Analysis

Department for International Trade

Export Client Quality Survey for Businesses Supported April 2018 to March 2019

Publication date July 2020
Updated August 2020

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

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

Research contractor: Kantar's Public Division, London UK

Research Authors: Karen Bunt, Stephen McGinigal, Emily Edwards-Hughes, Simon Edscer, George Spedding.

Acknowledgements:

The team at Kantar would like to thank Natalia Chivite-Matthews, Geraldine Brown, Pablo Telford, Nadia Wright, and Gemma Pilling from the Department for International Trade for their invaluable inputs during the project. Errors and omissions remain the responsibility of the authors alone.

Kantar's Public Division is part of Kantar UK Ltd.

www.kantar.com

Contents

Corrections

Chart 1.3.1
Figures in this chart have been corrected to better reflect all records provided by DIT and following a correction to the methodology used to calculate the total number of companies eligible for the survey. The previous methodology counted the number of companies eligible each month and then summed these to provide a total. This meant that companies eligible in April could be counted again in a subsequent month. This has been corrected to instead count the number of companies eligible throughout the entire year. This update resulted in a large decrease to the figure. This change is also reflected in the main body of text at the start of section 1.3.

Chart 1.3.2
Figures updated to remove duplicates.

Table 1.3.1
See note for chart 1.3.2.

Table 1.3.2
Total column updated to reflect changes described for chart 1.3.1.

Chart 3.1.1
Updated EU and non-EU figures in the chart to match those found in the table.

Chart 3.1.8 – 3.10.8
"Identified new export opportunities or made new contacts" was mistakenly reported as ""Identified new export opportunities or made new contracts". This has been corrected in all relevant charts and text.

Table 4.1
Sector Team satisfaction figures updated to match the correct figures reported in the Sector Team summary page.

Table 4.3
Sector Team NPS figures updated to match the correct figures reported in the Sector Team summary page.

Table 4.5
Sector Team figures updated to match the correct figures reported in chart 3.7.5.

Chart 6.1.1
The title of this chart has been corrected.

Table 6.8.3
Corrected a typo in the proportion of responses who reported that they 'don't know'.

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.

Since its creation in July 2016 DIT has been tasked with:

- Supporting and encouraging UK businesses to drive sustainable international growth by:
  - Encouraging and inspiring UK businesses to sell overseas
  - Supporting UK businesses to access advice, practical assistance and the trade finance they need to export from the private or public sector
  - Connecting UK businesses with overseas buyers, international markets and peer-to-peer support.
- Opening markets, building a trade framework with new and existing partners which is free and fair.

Until 2017, the Performance & Impact Monitoring Survey (PIMS) was used to collect data regarding the quality and impact of DIT's **exporting** services. PIMS was also used to estimate two key performance indicators (KPIs): (i) the number of service deliveries provided, and (ii) the number of unique businesses supported by DIT.

A review of PIMS[1] by DIT identified several challenges and areas of improvement for the study. DIT commissioned Kantar Public and Frontier Economics to design and conduct a new study to examine the quality and impact of its export services: The Export Client Survey (ECS). The main aims of the 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 will be 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 2018 and March 2019. There is a separate report based on Quality Survey interviews with businesses who used DIT services between October 2017 and March 2018.

[1] PIMS Review, Insight and Performance Team ITI November 2016

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:

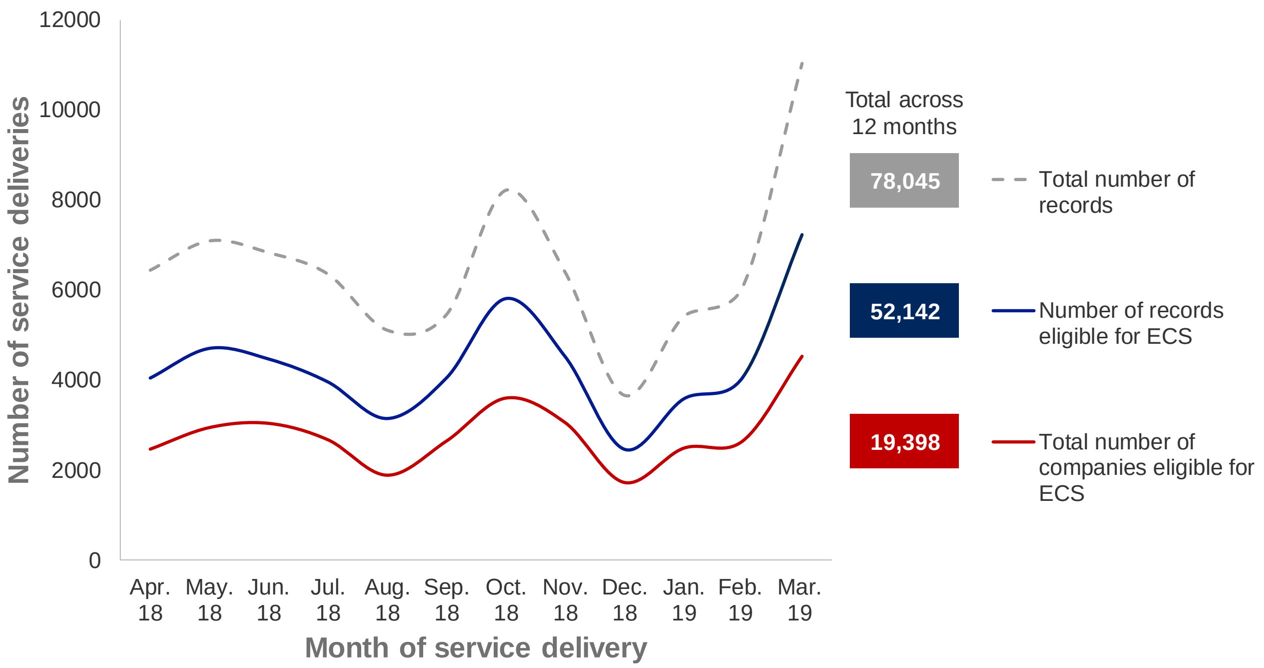
Bespoke offers and face to face support
Tradeshow Access Program (TAP)
International Trade Advisers (ITAs)
Missions
Overseas Business Network Initiative (OBNI)
Overseas Market Introduction Service (OMIS) (great.gov.uk)
Posts
Sector Teams
Universal Offer Digital and Events
Webinars
Export Opportunities
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, the Selling Online Overseas (SOO) service has not been provided with a product findings chapter in this report.

1.3 Overview of number of services delivered and businesses supported

In total we received almost 80,000 records, covering just over 55,000 service deliveries related to the services covered by the ECS for services delivered between April 2018 and March 2019. From these records, almost 20,000 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 2018 - March 2019)



The most frequently used services were Export Opportunities (c.15,000 records across just over 4,000 businesses) and ITAs (c.14,000 records across c. 8,000 businesses).

Chart 1.3.2 Service delivery records received from DIT (April 2018 - March 2019)

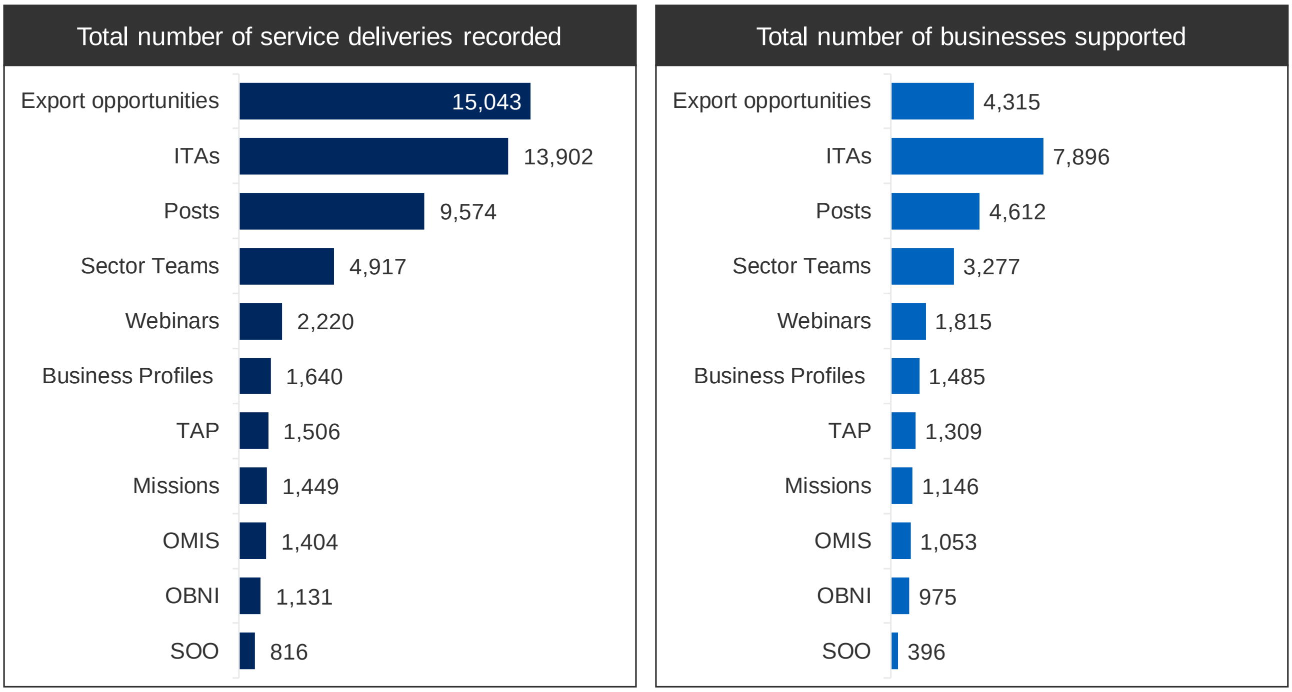


Table 1.3.1: Service delivery records received from DIT[2]

Month of service delivery	Apr. 18	May. 18	Jun. 18	Jul. 18	Aug. 18	Sep. 18	Oct. 18	Nov. 18	Dec. 18	Jan. 19	Feb. 19	Mar. 19	Total
Total number of records	6,439	7,090	6,828	6,350	5,105	5,454	8,214	6,396	3,659	5,405	6,073	11,032	78,045
Service deliveries eligible for ECS	4,054	4,714	4,476	3,965	3,153	4,057	5,821	4,533	2,469	3,587	4,070	7,243	57,280
Services													
TAP	0	120	145	85	45	115	165	285	10	220	100	215	1,506
ITA	965	1,310	1,105	1,145	770	1,295	1,610	1,210	625	1,105	1,250	1,515	13,902
Missions	35	35	65	35	<10	165	280	90	170	185	115	260	1,449
OBNI	120	160	105	185	30	40	275	55	35	<10	120	<10	1,131
OMIS	135	85	130	60	80	155	185	130	85	130	90	140	1,404
Posts	525	535	465	550	475	705	1,225	990	665	640	1,330	1,475	9,574
Sector Teams	70	340	455	400	50	285	780	170	275	160	200	1,730	4,917
Webinars	40	40	85	195	60	0	90	340	95	340	250	685	2,220
Export opportunities	1,910	1,935	1,650	1,170	1,430	1,300	1,195	1,175	565	880	645	1,190	15,043
Business Profiles	175	115	285	115	165	140	230	135	100	10	0	165	1,640
SOO	110	70	45	55	45	25	80	45	20	100	90	130	816

[2] 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[3]

Month of service delivery	Apr. 18	May. 18	Jun. 18	Jul. 18	Aug. 18	Sep. 18	Oct. 18	Nov. 18	Dec. 18	Jan. 19	Feb. 19	Mar. 19	Total across 12 months[4]
Total number of companies supported	2,463	2,943	3,036	2,670	1,884	2,644	3,597	3,054	1,723	2,483	2,645	4,525	**19,398**
Services													
TAP	0	115	145	85	40	115	155	285	10	215	100	210	1,309
ITAs	855	1,085	945	940	640	1,075	1,320	995	490	875	1,000	1,255	7,896
Missions	30	35	65	35	<10	160	250	80	120	165	105	215	1,146
OBNI	120	135	105	180	25	40	240	55	30	<10	115	<10	975
OMIS	110	75	115	55	75	150	170	130	80	120	85	130	1,053
Posts	410	445	385	415	400	560	825	695	510	500	825	1,000	4,612
Sector teams	70	320	405	350	50	245	640	115	240	130	180	1,100	3,277
Webinars	40	40	80	135	55	0	90	315	95	310	225	560	1,815
Export opportunities	920	930	880	660	645	640	625	665	315	485	360	505	4,315
Business Profiles	155	115	285	115	160	130	140	130	100	10	0	165	1,485
SOO	55	35	30	30	20	<10	30	30	10	55	50	70	396

[3] For individual services, the monthly figures have been rounded to the nearest five given low counts in certain cells.
[4] 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 2018 are included within the July 2018 sample, interactions in May 2018 are included within the August 2018 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 a combination of rounding to the nearest whole number and 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, 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 2018 (interviewing businesses who received support from DIT in April 2018. This report covers DIT services delivered between April 2018 and March 2019, although the majority of the report only focuses on the services listed in section 1.2. The average interview length was around 20 minutes.

2.4 Response rates

Table 2.4.1 below shows response rates achieved for interviewing between July 2018 and June 2019 for businesses with interactions between April 2018 and March 2019[5].

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 47% response rate for interviews conducted between July 2018 and June 2019[7].

Table 2.4.1 Fieldwork outcomes July 2018 to June 2019

Fieldwork outcomes	
	Number of cases *(N)*
Number of cases issued	16,120
Live sample – eligible but not interviewed	4,188
Deadwood (e.g. uncontactable phone numbers)	1,672
Refusal	3,625
Ineligible	969
Complete interview	5,666
Response rate	47%

[5] This does not include the businesses that were contacted between July 2018 and June 2019 that had interactions before April 2018. These are included in the report for businesses that had interactions with DIT between October 2017 and March 2018.

[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 for each DIT service July 2018 to June 2019

	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector teams	Webinars	Export Opportunities	Business Profiles	SOO
Number of cases issued	813	4,897	502	468	397	2,368	2,188	1,326	2,365	665	131
Live sample - no interview	195	1,161	127	103	100	635	6670	374	668	100	58
Deadwood	59	486	69	56	63	313	242	96	179	98	11
Refusal	173	1,080	118	124	74	524	525	278	486	224	19
Ineligible	17	169	21	31	19	149	211	120	139	85	8
Complete	369	2,001	167	154	141	747	543	458	893	158	35
Response rate	53%	50%	44%	46%	49%	44%	40%	47%	48%	43%	38%

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

Table 2.4.3 Levels of deadwood for each DIT service

Export Client Survey services	Deadwood %
TAP	7%
ITAs	10%
Missions	14%
OBNI	12%
OMIS	16%
Posts	13%
Sector teams	11%
Webinars	7%
Export Opportunities	8%
Business Profiles	15%
SOO	8%

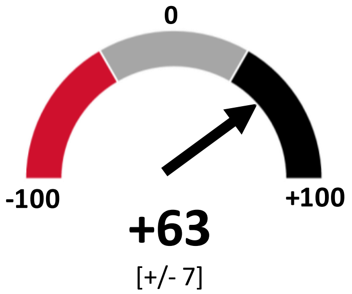
3. Product Findings

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:

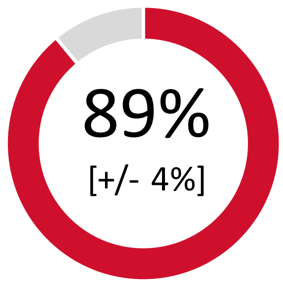
- **Net promoter score (NPS):** a summary of how likely it is that businesses would recommend using the service or product. Businesses were asked to provide a score between zero and ten, with ten being the most positive response. Scores of nine and ten were banded together as ‘promoters’ and scores of 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’.

Summary page – TAP

Net Promoter Score

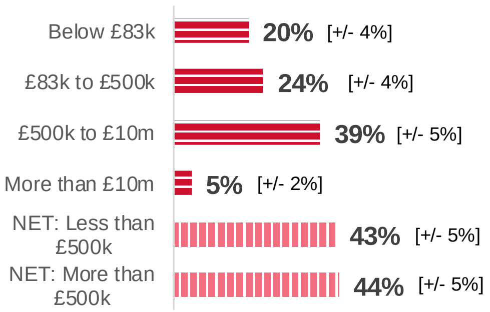


Satisfaction with service

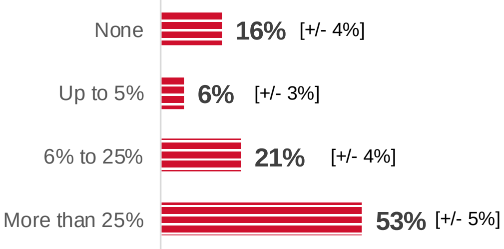


Turnover

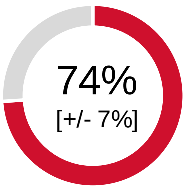
Turnover



% of turnover from exporting

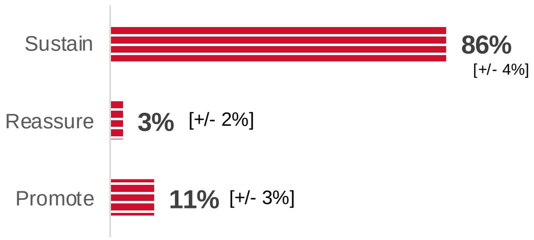


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

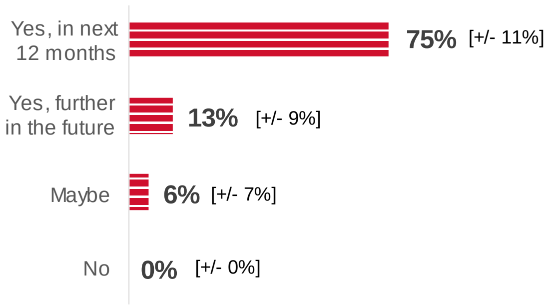


Sustain = current exporters

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)

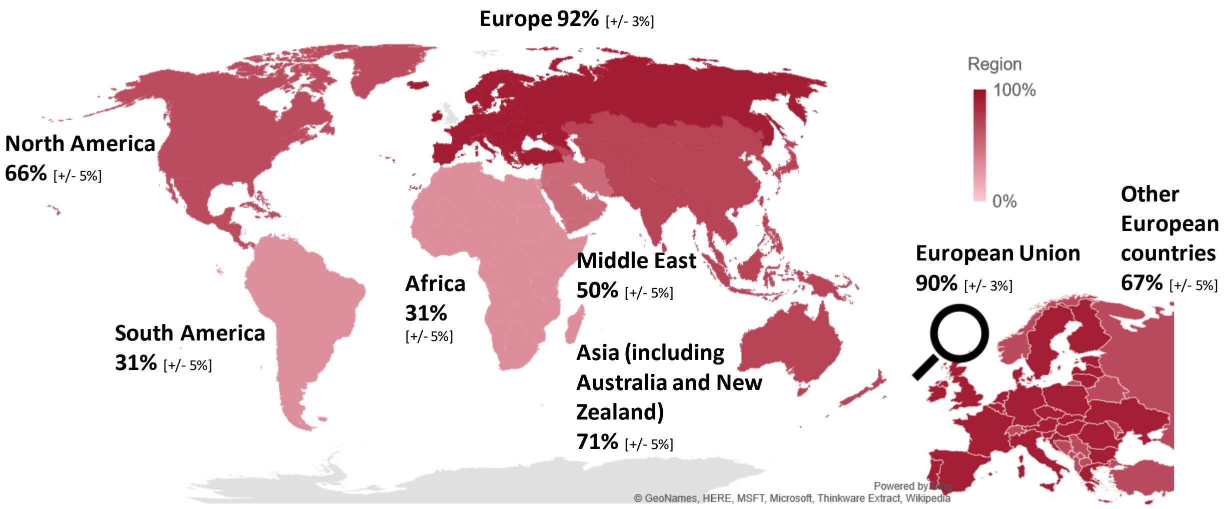
The Tradeshow Access Programme (TAP) provides subsidised opportunities for UK firms to exhibit at international trade fairs. Each year DIT, with the relevant TAP trade challenge partners, agrees which overseas trade shows they will support UK businesses to attend via grants. Businesses take part as a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

These findings are based on interviews with 369 businesses who used a TAP in April 2018 to March 2019. Eight in ten (78%) sold goods overseas and a third (34%) services (65% only sold goods, 21% only sold services and 13% both).

3.1.1 TAP: Business export status

Around nine in ten businesses (86%) currently export by selling goods or services or have done previously. Of these, nine in ten (90%) sold within the European Union and two in three (67%) sold within the rest of Europe. Around two-thirds sold in Asia (71%) and North America (66%), half (50%) sold in the Middle East and three in ten sold in Africa and South America (both 31%).

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



Europe	92% [+/- 3%]
Asia (including Australia and New Zealand)	71% [+/- 5%]
North America	66% [+/- 5%]
Middle East	50% [+/- 5%]
Africa	31% [+/- 5%]
South America	31% [+/- 5%]

European Union	90% [+/- 3%]
Other European countries	67% [+/- 5%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used[1] TAP and who have exported (330)

3.1.2 Service performance: Tradeshow Access Programme (TAP)

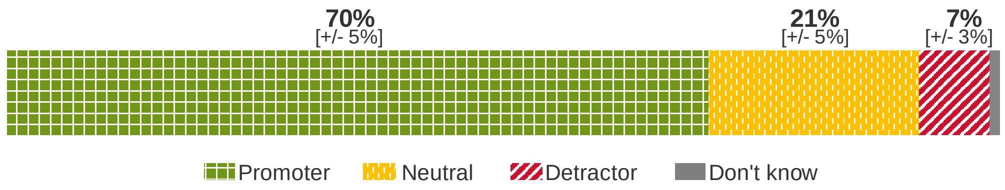
This section examines the performance of the service provided by the Tradeshow Access Programme (TAP). It covers businesses' overall perceptions of the service that they used, their views on specific aspects of advice and support, and actions they took as a result of the service interaction.

Overall perceptions of service

Businesses were asked, based on their experiences of 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)

Seven in ten businesses (70%) were 'Promoters' of TAP (score of nine or ten), while seven per cent were 'Detractors' (score of zero to six) and one in five (21%) were neutral (score of seven or eight); Chart 3.1.2 provides details. Overall, TAP had a positive NPS of +63. 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 (369)

Businesses were asked about ways the service they used **could be improved**. Issues related to costs or funding (24%) were the most frequently cited, including 14% who requested increased funding or financial assistance. There were also comments regarding service (12%), such as better promotion of services; information (12%), such as better or more information; improved communication (ten per cent); events (nine per cent), such as more events or the option of attending events more than once; and support (seven per cent), specifically more support or more specialist support.

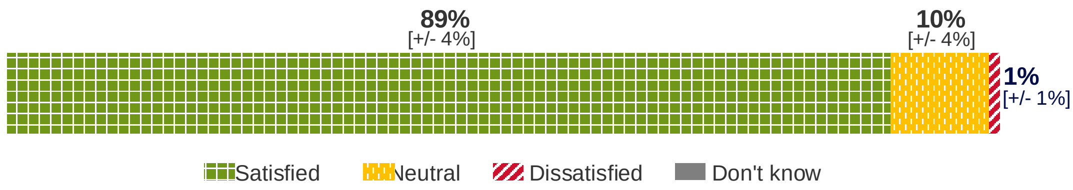
Businesses were asked to think of their overall experience of the service and say **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[8].

Overall, nine in ten (89%) were satisfied with their experience of TAP (rating of seven or more out of ten), and this included over a third (36%) who gave a 'very satisfied' rating (ten out of ten). One per cent of businesses were dissatisfied (rating of three or below), while ten per cent gave a neutral rating (between four and six). There were no noticeable differences by business type.

---

[8] 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 (366)

Perceptions of advice and support

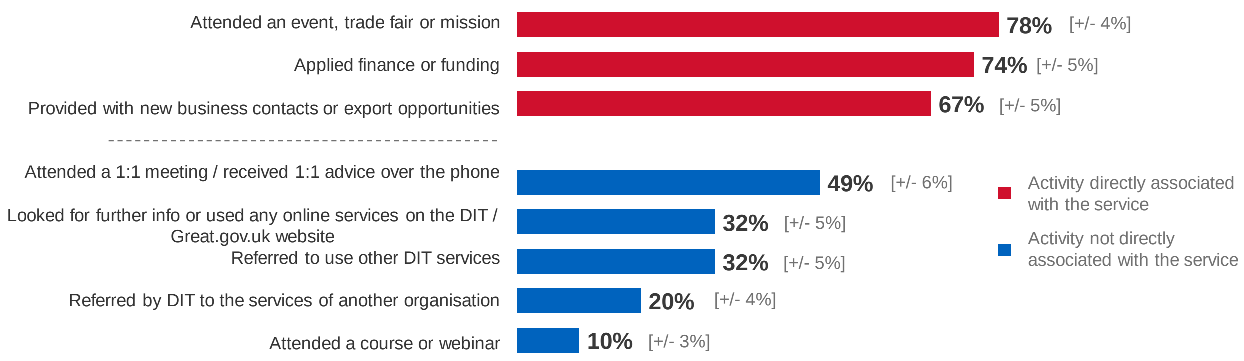
Businesses were asked to rate the advice and support they received from TAP.

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)[9], as well as other activities that businesses may have experienced.

At least two-thirds of businesses that attended an event, trade fair or mission (78%), applied for finance or funding (74%) or were provided with new business contacts or export opportunities (67%).

In addition, half of businesses (49%) 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 (32%) or were referred to other DIT services (32%). One in five (20%) said they were referred to the services of another organisation. There were no noticeable differences by business type.

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 (369)

---

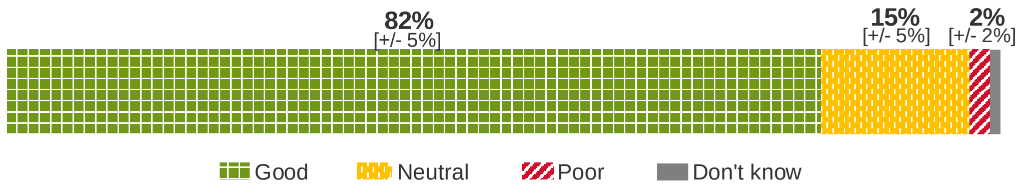
[9] The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

When asked which **specific types of support** they received as part of TAP, 15% said they received market information about competition specific to their products or services, 13% 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, more than four in five businesses (82%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while 15% were neutral (score of four to six) and two per cent said it was poor (rating of zero to three). 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 (362)

Businesses were asked to **rate their experience on a number of criteria**. Findings are shown in Table 3.1.1 and Chart 3.1.6 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six are labelled as neutral, and zero to three 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 the organisation of the service (89% rated this as good), the registration process (88% rated this as 'straightforward'), staff knowledge (85% rated staff as 'knowledgeable'), and the steps they needed to take when using the service (85% agreed that the service made these steps clear).

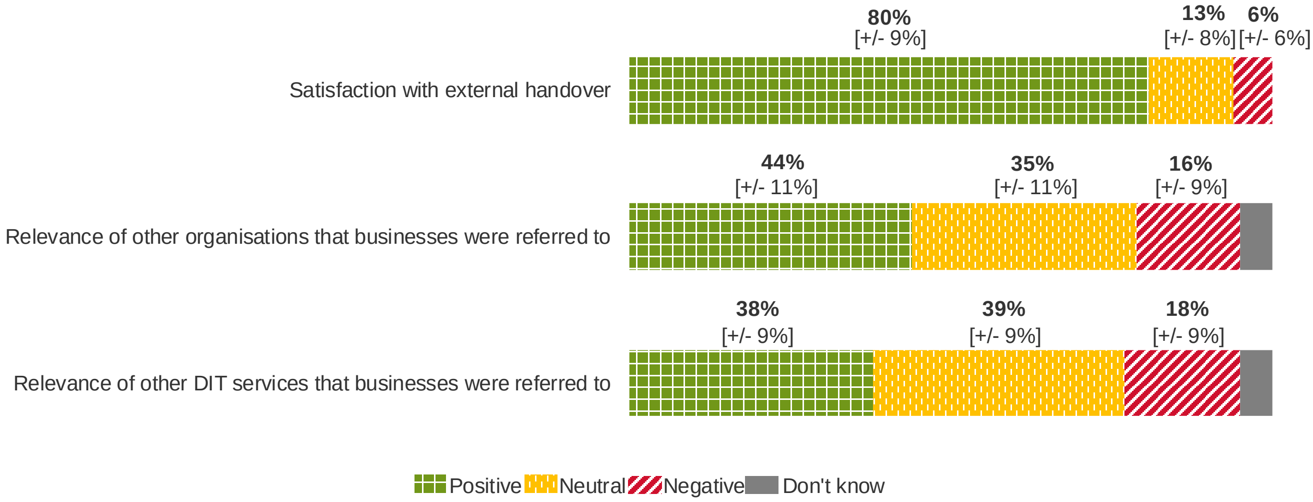
Businesses were least likely to give positive ratings for the relevance of services they were referred to – either other DIT services (38%) or those provided by other organisations (44%). Please note that the items in Chart 3.1.6 have a low base size, so results should be treated with caution. There were no noticeable differences by business type.

Table 3.1.1 Rating by businesses of the specific advice and support they received - TAP

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
Rating of organisation of the service	**89%** [+/- 3%]	**8%** [+/- 3%]	**2%** [+/- 2%]
How straight forward was the registration for the service	**88%** [+/- 4%]	**7%** [+/- 3%]	**4%** [+/- 2%]
Rating of staff knowledge	**85%** [+/- 4%]	**12%** [+/- 3%]	**3%** [+/- 3%]
How clear were the steps they needed to take when using the service	**85%** [+/- 4%]	**13%** [+/- 4%]	**2%** [+/- 2%]
Amount of time take to receive information	**82%** [+/- 4%]	**15%** [+/- 4%]	**2%** [+/- 1%]
How comprehensive was the information that they received	**75%** [+/- 5%]	**19%** [+/- 5%]	**3%** [+/- 2%]
Quality of contacts they were provided with	**74%** [+/- 5%]	**19%** [+/- 5%]	**6%** [+/- 3%]
How clear were the steps they needed to take after using the service	**65%** [+/- 5%]	**24%** [+/- 5%]	**7%** [+/- 3%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (349). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (352). Qclarity_1 - The service made clear the steps I needed to take when I was using it (358). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (349). Qclarity_2 - The service made clear what I should do next after using it (353). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (339). Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (366). Qevent - How would you rate the organisation of the [SAMPLED SERVICE]? (366). Base: All respondents that used the TAP service, except those giving a ‘not applicable’ answer

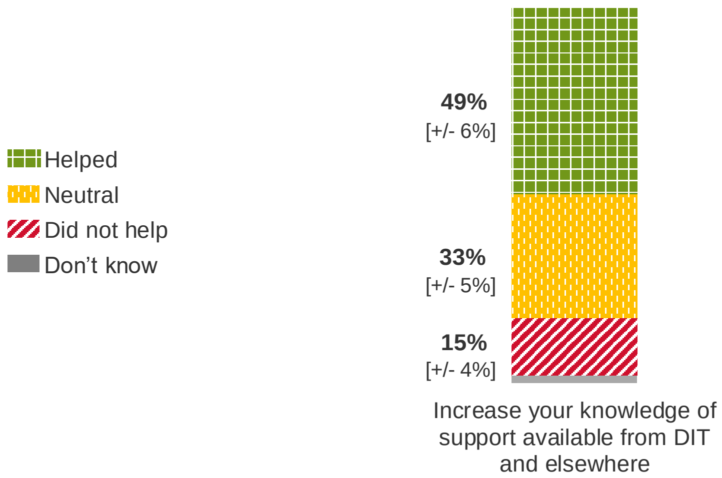
Chart 3.1.6 Rating by businesses of the handover and referrals they received – TAP*



Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (76*) 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 (120). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (79*) Base: All respondents that used the TAP service, except those giving a 'not applicable' answer
*Low base size, please treat results with caution

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 (49%) 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 15% said the service did not help them in this way. There were no noticeable differences by business type.

Chart 3.1.7 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 (369)

Actions taken as a result of service interaction

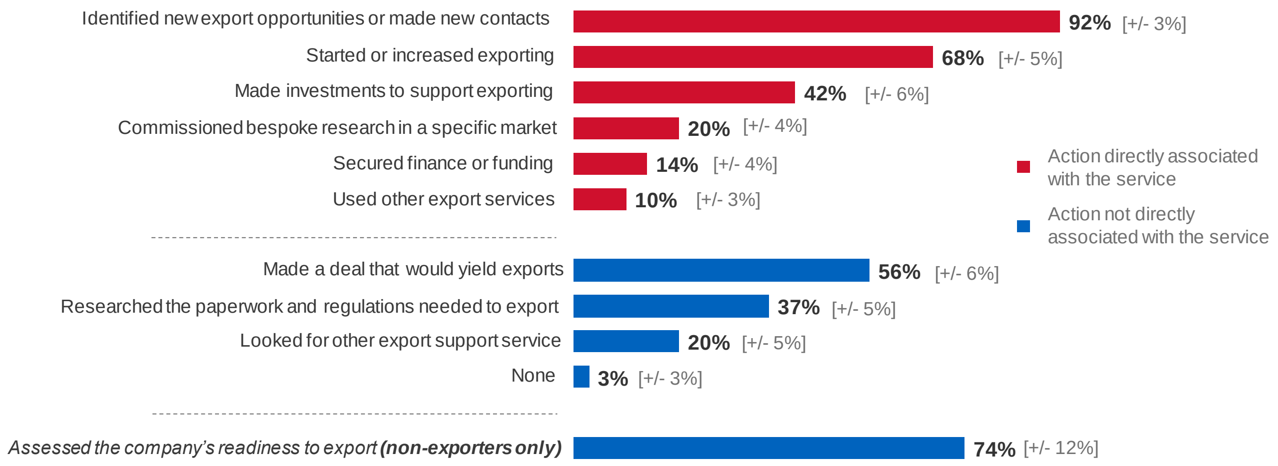
A series of questions explored what actions businesses report having taken as a result of their interaction with TAP. It then looks specifically at where they found any additional support and the types of investment they had made as a result of using the service.

Businesses carried out a **range of actions as a result of using TAP**. Chart 3.1.8 shows the actions that are most relevant to TAP (above the dotted line)[10], 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 (92%), started to import or increased exports (68%) or made investments to support exporting (42%).

Other actions (less specific to TAP) include assessing the company's readiness to export, which 74% of businesses who were not exporting at the time of the service had done. Over half of all businesses had made a deal that would yield exports (56%) and over a third had researched the paperwork and regulations needed to export (37%).

