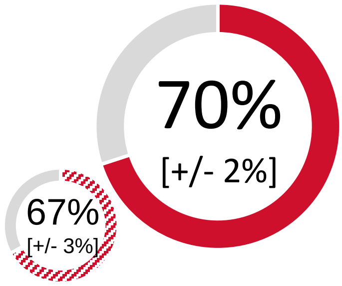
2019/20 result

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

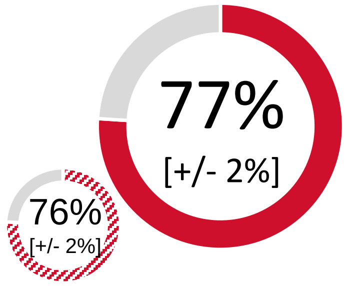
Net Promoter Score



Overall service met needs

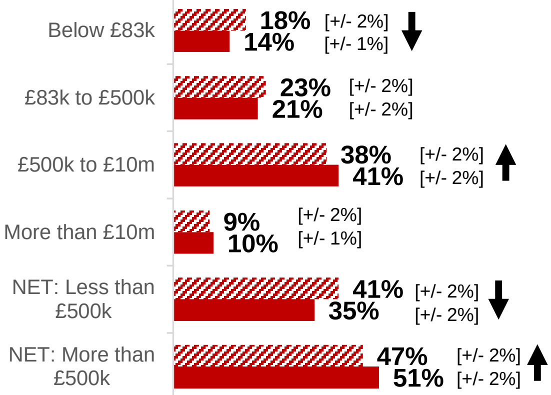


Satisfaction with service

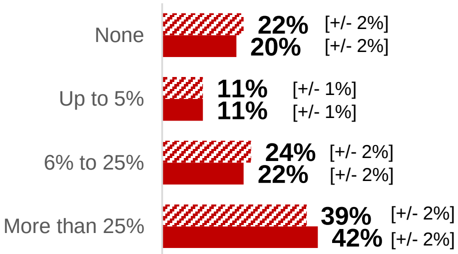


Turnover

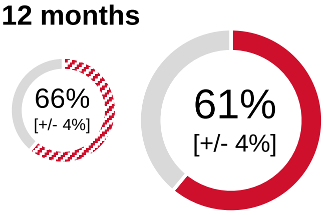
Turnover



% of turnover from exporting

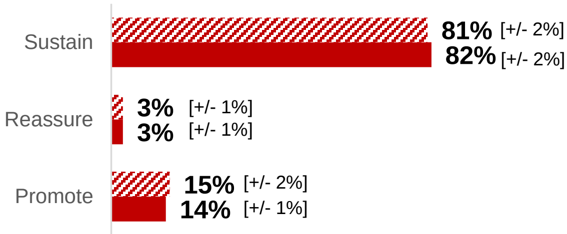


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

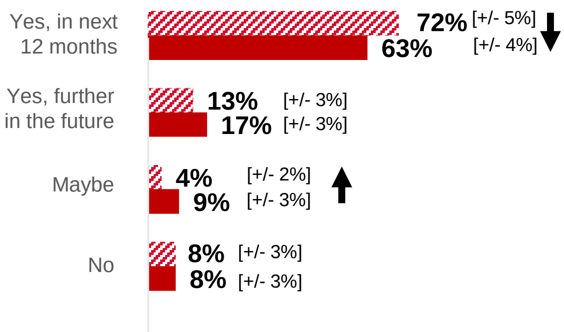


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.2. International Trade Advisors (ITAs)

International Trade Advisors (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.

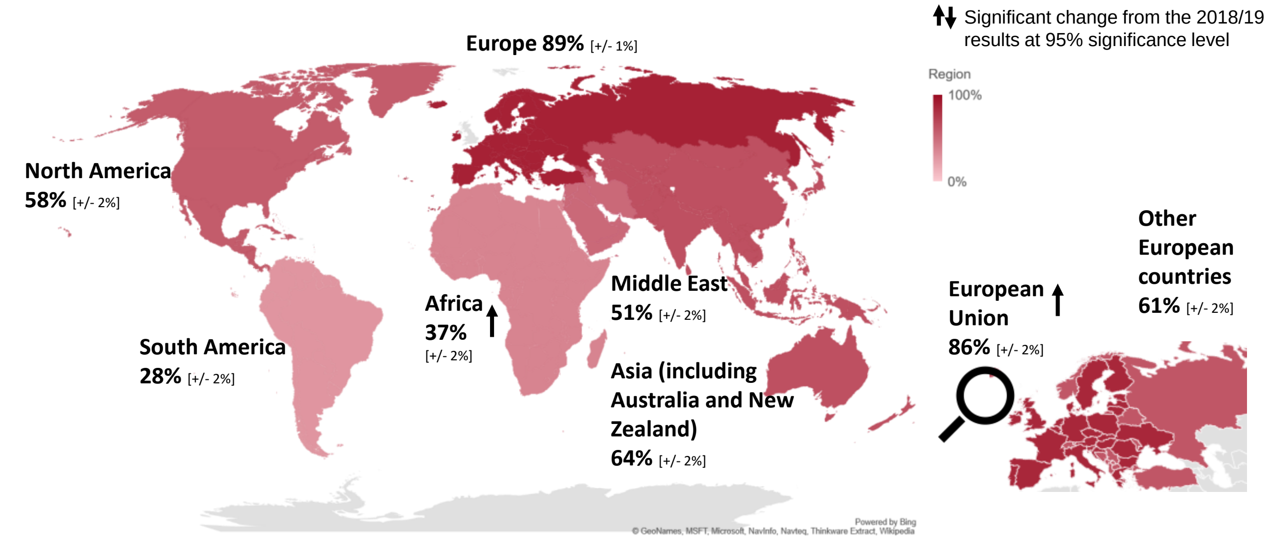
These findings are based on interviews with 2,402 businesses who used an ITA in April 2019 to March 2020. More than three-quarters (76%) sold goods overseas and around four in ten (37%) sold services (62% only sold goods, 23% only sold services and 14% both).

Throughout this section the findings from businesses that used an ITA between April 2019 and March 2020 (2019/20) are compared with the 2,001 businesses interviewed after using an ITA in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported. It should be noted that the profile of businesses interviewed that used an ITA changed slightly between 2018/19 and 2019/20. As the ITA summary chart shows, there were a higher proportion of businesses with a turnover of more than £500,000 supported in 2019/20 than 2018/19. Analysis was conducted to understand if year on year changes were caused by the higher proportion of larger businesses supported in 2019/20. This was done by looking at change among businesses with a turnover of less than £500,000 and change among businesses with a turnover of more than £500,000. It was found that the majority of changes were not caused by the higher proportion of businesses with a larger turnover, however where this is the case it has been highlighted in the text.

3.2.1 ITAs: Business export status

Eighty-two per cent of businesses currently export by selling goods or services or have done so previously. Of these, around than nine in ten businesses (86%) exported within the European Union, an increase from 84% in 2018/19. Over half (61%) sold within the rest of Europe. Around six in ten sold goods or services in Asia (64%) or North America (58%), and half sold within the Middle East (51%). Just under four in ten (37%) sold goods or services in Africa, an increase from 33% in 2018/19. The least common area was South America (28%).

Chart 3.2.1 Regions organisations exports 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 (2049)

Table 3.2.1: Regions organisations exports to or exported to previously - ITAs

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Significant Change*
Europe	**87%**	2%	**89%**	1%	-
European Union	**84%**	2%	**86%**	2%	↑
Other European countries	**58%**	3%	**61%**	2%	-
Asia (including Australia and New Zealand)	**63%**	3%	**64%**	2%	-
North America	**60%**	3%	**58%**	2%	-
Middle East	**48%**	3%	**51%**	2%	-
Africa	**33%**	3%	**37%**	2%	↑
South America	**26%**	2%	**28%**	2%	-
Base	*1,683*		*2,049*		

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used ITAs and who have exported.
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

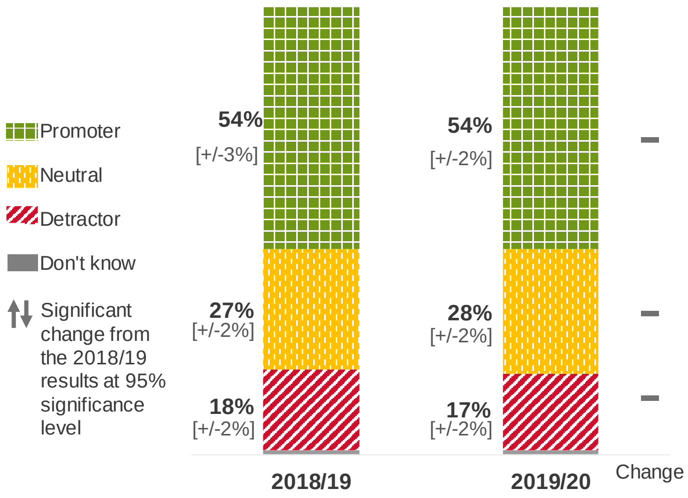
3.2.2. Service performance: ITAs

The perceived performance of the service provided by ITAs was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experiences of using an ITA, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS). More than half (54%) were 'Promoters' of ITAs (score of nine or ten), while one in six (17%) were 'Detractors' (score of zero to six) and one in four (27%) were neutral (score of seven or eight); Chart 3.2.2 provides details. Overall, ITAs had a positive NPS of +37. These figures remain unchanged since 2018/19.

Chart 3.2.2 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 in 2018/19 (2001), all respondents who used ITAs in 2019/20 (2402)

The table below shows a breakdown of the Net Promoter Score for each ITA region. There were no significant changes in any region since 2018/19.

Table 3.2.2: Likelihood of recommending service (NPS) by ITA region

	2018/19 NPS	2018/19 CI (+/-)	2018/19 Base	2019/20 NPS	2019/20 CI (+/-)	2019/20 Base	Significant Change*
North East	**38**	19%	97	**54**	11%	143	-
North West	**27**	9%	385	**38**	9%	317	-
Yorkshire	**44**	14%	205	**35**	11%	255	-
East Midlands	**31**	22%	129	**43**	10%	221	-
West Midlands	**33**	16%	138	**45**	9%	337	-
East England	**29**	12%	221	**31**	13%	267	-
London	**39**	10%	310	**37**	10%	236	-
South East	**39**	8%	402	**28**	8%	498	-
South West	**41**	16%	114	**28**	14%	128	-
Super-regions							
London	**39**	10%	310	**37**	10%	236	-
ME	**32**	14%	267	**44**	7%	558	-
NPH	**34**	7%	687	**40**	6%	715	-
South	**36**	6%	737	**29**	6%	894	-

Base: All respondents using ITAs
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

The likelihood of recommending the service was consistent across different types of business.

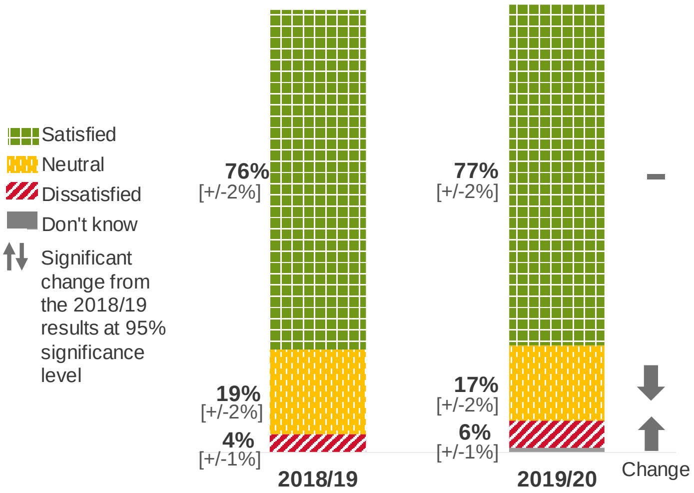
Businesses were asked about ways the service they used **could be improved**. Businesses raised a range of issues, including information (16%), for example better or more information; staff (13%), including requests for more knowledgeable staff and a better understanding of their market or the current climate; more or specialist support (10%); communication (9%), including more feedback or follow-up; and better service (8%).

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[12].

Three in four businesses (77%) were satisfied with their experience of ITAs (rating of seven or more out of ten), and this included one in four businesses (27%) who gave a 'very satisfied' rating (ten out of ten). This remains unchanged since 2018/19. Six per cent of businesses were dissatisfied (rating of three or below), an increase from four per cent in 2018/19, while 17% gave a neutral rating (between four and six), a decrease from 19%.

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

Chart 3.2.3 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, except those giving a 'not applicable' answer in 2018/19 (1982) and in 2019/20 (2373)

The table below shows satisfaction with service by ITA region. There were no significant changes in any region since 2018/19.

Table 3.2.3: Satisfaction with service by ITA region

	2018/19 Satisfied	2018/19 CI (+/-)	2018/19 Base	2019/20 Satisfied	2019/20 CI (+/-)	2019/20 Base	Change*
North East	**80%**	10%	97	**86%**	6%	142	-
North West	**73%**	6%	380	**79%**	5%	312	-
Yorkshire	**81%**	8%	203	**76%**	6%	251	-
East Midlands	**76%**	10%	127	**79%**	6%	218	-
West Midlands	**79%**	9%	137	**80%**	5%	336	-
East England	**78%**	6%	220	**71%**	7%	263	-
South West	**79%**	9%	114	**76%**	8%	128	-
South East	**76%**	5%	397	**73%**	5%	492	-
London	**79%**	5%	307	**78%**	6%	231	-
Super-regions							
London	**79%**	5%	307	**78%**	6%	231	-
ME	**77%**	7%	264	**80%**	4%	554	-
NPH	**76%**	4%	680	**79%**	3%	705	-
South	**75%**	5%	731	**73%**	4%	883	-

Base: All respondents using ITAs, except those giving a 'not applicable' response
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

Satisfaction with the service was consistent across different types of business.

Of the 138 businesses who were dissatisfied with the service (i.e. they gave a rating of zero to three out of ten), the most commonly reported **reason for dissatisfaction** with ITAs was that businesses did not feel the service did anything for them or did not help them (59%). Another main reason for dissatisfaction was that they did not get enough information or advice (50%), while there were also comments poor quality of contacts (14%), the fact that the advice was more relevant to other types of businesses (13%), insufficient contact (10%) and poor communication or lack of follow up or feedback (10%). Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options.

Perceptions of advice and support

This section shows how businesses rated the advice and support they received from ITAs.

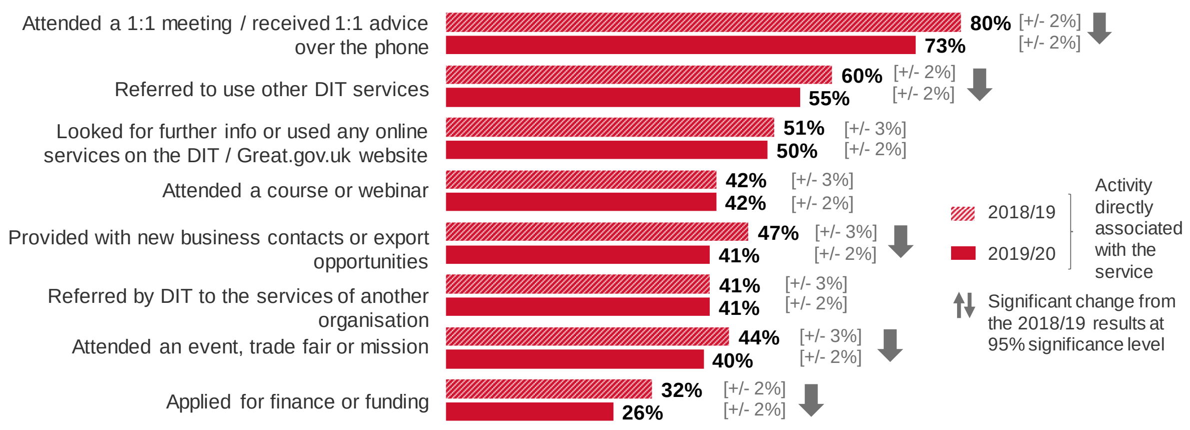
All respondents were asked **what happened when the organisation used the service** (Chart 3.2.4). The chart shows the activities that are most relevant to ITAs (above the dotted line)[13], as well as other activities that businesses may have experienced.

Businesses were most likely to have attended a one-to-one meeting or received one-to-one advice over the phone (73%), while around half (55%) were referred to other DIT services, and half (50%) looked for further information or used online services on the DIT or Great.gov.uk website. Just under half of businesses were provided with new business contacts or export opportunities (47%) or attended an event, trade fair or mission (44%). Two in five attended a course or webinar (42%) or were referred to the services of another organisation (41%). Since 2018/19, there was a decrease in the proportion of businesses who attended a one to one meeting or received one to one advice over the phone, been referred to use other DIT services, attended an event, trade fair or mission, or applied for finance or funding. These decreases were primarily among larger businesses with a turnover of more than £500,000. There was also a decrease in the proportion of businesses that had been provided with new business contacts or export opportunities, which was primarily among businesses with a turnover of less than £500,000.

Since March 2020, Covid-19 has changed the way that ITAs have been able to deliver services. Businesses interviewed between March and June 2020 were more likely to say that they had attended a one to one meeting or received one to one advice over the phone (80%) compared with businesses interviewed between July 2019 and February 2020 (71%). There were no other differences for other outcomes.

[13] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.2.4 Specific activities experienced when using ITAs



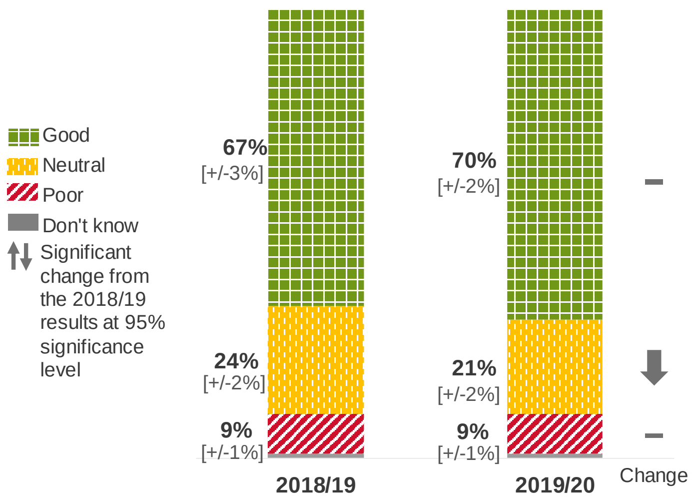
Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used ITAs (2018/19: 2001, 2019/20: 2402)

When asked which **specific types of support** they received as part of ITAs, 24% said they received an off-the-shelf overview for existing markets and sectors, a decrease from 28% in 2018/19. Two in ten (21%) received tailored 'route to market' information, 14% received market information about competition specific to their products or services, and eight per cent had an analysis of their suppliers and value chain.

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.2.5, seven in ten (70%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while two in ten (21%) were neutral (score of four to six), a decrease from 2018/19 (24%). Nine per cent said it was poor (rating of zero to three). There were no noticeable differences by business type.

Chart 3.2.5 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? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used an ITA, except those giving a 'not applicable' answer in 2018/19 (1942) and in 2019/20 (2339)

The table below shows a breakdown of the extent to which the overalls service received met needs for each ITA region. There were no significant changes in any region since 2018/19. Looking only at the data for 2019/20, businesses in the North East were more likely to give a positive rating (81%) compared with businesses in East England (62%).

Table 3.2.4: Rating of whether overall service met needs by ITA region

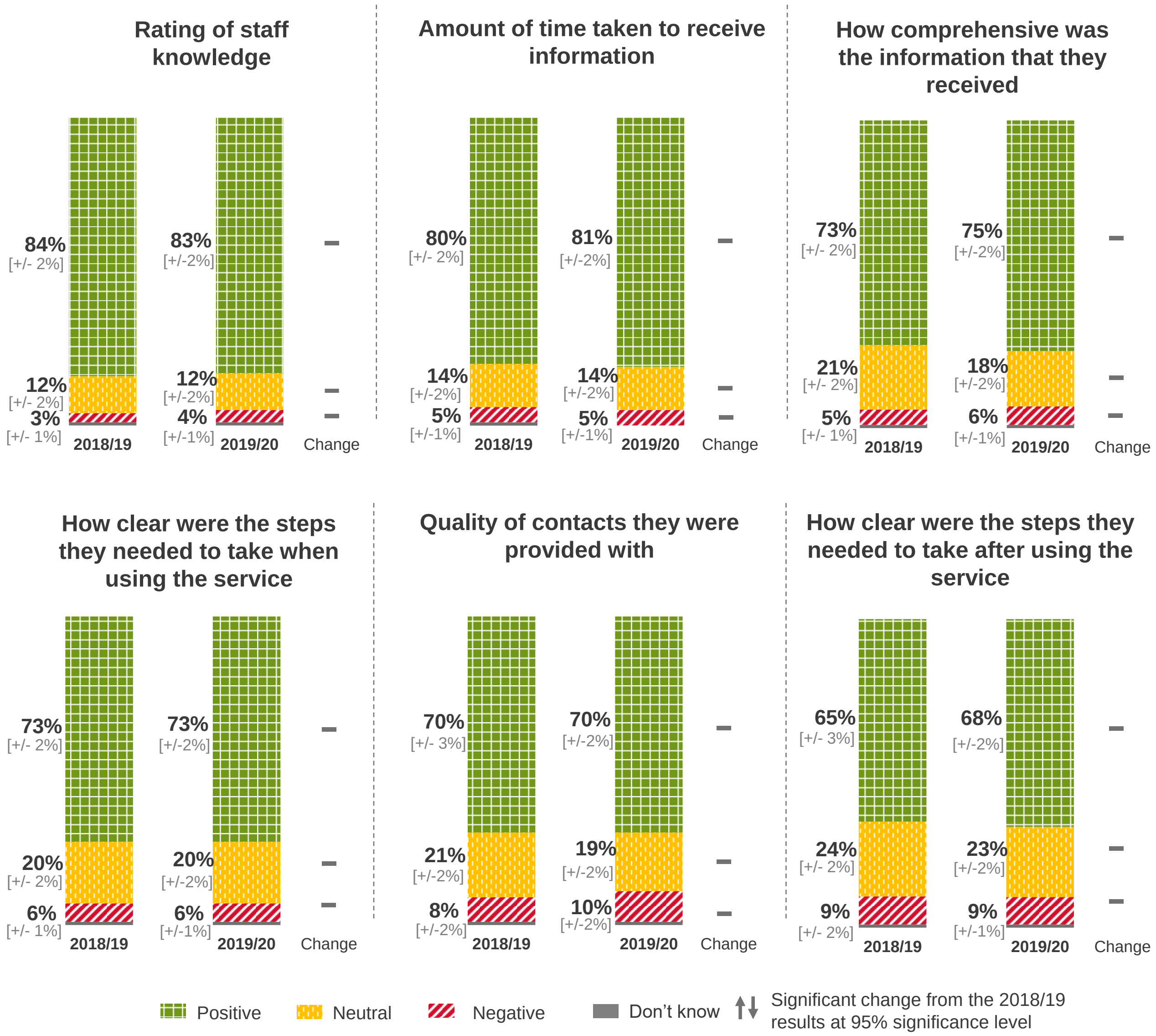
	2018/19 Positive	2018/19 CI (+/-)	2018/19 Base	2019/20 Positive	2019/20 CI (+/-)	2019/20 Base	Change*
North East	**70%**	11%	96	**81%**	7%	134	-
North West	**62%**	6%	369	**70%**	6%	307	-
Yorkshire	**77%**	7%	198	**70%**	7%	250	-
East Midlands	**62%**	11%	125	**71%**	7%	213	-
West Midlands	**70%**	10%	138	**71%**	5%	329	-
East England	**65%**	7%	215	**62%**	7%	259	-
South West	**68%**	10%	112	**66%**	8%	125	-
South East	**62%**	6%	389	**67%**	5%	489	-
London	**72%**	6%	300	**74%**	6%	233	-
Super-regions							
London	**72%**	6%	300	**74%**	6%	233	-
ME	**66%**	8%	263	**71%**	4%	542	-
NPH	**68%**	4%	663	**72%**	4%	691	-
South	**64%**	3%	716	**66%**	4%	873	-

Base: All respondents using ITAs, except those giving a 'not applicable' response
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Chart 3.2.6 and Chart 3.2.7 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

On each of the measures, more than half of businesses gave positive ratings for their experience of ITAs, with the highest ratings given for staff knowledge (83% rated staff as 'knowledgeable'), the time taken to receive information or support (81% rated this as 'acceptable') and external handovers (79% were satisfied). Businesses were less likely to give positive ratings for the relevance of services they were referred to – either other DIT services (61%) or other organisations (60%). Negative ratings were given by no more than one in ten respondents on each measure. There were no significant changes since 2018/19.

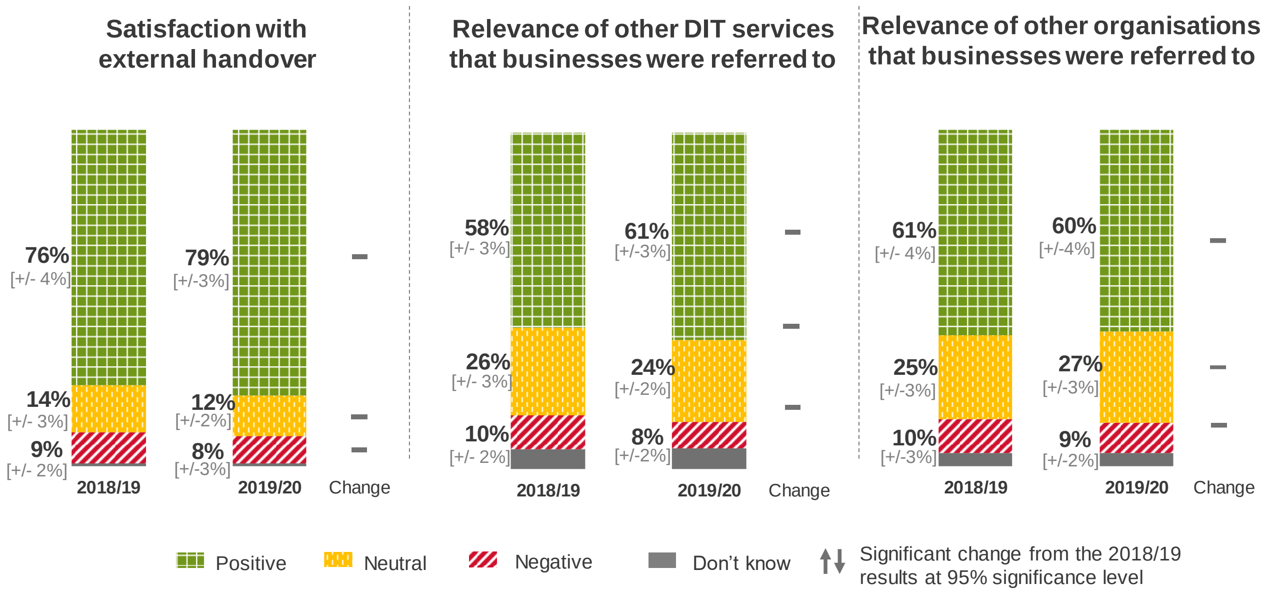
Chart 3.2.6 Rating by businesses of the specific advice and support they received – ITAs



Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (2018/19: 1954, 2019/20: 2315). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 1924, 2019/20: 2263). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 1950, 2019/20: 2335).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 1940, 2019/20: 2314). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 1724, 2019/20: 2025). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 1898, 2019/20: 2286). Base: All businesses that used ITAs, except those giving a 'not applicable' answer.

Businesses that had been in contact with DIT and other government departments were more likely to be positive about the quality of contacts received through the service (71% good) and the clarity of what the business should do next after using (69% agree) compared with those who had only been in contact with DIT only to support exporting (66% and 64% respectively).

Chart 3.2.7 Rating by businesses of the handover and referrals they received – ITAs



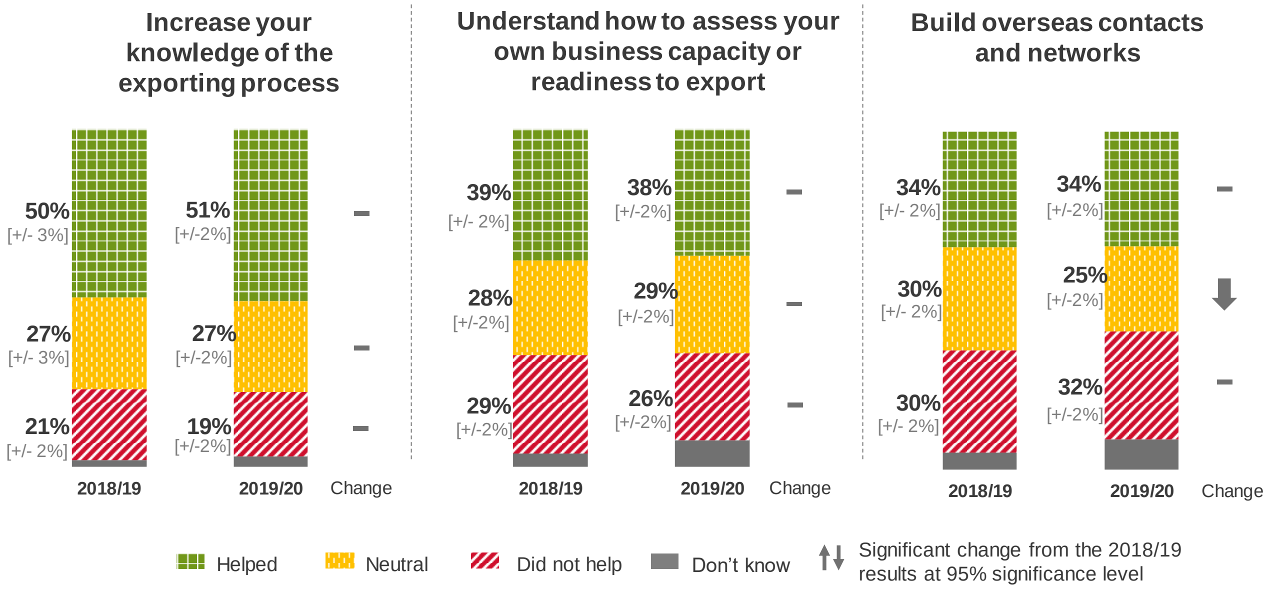
Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (2018/19: 832, 2019/20: 942).
Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (2018/19: 1198, 2019/20: 1306),
Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (2018/19: 840, 2019/20: 955) Base: All respondents that used ITAs, except those giving a 'not applicable' answer

Looking at differences within different types of businesses in 2019/20, businesses with a turnover of under £500,000 were more likely than businesses with a turnover of £500,000 or more to say that other organisations that they were referred to were relevant (68% compared with 57%) or that other DIT services that they were referred to were relevant (67% compared with 60%).

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from ten (helped a lot) to zero (did not help at all). The individual aspects of help and support were tailored to the ITAs service, Chart 3.2.8 shows the items that were asked of businesses that used ITAs. This shows that:

- Half (51%) of businesses that had used ITAs said that the service helped them by increasing their knowledge of the exporting process, while a fifth (19%) said the service did not help them in this way.
- Two in five users of ITAs (38%) said that the service had helped them to understand how to assess their own business capacity or readiness to export, while a quarter (26%) said they were not helped in this way.
- A third (34%) said that the service provided by ITAs helped them to build overseas contacts and networks, while 32% said the service did not help them to do this. The proportion of businesses who were neutral decreased from 2018/19 (to 25% from 30%).

Chart 3.2.8 Perceptions of help ITAs provided



Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to …Base All respondents that used ITAs in 2018/19 (2001) and 2019/20 (2402)

Looking at differences within different types of businesses in 2019/20, small and medium enterprises (with fewer than 250 employees) were more likely to say that the service helped them to understand how to assess their business capacity or readiness to export (39%) compared with large businesses with 250 employees or more (22%). In addition, businesses with a turnover of under £500,000 were more likely to say that the service helped them in this way (43%) compared with businesses with a turnover of £500,000 or more (37%). Businesses with a turnover of £500,000 were also more likely to say that the service did *not* help them to build overseas contacts and networks (34%) compared with businesses with a turnover of less than £500,000 (29%).

Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with ITAs.

Businesses carried out a **range of actions as a result of using ITAs**. Chart 3.2.9 shows the actions that are most relevant to ITAs (above the dotted line)[14], as well as other actions that businesses may have taken. Since 2018/19 there was a significant decrease in the proportion of businesses that had; identified new export opportunities or made new contacts (53% down from 61%), started or increased exporting (35% down from 39%), made investments to support exporting (30% down from 35%) and used other export services (13% down from 17%). The decrease in the proportion of businesses that had made investments to support exporting, or used other export services were primarily among businesses with a turnover of more than £500,000.

Looking at the actions that are most relevant to ITAs, consistent with the findings from 2018/19, 61% of businesses who were not exporting at the time of using the service had assessed the company's readiness to export.

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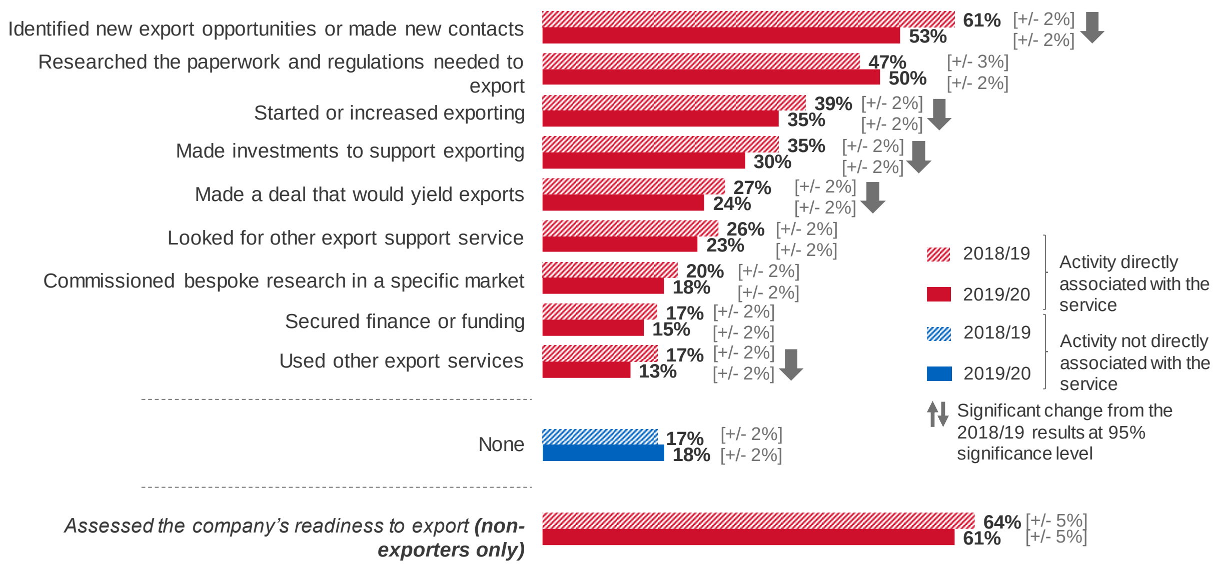
[14] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Half of businesses said they had identified new export opportunities or made new contacts (53%), researched the paperwork and regulations needed to export (50%) and around a third had started or increased exporting (35%), or made investments to support exporting (30%). A quarter made a deal that would yield exports (24%) or looked for other export support services (23%).

Chart 3.2.9 Actions taken as a result of service interaction - ITAs



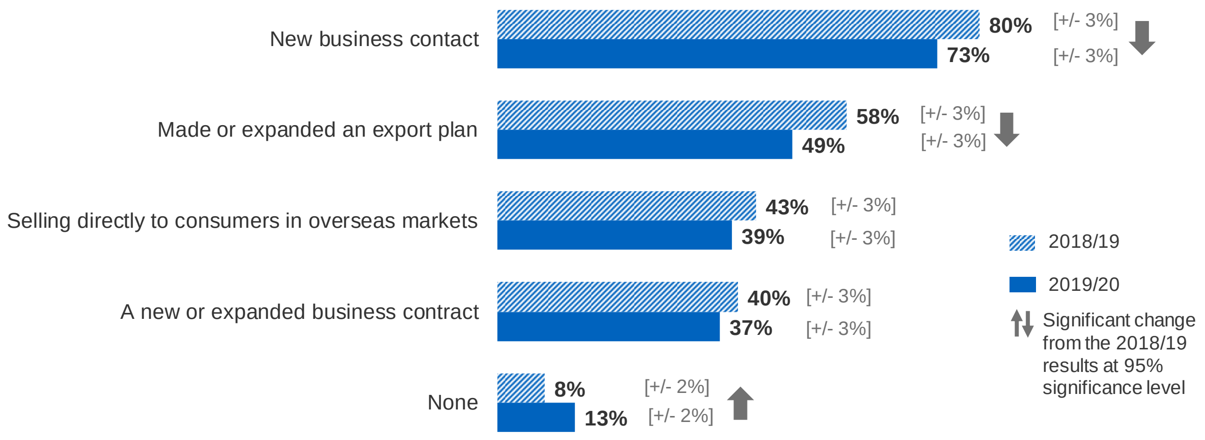
Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 2% of respondents.
Base: All respondents who used ITAs (2018/19: 2001, 2019/20: 2402). Non-exporters (2018/19: 416, 2019/20: 464)

Businesses that reported having identified, or been provided with, new business contacts or export opportunities as part of the service from ITAs were asked **what types of opportunities had been identified** (see Chart 3.2.10).

Respondents were most likely to say that they had identified new business contacts (73%), or were making or expanding an export plan (49%), however there was a significant decrease in the proportion of businesses that had identified these opportunities compared with the previous year, when 80% had identified new business contacts, and 58% were making or expanding an export plan. The proportion of businesses that were selling directly to consumers in overseas markets (39%) and making a new or expanded business contract (37%) remained consistent.

More than one in ten (13%) of respondents reported that they had not identified any of these opportunities, an increase from 2018/19 (8%).