Chart 3.1.8 Actions taken as a result of service interaction – TAP



Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used the TAP service (369). Non-exporters (57)

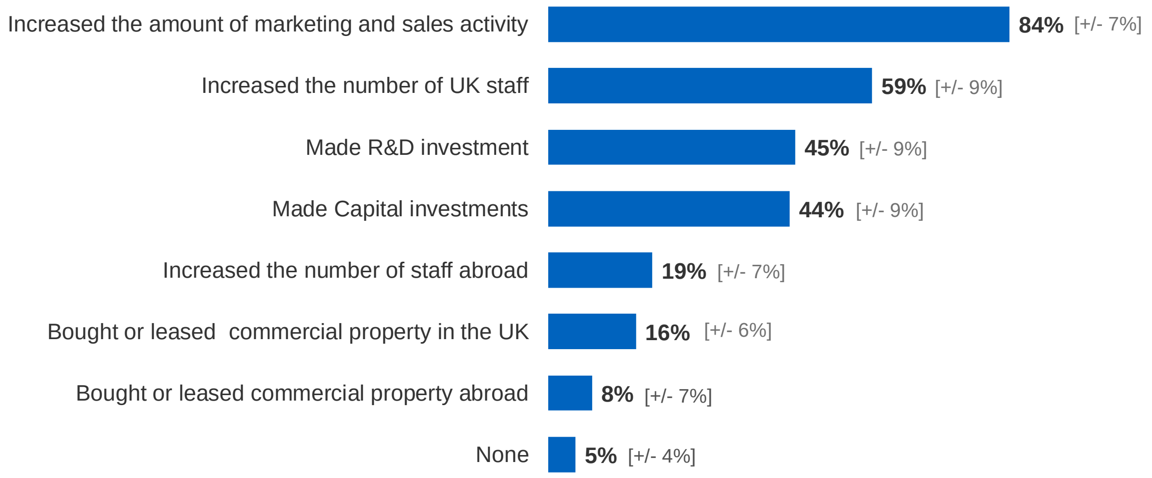
Businesses that had never exported were more likely to have researched the paperwork and regulations needed to export (62%) and assessed their companies readiness to export (76%).

Businesses that reported having made investments to support exporting as a result of using TAP (151 businesses) were asked to specify the **type of investment** they had made. They were most likely to have increased their marketing and sales activity (84%), while more than half increased the number of UK staff (59%); see Chart 3.1.9. There were no noticeable differences by business type.

---

10 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 Type of investments made as a result of DIT service - TAP

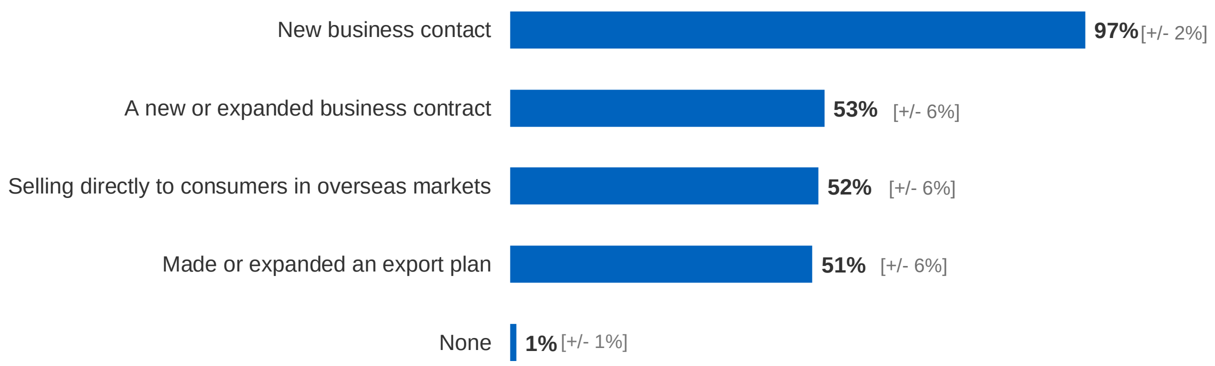


Qresult_invest - Which of the following investments has your business made to support new or increased export opportunities? IF NECESSARY: Please only think about investments relating to export activity. Table is restricted to answers given by more than 1% of respondents. Base: All respondents who had used the TAP service and had made investments to support exporting (151)

Businesses that had identified, or been provided with, new business contacts or export opportunities as part of the service from TAP 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 (97%), while the other main opportunities were making a new or expanded business contract (53%), selling directly to consumers in overseas markets (52%) and making or expanding an export plan (51%).

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 1% of respondents. Base: All respondents that used the TAP service who had identified a new business contact as part of the DIT service (356)

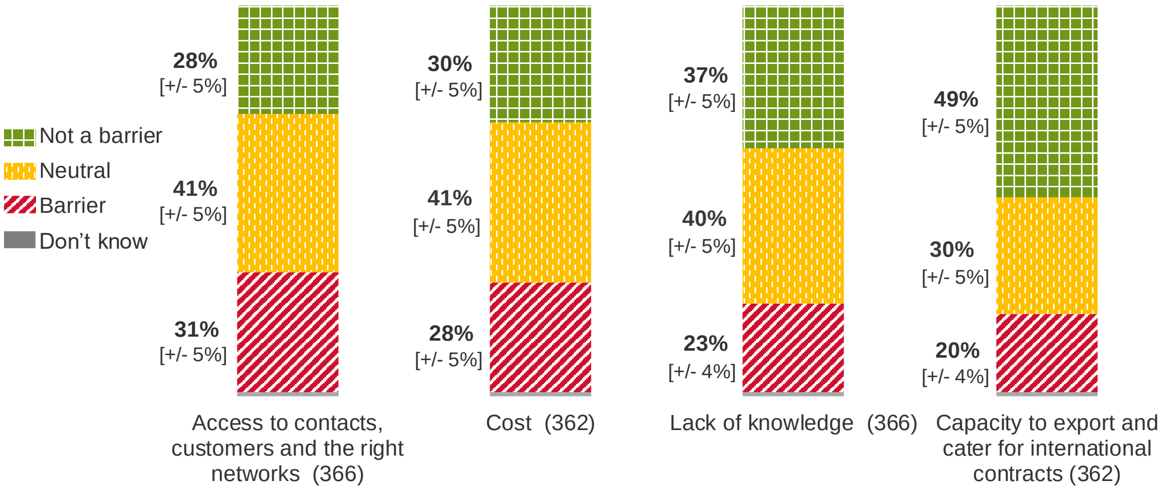
Businesses that sold goods or services overseas online were more likely to sell directly to consumers in overseas markets (74%) and have identified a new or expanded business contract (68%).

Businesses that had identified a new business contact as part of the TAP service (343 respondents) were read a list of possible **types of contact** and asked which ones they had made. Almost three-quarters of the businesses that had identified a new contact said they had made contact with a buyer (71%), while more than half had contacted a distributor (56%).

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 contracts, customers and the right networks was seen as a barrier by almost a third of businesses (31%), while cost was said to be a barrier by 28% of businesses. Around a quarter (23%) said that lack of knowledge was a barrier, while 20% 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

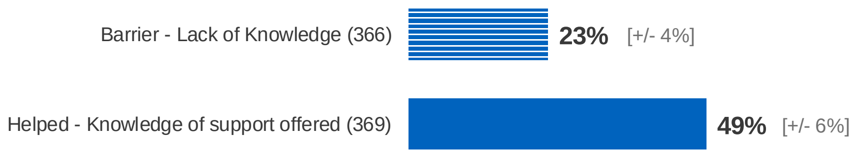


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used the TAP service, except those giving a 'not applicable' answer

Chart 3.1.12 compares responses to questions on the barriers to exporting (as shown 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.

A quarter (23%) said that lack of knowledge was a barrier to exporting, while twice as many (49%) said that TAP helped them increase their knowledge of support available.

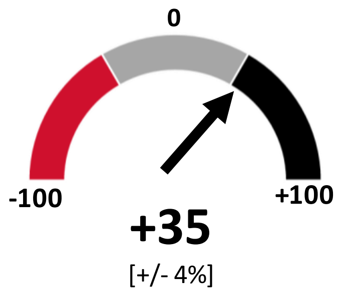
Chart 3.1.12 Barriers to exporting and how DIT helped – TAP



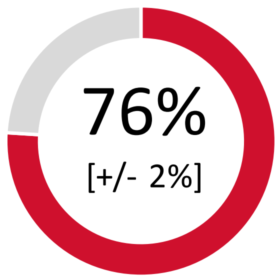
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used the TAP service, except those giving a 'not applicable' answer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

Summary page – ITAs

Net Promoter Score

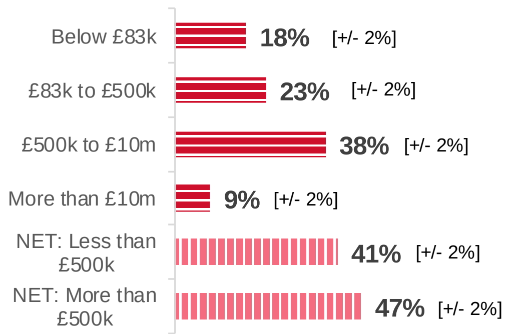


Satisfaction with service

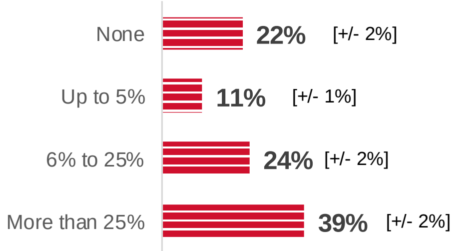


Turnover

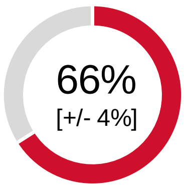
Turnover



% of turnover from exporting

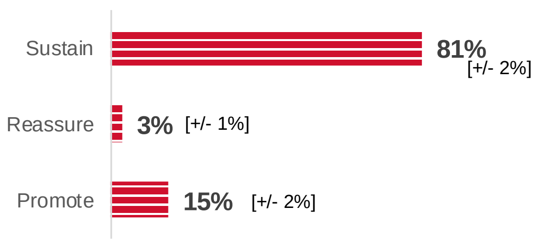


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

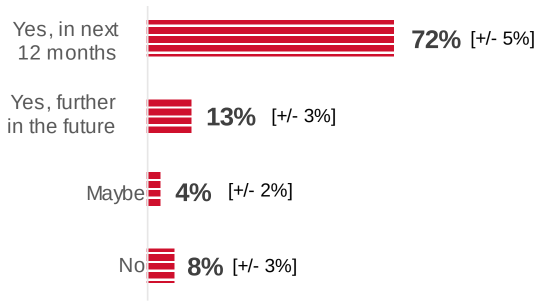


Sustain = current exporters

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)

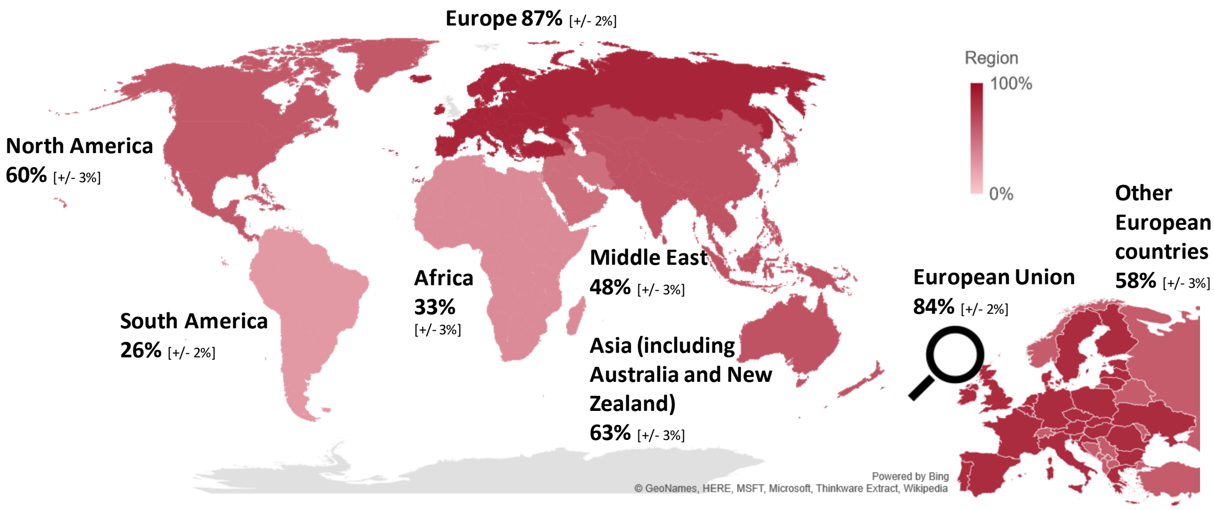
International Trade Advisors (ITAs) provide businesses with impartial face-to-face advice, to help them to identify the services and support they need to grow internationally. ITAs offer a broad range of services, including tailored advice, training opportunities and structured programmes. They can also 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 2,001 businesses who used an ITA in April 2018 to March 2019. More than seven in ten (73%) sold goods overseas and four in ten (41%) services (59% only sold goods, 26% only sold services and 14% both).

3.2.1 ITAs: Business export status

Eighty-one per cent of businesses currently export by selling goods or services or have done so previously. Of these, more than eight in ten businesses (84%) exported within the European Union and over half (58%) sold within the rest of Europe. Around six in ten sold goods or services in Asia (63%) or North America (60%), and half sold within the Middle East (48%). The least common areas were Africa (33%) and South America (26%).

Chart 3.2.1 Regions organisations exports to or exported to previously – ITAs



Europe	87% [+/- 2%]
Asia (including Australia and New Zealand)	63% [+/- 3%]
North America	60% [+/- 3%]
Middle East	48% [+/- 3%]
Africa	33% [+/- 3%]
South America	26% [+/- 2%]

European Union	84% [+/- 2%]
Other European countries	58% [+/- 3%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used ITAs and who have exported (1683)

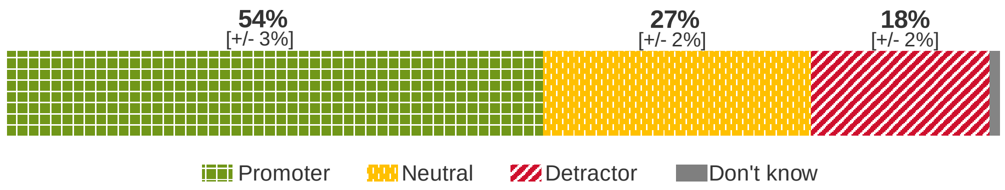
3.2.2 Service performance: ITAs

This 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 the 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) known as Net Promoter Score (NPS). More than half (54%) were 'Promoters' of ITAs (score of nine or ten), while one in six (18%) 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 +35.

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 (2001)

The table below shows a breakdown of the Net Promoter Score for each ITA region.

Table 3.2.1: NPS by ITA region

Likelihood of recommending service (NPS) by ITA region		
	NPS	**CI (+/-)**
North East	38	19
North West	27	9
Yorkshire	44	14
East Midlands	32	22
West Midlands	33	16
East England	29	12
London	39	10
South East	39	8
South West	41	16

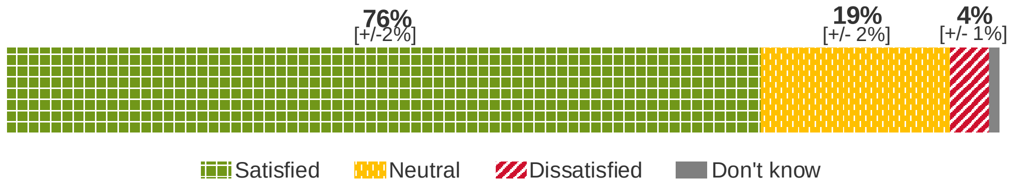
The likelihood of recommending the service was consistent across different types of business. The one difference was that businesses that only sold services overseas were less likely to be promoters than those who sold goods (48% compared with 55%).

Businesses were asked about ways the service they used **could be improved**. Businesses raised a range of issues, including information (14%), for example better or more information; more or specialist support (14%); communication (14%), including more feedback or follow-up; staff (13%), including requests for more knowledgeable staff and a better understanding of their market or the current climate; and better service (13%).

Businesses were asked **how satisfied they were**, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[11].

Three in four businesses (76%) were satisfied with their experience of ITAs (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). Four per cent of businesses were dissatisfied (rating of three or below), while 19% gave a neutral rating (between four and six).

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 (1982)

The table below shows satisfaction with service by ITA region.

Table 3.2.2: Satisfaction with service by ITA region

Satisfaction with service by ITA region		
	Satisfied	**CI (+/-)**
North East	80%	10%
North West	73%	6%
Yorkshire	81%	8%
East Midlands	76%	10%
West Midlands	79%	9%
East England	78%	6%
South West	79%	9%
South East	76%	5%
London	74%	5%

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

Of the 88 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 (36 respondents). Another main reason for dissatisfaction was that they did not get enough information or advice (32

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

respondents), while there were also comments about insufficient contact (17 respondents) and the fact that the advice was more relevant to other types of businesses (14 respondents). Respondents answered this question in their own words, and interviewers then coded their responses against a pre-defined list of options. As this question has a low base size, results should be treated with caution.

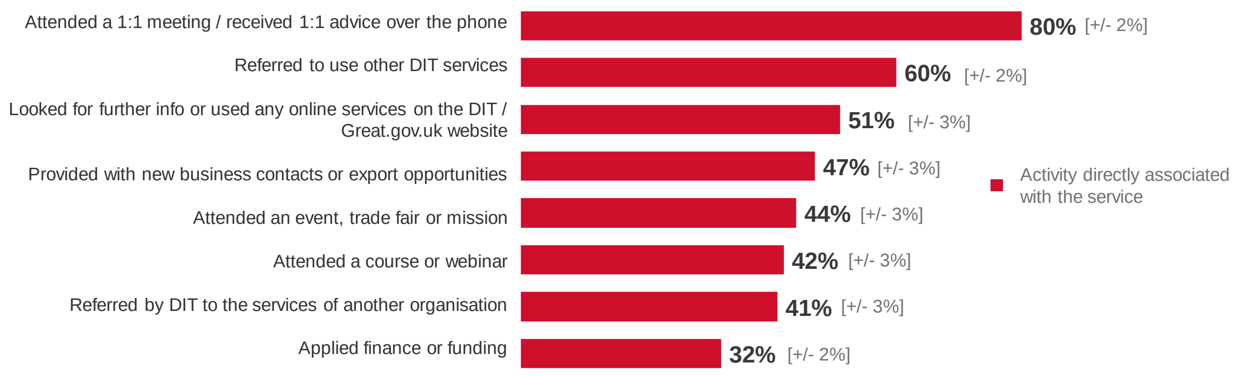
Perceptions of advice and support

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)[12], 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 (80%), while three in five (60%) were referred to other DIT services, and half (51%) 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%).

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 (2001)

When asked which **specific types of support** they received as part of ITAs, 28% said they received an off-the-shelf overview for existing markets and sectors, 24% received tailored 'route to market' information, 15% received market information about competition specific to their products or services, and ten per cent had an analysis of their suppliers and value chain.

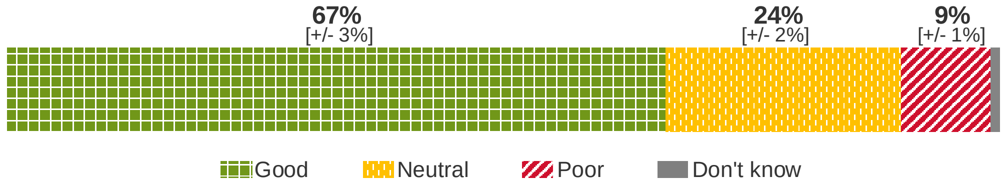
Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

As shown in Chart 3.2.5, two-thirds (67%) 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

[12] 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.

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 (1942)

Businesses were also asked to **rate their experience on a number of criteria**. Findings are shown in Table 3.2.3 and Chart 3.2.6 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 (84% rated staff as 'knowledgeable'), the time taken to receive information or support (80% rated this as 'acceptable') and external handovers (76% were satisfied). Businesses were less likely to give positive ratings for the relevance of services they were referred to – either other DIT services (58%) or other organisations (61%). Negative ratings were given by no more than one in ten respondents on each measure.

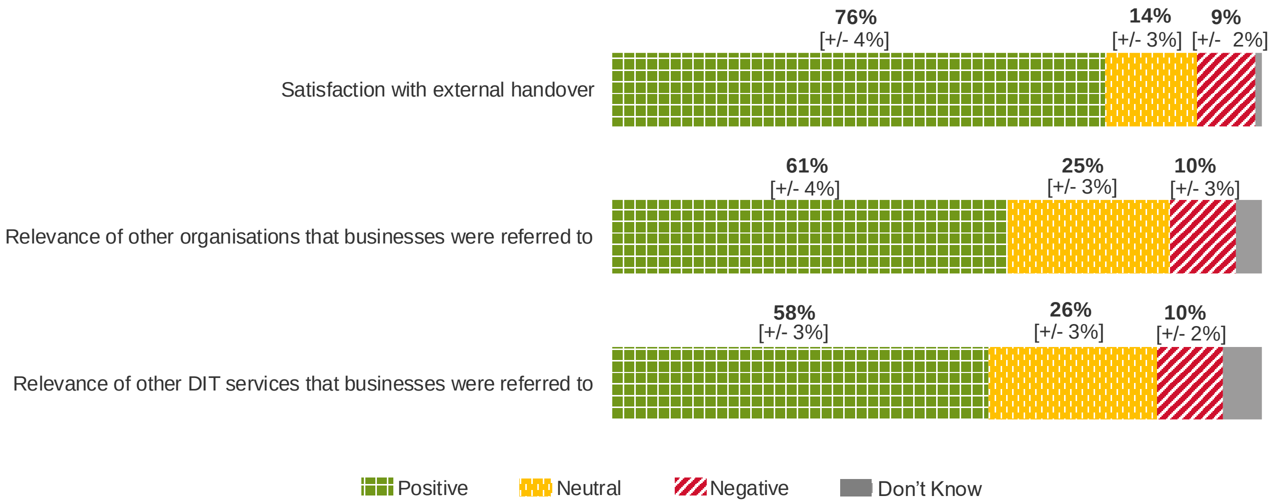
Table 3.2.3 Rating by businesses of the specific advice and support they received – ITAs

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
Rating of staff knowledge	**84%** [+/- 2%]	**12%** [+/- 2%]	**3%** [+/- 1%]
Amount of time take to receive information	**80%** [+/- 2%]	**14%** [+/- 2%]	**5%** [+/- 1%]
How comprehensive was the information that they received	**73%** [+/- 2%]	**21%** [+/- 2%]	**5%** [+/- 1%]
How clear were the steps they needed to take when using the service	**73%** [+/- 2%]	**20%** [+/-2%]	**6%** [+/- 1%]
Quality of contacts they were provided with	**70%** [+/- 3%]	**21%** [+/- 2%]	**8%** [+/- 2%]
How clear were the steps they needed to take after using the service	**65%** [+/- 3%]	**24%** [+/- 2%]	**9%** [+/- 2%]

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

Businesses that had used DIT services for more than five years were less likely to be positive about the comprehensiveness of the information that they received (67% good) and the clarity of steps the businesses needed to take when using the service (67% agree). Businesses that had used DIT services for more than five years were also more negative about the how clear the steps were that they needed to take after using the service (13% disagree).

Chart 3.2.6 Rating by businesses of the handover and referrals they received - ITAs



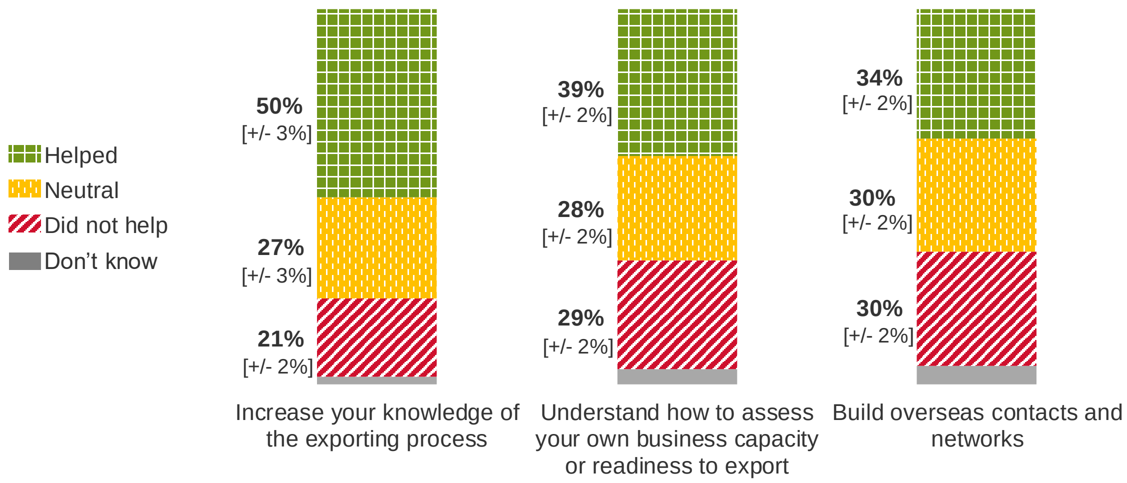
Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (832) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (1198). Qrelorg - And using the same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

Businesses that export online were more likely than businesses that do not to say that the other DIT services that they were referred to were not relevant (13% compared with eight per cent).

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 3.2.7 shows the items that were asked of businesses that used ITAs. This shows that:

- Half (50%) of businesses that had used ITAs said that the service helped them by increasing their knowledge of the exporting process, while a fifth (21%) said the service did not help them in this way.
- Two in five users of ITAs (39%) said that the service had helped them to understand how to assess their own business capacity or readiness to export, while three in ten (29%) 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 30% said the service did not help them to do this.

Chart 3.2.7 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 (2001)

Micro businesses (with between zero and nine employees) were more likely to say that the service helped them to increase their knowledge of the exporting process (52%). Businesses with a turnover of below £500,000 were also more likely to say that the service increased their knowledge of the exporting process (55% compared with 45% of businesses with a turnover of £500,000 or more). Businesses with a turnover of below £500,000 were also more likely to say that the service helped them to understand how to assess their capacity or readiness to export (44% compared with 35% of businesses with a turnover of £500,000 or more), as were businesses who export online (42% compared with 34% who do not).

Actions taken as a result of service interaction

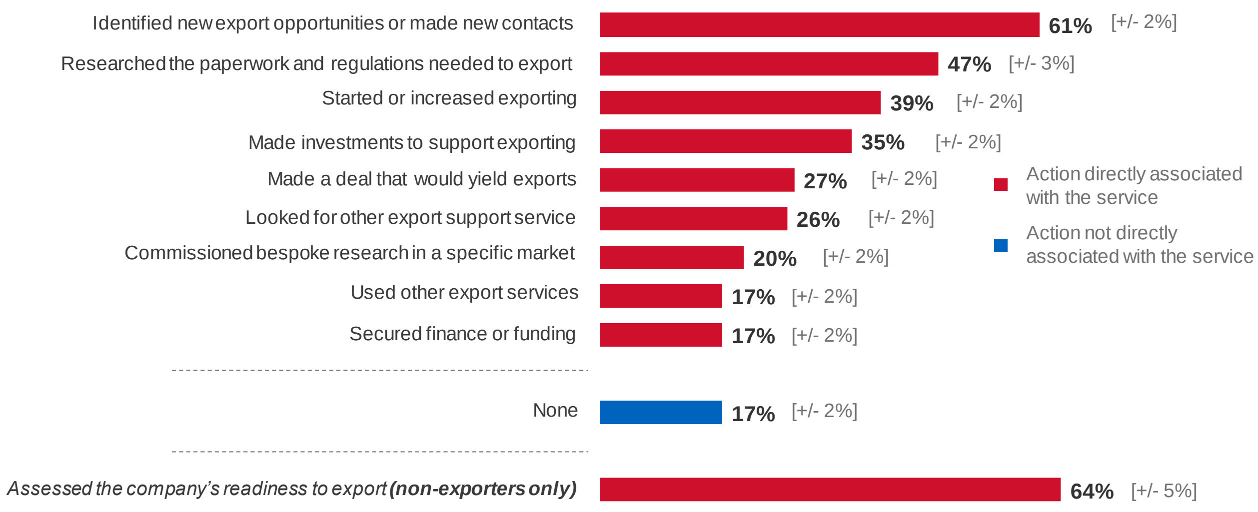
A series of questions explored what actions businesses report having taken as a result of their interaction with ITAs.

Businesses carried out a **range of actions as a result of using ITAs**. Chart 3.2.8 shows the actions that are most relevant to ITAs (above the dotted line)[13], as well as other actions that businesses may have taken.

Looking at the actions that are most relevant to ITAs, 64% of businesses who were not exporting at the time of using the service had assessed the company's readiness to export. All businesses were likely to say they identified new export opportunities or made new contacts (61%), researched the paperwork and regulations needed to export (47%) and started or increased exporting (39%), or made investments to support exporting (35%). A quarter made a deal that would yield exports (27%) or looked for other export support services (26%).

[13] 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 3.2.8 Actions taken as a result of service interaction - ITAs

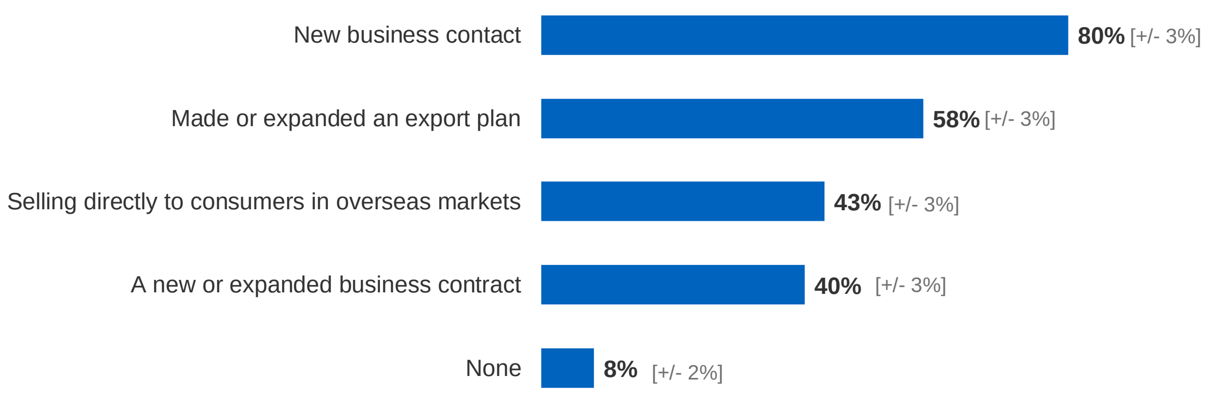


Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used ITAs (2001). Non-exporters (416)

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 3.2.9).

Respondents were most likely to say that they had identified new business contacts (80%), while the other main opportunities identified were making or expanding an export plan (58%), selling directly to consumers in overseas markets (43%) and making a new or expanded business contract (40%).

Chart 3.2.9 Opportunities identified as a result of service interaction – ITAs

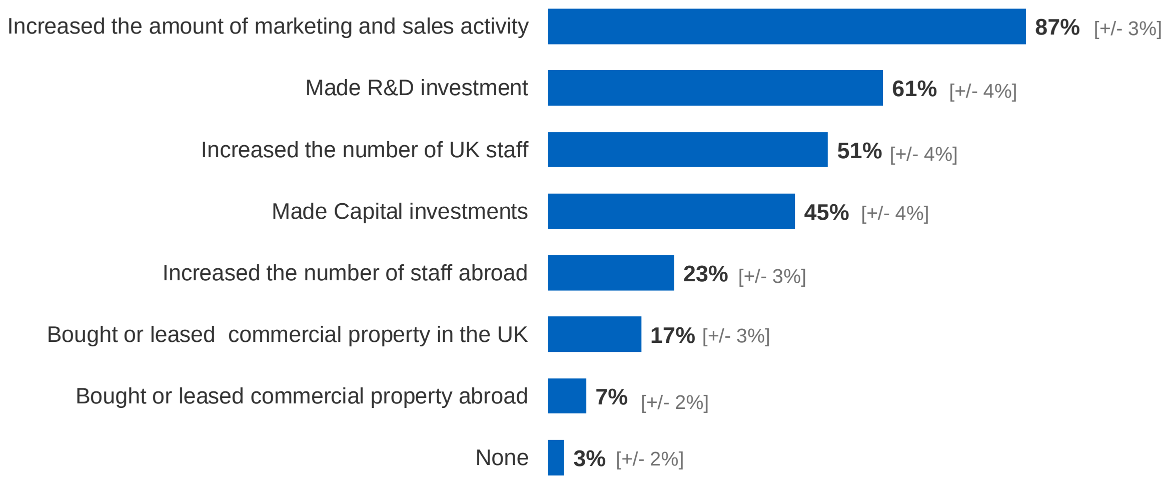


Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used ITAs who had identified a new business contact as part of the DIT service (1375)

Businesses that had identified a new business contact as part of the DIT service (1,087 respondents) were read a list of possible **types of contact** and asked which ones they had made. Around half of the businesses that had identified a new contact (51%) said they had made contact with a buyer, while just under half (46%) had made contact with a distributor.

If businesses reported they had made investments to support exporting as a result of using ITAs (693 businesses), they were asked to specify the **type of investment** they had made. Just under nine in ten (87%) said they had increased their marketing and sales activity, while six in ten made a Research and Development investment (61%) and half increased the number of UK staff (51%); see Chart 3.2.10.

Chart 3.2.10 Type of investments made as a result of DIT service – ITAs



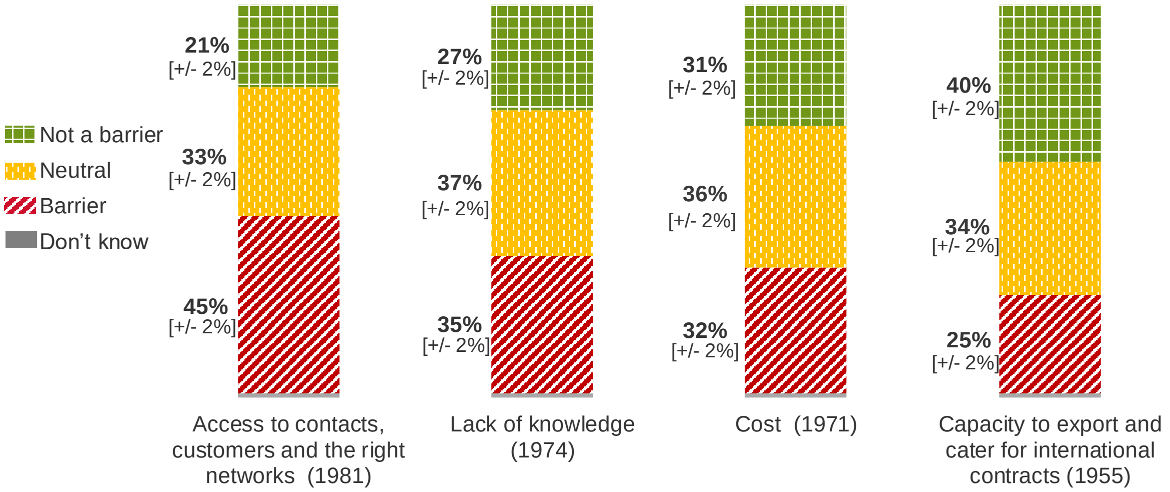
Qresult_invest - Which of the following investments has your business made to support new or increased export opportunities? IF NECESSARY: Please only think about investments relating to export activity. Table is restricted to answers given by more than 3% of respondents. Base: All respondents who had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

Businesses that export online were more likely to have increased the amount of marketing and sales activity (91% compared with 84%) or made any capital investments (52% compared with 40%). Businesses that sell only services overseas were more likely than businesses selling only goods to have increased the number of staff abroad (33% compared with 17%), or bought or leased commercial property abroad (11% compared with four per cent). Businesses that only sell goods overseas were more likely to have made any capital investment (50%) compared with businesses that only sell services overseas (31%). Businesses with a turnover of £500,000 or more were more likely to have increased the number of UK staff (61% compared with 38%).

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 (45% gave a score of seven or more out of ten), while around a third said that lack of knowledge (35%) and cost (32%) and were barriers. A quarter (25%) said that capacity to export and cater for international contracts was a barrier; see Chart 3.2.11.

Chart 3.2.11 Barriers to exporting – ITAs



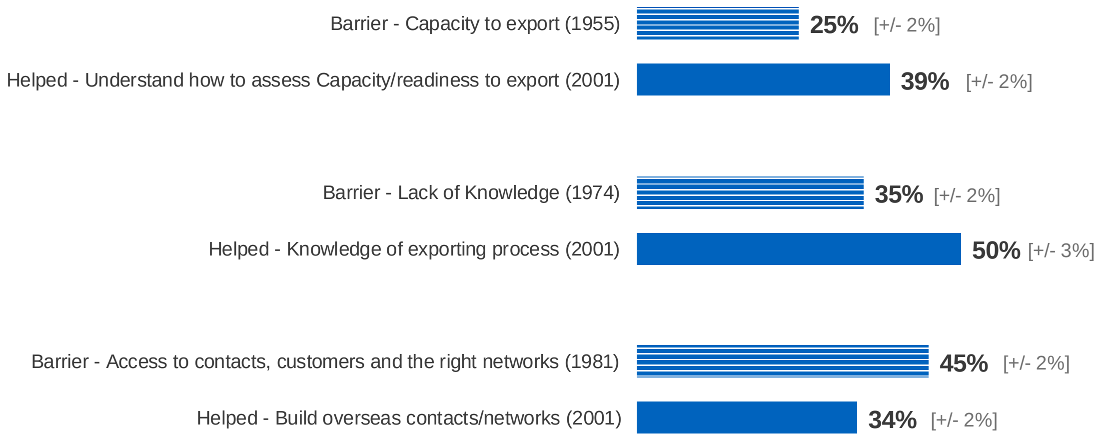
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used ITAs, except those giving a 'not applicable' answer

New exporters were more likely to say that lack of knowledge (41%), cost (39%) and capacity (33%) were barriers to exporting. Micro businesses (with between zero and nine employees) were also more likely to say that access to contacts (48%), cost (35%) and capacity (27%) were barriers to exporting.

Chart 3.2.12 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 (25%) said that their capacity to export was a barrier, while a higher proportion (39%) said ITAs helped them understand how to assess their capacity and readiness to export. One in three (35%) said that lack of knowledge was a barrier to exporting; a higher proportion (50%) said that ITAs helped them increase their knowledge of the exporting process. More than four in ten (45%) 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.

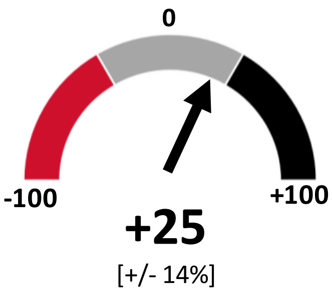
Chart 3.2.12 Barriers to exporting and how DIT helped – ITAs



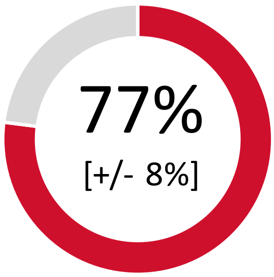
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used ITAs, except those giving a ‘not applicable’ answer
Qknowchange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

Summary page – Missions

Net Promoter Score

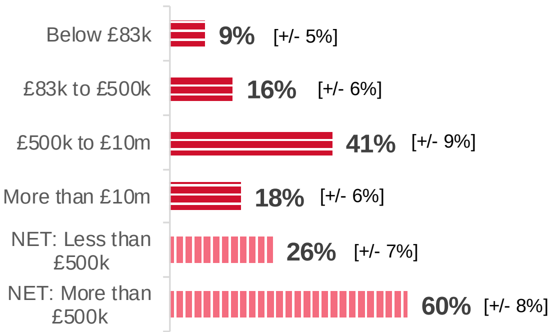


Satisfaction with service

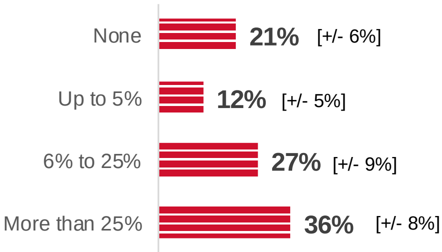


Turnover

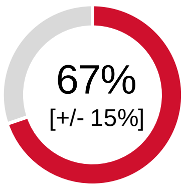
Turnover



% of turnover from exporting

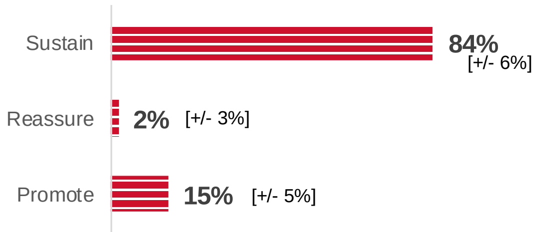


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

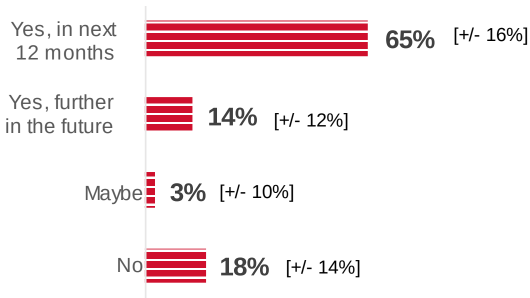


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.3 Missions

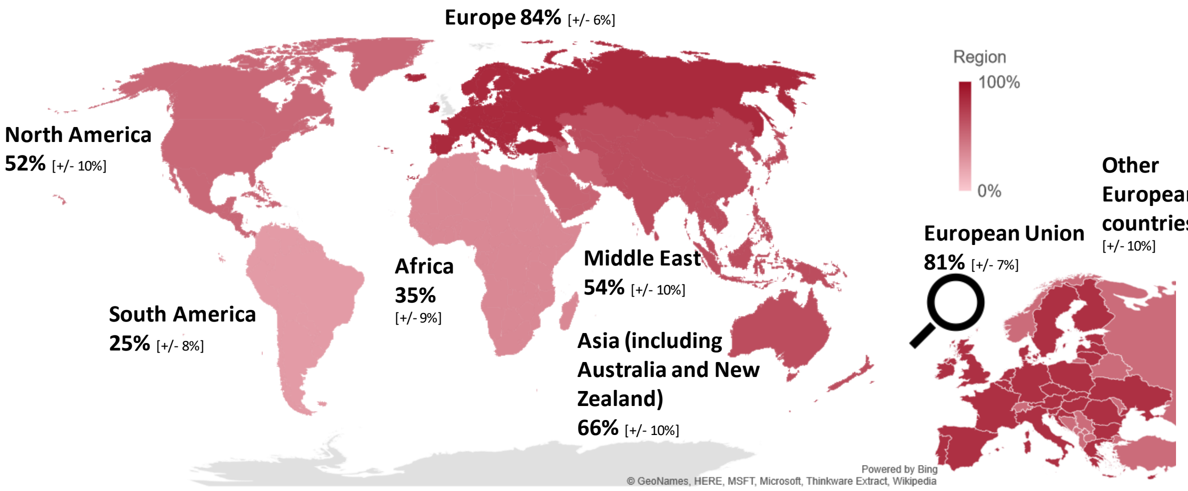
Missions are services related to events (trade fairs and market research) but with a specific focus on face to face deal-making. Inward missions are where groups from outside the UK are brought in for events or meetings. Outward missions are where groups from inside the UK are taken overseas for events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

These findings are based on interviews with 167 businesses who used the Missions service in April 2018 to March 2019. Just under half (46%) sold goods overseas and two-thirds (67%) sold services (33% only sold goods, 54% only sold services and 13% sold both).

3.3.1 Missions: Business export status

Overall, at the time of the survey 84% of businesses that used Missions were currently exporting by selling goods or services or had done previously. Of these, eight in ten (81%) exported goods or services within the European Union and half (50%) sold within the rest of Europe. Two in three sold goods or services in Asia (66%) and just over half in the Middle East (54%) or North America (52%). Smaller proportions sold in Africa (35%) and South America (25%).

Chart 3.3.1 Regions organisations exports to or exported to previously – Missions



Europe	84% [+/- 6%]
Asia (including Australia and New Zealand)	66% [+/- 10%]
Middle East	54% [+/- 10%]
North America	52% [+/- 10%]
Africa	35% [+/- 9%]
South America	25% [+/- 8%]

European Union	81% [+/- 7%]
Other European countries	50% [+/- 10%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Missions and who have exported (141)

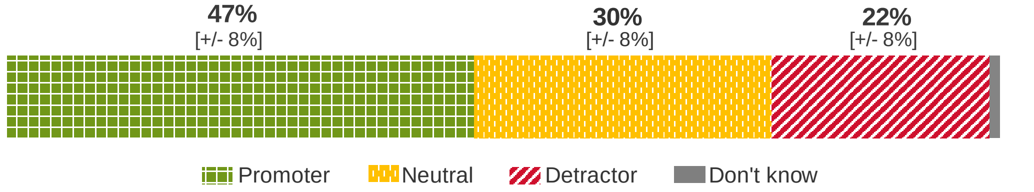
3.3.2 Service performance: Missions

This section examines the performance of the Missions service. It covers 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 Missions, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. Just under half of businesses (47%) were 'Promoters' of Missions (score of nine or ten), while around one in five (22%) were 'Detractors' (score of zero to six) and around three in ten (30%) were neutral (score of seven or eight); Chart 3.3.2 provides details. Overall, Missions had a positive NPS of 25.

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 (167)

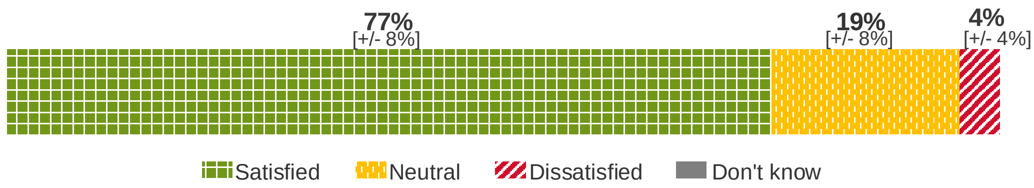
There were no noticeable differences by business type.

Businesses were asked to think about the service they received and suggest **ways in which it could be improved**. Communication was the most frequently reported area for improvement (21%), including eight per cent who said that they would like more feedback or follow-up. Businesses also said information (17%), including nine per cent who said they would like better or more information; contacts (11%); staff (ten per cent); and more support (ten per cent), including nine per cent who requested more specialist support, advice and help.

Businesses were asked **how satisfied they were** with the overall experience of the service, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[14].

Three-quarters (77%) were satisfied with their experience of Missions (rating of seven or more out of ten), and this included a fifth (21%) of businesses who gave a 'very satisfied' rating (ten out of ten). Four per cent of businesses were dissatisfied (rating of three or below) while one in five (19%) of businesses gave a neutral rating (between four and six). There was no noticeable difference by business type.

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 (165)

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

Perceptions of advice and support

Businesses were asked to rate the advice and support they received from the Missions service.

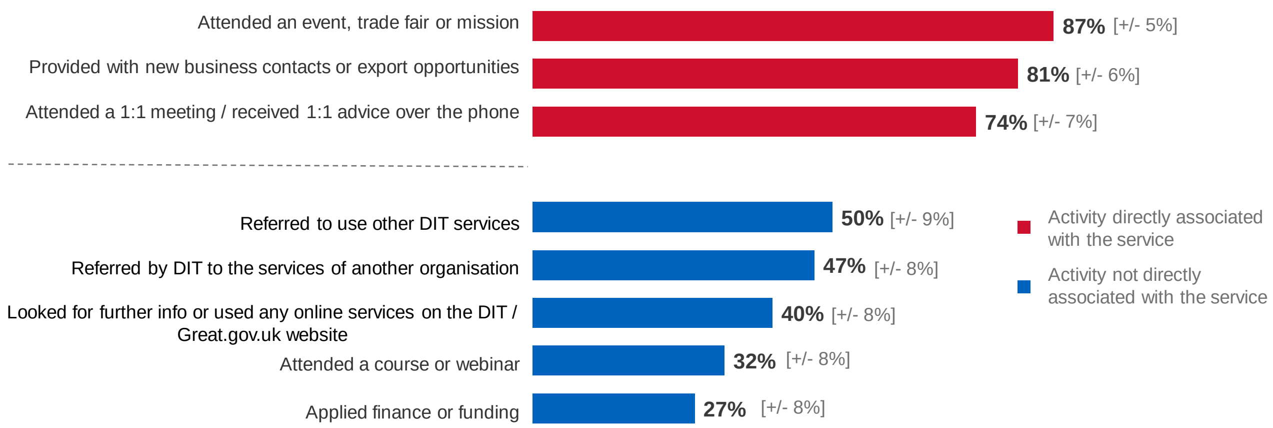
All respondents were asked **what happened when the organisation used the service** (Chart 3.3.4). The chart shows the activities that are most relevant to Missions (above the dotted line)[15], as well as other activities that businesses may have experienced.

Businesses were most likely to say that they attended an event, trade fair or mission (87%), provided with new business contacts or export opportunities (81%) or attended a one-to-one meeting or received one-to-one advice over the phone (74%).

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%) or referred by DIT to the services of another organisation (47%). Four in ten had looked for further information or used an online service on the DIT or Great.gov.uk website (40%). Around three in ten had attended a course or webinar (32%) or applied for finance or funding (27%).

There was no noticeable difference by business type.

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 (167)

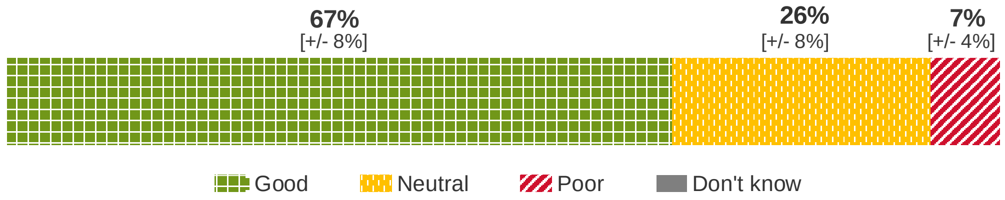
When asked which **specific types of support** they received as part of Missions, a third (33%) said they received tailored 'route to market' information or received an off-the-shelf overview for existing markets and sectors, 17% said they received support in advocacy, lobbying or supporting a bid. Fifteen per cent said they received market information about competition specific to their products or services or an analysis of suppliers and other players in the value chain (including distributors).

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).

[15] 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.

As shown in Chart 3.3.5, around two-thirds (67%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while 26% were neutral (score of four to six) and seven per cent said it was poor (rating of zero to three). There was no noticeable difference by business type.

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 (164)

Businesses were asked to **rate their experience on a number of criteria**. Findings are shown in Table 3.3.1 and Chart 3.3.6. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six as neutral, and zero to three are labelled as negative.

Around nine in ten (86%) businesses gave positive ratings for staff knowledge. Eight in ten were positive about the registration process (84% rated it as 'straight forward'), the organisation of the service (83% rated it as 'organised') and the external handover (80% rated it as 'satisfied'). Around three-quarters gave positive ratings for the comprehensiveness of information received (77%), the amount of time taken to receive information (76%), and for how clear the steps were that they needed to take when using the service (75%). Around two-thirds of businesses gave positive ratings for the quality of contacts they were provided with (68%) and how clear the steps they needed to take were after using the service (64%). There was no noticeable difference by business type.

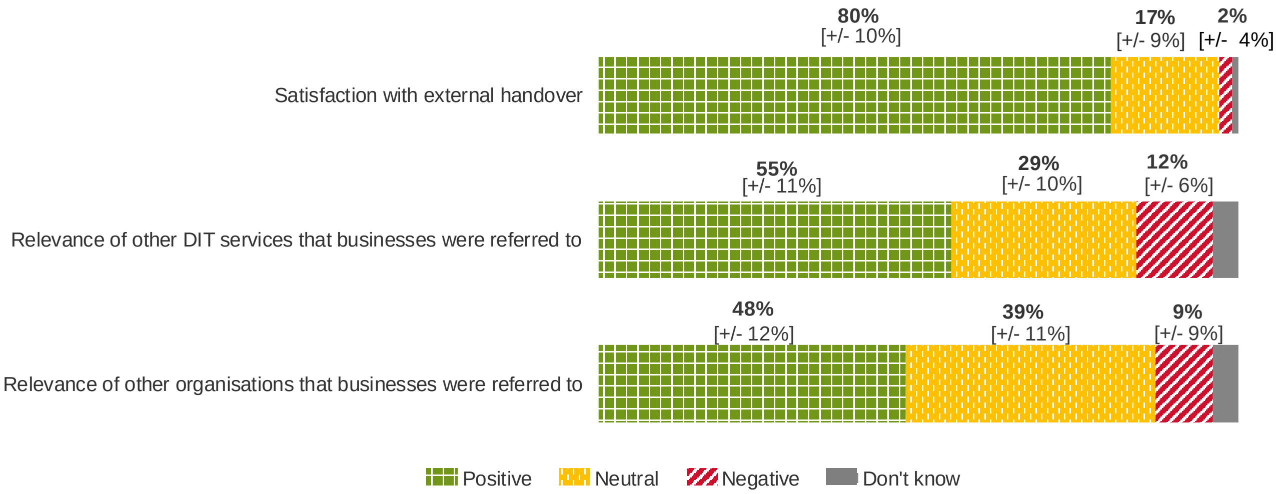
Businesses were least likely to give positive ratings for the relevance of services they were referred to – either other DIT services (55%) or those provided by other organisations (48%). Please note that the items in Chart 3.3.6 have a low base size, so results should be treated with caution.

Table 3.3.1 Rating by businesses of the specific advice and support they received – Missions

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
Rating of staff knowledge	**86%** [+/- 7%]	**12%** [+/- 7%]	**2%** [+/- 2%]
How straight forward was the registration for the service	**84%** [+/- 6%]	**9%** [+/- 5%]	**6%** [+/- 4%]
Rating of the organisation of the service	**83%** [+/- 6%]	**15%** [+/- 6%]	**2%** [+/- 3%]
How comprehensive was the information that they received	**77%** [+/- 8%]	**21%** [+/- 8%]	**2%** [+/- 3%]
Amount of time take to receive information	**76%** [+/- 8%]	**18%** [+/- 8%]	**5%** [+/- 4%]
How clear were the steps they needed to take when using the service	**75%** [+/- 8%]	**21%** [+/- 8%]	**2%** [+/- 2%]
Quality of contacts they were provided with	**68%** [+/- 9%]	**25%** [+/- 8%]	**6%** [+/- 4%]
How clear were the steps they needed to take after using the service	**64%** [+/- 9%]	**27%** [+/- 8%]	**8%** [+/- 5%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (165). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (160). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (162). Qclarity_1 - The service made clear the steps I needed to take when I was using it (161). Qclarity_2 - The service made clear what I should do next after using it (160). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (159. Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (159). Qevent - How would you rate the organisation of the [SAMPLED SERVICE]? (163). Base: All respondents that used Missions, except those giving a ‘not applicable’ answer

Chart 3.3.6 Rating by businesses of the handover and referrals they received – Missions*



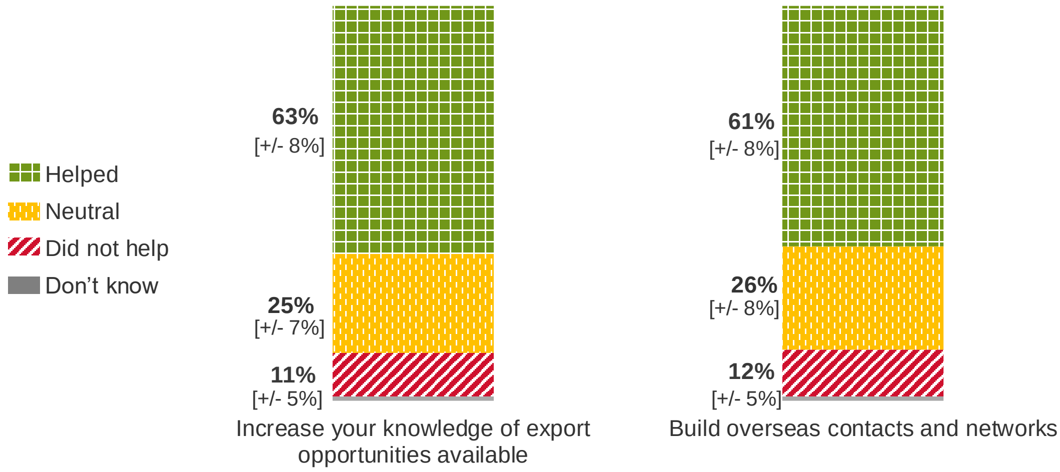
Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (76*) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (84). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (76*). Base: All respondents that used Missions, except those giving a 'not applicable' answer
*Low base size, please treat results with caution

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 3.3.7 shows the items that were asked of businesses that used Missions. This shows that:

- Two-thirds of businesses (63%) said that the service helped them by increasing their knowledge of export opportunities available, while one in ten (11%) said the service did not help them in this way.
- Similarly, six in ten businesses (61%) said the service had helped them build overseas contacts and networks, 12% said they were not helped in this way.

There were no noticeable differences by business type.

Chart 3.3.7 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 (167)

Actions taken as a result of service interaction

A series of questions explored what actions businesses reported having taken as a result of their interaction with Missions, examining additional support received, investments made by the business as a result of using the service, any business opportunities they identified and contacts they made.

Businesses reported carrying out a **range of actions as a result of using Missions**. Chart 3.3.8 shows the actions that are most relevant to Missions (above the dotted line)[16], as well as other actions that businesses may have taken.

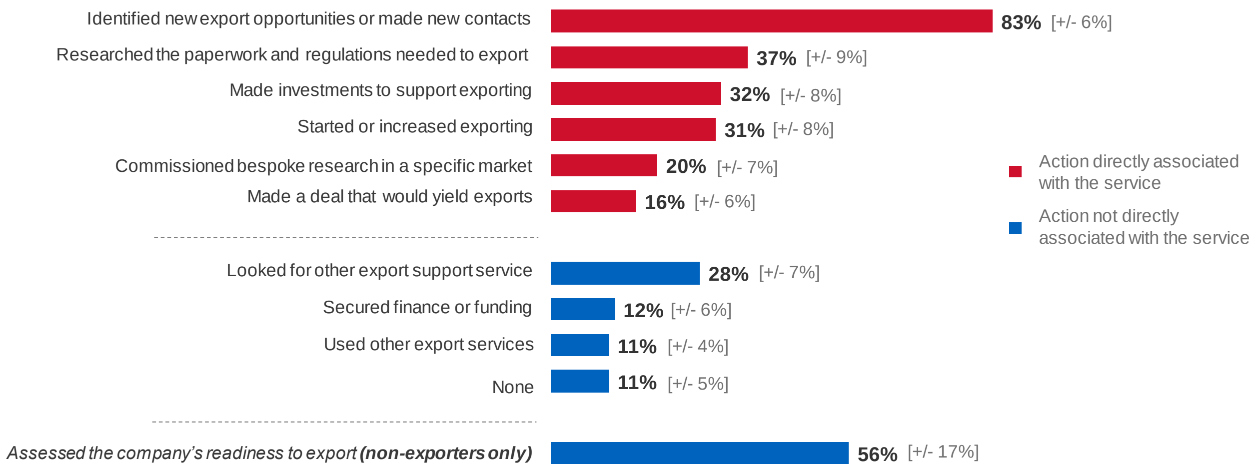
Looking firstly at the actions that are most relevant to Missions, businesses were most likely to say they had identified new export opportunities or made new contacts (83%), researched the paperwork and regulations needed to export (37%) or made investments to support exporting (32%). A third (31%) 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 (56%). A quarter (28%) of all businesses had looked for other export support services. A smaller proportion of businesses reported having secured finance or funding (12%); used other export services (11%) or assessed the company’s readiness to export (10%).

---

[16] 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 3.3.8 Actions taken as a result of service interaction – Missions

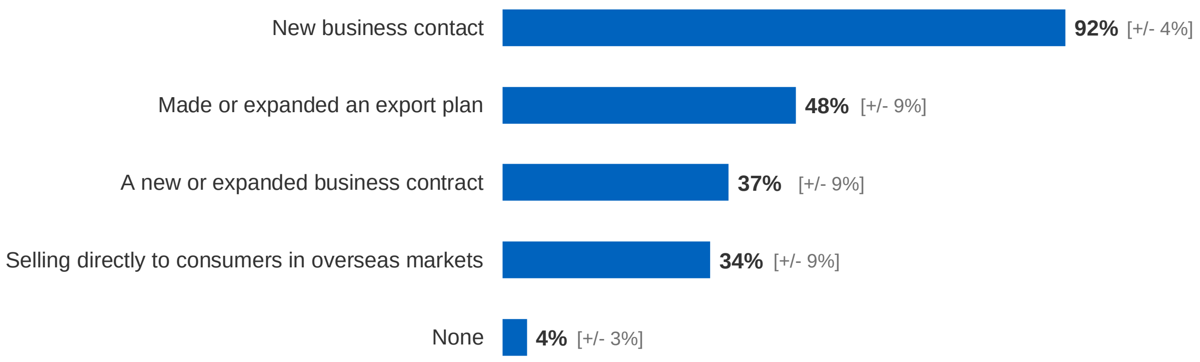


Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 3% of respondents. Base: All respondents who used Missions (167). Non-exporters (33)

There were no noticeable differences by business type.

Businesses that had identified, or been provided with, new business contacts or export opportunities as part of the Missions service were asked **what types of opportunities had been identified** (see Chart 3.3.9). Businesses were most likely to say that they had identified new business contacts (92%). Half (48%) had made or expanded a business plan whilst one in three made a new or expanded business contract (37%) or sold directly to consumers in overseas markets (34%).

Chart 3.3.9 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 3% of respondents. Base: All respondents that used Missions who had an opportunity as a result of service (151)

Businesses that had identified a new business contact as part of attending a Mission (136 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 (54%), while 32% had made contact with a distributor and 22% with an agent.

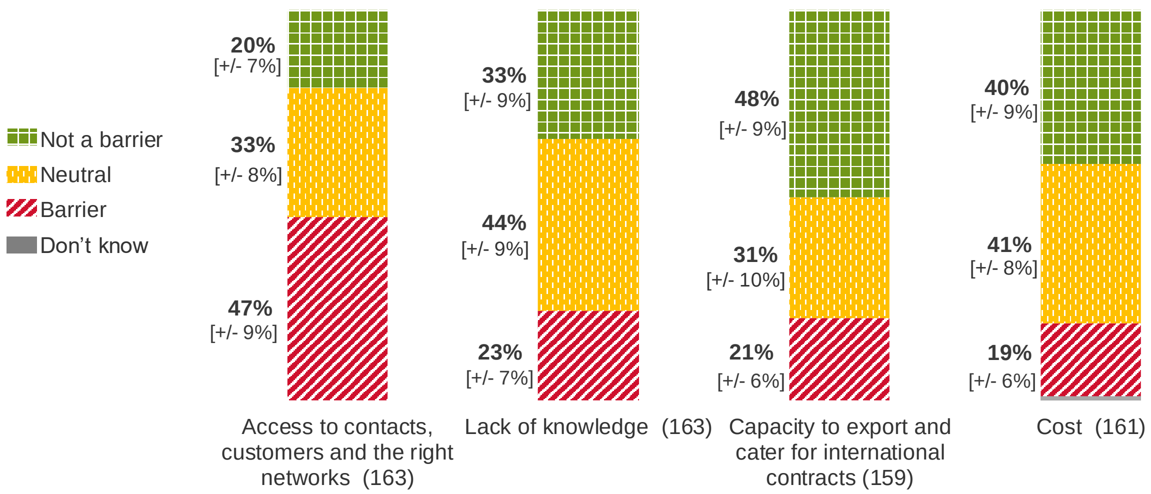
Barriers to exporting – Missions

Businesses were asked about four **potential barriers for their business in relation to exporting** and 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 (47%) for businesses. Businesses were more likely to say that lack of knowledge, cost and capacity were not barriers.

- Access to contacts, customers and the right networks was described as a barrier by half (47%) of businesses, while two in ten (20%) said it was not a barrier.
- Two in ten (23%) businesses described lack of knowledge as a barrier, whilst a third (33%) said it was not a barrier.
- Two in ten (21%) businesses described capacity to export and cater for international contracts as a barrier, whilst half (48%) said it was not a barrier.
- Two in ten (19%) business described cost as a barrier, whilst four in ten (40%) said it was not a barrier.

Chart 3.3.10 Barriers to exporting – Missions

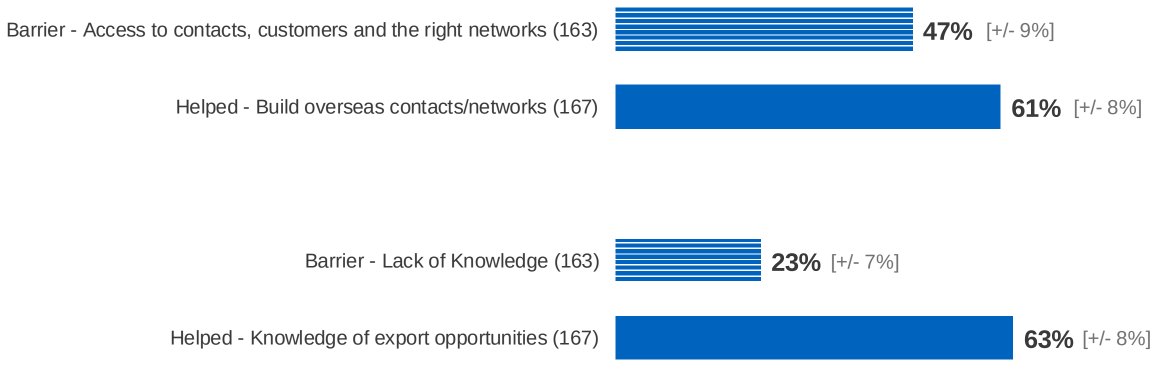


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Missions, except those giving a 'not applicable' answer

Chart 3.3.11 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 the exporting process and build overseas contacts and networks.

One in five businesses (23%) said that a lack of knowledge was a barrier for their business, while 63% said that Missions had helped them to increase knowledge of the exporting process. Just under half (47%) of businesses said that access to contacts, customers and the right networks was a barrier for their business; 61% of businesses said that Missions had helped them to build overseas contacts and networks.

Chart 3.3.11 Barriers to exporting and how DIT helped – Missions

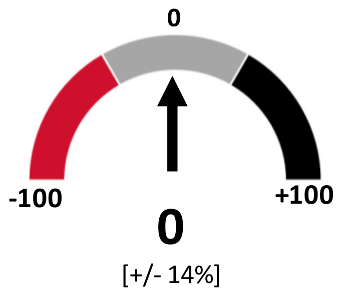


Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Missions, except those giving a 'not applicable' answer

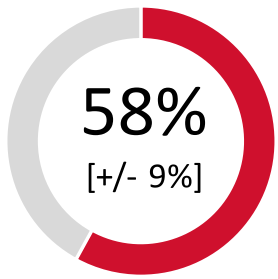
Qknowchange - Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to…Increase your knowledge of the process of exporting / Build overseas contacts and networks. Base: All respondents who used Missions

Summary page – OBNI

Net Promoter Score

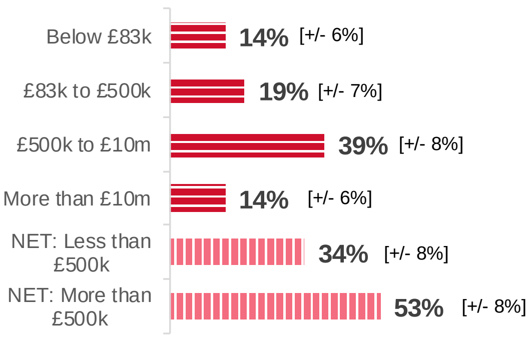


Satisfaction with service

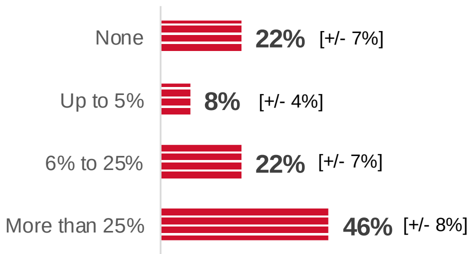


Turnover

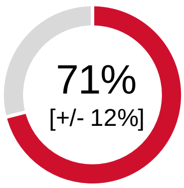
Turnover



% of turnover from exporting

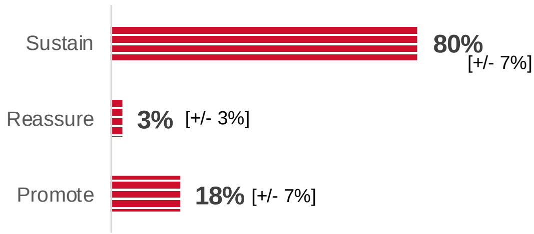


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

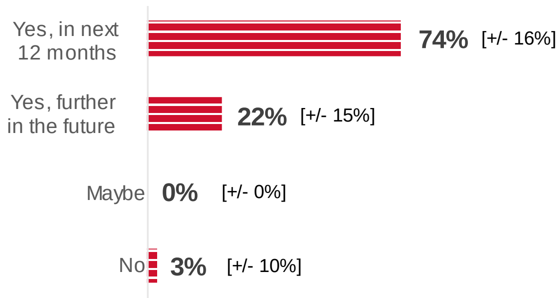


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.4 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.

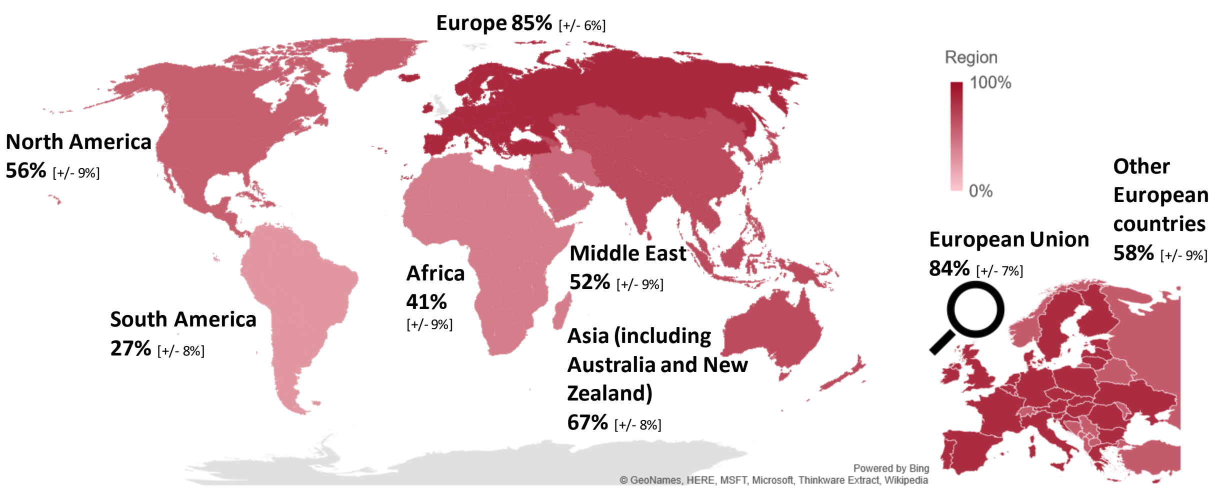
These findings are based on interviews with 154 businesses who used the OBNI service in April 2018 to March 2019. Three-quarters (74%) sold goods overseas and a third (36%) sold services (64% only sold goods, 26% only sold services and 11% sold both).