Chart 3.2.10 Opportunities identified as a result of service interaction – ITAs

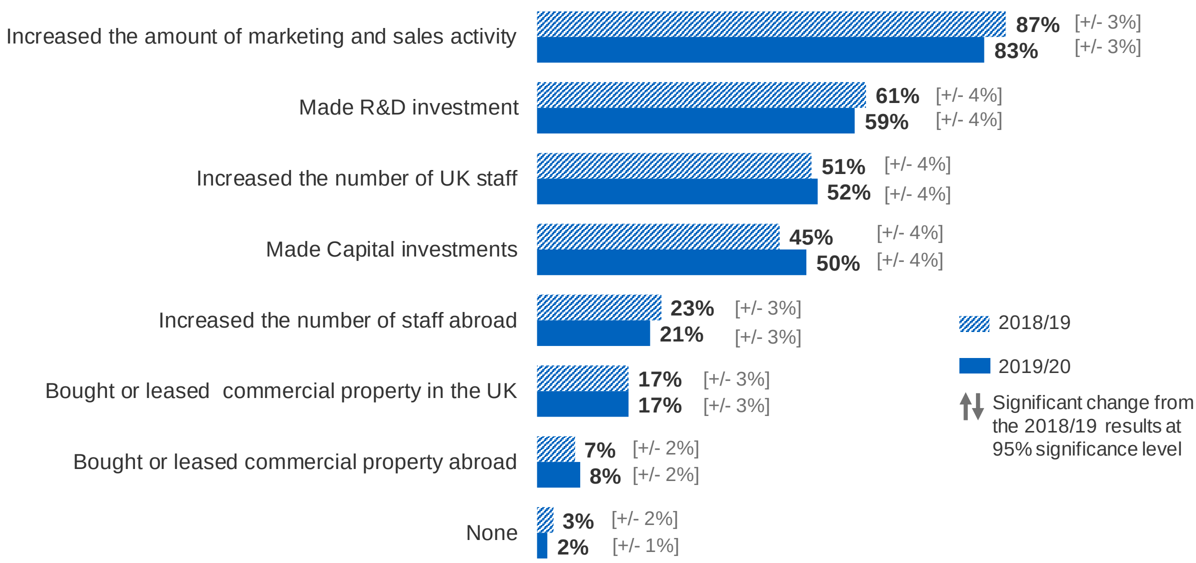


Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used ITAs who had identified a new business contact as part of the DIT service (2018/19:1375, 2019/20: 1440)

Businesses that had identified a new business contact as part of the DIT service (1,041 respondents) were read a list of possible **types of contact** and asked which ones they had made. The most frequently mentioned contact was a buyer (46%), however the proportion who had done so had decreased since 2019/19 from 51%. Around four in ten (43%) said they had made contact with a distributor, and a quarter (26%) had made contact with an agent.

If businesses reported they had made investments to support exporting as a result of using ITAs (694 businesses), they were asked to specify the **type of investment** they had made. Just over eight in ten (83%) said they had increased their marketing and sales activity, while six in ten made a Research and Development investment (59%) and half increased the number of UK staff (52%); see Chart 3.2.11. There were no significant changes since 2018/19.

Chart 3.2.11 Type of investments made as a result of DIT service – ITAs



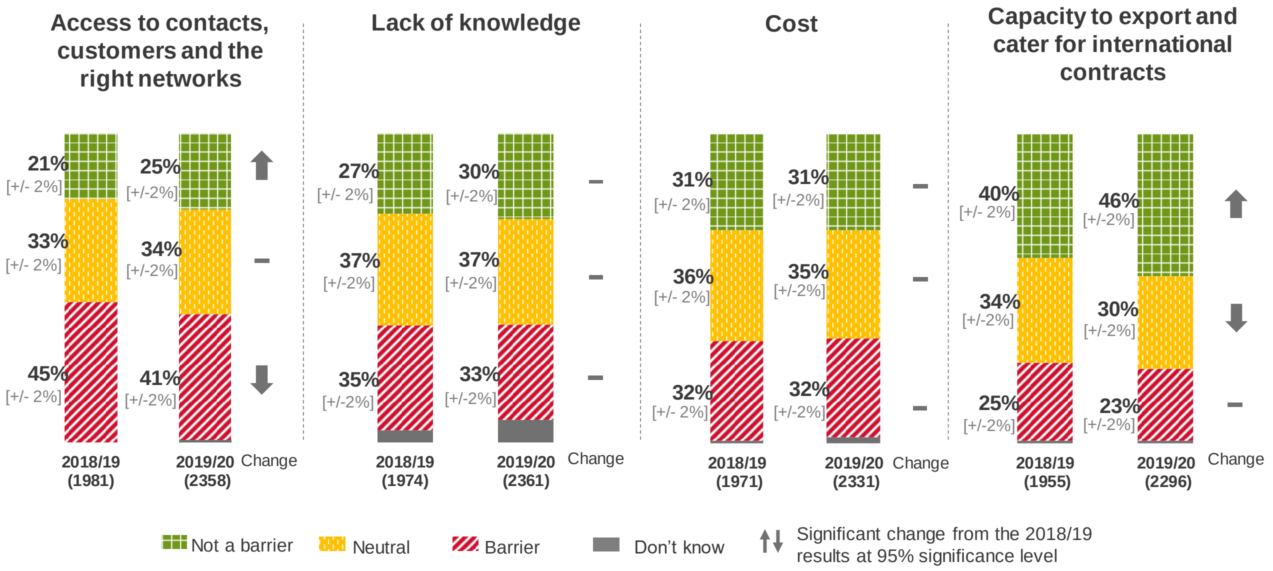
Qresult_invest - Which of the following investments has your business made to support new or increased export opportunities? IF NECESSARY: Please only think about investments relating to export activity. Table is restricted to answers given by more than 3% of respondents. Base: All respondents who had used ITAs and had made investments to support exporting (2018/19: 693, 2019/20: 694)

Businesses with a turnover of £500,000 or more were more likely to have increased the number of UK staff (59%) or bought or leased any commercial property abroad (12%) compared with businesses with a turnover of less than £500,000 (40% and 2% respectively). Businesses that export online were also more likely to have increased the number of UK staff (60% compared with 50% that did not export online). Businesses that sold goods were more likely that businesses that sold services to have made any capital investments (52% compared with 37%).

Businesses were asked about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

Businesses were most likely to say that access to contracts, customers and the right networks was a barrier for their business (41% gave a score of seven or more out of ten), although this was a significant decrease from 45% who said it was a barrier in 2018/19. Around a third said that lack of knowledge (33%) and cost (32%) were barriers. Around quarter (23%) said that capacity to export and cater for international contracts was a barrier. There was a significant increase from 2018/19 of businesses who said that capacity to export and cater for international contracts was *not* a barrier (46%, up from 40% in 2018/19).

Chart 3.2.12 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, except those giving a 'not applicable' answer

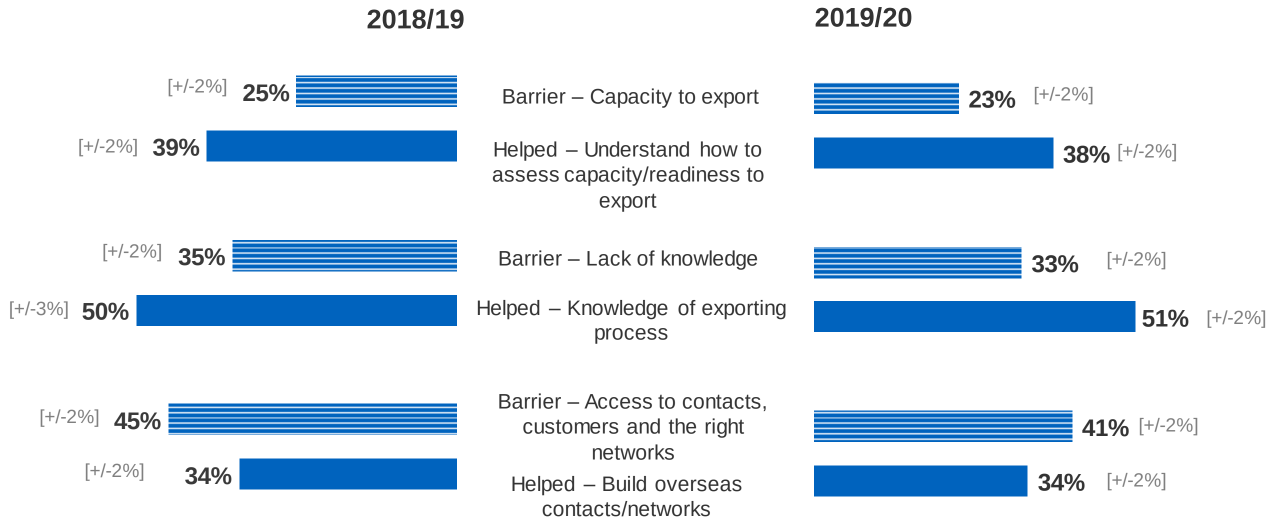
New exporters were more likely to say that lack of knowledge (41%), cost (39%) and capacity (32%) were barriers to exporting. Small and medium enterprises (with fewer than 250 employees) were more likely to say that access to contacts, customers and the right networks was a barrier (41%) compared with large businesses with 250 or more employees (22%).

Businesses selling services were more likely to say that cost was *not* a barrier (40%) compared with businesses selling goods (28%). Businesses that did not export online (51%) and businesses with a turnover of over £500,000 (48%) were more likely to say that capacity of the business to export and cater for international contracts was *not* a barrier (compared with 42% of businesses that export online, and 41% of businesses with a turnover of less than £500,000).

Chart 3.2.13 compares responses to questions on the barriers to exporting (listed above) with business perceptions of how DIT helped them export. Businesses were asked about how DIT, through ITAs, helped them increase their knowledge of export opportunities available and build overseas contacts and networks.

A quarter (23%) said that their capacity to export was a barrier, while a higher proportion (38%) said ITAs helped them understand how to assess their capacity and readiness to export. One in three (33%) said that lack of knowledge was a barrier to exporting; a higher proportion (51%) said that ITAs helped them increase their knowledge of the exporting process. More than four in ten (41%) said that access to contacts, customers and the right networks was a barrier to exporting; a slightly lower proportion (34%) said that ITAs helped build overseas contacts or networks.

Chart 3.2.13 Barriers to exporting and how DIT helped – ITAs



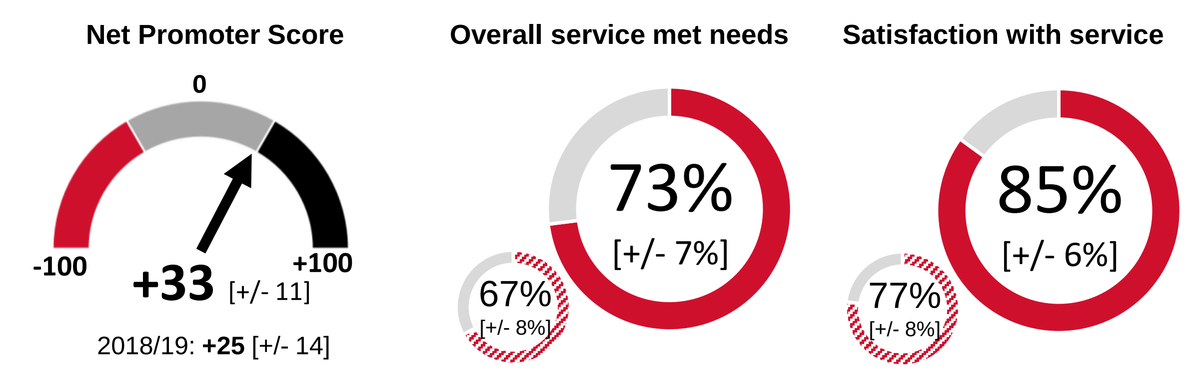
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used ITAs, except those giving a 'not applicable' answer: Capacity 2018/19: 1955, 2019/20: 2296, Lack of knowledge 2018/19: 1974, 2019/20: 2361, Access to contacts, customers and the right networks 2018/19: 1981, 2019/20: 2358.
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: 2018/19: 2001, 2019/20: 2402.

Summary page – Missions

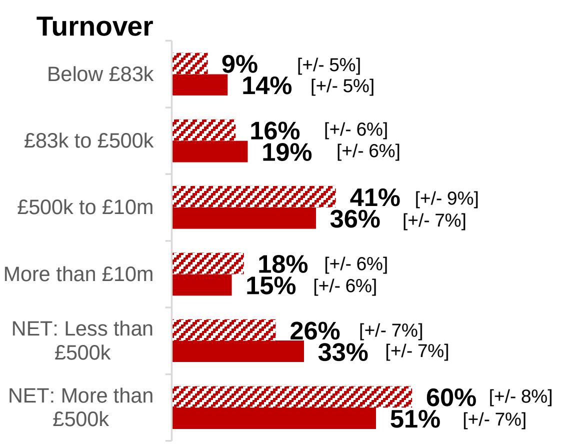
2018/19 result

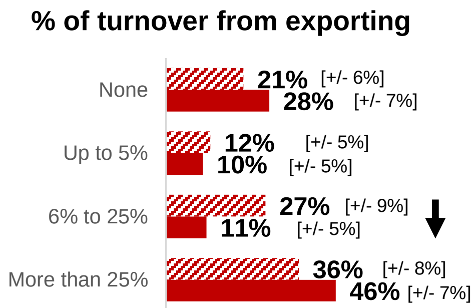
2019/20 result

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

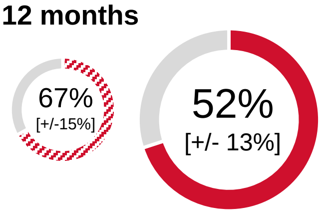


Turnover

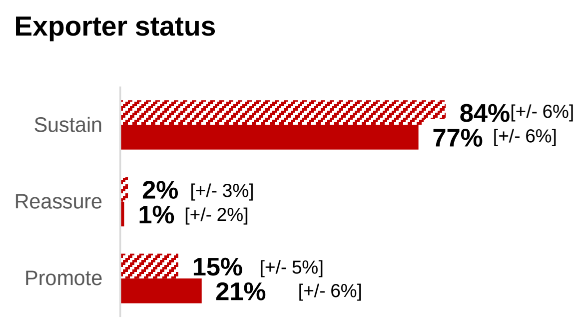




% of businesses who have increased proportion of turnover from exports in last 12 months



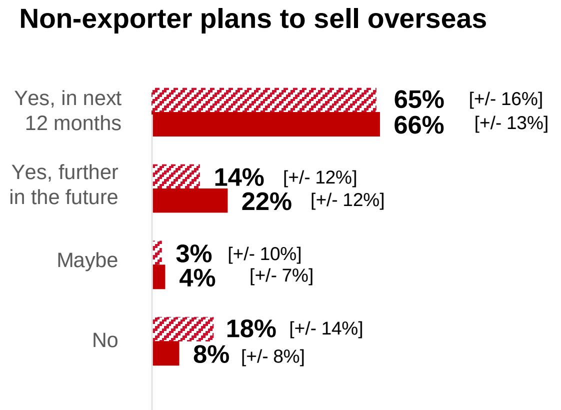
Exporter status



Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before



3.3. 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.

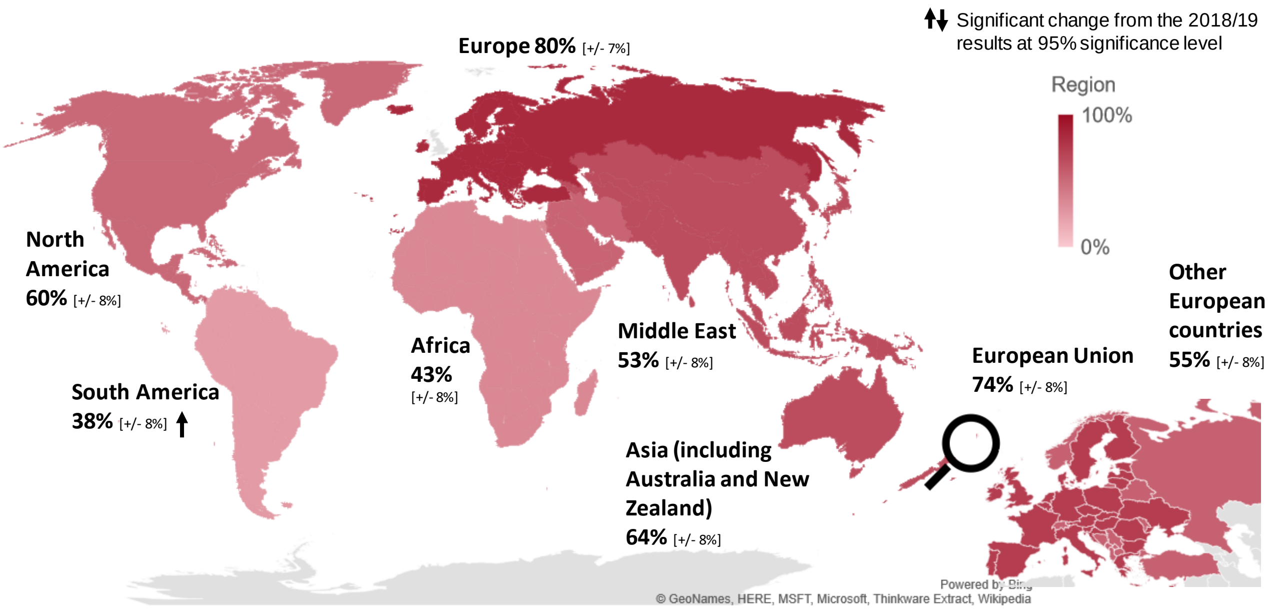
These findings are based on interviews with 189 businesses who used the Missions service in April 2019 to March 2020. Around half (52%) sold goods overseas and two-thirds (64%) sold services (36% only sold goods, 48% only sold services and 17% both).

Throughout this section the findings from businesses that used the Missions service between April 2019 and March 2020 (2019/20) are compared with the 167 businesses interviewed after using the Missions service in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported.

3.3.1. Missions: Business export status

Seventy-seven per cent of businesses currently export by selling goods or services or have done so previously. Of these, three in four businesses (74%) exported within the European Union and over half (55%) sold within the rest of Europe. Around six in ten sold goods or services in Asia (64%) or North America (60%), and around half sold within the Middle East (53%). Around four in ten sold goods or services in Africa (43%), and a similar proportion sold in South America (38%), an increase from 25% in 2018/19.

Chart 3.3.1 Regions organisations exports 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 (147)

Table 3.3.1: Regions organisations exports to or exported to previously - Missions

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Change*
Europe	**84%**	6%	**80%**	7%	-
European Union	**81%**	7%	**74%**	8%	-
Other European countries	**50%**	10%	**55%**	8%	-
Asia (including Australia and New Zealand)	**66%**	10%	**64%**	8%	-
North America	**52%**	10%	**60%**	8%	-
Middle East	**54%**	10%	**53%**	8%	-
Africa	**35%**	9%	**43%**	8%	-
South America	**25%**	8%	**38%**	8%	↑
Base	*141*		*147*		

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Missions and who have exported.
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

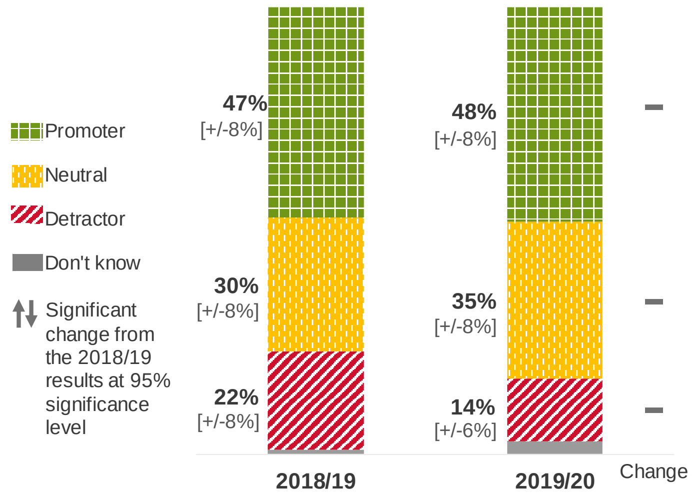
3.3.2. Service performance: Missions

The perceived performance of the service provided by Missions was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experiences of using the Missions service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS). Just under half (48%) were 'Promoters' of Missions (score of nine or ten), while one in seven (14%) were 'Detractors' (score of zero to six) and one in three (35%) were neutral (score of seven or eight); Chart 3.3.2 provides details. Overall, Missions had a positive NPS of +33. These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

Chart 3.3.2 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 in 2018/19 (167), all respondents who used Missions in 2019/20 (189)

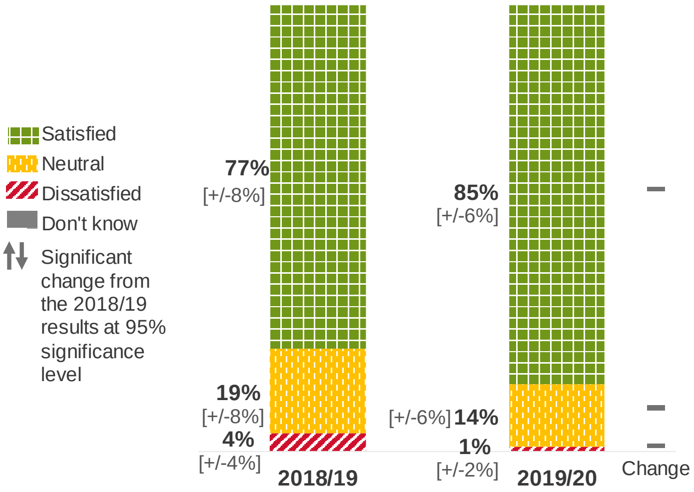
Businesses were asked about ways the service they used **could be improved**. Information was the most frequently reported area for improvement (19%), including ten per cent who said they would like more specific or tailored information. Businesses also mentioned communication (17%), including eight per cent who said that they would like more feedback or follow-up; contacts (10%), including six per cent that requested a wider range or higher quality of leads; and support (ten per cent), including eight per cent who requested more specialist support, advice and help.

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[15].

More than eight in ten businesses (85%) were satisfied with their experience of Missions (rating of seven or more out of ten), and this included around a quarter of businesses (23%) who gave a 'very satisfied' rating (ten out of ten). One per cent of businesses were dissatisfied (rating of three or below) while one in seven businesses (14%) gave a neutral rating (between four and six). There was no noticeable difference by business type, and these figures remain unchanged since 2018/19.

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

Chart 3.3.3 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, except those giving a 'not applicable' answer in 2018/19 (165) and in 2019/20 (183)

Perceptions of advice and support

This section shows how businesses rated the advice and support they received from Missions.

All respondents were asked **what happened when the organisation used the service** (Chart 3.3.4). The chart shows the activities that are most relevant to Missions (above the dotted line)[16], as well as other activities that businesses may have experienced.

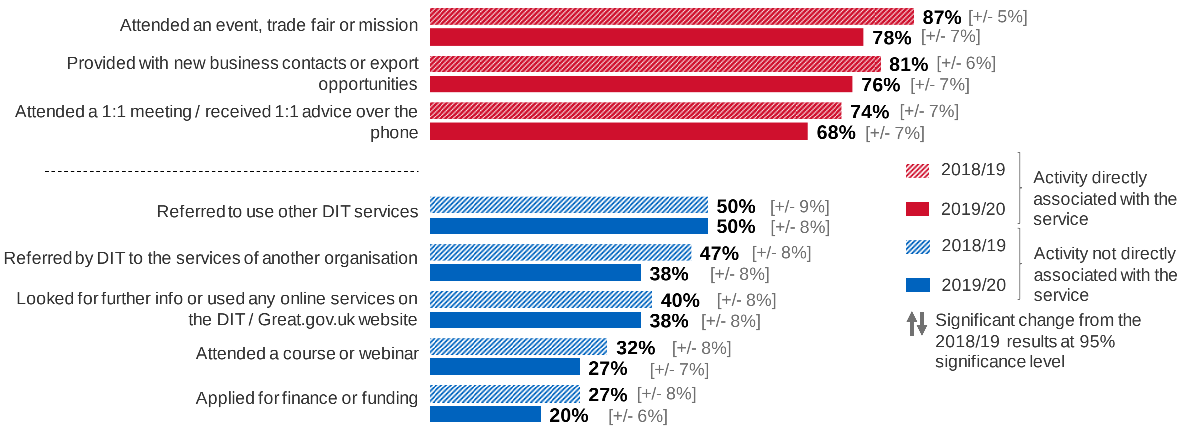
Businesses were most likely to say that they attended an event, trade fair or mission (78%), were provided with new business contacts or export opportunities (76%) or attended a one-to-one meeting or received one-to-one advice over the phone (68%).

Activities that were not directly associated with the service were less likely to be chosen by respondents. Half of businesses had been referred to use other DIT services (50%), while around four in ten had been referred by DIT to the services of another organisation (38%) or had looked for further information or used an online service on the DIT or Great.gov.uk website (38%). Around a quarter had attended a course or webinar (27%). There have not been any significant changes since 2018/19.

There were no noticeable differences by business type.

[16] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.3.4 Specific activities experienced when using Missions



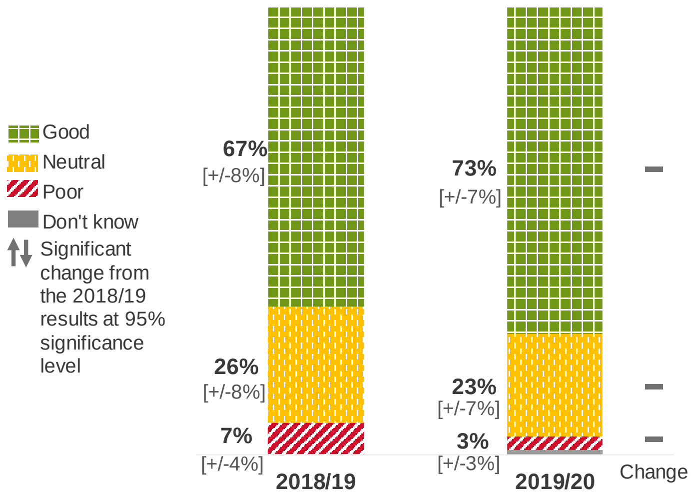
Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used Missions (2018/19: 167, 2019/20: 189)

When asked which **specific types of support** they received as part of Missions, a third (33%) said they received an off-the-shelf overview for existing markets and sectors, while a quarter (26%) received tailored 'route to market' information. Eighteen per cent said they received market information about competition specific to their products or services, and the same proportion said they received support in advocacy, lobbying or supporting a bid.

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.3.5, more than seven in ten (73%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while 23% were neutral (score of four to six), and three per cent said it was poor (rating of zero to three). There were no noticeable differences by business type, and there were no significant changes since 2018/19.

Chart 3.3.5 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? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used Missions, except those giving a 'not applicable' answer in 2018/19 (164) and in 2019/20 (179)

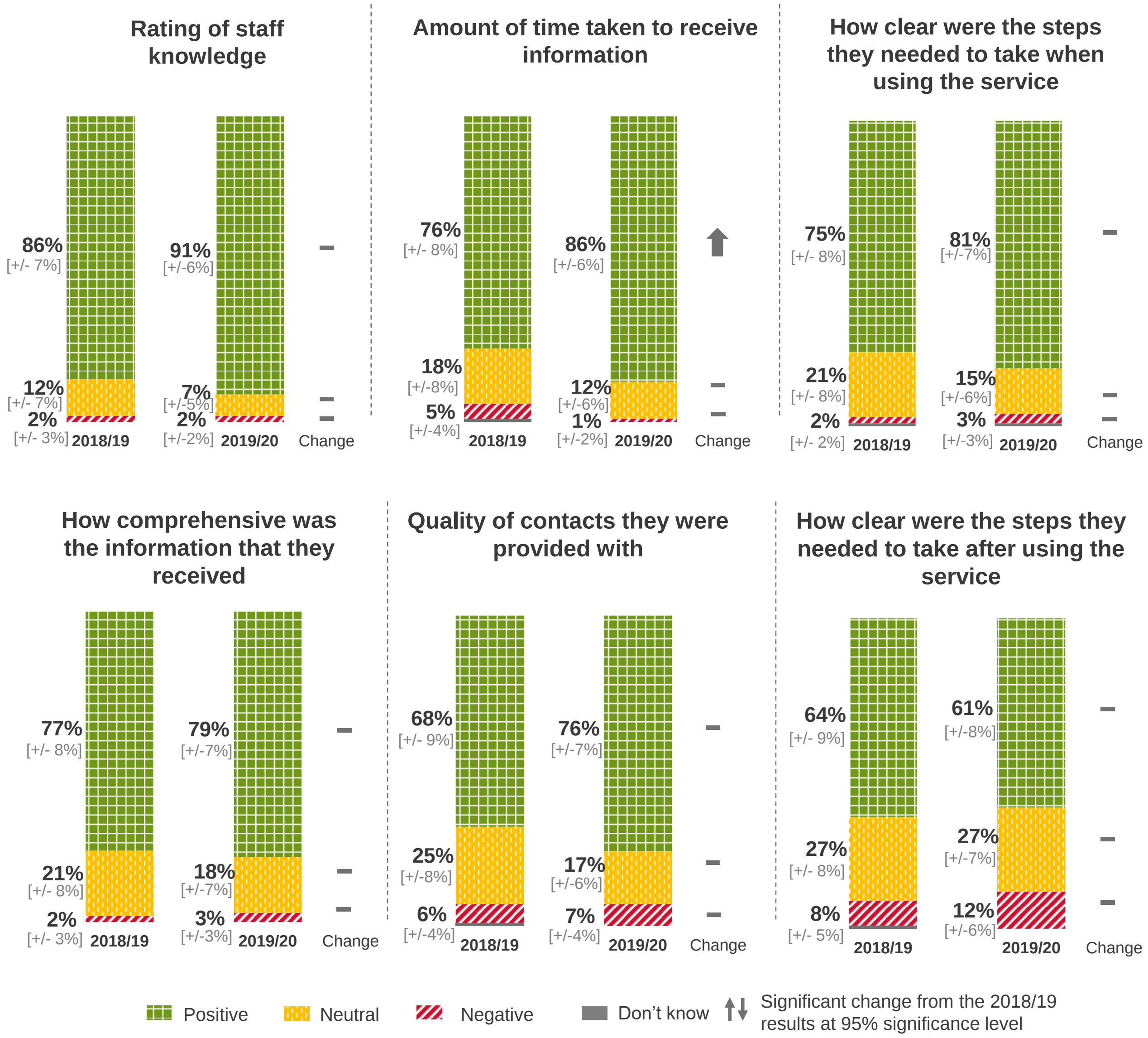
Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Charts 3.3.6 and 3.3.7 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

On each of the measures, more than half of businesses gave positive ratings for their experience of Missions, with the highest ratings given for the registration process (94% rated it as 'straightforward'), the organisation of the service (92% rated it as 'organised'), staff knowledge (91% rated staff as 'knowledgeable') and the time taken to receive information or support (86% rated this as 'acceptable').

Businesses were least likely to give positive ratings for the clarity of the steps they needed to take after using the service (61%).

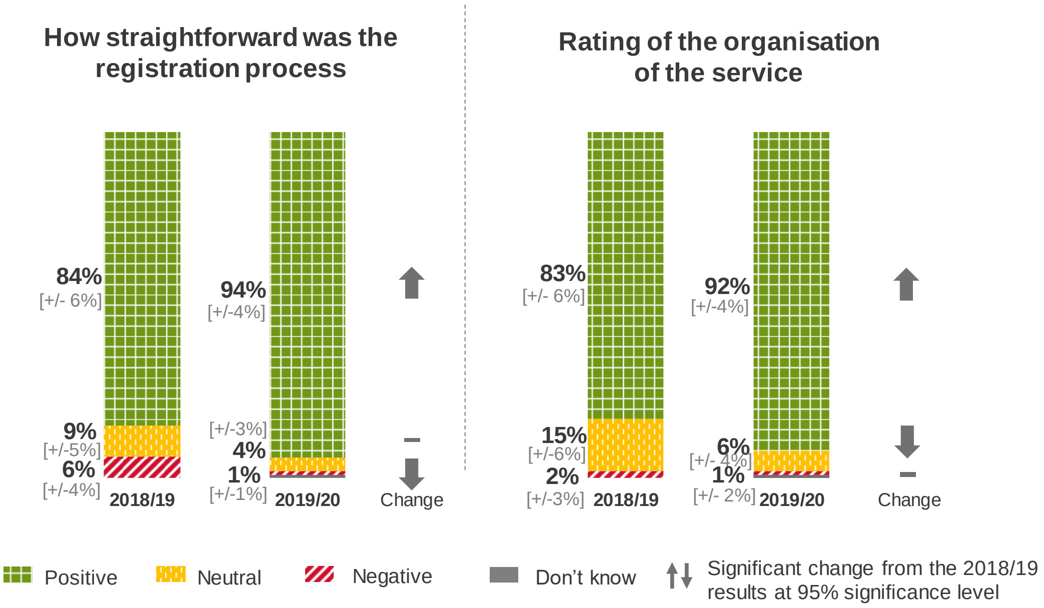
Ratings have become more positive since 2018/19 on a number of items: the amount of time taken to receive information or support (increase in positive ratings from 76% to 86%), the organisation of the service (increase in positive ratings from 83% to 92% and decrease in neutral ratings from 15% to 6%) and the registration process (increase in positive ratings from 84% to 94% and decrease in negative ratings from 6% to 1%).

Chart 3.3.6 Rating by businesses 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? (2018/19: 165, 2019/20: 177). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 162, 2019/20: 172). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 160, 2019/20: 172).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 161, 2019/20: 173). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 159, 2019/20: 174). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 160, 2019/20: 173). Base: All businesses that used Missions, except those giving a 'not applicable' answer.

Chart 3.3.7 Rating by businesses of the organisation of the service and registration process – Missions



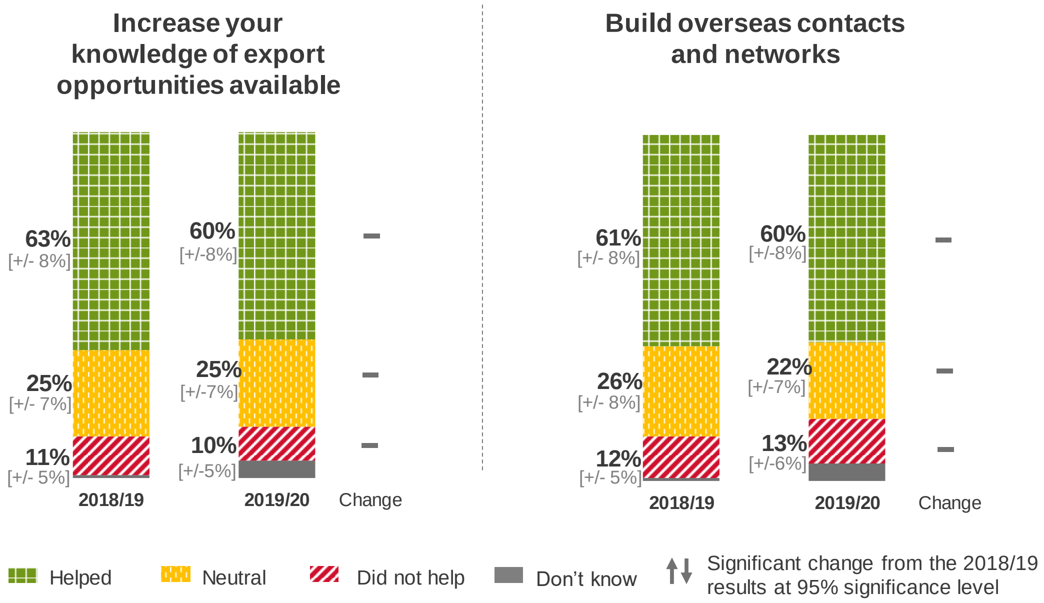
Qevent - How would you rate the organisation of the [SAMPLED SERVICE]? (2018/19: 163, 2019/20: 175).
Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (2018/19: 159, 2019/20: 175),
Base: All respondents that used Missions, except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from ten (helped a lot) to zero (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.3.8 shows the items that were asked of businesses that used Missions. This shows that:

- Six in ten businesses (60%) said that the service helped them by increasing their knowledge of export opportunities available, while one in ten (10%) said the service did not help them in this way.
- Similarly, six in ten businesses (60%) said the service had helped them build overseas contacts and networks, while 13% said they were not helped in this way.

The one noticeable difference by business type was that new exporters were more likely to say that the service helped them by increasing their knowledge of export opportunities available (78%), compared with established exporters (55%). There were no significant changes since 2018/19.

Chart 3.3.8 Perceptions of help Missions provided



Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to …Base All respondents that used Missions in 2018/19 (167) and 2019/20 (189)

Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with Missions.

Businesses carried out a **range of actions as a result of using Missions**. Chart 3.3.9 shows the actions that are most relevant to Missions (above the dotted line)[17], as well as other actions that businesses may have taken.

Looking firstly at the actions that are most relevant to Missions, businesses were most likely to say they had identified new export opportunities or made new contacts (81%), researched the paperwork and regulations needed to export (40%) or made investments to support exporting (28%). A quarter (26%) of businesses said they started or increased exporting.

Other actions (less specific to Missions) included businesses who were not exporting at the time of using the service having assessed the company's readiness to export (59%); this figure should be treated with caution due to the small base size. A quarter (23%) of all businesses had looked for other export support services.

There were no noticeable differences by business type, and there have been no significant changes since 2018/19.

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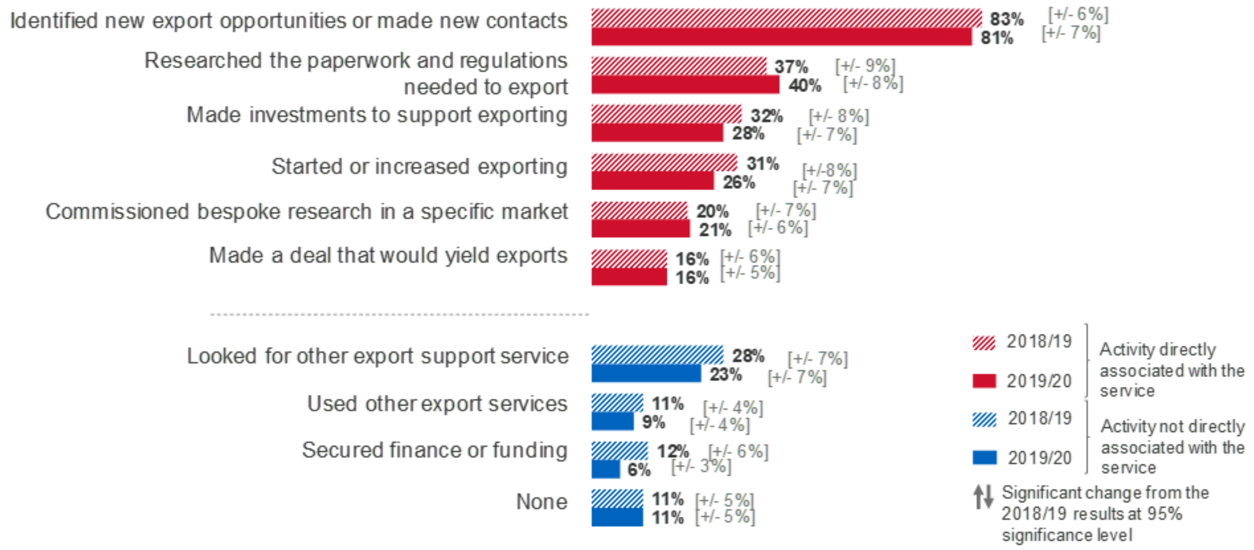
[17] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.3.9 Actions taken as a result of service interaction - Missions



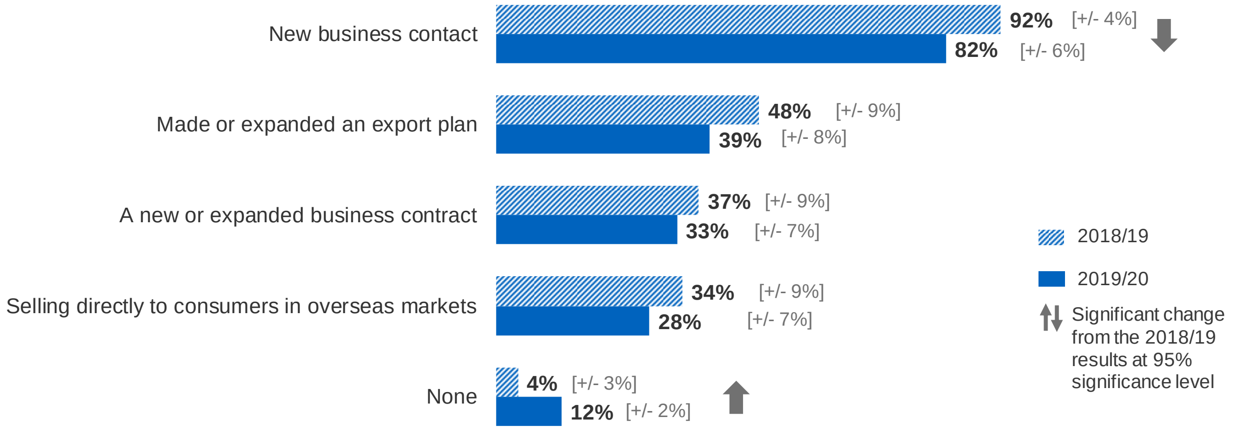
Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 2% of respondents.
Base: All respondents who used Missions (2018/19: 167, 2019/20: 189).

Businesses that reported having identified, or been provided with, new business contacts or export opportunities as part of the service from Missions were asked **what types of opportunities had been identified** (see Chart 3.3.10).

Respondents were most likely to say that they had identified new business contacts (82%), although this was a decrease from 92% in 2018/19. Four in ten (39%) had made or expanded a business plan, while 33% made a new or expanded business contract and 28% sold directly to consumers in overseas markets.

More than one in ten (12%) respondents reported that they had not identified any of these opportunities, an increase from 2018/19 (4%).

Chart 3.3.10 Opportunities identified as a result of service interaction – Missions



Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used Missions who had identified a new business contact as part of the DIT service (2018/19:151, 2019/20: 175)

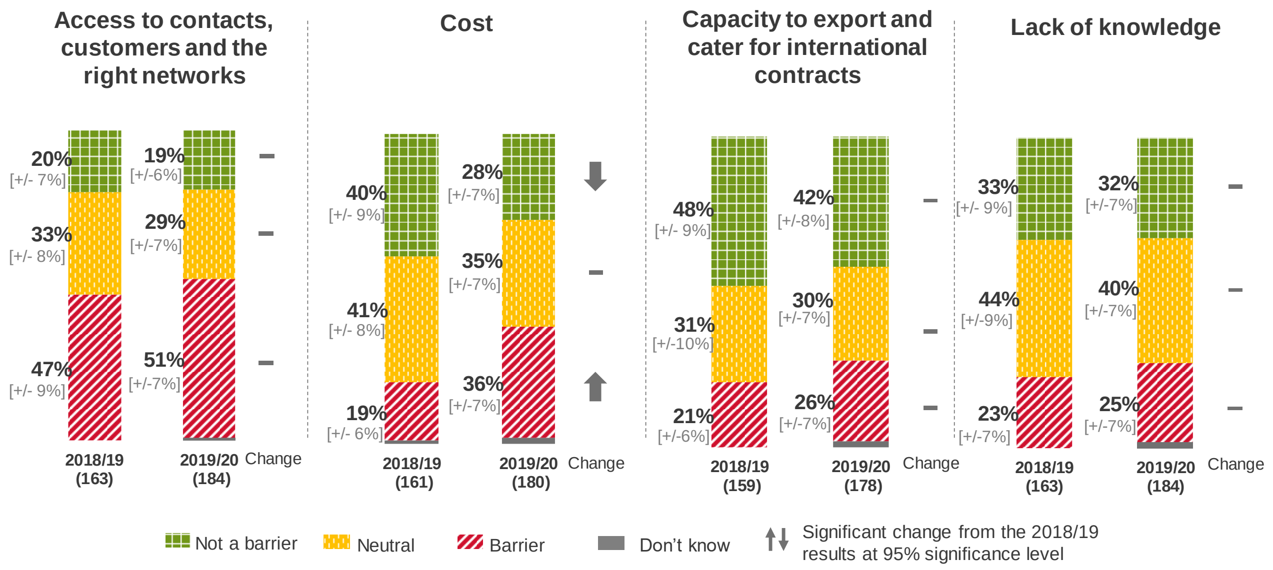
Businesses that had identified a new business contact as part of attending a Mission (141 respondents) were read a list of **types of contact** and asked which ones they had made. Businesses were most likely to say that they had made contact with a buyer (53%), while 41% had made contact with a distributor, 22% with an agent and 18% with a third-party legal advisor. There were no significant changes since 2018/19.

Businesses were asked about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

Access to contacts, customers and the right networks was the largest barrier for businesses. Specifically:

- Access to contacts, customers and the right networks was described as a barrier by half (51%) of businesses, while two in ten (19%) said it was not a barrier.
- Around a third of businesses (36%) described cost as a barrier, a significant increase from 19% in 2018/19. Around a quarter (28%) said it was not a barrier, a decrease from 40% in 2018/19.
- A quarter of businesses (26%) described capacity to export and cater for international contracts as a barrier, while 42% said it was not a barrier.
- A quarter (25%) described lack of knowledge as a barrier, whilst a third (32%) said it was not a barrier.

Chart 3.3.11 Barriers to exporting – Missions

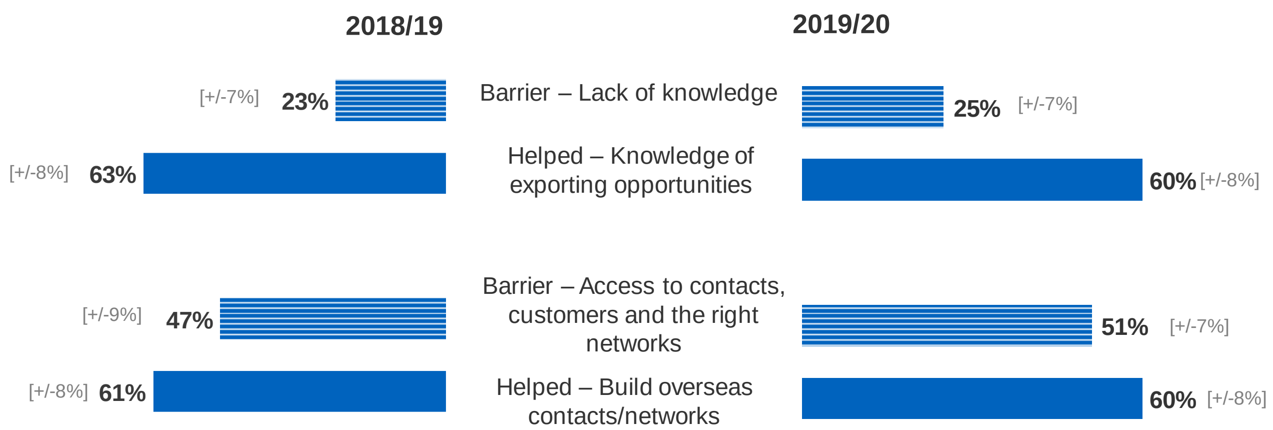


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Missions, except those giving a 'not applicable' answer

Chart 3.3.12 compares responses to questions on the barriers to exporting (listed above) with business perceptions of how DIT helped them export. Businesses that were interviewed about Missions were asked about how DIT helped them increase their knowledge of exporting opportunities and build overseas contacts and networks.

One in four businesses (25%) said that a lack of knowledge was a barrier for their business, while 60% said that Missions had helped them to increase knowledge of exporting opportunities. Around half (51%) of businesses said that access to contacts, customers and the right networks was a barrier for their business; 60% of businesses said that Missions had helped them to build overseas contacts and networks.

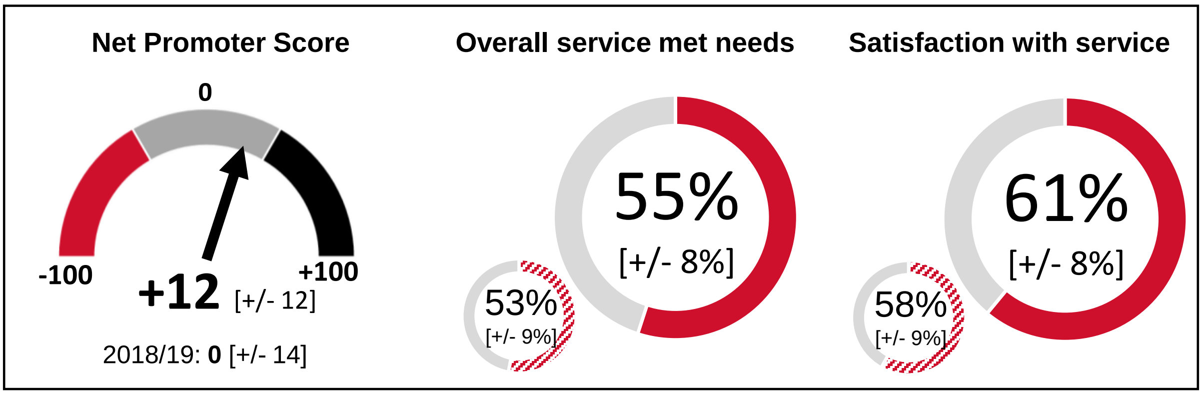
Chart 3.3.12 Barriers to exporting and how DIT helped – Missions



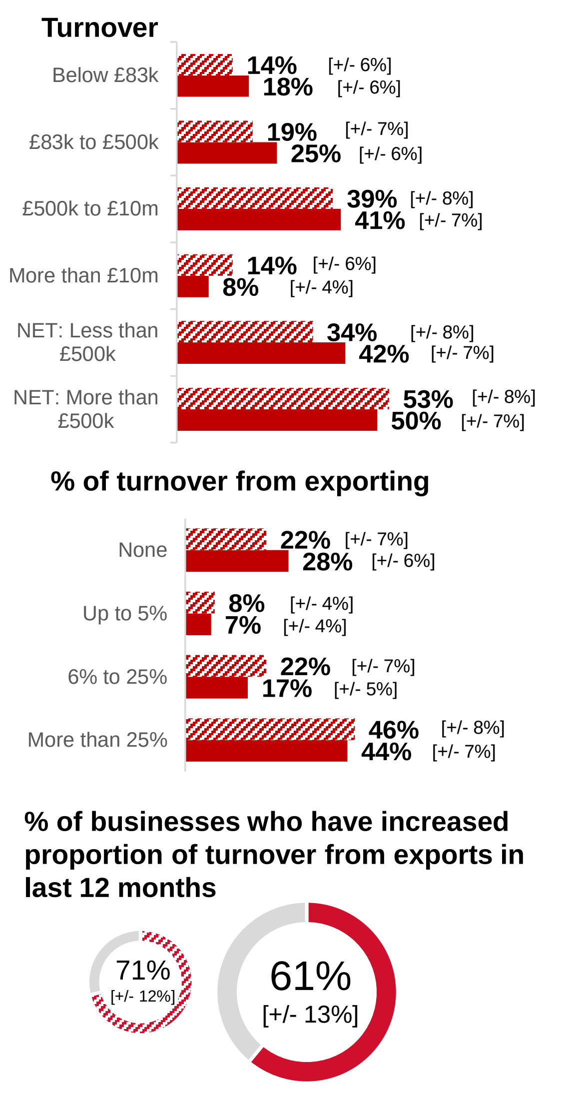
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Missions, except those giving a 'not applicable' answer: Lack of knowledge 2018/19: 163, 2019/20: 184, Access to contacts, customers and the right networks 2018/19: 163, 2019/20: 184.
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 exporting opportunities / Build overseas contacts and networks. Base: All respondents who used Missions: 2018/19: 167, 2019/20: 189.

Summary page – OBNI

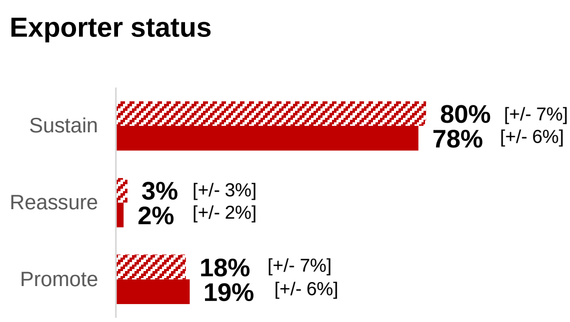
2018/19 result
2019/20 result
Significant change from the 2018/19 results at 95% significance level



Turnover



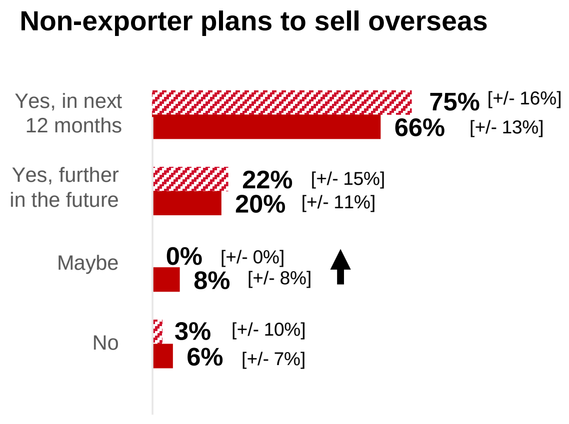
Exporter status



Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before



3.4. 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 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.

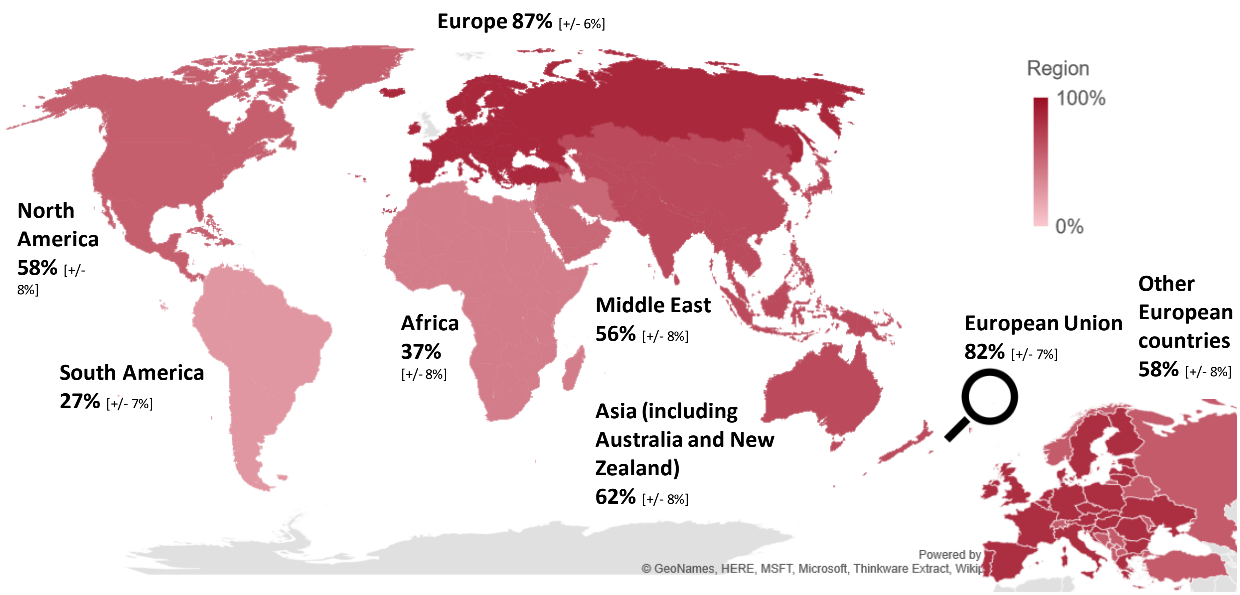
These findings are based on interviews with 198 businesses who used the OBNI service in April 2019 to March 2020. Three-quarters (74%) sold goods overseas and a third (37%) sold services (63% only sold goods, 26% only sold services and 11% sold both).

Throughout this section the findings from businesses that used the OBNI service between April 2019 and March 2020 (2019/20) are compared with the 154 businesses interviewed after using the OBNI service in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported.

3.4.1. OBNI: Business export status

Seventy-eight per cent of businesses currently export by selling goods or services or have done so previously. Of these, eight in ten (82%) sold within the European Union and six in ten (58%) have sold within the rest of Europe. Around six in ten (62%) sold in Asia, including Australia and New Zealand, while over half sold in North America (58%) or the Middle East (56%). Less than half of businesses sold in Africa (37%) or South America (27%). There have been no significant changes since 2018/19.

Chart 3.4.1 Regions organisations exports 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 (160)

Table 3.4.1: Regions organisations exports to or exported to previously – OBNI

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Significant Change*
Europe	**85%**	6%	**87%**	6%	-
European Union	**84%**	7%	**82%**	7%	-
Other European countries	**58%**	9%	**58%**	8%	-
Asia (including Australia and New Zealand)	**67%**	8%	**62%**	8%	-
North America	**56%**	9%	**58%**	8%	-
Middle East	**52%**	9%	**56%**	8%	-
Africa	**41%**	9%	**37%**	8%	-
South America	**27%**	8%	**27%**	7%	-
Base	*129*		*160*		

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used OBNI and who have exported.
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

3.4.2. Service performance: OBNI

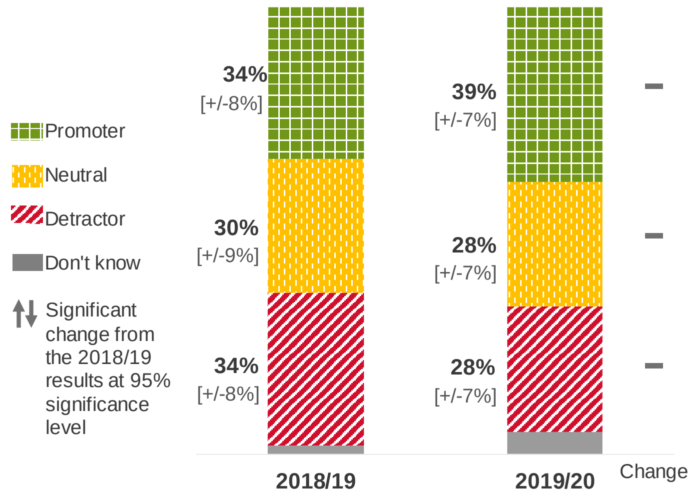
The perceived performance of the service provided by OBNI was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experiences of using the OBNI service, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS). Around four in ten (39%) were 'Promoters' of OBNI (score of nine or ten), while around three in ten (28%) were 'Detractors' (score of zero to six) and the same proportion (28%) were neutral (score of seven or eight); Chart 3.4.2 provides details. Overall, OBNI had a positive NPS of +12. There have been no significant changes since 2018/19.

Analysis by type of business indicates that businesses with a turnover of under £500,000 were more likely to be 'Promoters' of OBNI (51%), compared with businesses with a turnover of £500,000 or more (33%). Online exporters were also more also to be 'Promoters' (51% compared with 28% of those that did not export online).

Chart 3.4.2 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 in 2018/19 (154), all respondents who used OBNI in 2019/20 (198)

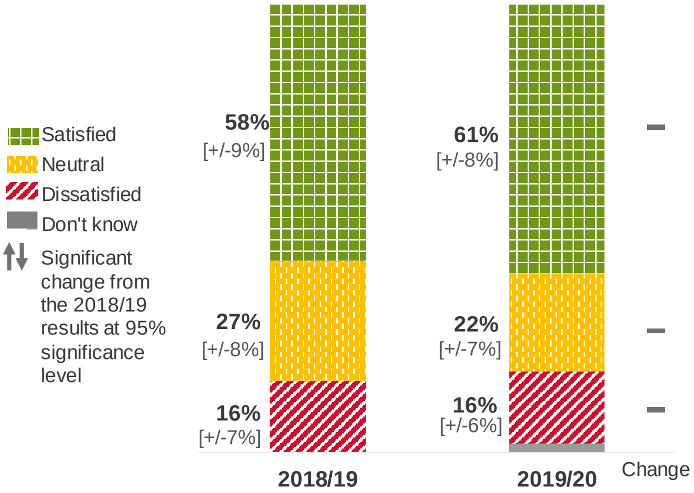
Businesses were asked about ways the service they used **could be improved**. Information was the most frequently reported area for improvement (23%), including nine per cent who said they would like more specific or tailored information. Businesses also mentioned staff (18%), including requests for more knowledgeable staff (9%) and staff with a better understanding of the market or the current climate (8%); communication (14%), including seven per cent who said that they would like more feedback or follow-up; and support (13%), including 11% who requested more specialist support. A quarter (24%) cited ‘none’ when asked how the service could be improved.

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[18].

Six in ten businesses (61%) were satisfied with their experience of OBNI (rating of seven or more out of ten). One in six businesses (16%) were dissatisfied (rating of three or below), while 22% gave a neutral rating (between four and six). There was no noticeable difference by business type, and these figures remain unchanged since 2018/19.

[18] Here and throughout the report, businesses who gave an answer of ‘not applicable’ have been excluded from the analysis.

Chart 3.4.3 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, except those giving a 'not applicable' answer in 2018/19 (150) and in 2019/20 (188)

Perceptions of advice and support

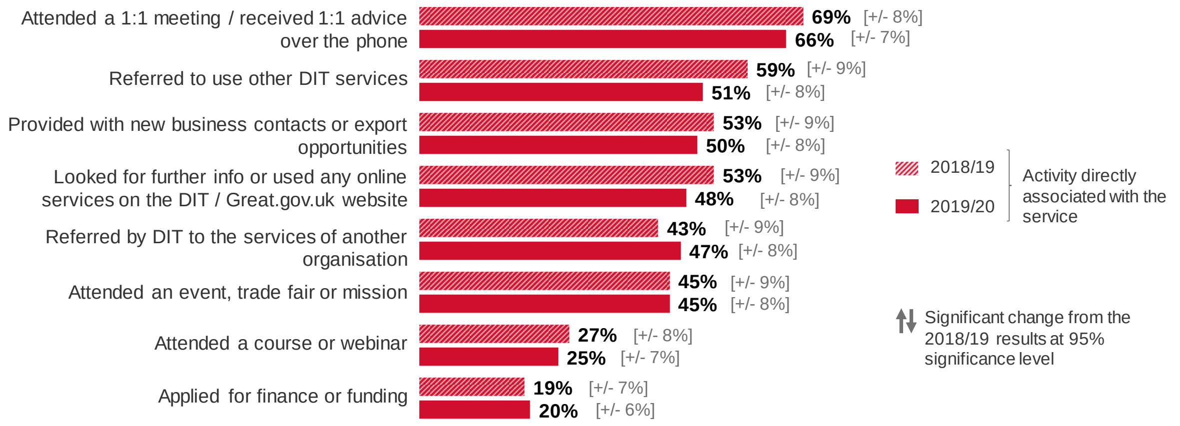
This section shows how businesses rated the advice and support they received from OBNI.

All respondents were asked **what happened when the organisation used the service** (Chart 3.4.4). The chart shows the various activities, all of which are relevant to OBNI[19].

Businesses were most likely to have attended a one-to-one meeting or received one-to-one advice over the phone (66%), while a number of activities were experienced by around half of businesses: being referred to other DIT services (51%), being provided with new business contacts or export opportunities (50%), looking for further information or using any online services on the DIT or Great.gov.uk website (48%), being referred to the services of another organisation (47%) and attending an event, trade fair or mission (45%). There were no noticeable differences by business type, and there have not been any significant changes since 2018/19.

[19] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.4.4 Specific activities experienced when using OBNI



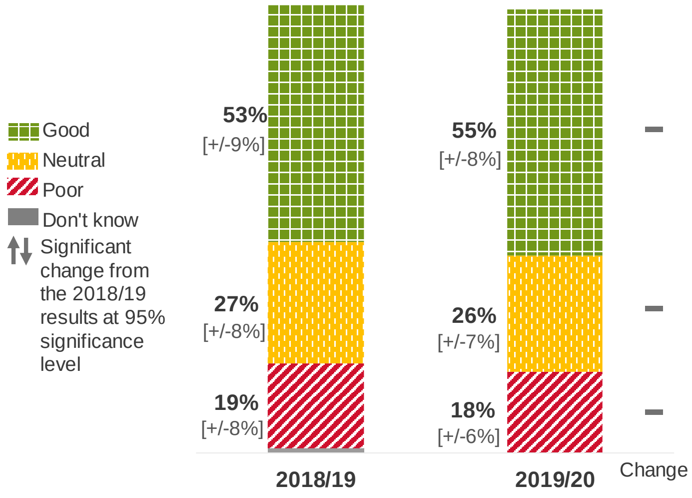
Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used Missions (2018/19: 154, 2019/20: 198)

When asked which **specific types of support** they received as part of the OBNI service, around one in three (35%) said they received an off-the-shelf overview for existing markets and sectors, while around one in five received tailored 'route to market' information (22%) or market information about competition specific to their products or services (19%).

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.4.5, just over half of businesses (55%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while around a quarter (26%) were neutral (score of four to six) and around one in five (18%) said it was poor (rating of zero to three). There were no noticeable differences by business type, and there were no significant changes since 2018/19.

Chart 3.4.5 Rating of whether overall service met needs – OBNI



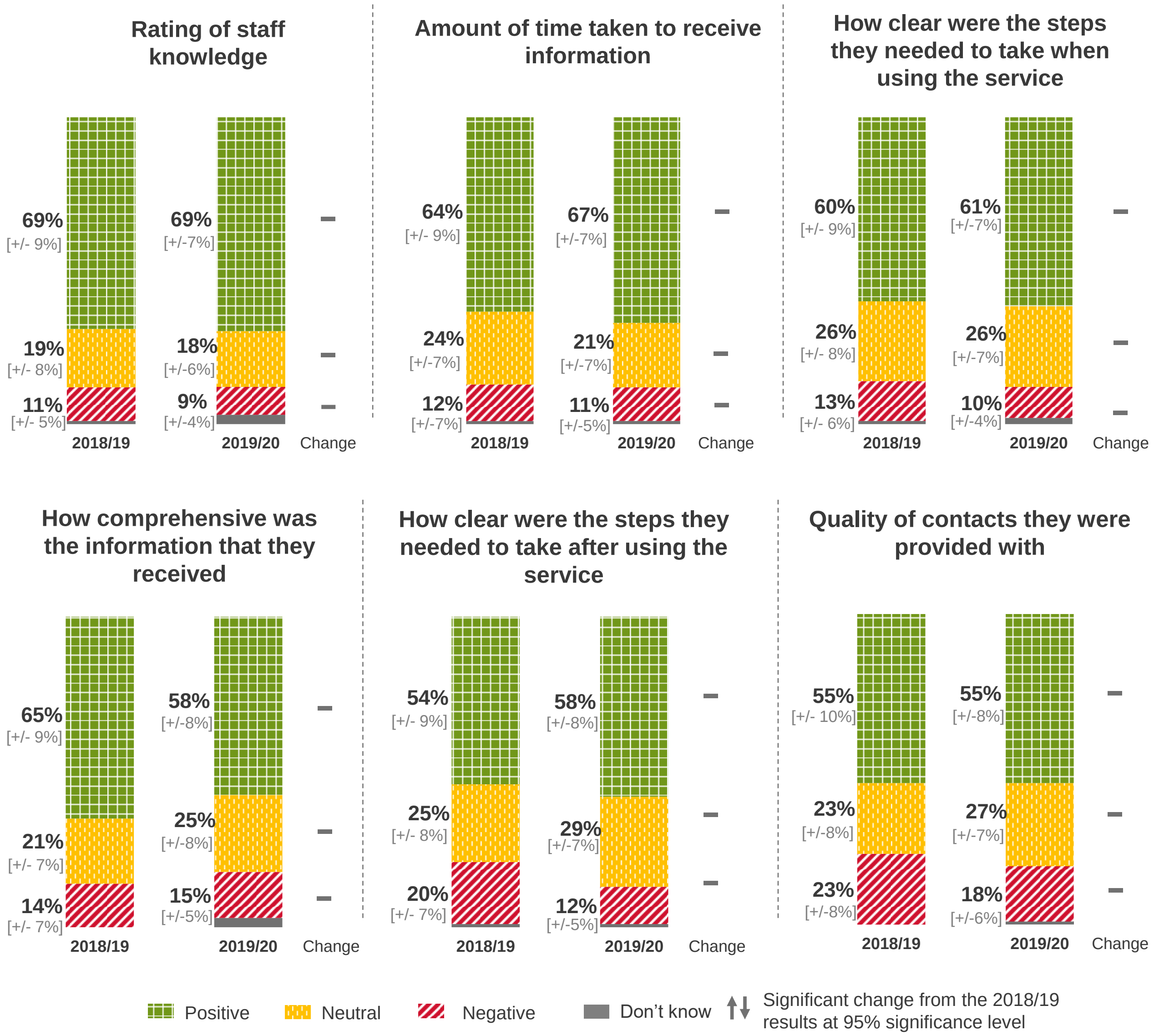
Qqualinfo - Using that same scale, how would you rate... The extent to which the overall service received met your needs? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used OBNI, except those giving a 'not applicable' answer in 2018/19 (146) and in 2019/20 (188)

Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Chart 3.4.6 and Chart 3.4.7 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

On each of the measures, more than half of businesses gave positive ratings for their experience of OBNI. The highest ratings were given for satisfaction with staff knowledge (69% rated staff as 'knowledgeable') and the time taken to receive information or support (67% rated this as 'acceptable').

Businesses gave lower ratings for the quality of contacts they were provided with (55%), how comprehensive the information was (58%) and the clarity of the steps they needed to after using the service (53%).There were no significant changes since 2018/19.

Chart 3.4.6 Rating by businesses 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? (2018/19: 138, 2019/20: 177). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 147, 2019/20: 184). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 139, 2019/20: 179).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 148, 2019/20: 181). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 130, 2019/20: 173). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 144, 2019/20: 176). Base: All businesses that used OBNI, except those giving a 'not applicable' answer.

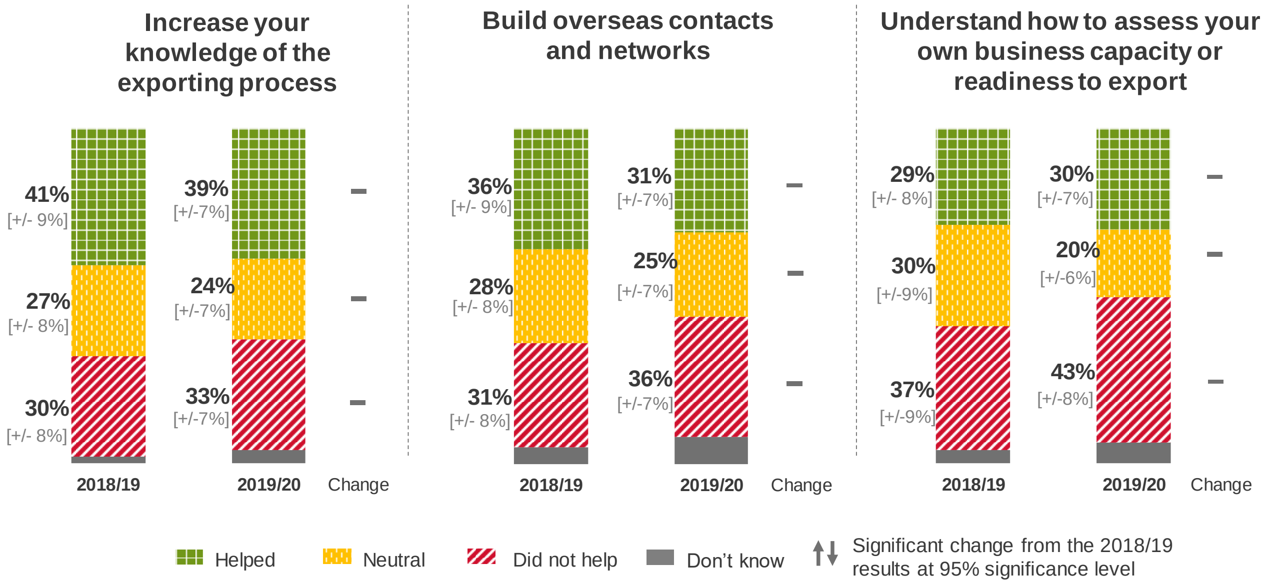
Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from ten (helped a lot) to zero (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.4.7 shows the items that were asked of businesses that used OBNI. This shows that:

- Around four in ten businesses that had used OBNI (39%) said that the service helped them by increasing their knowledge of the exporting process, while one in three (33%) said the service did not help them in this way.
- Three in ten businesses that had used OBNI (31%) said that the service helped to build overseas contacts and networks, while a slightly higher proportion (36%) said that OBNI did not help them in this way.

- Similarly, three in ten businesses (30%) said that the service had helped them to understand how to assess their own business capacity or readiness to export, while a higher proportion (43%) said they were not helped in this way.

There were no noticeable differences by business type, and there were no significant changes since 2018/19.

Chart 3.4.7 Perceptions of help OBNI provided



Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to …Base All respondents that used OBNI in 2018/19 (154) and 2019/20 (198)

Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with OBNI.

Businesses carried out a **range of actions as a result of using OBNI**. Chart 3.4.8 shows the various actions, all of which are relevant to OBNI[20]. Businesses were most likely to say they identified new export opportunities or made new contacts (58%) or researched the paperwork and regulations needed to export (48%). Around three in ten looked for other export support services (31%), started or increased exporting (30%) or made investments to support exporting (30%).

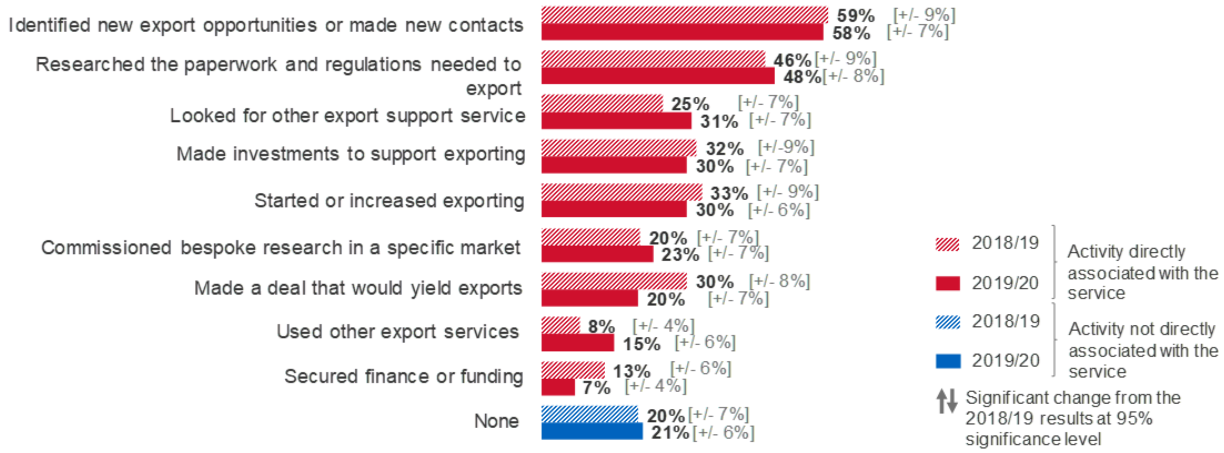
Around half (53%) of businesses who were not exporting at the time of using the service had assessed the company's readiness to export; this figure should be treated with caution due to the small base size.

Analysis by business type indicates that online exporters were more likely to have started or increased exporting (44% compared with 24% of those that did not export online), while those exporting only goods were more likely to have researched the paperwork and regulations needed

[20] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

to export (57% compared with 35% of those exporting services or both goods and services). There have been no significant changes since 2018/19.

Chart 3.4.8 Actions taken as a result of service interaction - OBNI



Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 2% of respondents.
Base: All respondents who used OBNI (2018/19: 154, 2019/20: 198).