This report only captures those partner organisations that record service delivery data onto DIT's client relationship management system.

3.4.1 OBNI: Business export status

Eighty per cent of businesses currently export by selling goods or services or have done previously. Of these, more than three-quarters (84%) sold within the European Union and three-fifths (58%) have sold within the rest of Europe. Two-thirds (67%) sold in Asia, including Australia and New Zealand. Over half (56%) sold in North America, and the Middle East (52%), while four in ten (41%) sold in Africa. A smaller proportion sold in South America (27%).

Chart 3.4.1 Regions organisations exports to or exported to previously – OBNI



Europe	85% [+/- 6%]
Asia (including Australia and New Zealand)	67% [+/- 8%]
North America	56% [+/- 9%]
Middle East	52% [+/- 9%]
Africa	41% [+/- 9%]
South America	27% [+/- 8%]

European Union	84% [+/- 7%]
Other European countries	58% [+/- 9%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used OBNI and who have exported (129)

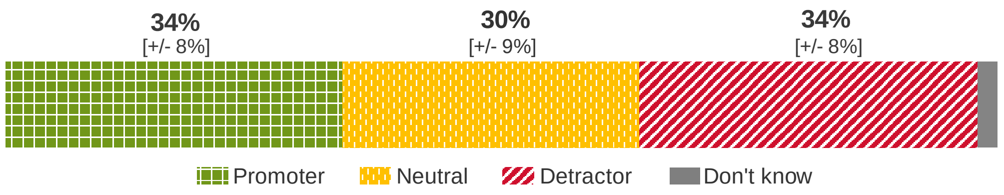
3.4.2 Service performance: OBNI

This section examines the performance of the service provided by the OBNI. It covers 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 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) and assigned a Net Promoter Score (NPS). One third (34%) were 'Promoters' of OBNI (score of nine or ten), while an equal number (34%) were 'Detractors' (score of zero to six) and three in ten (30%) were neutral (score of seven or eight); Chart 3.4.2 provides details. Overall, OBNI had an NPS of 0. There were no noticeable differences by business type.

Chart 3.4.2 Likelihood of recommending service (NPS) – OBNI



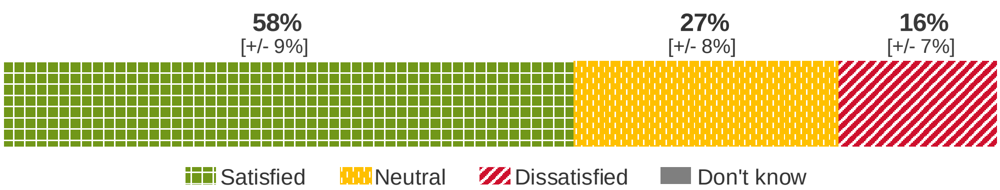
Qlikrec - Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used OBNI (154)

Businesses were asked about ways the service they used **could be improved**. Support was the most frequently cited area for improvement (19%), specifically more support, advice and to be more helpful. Other suggested areas for improvement were communication (18%), including better or more communication. A fifth (18%) cited 'none' when asked how the service could be improved.

Businesses were asked **how satisfied they were** with the overall experience of using the service. They were asked to rate the service on a scale from zero (very dissatisfied) to ten (very satisfied)[17].

Six in ten businesses (58%) were satisfied with their experience of OBNI (rating of seven or more out of ten). Sixteen per cent of businesses were dissatisfied (rating of three or below), while a quarter (27%) gave a neutral rating (between four and six)[18]. There were no noticeable differences by business type.

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 (150)

---

[17] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.
[18] Dissatisfaction low base (n=29)

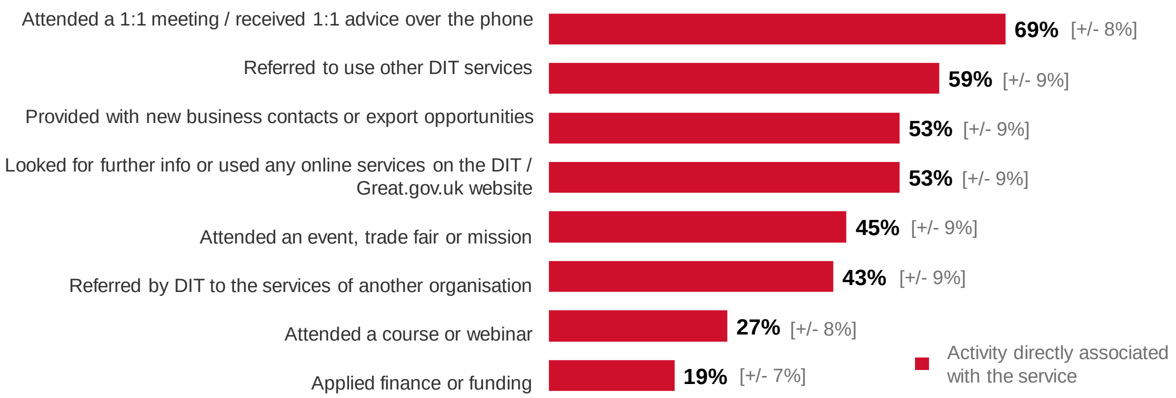
Perceptions of advice and support

Businesses were asked to rate 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 activities that are most 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 (69%), while three in five were referred to other DIT services (59%). Just over half looked for further information or used any online services on the DIT or Great.gov.uk website (53%) or were provided with new business contacts or export opportunities (53%). Forty-five per cent of businesses attended an event, trade fair or mission as a result of using OBNI. There were no noticeable differences by business type.

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 OBNI (154)

When asked which **specific types of support** they received as part of the OBNI service, 38% said they received an off-the-shelf overview for existing markets and sectors, 26% received tailored ‘route to market’ information, 15% received market information about competition specific to their products or services, 9% had an analysis of their suppliers and value chain, and six per cent received advocacy, lobbying or support for a bid.

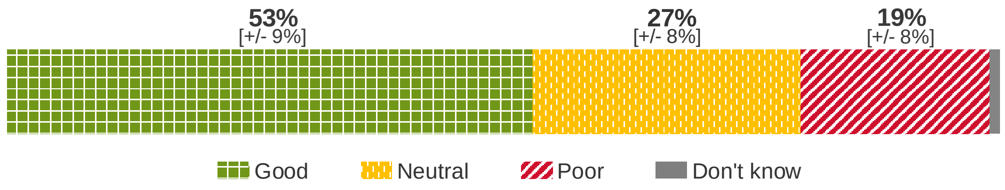
Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

Half of businesses (53%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while one in four (27%) were neutral (score of four to six) and one in five (19%) said it was poor (rating of zero to three). There were no noticeable differences by business type.

---

[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 3.4.5 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 (146)

Businesses were asked to **rate their experience on a number of criteria**. Findings are shown in Table 3.4.1 and Chart 3.4.6. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six are labelled as neutral, and zero to three are marked as negative.

The highest ratings for OBNI were given for satisfaction with external handover (73% rated handover as 'positive'), staff knowledge (69% rated staff as 'knowledgeable'), how comprehensive the information they received was (65% rated this as 'good'), the time taken to receive information or support (64% rated this as 'acceptable') and the clarity of the steps they needed to take when using the service (60% rated this as 'clear').

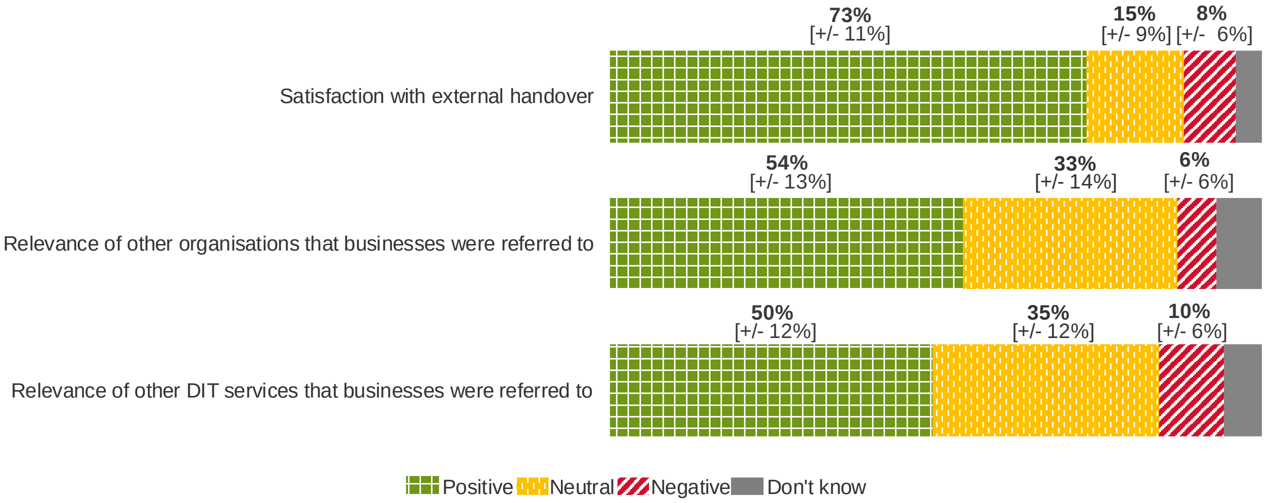
Businesses gave a lower rating for the quality of contacts they were provided with (55%) and the clarity of the steps they needed to take after using the service (54%). Half of businesses (50%) positively rated the relevance of the other DIT services that they were referred to. Please note that the items in Chart 3.4.6 have a low base size, so results should be treated with caution.

Table 3.4.1 Rating by businesses of the specific advice and support they received - OBNI

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
Rating of staff knowledge	**69%** [+/- 9%]	**19%** [+/- 8%]	**11%** [+/- 5%]
How comprehensive was the information that they received	**65%** [+/- 9%]	**21%** [+/- 7%]	**14%** [+/- 7%]
Amount of time take to receive information	**64%** [+/- 9%]	**24%** [+/- 7%]	**12%** [+/- 7%]
How clear were the steps they needed to take when using the service	**60%** [+/- 9%]	**26%** [+/- 8%]	**13%** [+/- 6%]
Quality of contacts they were provided with	**55%** [+/- 10%]	**23%** [+/- 8%]	**23%** [+/- 8%]
How clear were the steps they needed to take after using the service	**54%** [+/- 9%]	**25%** [+/- 8%]	**20%** [+/- 7%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (138). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (139). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (147). Qclarity_1 - The service made clear the steps I needed to take when I was using it (148). Qclarity_2 - The service made clear what I should do next after using it (144). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (130) Base: All respondents that used OBNI, except those giving a 'not applicable' answer

Chart 3.4.6 Rating by businesses of handovers and referrals – OBNI*



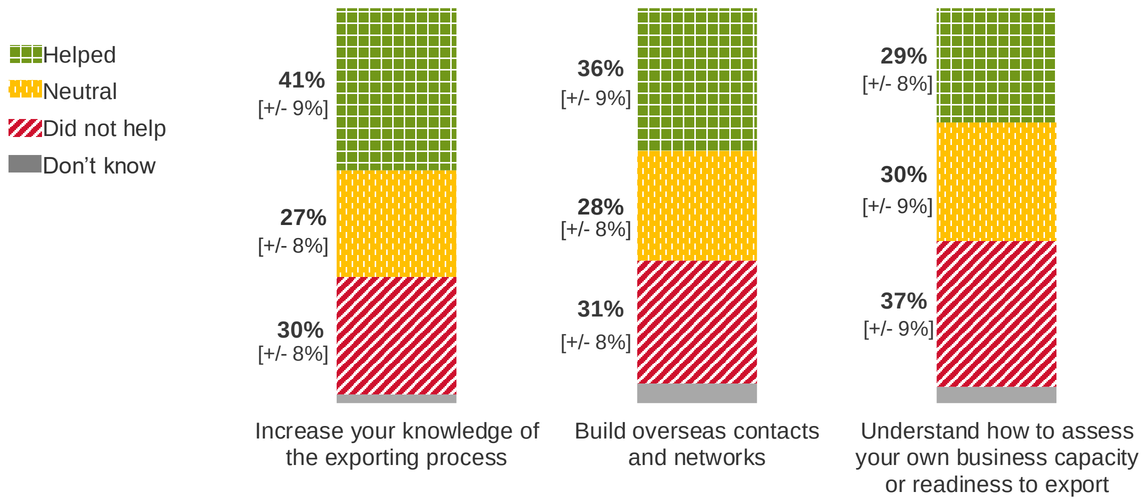
Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (66*) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (87). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (67*). Base: All respondents that used OBNI, except those giving a 'not applicable' answer
*Low base size, please treat results with caution

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. Chart 3.4.7 shows the items that were asked of businesses that used OBNI. This shows that:

- Two in five businesses that had used OBNI (41%) said that the service helped them by increasing their knowledge of the exporting process, while 30% said the service did not help them in this way.
- A third (36%) of businesses that had used OBNI said that the service helped to build overseas contacts and networks, while three in ten (31%) said that OBNI did not help them in this way.
- Three in ten businesses (29%) said that the service had helped them to understand how to assess their own business capacity or readiness to export, while a higher proportion (37%) said they were not helped in this way.

There were no noticeable differences by business type.

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 (154)

Actions taken as a result of service interaction

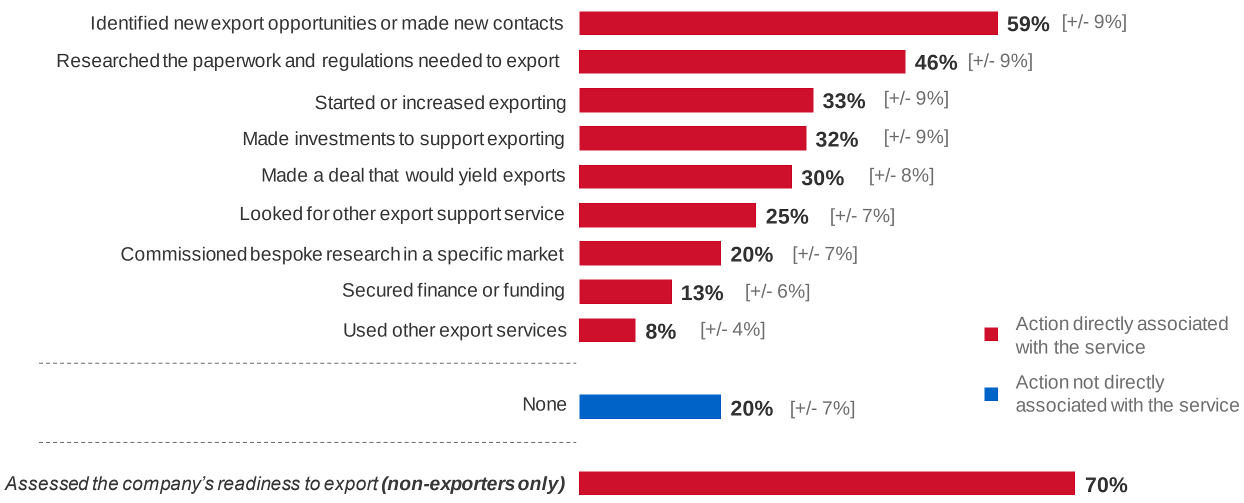
A series of questions explored what actions businesses reported having taken as a result of using OBNI, examining any additional support received and the types of investment they had made.

Businesses carried out a **range of actions as a result of using OBNI**. Chart 3.4.8 shows the actions that are most relevant to OBNI (above the dotted line)[20], as well as other actions that businesses may have taken.

Seven in ten (70%) businesses who were not exporting at the time of using the service had assessed the company's readiness to export. All businesses were most likely to say they identified new export opportunities or made new contacts (59%) or researched the paperwork and regulations needed to export (46%). A third started or increased exporting (33%), made investments to support exporting (32%) or made a deal that would yield exports (30%). A more detailed breakdown of responses is shown in Chart 3.4.9. There were no noticeable differences by business type.

[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.

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

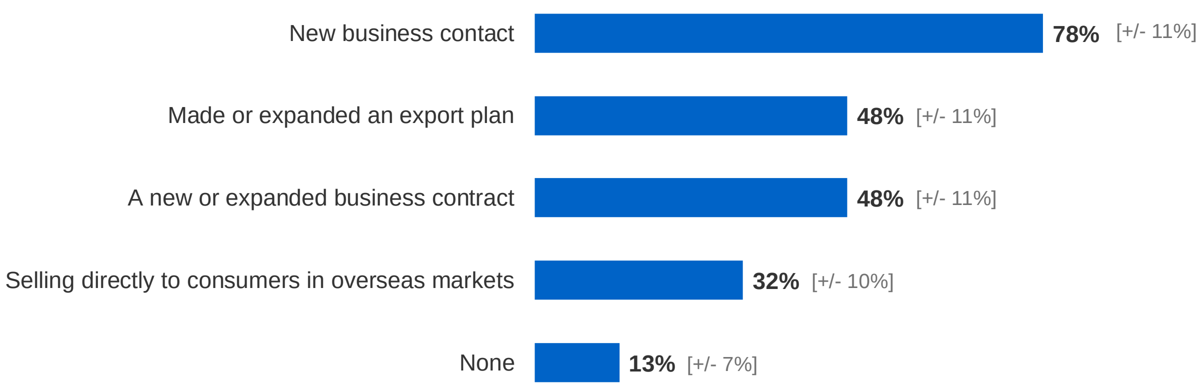


Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used OBNI (154). Non-exporters (30)

Businesses that had identified, or been provided with, new business contacts or export opportunities as a result of using OBNI (99 businesses) were asked **what types of opportunities had been identified** (see Chart 3.4.9).

Respondents were most likely to say that they had identified new business contacts (78%), while the other main opportunities were in making or expanding an export plan (48%), developing a new or expanded business contract (48%) and selling directly to consumers in overseas markets (32%).

Chart 3.4.9 Opportunities identified as a result of service - OBNI



Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 3% of respondents. Base: All respondents that used OBNI who had an opportunity as a result of service (99)

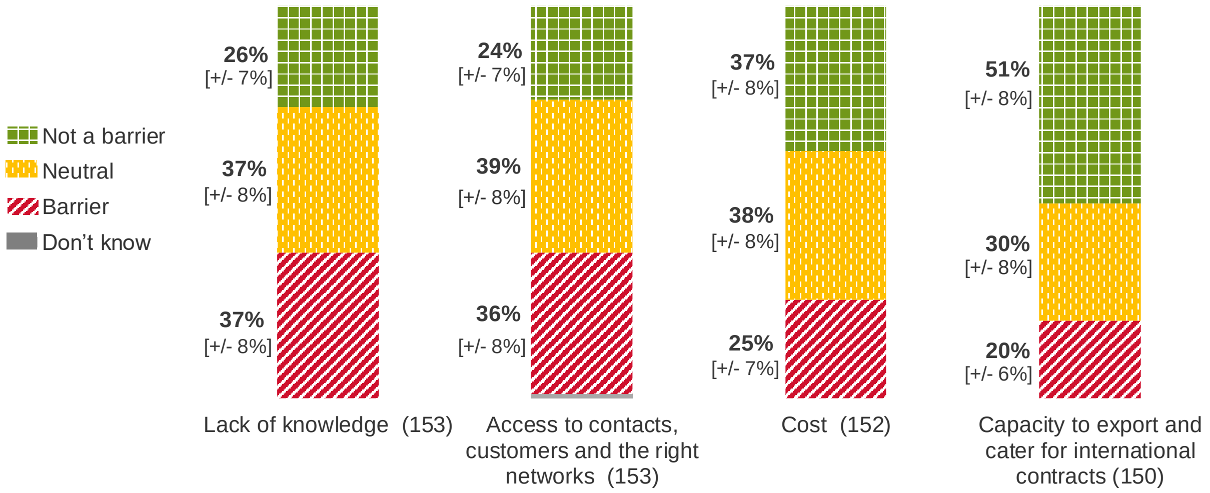
Businesses that had identified a new business contact as part of the DIT service (79 respondents) were read a list of possible **types of contact** and asked which ones they had made. Half of the businesses that had identified a new contact said they had made contact with a distributor (48%), while two in five (41%) had made contact with a buyer.

Barriers to exporting

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).

Businesses were more likely to say that lack of knowledge, or access to contacts, customers and the right networks were barriers to exporting than they were to say they were not barriers. Around a third (37%) of businesses said that lack of knowledge was a barrier for their business (compared with 26% who said it was not a barrier) and around a third (36%) said that access to contacts, customers and the right networks was a barrier for their business (compared with 24% who said it was not a barrier). A quarter (25%) of businesses said that cost was a barrier and two in ten (20%) cited the capacity to export and cater for international contracts; see Chart 3.4.10.

Chart 3.4.10 Barriers to exporting - OBNI

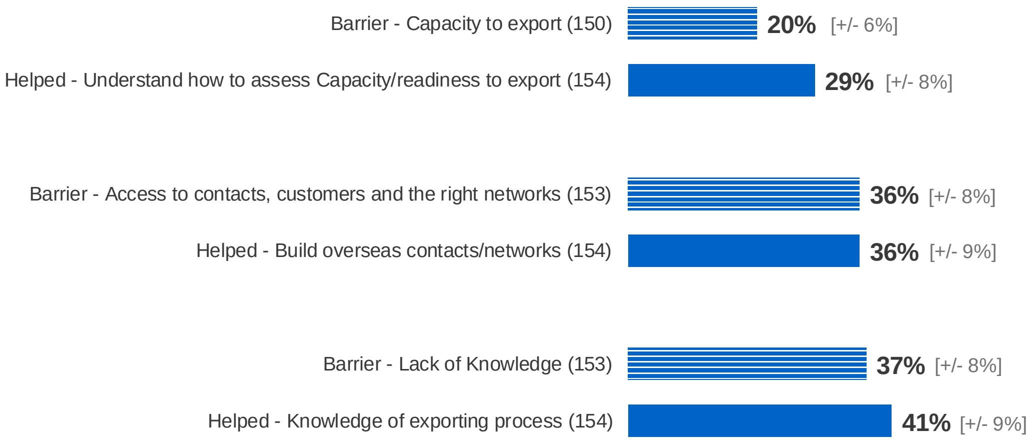


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OBNI, except those giving a 'not applicable' answer

Chart 3.4.11 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.

A higher proportion of businesses said that the OBNI helped them to understand how to assess capacity or readiness to export (29%) compared with the proportion who said it was a barrier (20%). A third (35%) of businesses thought that OBNI helped build overseas contacts or networks, a similar proportion who thought that access to contacts, customers and the right networks was a barrier to exporting. A third (37%) thought that a lack of knowledge was a barrier to exporting, and four in ten (41%) said that OBNI helped increase their knowledge of the exporting process.

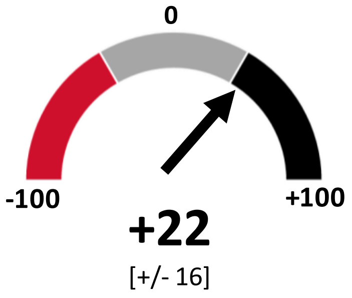
Chart 3.4.11 Barriers to exporting and how DIT helped – OBNI



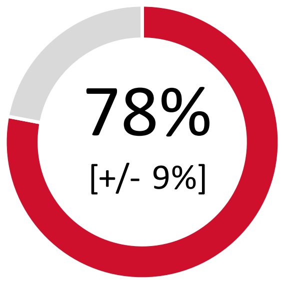
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OBNI, except those giving a 'not applicable' answer
Qknowchange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

Summary page – OMIS

Net Promoter Score

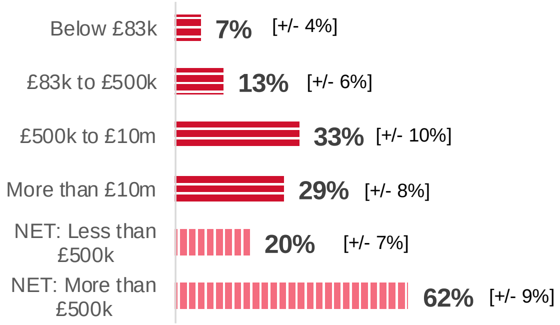


Satisfaction with service

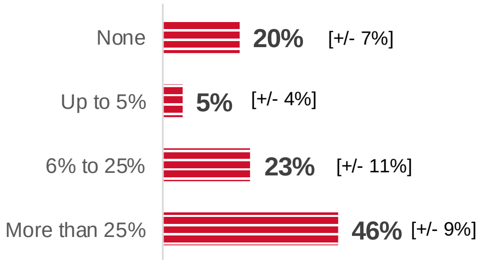


Turnover

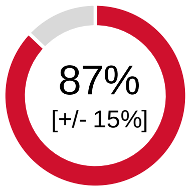
Turnover



% of turnover from exporting

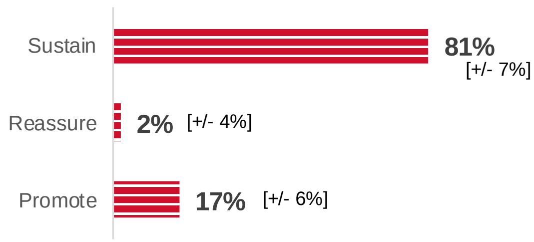


% of businesses who have increased proportion of turnover from exports in last 12 months



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

This chart has been suppressed due to a low base size

3.5 OMIS

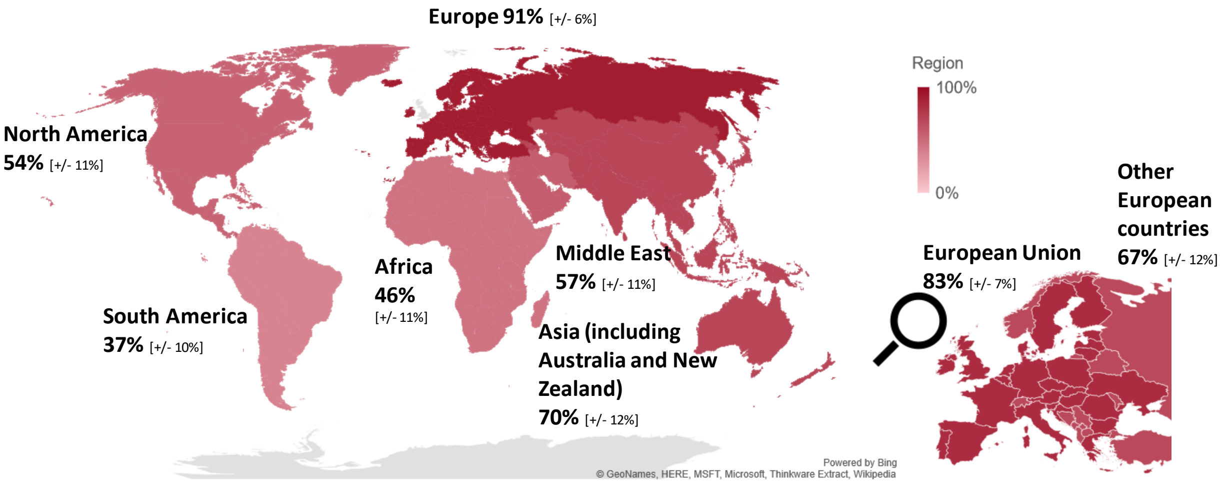
The Overseas Market Introduction Service (OMIS) is a charged service delivered by staff at British embassies and consulates overseas. It can provide information about an overseas market and contacts for possible customers or business partners. It can also provide other help such as planning and organising events or promotional activity in overseas markets.

These findings are based on interviews with 141 businesses who used OMIS in in April 2018 to March 2019. Two-thirds (64%) sold goods overseas and slightly fewer (61%) sold services (39% only sold goods, 36% only sold services and 25% sold both).

3.5.1 OMIS: Business export status

Eighty-one per cent of businesses currently export by selling goods or services or have done previously. Of these, more than three-quarters (84%) sold within the European Union and two-thirds (67%) sold within the rest of Europe. Seven in ten (70%) sold in Asia, and more than half sold in the Middle East (57%) or North America (54%). Smaller proportions sold in Africa (46%) and South America (37%).

Chart 3.5.1 Regions organisations exports to or exported to previously – OMIS



Europe	91% [+/- 6%]
Asia (including Australia and New Zealand)	70% [+/- 12%]
Middle East	57% [+/- 11%]
North America	54% [+/- 11%]
Africa	46% [+/- 11%]
South America	37% [+/- 10%]

European Union	83% [+/- 7%]
Other European countries	67% [+/- 12%]

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

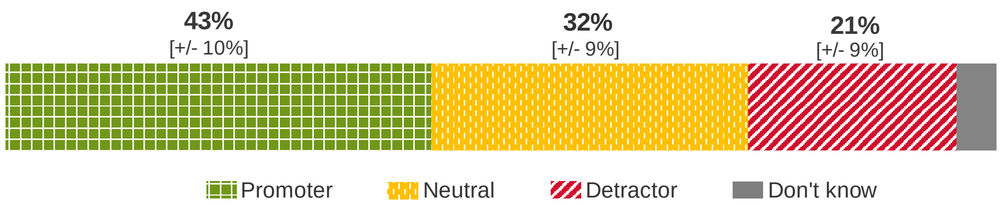
3.5.2 Service performance: OMIS

This section examines the performance of the service provided by OMIS. It covers 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 the OMIS 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) and assigned a Net Promoter Score (NPS). Two in five (43%) were 'Promoters' of OMIS (score of nine or ten), while one in five (21%) were 'Detractors' (score of zero to six) and one in three (32%) were neutral (score of seven or eight); Chart 3.5.2 provides details. Overall, OMIS had a positive NPS of +22. There were no noticeable differences by business type.

Chart 3.5.2 Likelihood of recommending service (NPS) – OMIS



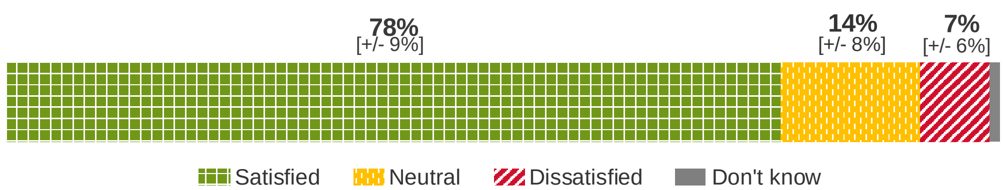
Qlikrec - Based on your experiences of [SAMPLED SERVICE], how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All respondents who used OMIS (141)

Businesses were asked about ways the service they used **could be improved**. Communication was the most frequently cited area for improvement (21%), specifically better or more communication. Other suggested areas for improvement were information (17%), including more or better information; contacts (13%), such as a wider range of contacts and quality of leads; support and advice (12%); and staff (11%).

Businesses were asked **how satisfied they were** with the overall experience of using the service. They were asked to rate the service on a scale from zero (very dissatisfied) to ten (very satisfied)[21].

More than three-quarters (78%) of businesses were satisfied with their experience of OMIS (rating of seven or more out of ten), which included two in ten businesses (21%) who gave a 'very satisfied' rating (ten out of ten). Seven per cent of businesses were dissatisfied (rating of three or below), while one in seven (14%) gave a neutral rating (between four and six)[22]. There were no noticeable differences by business type.

Chart 3.5.3 Satisfaction with service - OMIS



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 OMIS, except those giving a 'not applicable' answer (139)

[21] Here and throughout the report, businesses who gave an answer of 'not applicable' have been excluded from the analysis.
[22] Reasons for dissatisfaction with OMIS are not included, due to the small base size (6 respondents).

Perceptions of advice and support

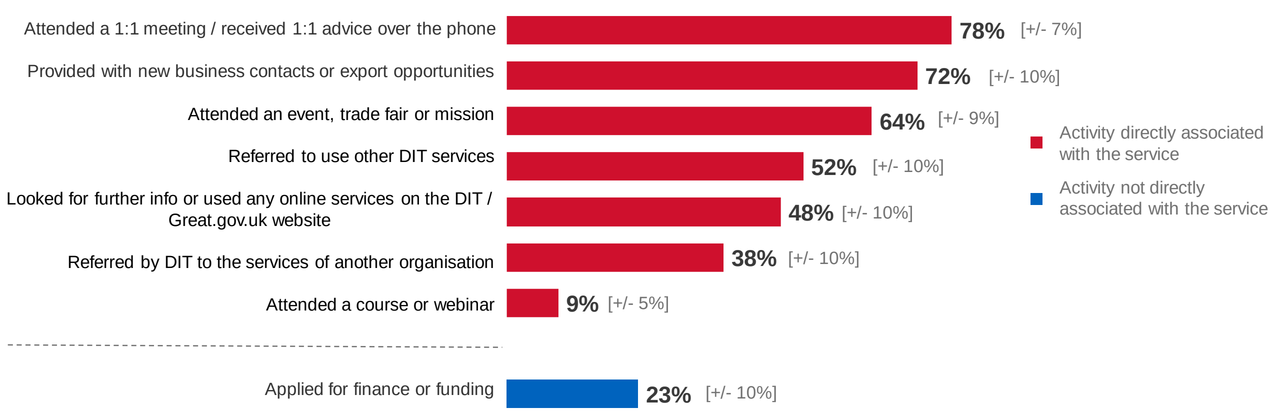
Businesses were asked to rate the advice and support they received from OMIS.

All respondents were asked **what happened when the organisation used the service** (Chart 3.5.4). The chart shows the activities that are most relevant to OMIS (above the dotted line)[23], 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 (78%), been provided with new business contacts or export opportunities (72%) or attended an event or trade fair or mission as a result of using the service (64%). Around half were referred to other DIT services (52%) or looked for further information or used any online services on the DIT or Great.gov.uk website (48%).

In addition, a quarter of businesses applied for finance or funding (23%). There were no noticeable differences by business type.

Chart 3.5.4 Specific activities experienced when using OMIS



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 OMIS (141)

When asked which **specific types of support** they received as part of OMIS, 36% said they received an off-the-shelf overview for existing markets and sectors, 33% received tailored 'route to market' information and 27% received market information about competition specific to their products or services. Two in ten (22%) had an analysis of their suppliers and value chain and 17% received advocacy, lobbying or support for a bid.

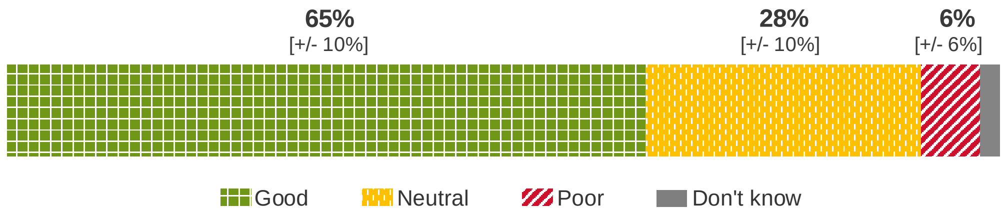
Businesses were asked to rate the **extent to which the overall service they received met their needs**, using a scale from ten (very good) to zero (very poor).

Two-thirds (65%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while a quarter (28%) were neutral (score of four to six) and six per cent said it was poor (rating of zero to three).