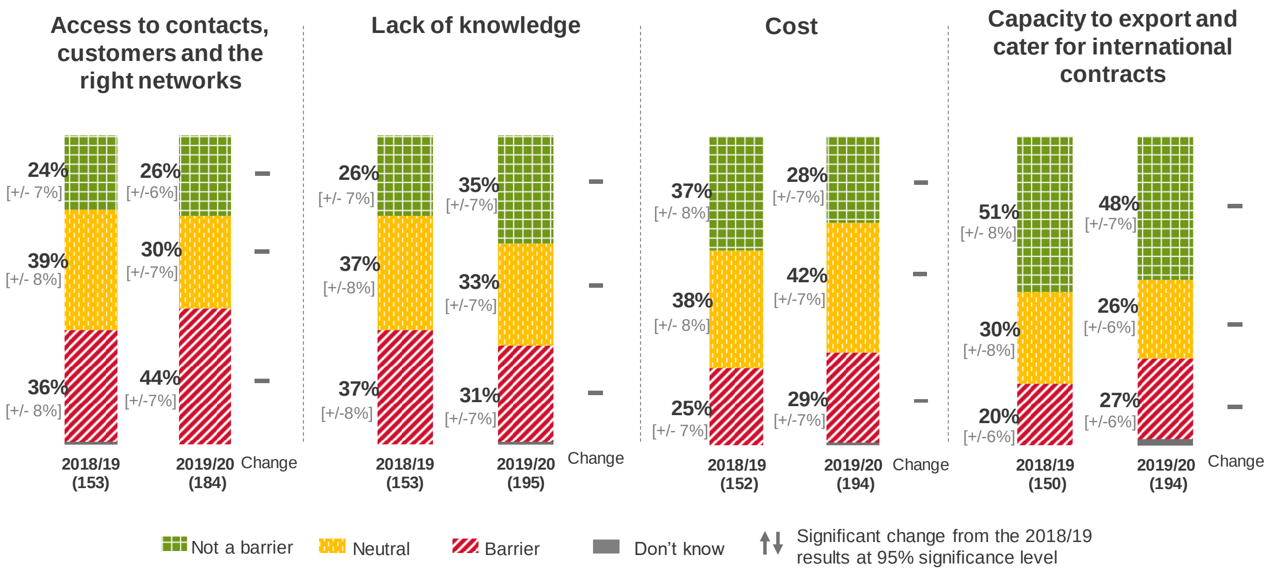
Businesses were asked about four **potential barriers for their business in relation to exporting** and how much of a barrier they considered each one to be for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

Access to contacts, customers and the right networks was the largest barrier for businesses. Specifically:

- Access to contacts, customers and the right networks was described as a barrier by almost half (44%) of businesses, while a quarter (26%) said it was not a barrier.
- Three in ten (31%) described lack of knowledge as a barrier, while 35% said it was not a barrier.
- Three in ten (29%) described cost as a barrier, while a similar proportion (28%) said it was not a barrier.
- Around a quarter of businesses (27%) described capacity to export and cater for international contracts as a barrier, while half (48%) said it was not a barrier.

There were no significant changes since 2018/19.

Chart 3.4.9 Barriers to exporting – OBNI

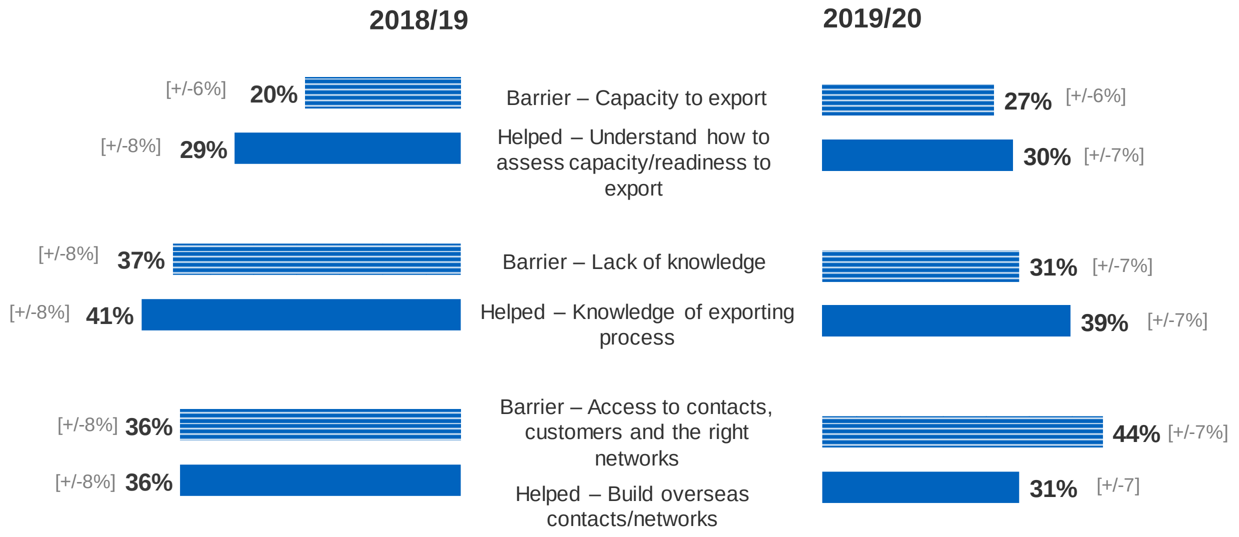


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OBNI, except those giving a 'not applicable' answer

Chart 3.4.10 compares responses to questions on the barriers to exporting listed above with business perceptions of how DIT helped them export. Businesses that were interviewed about OBNI were asked about how DIT helped them increase their knowledge of the exporting process, understand how to assess their own business capacity or readiness to export, and build overseas contacts and networks.

Around three in ten businesses (30%) said that the OBNI helped them to understand how to assess capacity or readiness to export, and a similar proportion (27%) said that their capacity to export was a barrier. Three in ten (31%) thought that a lack of knowledge was a barrier to exporting, and four in ten (39%) said that OBNI helped increase their knowledge of the exporting process. Almost half (44%) thought that access to contacts, customers and the right networks was a barrier to exporting, higher than the proportion that thought OBNI helped build overseas contacts or networks (31%).

Chart 3.4.10 Barriers to exporting and how DIT helped – OBNI



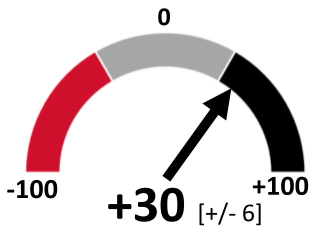
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OBNI, except those giving a 'not applicable' answer: Capacity 2018/19: 150, 2019/20: 194, Lack of knowledge 2018/19: 153, 2019/20: 195, Access to contacts, customers and the right networks 2018/19: 153, 2019/20: 195.

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 OBNI: 2018/19: 154, 2019/20: 198.

Summary page – Posts

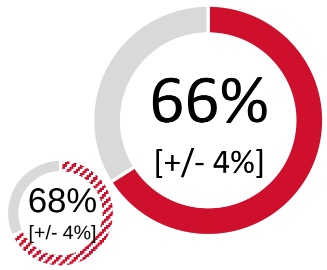
2018/19 result
2019/20 result
Significant change from the 2018/19 results at 95% significance level

Net Promoter Score

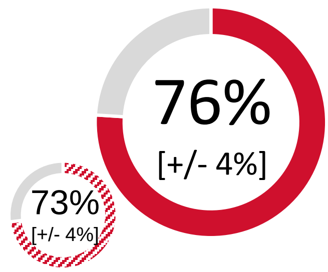


2018/19: **27** [+/- 6]

Overall service met needs

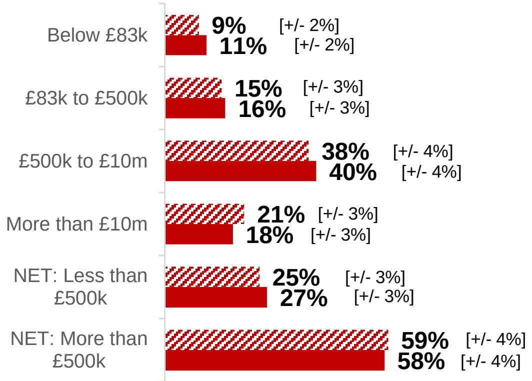


Satisfaction with service

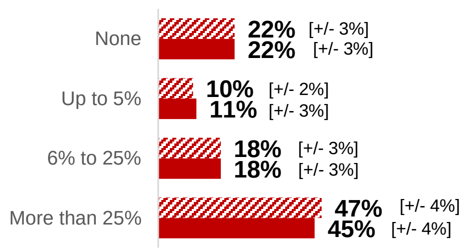


Turnover

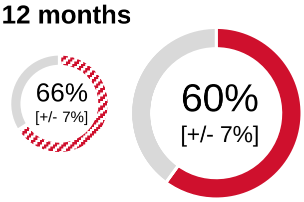
Turnover



% of turnover from exporting

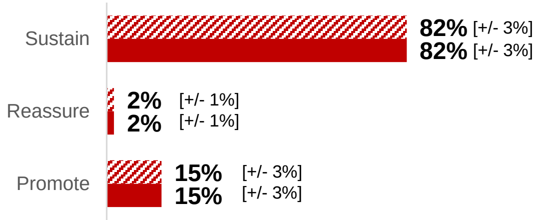


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

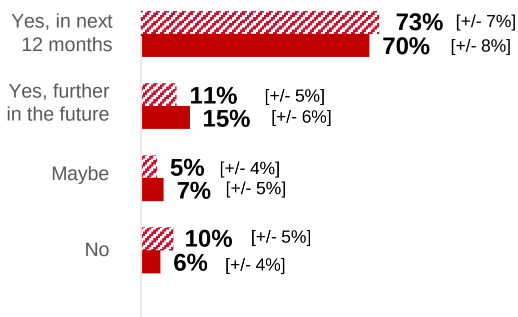


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.5. Posts

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.

These findings are based on interviews with 765 businesses who used the Posts service in April 2019 to March 2020. Two-thirds (65%) sold goods overseas and around half (51%) sold services (49% only sold goods, 35% only sold services and 16% both).

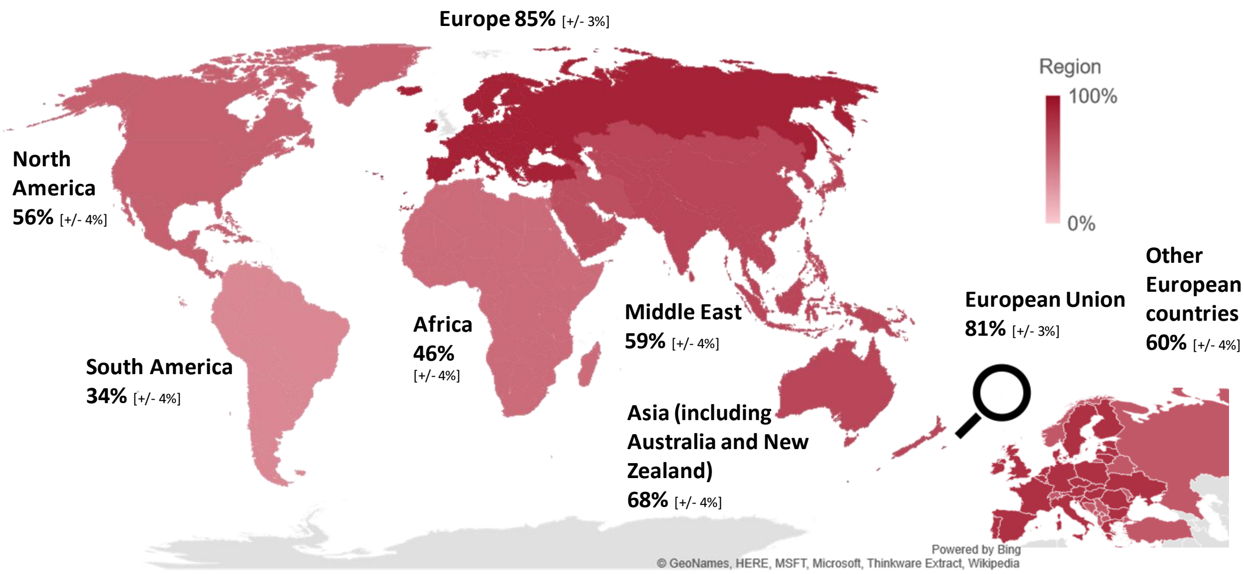
Service delivery data entry practices differ across overseas Posts. As a result, findings only cover those overseas Posts that enter their service delivery data onto DIT's client relationship management system on a consistent and timely basis.

Throughout this section the findings from businesses that used the Posts service between April 2019 and March 2020 (2019/20) are compared with the 748 businesses interviewed after using the Posts service in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported.

3.5.1. Posts: Business export status

In total, 82% of businesses currently export by selling goods or services or have done previously. Of these, eight in ten (81%) have sold within the European Union and six in ten (60%) sold within the rest of Europe. More than half of businesses sold goods or services in Asia (68%), the Middle East (59%) or North America (56%), while just under half (46%) sold in Africa. The least common area was South America (34%).

Chart 3.5.1 Regions organisations exports 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 (654)

Table 3.5.1: Regions organisations exports to or exported to previously - Posts

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Significant Change*
Europe	**88%**	3%	**85%**	3%	-
European Union	**83%**	3%	**81%**	3%	-
Other European countries	**64%**	4%	**60%**	4%	-
Asia (including Australia and New Zealand)	**69%**	4%	**68%**	4%	-
Middle East	**64%**	4%	**59%**	4%	-
North America	**55%**	4%	**56%**	4%	-
Africa	**49%**	4%	**46%**	4%	-
South America	**35%**	4%	**34%**	4%	-
Base	*630*		*654*		

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Posts and who have exported.
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

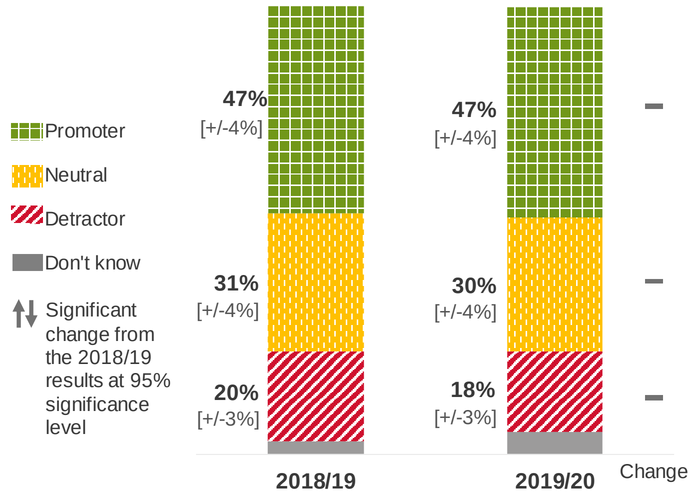
3.5.2. Service performance: Posts

The perceived performance of the service provided by Posts was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experience of Posts, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered this question on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS). Around half of businesses (47%) were 'Promoters' (scores of nine and ten), while 18% were 'Detractors' (scores of zero to six) and 30% were neutral (scores of seven and eight). Chart 3.5.2 provides details. Overall, Posts had an NPS score of +30. These figures remain unchanged since 2018/19.

Chart 3.5.2 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 in 2018/19 (748), all respondents who used Posts in 2019/20 (765)

Businesses that sold both goods and services overseas were more likely to be 'Promoters' of Posts (61%), compared with businesses that only sold goods (46%) or services (45%). Otherwise, the likelihood of recommending the service was consistent across different types of business.

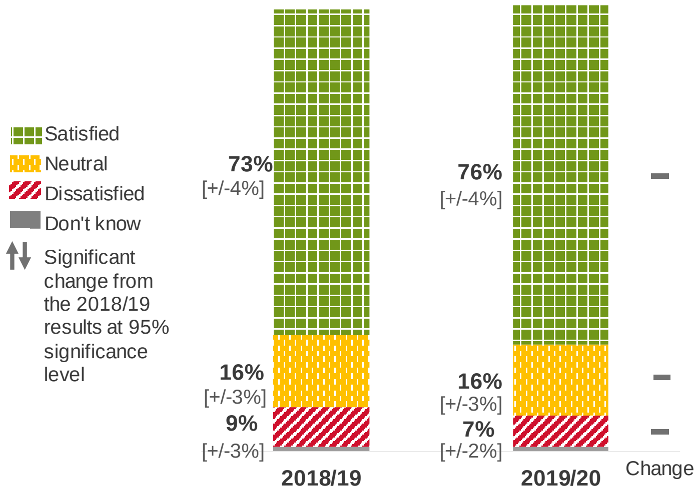
Businesses were asked about ways they thought Posts **could be improved.** Businesses raised a range of issues, including information (17%), for example more specific or tailored information (8%); staff (16%), including requests for more knowledgeable staff and a better understanding of their market or the current climate; communication (12%), including more feedback or follow-up (8%); and more or specialist support (10%).

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[21].

Three in four businesses (76%) that used the service were satisfied with their overall experience (rating it of seven out of ten or higher), including 21% of businesses that were very satisfied (giving a rating of ten out of ten). Around one in six (16%) businesses were neither satisfied nor dissatisfied (giving a rating of between four and six). Seven per cent were dissatisfied with their overall experience (giving a rating of three or lower). There have been no significant changes since 2018/19.

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

Chart 3.5.3 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, except those giving a 'not applicable' answer in 2018/19 (725) and in 2019/20 (725)

Satisfaction with the service was consistent across different types of business.

Perceptions of advice and support

This section shows how businesses rated the advice and support they received from Posts.

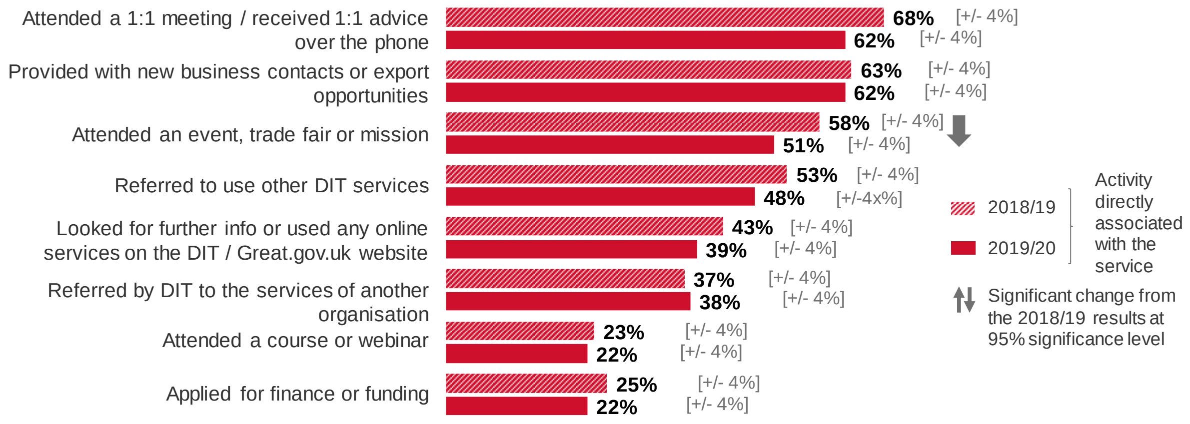
All respondents were asked **what happened when the organisation used the service** (Chart 3.5.4). The chart shows the various activities, all of which are relevant to Posts[22].

Businesses were most likely to have attended a one-to-one meeting or received one-to-one advice over the phone (62%) and to have been provided with new business contacts or export opportunities (62%). Around half attended an event, trade fair or mission (51%) or were referred to other DIT services (48%), while more than a third looked for further information or used online services on the DIT or Great.gov.uk website (39%) or were referred to the services of another organisation (38%). One in five attended a course or webinar (22%) or applied for finance or funding (22%).

Since 2018/19, there was a decrease in the proportion of businesses who attended an event, trade fair or mission (from 58% to 51%).

[22] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.5.4 Specific activities experienced when using Posts



Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used Posts (2018/19: 748, 2019/20: 765)

Small and medium-sized businesses were more likely than large businesses to have applied for finance or funding (24% compared with 7%), and online exporters were also more likely to have done this (30% compared with 20% of businesses that did not export online). New or potential exporters were more likely than established exporters to have attended an event, trade fair or mission (65% compared with 48%).

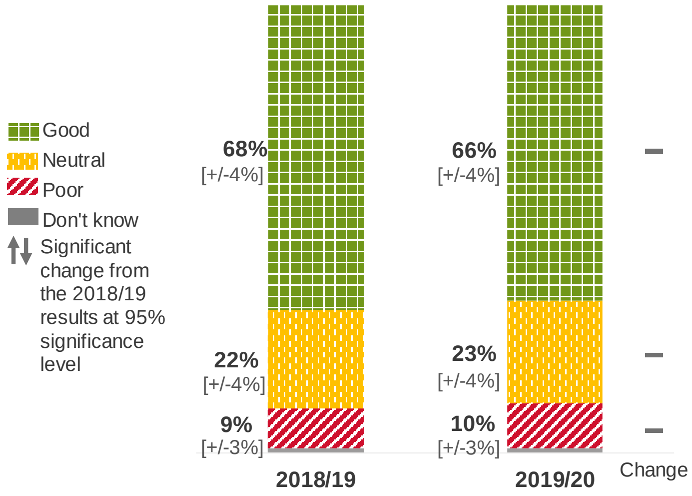
When asked which **specific types of support** they received as part of Posts, three in ten said they received an off-the-shelf overview for existing markets and sectors (29%), or received tailored ‘route to market’ information (27%). Two in ten (21%) received market information about competition specific to their products or services, while 15% received an analysis of suppliers, and the same proportion (15%) received advocacy, lobbying or support for a bid. There were no significant changes since 2018/19.

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.5.5, two-thirds (66%) rated Posts as good at meeting their needs (a score of seven or more out of ten). One in ten (10%) rated the service negatively when asked how it met their needs (a score of three or below), while 23% were neutral (a score between four and six).

There were no noticeable differences by business type, and there were no significant changes since 2018/19.

Chart 3.5.5 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? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used an ITA, except those giving a 'not applicable' answer in 2018/19 (721) and in 2019/20 (724)

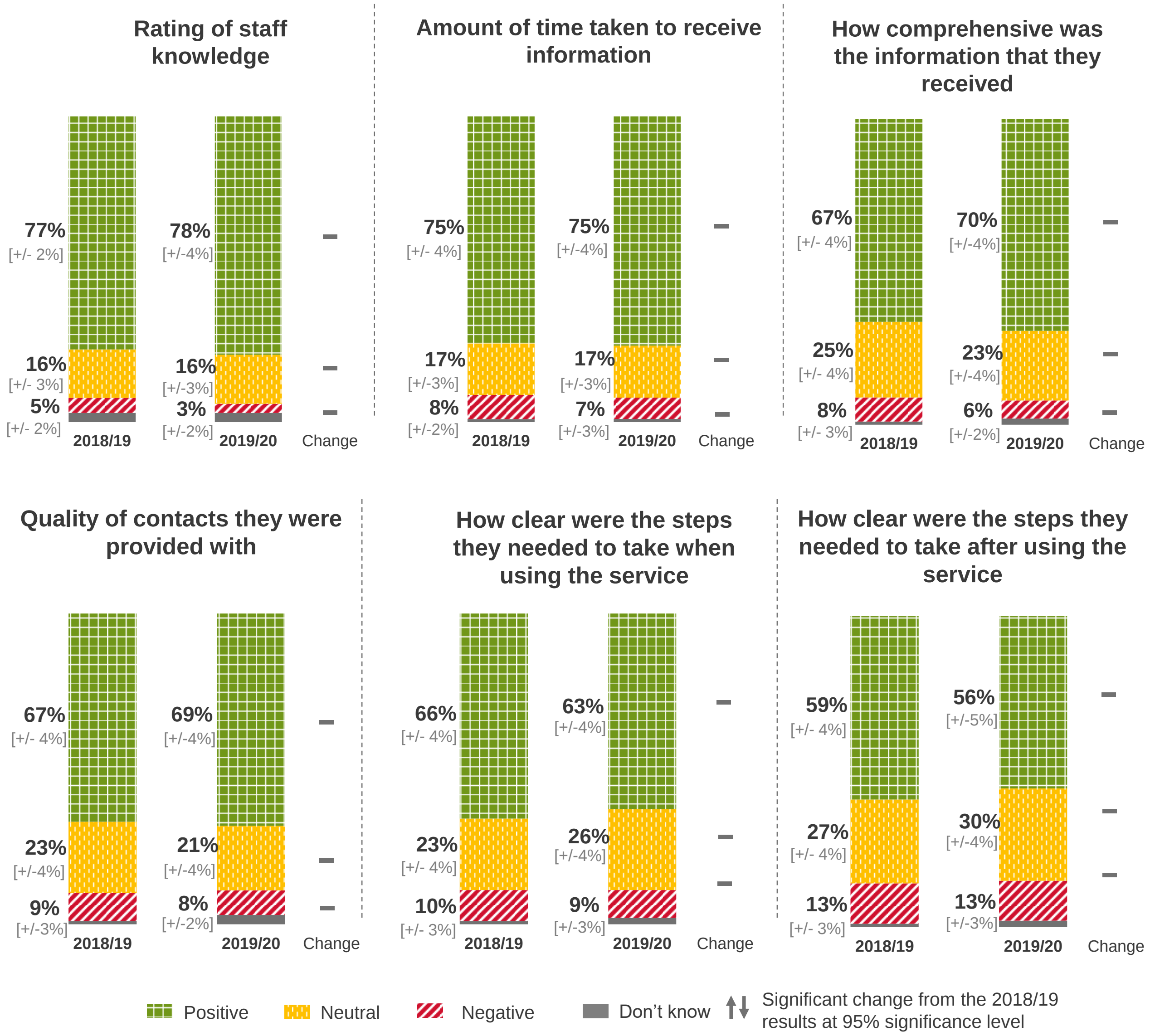
Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Chart 3.5.6 and Chart 3.5.7 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

Businesses were most likely to be satisfied with staff knowledge (78%), the amount of time taken to receive information (75%) and the external handover (74%). Seven in ten businesses gave a positive rating for how comprehensive the information they received from the service was (70%) and the quality of contacts they were provided with (69%).

Businesses were less likely to give positive ratings for the relevance of services they were referred to – either other DIT services (56%) or other organisations (57%).

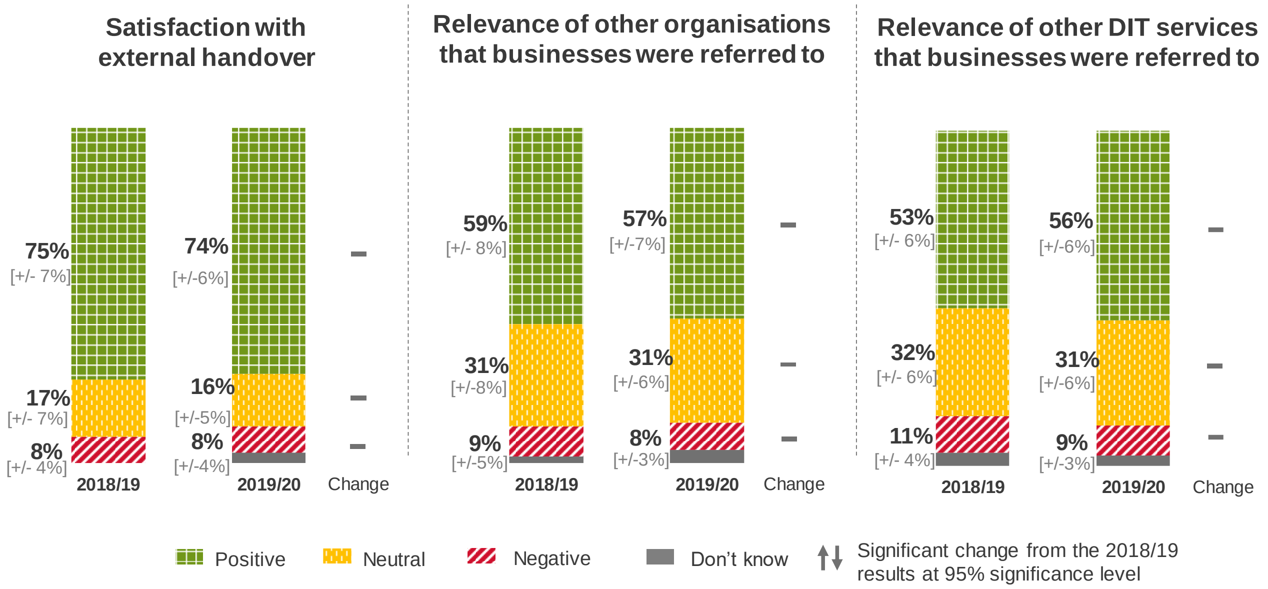
There were no noticeable differences by business type.

Chart 3.5.6 Rating by businesses 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? (2018/19: 695, 2019/20: 709). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 704, 2019/20: 705). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 692, 2019/20: 693).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 680, 2019/20: 689). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 666, 2019/20: 670). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 679, 2019/20: 673). Base: All businesses that used Posts, except those giving a 'not applicable' answer.

Chart 3.5.7 Rating by businesses of the handover and referrals they received – Posts

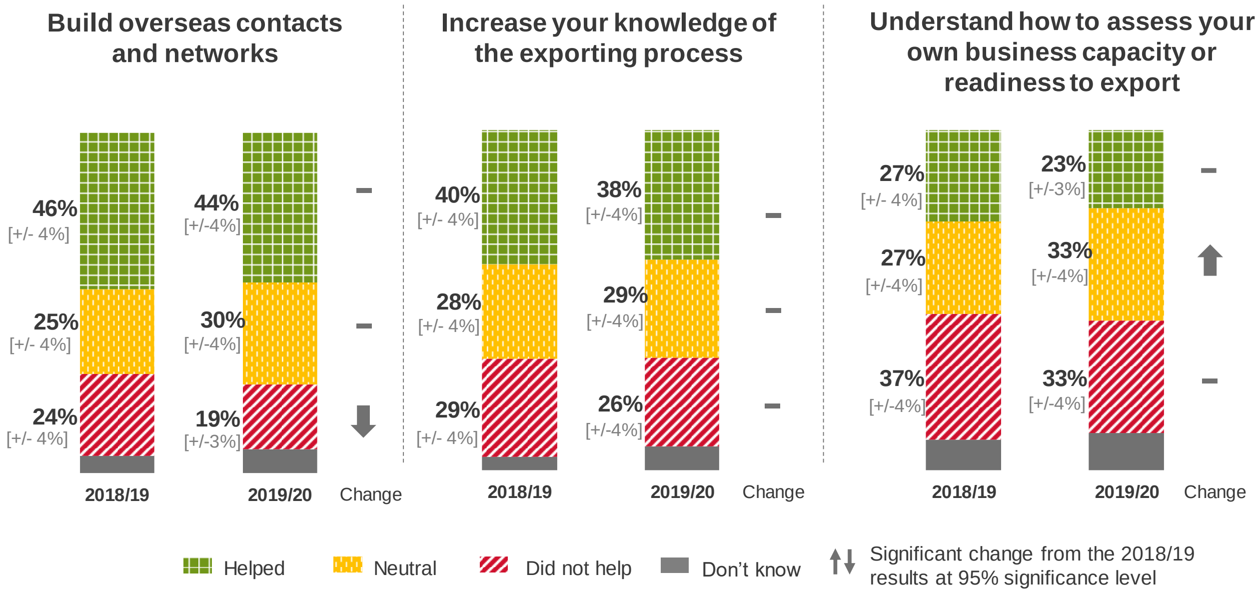


Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (2018/19: 266, 2019/20: 294).
Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (2018/19: 387, 2019/20: 365),
Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (2018/19: 266, 2019/20: 294) Base: All respondents that used Posts, except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from ten (helped a lot) to zero (did not help at all). The individual aspects of help and support were tailored to the Posts service; Chart 3.5.8 shows the items that were asked of businesses that used Posts. This shows that:

- More than four in ten businesses (44%) agreed that the service helped them to build overseas contacts and networks. Two in ten (19%) did not think the service helped in this way, lower than in 2018/19 (24%).
- Four in ten (38%) businesses agreed that the service helped the business to increase their knowledge of the exporting process, while 26% did not think it helped them in this way.
- A quarter (23%) of businesses agreed that the service helped the business to understand how to assess their own business capacity or readiness to export, while 33% did not think the service helped in this way. The proportion of businesses who were neutral increased from 2018/19 (from 27% to 33%).

Chart 3.5.8 Perceptions of help Posts provided



Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to …Base All respondents that used Posts in 2018/19 (748) and 2019/20 (765)

Looking at different types of businesses in 2019/20, businesses with a turnover of £500,000 or more were more likely than those with a turnover of less than £500,000 to say that the service helped them to build overseas contacts and networks (48% compared with 38%), and to increase their knowledge of the exporting process (45% compared with 30%).

Businesses that sold both goods and services overseas were more likely to say that the service helped them to understand how to assess their business capacity or readiness to export (32%), compared with those that only sold goods (19%) or services (22%). They were also more likely to say that the service helped them to increase their knowledge of the exporting process (57% compared with 37% and 33% respectively).

Online exporters were more likely to say that the service helped them to understand how to assess their business capacity or readiness to export (28% compared with 19% of those that did not export online).

Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with Posts.

Businesses carried out a **range of actions as a result of using Posts**. Chart 3.5.9 shows the actions that businesses may have taken[23]. Businesses were most likely to say they had identified new export opportunities or made new contacts (62%), assessed the company's readiness to export[24] (51% of non-exporters), researched the paperwork and regulations needed to export (40%) and started or increased exporting (32%). Around a quarter made investments to support

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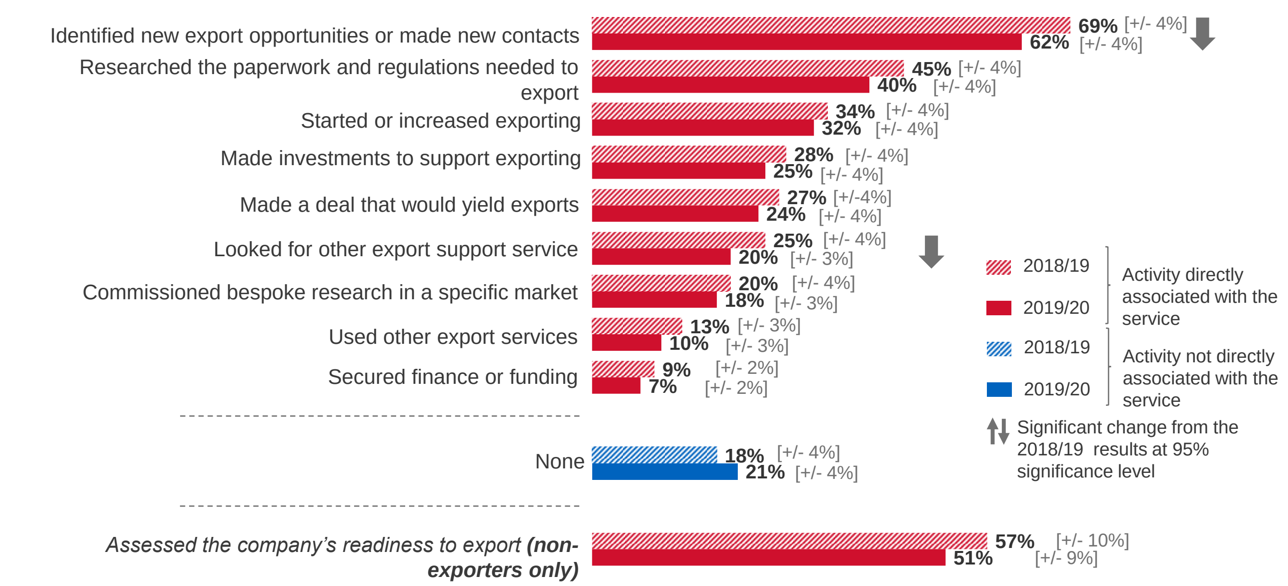
[23] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.
[24] This is only for businesses that were not exporting at the time of using the service.

exporting (25%) or made a deal that would yield exports (24%). Two in ten looked for other export support services (20%) or commissioned bespoke research in a specific market (18%). The full list of responses is shown in Chart 3.5.9.

Since 2018/19 there was a significant decrease in the proportion of businesses that had identified new export opportunities or made new contacts (62% down from 69%) and that had looked for other export support services (20% down from 25%).

Chart 3.5.9 Actions taken as a result of service interaction – Posts



Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 2% of respondents.
Base: All respondents who used Posts (2018/19: 748, 2019/20: 765). Non-exporters (2018/19: 157, 2019/20: 148)

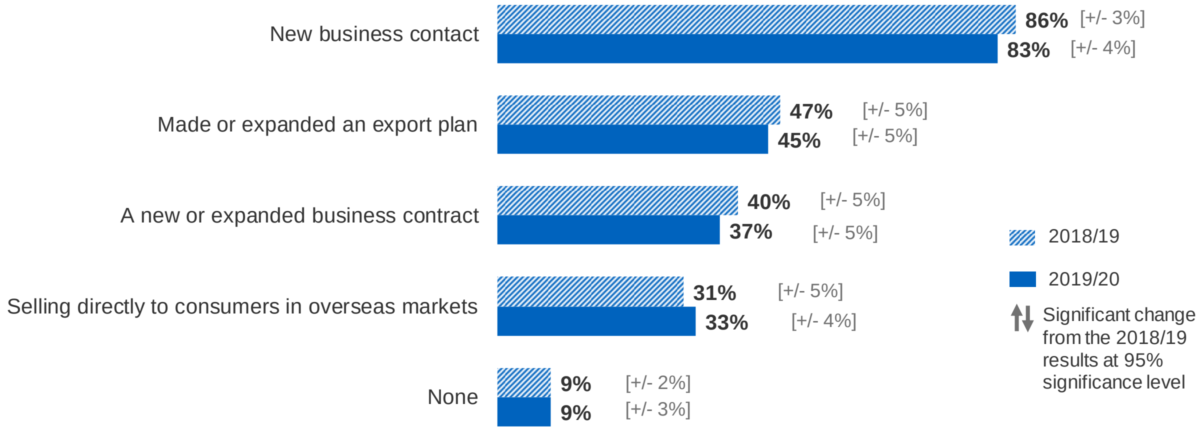
Small and medium-sized businesses were more likely than large businesses to have made investments to support exporting (27% compared with 9%), while micro businesses (with fewer than ten employees) were the most likely to have assessed their company's readiness to export (18%).