---

[23] 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 3.5.5 Rating of whether overall service met needs - OMIS



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 OMIS, except those giving a 'not applicable' answer (137)

Businesses were asked to **rate their experience on a number of criteria**. Findings are shown in Table 3.5.1 and Chart 3.5.6. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six are labelled as neutral, and zero to three are marked as negative.

The highest ratings for OMIS were given for staff knowledge (83% rated staff as 'knowledgeable') and the clarity of the steps they needed to take when using the service (80% rated this as 'clear'). Three-quarters of businesses were positive about the time taken to receive information or support (78% rated this as 'acceptable'), the registration process (78% rated this as 'straightforward') and how comprehensive the information they received was (76% rated this as 'good'). Seven in ten (72%) businesses were satisfied with the external handover.

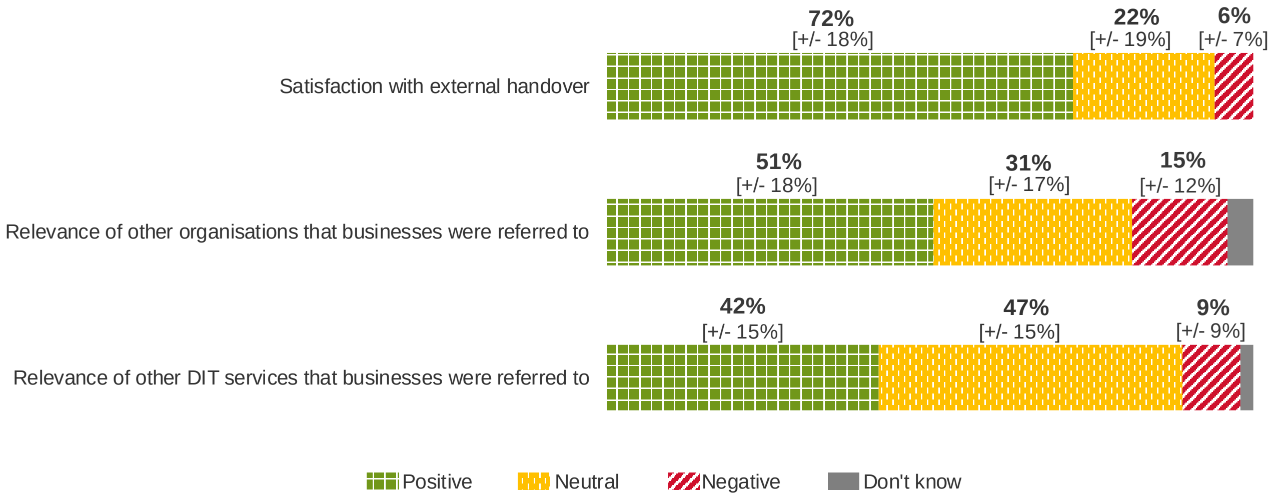
Businesses gave a lower rating for the relevance of referrals to other organisations (51%) and other DIT services (42%). Please note that the items in Chart 3.5.6 have a low base size, so results should be treated with caution.

Table 3.5.1 Rating by businesses of the specific advice and support they received - OMIS

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
Rating of staff knowledge	**83%** [+/- 9%]	**13%** [+/- 9%]	**4%** [+/- 4%]
How clear were the steps they needed to take when using the service	**80%** [+/- 8%]	**17%** [+/- 8%]	**2%** [+/- 2%]
How straight forward was the registration for the service	**78%** [+/- 10%]	**14%** [+/- 9%]	**5%** [+/- 4%]
Amount of time take to receive information	**78%** [+/- 10%]	**19%** [+/- 10%]	**2%** [+/- 4%]
How comprehensive was the information that they received	**76%** [+/- 10%]	**19%** [+/- 10%]	**4%** [+/- 3%]
Quality of contacts they were provided with	**72%** [+/- 10%]	**18%** [+/- 8%]	**9%** [+/- 8%]
How clear were the steps they needed to take after using the service	**67%** [+/- 9%]	**23%** [+/- 9%]	**7%** [+/- 5%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (135). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (130). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (135). Qclarity_1 - The service made clear the steps I needed to take when I was using it (136). Qclarity_2 - The service made clear what I should do next after using it (135). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (133) Base: All respondents that used OMIS, except those giving a ‘not applicable’ answer

Chart 3.5.6 Rating by businesses of handovers and referrals – OMIS*



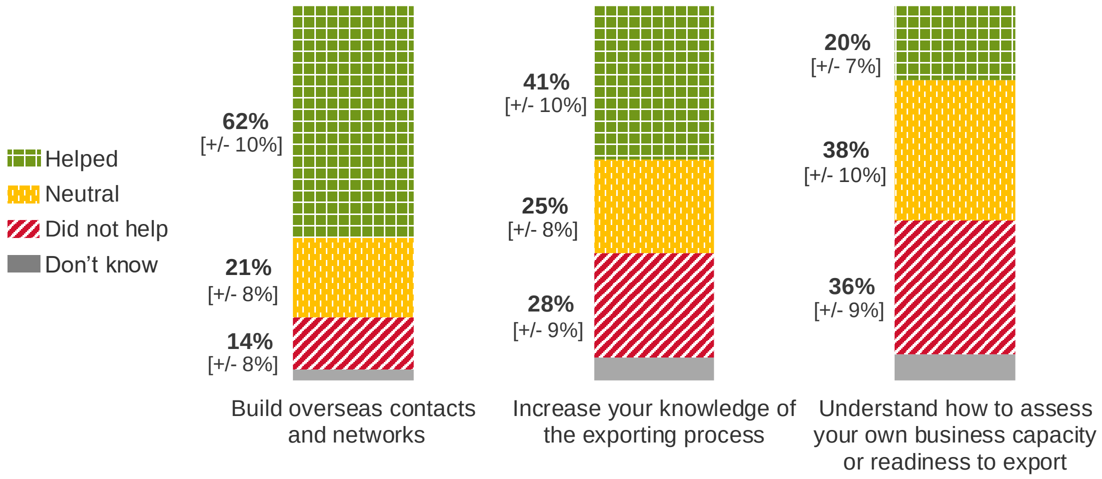
Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (46*) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (70*). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (48*). Base: All respondents that used OMIS, except those giving a 'not applicable' answer
*Low base size, please treat results with caution

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 0 (did not help at all). The individual aspects of help and support were tailored to the different services, and Chart 3.5.7 shows the items that were asked of businesses that used OMIS. This shows that:

- Three in five businesses that had used OMIS (62%) said that the service helped them to build overseas contacts and networks, while one in seven (14%) said that OMIS did not help them in this way.
- Two in five (41%) businesses that had used OMIS said that the service helped them by increasing their knowledge of the exporting process, while 28% said the service did not help them in this way.
- One in five businesses (20%) said that the service had helped them to understand how to assess their own business capacity or readiness to export, while a higher proportion (36%) said they were not helped in this way.

There were no noticeable differences by business type.

Chart 3.5.7 Perceptions of help OMIS 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 OMIS (141)

Actions taken as a result of service interaction

A series of questions explored what actions businesses reported having taken as a result of using OMIS, examining any additional support received and the types of investment they had made.

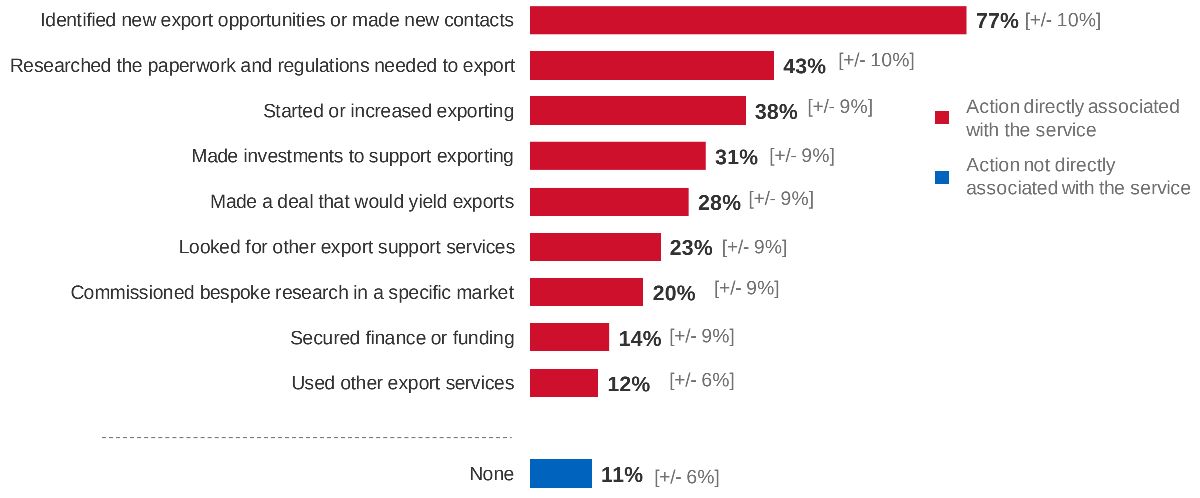
Businesses carried out a **range of actions as a result of using OMIS**. Chart 3.5.8 shows the actions that are most relevant to OMIS (above the dotted line)[24], as well as other actions that businesses may have taken.

Businesses were most likely to say they identified new export opportunities or made new contacts (77%), researched the paperwork and regulations needed to export (43%) and started or increased exporting (38%). A third of businesses made investments to support exporting (31%) or made a deal that would yield exports (28%). A more detailed breakdown of responses is shown in Chart 3.5.8. There were no noticeable differences by business type.

---

[24] 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 3.5.8 Actions taken as a result of service interaction - OMIS

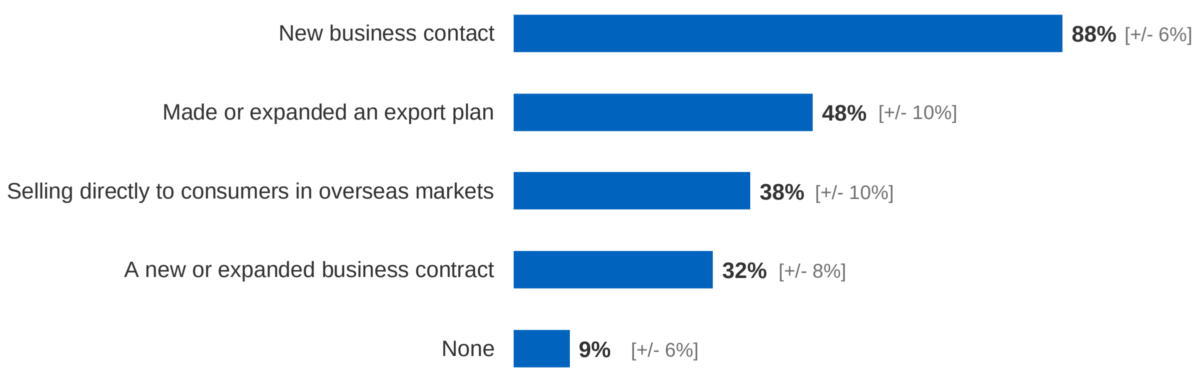


Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used OMIS (141)

Businesses that had identified, or been provided with, new business contacts or export opportunities as a result of using OMIS were asked **what types of opportunities had been identified** (see Chart 3.5.9).

Respondents were most likely to say that they had identified new business contacts (88%), while the other main opportunities were in making or expanding an export plan (48%), selling directly to consumers in overseas markets (38%) and developing a new or expanded business contract (32%). There were no noticeable differences by business type.

Chart 3.5.9 Opportunities identified as a result of service - OMIS



Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 3% of respondents. Base: All respondents that used OMIS who had an opportunity as a result of service (131)

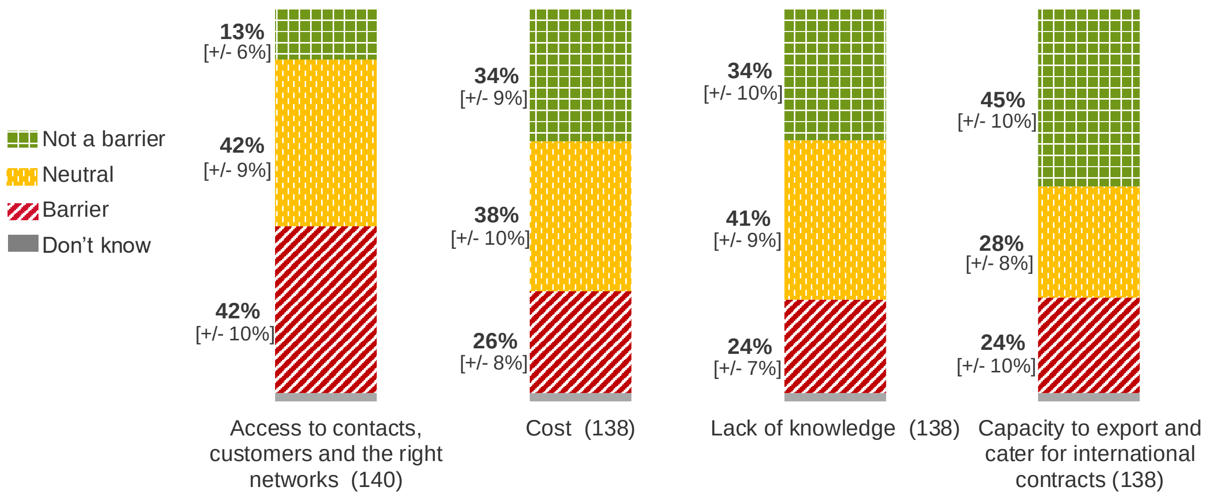
Businesses that had identified a new business contact as part of the DIT service (114 respondents) were read a list of possible **types of contact** and asked which ones they had made. More than half of the businesses that had identified a new contact said they had made contact with a buyer (52%), while two in five (42%) had made contact with a distributor.

Barriers to exporting

Businesses were asked about four **potential barriers for their business in relation to exporting** and 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 four in ten (42%) businesses said that access to contacts, customers and the right networks was a barrier for their business, while around a quarter considered the other issues a barrier: cost (26%), lack of knowledge (24%) and the capacity to export and cater for international contracts (24%); see Chart 3.5.10.

Chart 3.5.10 Barriers to exporting – OMIS

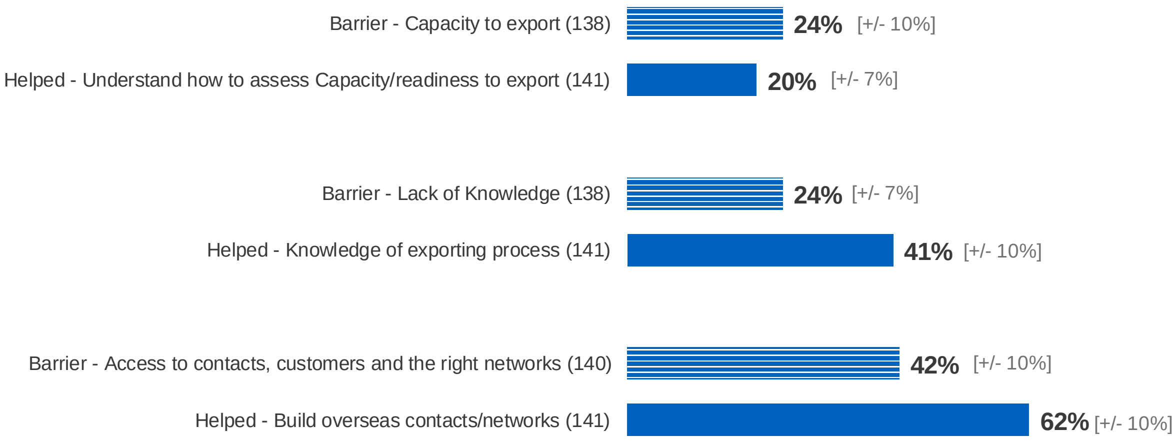


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OMIS, except those giving a 'not applicable' answer

Chart 3.5.11 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 OMIS 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.

Four in ten businesses (42%) said that access to contacts, customers and the right networks was a barrier for their business; more than half said that OMIS had helped them to build overseas contacts and networks (62%). A quarter of businesses (24%) said that lack of knowledge was a barrier; a higher proportion said OMIS helped them increase knowledge of the exporting process (41%). A quarter (24%) of businesses said that capacity to export was a barrier; a slightly lower proportion (20%) said that OMIS helped them to assess their own business capacity or readiness to export.

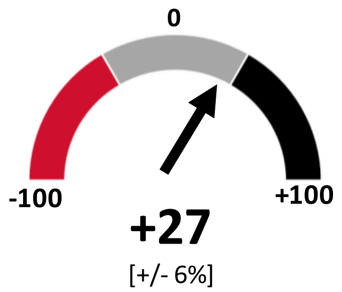
Chart 3.5.11 Barriers to exporting and how DIT helped – OMIS



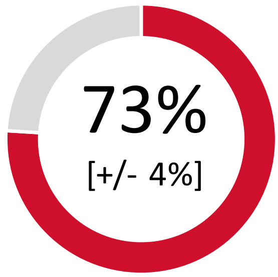
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used OMIS, except those giving a 'not applicable' answer
Qknowchange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

Summary page – Posts

Net Promoter Score

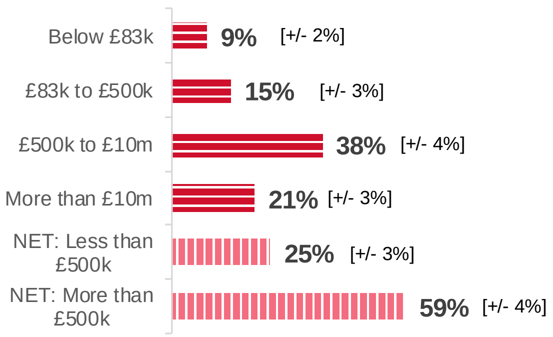


Satisfaction with service

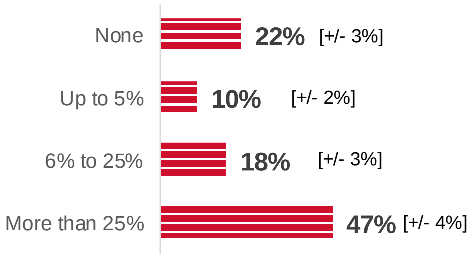


Turnover

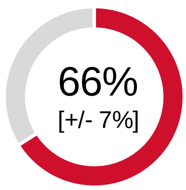
Turnover



% of turnover from exporting

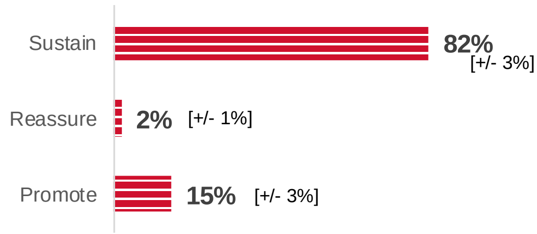


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

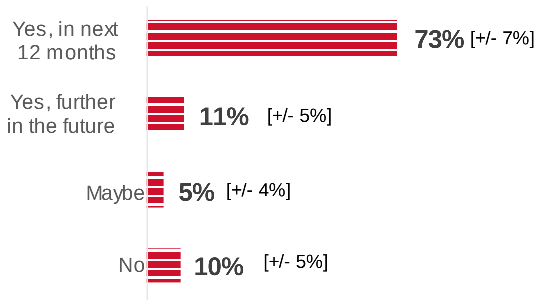


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.6 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.

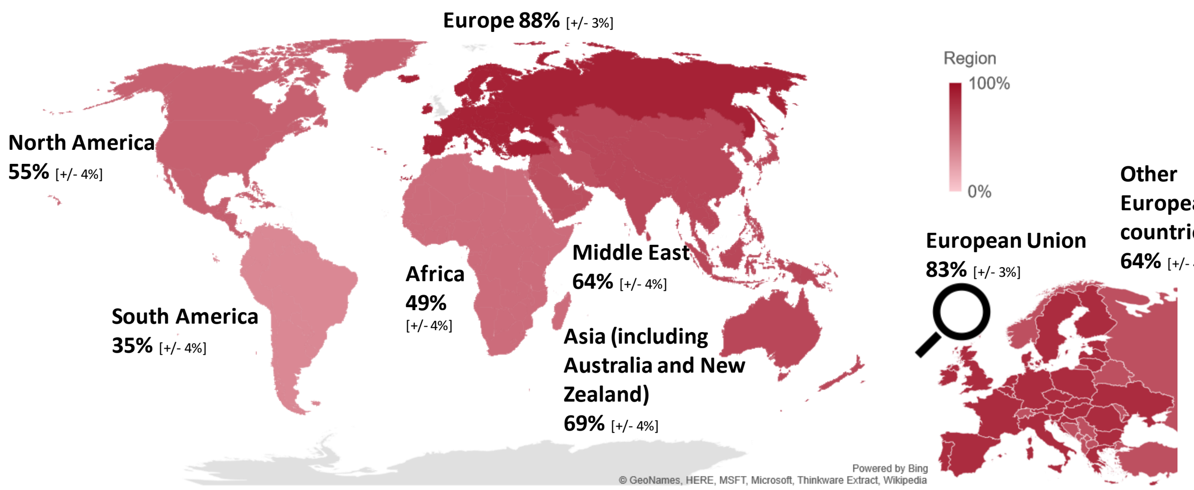
These findings are based on interviews with 748 businesses that used the Posts service in April 2018 to March 2019. Two-thirds (69%) sold goods overseas and around half (48%) services (51% only sold goods, 31% only sold services and 17% both).

Service delivery data entry practices differs 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.

3.6.1 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 (83%) have sold within the European Union and just under two-thirds (64%) sold within the rest of Europe. Two-thirds sold goods or services in Asia (69%) or the Middle East (64%). Over half sold within North America (55%) and 49% in Africa. The least common area was South America with 35% of exporting businesses selling there.

Chart 3.6.1 Regions organisations reported exporting to or exported to previously – Posts



Europe	88% [+/- 3%]
Asia (including Australia and New Zealand)	69% [+/- 4%]
Middle East	64% [+/- 4%]
North America	55% [+/- 4%]
Africa	49% [+/- 4%]
South America	35% [+/- 4%]

European Union	83% [+/- 3%]
Other European countries	64% [+/- 4%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Posts and who have exported (630)

Larger businesses (in terms of number of employees and annual turnover) were more likely to export to multiple regions, as were businesses that sold goods or services online and those who had a longer relationship with DIT or had been in business for longer.

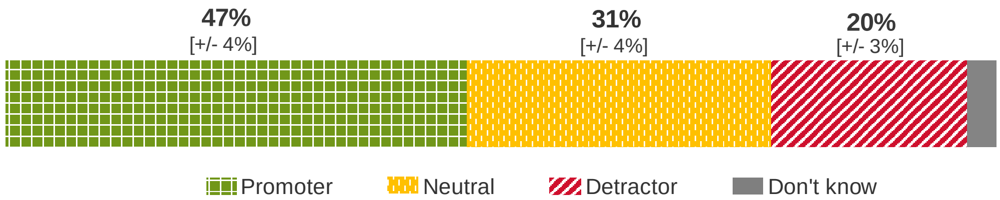
3.6.2 Service performance: Posts

The perceived performance of Posts and the service it provides was explored with the business's overall perceptions of the service, their views on specific aspects of advice and support provided and any actions the business reported taking as a result of using the service.

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) and are assigned a Net Promoter Score. Around half of businesses (47%) were "Promoters" (scores of nine and ten), while 20% were "Detractors" (scores of zero to six) and 31% were neutral (scores of seven and eight). Chart 3.6.2 provides details. Overall, Posts had an NPS score of 27.

Chart 3.6.2 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 (748)

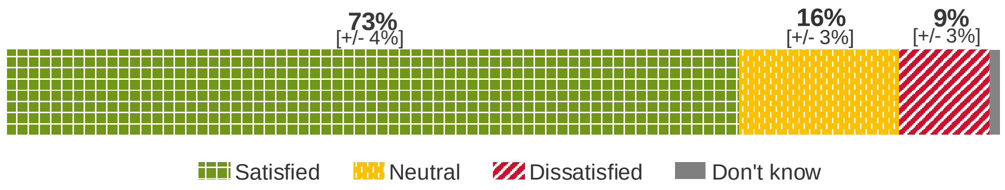
Businesses were asked about ways they thought Posts **could be improved.** Staff was the most frequently reported area for improvement (15%) and was most commonly mentioned in terms of more knowledgeable staff (six per cent). Other reported areas for improvement were around service (14%), including quicker services and processes (four per cent), information (12%), support (12%) and communication (12%).

Businesses were also asked **how satisfied they were** with the overall experience of using the service by rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[25].

Seven in ten businesses (73%) that used the service were satisfied with their overall experience (rating it of seven out of ten or higher), including 22% 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). Nine per cent were dissatisfied with their overall experience (giving a rating of three or lower).

[25] 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 – 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 (725)

The 62 businesses that reported that they were dissatisfied with their experience of the service overall were asked an open question about why they were dissatisfied. This was then coded to a pre-defined list of options (Table 3.6.1). The most frequent **reasons for dissatisfaction** were that the service did not do anything for the business or did not help (41%) or that that the service had poor communication, lack of follow up or lack of feedback (29%). DIT not giving enough information or advice was another reason for dissatisfaction (23%), as well as not enough contact (14%). Ten per cent said there was a poor quality of business opportunities or tenders.

Table 3.6.1 Reasons for dissatisfaction with service – Posts

Reasons for dissatisfaction	
	%
Did not do anything/did not help	41
Poor communication/lack of follow up/feedback	29
Did not give enough information/advice	23
DIT did not have enough contact with me	14
Poor quality of business opportunities or tenders	10
Service not relevant to my needs	8
Poor quality of contacts	7

Qwhydis - And why do you say you were dissatisfied? Table is restricted to answers given by more than 4% of respondents. Base: All businesses using Posts who were dissatisfied with the service (62).

Perceptions of advice and support

Businesses were asked to rate the advice and support they received from Posts.

All respondents were asked **what happened when the organisation used the service** (Chart 3.6.4). The chart shows the activities that are most relevant to Posts[26].

Looking at the activities that are most relevant to Posts, over two-thirds (68%) of businesses attended a one to one meeting or received one to one advice over the phone as a result of the service, six in ten (63%) were provided with new business contacts or export opportunities, or attended an event, trade fair or mission (58%). Half (53%) were referred to use other DIT services,

[26] 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.

four in ten (43%) looked for further information or used online services on the DIT or Great.gov.uk website, and 37% were referred by DIT to the services of another organisation. A quarter of businesses applied for finance or funding (25%) or attended a course or webinar (23%) as a result of using the service. Three per cent of businesses said that they took no action as a result of using Posts.

Chart 3.6.4 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 (748)

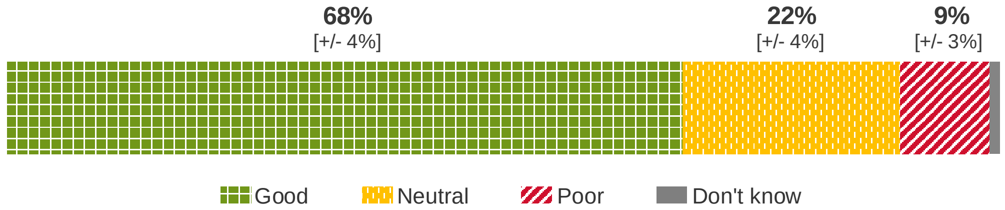
Businesses that only sold goods overseas were more likely than businesses that only sold services overseas to have applied for finance or funding (28% compared with 17%). Businesses with a turnover of under £10 million were more likely than those with a turnover of £10 million or more to have applied for finance or funding (27% compared with 17%). Businesses with a turnover of £10 million or more were more likely to have attended an event, trade fair or mission (64% compared with 54%), or been referred by DIT to the services of another organisation (42% compared with 32%).

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 (28%). Twenty-three per cent received market information about competition specific to their products or services, 17% received an analysis of suppliers, and 16% 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).

Two-thirds (68%) rated Posts as good at meeting their needs (a score of seven or more out of ten). One in ten (nine per cent) businesses rated the service negatively when asked how it met their needs (a score of three or below), while two in ten (22%) businesses were neutral (a score between four and six) (Chart 3.6.5).

Chart 3.6.5 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 Posts, except those giving a 'not applicable' answer (721)

Businesses were also asked to **rate their experience of the advice and support they received** from Posts. A detailed breakdown of the criteria businesses rated is shown in Table 3.6.2 and Chart 3.6.6 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six are labelled as neutral, and zero to three are marked as negative.

Businesses were most likely to be satisfied with staff knowledge (77%), the amount of time taken to receive information (75%) and the external handover (75%). Two-thirds of businesses gave a positive rating for how comprehensive the information they received from the service was (67%), the quality of contacts they were provided with (67%) and how clear the steps were that they needed to take when using the service (66%). One in six (59%) businesses were satisfied with how clear the steps were that they needed to take after using the service.

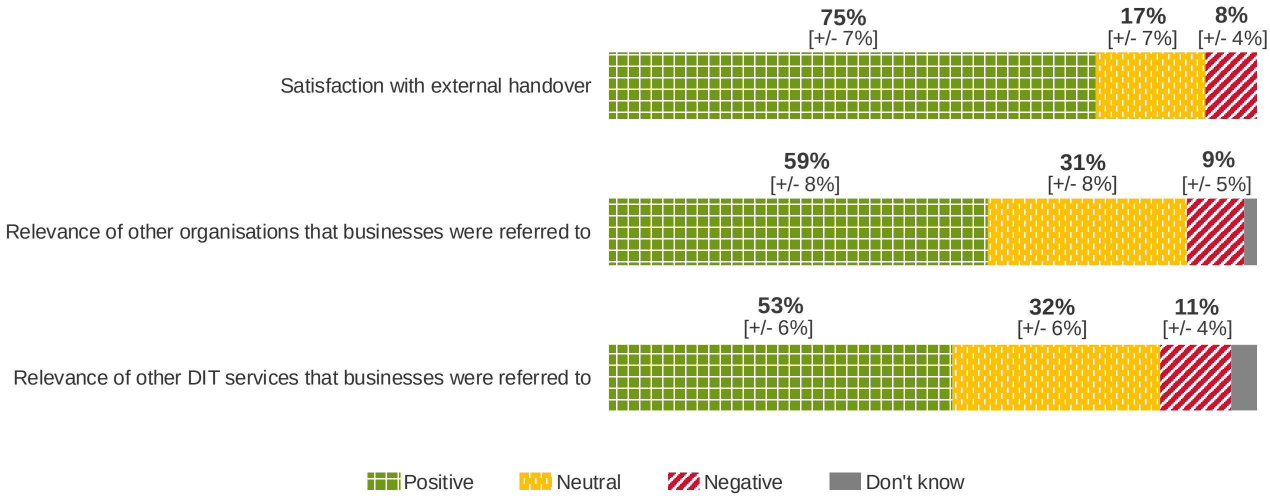
Table 3.6.2 Rating by businesses of the specific advice and support - Posts

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
Rating of staff knowledge	**77%** [+/- 2%]	**16%** [+/- 3%]	**5%** [+/- 2%]
Amount of time take to receive information	**75%** [+/- 4%]	**17%** [+/- 3%]	**8%** [+/- 2%]
How comprehensive was the information that they received	**67%** [+/- 4%]	**25%** [+/- 4%]	**8%** [+/- 3%]
Quality of contacts they were provided with	**67%** [+/- 4%]	**23%** [+/- 4%]	**9%** [+/- 3%]
How clear were the steps they needed to take when using the service	**66%** [+/- 4%]	**23%** [+/- 4%]	**10%** [+/- 2%]
How clear were the steps they needed to take after using the service	**59%** [+/- 4%]	**27%** [+/- 4%]	**13%** [+/- 3%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (695). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (704). Qclarity_1 - The service made clear the steps I needed to take when I was using it (680). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (692). Qclarity_2 - The service made clear what I should do next after using it (679). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (666) Base: All respondents that used each service, except those giving a 'not applicable' answer

Businesses that exported online were more likely to rate the quality of contacts received as poor (14% compared with six per cent that do not export online).

Chart 3.6.6 Rating by businesses of handovers and referrals - Posts

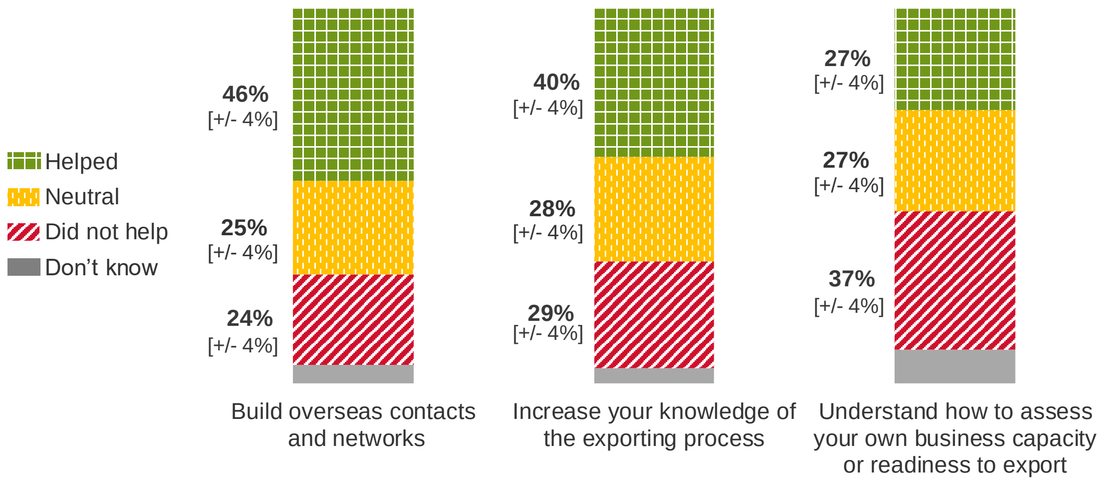


Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (266) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (387). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (266) Base: All respondents that used each service, 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 3.6.7 shows the items that were asked of businesses that used Posts. This shows that:

- Just under a half (46%) of businesses agreed that the service helped them to build overseas contacts and networks, while a quarter (24%) of businesses did not think the service helped in this way.
- Four in ten (40%) businesses agreed that the service helped the business to increase their knowledge of the exporting process, while 29% did not think it helped them in this way.
- A quarter (27%) of businesses agreed that the service helped the business to understand how to assess their own business capacity or readiness to export, while 37% did not think the service helped in this way.

Chart 3.6.7 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 (748)

Businesses that only sold services overseas (54%) were more likely than those selling only goods overseas (37%) to say that the service helped them to build overseas contacts and networks.