Businesses with a turnover of £500,000 or more were more likely to have started or increased exporting (38%) and to have used other export services (13%), compared with businesses with a turnover of less than £500,000 (26% and 6% respectively). Businesses that only sold services overseas were less likely to have researched the paperwork and regulations needed to export (28%) and to have used other export services (4%), compared with those that sold goods.

Businesses that reported having identified, or been provided with, new business contacts or export opportunities as part of the service from Posts were asked **what types of opportunities had been identified** (see Chart 3.5.10).

The majority (83%) of businesses identified new business contacts. Businesses also made or expanded their export plans (45%), developed a new or expanded business contract (37%) or sold directly to consumers in overseas markets (33%). There were no significant changes since 2018/19.

Chart 3.5.10 Opportunities identified as a result of service interaction – Posts



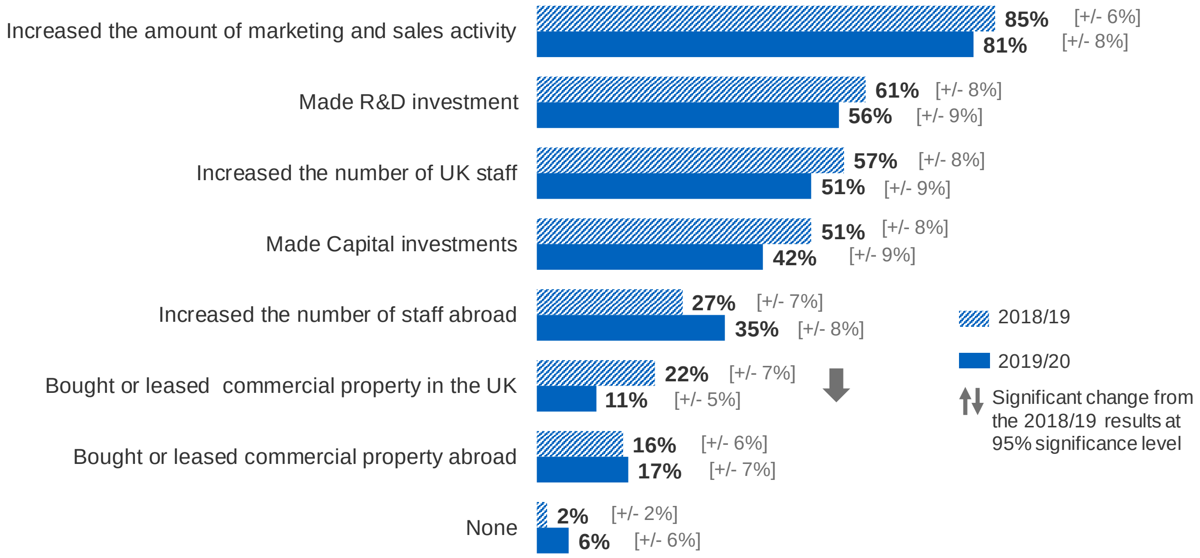
Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used Posts who had identified a new business contact as part of the DIT service (2018/19:571, 2019/20: 576)

Businesses that had identified a new business contact as part of the DIT service (478 respondents) were read a list of possible **types of contact** and asked which ones they had made. Businesses were most likely to say they had made contacts with buyers (49%) and distributors (41%), while a quarter (26%) had made contact with an agent. There were no significant changes since 2018/19.

If businesses reported they had made investments to support exporting as a result of using Posts (181 businesses), they were asked to specify the **type of investment** they had made. Eight in ten (81%) said they had increased their marketing and sales activity, while around half made a Research and Development investment (56%) or increased the number of UK staff (51%); see Chart 3.5.11.

There has been a decrease since 2018/19 in the proportion of businesses that have bought or leased commercial property in the UK (down from 22% to 11%).

Chart 3.5.11 Type of investments made as a result of DIT service – Posts



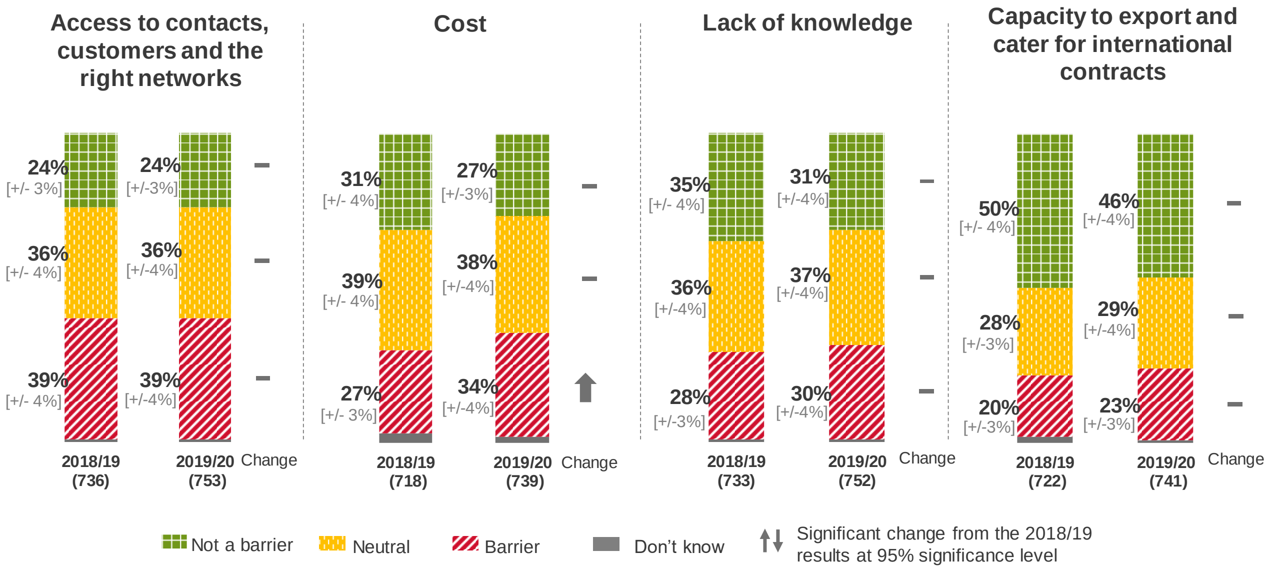
Qresult_invest - Which of the following investments has your business made to support new or increased export opportunities? IF NECESSARY: Please only think about investments relating to export activity. Table is restricted to answers given by more than 3% of respondents. Base: All respondents who had used Posts and had made investments to support exporting (2018/19: 209, 2019/20: 181)

Businesses with a turnover of £500,000 or more were more likely to have increased the number of UK staff (62%), compared with businesses with a turnover of less than £500,000 (20%).

Businesses were asked about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

Nearly four in ten (39%) businesses indicated that access to contacts, customers and the right networks was a barrier to exporting, including six per cent who thought this was a very strong barrier (a score of ten out of ten). One in three (34%) said that cost was a barrier, and this was a significant increase from 27% who said it was a barrier in 2018/19. Lack of knowledge was reported to be a barrier by 30% of businesses, while fewer businesses reported the capacity of their business to export and cater for international contacts as a barrier (23%).

Chart 3.5.12 Barriers to exporting – Posts



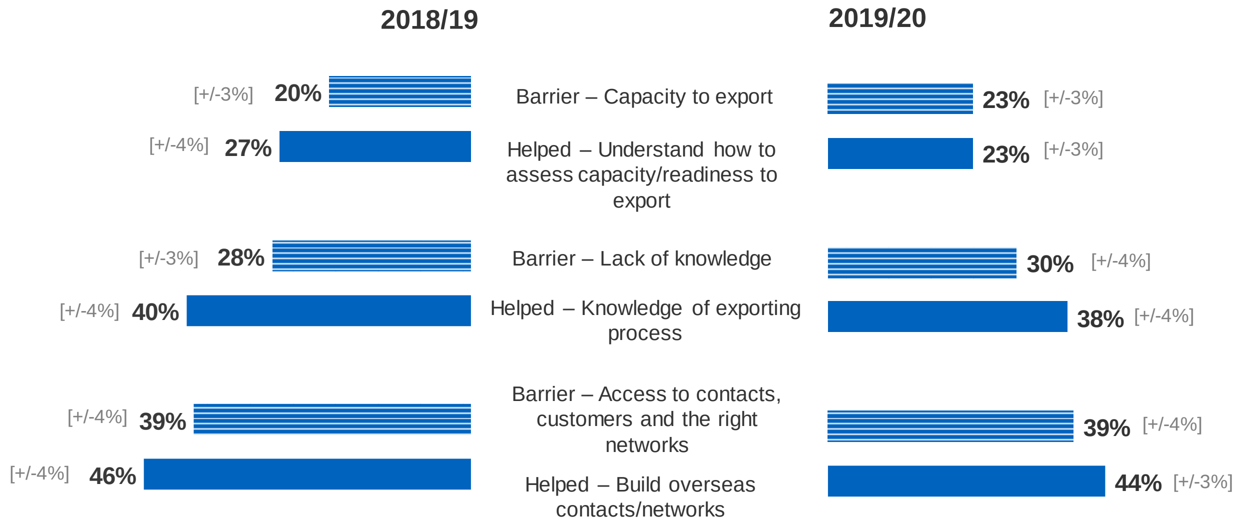
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Posts, except those giving a 'not applicable' answer

Businesses that exported online were more likely than business that did not export online to say that lack of knowledge was a barrier (36% compared with 25%).

Chart 3.5.13 compares responses to questions on the barriers to exporting listed above (specifically capacity to export, lack of knowledge and access to contacts) with business perceptions of how DIT helped them export (by understanding to assess capacity, increasing their knowledge of the exporting process and building overseas contacts and networks).

A quarter (23%) said that their capacity to export was a barrier, and the same proportion (23%) said Posts helped them understand how to assess their capacity and readiness to export. Three in ten businesses (30%) said lack of knowledge was a barrier to exporting, and a higher proportion (38%) said that Posts increased their knowledge of the exporting process. Four in ten (39%) said access to contacts, customers and the right networks was a barrier, and a slightly higher proportion (44%) said that the service helped them to build overseas contacts or networks.

Chart 3.5.13 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, except those giving a 'not applicable' answer: Capacity 2018/19: 722, 2019/20: 741, Lack of knowledge 2018/19: 733, 2019/20: 752, Access to contacts, customers and the right networks 2018/19: 736, 2019/20: 753.

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 Posts: 2018/19: 748, 2019/20: 765.

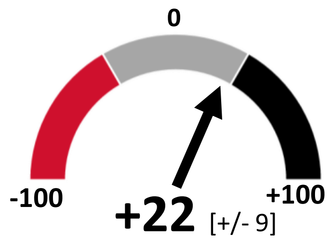
Summary page – Sector Teams

2018/19 result

2019/20 result

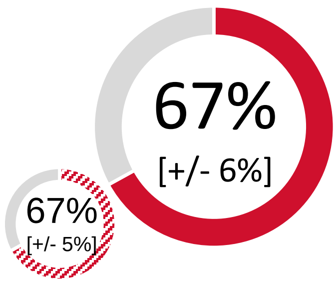
Significant change from the 2018/19 results at 95% significance level

Net Promoter Score

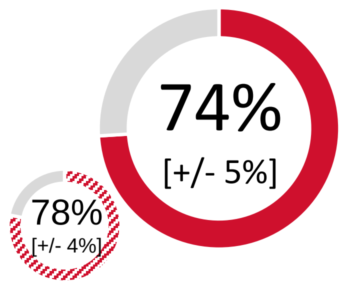


2018/19: **22** [+/- 7]

Overall service met needs

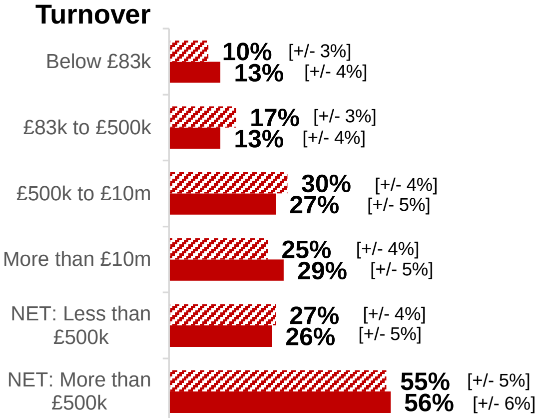


Satisfaction with service

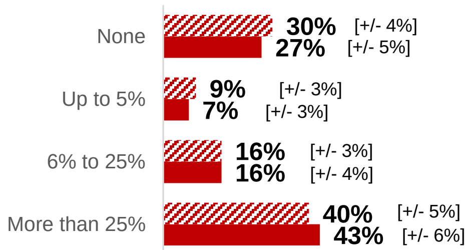


Turnover

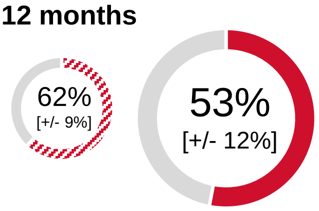
Turnover



% of turnover from exporting

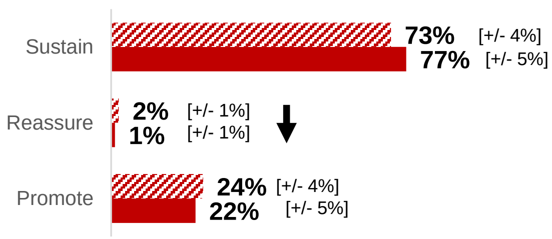


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

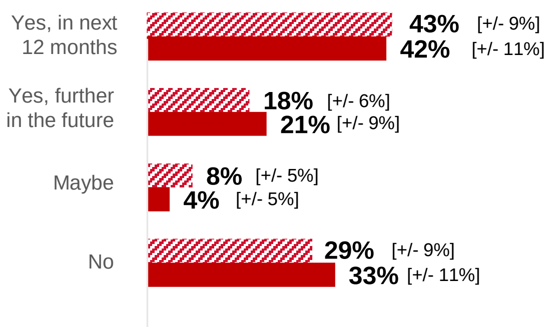


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.6. Sector Teams

DIT's Sector Teams work to maximise the supply of export ready UK companies. They work directly with industry and the international network to facilitate collaboration between UK businesses, co-ordinate government to government engagement, and support trade missions.

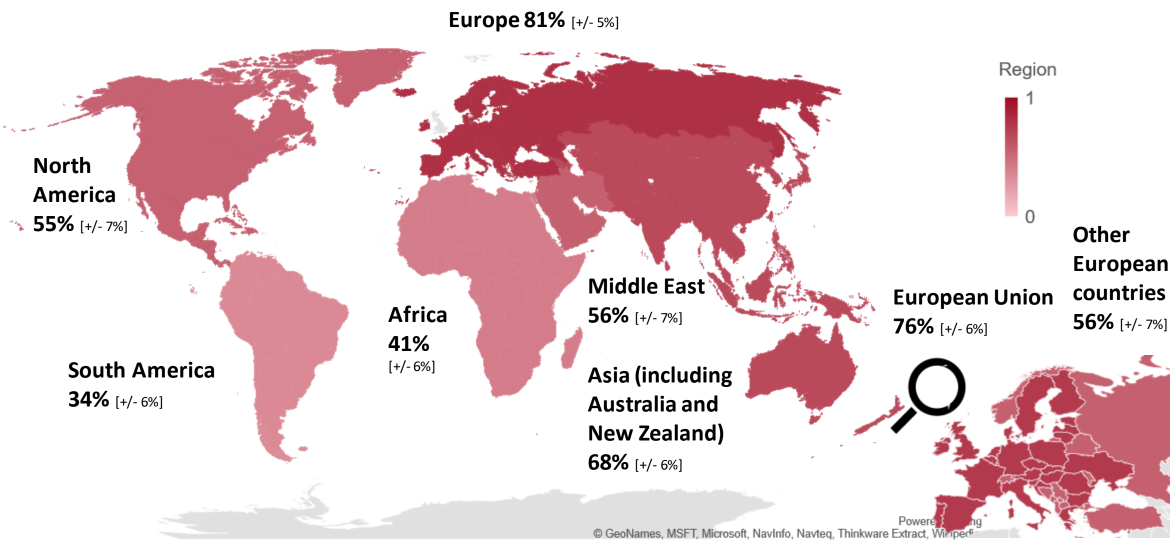
These findings are based on interviews with 308 businesses who used Sector Teams in April 2019 to March 2020[25]. Half (51%) sold goods overseas and over two-thirds (72%) sold services (28% only sold goods, 49% only sold services and 23% both).

Throughout this section the findings from businesses that used Sector Teams between April 2019 and March 2020 (2019/20) are compared with the 522 businesses interviewed after using Sector Teams in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported.

3.6.1. Sector Teams: Business export status

In total, 77% of businesses currently export by selling goods or services or have done previously. Of these, three-quarters (76%) sold within the European Union and just over half (56%) sold within the rest of Europe. Two-thirds sold goods or services in Asia (68%). Over half sold goods in the Middle East (56%) and North America (55%). Four in ten sold within Africa (41%) and one in three in South America (34%). There have been no significant changes since 2018/19.

Chart 3.6.1 Regions organisations exports to or exported to previously – Sector Teams



Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Sector Teams and who have exported (240)

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[25] 11 businesses that used Defence and Security Organisation services have been included in the Sector Teams service.

Table 3.6.1: Regions organisations exports to or exported to previously - Sector Teams

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Significant Change*
Europe	**81%**	4%	**81%**	5%	-
European Union	**78%**	4%	**76%**	6%	-
Other European countries	**53%**	5%	**56%**	7%	-
Asia (including Australia and New Zealand)	**69%**	5%	**68%**	6%	-
Middle East	**56%**	5%	**56%**	7%	-
North America	**60%**	5%	**55%**	7%	-
Africa	**39%**	5%	**41%**	6%	-
South America	**32%**	5%	**34%**	6%	-
Base	*403*		*240*		

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used the Sector Teams service and who have exported.
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

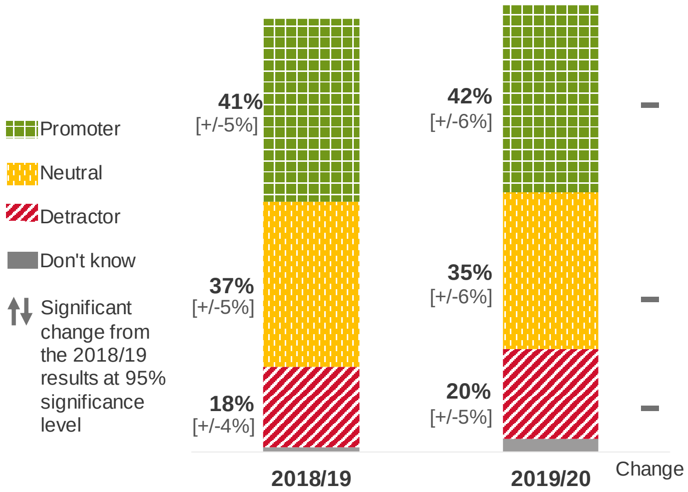
3.6.2. Service performance: Sector Teams

The perceived performance of the service provided by Sector Teams was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experiences of using Sector Teams, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS). Four in ten businesses (42%) were "Promoters" of Sector Teams (scores of nine and ten), while one in five (20%) were "Detractors" (scores of zero to six) and 35% were neutral (scores of seven and eight); Chart 3.6.2 provides details. Overall, Sector Teams had a positive NPS score of +22. These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

Chart 3.6.2 Likelihood of recommending service (NPS) – Sector 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 Sector Teams in 2018/19 (522), all respondents who used Sector Teams in 2019/20 (308)

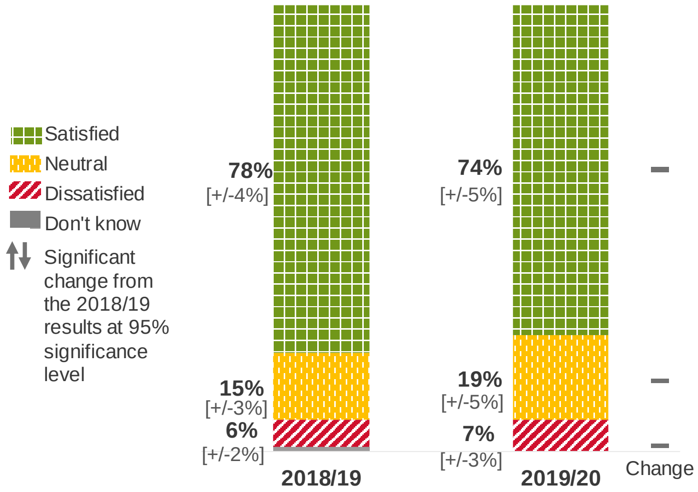
Businesses were asked about ways the service they used **could be improved**. Businesses were generally positive about how they thought the service could be improved with a quarter (27%) saying that nothing would improve it. The most commonly cited area for improvement was information (16%), with seven per cent citing more specific / tailored information. There were also comments relating to staff (14%), such as wanting more knowledgeable staff (7%). The same proportion raised issues of communication (14%), including seven per cent who suggested more feedback / follow up would improve the service. There were also comments about support (13%), such as requests for more / more specific support or advice.

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[26].

Three-quarters (74%) of businesses that used the service were satisfied with their overall experience (rating it of seven out of ten or higher), including 18% of businesses that were very satisfied (giving a rating of ten out of ten). One in five (19%) businesses were neither satisfied nor dissatisfied (giving a rating of between four and six). Seven per cent of businesses were dissatisfied with their overall experience (giving a rating of three or lower). These figures remain unchanged since 2018/19.

[26] Here and throughout the report, businesses who gave an answer of ‘not applicable’ have been excluded from the analysis.

Chart 3.6.3 Satisfaction with service - Sector 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 Sector Teams, except those giving a 'not applicable' answer in 2018/19 (500) and in 2019/20 (292)

Satisfaction with the service varied by business size, with micro businesses (with between zero and nine employees) the least likely to be satisfied (64%). Businesses with a turnover of £500,000 or more were more likely to be satisfied than businesses with a turnover of under £500,000 (77% compared with 60%). In addition, businesses that only sold goods overseas were less likely to be satisfied (65%) than those that sold services (81%) or both goods and services (79%).

Perceptions of advice and support

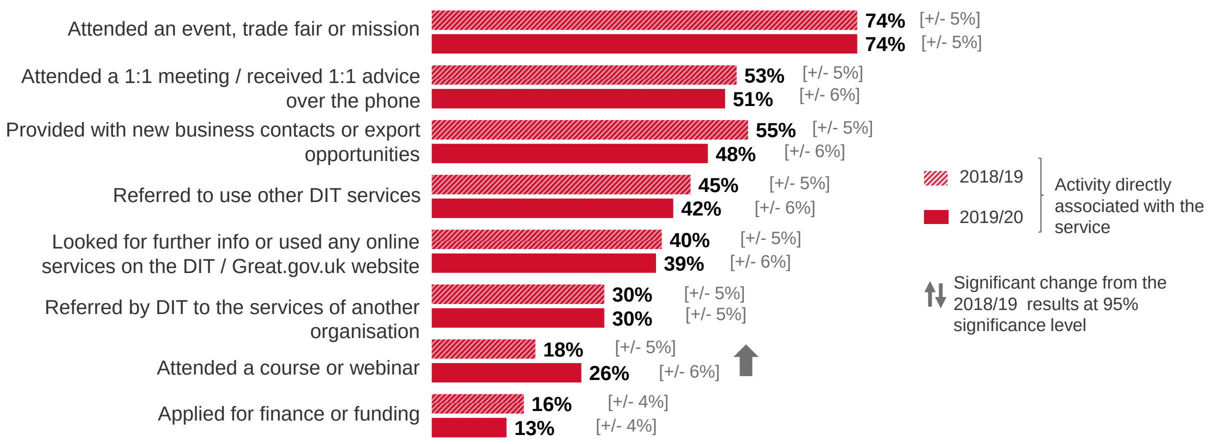
This section shows how businesses rated the advice and support they received from Sector Teams.

All respondents were asked **what happened when the organisation used the service** (Chart 3.6.4). The chart shows the various activities, all of which are relevant to Sector Teams[27].

Three in four businesses (74%) attended an event or trade fair or mission as a result of using the service, while around half attended a one-to-one meeting or received one-to-one advice over the phone as a result of using the service (51%) or were provided with new business contacts or export opportunities (48%). Around four in ten were referred to use other DIT services (42%) or looked for further information or used online services on the DIT or Great.gov.uk website (39%), while three in ten (30%) were referred by DIT to the services of another organisation. One in four (26%) attended a course or webinar, an increase from 18% in 2018/19. One in eight (13%) applied for finance or funding.

[27] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.6.4 Specific activities experienced when using Sector Teams



Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used Sector Teams (2018/19: 522, 2019/20: 308)

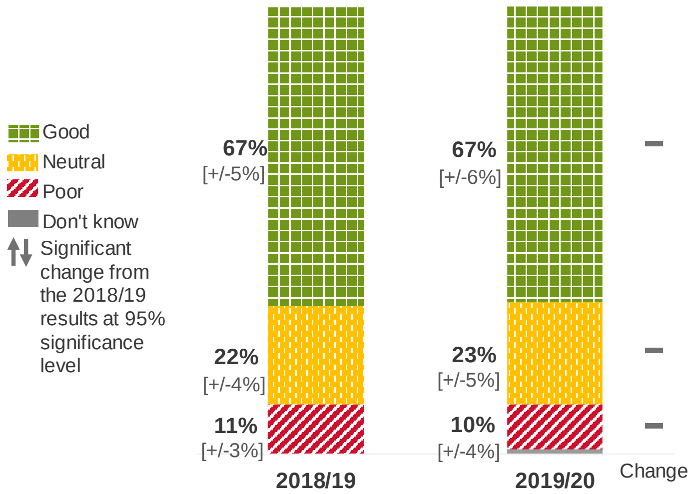
Medium-sized businesses (with 50-249 employees) were most likely to have been referred to other DIT services (64%), while businesses that exported online were less likely to have attended a course or webinar (14% compared with 31% of those that did not export online).

When asked which **specific types of support** they received as part of Sector Teams, 23% said they received an off-the-shelf overview for existing markets and sectors, while 20% received tailored 'route to market' information, an increase from 12% in 2018/19. In addition, 15% received market information about competition specific to their products or services, and the same proportion (15%) received advocacy, lobbying, or support for a bid.

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.6.5, two in three (67%) businesses rated Sector Teams as good at meeting their needs (a score of seven or more out of ten). One in ten (10%) businesses rated the service negatively when asked how it met their needs (a score of 3 or below), while 23% were neutral (a score between four and six). These figures remain unchanged since 2018/19.

Chart 3.6.5 Rating of whether overall service met needs – Sector Teams



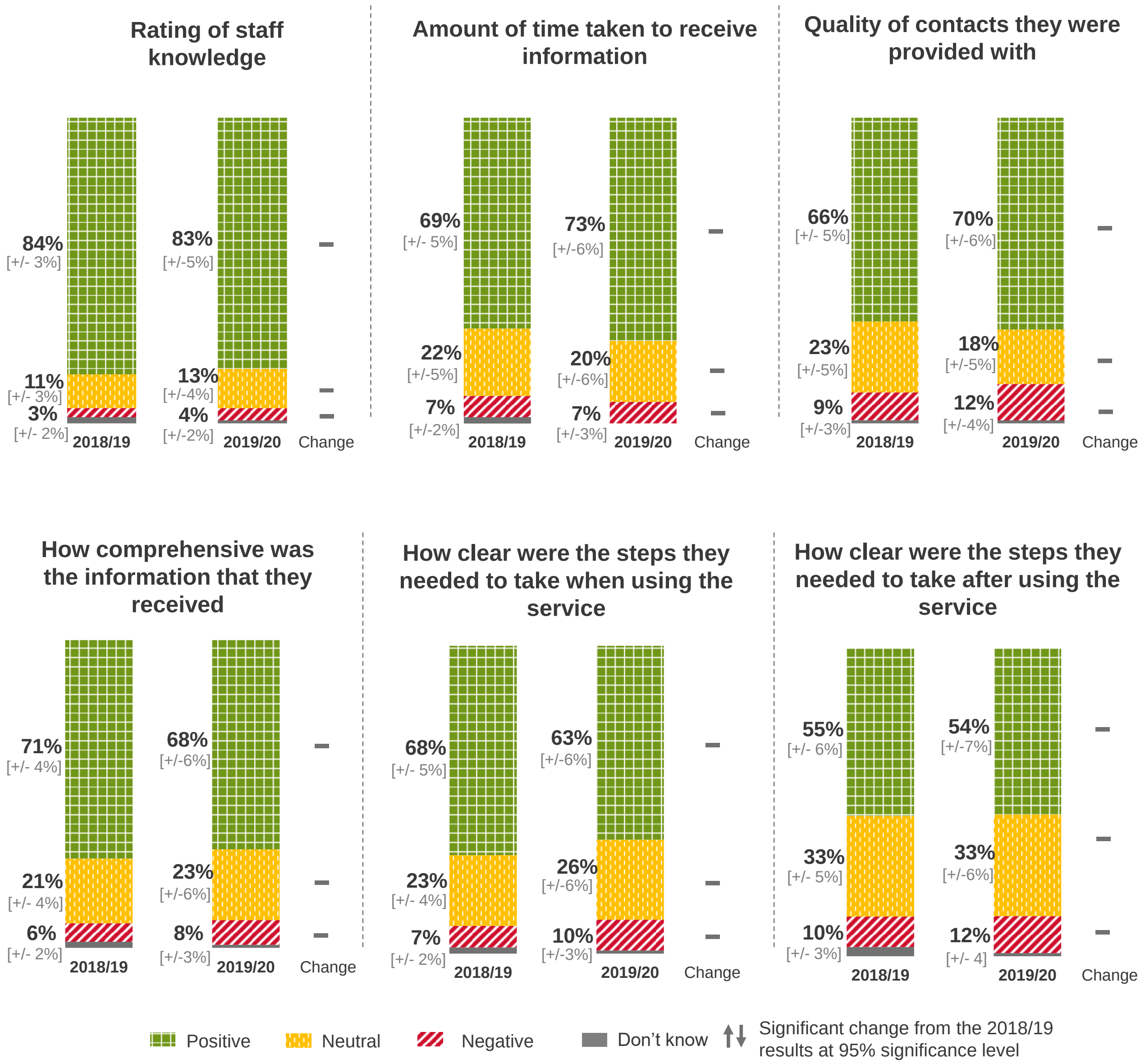
Qqualinfo - Using that same scale, how would you rate... The extent to which the overall service received met your needs? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used Sector Teams, except those giving a 'not applicable' answer in 2018/19 (490) and in 2019/20 (282)

Analysis by business type shows that large businesses were more likely to give a positive rating than medium or small businesses (82% compared with 64%), while businesses that were new to exporting were more likely than established exporters to give a negative rating (19% compared with 8%).

Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Charts 3.6.6 to 3.6.8 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

Businesses were most likely to be satisfied with how straightforward the registration process was (88%), the organisation of the service (87%) and the knowledge of the staff (83%). Around seven in ten businesses were satisfied with the amount of time taken to receive information (73%), the quality of contacts they were provided with (70%) and how comprehensive the information they received from the service was (68%).

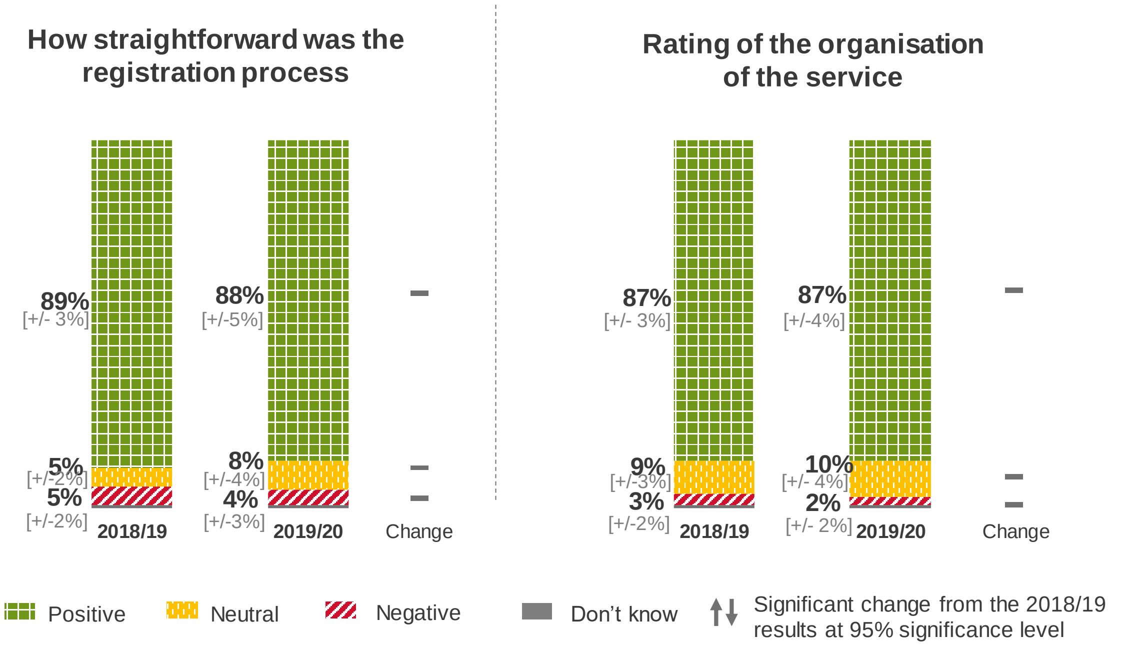
Chart 3.6.6 Rating by businesses of the specific advice and support they received – Sector Teams



Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (2018/19: 499, 2019/20: 288). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 450, 2019/20: 249). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 496, 2019/20: 280).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 469, 2019/20: 268). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 447, 2019/20: 269). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 454, 2019/20: 256). Base: All businesses that used Sector Teams, except those giving a 'not applicable' answer.

Businesses with a turnover of £500,000 or more were more likely than businesses with a turnover of under £500,000 to give a positive rating for how clear the steps were that were needed after using the service (60% compared with 42%).

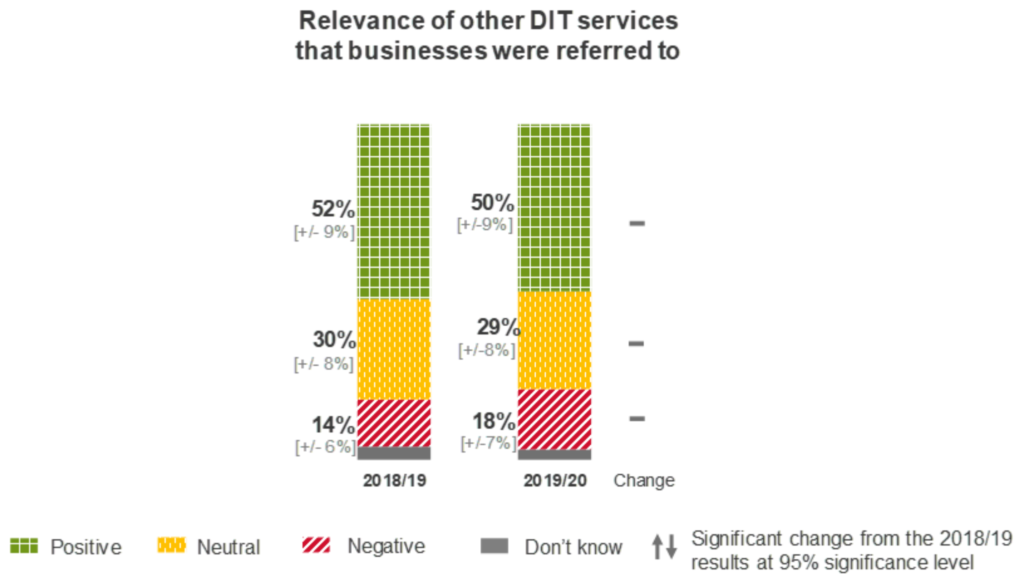
Chart 3.6.7 Rating by businesses of the organisation of the service and registration process – Sector Teams



Qevent - How would you rate the organisation of the [SAMPLED SERVICE]? (2018/19: 478, 2019/20: 283).
Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (2018/19: 464, 2019/20: 274),
Base: All respondents that used Sector Teams, except those giving a 'not applicable' answer

Among businesses that were referred to another organisation, only half were positive about the relevance of other DIT services that they were referred to (50%). There were no changes since 2018/19, and no differences between business types.

Chart 3.6.8 Rating by businesses of the referrals they received - Sector Teams

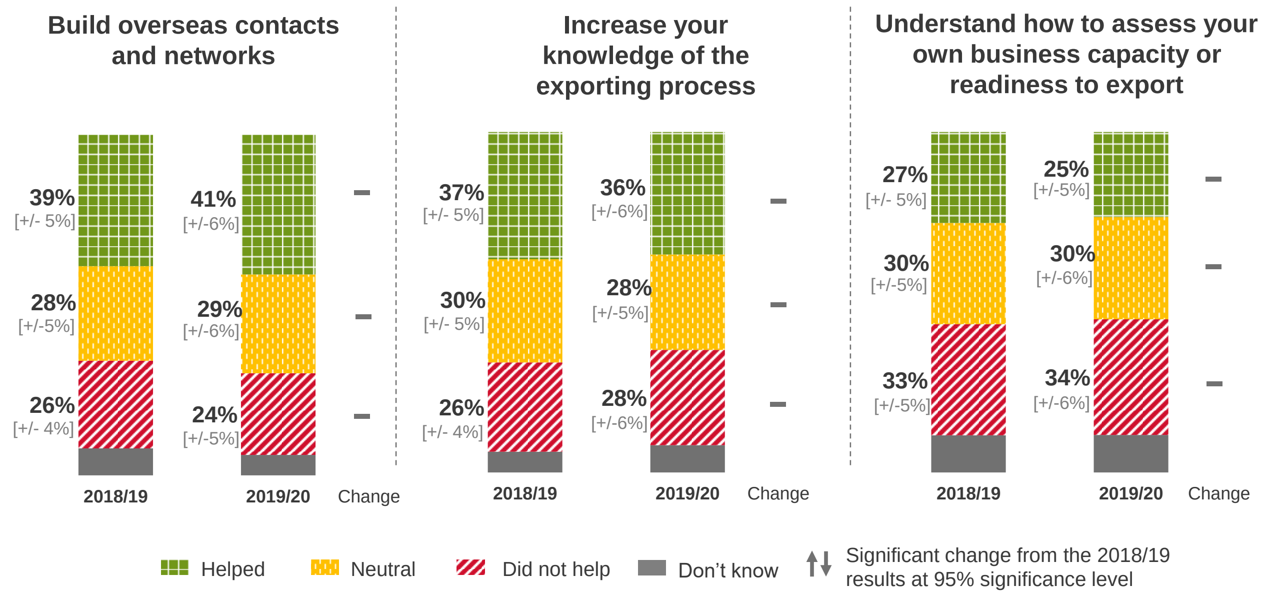


Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (2018/19: 219, 2019/20: 130),

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from ten (helped a lot) to zero (did not help at all). The individual aspects of help and support were tailored to the different services in the survey, and Chart 3.6.9 shows the items that were asked of businesses that used Sector Teams. This shows that:

- Four in ten (41%) businesses agreed that the service helped them to build overseas contacts and networks, while one in four (24%) did not think the service helped in this way.
- Around one in three (36%) businesses agreed that the service helped the business to increase their knowledge of the exporting process, while 28% did not think it helped them in this way.
- A quarter (25%) of businesses agreed that the service helped the business to understand how to assess their own business capacity or readiness to export, while a third (34%) did not think the service helped in this way.

Chart 3.6.9 Perceptions of help Sector Teams provided



Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to …Base All respondents that used Sector Teams in 2018/19 (522) and 2019/20 (308)

Businesses that only sold goods overseas were more likely to say that the service did not help them to build overseas contacts and networks (37%), compared with businesses that only sold services (21%) or that sold both goods and services (16%).

Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with Sector Teams.

Businesses carried out a **range of actions as a result of using Sector Teams**. Chart 3.6.10 shows the actions that businesses may have taken[28].

Businesses were most likely to say they identified new export opportunities or made new contacts (62%). A third of businesses had researched the paperwork and regulations needed to export (35%), while around a quarter had made investments to support exporting (28%) or started or increased exporting (26%). Around one in five said they had looked for other export services (22%) or made a deal that would yield exports (21%). One in three (33%) businesses that were not

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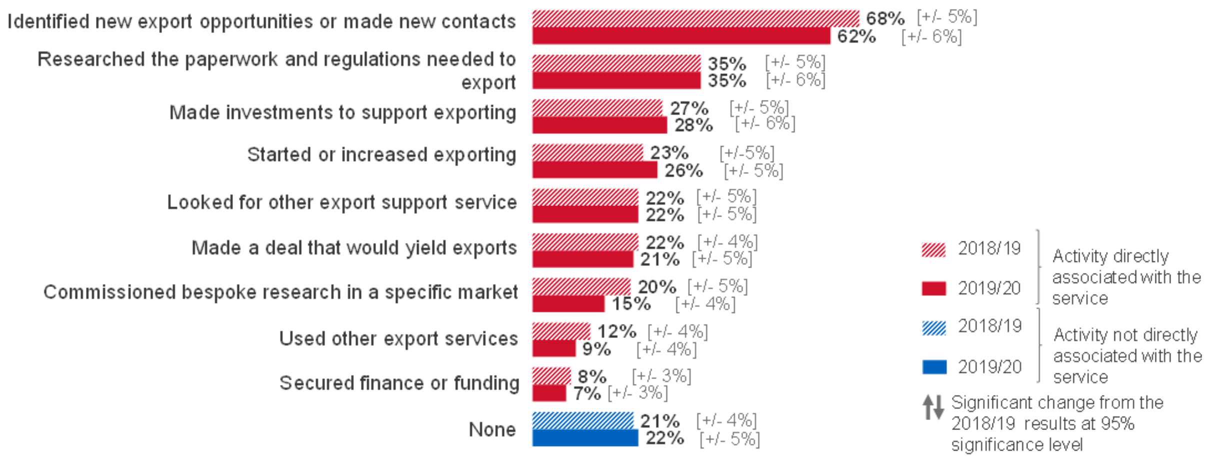
[28] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

exporting at the time of using the service had assessed the company's readiness to export; this figure should be treated with caution due to the small base size.

There have been no significant changes since 2018/19.

Chart 3.6.10 Actions taken as a result of service interaction - Sector Teams



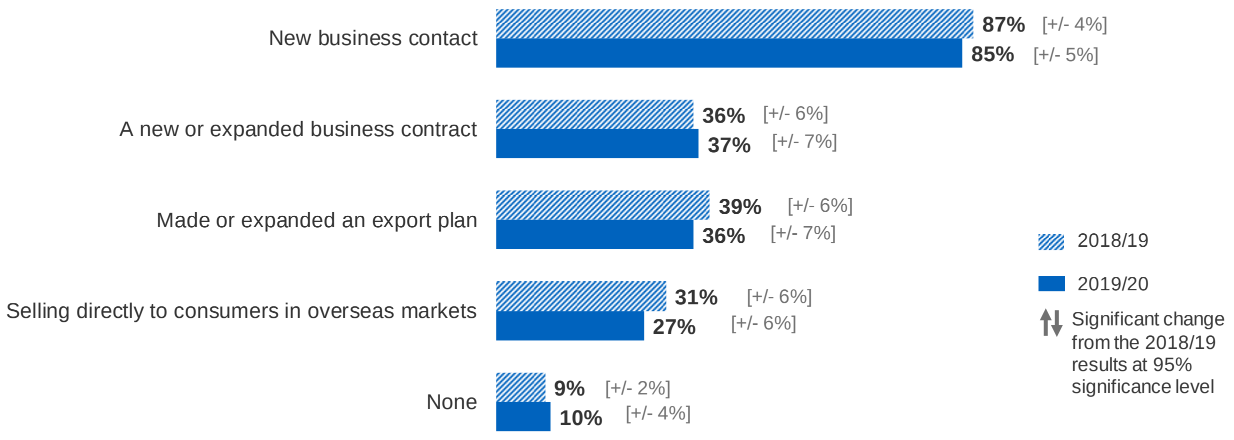
Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 2% of respondents.
Base: All respondents who used Sector Teams (2018/19: 522, 2019/20: 308).

Large businesses were more likely than small and medium-sized businesses to have used other export services (19% compared with 6%).

Businesses that reported having identified, or been provided with, new business contacts or export opportunities as part of the service from Sector Teams (215 respondents) were asked **what types of opportunities had been identified** (see Chart 3.6.11).

Respondents were most likely to say that they had identified new business contacts (85%), while the other main opportunities were making a new or expanded business contract (37%), making or expanding an export plan (36%) and selling directly to consumers in overseas markets (27%). These figures have not changed since 2018/19.

Chart 3.6.11 Opportunities identified as a result of service interaction – Sector Teams



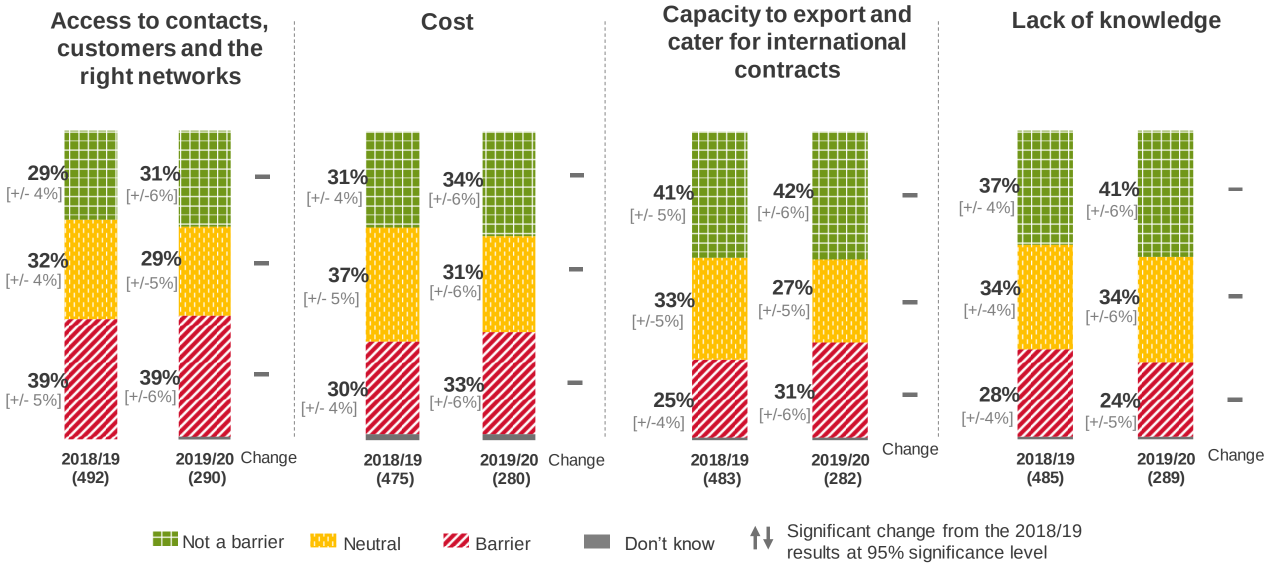
Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used Sector Teams who had identified a new business contact as part of the DIT service (2018/19:386, 2019/20: 215)

Businesses that had identified a new business contact as part of the Sector Teams service (180 respondents) were read a list of possible **types of contact** and asked which ones they had made. Businesses were most likely to say that they had made contact with a buyer (40%), although this has decreased since 2018/19 (51%). One in three (33%) said they had contacted a distributor (33%), and 22% an agent.

Businesses were asked about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

Four in ten businesses indicated that access to contacts, customers and the right networks was a barrier to exporting (39% gave a score of seven or more out of ten). Cost was said to be a barrier by one in three businesses (33%), while 31% said that their capacity to export and cater for international contracts was a barrier, and 24% said lack of knowledge was a barrier; see Chart 3.6.12. There were no changes since 2018/19.

Chart 3.6.12 Barriers to exporting – Sector Teams



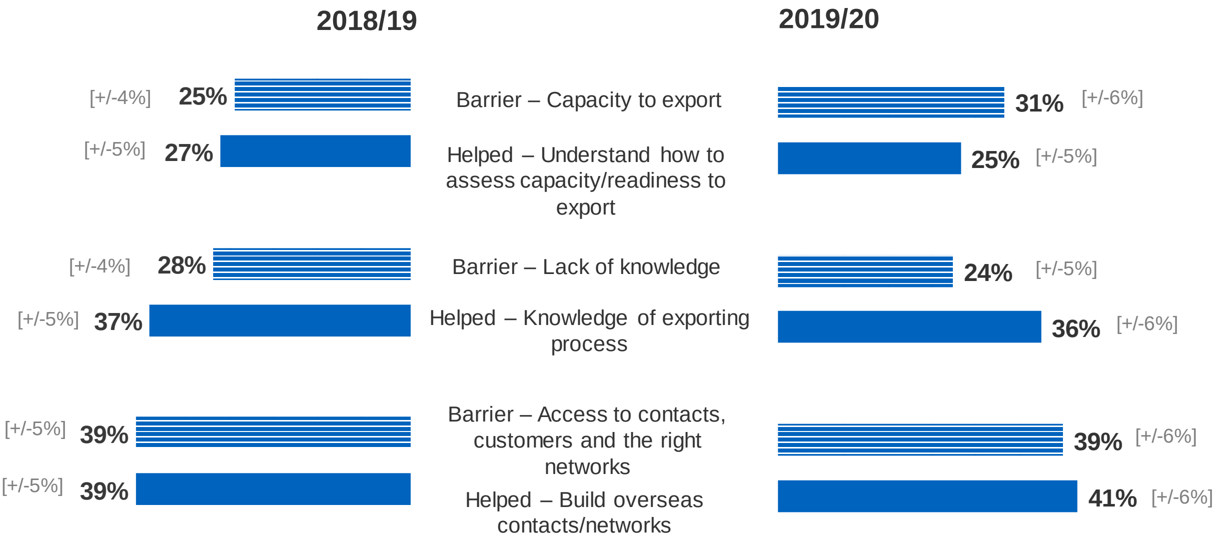
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Sector Teams, except those giving a 'not applicable' answer

Medium-sized businesses were most likely to say that cost was a barrier (50%). Businesses that had a turnover of less than £500,000 were more likely to say that lack of knowledge was a barrier to exporting, compared with businesses with a turnover of £500,000 or more (34% compared with 20%). Businesses that sold both goods and services overseas were more likely to say that lack of knowledge was a barrier (37% compared with 18% of those that only sold goods and 17% that only sold services).

Chart 3.6.13 compares responses to questions on the barriers to exporting listed above (specifically capacity to export, access to contacts and lack of knowledge) with business perceptions of how DIT helped them export (by helping them understand how to access their capacity to export, increasing their knowledge of the exporting process and building overseas contacts and networks).

Four in ten businesses (39%) said that a lack of access to contacts, customers, and the right networks was a barrier to exporting, while a similar proportion (41%) said that Sector Teams helped them build contacts and networks. A quarter (24%) of businesses said that lack of knowledge was a barrier to exporting, while 36% said that DIT helped them increase their knowledge of the exporting process. Three in ten businesses (31%) stated that a lack of capacity to export and cater for international contracts was a barrier to exporting, while a slightly smaller proportion (25%) said that Sector Teams helped them understand how to assess their business capacity or readiness to export.

Chart 3.6.13 Barriers to exporting and how DIT helped – Sector 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 Sector Teams, except those giving a 'not applicable' answer: Capacity 2018/19: 483, 2019/20: 282, Lack of knowledge 2018/19: 485, 2019/20: 289, Access to contacts, customers and the right networks 2018/19: 492, 2019/20: 290.

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 Sector Teams: 2018/19: 498, 2019/20: 297.

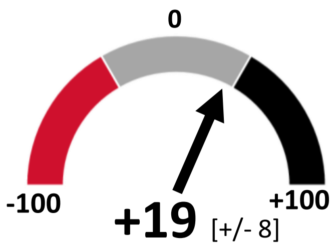
Summary page – Webinars

2018/19 result

2019/20 result

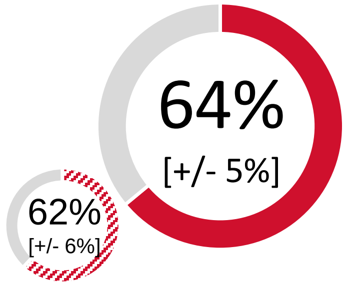
Significant change from the 2018/19 results at 95% significance level

Net Promoter Score

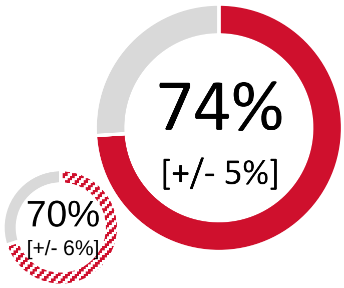


2018/19: **19** [+/- 10]

Overall service met needs

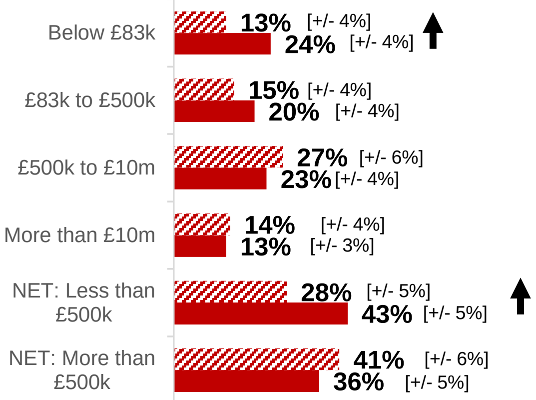


Satisfaction with service

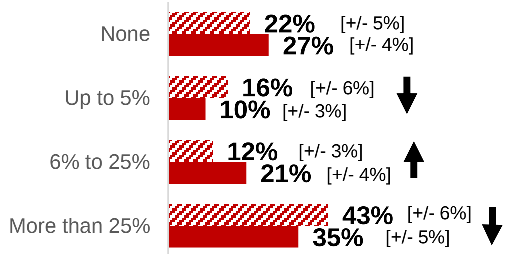


Turnover

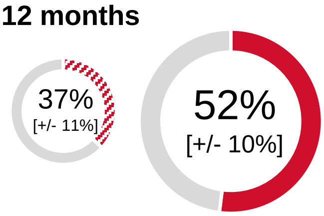
Turnover



% of turnover from exporting

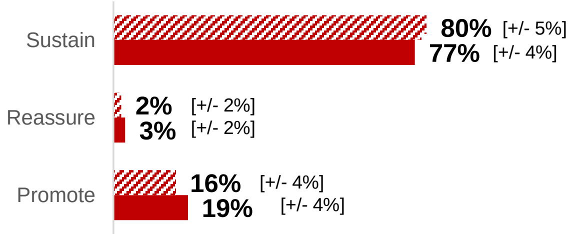


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

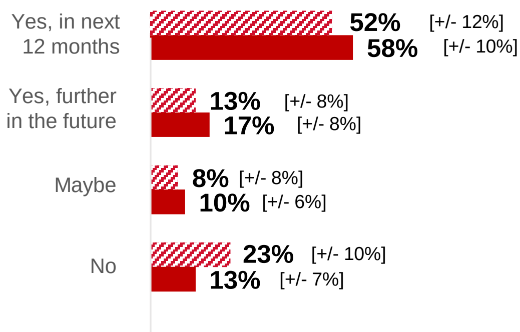


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.7. Webinars

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

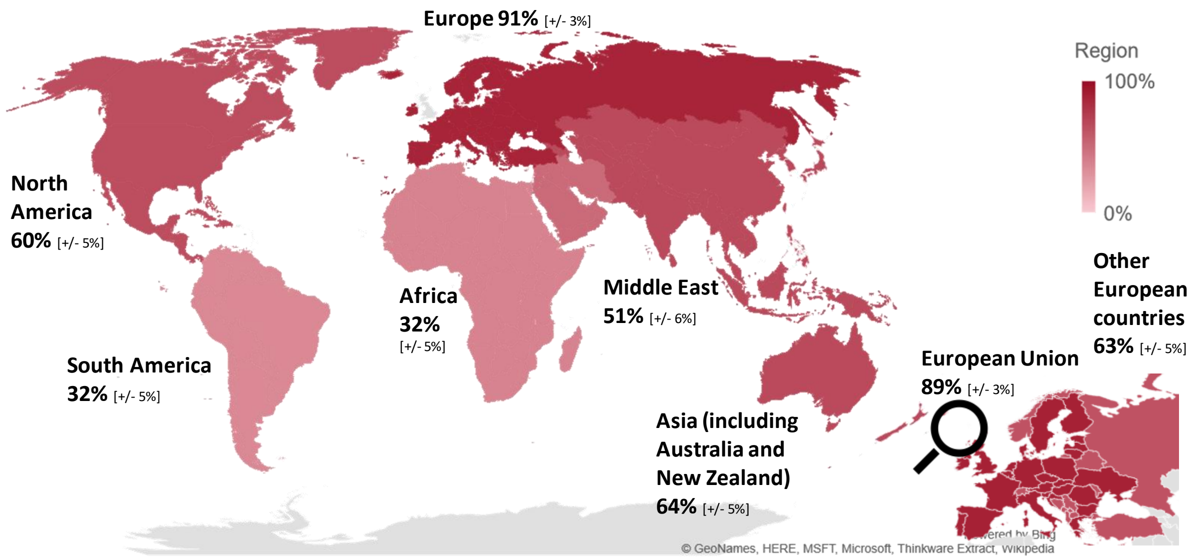
These findings are based on interviews with 423 businesses who used Webinars in April 2019 to March 2020. Around eight in ten (79%) sold goods overseas and one in three (33%) sold services (67% only sold goods, 21% only sold services and 12% both).

Throughout this section the findings from businesses that used Webinars between April 2019 and March 2020 (2019/20) are compared with the 333 businesses interviewed after using Webinars in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported.

3.7.1. Webinars: Business export status

In total, 77% of businesses currently export by selling goods or services or have done so previously. Of these, nine in ten (89%) sold within the European Union and six in ten (63%) sold within the rest of Europe. Around six in ten sold in Asia (64%) or North America (60%) and half (51%) sold in the Middle East. One in three sold in Africa (32%) or South America (32%). There have been no significant changes since 2018/19.

Chart 3.7.1 Regions organisations exports 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 (343)

Table 3.7.1: Regions organisations exports to or exported to previously - Webinars

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Significant Change*
Europe	**87%**	4%	**91%**	3%	-
European Union	**84%**	5%	**89%**	3%	-
Other European countries	**63%**	6%	**63%**	5%	-
Asia (including Australia and New Zealand)	**67%**	6%	**64%**	5%	-
North America	**65%**	6%	**60%**	5%	-
Middle East	**50%**	7%	**51%**	6%	-
Africa	**37%**	7%	**32%**	5%	-
South America	**34%**	7%	**32%**	5%	-
Base	*273*		*343*		

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used the Webinars service and who have exported.
* Charts and tables represent a statistically significant increase from 2018/19 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

3.7.2. Service performance: Webinars

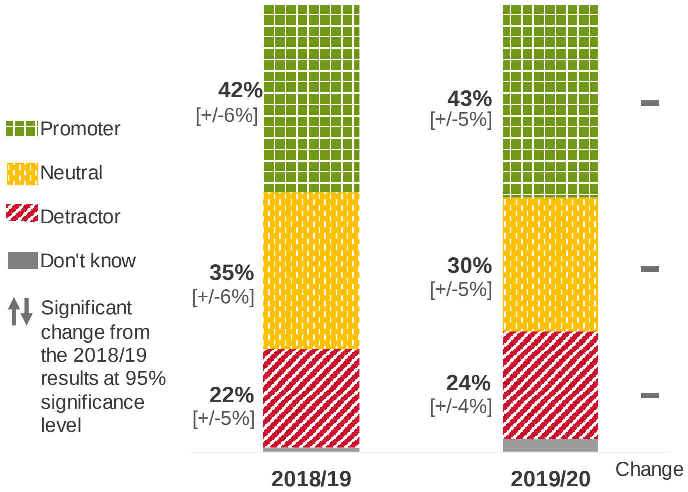
The perceived performance of the service provided by Webinars was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experiences of using Webinars, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS).

Two in five (43%) were 'Promoters' of Webinars (score of nine or ten), while one in four (24%) were 'Detractors' (score of zero to six) and three in ten (30%) were neutral (score of seven or eight); Chart 3.7.2 provides details. Overall, Webinars had a positive NPS of +19. These figures remain unchanged since 2018/19.

Chart 3.7.2 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 in 2018/19 (333), all respondents who used Webinars in 2019/20 (423)

The likelihood of recommending the service was lower among businesses that were new to exporting (31%), compared with established exporters (46%).

Businesses were asked about ways the service they used **could be improved**. Information was the most frequently cited area for improvement (22%), including requests for more specific or tailored information (11%). One in seven businesses (14%) mentioned improvements to technology, such as website issues. One in ten (10%) made suggestions relating to events, such as more time for questions and answers; and communication (9%), including requests for more feedback or follow-up (7%).

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[29].

Three in four businesses (74%) were satisfied with their experience of Webinars (rating of seven or more out of ten), and this included one in four businesses (24%) who gave a 'very satisfied' rating (ten out of ten). Seven per cent of businesses were dissatisfied (rating of three or below), while 18% gave a neutral rating (between four and six). These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

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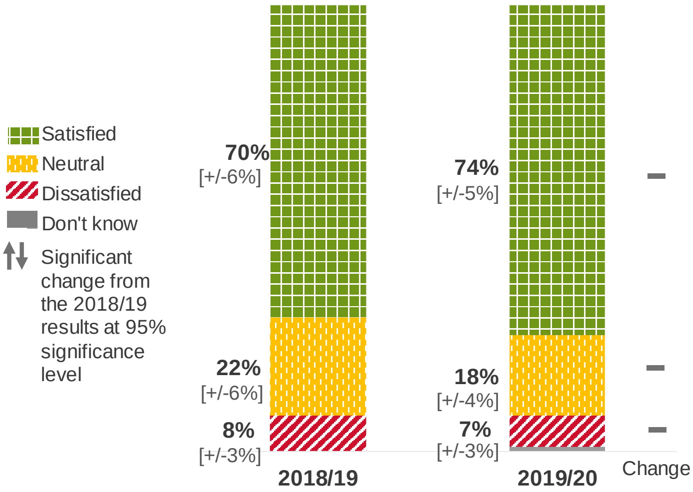
[29] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.

Chart 3.7.3 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, except those giving a 'not applicable' answer in 2018/19 (325) and in 2019/20 (402)

Perceptions of advice and support

This section shows how businesses rated the advice and support they received from Webinars.

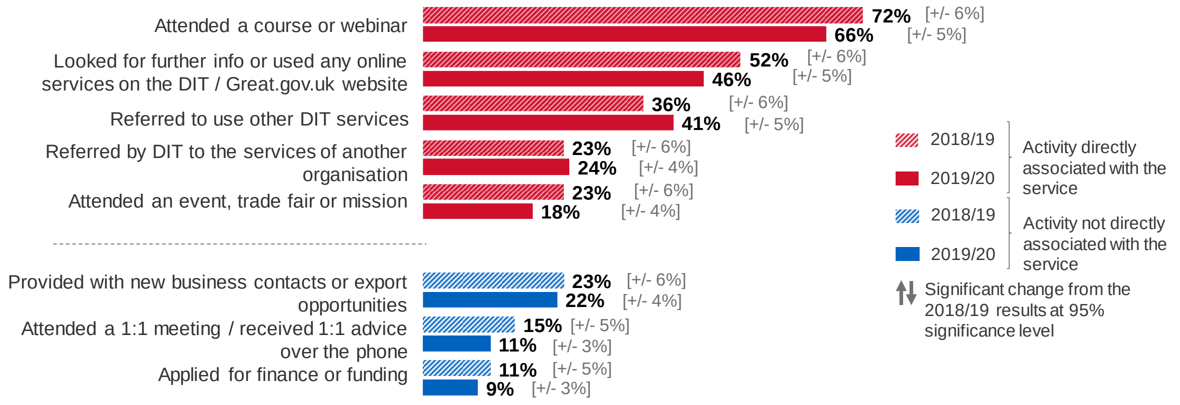
All respondents were asked **what happened when the organisation used the service** (Chart 3.7.4). The chart shows the activities that are most relevant to Webinars (above the dotted line)[30], as well as other activities that businesses may have experienced.

Looking firstly at the activities that are most relevant to Webinars, two-thirds (66%) said they attended a course or webinar, while almost half looked for further information or used any online services on the DIT or Great.gov.uk website (46%) and 41% were referred to use other DIT services. A quarter (24%) were referred to the services of another organisation, while 18% attended an event or trade fair or mission as a result of using the service.

In addition, almost a quarter of businesses (22%) were provided with new business contacts or export opportunities. There were no significant changes since 2018/19.

30 The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.7.4 Specific activities experienced when using Webinars



Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used Webinars (2018/19: 333, 2019/20: 423)

Businesses that only sold services overseas were more likely to have attended a one-to-one meeting or received one-to-one advice over the phone (19%), compared with businesses that only sold goods (8%) or that sold both goods and services (7%).

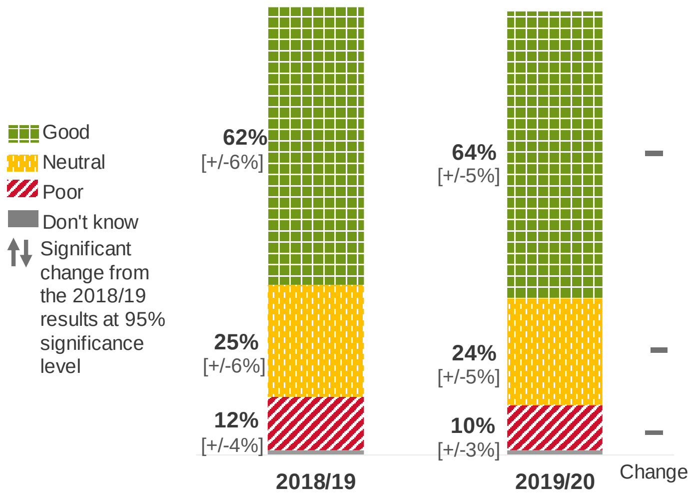
When asked which **specific types of support** they received as part of Webinars, 15% said they received an off-the-shelf overview for existing markets and sectors, 12% received tailored 'route to market' information, nine per cent received market information about competition specific to their products or services, and seven per cent had an analysis of their suppliers and value chain.

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.7.5, two-thirds of businesses (64%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while a quarter (24%) were neutral (score of four to six), and one in ten (10%) said it was poor (rating of zero to three).

These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

Chart 3.7.5 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? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used an ITA, except those giving a 'not applicable' answer in 2018/19 (317) and in 2019/20 (395)

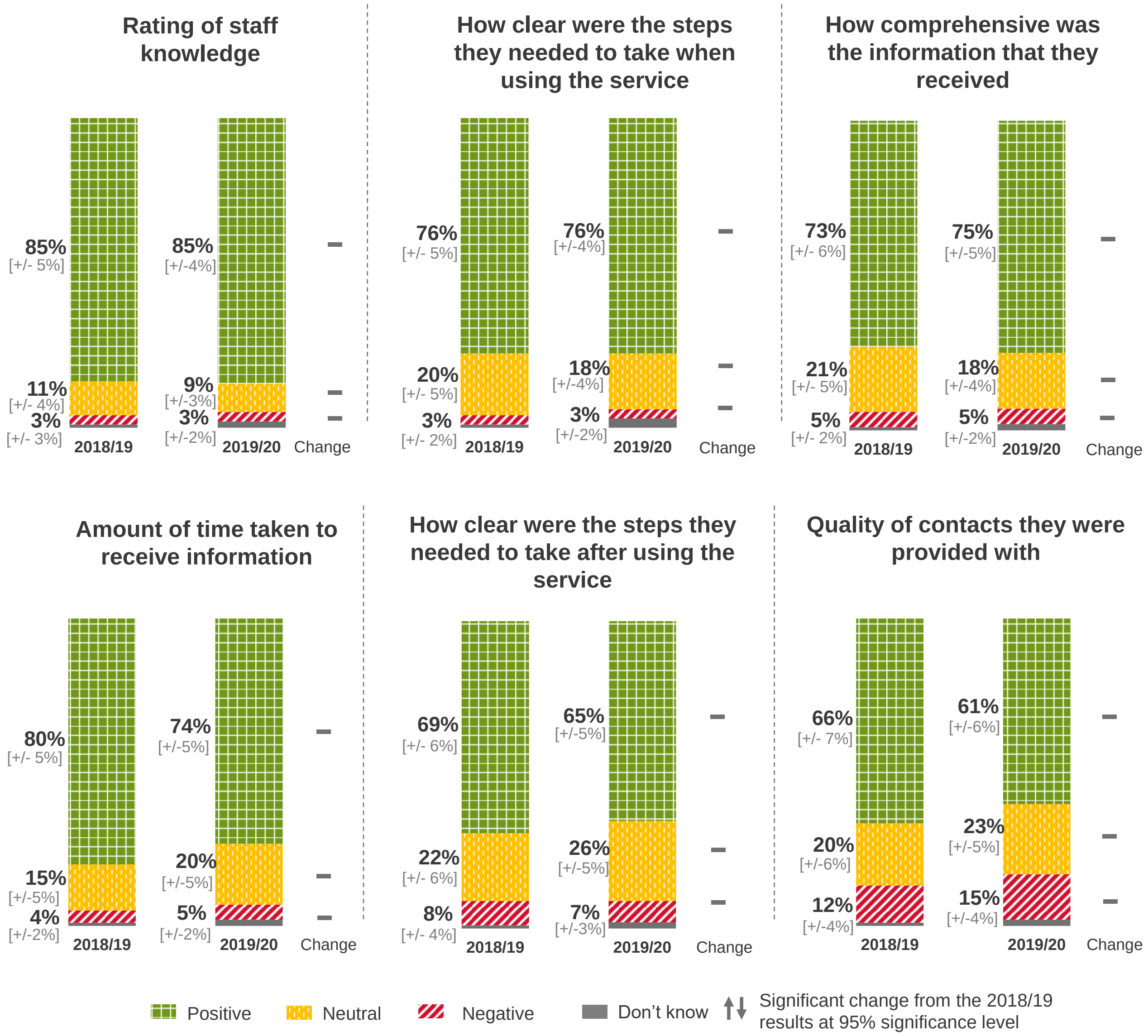
Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Charts 3.7.6 to 3.7.8 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

For each measure, at least half of businesses gave a positive rating for their experience of Webinars, with the highest ratings given for the registration process (91% rated the process as 'straightforward') and staff knowledge (85% rated staff as 'knowledgeable'). Businesses were positive about how easy it was to find support on the service website (78% rated this as 'easy'), the clarity of the steps they needed to take when using the service (76% rated this as 'clear'), how comprehensive the information they received was (75% rated this as 'good') and the amount of time taken to receive information (74% rated this as 'acceptable').

Businesses gave lower ratings for the relevance of referrals to other DIT services (51%).

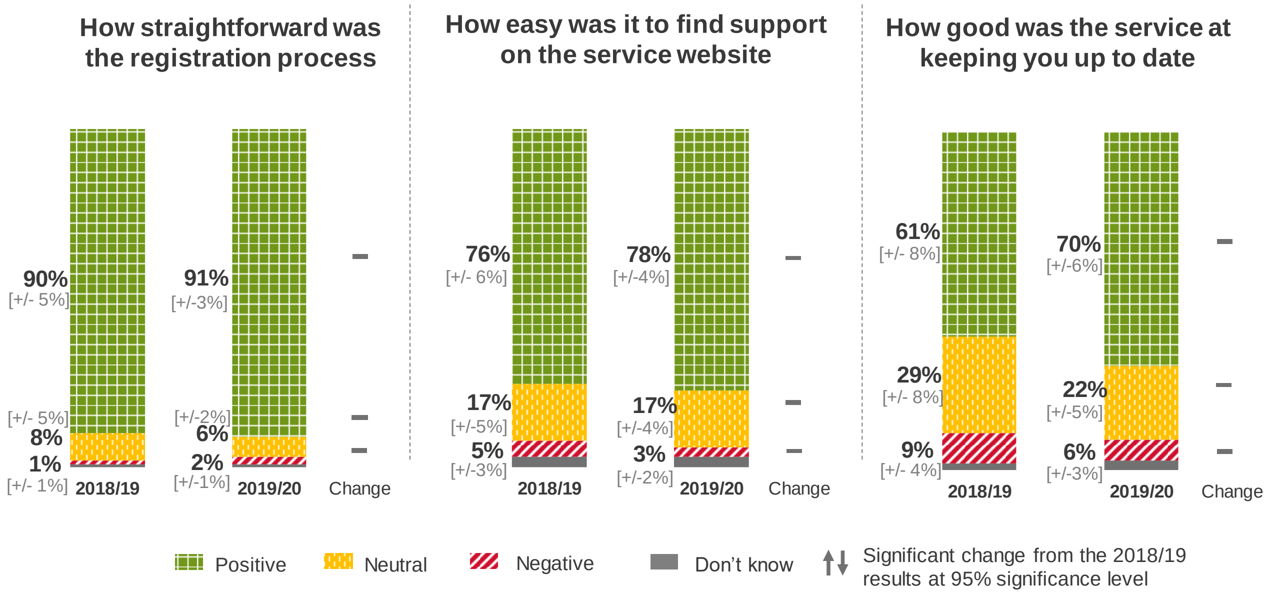
Businesses that were new to exporting were less likely to give positive ratings for the time taken to receive information (57% compared with 77% among established exporters) and the clarity of steps needed after using the service (50% compared with 68%).

Chart 3.7.6 Rating by businesses of the specific advice and support they received – Webinars



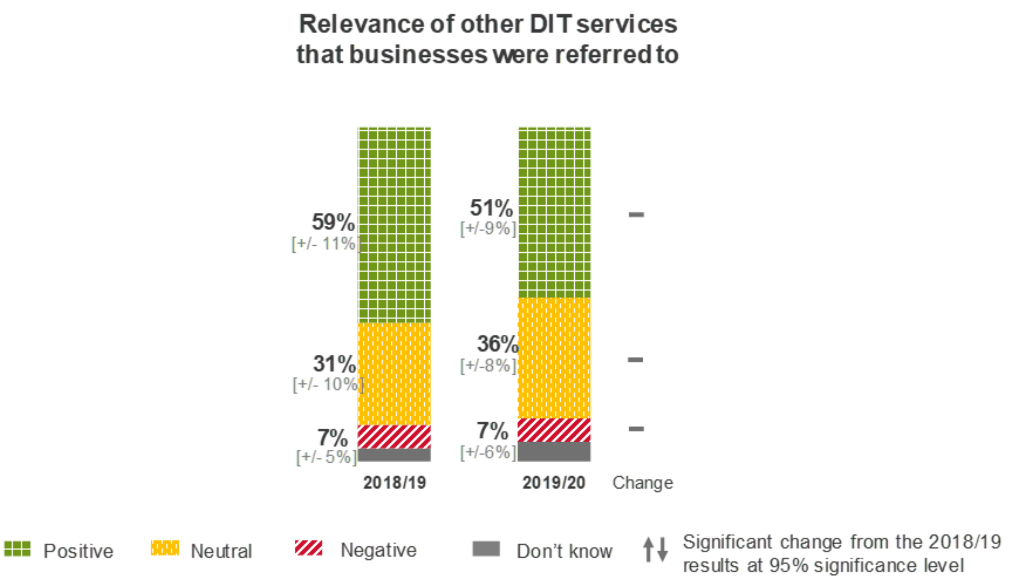
Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (2018/19: 302, 2019/20: 378). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 271, 2019/20: 322). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 322, 2019/20: 386).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 321, 2019/20: 393). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 239, 2019/20: 304). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 309, 2019/20: 377). Base: All businesses that used Webinars, except those giving a 'not applicable' answer.