Actions taken by businesses as a result of service delivery

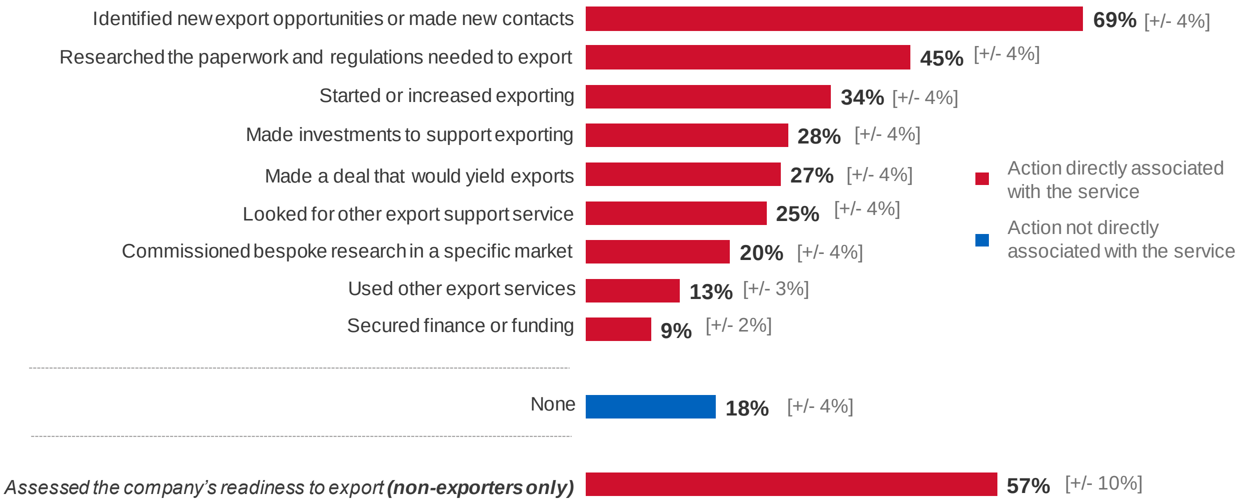
A series of questions explored what actions businesses reported having taken as a result of their interaction with Posts. These questions examined additional support received, investments made by the business as a result of using the service, any business opportunities they identified, and contacts made through the service.

Using a list of pre-determined options, businesses were asked to say what they had done as a result of using the service. Chart 3.6.8 shows the actions that businesses may have taken[27].

Businesses were most likely to say they had identified new export opportunities or made new contacts (69%), assessed the company's readiness to export[28] (57% of non-exporters),researched the paperwork and regulations needed to export (45%), while a third started or increased exporting (34%). Around a quarter made investments to support exporting (28%), made a deal that would yield exports (27%) or looked for other export support services (25%). Two in ten (20%) commissioned bespoke research in a specific market and one in ten (13%) used other export services or assessed their company's readiness to export (12%). The full list of responses is shown in Chart 3.6.8.

[27] 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.
[28] This is only for businesses that were not exporting at the time of using the service.

Chart 3.6.8 Actions taken as a result of service delivery– Posts

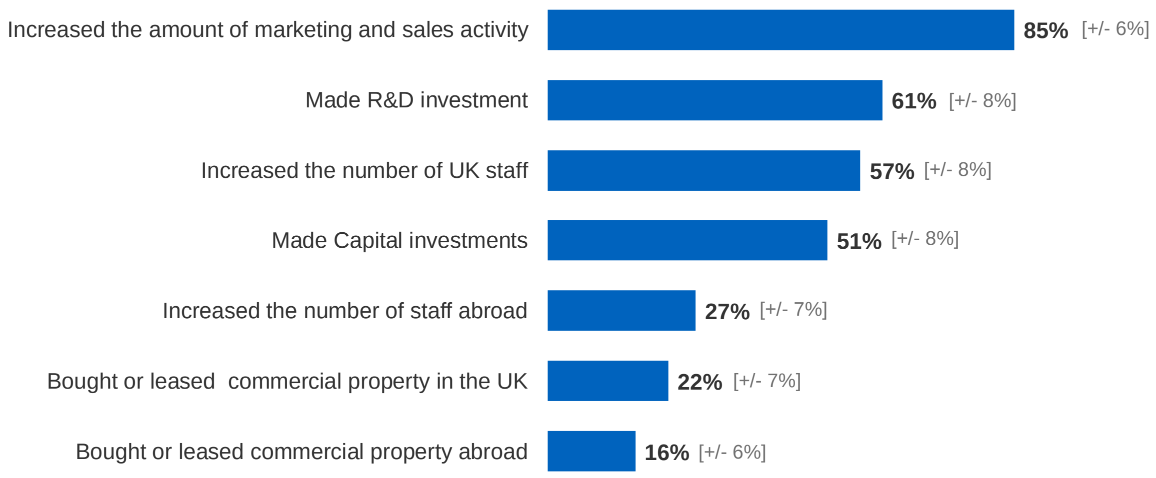


Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used Posts (748). Non-exporters (157)

Micro businesses (with fewer than ten employees) were the most likely to have assessed their company's readiness to export (20%) compared to all other size of business by employee size. Businesses that were new to exporting were more likely that exporters to have commissioned bespoke research (30% compared with 19% of exporters),or assessed the company's readiness to export (58% compared with three per cent).

The businesses that reported they had made investments to support exporting as a result of using Posts (209 businesses) were asked to specify the **type of investment** that they had made. Most businesses that had made investments to support exporting had increased the amount of marketing and sales activity that they were undertaking (85%). Six in ten of these businesses made Research and Development (R&D) investments (61%), while more than half had increased the number of UK staff (57%) or made capital investments (51%), as shown in Chart 3.6.9.

Chart 3.6.9 Type of investments made - 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 (209)

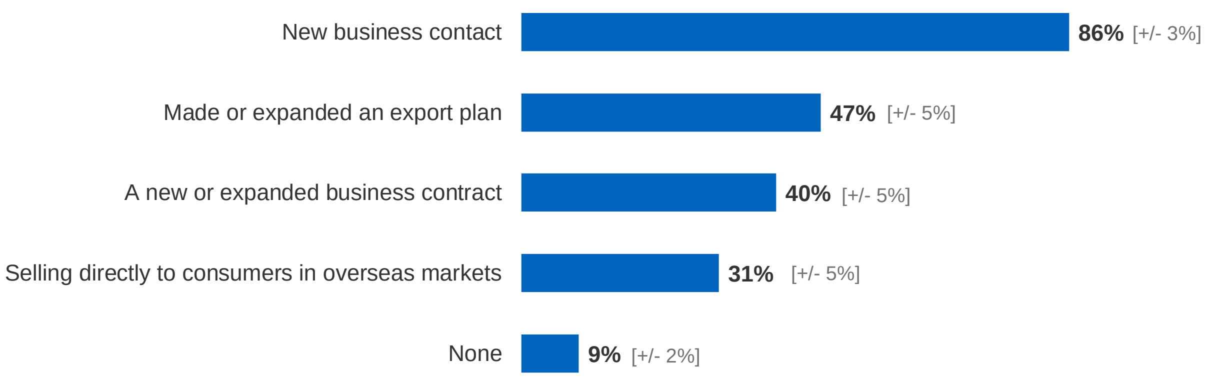
Businesses that only sold services overseas were more likely than business that only sold goods to have increased the number of staff abroad (35% compared with 13%), or bought or leased commercial property abroad (24% compared with six per cent).

Businesses that had contacted only DIT to support exporting (44%) were less likely than businesses who had contacted DIT and other government departments (64%) or DIT and the private sector (73%) to have made any R&D investment.

Businesses that reported having identified new export opportunities or having made new contacts (571 businesses) were asked what kind of opportunities they had identified (Chart 3.6.10).

The majority (86%) of businesses identified new business contacts. Businesses also made or expanded their export plans (47%), developed a new or expanded business contract (40%) or sold directly to consumers in overseas markets (31%).

Chart 3.6.10 Opportunities identified – Posts



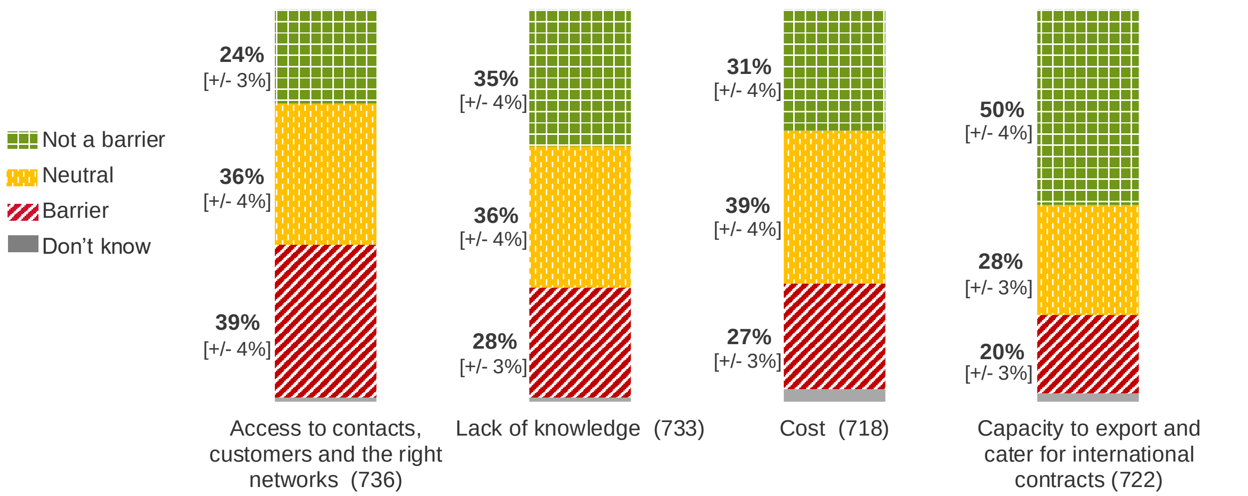
Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 2% of respondents. Base: All respondents that used Posts who had identified a new business contact as part of the DIT service (571)

Barriers to exporting

Businesses were asked about four **potential barriers for their business in relation to exporting** and 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) (Chart 3.6.11).

Nearly four in ten (39%) businesses indicated that access to contacts, customers and the right networks was a barrier to exporting, including five per cent who thought this was a very strong barrier (a score of ten out of ten). Lack of knowledge was reported to be a barrier by 28% of businesses, and cost by 27%. Fewer businesses reported the capacity of their business to export and cater for international contacts as a barrier (20%).

Chart 3.6.11 Barriers to exporting - Posts



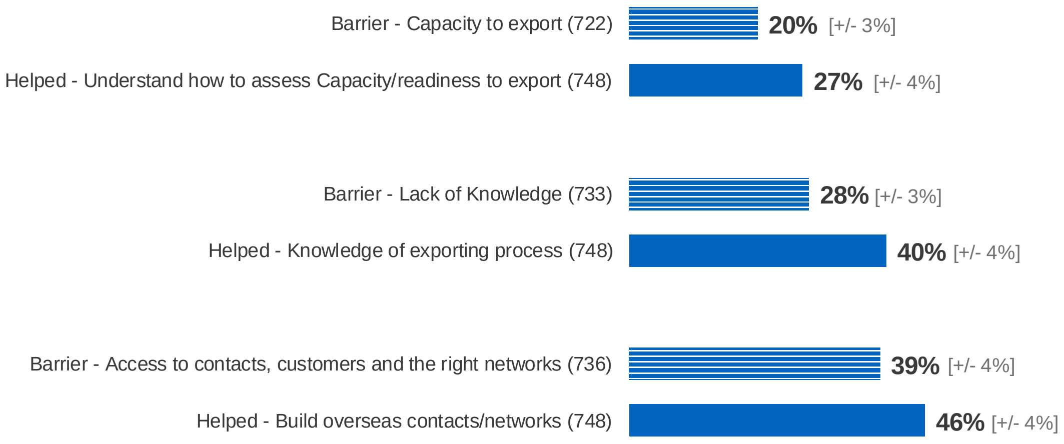
Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Posts, except those giving a 'not applicable' answer

Businesses with fewer than 50 employees (43%) were more likely than businesses with 50 employees or more (30%) to say that access to contacts, customers and the right networks was a barrier. Businesses that export online were more likely than business that do not to say that cost was a barrier (34% compared with 24%), as well as lack of knowledge (34% compared with 24%). Businesses that had used DIT services for more than five years were the most likely to say that lack of knowledge was not a barrier (42%) compared with businesses that had used the service for the first time (32%), less than a year (35%), or between one and five years (30%).

Chart 3.6.12 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 export opportunities and building overseas contacts and networks).

Two in ten (20%) businesses said that capacity to export was a barrier and more than a quarter said that Posts helped them to understand how to access capacity or readiness to export. Around three in ten (28%) business said lack of knowledge was a barrier to exporting, and four in ten (40%) 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 just under half (46%) said that the service helped them to build overseas contacts or networks.

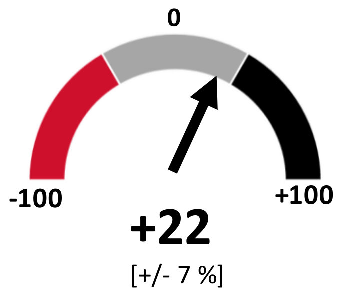
Chart 3.6.12 Barriers to exporting and how DIT helped – Posts



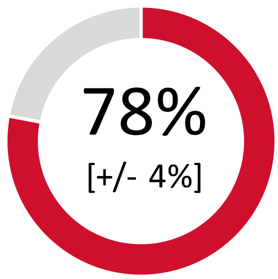
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Posts, except those giving a 'not applicable' answer
Qknowchange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

Summary page – Sector Teams

Net Promoter Score

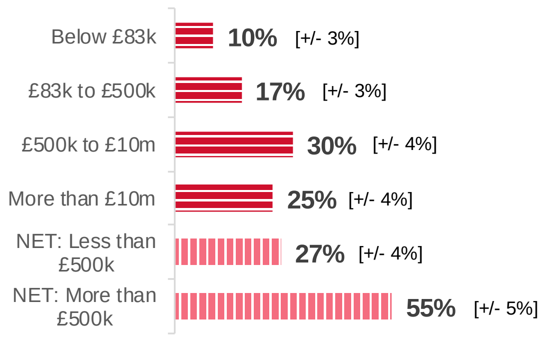


Satisfaction with service

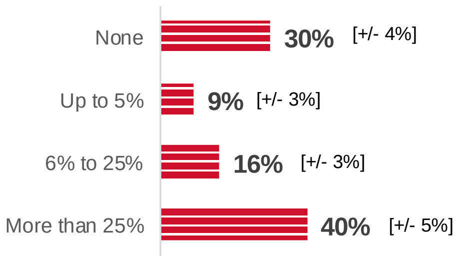


Turnover

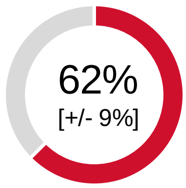
Turnover



% of turnover from exporting

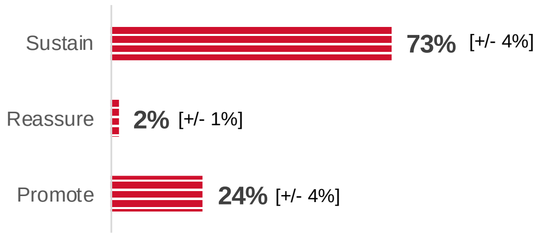


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

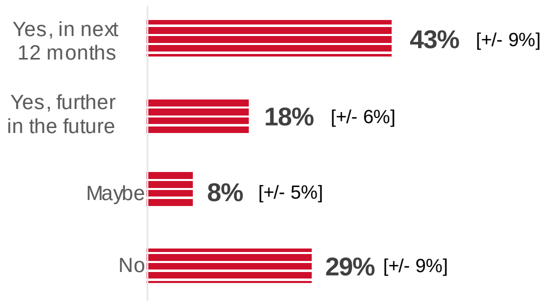


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.7 Sector teams

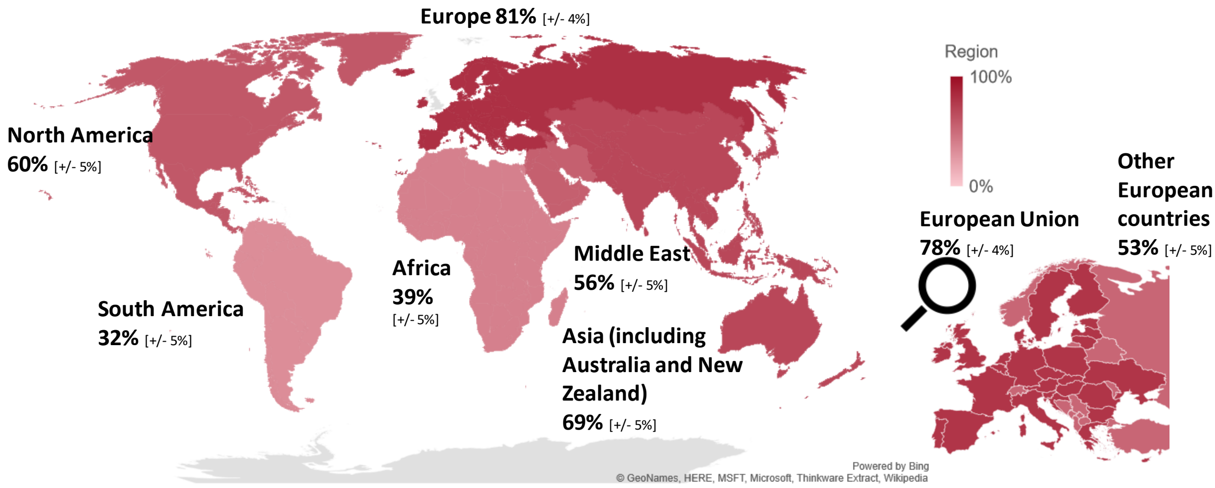
DIT's sector teams work to maximise the supply of export ready UK companies. They work directly with industry and the international network to facilitate collaboration between UK businesses, co-ordinate government to government engagement, and support trade missions.

These findings are based on interviews with 522 businesses that used Sector Teams in April 2018 to March 2019[29]. Half (49%) sold goods overseas and over two-thirds (66%) services (33% only sold goods, 50% only sold services and 16% both).

3.7.1 Sector Teams: Business export status

In total, 71% of businesses currently export by selling goods or services or have done previously. Of these, three-quarters (78%) sold within the European Union and just under half (52%) sold within the rest of Europe. Two-thirds sold goods or services in Asia (69%). Over half sold goods in North America (60%) and the Middle East (56%). Around a third sold within Africa (39%) and South America (32%).

Chart 3.7.1 Regions organisations reported exporting to or exported to previously – Sector Teams



Europe	81% [+/- 4%]
Asia (including Australia and New Zealand)	69% [+/- 5%]
North America	60% [+/- 5%]
Middle East	56% [+/- 5%]
Africa	39% [+/- 5%]
South America	32% [+/- 5%]

European Union	78% [+/- 4%]
Other European countries	53% [+/- 5%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Sector Teams and who have exported (403)

3.7.2 Service performance: Sector Teams

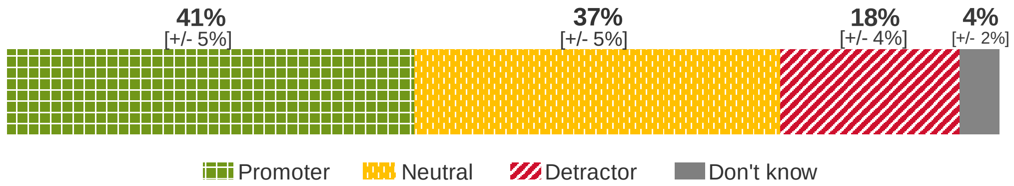
The perceived performance of Sector Teams and the service they provide was explored with the business's overall perceptions of the service, their views on specific aspects of advice and support provided by the website, and any actions the business reported taking as a result of using Sector Teams.

[29] 24 businesses that used Defence and Security Organisation services have been included in the Sector Teams service.

Overall perceptions of service

Businesses were asked based on their experience of 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 this question on a scale from ten (extremely likely) to zero (not at all likely) and are assigned a Net Promoter Score. Four in ten businesses (41%) were "Promoters" of Sector Teams (scores of nine and ten), while one in five (18%) were "Detractors" (scores of zero to six) and 37% were neutral (scores of seven and eight). Chart 3.7.2 provides details. Overall, Sector Teams had a positive NPS score of 22.

Chart 3.7.2 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 (522)

Businesses were asked about ways they thought Sector Teams **could be improved.**

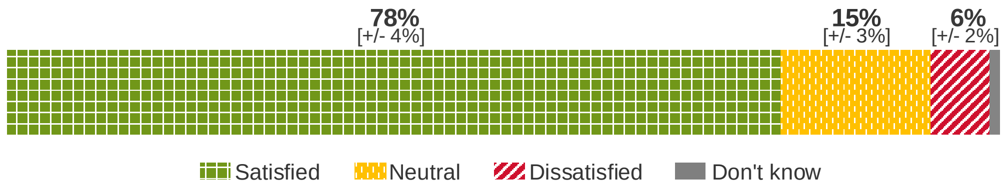
Businesses were generally positive about how they thought the service could be improved with a quarter (250%) saying that nothing would improve it. The most commonly cited area for improvement was the service itself (12%), which included responses referencing quicker service/processes (3%), promoting the service better (3%) and other service improvements (7%). Staff was an equally common cited as an area for improvement (12%), including more knowledgeable staff (4%), more varied advisors (4%), and better understanding of the markets / current climate (3%). Similarly, communication (12%), including 8% who suggested more feedback / follow up would improve the service and better / more communication (4%). Information (10%) was an area for improvement, with six percent citing better / more information and more specific / tailored information (3%).

Businesses were also asked **how satisfied they were** with the overall experience of using the service by rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[30].

Eight in ten (78%) businesses that used the service were satisfied with their overall experience (rating it of seven out of ten or higher), including 17% per cent of businesses that were very satisfied (giving a rating of ten out of ten). One in seven (15%) businesses were neither satisfied nor dissatisfied (giving a rating of between four and six). Six per cent of businesses were dissatisfied with their overall experience (giving a rating of three or lower) and this included one per cent of businesses that were very dissatisfied (giving a rating of zero).

[30] 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 – 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 (500)

Satisfaction with the service varied between business size, with larger businesses being more satisfied compared with small and medium sized businesses; 88% of businesses with more than 250 employees were satisfied compared with 69% of micro businesses (with between zero and nine employees). Businesses using the service for the first time were more dissatisfied compared to businesses who had been using the service for between one and five years (13% compared with three per cent).

The 31 businesses that reported that they were dissatisfied with their experience of the service overall were asked an open question about why they were dissatisfied. This was then coded to a pre-defined list of options by the interviewer. The most frequent **reasons for dissatisfaction** were that the service did not do anything to help (12 responses) or give enough information or advice (11 responses). DIT not having enough contact with businesses was another reason for dissatisfaction (eight responses).

Perceptions of advice and support

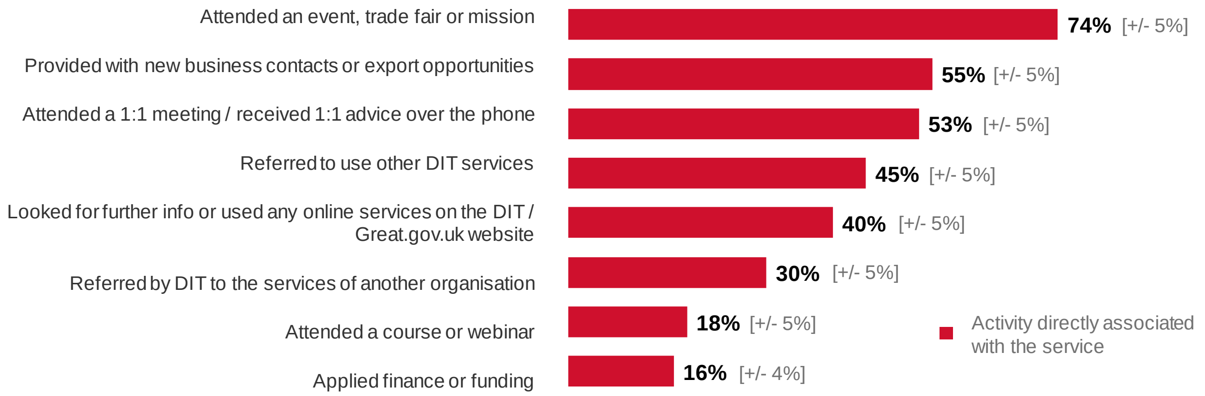
Businesses were asked to rate the advice and support they received from Sector Teams.

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 Sector Teams[31].

Three in four businesses (74%) attended an event or trade fair or mission as a result of using the service and just over half (55%) were provided with new business contacts or export opportunities or attended a one-to-one meeting or received one-to-one advice over the phone as a result of using the service (53%). Over two-fifths (45%) were referred to use other DIT services or looked for further information or used online services on the DIT or Great.gov.uk website (40%) and a third (30%) referred by DIT to the services of another organisation. Around a sixth attended a course or webinar (18%) or applied for finance or funding (16%).

[31] 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 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 (522)

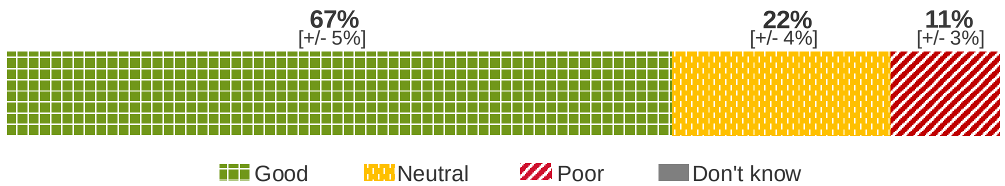
Businesses that only sold goods overseas were more likely than businesses that only sold services overseas to have attended a 1:1 meeting or received 1:1 advice over the phone (65% compared to 46%). Businesses that only sold goods were more likely than businesses that only sold services to have been referred to use other DIT services (53% compared to 38%). Similarly, businesses that only sold goods were more likely than business that only sold services to have applied for finance or funding (26% compared to 10%).

When asked which **specific types of support** they received as part of Sector Teams, 18% said they received an off-the-shelf overview for existing markets and sectors, 13% received market information about competition specific to their products or services or received advocacy, lobbying, or support for a bid (13%). One in ten received tailored 'route to market' information (12%).

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).

Seven in ten (67%) businesses rated Sector Teams as good at meeting their needs (a score of seven or more out of ten). One in ten (11%) businesses rated the service negatively when asked how it met their needs (a score of 3 or below), while one in five (22%) of businesses were neutral (a score between four and six) (Chart 3.7.5).

Chart 3.7.5 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 (490)

Ratings were broadly consistent across business size and turnover. Businesses that only sold goods overseas were more likely to say that the extent the service met their needs was good than businesses that only sold services overseas (73% compared to 59%).

Businesses were also asked to **rate their experience of the advice and support they received** from Sector Teams. A detailed breakdown of the criteria businesses rated is shown in Table 3.7.1 and Chart 3.7.6 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six are labelled as neutral, and zero to three are marked as negative.

Businesses were most likely to be satisfied with how straight forward the registration process was (89%). Businesses highly rated the service organisation (87%) and the knowledge of the staff (84%). Seven in ten businesses were satisfied with how comprehensive the information they received from the service was (71%) and the amount of time taken to receive information (69%). Two-thirds of businesses were satisfied with how clear the steps they needed to take when using the service (68%) and quality of contacts they were provided with (66%). Just over half of businesses were satisfied with how clear the steps were that they needed to take after using the service (55%). No more than one in ten businesses were dissatisfied with the specific advice and support provided by Sector Teams.

Table 3.7.1 Rating by businesses of the specific advice and support - Sector Teams

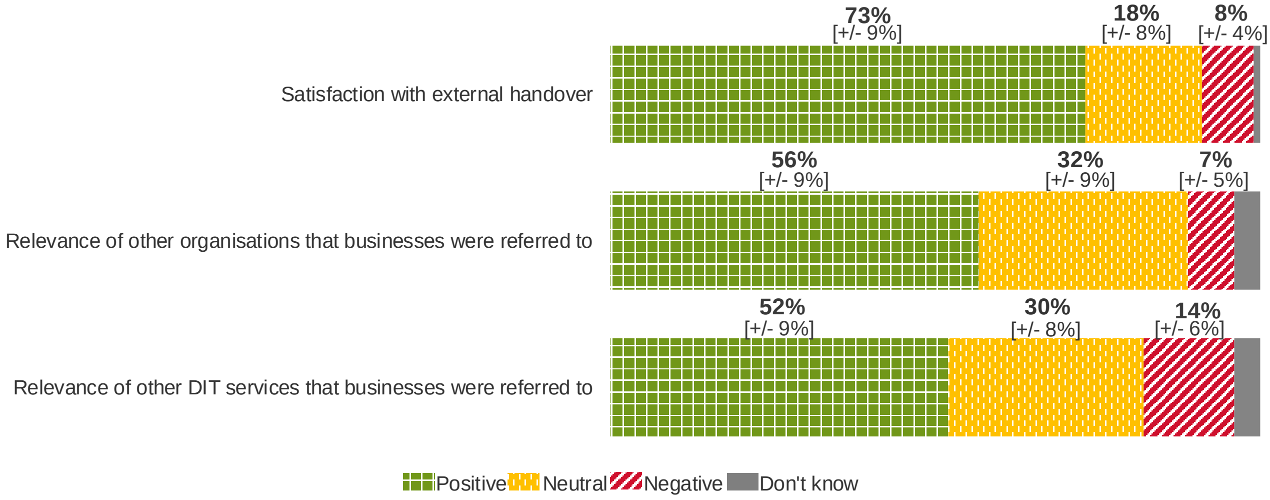
Rating by businesses of the specific advice and support	Positive	Neutral	Negative
How straight forward was the registration for the service	**89%** [+/- 3%]	**5%** [+/- 2%]	**5%** [+/- 2%]
Rating of organisation of the service	**87%** [+/- 3%]	**9%** [+/- 3%]	**3%** [+/- 2%]
Rating of staff knowledge	**84%** [+/- 3%]	**11%** [+/- 3%]	**3%** [+/- 2%]
How comprehensive was the information that they received	**71%** [+/- 4%]	**21%** [+/- 4%]	**6%** [+/- 2%]
Amount of time take to receive information	**69%** [+/- 5%]	**22%** [+/- 5%]	**7%** [+/- 2%]
How clear were the steps they needed to take when using the service	**68%** [+/- 5%]	**23%** [+/- 4%]	**7%** [+/- 2%]
Quality of contacts they were provided with	**66%** [+/- 5%]	**23%** [+/- 5%]	**9%** [+/- 3%]
How clear were the steps they needed to take after using the service	**55%** [+/- 6%]	**33%** [+/- 5%]	**10%** [+/- 3%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (499). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (496). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (450). Qclarity_1 - The service made clear the steps I needed to take when I was using it (469). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (447). Qclarity_2 - The service made clear what I should do next after using it (454). Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (464). Qevent - How would you rate the organisation of the [SAMPLED SERVICE]? (478). Base: All respondents that used Sector Teams, except those giving a 'not applicable' answer

Businesses that only sold goods were more likely than businesses that only sold services to report that the comprehensiveness of the information that they received was good (80% compared to 63%).

Seven in ten (73%) businesses were satisfied with the external handover. Over half of businesses (56%) were positive about the relevance of other organisations that they were referred to with. A similar amount were positive about the relevance of other DIT services that they were referred to (52%). There were no differences between business types.

Chart 3.7.6 Rating by businesses of handovers and referrals – Sector Teams

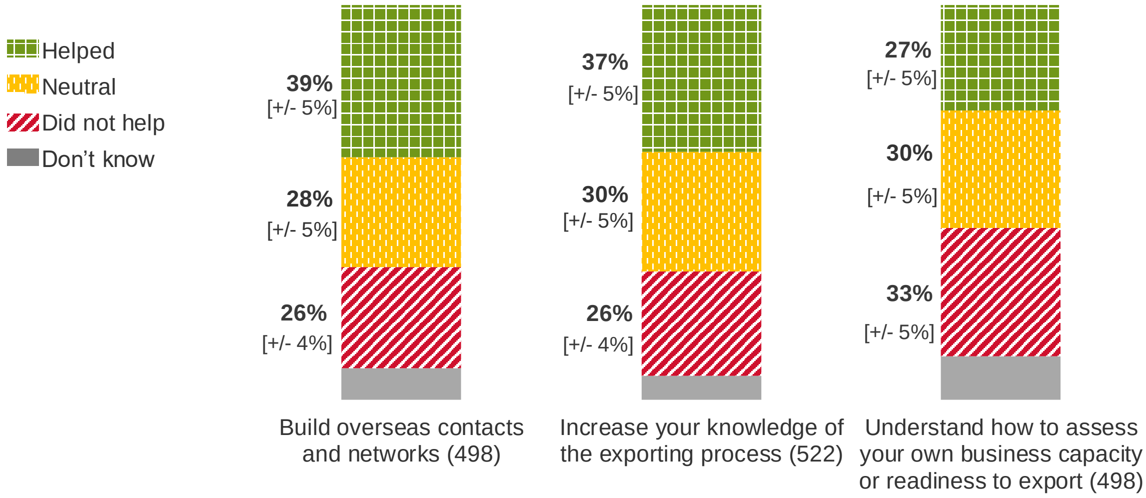


Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (161) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (219). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (163). Base: All respondents that used Sector Teams, 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 3.7.7 shows the items that were asked of businesses that used Sector Teams. This shows that:

- Four in ten (39%) of businesses agreed that the service helped them to build overseas contacts and networks, while a quarter (26%) of businesses did not think the service helped in this way.
- Similarly, nearly four in ten (37%) businesses agreed that the service helped the business to increase their knowledge of export opportunities available, while 26% did not think it helped them in this way.
- A quarter (27%) 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.

Chart 3.7.7 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

Businesses that have attended a UK event were more likely than businesses that attended an overseas event to say that Sector Teams helped them increase their knowledge of the exporting process (43% compared to 23%).

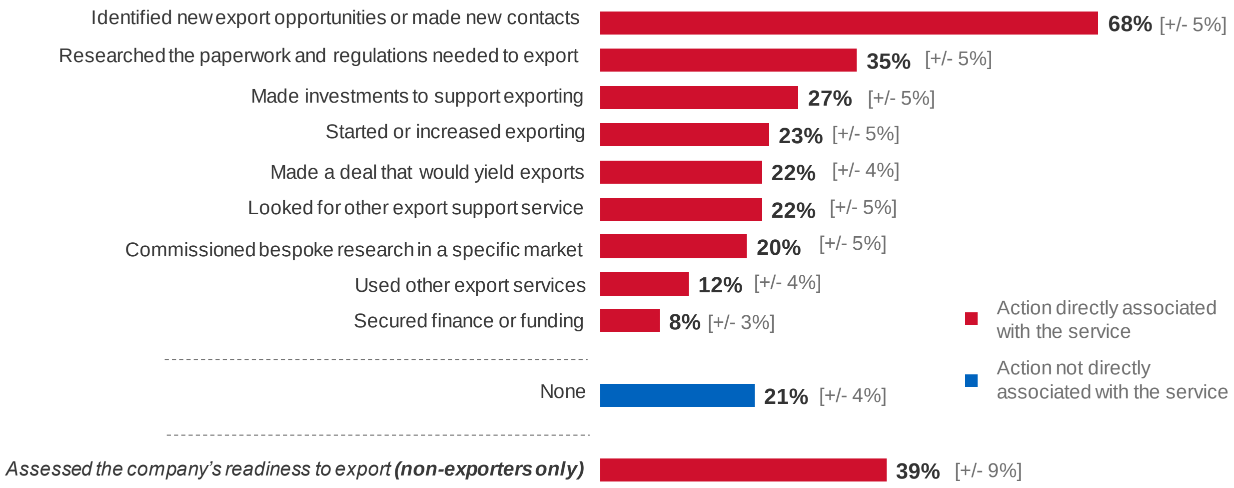
Actions taken by businesses as a result of service delivery

A series of questions explored what actions businesses reported having taken as a result of their interaction with Sector Teams. These questions examined additional support received, investments made by the business as a result of using the service, any business opportunities they identified, and contacts made through the service.

Using a list of pre-determined options, businesses were asked to say what they had done as a result of using the service. Chart 3.7.8 shows the actions that businesses may have taken.

Businesses were most likely to say they identified new export opportunities or made new contacts (68%). Four in ten (39%) businesses that were not exporting at the time of using the service had assessed the company's readiness to export. A third of all businesses had researched the paperwork and regulations needed to export (35%), while around a quarter had made investments to support exporting (27%), started or increased exporting (23%) or made a deal that would yield exports (22%). One in five had looked for other export services (22%) or commissioned bespoke research in a specific market (20%).

Chart 3.7.8 Actions taken as a result of service delivery– Sector Teams

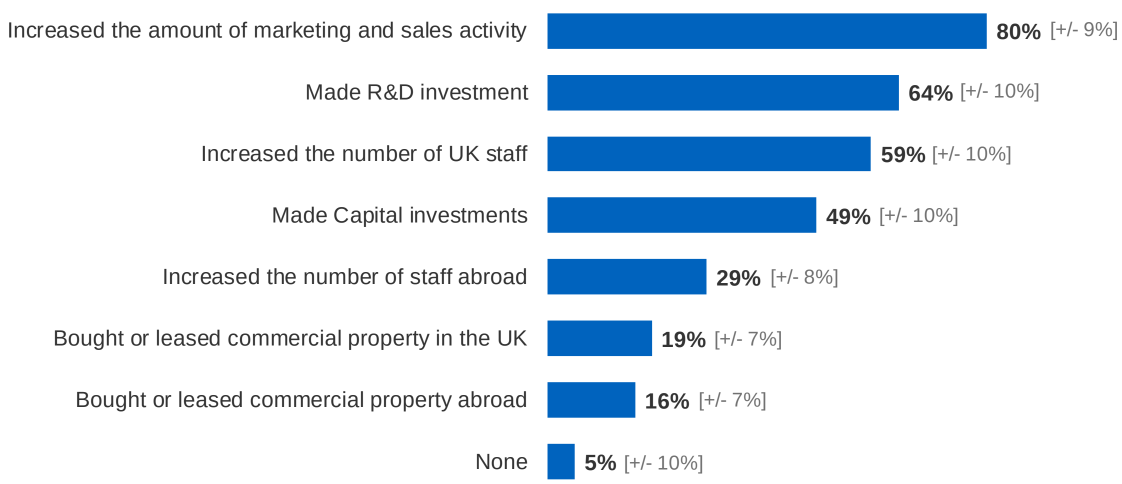


Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used Sector Teams (522). Non-exporters (144)

Businesses that had used DIT services for between one and five years were more likely than businesses that were using the service for the first time to have identified new export opportunities or made new contacts (76% compared to 56%), researched the paperwork and regulations needed to export (40% compared to 22%) and started or increased exporting (23% compared to nine per cent).

The businesses that reported they had made investments to support exporting as a result of using Sector Teams (143 businesses) were asked to specify the **type of investment** that they had made. As shown in Chart 3.7.9, four in five businesses (80%) that had made investments to support exporting had increased the amount of marketing and sales activity that they were undertaking. Three in five had made Research and Development (R&D) investments (65%) or increased the number or UK staff (59%).

Chart 3.7.9 Type of investments made – Sector Teams

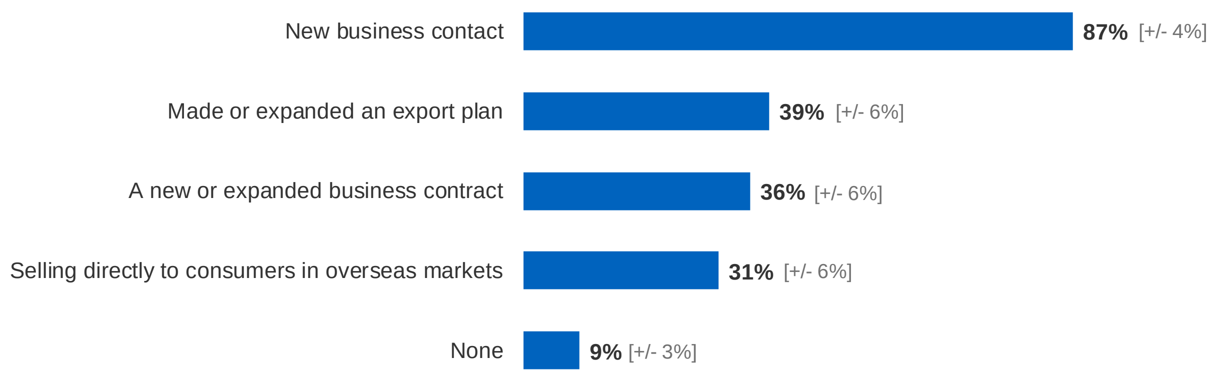


Qresult_invest - Which of the following investments has your business made to support new or increased export opportunities? IF NECESSARY: Please only think about investments relating to export activity. Table is restricted to answers given by more than 2% of respondents. Base: All respondents who had used Sector Teams and had made investments to support exporting (143)

Businesses that reported having identified new export opportunities or having made new contacts (386 businesses) using Sector Teams were asked what kind of opportunities they had identified (Chart 3.7.10).

Around nine in ten (87%) businesses identified new business contacts. A third of businesses made or expanded their export plans (39%), developed a new or expanded business contract (36%), sold directly to consumers in overseas markets (31%).

Chart 3.7.10 Opportunities identified – 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 had used Sector Teams and identified an opportunity as a result (386)

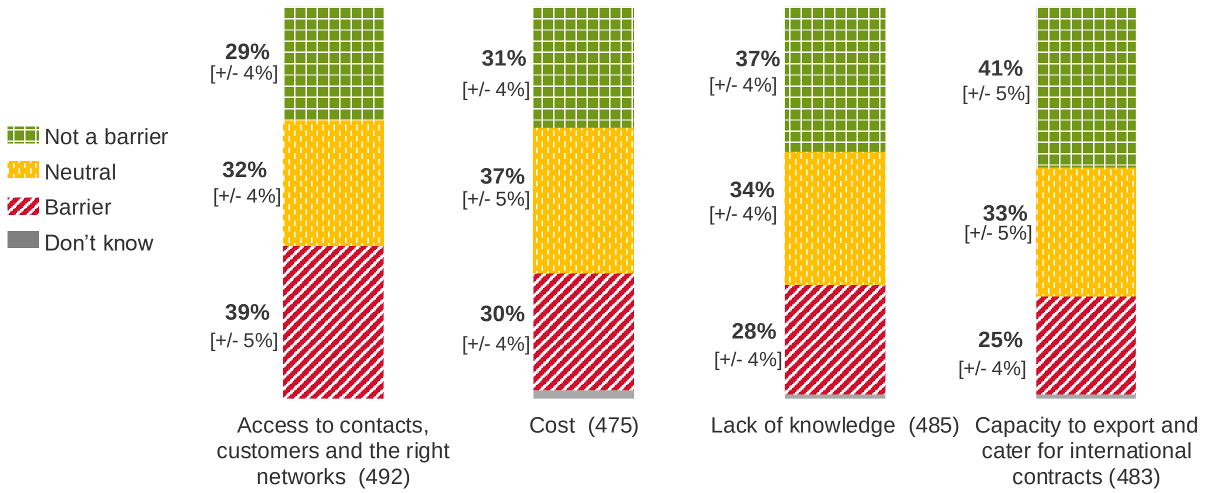
Businesses that made a new business contact as a result of service (331 businesses) were asked **what contacts the organisation had used** from a list asked by the interviewer. Half of businesses (51%) had made contact with a buyer, a quarter (25%) had made contact with a distributor and one in five (20%) had made contact with an agent.

Barriers to exporting

Businesses were asked about four **potential barriers for their business in relation to exporting** and 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) (Chart 3.7.11).

Two-fifths (39%) of businesses indicated that access to contacts, customers and the right networks was a barrier to exporting, including five per cent who thought this was a very strong barrier (a score of ten out of ten). Cost and lack of knowledge (30% and 28% respectively) were also reported as barriers by three in ten businesses. A quarter (25%) of businesses reported the capacity of their business to export and cater for international contacts as a barrier, including 12% who thought this was not a barrier at all (a score of zero out of ten).

Chart 3.7.11 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

Businesses that were using the service for the first time were more likely than businesses that have been using it for between one and five years to say that a lack of knowledge was a barrier to exporting (45% compared to 26%). Businesses that had a turnover of less than £500,000 were more likely to say that the capacity of their business to export and cater for international contracts was a barrier to exporting compared with businesses with a turnover of £500,000 or more (34% compared with 19%). Businesses with a turnover of below £5 million were more likely than businesses with a turnover of £50 million or more to report that access to contacts, customers and the right networks was a barrier to exporting (44% compared with 27%).

Chart 3.7.12 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).

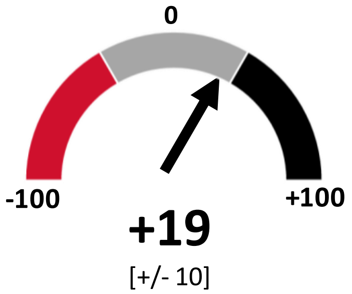
A four in ten businesses (39%) said that a lack of access to contacts, customers, and the right networks was a barrier to exporting, whilst an equal amount (39%) said that Sector Teams helped them build contacts and networks. A quarter (28%) of business said that a knowledge was a barrier to exporting and 37% said that DIT helped them increase their knowledge of the exporting process. A quarter of businesses (25%) stated that a lack of capacity to export and cater for international contracts was a barrier to exporting and 27% said that Sector Teams helped them understand how to assess their business capacity or readiness to export.

Chart 3.7.12 Barriers to exporting and how DIT helped - Sector Teams

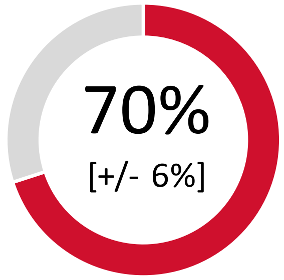
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Sector Teams, except those giving a ‘not applicable’ Qknowchange - Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to…Increase your knowledge of export opportunities available / Build overseas contacts and networks. Base: All respondents who used Sector Teams

Summary page – Webinars

Net Promoter Score

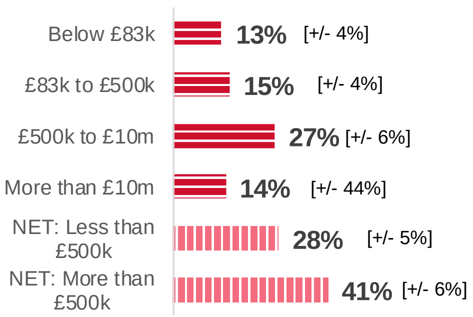


Satisfaction with service

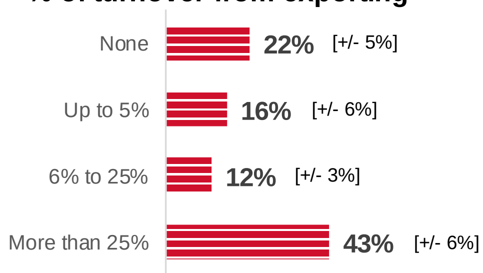


Turnover

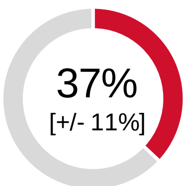
Turnover



% of turnover from exporting

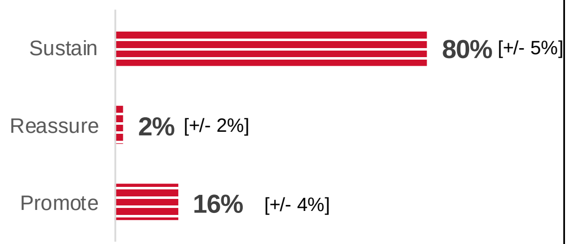


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

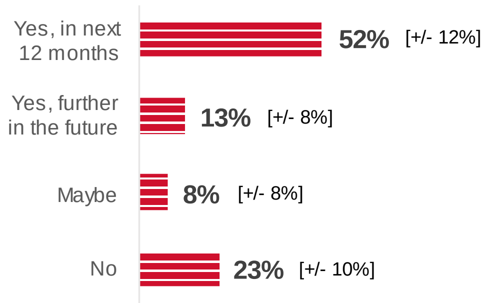


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.8 Webinars

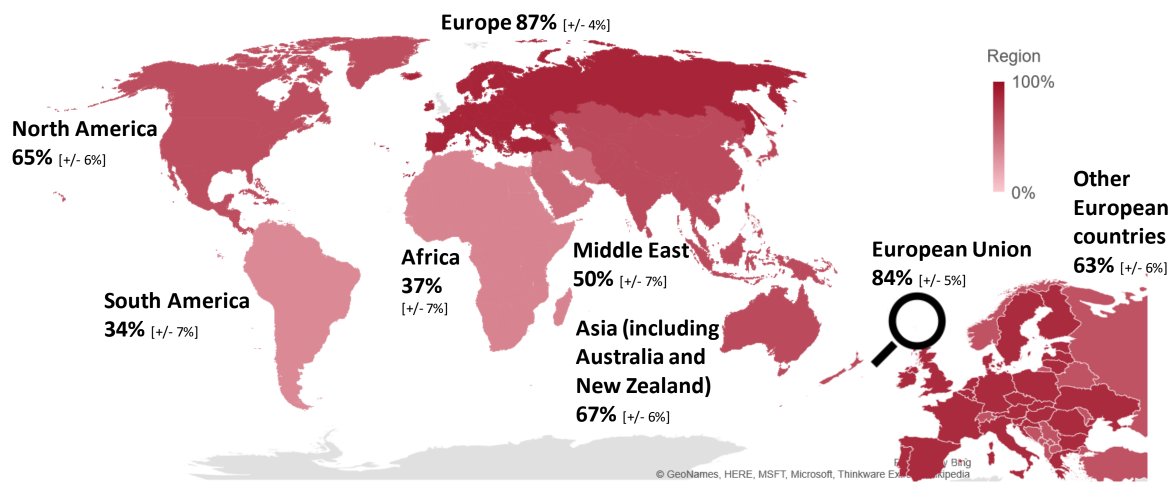
Webinars are organised by the Department for International Trade directly either by a British Embassy or consulate overseas. They are delivered by experts from both private and public-sector organisations. The Webinars' primary aim is to provide information to a target audience ranging from experienced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

These findings are based on interviews with 333 businesses who registered to take part in Webinars in in April 2018 to March 2019. Three-quarters (77%) sold goods overseas and just over a third (38%) services (61% only sold goods, 22% only sold services and 16% sold both).

3.8.1 Webinars: Business export status

Eighty-seven per cent of businesses currently export by selling goods or services or have done previously. Of these, eight in ten (84%) sold within the European Union and six ten (63%) sold within the rest of Europe. Two-thirds (67%) sold in Asia, six in ten (65%) in North America and half (50%) in the Middle East. Smaller proportions sold in Africa (37%) and South America (34%).

Chart 3.8.1 Regions organisations exports to or exported to previously – Webinars



Europe	87% [+/- 4%]
Asia (including Australia and New Zealand)	67% [+/- 6%]
North America	65% [+/- 6%]
Middle East	50% [+/- 7%]
Africa	37% [+/- 7%]
South America	34% [+/- 7%]

European Union	84% [+/- 5%]
Other European countries	63% [+/- 6%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Webinars and who have exported (238)

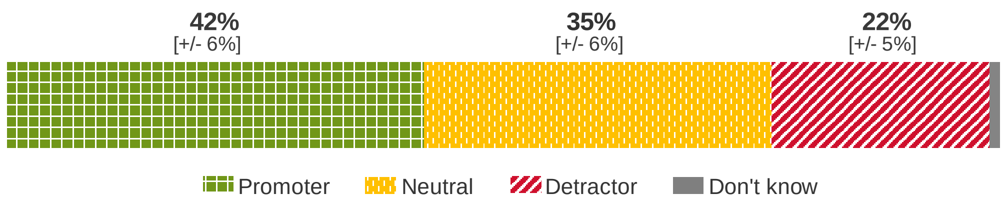
3.8.2 Service performance: Webinars

This section examines the performance of the service provided by Webinars. It covers 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 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) and assigned a Net Promoter Score (NPS). Two in five (42%) were 'Promoters' of Webinars (score of nine or ten), while just under one in four (22%) were ‘Detractors’ (score of zero to six) and one in three (35%) were neutral (score of seven or eight); Chart 3.8.2 provides details. Overall, Webinars had a positive NPS of +19.

Chart 3.8.2 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 (333)

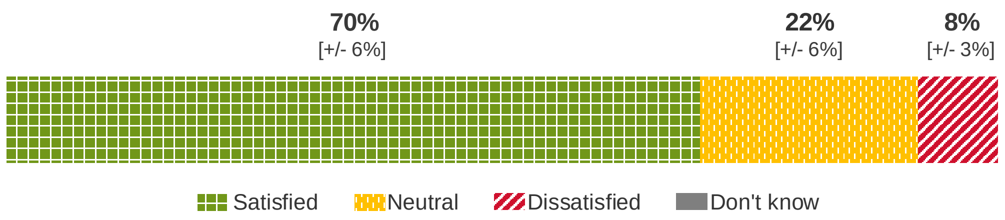
The likelihood of recommending the service was lower among businesses that only received a small amount of their turnover from exports. Specifically, businesses that had less than five per cent of their turnover from exports were more likely to be detractors (40%) than businesses overall (22%).

Businesses were asked about ways the service they used **could be improved**. Information was the most frequently cited area for improvement (12%), specifically, better or more information (eight per cent). One in ten businesses (11%) mentioned improvements to technology, such as website issues.

Businesses were asked **how satisfied they were** with the overall experience of using the service. They were asked to rate the service on a scale from zero (very dissatisfied) to ten (very satisfied)[32].

Seven in ten businesses (70%) were satisfied with their experience of Webinars (rating of seven or more out of ten), and this included one in five businesses (21%) who gave a ‘very satisfied’ rating (ten out of ten). Eight per cent of businesses were dissatisfied (rating of three or below), while 22% gave a neutral rating (between four and six).

Chart 3.8.3 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 (325)

Satisfaction with the service was consistent across different types of business. The only differences were that businesses with a low annual turnover (less than £500,000) were less likely

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

to be satisfied than businesses overall (55% compared with 70%); and businesses that only sold goods overseas were more likely to be satisfied (78%) than those who only sold services (51%).

Of the 24 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 Webinars was that businesses could not find what they were looking for on the website (8 respondents). Other main reasons for dissatisfaction were that they did not get enough information or advice (seven respondents) the service did not help them (seven respondents). This was an open question and interviewers then coded responses against a pre-defined list of options. These results should be treated with caution due to low base size.

Perceptions of advice and support

Businesses were asked to rate the advice and support they received from Webinars.

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 Webinars (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 Webinars, seven in ten (72%) said they attended a course or webinar, while half looked for further information or used any online services on the DIT or Great.gov.uk website (52%) and more than a third were referred to use other DIT services (36%). A quarter (23%) attended an event or trade fair or mission as a result of using the service, and a similar proportion (23%) were referred to the services of another organisation.

In addition, a quarter of businesses (23%) were provided with new business contacts or export opportunities.

Chart 3.8.4 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 (333)

Just under half (45%) of the business that received more than 75% of their turnover from exporting had attended an event, trade fair or mission.

---

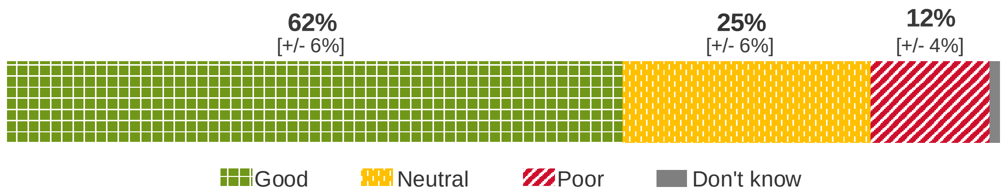
33 The list of activities associated with each product or services comes from a logic model Frontier Economics developed for DIT which identified a list of activities, outcomes and impacts of each product or service included in this report.

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, 14% received tailored 'route to market' information, seven 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).

Three in five (62%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while one in four (25%) were neutral (score of four to six) and one in eight (12%) said it was poor (rating of zero to three).

Chart 3.8.5 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 Webinars, except those giving a 'not applicable' answer (317)

The extent to which the service met the businesses needs was rated as good was higher for businesses with 250+ employees (82%), businesses that received more than 75% of their turnover from exporting (71%) and those that had been exporting for more than ten years (70%).

Businesses were asked to **rate their experience on a number of criteria**. Findings are shown in Table 3.8.1 and Chart 3.8.6. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six are labelled as neutral, and zero to three are marked as negative.

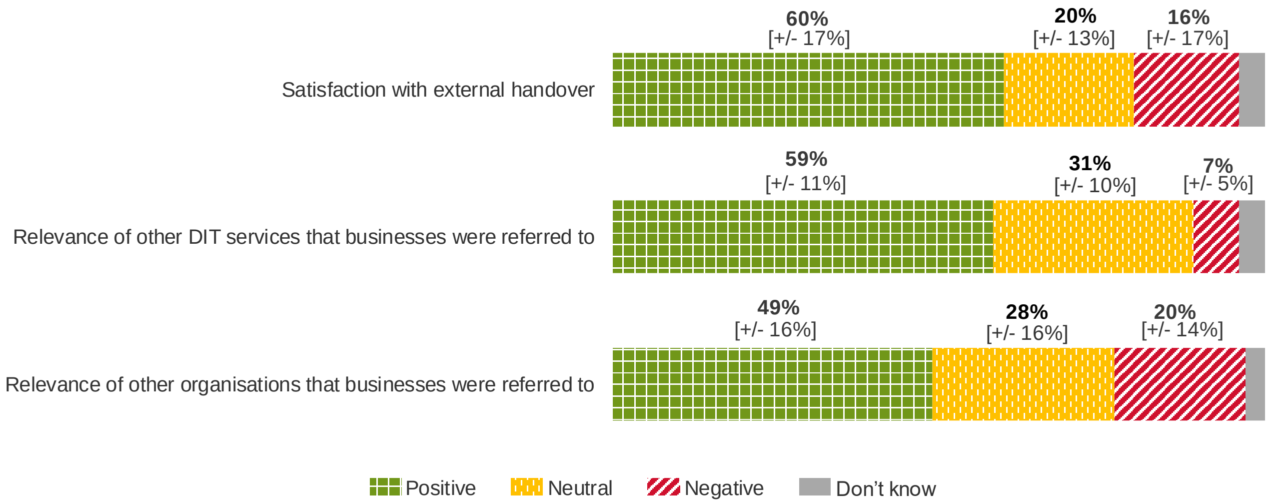
For each measure, more than half of businesses gave a positive rating for their experience of Webinars, with the highest ratings given for the registration process (90% rated the process as 'straightforward') and staff knowledge (85% rated staff as 'knowledgeable'). Businesses were positive about the amount of time taken to receive information (80% rated this as 'acceptable'), the clarity of the steps they needed to take when using the service (76% rated this as 'clear') and how comprehensive the information they received was (73% rated this as 'good'). Businesses gave lower ratings for the relevance of referrals – to other DIT services (59%) or to other organisations (49%). There were no noticeable differences for these questions by business type.

Table 3.8.1 Rating by businesses of the specific advice and support they received - Webinars

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
How straight forward was the registration for the service	**90%** [+/- 5%]	**8%** [+/- 4%]	**2%** [+/- 1%]
Rating of staff knowledge	**85%** [+/- 5%]	**11%** [+/- 4%]	**3%** [+/- 3%]
Amount of time take to receive information	**80%** [+/- 5%]	**15%** [+/- 5%]	**4%** [+/- 2%]
How clear were the steps they needed to take when using the service	**76%** [+/- 5%]	**20%** [+/- 5%]	**3%** [+/- 2%]
How comprehensive was the information that they received	**73%** [+/- 6%]	**21%** [+/- 5%]	**5%** [+/- 2%]
How clear were the steps they needed to take after using the service	**69%** [+/- 6%]	**22%** [+/- 6%]	**8%** [+/- 4%]
Quality of contacts they were provided with	**67%** [+/- 7%]	**20%** [+/- 6%]	**12%** [+/- 4%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (302). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (322). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (271). Qclarity_1 - The service made clear the steps I needed to take when I was using it (321). Qclarity_2 - The service made clear what I should do next after using it (309). Qqualinfo_1 - Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (239). Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (327). Base: All respondents that used Webinars, except those giving a 'not applicable' answer

Chart 3.8.6 Rating by businesses of handovers and referrals – Webinars*



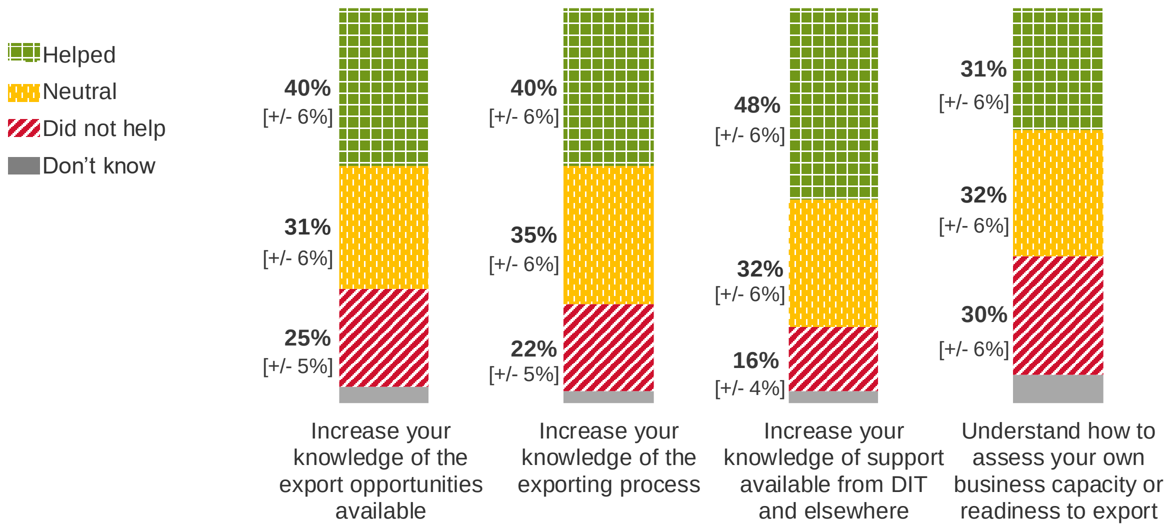
Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (64) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (117). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (65) Base: All respondents that used Webinars, except those giving a 'not applicable' answer
*Low base size, please treat results with caution

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 3.8.7 shows the items that were asked of businesses that used Webinars. This shows that:

- Two in five (40%) businesses that had used Webinars said that the service helped them by increasing their knowledge of export opportunities available, while 25% said the service did not help them in this way.
- Two in five (40%) businesses said that the service helped them by increasing their knowledge of the exporting process, while a quarter (22%) said the service did not help them in this way.
- Just under a half (48%) of businesses that had used Webinars said that the service had helped them increase knowledge of support available from DIT and elsewhere, while 16% said the service did not help them in this way.
- Three in ten (31%) businesses said that the service had helped them to understand how to assess their own business capacity or readiness to export, while the same proportion (30%) said they were not helped in this way.

There were no noticeable differences for these questions by business type.

Chart 3.8.7 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 (333)

Actions taken as a result of service delivery

A series of questions explored what actions businesses reported having taken as a result of using Webinars, examining any additional support received and the types of investment they had made.

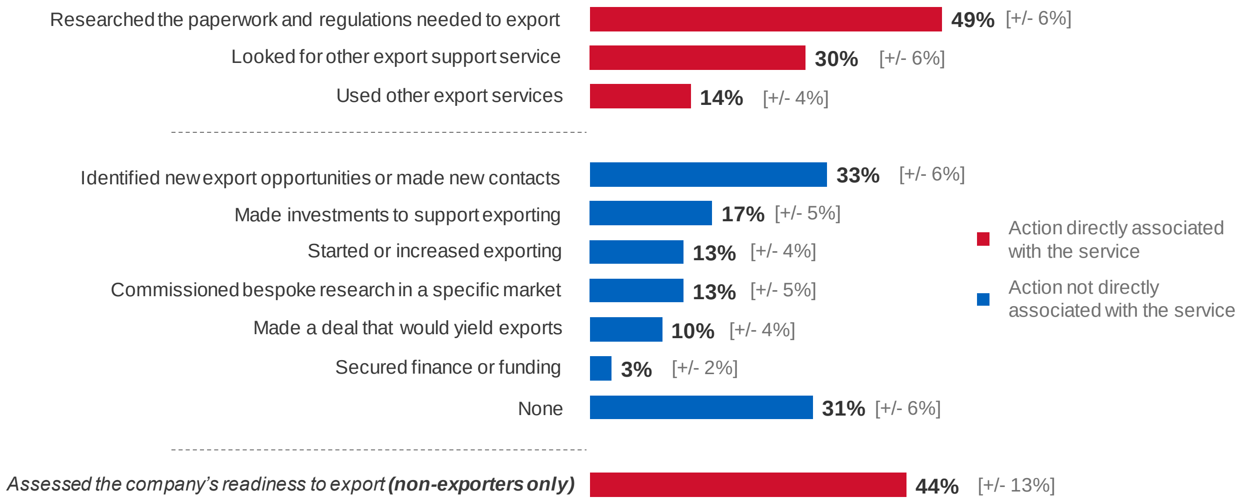
Businesses carried out a **range of actions as a result of using Webinars**. Chart 3.8.8 shows the actions that are most relevant to Webinars (above the dotted line)[34], as well as other actions that businesses may have taken.

Looking firstly at the actions that are most relevant to Webinars, businesses were most likely to say they have researched the paperwork and regulations needed to export (49%) and forty-four per cent of businesses who were not exporting at the time of using the service had assessed the company's readiness to export. A third of all businesses had looked for other export support services (30%) and one in ten (13%) had used other export services.

Other actions (less specific to Webinars) include identifying new export opportunities or making new contacts (33%). Three in ten businesses (31%) had not undertaken any of the listed actions. A more detailed breakdown of responses is shown in Chart 3.8.8.

[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.

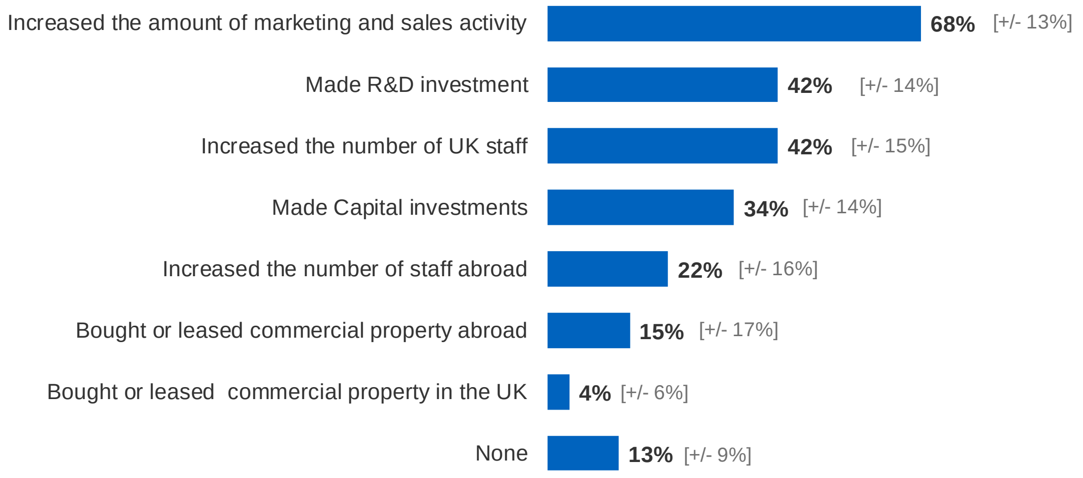
Chart 3.8.8 Actions taken as a result of service delivery - Webinars



Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used Webinars (333). Non-exporters (98)

If businesses reported they had made investments to support exporting as a result of using Webinars (61 businesses), they were asked to specify the **type of investment** they had made. They were most likely to say that they had increased their marketing and sales activity (68%), increased the number of UK staff (42%) or made an R&D investment (42%). Please note that this question has a low base size, so results should be treated with caution.

Chart 3.8.9 Type of investments made - Webinars

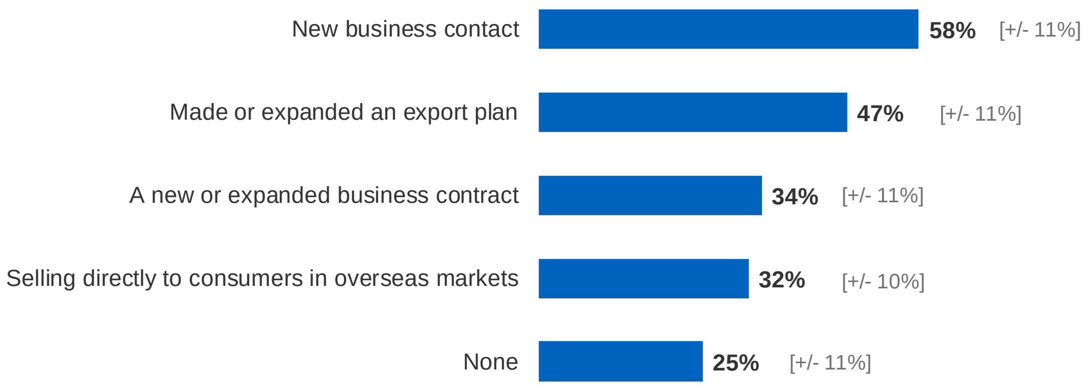


Qresult_invest - Which of the following investments has your business made to support new or increased export opportunities? IF NECESSARY: Please only think about investments relating to export activity. Table is restricted to answers given by more than 2% of respondents. Base: All respondents who had used Webinars and had made investments to support exporting (61)

Businesses that had identified, or been provided with, new business contacts or export opportunities as a result of using Webinars (122 businesses) were asked **what types of opportunities had been identified** (see Chart 3.8.10).

Respondents were most likely to say that they had identified new business contacts (58%), while the other main opportunity was in making or expanding an export plan (47%). There were no noticeable differences by business type.

Chart 3.8.10 Opportunities identified as a result of service - Webinars



Qresult_opps - Which of the following opportunities, if any, has your business identified? Table is restricted to answers given by more than 3% of respondents. Base: All respondents that used Webinars who had an opportunity as a result of service (122)

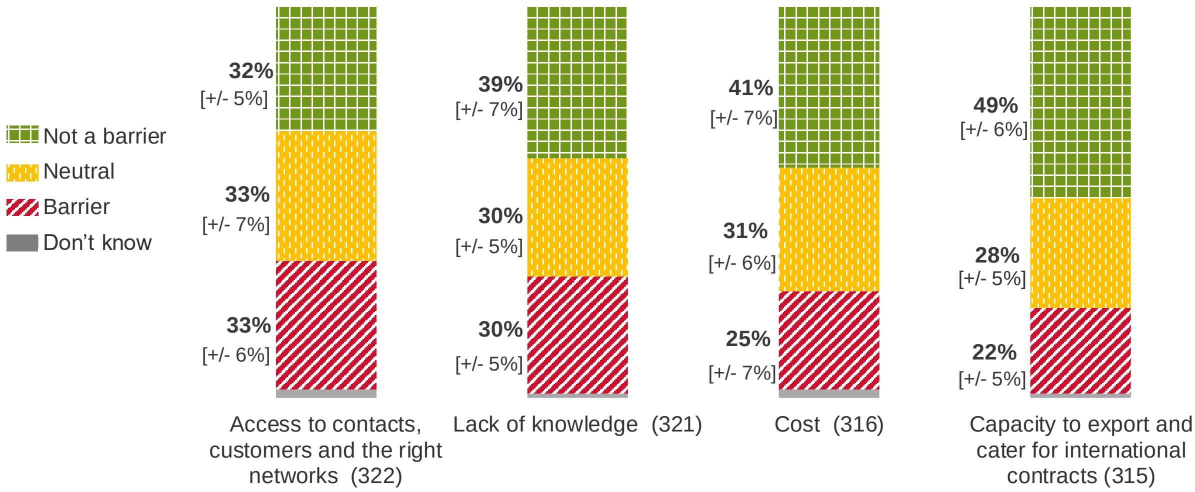
Businesses that had identified a new business contact as part of the DIT service (70 respondents) were read a list of possible **types of contact** and asked which ones they had made. Half of the businesses that had identified a new contact said they had made contact with a distributor (49%), while a similar proportion (47%) had made contact with a buyer.