Chart 3.7.7 Rating by businesses of the organisation of the service, registration process and being kept up-to-date – Webinars



Qreg - How straightforward was the registration process? (2018/19: 327, 2019/20: 405).
Qfindinfo - how easy was it to find support on the service website? (2018/19: 309, 2019/20: 366),
Qupdate - how good was the service at keeping you up to date?? (2018/19: 252, 2019/20: 304) Base: All respondents that used Webinars, except those giving a 'not applicable' answer

Chart 3.7.8 Rating by businesses of the referrals they received – Webinars



Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (2018/19: 117, 2019/20: 166),

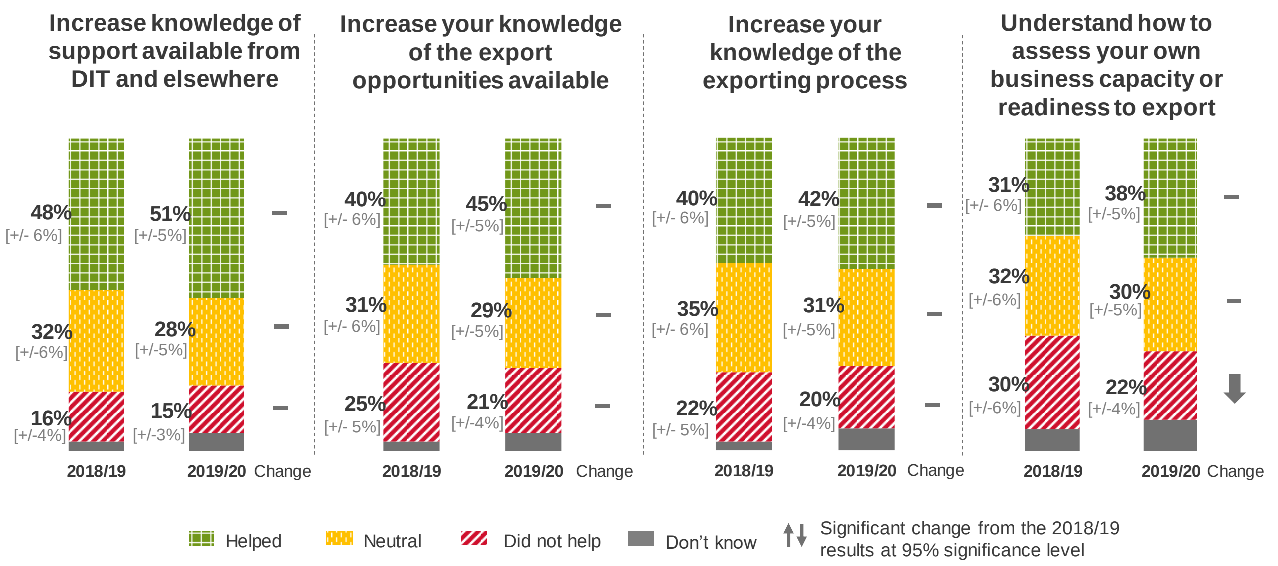
Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from ten (helped a lot) to zero (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.7.9 shows the items that were asked of businesses that used Webinars. This shows that:

- Almost half (45%) of businesses that had used Webinars said that the service helped them by increasing their knowledge of export opportunities available, while 21% said the service did not help them in this way.

- Two in five (42%) businesses said that the service helped them by increasing their knowledge of the exporting process, while one in five (20%) said the service did not help them in this way.
- Half (51%) of businesses that had used Webinars said that the service had helped them increase knowledge of support available from DIT and elsewhere, while 15% said the service did not help them in this way.
- Around four in ten (38%) said that the service had helped them to understand how to assess their own business capacity or readiness to export, while two in ten (22%) said they were not helped in this way, a decrease from 30% in 2018/19.

Businesses that exported online were more likely to say that the service helped them to increase their knowledge of the export opportunities available (49% compared with 35% of those that did not export online).

Chart 3.7.9 Perceptions of help Webinars provided



Qknowchange – Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to …Base All respondents that used Webinars in 2018/19 (333) and 2019/20 (423)

Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with Webinars.

Businesses carried out a **range of actions as a result of using Webinars**. Chart 3.7.10 shows the actions that are most relevant to Webinars (above the dotted line)[31], as well as other actions that businesses may have taken.

Looking firstly at the actions that are most relevant to Webinars, more than half (58%) of businesses who were not exporting at the time of using the service had assessed the company's readiness to export. Half of all businesses (48%) said they had researched the paperwork and

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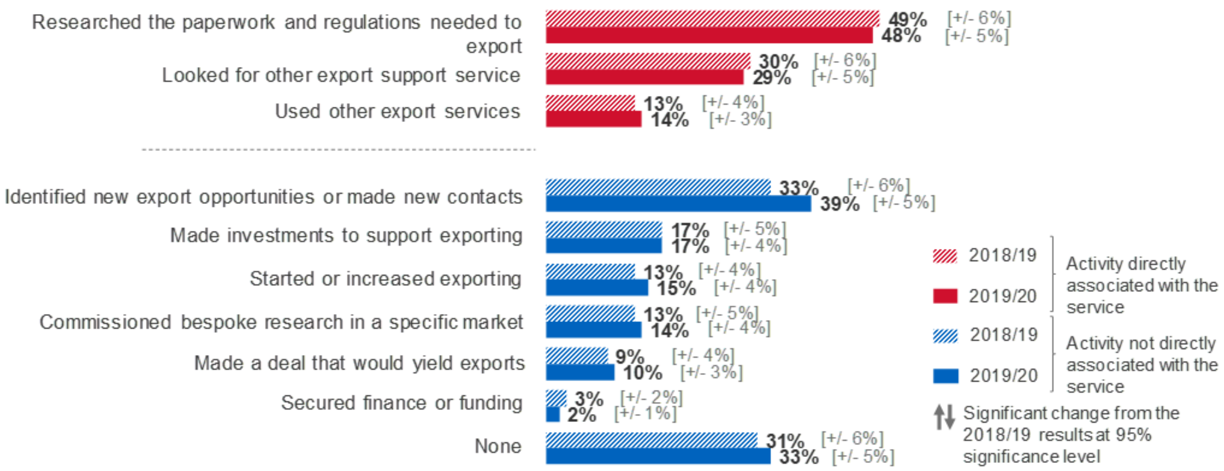
[31] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

regulations needed to export, while three in ten (29%) had looked for other export support services and one in seven (14%) had used other export services.

Other actions (less specific to Webinars) include identifying new export opportunities or making new contacts (39%). One in three businesses (33%) had not undertaken any of the listed actions. There have been no significant changes since 2018/19.

Chart 3.7.10 Actions taken as a result of service interaction - Webinars



Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 1% of respondents.
Base: All respondents who used Webinars (2018/19: 333, 2019/20: 423).

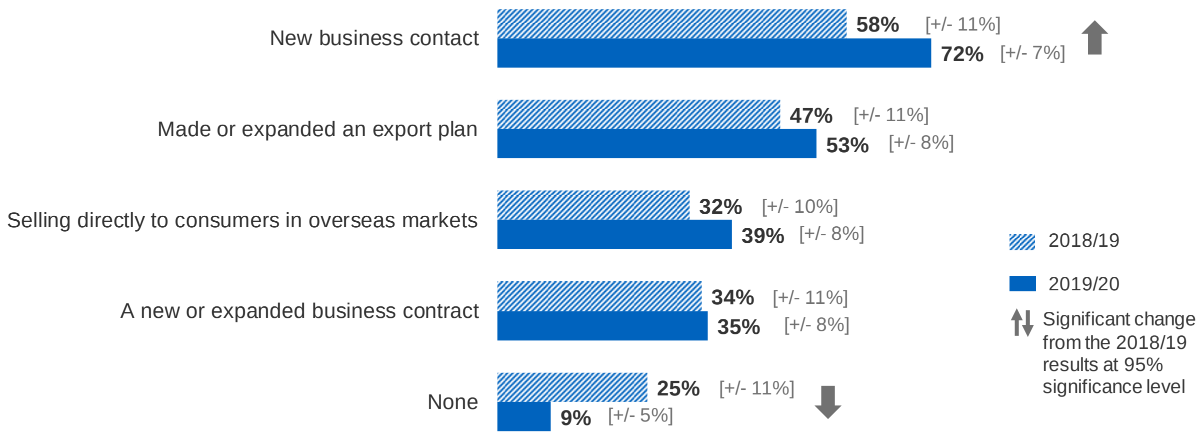
There were differences according to business turnover. Businesses with a turnover of £500,000 or more were more likely than businesses with a turnover of under £500,000 to have carried out a number of actions: researched the paperwork and regulations needed to export (57% compared with 44%), made investments to support exporting (25% compared with 12%) and started or increased exporting (21% compared with 11%).

Businesses that reported having identified, or been provided with, new business contacts or export opportunities as part of the service from Webinars (182 respondents) were asked **what types of opportunities had been identified** (see Chart 3.7.11).

Respondents were most likely to say that they had identified new business contacts (72%), an increase from 58% in 2018/19. The other main opportunities were making or expanding an export plan (53%), selling directly to consumers in overseas markets (39%) and making a new or expanded business contract (35%). Just nine per cent had not done any of these things, a decrease from 25% in 2018/19.

Businesses that exported online were more likely to say they had sold directly to consumers in overseas markets (60%) than businesses that did not export online (23%).

Chart 3.7.11 Opportunities identified as a result of service interaction – Webinars



Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used Webinars who had identified a new business contact as part of the DIT service (2018/19:122, 2019/20: 182)

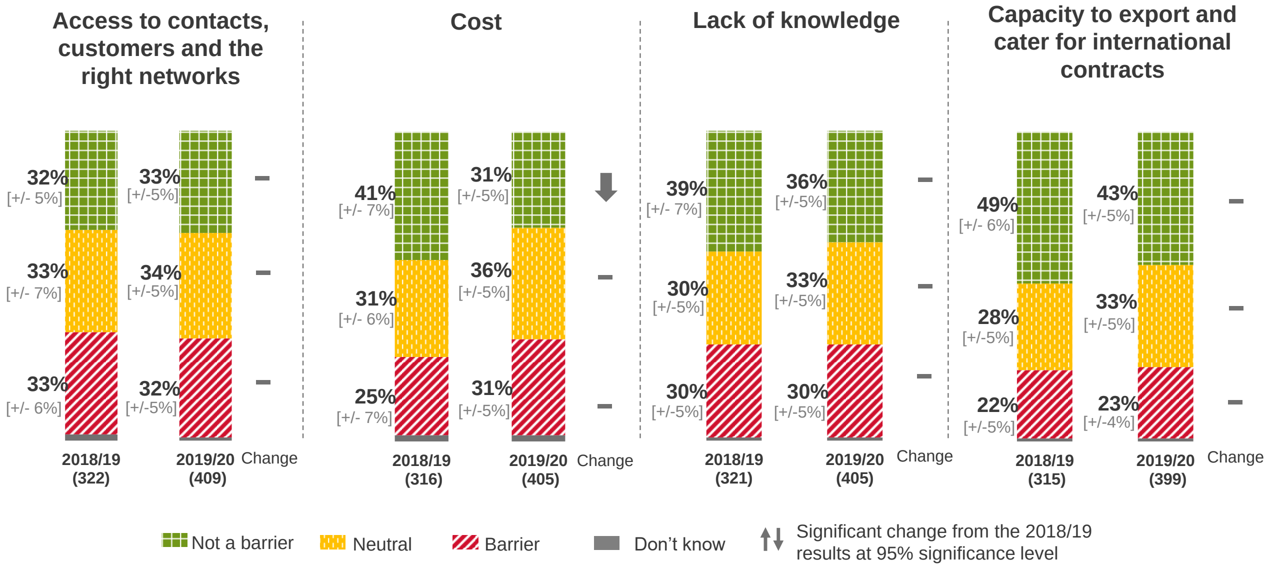
Businesses that had identified a new business contact as part of the Webinars service (134 respondents) were read a list of possible **types of contact** and asked which ones they had made.

Around a third of the businesses that had identified a new contact said they had made contact with a distributor (37%) or a buyer (35%), while around a quarter had made contact with an agent (27%). There have been no significant changes in these figures since 2018/19.

Businesses were asked about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

Around a third of businesses said that access to contracts, customers and the right networks was a barrier for their business (33%), and similar proportions said that cost (31%) and lack of knowledge (30%) were barriers. Businesses were less likely to say that cost was *not* a barrier than in 2018/19 (31% down from 41%). Around a quarter (23%) said that capacity to export and cater for international contracts was a barrier; see Chart 3.7.12.

Chart 3.7.12 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, except those giving a 'not applicable' answer

Capacity to export and cater for international contracts was seen as more of a barrier by businesses with a turnover of under £500,000 than those with a turnover of £500,000 or more (29% compared with 17%), and it was also more likely to be seen as a barrier by businesses that were new to exporting rather than established exporters (40% compared with 20%).

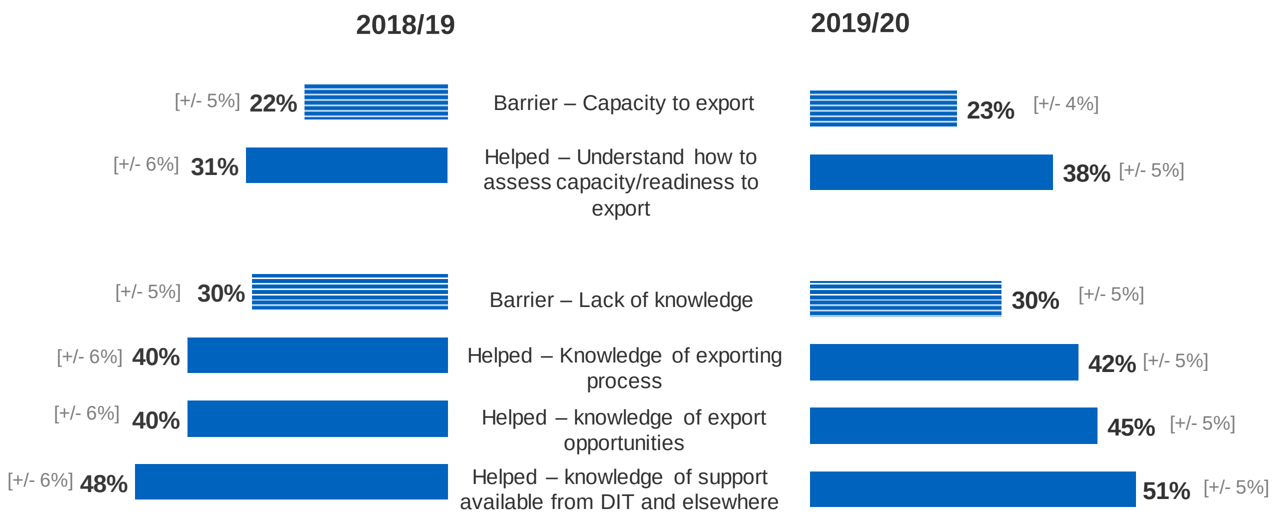
Access to contacts, customers and the right networks was more likely to be reported as a barrier by micro businesses (34%) and small businesses (43%).

Chart 3.7.13 compares responses to questions on the barriers to exporting listed above (specifically lack of knowledge and capacity to export) with business perceptions of how DIT helped them export in various ways.

Around one in four (23%) businesses said that capacity to export was a barrier, while 38% said that Webinars helped them increase their knowledge of export opportunities.

Three in ten (30%) said that lack of knowledge was a barrier; higher proportions said Webinars helped them increase their knowledge of support available (51%), increase knowledge of export opportunities (45%) and increase knowledge of the exporting process (42%).

Chart 3.7.13 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, except those giving a 'not applicable' answer: Capacity 2018/19: 315, 2019/20: 399, Lack of knowledge 2018/19: 321, 2019/20: 405.
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 how to assess capacity or readiness to export / the exporting process / knowledge of export opportunities / knowledge of support available from DIT and elsewhere. Base: All respondents who used Webinars: 2018/19: 333, 2019/20: 423.

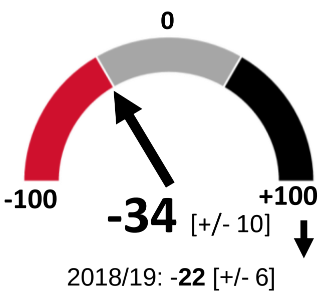
Summary page –
Export Opportunities

2018/19 result

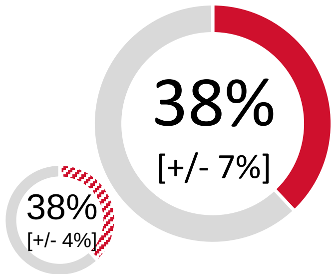
2019/20 result

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

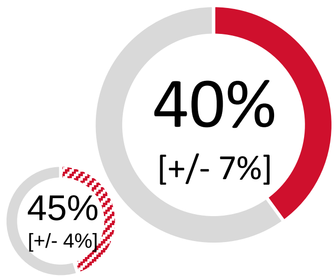
Net Promoter Score



Overall service met needs

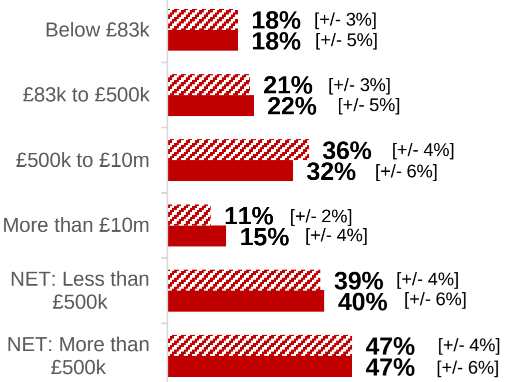


Satisfaction with service

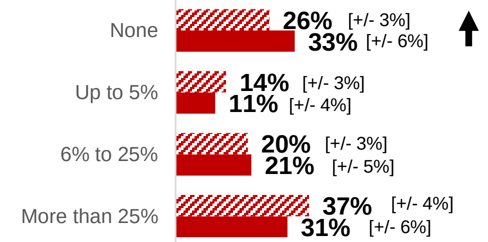


Turnover

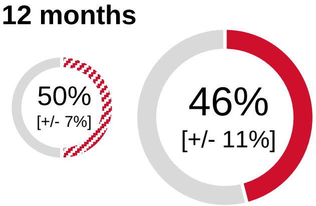
Turnover



% of turnover from exporting

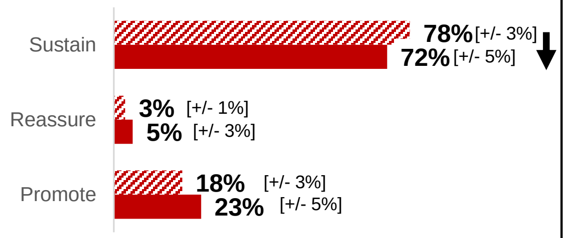


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

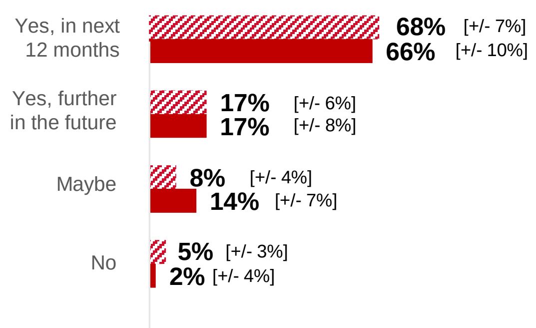


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.8. 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 a third party opportunity 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. This survey only interviews those who expressed an interest in DIT sourced opportunities.

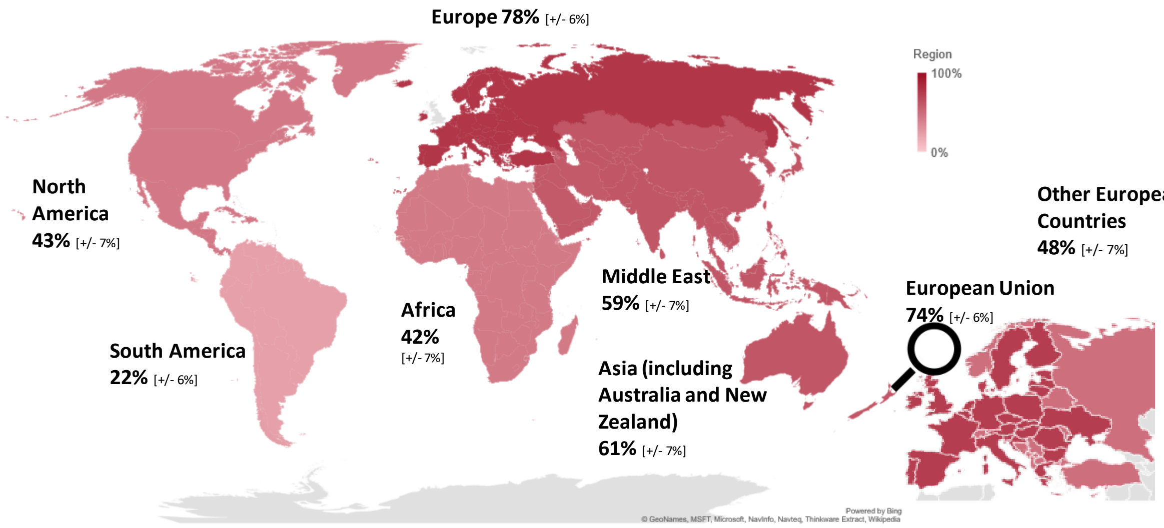
These findings are based on interviews with 297 businesses who used Export Opportunities in April 2019 to March 2020. Seven in ten (69%) sold goods overseas and around half (47%) sold services (53% only sold goods, 31% only sold services and 16% both).

Throughout this section the findings from businesses that used Export Opportunities between April 2019 and March 2020 (2019/20) are compared with the 893 businesses interviewed after using Export Opportunities in April 2018 to March 2019 (2018/19). Significant changes between the two years are reported.

3.8.1. Export Opportunities: Business export status

In total, 72% of businesses currently export by selling goods or services or have done previously. Of these, three in four (74%) have sold within the European Union and half (48%) sold within the rest of Europe. Six in ten sold goods or services in Asia (61%) or the Middle East (59%), while four in ten sold within North America (43%) and in Africa (42%). The least common area was South America (22%). There have been no significant changes since 2018/19.

Chart 3.8.1 Regions organisations exports 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 (225)

Table 3.8.1: Regions organisations exports to or exported to previously - Export Opportunities

	2018/19	2018/19 CI (+/-)	2019/20	2019/20 CI (+/-)	Change*
Europe	**83%**	3%	**78%**	6%	-
European Union	**79%**	3%	**74%**	6%	-
Other European countries	**51%**	4%	**48%**	7%	-
Asia (including Australia and New Zealand)	**58%**	4%	**61%**	7%	-
Middle East	**56%**	4%	**59%**	7%	-
North America	**50%**	4%	**43%**	7%	-
Africa	**40%**	4%	**42%**	7%	-
South America	**26%**	4%	**22%**	6%	-
Base	*727*		*225*		

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

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

3.8.2. Service performance: Export Opportunities

The perceived performance of the service provided by Export Opportunities was explored with the businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

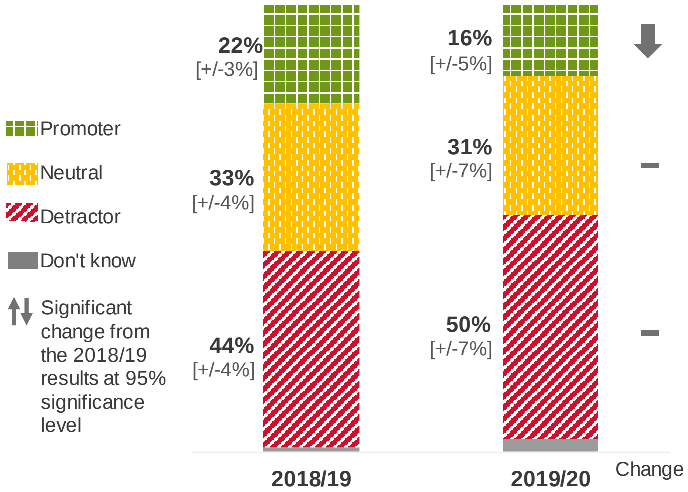
Overall perceptions of service

Businesses were asked, based on their experiences of using Export Opportunities, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely) to produce a rating commonly known as Net Promoter Score (NPS).

One in six businesses (16%) were 'Promoters' of the Export Opportunities website (scores of nine and ten), a decrease from 22% in 2018/19. Half of businesses (50%) were 'Detractors' (scores of zero to six) and 31% were neutral (scores of seven and eight); Chart 3.8.2 provides details. Overall, Export Opportunities had a negative NPS of -34, a significant decrease from the NPS of -22 in 2018/19.

There were no noticeable differences by business type.

Chart 3.8.2 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 in 2018/19 (893), all respondents who used Export Opportunities in 2019/20 (297)

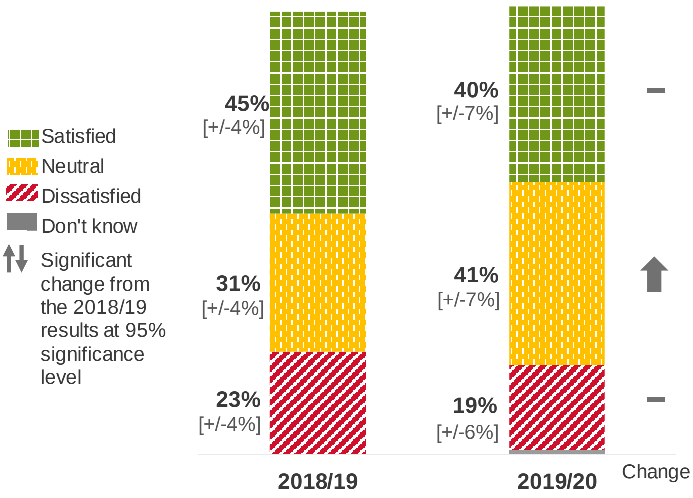
Businesses were asked about ways they thought Export Opportunities **could be improved.** Around a quarter of businesses made suggestions related to information (28%), including 15% who suggested that better or more information would improve the service, and eight per cent who requested more specific or tailored information. Communication was the other main area for improvement (26%), and this was most commonly mentioned in terms of more feedback and follow up (20%).

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[32].

Four in ten (40%) businesses that used the service were satisfied with their overall experience (rating it of seven out of ten or higher), including eight per cent of businesses that were very satisfied (giving a rating of ten out of ten). Four in ten (41%) businesses were neither satisfied nor dissatisfied (giving a rating of between four and six), and this proportion has increased since 2018/19 (from 31%). Two in ten (19%) were dissatisfied with their overall experience (giving a rating of three or lower) and this included seven per cent of businesses that were very dissatisfied (giving a rating of zero). There were no noticeable differences by business type.

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

Chart 3.8.3 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, except those giving a 'not applicable' answer in 2018/19 (882) and in 2019/20 (287)

Perceptions of advice and support

This section shows how businesses rated the advice and support they received from Export Opportunities.

All respondents were asked **what happened when the organisation used the service** (Chart 3.8.4). The chart shows the activities that are most relevant to Export Opportunities (above the dotted line)[33], as well as other activities that businesses may have experienced.

Looking firstly at the activities that are most relevant to Export Opportunities, around half (49%) of businesses were provided with new business contacts or export opportunities as a result of using the service, while four in ten (40%) looked for further information or used online services on the DIT or Great.gov.uk website.

Looking at activities not directly associated with the service, around a quarter of businesses (28%) were referred to use other DIT services. Around a fifth attended an event, trade fair or mission (22%); attended a one-to-one meeting or received one-to-one advice over the phone (21%); or were referred by DIT to the services of another organisation (21%) as a result of using the service.

There were no significant changes since 2018/19, and no noticeable differences by business type.

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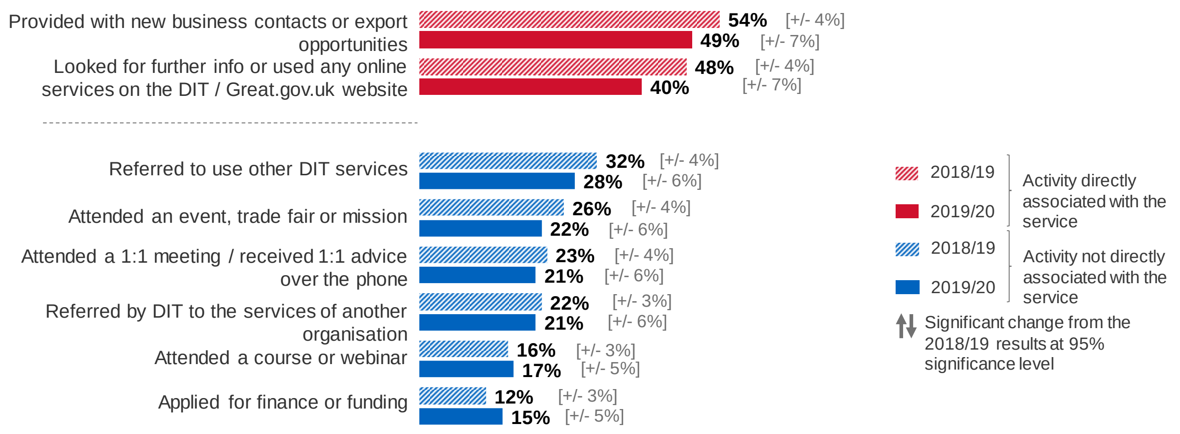
[33] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.8.4 Specific activities experienced when using Export Opportunities



Qoutcome – Did any of the following happen when you [SAMPLED SERVICE]? Table is restricted to answers given by more than 5% of respondents.
Base: All respondents who used Export Opportunities (2018/19: 522, 2019/20: 308)

Businesses that only sold goods overseas were more likely than businesses that only sold services to have been referred to other DIT services (38% compared with 15%) and to have attended a course or webinar (26% compared with 6%). Established exporters were more likely than those who were new to exporting to have been provided with new business contacts or export opportunities (53% compared with 34%).

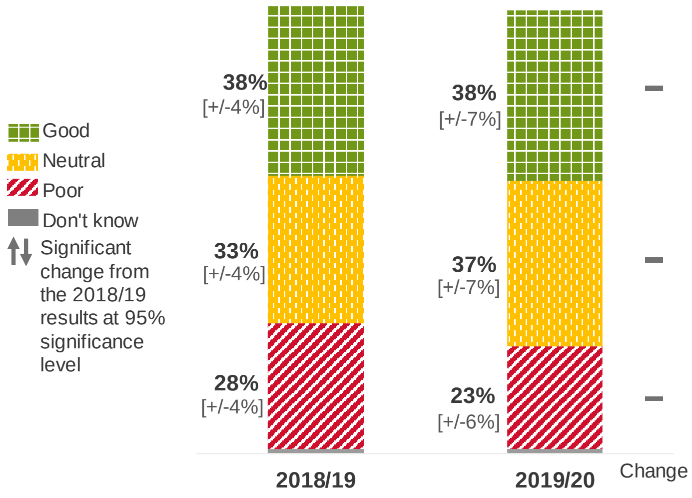
When asked which **specific types of support** they received as part of Export Opportunities, 16% said they received an off-the-shelf overview for existing markets and sectors, 14% received tailored ‘route to market’ information, 13% received market information about competition specific to your products or services, ten per cent received advocacy, lobbying or support for a bid (an increase from 5% in 2018/19) and nine per cent received analysis of suppliers and other players in the value chain (also an increase from 5% in 2018/19).

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.8.5, four in ten (38%) businesses rated Export Opportunities as good at meeting their needs (a score of seven or more out of ten). A quarter (23%) of businesses rated the service negatively when asked how it met their needs (a score of 3 or below), while 37% were neutral (a score between four and six).

These figures remain unchanged since 2018/19, and there were no noticeable differences by business type.

Chart 3.8.5 Rating of whether overall service met needs – Export Opportunities



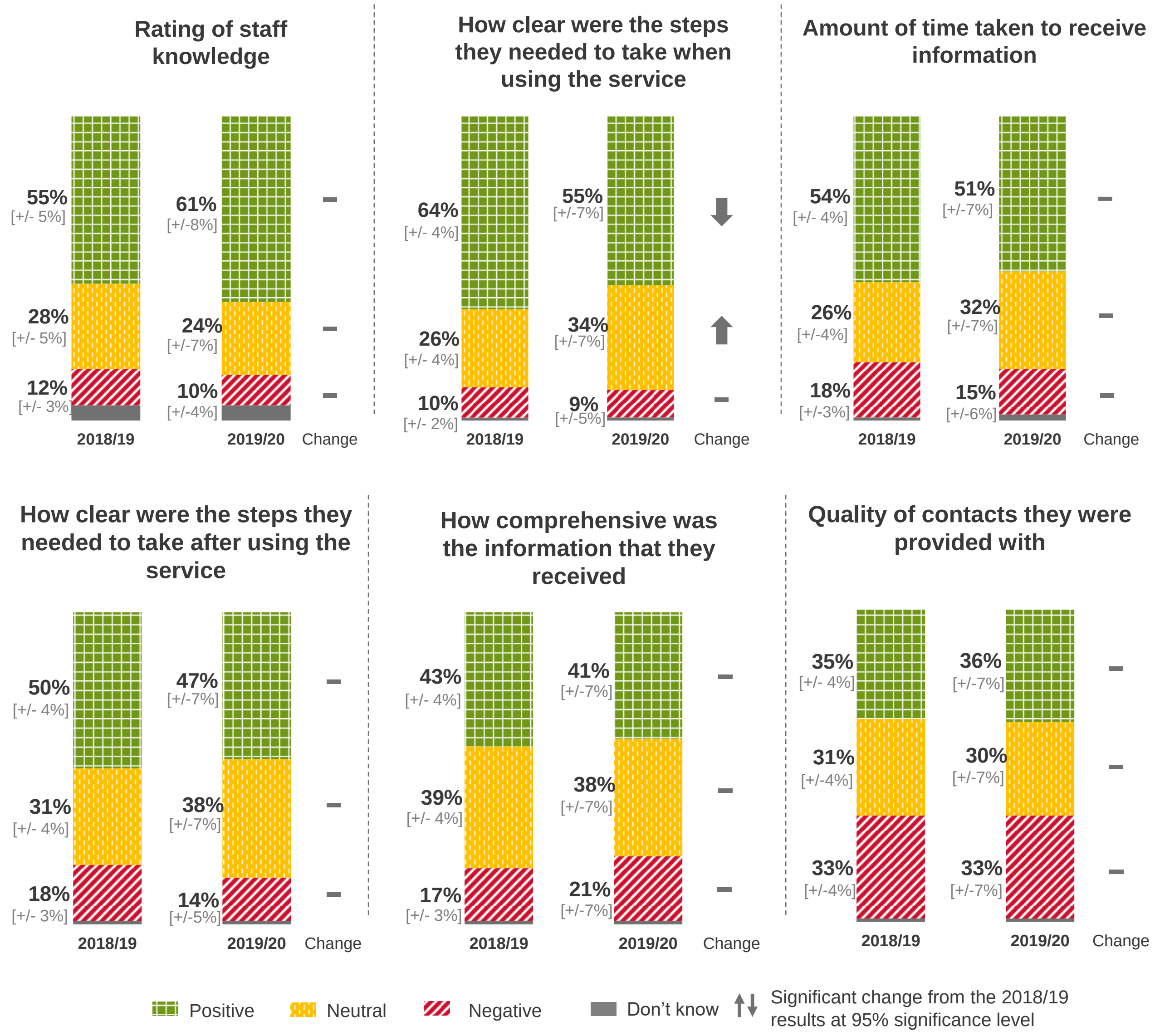
Qqualinfo - Using that same scale, how would you rate... The extent to which the overall service received met your needs? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents who used Export Opportunities, except those giving a 'not applicable' answer in 2018/19 (860) and in 2019/20 (281)

Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Charts 3.8.6 to 3.8.7 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, five to seven are labelled as neutral, and zero to four are marked as negative.

Businesses were most likely to be satisfied with the registration process, with eight in ten (80%) rating this as 'straightforward'. Over six in ten businesses were satisfied with how easy it was to find support on the service website (65%), while slightly fewer were positive towards staff knowledge (61%). Less than half of businesses gave a positive rating for how well the service kept them up-to-date (35%), the quality of the contacts they were provided with (36%), how comprehensive the information they received from the service was (41%) and how clear the steps were after using the service (47%).

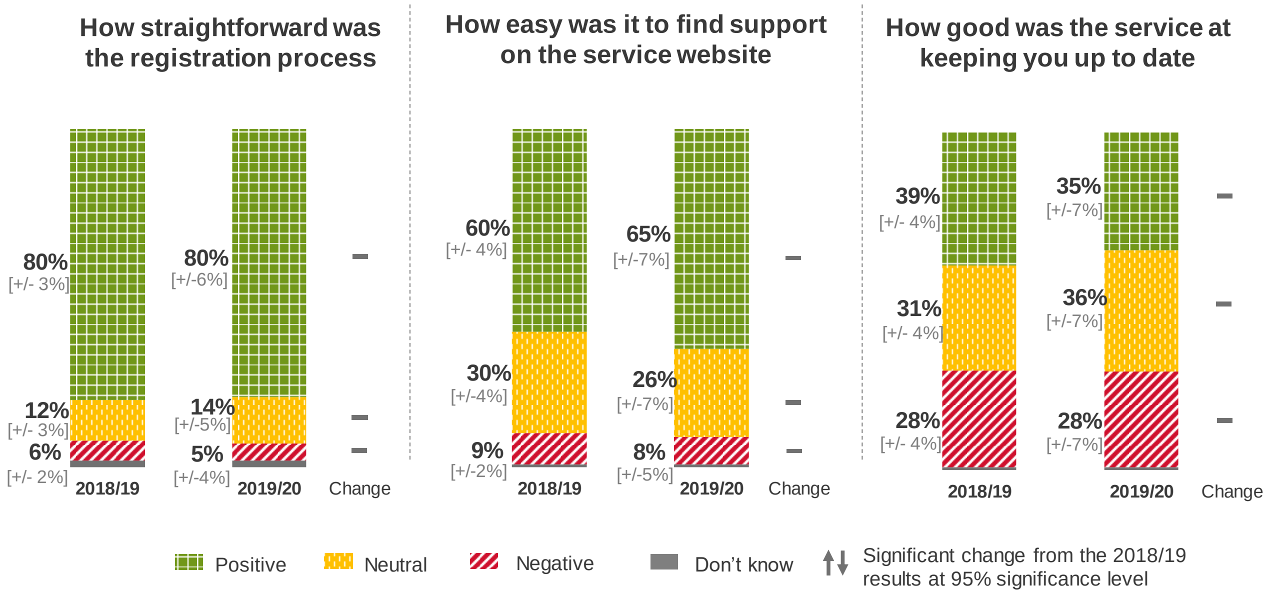
There has been a decrease in the proportion saying it was clear what steps were needed when they were using the service (55%, down from 64% in 2018/19). There were no noticeable differences by business type.

Chart 3.8.6 Rating by businesses 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? (2018/19: 554, 2019/20: 205). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (2018/19: 810, 2019/20: 273). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (2018/19: 849, 2019/20: 271).Qclarity_1 - The service made clear the steps I needed to take when I was using it (2018/19: 870, 2019/20: 283). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (2018/19: 778, 2019/20: 254). Qclarity_2 - The service made clear what I should do next after using it (2018/19: 868, 2019/20: 283). Base: All businesses that used Export Opportunities, except those giving a 'not applicable' answer.

Chart 3.8.7 Rating by businesses of the organisation of the service, registration process and being kept-up-to-date – Export Opportunities



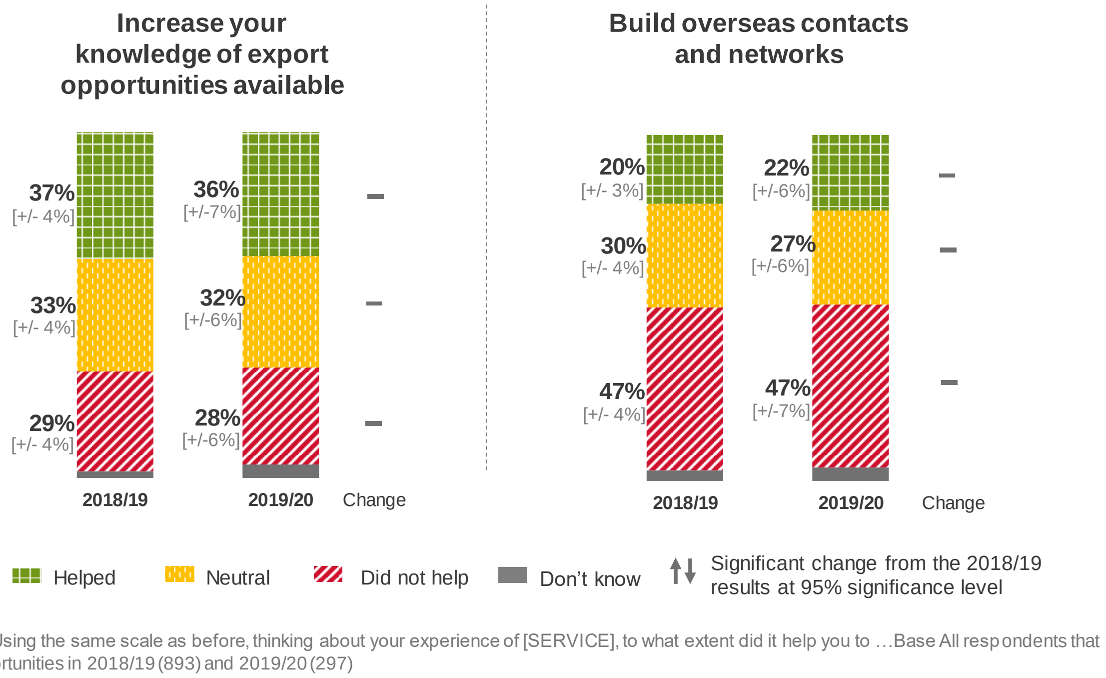
Qreg - How straightforward was the registration process? (2018/19: 868, 2019/20: 283).
Qfindinfo - how easy was it to find support on the service website? (2018/19: 865, 2019/20: 277),
Qupdate - how good was the service at keeping you up to date?? (2018/19: 823, 2019/20: 274) Base: All respondents that used Export Opportunities, except those giving a 'not applicable' answer

Businesses were asked to think about the extent to which the service had **helped them in various ways**, using a scale from ten (helped a lot) to zero (did not help at all). The individual aspects of help and support were tailored to the different services in the survey, and Chart 3.8.8 shows the items that were asked of businesses that used Export Opportunities. This shows that:

- Around a third (36%) of businesses agreed that the service helped the business to increase their knowledge of export opportunities available, while 28% did not think it helped them in this way;
- A fifth (22%) of businesses agreed that the service helped them to build overseas contacts and networks, while almost half (47%) of businesses did not think the service helped in this way.

There were no significant changes compared with 2018/19.

Chart 3.8.8 Perceptions of help Export Opportunities provided



Actions taken as a result of service interaction

A series of questions explored what actions businesses report having taken as a result of their interaction with Export Opportunities.

Businesses carried out a **range of actions as a result of using Export Opportunities**. Chart 3.8.9 shows the actions that are most relevant to Export Opportunities (above the dotted line)[34], as well as other actions that businesses may have taken.

Looking firstly at the actions that are most relevant to Export Opportunities, businesses were most likely to say they identified new export opportunities or made new contacts (46%), while one in five (19%) said they had made a deal that would yield exports, an increase from 11% in 2018/19. Around one in six businesses started or increased exporting (18%) or used other export services (16%).

Other actions (less specific to Export Opportunities) were researching the paperwork and regulations needed to export (38%) and looking for other export support services (28%). More than half (54%) of businesses that had never exported had assessed their company's readiness to export; this figure should be treated with caution due to the small base size.

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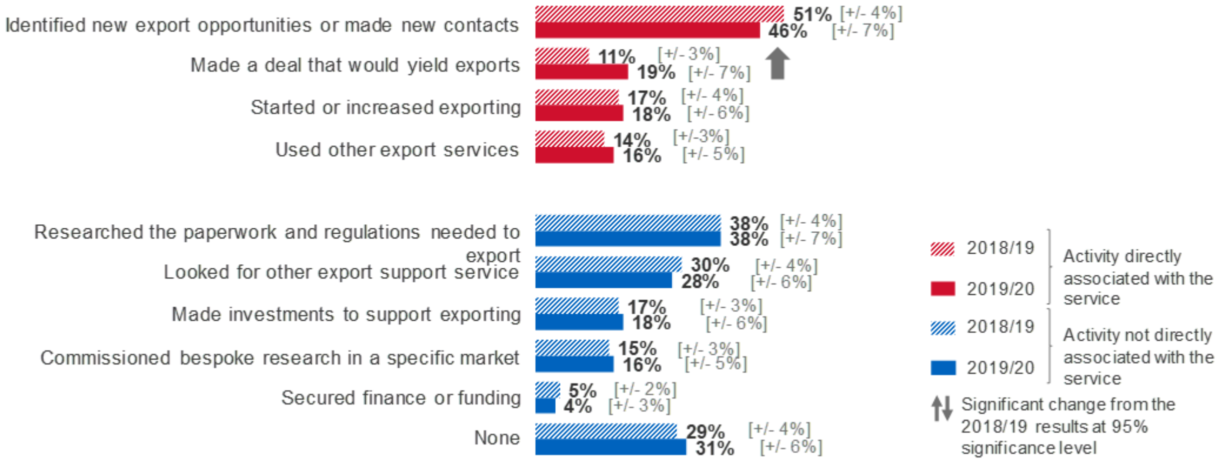
[34] The list of actions associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

Chart 3.8.9 Actions taken as a result of service interaction - Export Opportunities

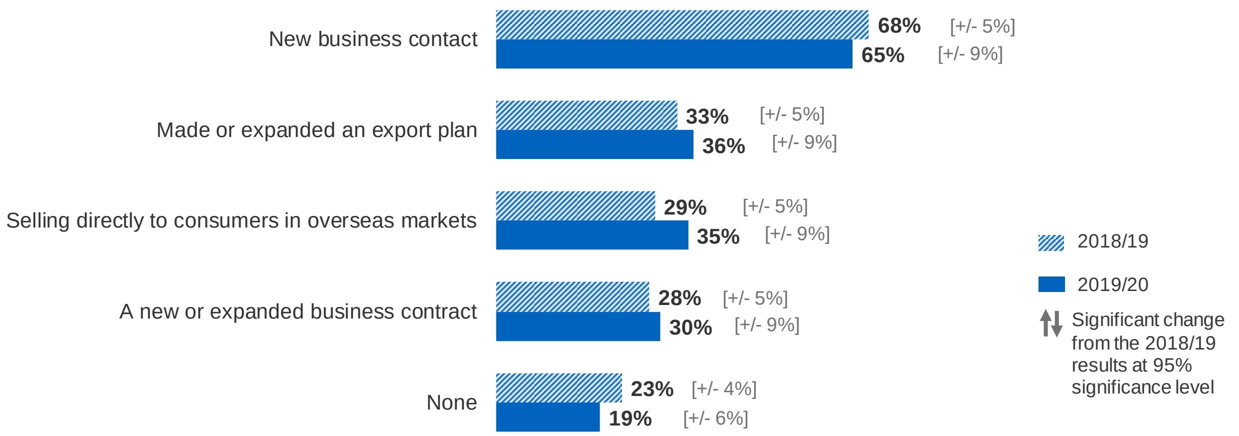


Qresult – What has your business done as a result of [SERVICE]? Chart is restricted to answers given by more than 2% of respondents.
Base: All respondents who used Export Opportunities (2018/19: 893, 2019/20: 297).

Businesses that reported having identified, or been provided with, new business contacts or export opportunities as part of the service from Export Opportunities (178 respondents) were asked **what types of opportunities had been identified** (see Chart 3.8.10).

Two-thirds (65%) of businesses identified new business contacts. Businesses also made or expanded their export plans (36%), sold directly to consumers in overseas markets (35%) or developed a new or expanded business contract (30%). These figures have not changed since 2018/19, and there were no noticeable differences by business type.

Chart 3.8.10 Opportunities identified as a result of service interaction – Export Opportunities



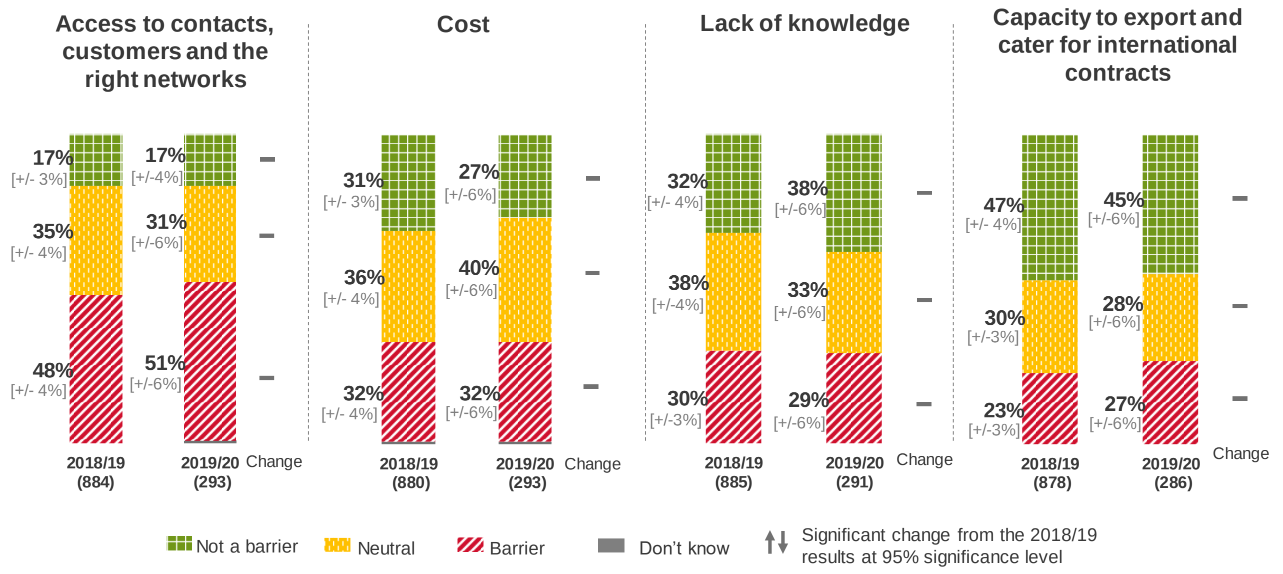
Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used Export Opportunities who had identified a new business contact as part of the DIT service (2018/19: 602, 2019/20: 178)

Businesses that had identified a new business contact as part of the Export Opportunities service (297 respondents) were read a list of possible **types of contact** and asked which ones they had made. More than half of businesses (60%) had made contact with a buyer, while 37% had made contact with a distributor. There have been no significant changes in these figures since 2018/19.

Businesses were asked about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from ten (very strong barrier) to zero (not a barrier at all).

Around half (51%) of businesses indicated that access to contacts, customers and the right networks was a barrier to exporting, including 11% who thought this was a very strong barrier (a score of ten out of ten). Cost was reported as a barrier by a third of businesses (32%), while around three in ten said that lack of knowledge (29%) and capacity to export and cater for international contacts (27%) were barriers; see Chart 3.8.11. There were no significant changes since 2018/19.

Chart 3.8.11 Barriers to exporting – Export Opportunities



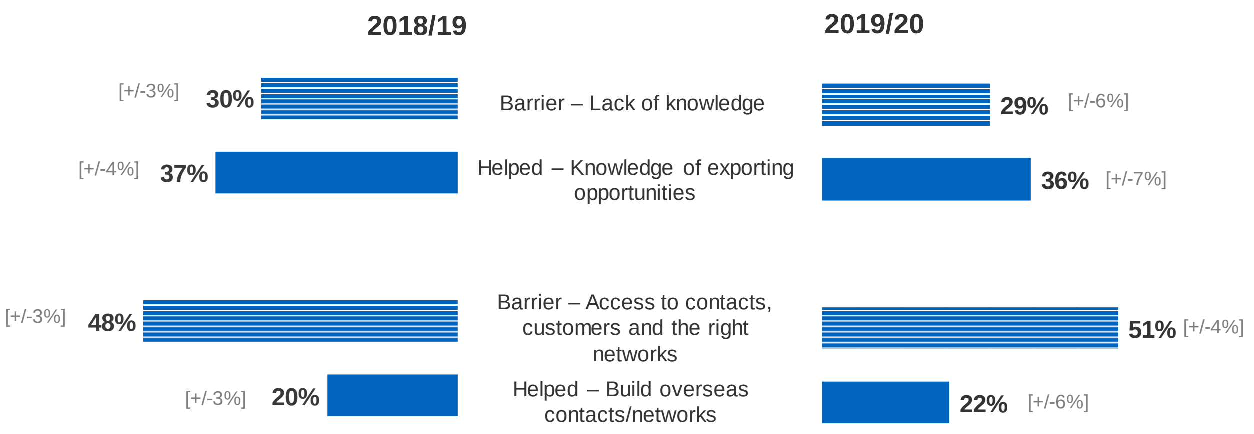
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export Opportunities, except those giving a 'not applicable'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

Businesses that were new to exporting were more likely to say that capacity was a barrier (39% compared with 24% of established exporters). Capacity was also more a barrier for businesses with a turnover of under £500,000 (34%) than for those with a turnover of £500,000 or more (17%).

Chart 3.8.12 compares responses to questions on the barriers to exporting listed above (specifically access to contacts and lack of knowledge) with business perceptions of how DIT helped them export (by increasing their knowledge of export opportunities available and building overseas contacts and networks).

Three in ten businesses (29%) said that lack of knowledge was a barrier to exporting and 36% said that Export Opportunities helped them increase their knowledge of export opportunities available. More than twice as many businesses said that access to contacts and networks was a barrier as said that DIT helped them build contacts and networks (51% and 22% respectively).

Chart 3.8.12 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, except those giving a 'not applicable' answer: Lack of knowledge 2018/19: 885, 2019/20: 291, Access to contacts, customers and the right networks 2018/19: 884, 2019/20: 293. 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 exporting opportunities / Build overseas contacts and networks. Base: All respondents who used Export Opportunities: 2018/19: 893, 2019/20: 297.

4. Comparison Between Services

This section provides a comparison between services and products on key measures. It also includes analysis by type of service or product, using a broad distinction between digital products (Business Profiles, Export Opportunities, Selling Online Overseas and Webinars) and non-digital services (ITAs, TAP, Missions, OBNI, OMIS, Posts and Sector Teams).

Please note that any changes in the perceptions of digital and non-digital service deliveries may be driven by the sample composition changes from 2018/19 to 2019/20. For example, there was a large decrease in the proportion of Export Opportunities (from 65% to 35%) and an increase in the proportion of Webinars (from 24% to 50%) that make up the digital group (see table 4.1). In 2019/20 Export Opportunities were more likely than Webinars to be dissatisfied (19% compared to 7%) and less likely than Webinars to be satisfied (40% compared to 74%) with the overall service they received (see table 4.2). A decrease in the proportion of Export Opportunities and increase in the proportion of Webinars from 2018/19 to 2019/20 may have had a positive effect on satisfaction levels between the years.

Table 4.1: Number of service deliveries interviewed as a proportion of total non-digital and digital sample, by year

Non-Digital	18/19		19/20		
	Uwtd	(% of non-digital sample)	Uwtd	(% of non-digital sample)	Change of non-digital sample from 18/19 (percentage points)
TAP	369	9%	179	4%	-5 pp
ITA	2,001	49%	2,402	58%	+9 pp
Missions	167	4%	189	5%	+1 pp
OBNI	154	4%	198	5%	+1 pp
OMIS	141	3%	89	2%	-1 pp
Posts	748	18%	765	19%	+0 pp
Sector Teams	522	13%	308	7%	-5 pp
Total non-digital sample	**4,102**		**4,130**		

Digital	18/19		19/20		
	Uwtd	(% of digital sample)	Uwtd	(% of digital sample)	Change of digital sample from 18/19 (percentage points)
Webinars	333	24%	423	50%	+26 pp
Export Opportunities	893	65%	297	35%	-29 pp
Business Profiles	158	11%	99	12%	+1 pp
Total digital sample	**1,384**		**847**		

4.1. Overall perceptions of service

Businesses were asked to think of their overall experience of the service or product and say **how satisfied they were**, rating the service or product on a scale from 0 (very dissatisfied) to 10 (very satisfied)[35].

Levels of satisfaction varied between the different services and products, as shown in Table 4.2. Users of TAP were most likely to be satisfied (88%), followed by users of Missions (85%), ITAs (77%) and Posts (76%). By contrast, less than half of users of Export Opportunities were satisfied (40%).

Findings were mostly consistent when comparing 2018/19 with 2019/20. There was a small increase in dissatisfied ratings for ITAs (up from 4% to 6%) and a corresponding decrease in neutral ratings (down from 19% to 17%). There was also an increase in neutral ratings for Export Opportunities (up from 31% to 41%).

Table 4.2: Satisfaction with overall experience, by product or service

Non-Digital	TAP 18/19	TAP 19/20	Significant Change	ITAs 18/19	ITAs 19/20	Significant Change
Satisfied	89%	88%	-	76%	77%	-
Neutral	10%	10%	-	19%	17%	↓
Dissatisfied	1%	3%	-	4%	6%	↑
Don't know	0%	0%	-	0%	1%	-
Unweighted base	366	177	-	1,982	2,373	-

Non-Digital	Missions 18/19	Missions 19/20	Significant Change	OBNI 18/19	OBNI 19/20	Significant Change
Satisfied	77%	85%	-	58%	61%	-
Neutral	19%	14%	-	27%	22%	-
Dissatisfied	4%	1%	-	16%	16%	-
Don't know	0%	0%	-	0%	2%	-
Unweighted base	165	183	-	150	188	-

Non-Digital	Posts 18/19	Posts 19/20	Significant Change	Sector Teams 18/19	Sector Teams 19/20	Significant Change
Satisfied	73%	76%	-	78%	74%	-

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

Neutral	16%	16%	-	15%	19%	-
Dissatisfied	9%	7%	-	6%	7%	-
Don't know	1%	1%	-	1%	0%	-
Unweighted base	725	725	-	500	292	-

Digital	Webinars 18/19	Webinars 19/20	Significant Change	Export Opportunities 18/19	Export Opportunities 19/20	Significant Change
Satisfied	70%	74%	-	45%	40%	-
Neutral	22%	18%	-	31%	41%	↑
Dissatisfied	8%	7%	-	23%	19%	-
Don't know	0%	1%	↑	0%	1%	-
Unweighted base	325	402	-	882	287	-

Source: Qsatis - Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service?
Note: an asterisk (*) denotes a value of less than 0.5 per cent.
Base: All respondents except those giving a 'not applicable' answer

Satisfaction was higher for non-digital services than digital products (76% and 58% satisfied respectively), as shown in Table 4.3. Dissatisfied ratings were also more common for digital products (16%) than for non-digital services (seven per cent).

Satisfaction with digital products was higher than in 2018/19, with an increase in positive ratings (up from 50% to 58%) and a decrease in negative ratings (down from 21% to 16%). However, please note that the changes in perceptions of digital products may be driven by the sample composition changes of the digital group from 2018/19 to 2019/20.

Table 4.3: Satisfaction with overall experience, digital products and non-digital services

	Non-digital 2018/19	Non-digital 2019/20	Significant Change	Digital 2018/19	Digital 2019/20	Significant Change
Satisfied	76%	76%	-	50%	58%	↑
Neutral	18%	17%	-	30%	25%	-
Dissatisfied	6%	7%	-	20%	16%	↓
Don't know	1%	1%	-	0%	1%	-
Unweighted base	4,027	4,025		1,359	810	

Source: 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 except those giving a 'not applicable' answer

Businesses were asked, based on their experiences of the sampled service or product, **how likely it was that they would recommend using it** to a colleague or business associate who had similar needs to their own. They answered on a scale from ten (extremely likely) to zero (not at all likely). known as Net Promoter Score (NPS).

As shown in Table 4.4, seven services had a positive NPS. TAP had the highest (+63), followed by ITAs (+37). Export Opportunities was the only service/product that had a negative NPS (-34), and this was a significant decrease from the NPS in 2018/19 (-22). The proportion of 'Promoters' of Export Opportunities also showed a significant decrease from 2018/19 (down from 22% to 16%).

Table 4.4: Net promoter score (NPS), by product or service

Non-Digital	TAP 18/19	TAP 19/20	Significant Change	ITAs 18/19	ITAs 19/20	Significant Change
Promoters	70%	69%	-	54%	54%	-
Neutral	21%	22%	-	27%	28%	-
Detractors	7%	7%	-	18%	17%	-
Don't know	1%	2%	-	1%	1%	-
NPS	+63	+63	-	+35	+37	-
Unweighted base	369	179		2,001	2,402	

Non-Digital	Missions 18/19	Missions 19/20	Significant Change	OBNI 18/19	OBNI 19/20	Significant Change
Promoters	47%	48%	-	34%	39%	-
Neutral	30%	35%	-	30%	28%	-
Detractors	22%	14%	-	34%	28%	-
Don't know	1%	3%	-	2%	5%	-
NPS	+25	+33	-	0	+12	-
Unweighted base	167	189		154	198	

Non-Digital	Posts 18/19	Posts 19/20	Significant Change	Sector Teams 18/19	Sector Teams 19/20	Significant Change
Promoters	47%	47%	-	41%	42%	-
Neutral	31%	30%	-	37%	35%	-
Detractors	20%	18%	-	18%	20%	-
Don't know	3%	5%	-	4%	3%	-
NPS	+27	+30	-	+22	+22	-
Unweighted base	748	765		522	308	

Digital	Webinars 18/19	Webinars 19/20	Significant Change	Export Opportunities 18/19	Export Opportunities 19/20	Significant Change
Promoters	42%	43%	-	22%	16%	↓
Neutral	35%	30%	-	33%	31%	-
Detractors	22%	24%	-	44%	50%	-
Don't know	1%	3%	↑	1%	3%	-
NPS	+19	+19	-	-22	-34	↓
Unweighted base	333	423		893	297	

Source: 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?
Note: an asterisk (*) denotes a value of less than 0.5 per cent.
Base: All respondents

The NPS for non-digital services was +31. Around half of businesses were 'Promoters' of non-digital services (49%), while 18% were 'Detractors'. Digital products had a much lower NPS (-7). Three in ten businesses (30%) were 'Promoters' of digital products, while 37% were 'Detractors'.

There were no significant changes in these figures since 2018/19.

Table 4.5: Net promoter score (NPS), digital products and non-digital services

	Non-digital	Non-digital	Significant Change	Digital	Digital	Significant Change
	2018/19	**2019/20**	-	**2018/19**	**2019/20**	-
Promoters	50%	49%	-	26%	30%	-
Neutral	30%	30%	-	32%	30%	-
Detractors	19%	18%	-	40%	37%	-
Don't know	2%	3%	-	1%	3%	↑
NPS	+31	+31	-	-14	-7	-
Unweighted base	4,102	4,130		1,384	847	

Source: 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

Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Table 4.6, businesses were most likely to rate TAP as 'good' in meeting their needs (81% gave a score of seven or more out of ten), while around seven in ten gave 'good' ratings for Missions (73%) and ITAs (70%). Fewer than four in ten gave 'good' ratings for Export Opportunities (38%).

The only significant change since 2018/19 was a decrease in the proportion of neutral ratings for ITAs (down from 24% to 21%).

Table 4.6: Rating of whether overall service met their needs, by product or service

Non-Digital	TAP 18/19	TAP 19/20	Significant Change	ITAs 18/19	ITAs 19/20	Significant Change
Good	82%	81%	-	67%	70%	-
Neutral	15%	12%	-	24%	21%	-
Poor	2%	6%	-	9%	9%	↓
Don't know	0%	1%	-	1%	1%	-
Unweighted base	362	173	-	1,942	2,339	-

Non-Digital	Missions 18/19	Missions 19/20	Significant Change	OBNI 18/19	OBNI 19/20	Significant Change
Good	67%	73%	-	53%	55%	-
Neutral	26%	23%	-	27%	26%	-
Poor	7%	3%	-	19%	18%	-
Don't know	0%	1%	-	1%	0%	-
Unweighted base	164	179	-	146	188	-

Non-Digital	Posts 18/19	Posts 19/20	Significant Change	Sector Teams 18/19	Sector Teams 19/20	Significant Change
Good	68%	66%	-	67%	67%	-
Neutral	22%	23%	-	22%	23%	-
Poor	9%	10%	-	11%	10%	-
Don't know	1%	1%	-	0%	1%	-
Unweighted base	721	724	-	490	282	-

Digital	Webinars 18/19	Webinars 19/20	Significant Change	Export Opportunities 18/19	Export Opportunities 19/20	Significant Change
Good	62%	64%	-	38%	38%	-
Neutral	25%	24%	-	33%	37%	-
Poor	12%	10%	-	28%	23%	-
Don't know	1%	1%	-	1%	1%	-

Unweighted base	325	402	-	860	281	-

Source - Using that same scale, how would you rate... The extent to which the overall service received met your needs? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents except those giving a 'not applicable' answer.

Two-thirds of businesses that used non-digital services said they were good at meeting their needs (68% gave a score of seven or more out of ten), while around half said this about digital products (52%). One in five businesses (19%) said that digital products were poor at meeting their needs (score of zero to three), while nine per cent gave a poor rating for non-digital services.

There has been an increase in positive ratings for digital products since 2018/19 (up from 42% to 52%), alongside a decrease in negative ratings (from 25% to 19%). However, please note that the changes in perceptions of digital products may be driven by the sample composition changes of the digital group from 2018/19 to 2019/20.

Table 4.7: Rating of whether overall service met their needs, digital products and non-digital services

	Non-digital 2018/19	Non-digital 2019/20	Change	Digital 2018/19	Digital 2019/20	Change
Good	67%	68%	-	43%	52%	↑
Neutral	23%	22%	-	31%	28%	-
Poor	9%	9%	-	25%	19%	↓
Don't know	1%	1%	-	1%	1%	-
Unweighted base	3,962	3,972		1,323	793	

Source - Using that same scale, how would you rate... The extent to which the overall service received met your needs? IF NECESSARY: Please think about the information or support you were seeking from [SAMPLED SERVICE].
Base: All respondents except those giving a 'not applicable' answer

5. 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.

5.1. When businesses first used the DIT service

Businesses were asked when they first started using a service or product provided by DIT (or its predecessor, UKTI). For some, the service or product they had recently used was their first experience of a DIT (or UKTI) service: the proportion ranged from 21% for users of Export Opportunities to 11% for users of TAP.

At the other extreme, some businesses started using a DIT (or UKTI) service more than five years ago, ranging from 32% for users of Sector Teams to 16% for users of Export Opportunities.

There have been some changes since 2018/19:

- A decrease in the proportion of TAP users that were using a DIT (or UKTI) service for the first time (down from 23% to 11%), with an increase in the proportion that first used a service between one and five years ago (up from 30% to 42%).
- A decrease in the proportion of ITA users that were using a DIT (or UKTI) service for the first time (down from 24% to 19%) or that first used a service between one and five years ago (down from 31% to 28%), with an increase in the proportion that first used a service more than five years ago (up from 22% to 25%).
- A decrease in the proportion of OBNI users that were using a DIT (or UKTI) service for the first time (down from 29% to 16%), with an increase in the proportion that first used a service less than a year ago (up from 15% to 26%).
- A decrease in the proportion of OMIS users that were using a DIT (or UKTI) service for the first time (down from 22% to 9%).
- An increase in the proportion of Webinars users that first used a service less than a year ago (up from 9% to 16%).

Table 5.1: When businesses first started using a DIT service, by product or service

Non-Digital	TAP 18/19	TAP 19/20	Significant Change	ITAs 18/19	ITAs 19/20	Significant Change
This was the first time	23%	11%	↓	24%	19%	↓
Less than 1 year	18%	15%	-	18%	20%	-
Between 1 and 5 years	30%	42%	↑	31%	28%	↓
More than 5 years	23%	22%	-	22%	25%	↑
Don't know	7%	10%	-	5%	8%	↑
Unweighted base	369	179	-	2,001	2,402	-

Non-Digital	Missions 18/19	Missions 19/20	Significant Change	OBNI 18/19	OBNI 19/20	Significant Change
This was the first time	24%	17%	-	29%	16%	↓
Less than 1 year	16%	15%	-	15%	26%	↑
Between 1 and 5 years	29%	35%	-	28%	28%	-
More than 5 years	24%	22%	-	23%	22%	-
Don't know	8%	10%	-	5%	9%	-
Unweighted base	167	189	-	154	198	-

Non-Digital	Posts 18/19	Posts 19/20	Significant Change	Sector Teams 18/19	Sector Teams 19/20	Significant Change
This was the first time	14%	13%	-	16%	17%	-
Less than 1 year	16%	17%	-	14%	16%	-
Between 1 and 5 years	32%	30%	-	31%	28%	-
More than 5 years	31%	29%	-	29%	32%	-
Don't know	7%	11%	↑	10%	7%	-
Unweighted base	748	765	-	522	308	-

Digital	Webinars 18/19	Webinars 19/20	Significant Change	Export Opportunities 18/19	Export Opportunities 19/20	Significant Change
This was the first time	14%	14%	-	22%	21%	-
Less than 1 year	9%	16%	↑	19%	18%	-
Between 1 and 5 years	30%	33%	-	38%	33%	-
More than 5 years	34%	27%	-	18%	16%	-
Don't know	12%	9%	-	4%	11%	↑
Unweighted base	333	423	-	893	297	-

Source: Qfirstdit - When did you first start using a DIT (or its predecessor, UKTI) service?
Base: All respondents

5.2. How businesses first heard about DIT

Businesses were asked how they first heard about DIT (or its predecessor, UKTI). For all services or products except Export Opportunities, the most frequent way of finding out about DIT was through contacts in the private sector, with the highest proportion among users of TAP (34%). The most frequent way of finding out about DIT among users of Export Opportunities was from online searches (20%).

Users of TAP and Sector Teams were the most likely to have had previous knowledge or experience of DIT or UKTI (both 13%). Users of ITAs were the most likely to say they received a direct call or email from someone at DIT (six per cent). Users of Missions were the most likely to say they heard about DIT at a UK trade fair (seven per cent).

There have been some changes since 2018/19:

- An increase in the proportion of ITA users that first heard about DIT through contacts in the public sector (up from 8% to 11%).
- An increase in the proportion of Missions users that first heard about DIT at a UK trade fair (up from 1% to 7%).
- A decrease in the proportion of users of OBNI that first heard about DIT from a direct call or email from DIT (down from 8% to 2%).
- A decrease in the proportion of users of OMIS that first heard about DIT from contacts in the public sector (down from 13% to 4%).
- An increase in the proportion of Webinars users that first heard about DIT through contacts in the private sector (up from 12% to 22%).
- A decrease in the proportion of users of Export Opportunities that first heard about DIT at a UK trade fair (down from 3% to 1%).

Table 5.2: How businesses first heard about DIT, by product or service

Non-Digital	TAP 18/19	TAP 19/20	Significant Change	ITAs 18/19	ITAs 19/20	Significant Change
Contacts in the private sector	30%	34%	-	19%	17%	↑
Contacts in the public sector	8%	8%	-	8%	11%	-
Searched online	2%	4%	-	9%	8%	-
Direct call from an international trade advisor	3%	2%	-	5%	5%	-
UK trade fair	5%	5%	-	3%	3%	-
Previous experience / knowledge / company use	12%	13%	-	8%	9%	-
Direct call/email from DIT	1%	3%	-	6%	6%	-
Unweighted base	369	179	-	2,001	2,402	-

Non-Digital	Missions 18/19	Missions 19/20	Significant Change	OBNI 18/19	OBNI 19/20	Significant Change
Contacts in the private sector	18%	22%	-	20%	19%	-
Contacts in the public sector	15%	10%	-	10%	11%	-
Searched online	7%	2%	-	16%	9%	-
Direct call from an international trade advisor	4%	4%	-	1%	3%	-
UK trade fair	1%	7%	↑	3%	4%	-
Previous experience / knowledge / company use	13%	10%	-	6%	9%	-
Direct call/email from DIT	7%	3%	-	8%	2%	↓
Unweighted base	167	189	-	154	198	-

Non-Digital	Posts 18/19	Posts 19/20	Significant Change	Sector Teams 18/19	Sector Teams 19/20	Significant Change
Contacts in the private sector	18%	18%	-	18%	20%	-
Contacts in the public sector	16%	14%	-	11%	13%	-
Searched online	6%	7%	-	4%	5%	-
Direct call from an international trade advisor	3%	4%	-	3%	4%	-
UK trade fair	4%	3%	-	6%	6%	-
Previous experience / knowledge / company use	11%	11%	-	14%	13%	-
Direct call/email from DIT	3%	4%	-	4%	3%	-
Unweighted base	748	765	-	522	308	-

Digital	Webinars 18/19	Webinars 19/20	Significant Change	Export Opportunities 18/19	Export Opportunities 19/20	Significant Change
Contacts in the private sector	12%	22%	↑	18%	16%	-
Contacts in the public sector	14%	10%	-	12%	8%	-
Searched online	10%	9%	-	16%	20%	-
Direct call from an international trade advisor	2%	3%	-	2%	3%	-
UK trade fair	1%	3%	-	3%	1%	↓
Previous experience / knowledge / company use	14%	12%	-	7%	7%	-
Direct call/email from DIT	8%	5%	-	5%	3%	-
Unweighted base	333	423	-	893	297	-

Source: Qcontdit - How did you first hear about DIT (or its predecessor, UKTI)?
Table includes answers given by at least 5% of users of any service
Note: an asterisk (*) denotes a value of less than 0.5 per cent.
Base: All respondents

5.3. Awareness of 'Exporting is GREAT' advertising campaign

Respondents were asked whether they recalled seeing any advertising from the 'Exporting is GREAT' campaign. For most services/products, the majority of businesses said that they recalled seeing advertising from the campaign, the one exception being users of TAP (45%). Users of Sector Teams (67%) and Export Opportunities (64%) were the most likely to say they recalled seeing any advertising from the campaign.

The one change since 2018/19 was a decrease among ITA users in the proportion that recalled seeing any advertising from the campaign (down from 61% to 56%).

Table 5.3: Whether businesses recalled seeing any advertising from the 'Exporting is GREAT' campaign

Non-Digital	TAP 18/19	TAP 19/20	Significant Change	ITAs 18/19	ITAs 19/20	Significant Change
Yes	47%	45%	-	61%	56%	↓
No	52%	53%	-	38%	42%	↑
Don't know	1%	2%	-	1%	2%	↑
Unweighted base	369	179	-	2001	2,402	-

Non-Digital	Missions 18/19	Missions 19/20	Significant Change	OBNI 18/19	OBNI 19/20	Significant Change
Yes	66%	61%	-	60%	57%	-
No	34%	37%	-	39%	41%	-
Don't know	0%	2%	-	1%	2%	-
Unweighted base	167	189	-	154	198	-

Non-Digital	Posts 18/19	Posts 19/20	Significant Change	Sector Teams 18/19	Sector Teams 19/20	Significant Change
Yes	62%	60%	-	67%	67%	-
No	37%	38%	-	31%	31%	-
Don't know	1%	2%	-	2%	1%	-
Unweighted base	748	765	-	522	308	-

Digital	Webinars 18/19	Webinars 19/20	Significant Change	Export Opportunities 18/19	Export Opportuni ties 19/20	Significant Change
Yes	56%	59%	-	63%	64%	-
No	42%	38%	-	36%	33%	-
Don't know	3%	3%	-	1%	3%	-
Unweighted base	333	423	-	893	297	-

Source: 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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