Barriers to exporting

Businesses were asked about four **potential barriers for their business in relation to exporting** and 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 a similar proportion (30%) said that lack of knowledge was a barrier. A quarter (25%) said cost was a barrier, and just under a quarter (22%) said that capacity to export and cater for international contracts was a barrier; see Chart 3.8.11.

Chart 3.8.11 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

Cost was more likely to be reported as a barrier for businesses that had never exported (39%). Access to contacts, customers and the right networks was more likely to be reported as a barrier for micro businesses (48%) and those that sold goods overseas online (48%).

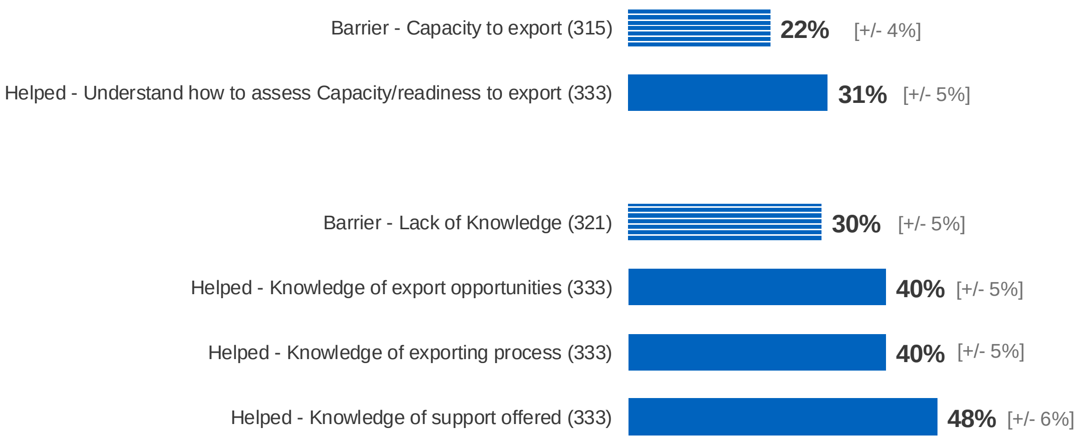
Businesses that had been trading for ten or more years were less likely to have reported capacity to export or access to contacts as barriers (capacity to export 20%, access to contacts 22%).

Chart 3.8.12 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.

A fifth (22%) of businesses said that capacity to export was a barrier. Three in ten businesses (31%) 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 knowledge of support offered (48%), increase knowledge of the exporting process (40%) and increase knowledge of export opportunities (40%).

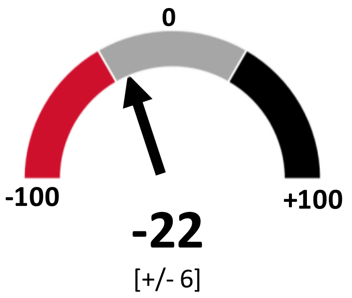
Chart 3.8.12 Barriers to exporting and how DIT helped – Webinars



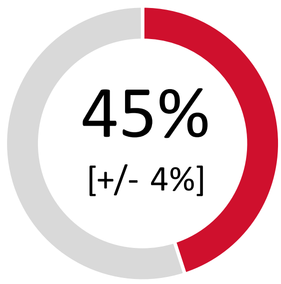
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Webinars, except those giving a 'not applicable' answer
Qknowchange - Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to…Understand how to assess your own business capacity or readiness to export / Increase your knowledge of export opportunities available / Increase your knowledge of support available from the Department for International Trade and elsewhere / Increase your knowledge of the process of exporting. Base: All respondents who used Webinars

Summary page – Export Opportunities

Net Promoter Score

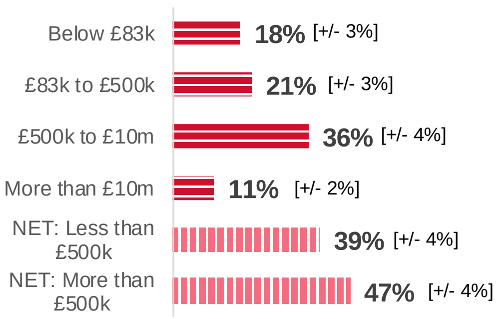


Satisfaction with service

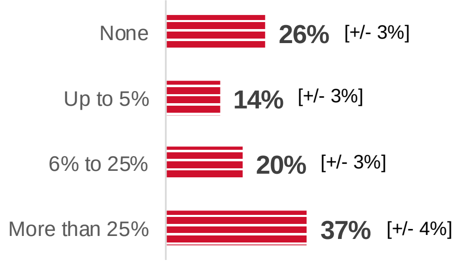


Turnover

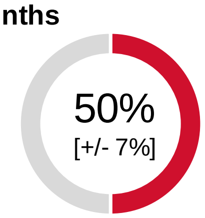
Turnover



% of turnover from exporting

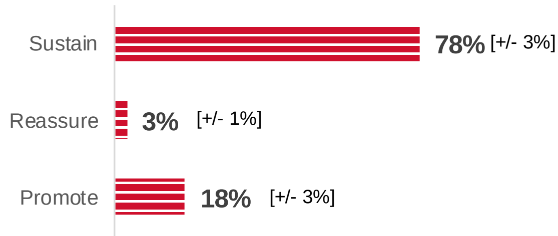


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

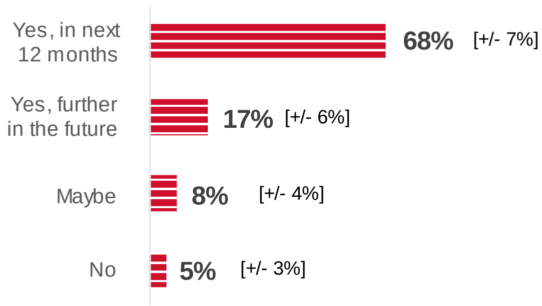


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.9 Export Opportunities

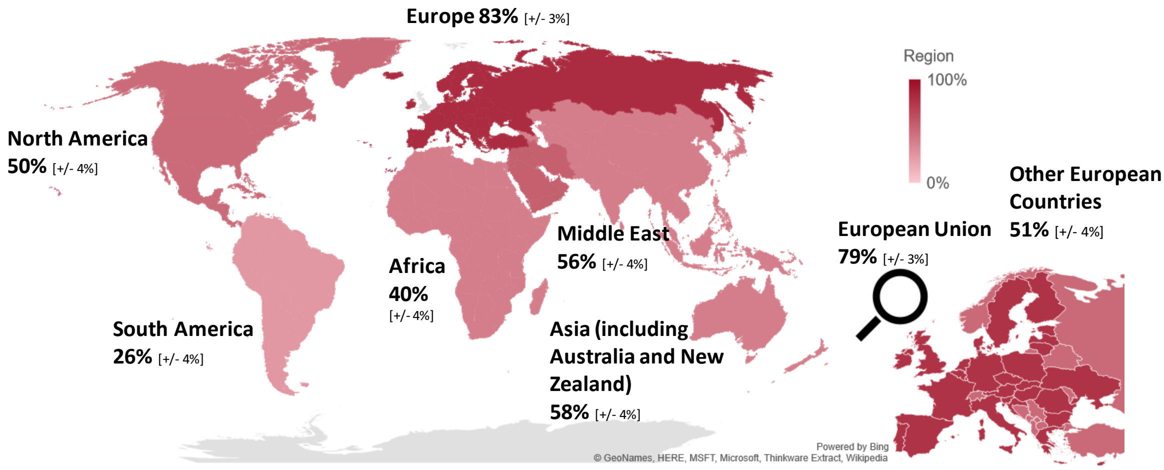
Export Opportunities is an online service on great.gov.uk which promotes global exporting opportunities to UK companies. Most opportunities are fetched from third party feeds via an automated process, with a small number being manually sourced and uploaded by DIT's overseas posts. Customers who are interested 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 893 businesses that used Export Opportunities in April 2018 to March 2019. Six in ten (60%) sold goods overseas and over half (54%) services (46% only sold goods, 40% only sold services and 14% both).

3.9.1 Export Opportunities: Business export status

In total, 78% of businesses currently export by selling goods or services or have done previously. Of these, eight in ten (79%) have sold within the European Union and half (51%) sold within the rest of Europe. More than half sold goods or services in Asia (58%) or the Middle East (56%). Half sold within North America (50%) and 40% in Africa. The least common area was South America with 26% of businesses selling there.

Chart 3.9.1 Regions organisations reported exporting to or exported to previously – Export Opportunities



Europe	83% [+/- 3%]
Asia (including Australia and New Zealand)	58% [+/- 4%]
Middle East	56% [+/- 4%]
North America	50% [+/- 4%]
Africa	40% [+/- 4%]
South America	26% [+/- 4%]

European Union	79% [+/- 3%]
Other European countries	51% [+/- 4%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Export Opportunities and who have exported (727)

Larger businesses (in terms of number of employees and annual turnover) were more likely to export to multiple regions, as were businesses that sold goods or services online and those who had a longer relationship with DIT or had been in business for longer.

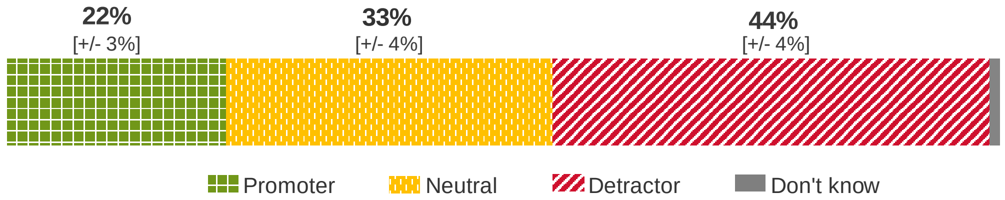
3.9.2 Service performance: Export Opportunities

The perceived performance of Export Opportunities and the service it provides was explored with the business's overall perceptions of the service, their views on specific aspects of advice and support provided by the website, and any actions the business reported taking as a result of using the Export Opportunities website.

Overall perceptions of service

Businesses were asked based on their experience of 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 this question on a scale from ten (extremely likely) to zero (not at all likely) and are assigned a Net Promoter Score. Less than a fifth of businesses (22%) were "Promoters" of the Export Opportunities website (scores of nine and ten), while 44% were "Detractors" (scores of zero to six) and 33% were neutral (scores of seven and eight). Chart 3.9.2 provides details. Overall, Export Opportunities had a negative NPS score of -22.

Chart 3.9.2 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 (893)

The likelihood of recommending the service varied by business size. Specifically, small businesses (with fewer than 50 employees) were more likely to be detractors (47%) than medium-sized businesses (35% with 50-249 employees) or large businesses (28% with 250 or more employees). A similar pattern can be seen in relation to turnover: businesses with a lower annual turnover (less than £5 million) were more likely to be detractors (47%) than those with a high turnover (26% among those with a turnover of £10 million or more). In addition, businesses that only sold goods overseas were more likely to be promoters (26%) than those who sold services (18%).

Businesses were asked about ways they thought Export Opportunities **could be improved.** Communication was the most frequently cited area for improvement (28%) and was most commonly mentioned in terms of more feedback and follow up (16%) and better or more communication overall (9%). Information was also an area for improvement (19%), including 11% who suggested that better or more information would improve the service.

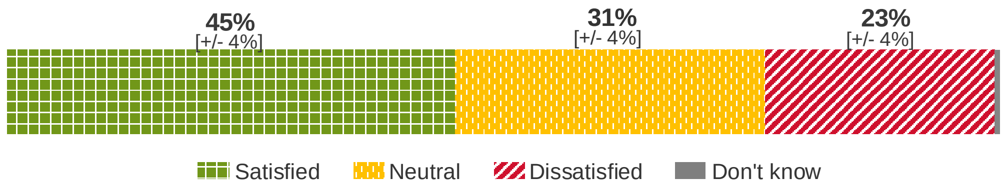
Businesses were also asked **how satisfied they were** with the overall experience of using the service by rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[35].

Fewer than half (45%) of businesses that used the service were satisfied with their overall experience (rating it of seven out of ten or higher), including seven per cent of businesses that were very satisfied (giving a rating of ten out of ten). Three in ten (31%) businesses were neither satisfied nor dissatisfied (giving a rating of between four and six). A quarter (23%) of businesses

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

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).

Chart 3.9.3 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 (882)

Satisfaction with the service was consistent across different types of business. The only differences were that micro businesses (those with between zero and nine employees) were more likely to be dissatisfied (29%), while businesses that were new to exporting were more likely to be satisfied with the service compared with other exporters (54% compared with 44%).

The 185 businesses that reported that they were dissatisfied with their experience of the service overall were asked an open question about why they were dissatisfied. This was then coded to a pre-defined list of options by the interviewer (Table 3.9.1). The most frequent **reasons for dissatisfaction** were that the service did not do anything for the business or did not help (38%) or that that the service did not give enough information or advice (35%). DIT not having enough contact with businesses was another reason for dissatisfaction (24%), as well as the poor quality of contacts (20%). One in six (16%) could not find what they were looking for on the website.

Table 3.9.1 Reasons for dissatisfaction with service – Export Opportunities

Reasons for dissatisfaction	
	%
Did not do anything/did not help	38
Did not give enough information/advice	35
DIT did not have enough contact with me	24
Poor quality of contacts	20
I could not find what I was looking for on the website	16
Poor quality of business opportunities or tenders	12
Advice was more relevant to different types of businesses	11
I was referred to a service that was not relevant to my needs	8

Qwhydis - And why do you say you were dissatisfied? Table is restricted to answers given by more than 4% of respondents. Base: All businesses using the Export Opportunities website who were dissatisfied with the service (185).

Perceptions of advice and support

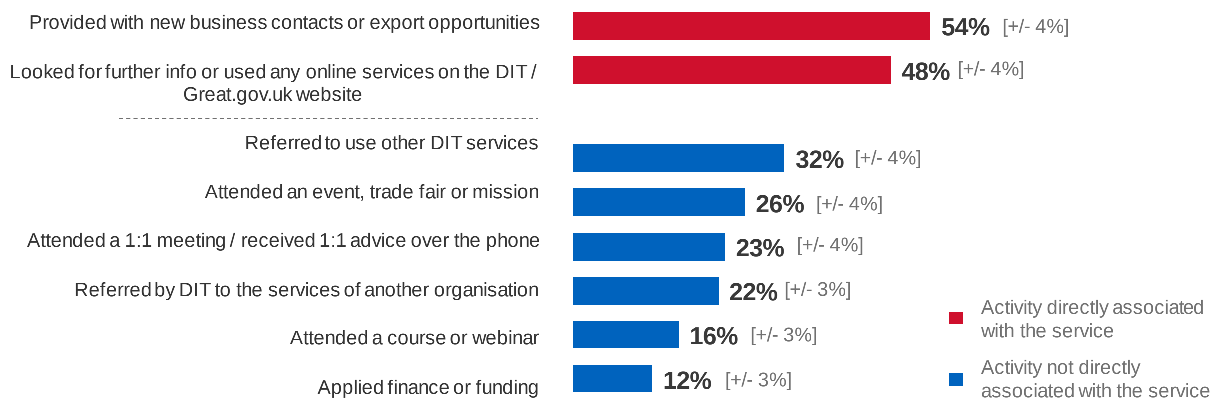
Businesses were asked to rate the advice and support they received from Export Opportunities.

All respondents were asked **what happened when the organisation used the service** (Chart 3.9.4). The chart shows the activities that are most relevant to Export Opportunities (above the dotted line[36]), as well as other activities that businesses may have experienced.

Looking firstly at the activities that are most relevant to Export Opportunities, around half (54%) of businesses were provided with new business contacts or export opportunities as a result of using the service, while just under half (48%) 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, a third of businesses (32%) were referred to use other DIT services. Around a quarter attended an event, trade fair or mission (26%); attended a one-to-one meeting or received one-to-one advice over the phone (23%); or were referred by DIT to the services of another organisation (22%) as a result of using the service. Around a sixth (16%) of businesses took no action as a result of using Export Opportunities.

Chart 3.9.4 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 (893)

Businesses that only sold goods overseas were more likely than businesses that only sold services overseas to have looked for further information or used any online services on the DIT/ Great.gov.uk website (52% and 41% respectively), attended a 1:1 meeting/received 1:1 advice over the phone (27% and 14% respectively) and attended a course or webinar (21% and 12% respectively).

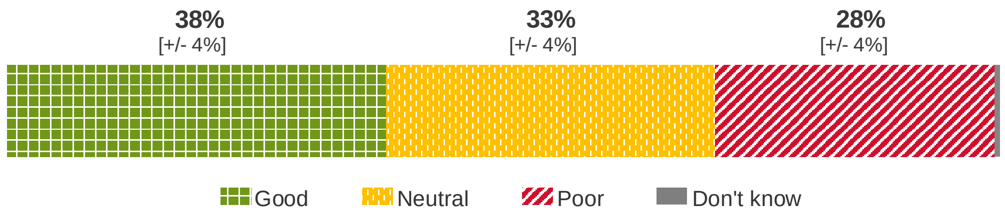
When asked which **specific types of support** they received as part of Export Opportunities, 12% said they received an off-the-shelf overview for existing markets and sectors, 11% received market information about competition specific to your products or services. and nine per cent received tailored ‘route to market’ information.

[36] 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.

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).

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 (28%) of businesses rated the service negatively when asked how it met their needs (a score of 3 or below), while a third (33%) of businesses were neutral (a score between four and six) (Chart 3.9.5).

Chart 3.9.5 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 (860)

Large and medium sized businesses were less likely to say that the extent the service met their needs was poor (11% and 19%) than micro/small businesses (32%).

Businesses were also asked to **rate their experience of the advice and support they received** from Export Opportunities. A detailed breakdown of the criteria businesses rated is shown in Table 3.9.2 and Chart 3.9.6 below. Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six are labelled as neutral, and zero to three are marked as negative.

Businesses were most likely to be satisfied with the registration process with eight in ten (80%) rating this as 'straight forward'. Over six in ten businesses were satisfied with how clear the steps were that they needed to take when they were using the service (64%) and the external handover from DIT to another organisation (62%). More than half of businesses were satisfied with staff knowledge (55%) and the amount of time taken to receive information (54%). Businesses were least likely to give a positive rating for how comprehensive the information they received from the service was (43%) and the quality of the contacts they were provided with (35%).

Table 3.9.2 Rating by businesses of the specific advice and support - Export Opportunities

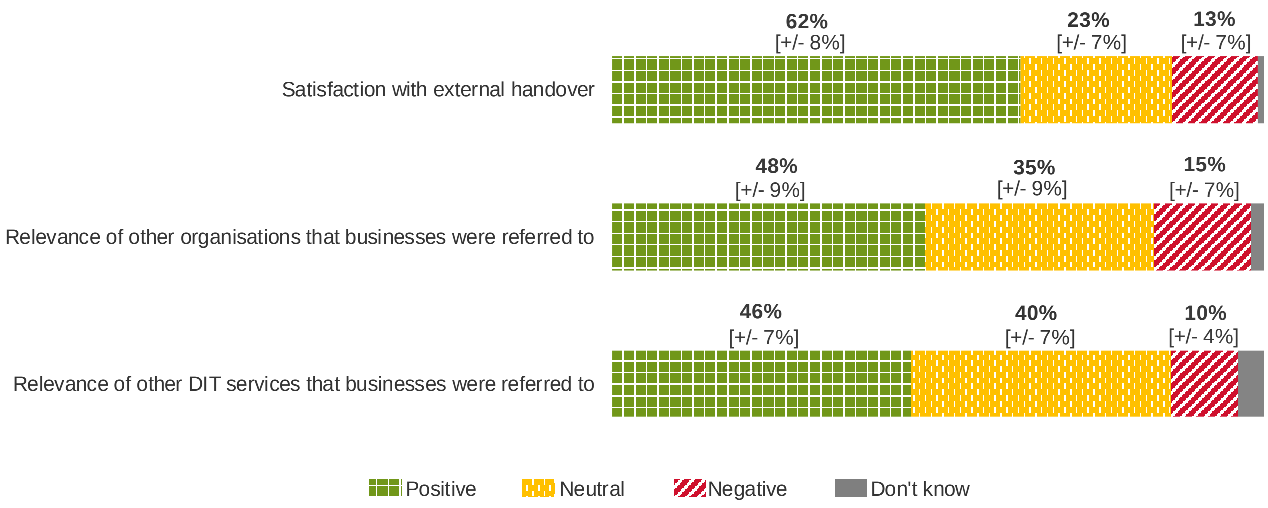
Rating by businesses of the specific advice and support	Positive	Neutral	Negative
How straight forward was the registration for the service	**80%** [+/- 3%]	**12%** [+/- 3%]	**6%** [+/- 2%]
How clear were the steps they needed to take when using the service	**64%** [+/- 4%]	**26%** [+/- 4%]	**10%** [+/- 2%]
Rating of staff knowledge	**55%** [+/- 5%]	**28%** [+/- 5%]	**12%** [+/- 3%]
Amount of time take to receive information	**54%** [+/- 4%]	**26%** [+/- 4%]	**18%** [+/- 3%]
How clear were the steps they needed to take after using the service	**50%** [+/- 4%]	**31%** [+/- 4%]	**18%** [+/- 3%]
How comprehensive was the information that they received	**43%** [+/- 4%]	**39%** [+/- 4%]	**17%** [+/- 3%]
Quality of contacts they were provided with	**35%** [+/- 4%]	**31%** [+/- 4%]	**33%** [+/- 4%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (554). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (810). Qclarity_1 - The service made clear the steps I needed to take when I was using it (870). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (849). Qclarity_2 - The service made clear what I should do next after using it (868). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (778). Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (868). Base: All respondents that used Export Opportunities, except those giving a 'not applicable' answer.

Medium sized businesses (50-249 employees) were more likely to be positive about staff knowledge (74%). First time users of DIT services were more likely to be positive about the amount of time taken to receive information (63%).

Businesses that only sold goods overseas were more likely to be satisfied with the external handover than those that only sold services overseas (81% and 46%). They were also more positive about the relevance of the other DIT services they were referred to (51% and 29% respectively. However, there were higher **negative** ratings among businesses that only sold services overseas for how clear the steps they needed to take after using the service (27%) and how comprehensive the information they received from the service was (24%).

Chart 3.9.6 Rating by businesses of handovers and referrals - Export Opportunities

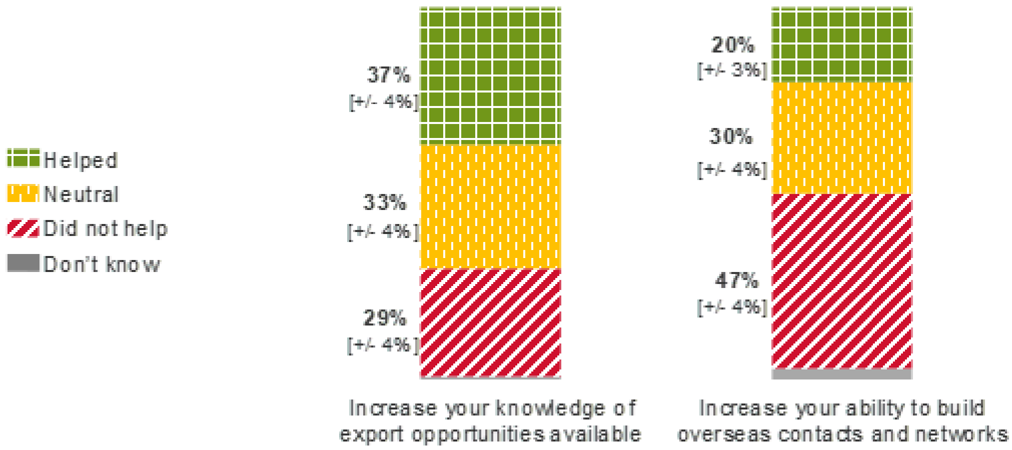


Qsathand - And using the same scale, how satisfied were you with the handover from DIT? (194) Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (267). Qrelorg - And using the same scale, how relevant were the other organisations that you were referred to? (194). 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 3.9.7 shows the items that were asked of businesses that used Export Opportunities. This shows that:

- Nearly four in ten (37%) businesses agreed that the service helped the business to increase their knowledge of export opportunities available, while 29% did not think it helped them in this way;
- A fifth (20%) of businesses agreed that the service helped them to build overseas contacts and networks, while half (47%) of businesses did not think the service helped in this way.

Chart 3.9.7 Perceptions of help Export Opportunities 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 Export Opportunities (893)

Half (49%) of businesses that had never exported said that using the ITA service helped increase their knowledge of export opportunities.

Actions taken by businesses as a result of service delivery

A series of questions explored what actions businesses reported having taken as a result of their interaction with Export Opportunities. These questions examined additional support received, investments made by the business as a result of using the service, any business opportunities they identified, and contacts made through the service.

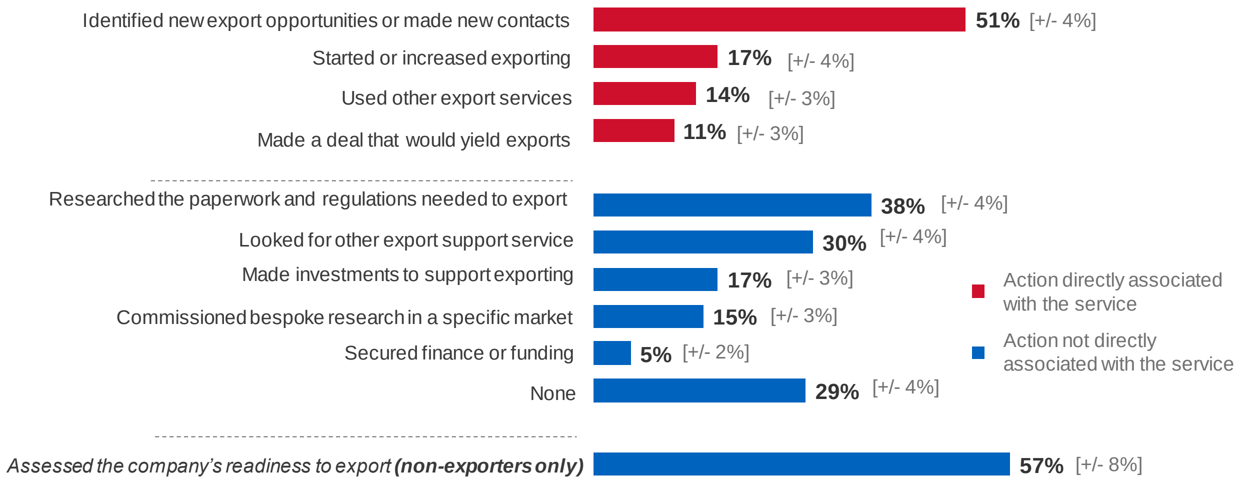
Using a list of pre-determined options, businesses were asked to say what they had done as a result of using the service. Chart 3.9.8 shows the actions that are most relevant to Export Opportunities (above the dotted line)[37], as well as other actions that businesses may have taken.

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 (51%), while one in six (17%) said they started or increased exporting, one in seven (14%) used other export services, and one in nine (11%) made a deal that would yield exports.

Other actions (less specific to Export Opportunities) were researching the paperwork and regulations needed to export (38%) and looking for other export support services (30%). About six in ten (57%) businesses that had never exported had assessed their company's readiness to export. A more detailed breakdown of responses is shown in Chart 3.9.8.

[37] 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.

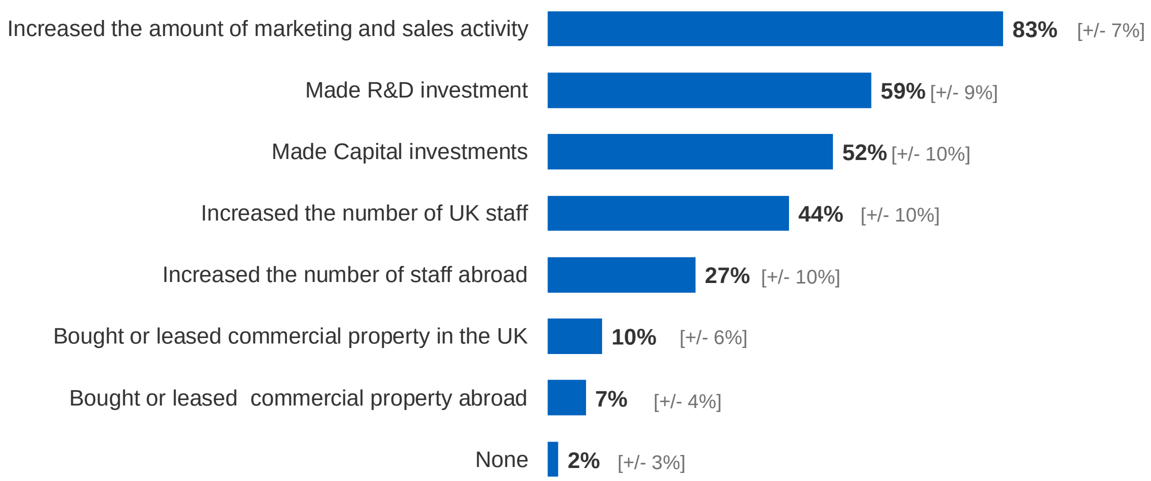
Chart 3.9.8 Actions taken as a result of service delivery– Export Opportunities



Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used Export Opportunities (893), non-exporters (219)

The businesses that reported they had made investments to support exporting as a result of using Export Opportunities (142 businesses) were asked to specify the **type of investment** that they had made. Most businesses (83%) that had made investments to support exporting had increased the amount of marketing and sales activity that they were undertaking. More than half of these businesses made Research and Development (R&D) investments (59%) or made Capital investments (52%), as shown in Chart 3.9.9.

Chart 3.9.9 Type of investments made - Export Opportunities



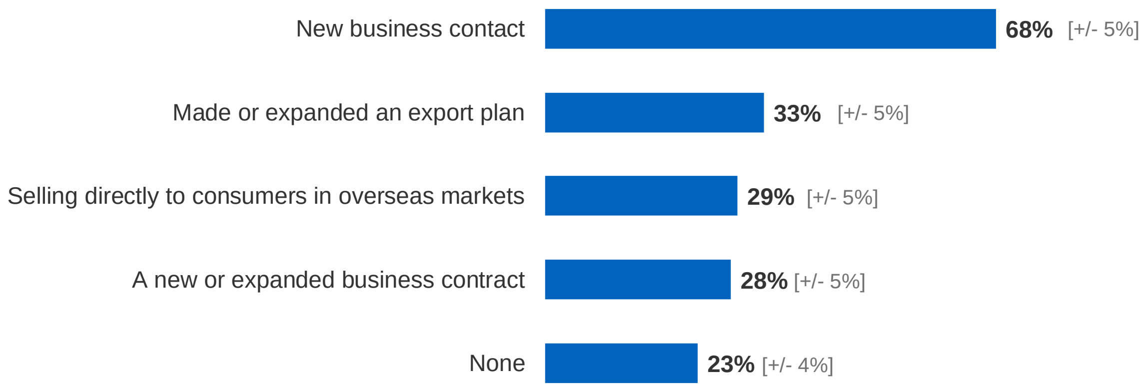
Qresult_invest - Which of the following investments has your business made to support new or increased export opportunities? IF NECESSARY: Please only think about investments relating to export activity. Table is restricted to answers given by more than 2% of respondents. Base: All respondents who had used Export Opportunities and had made investments to support exporting (142)

Almost two-thirds of businesses that only sold goods overseas made a capital investment (63%).

Businesses that reported having identified new export opportunities or having made new contacts (602 businesses) were asked what kind of opportunities they had identified (Chart 3.9.10).

Two-thirds (68%) of businesses identified new business contacts. Businesses also made or expanded their export plans (33%), sold directly to consumers in overseas markets (29%) or developed a new or expanded business contract (28%).

Chart 3.9.10 Opportunities identified – 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 had used Export Opportunities and identified an opportunity as a result (602)

Businesses that had used DIT services for five or more years, or been trading for ten or more years were more likely to have said that they identified a new or expanded business contract (37% and 35% respectively).

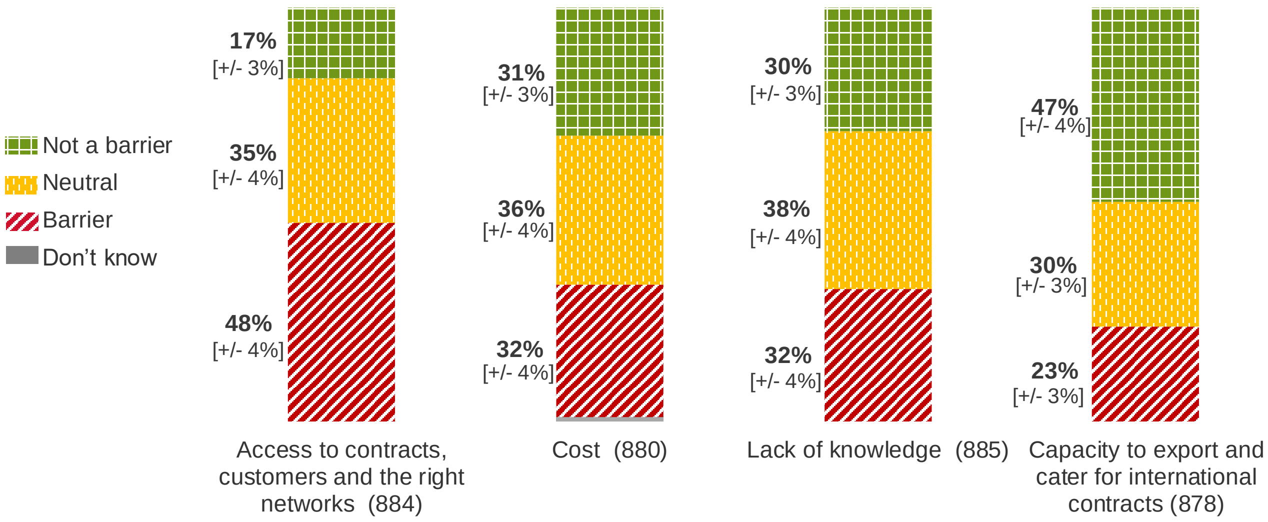
Businesses that made a new business contact as a result of service (404 businesses) were asked **what contacts the organisation had used** from a list asked by the interviewer. More than half of businesses (54%) had made contact with a buyer, while 39% had made contact with a distributor.

Barriers to exporting

Businesses were asked about four **potential barriers for their business in relation to exporting** and 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) (Chart 3.9.11).

Nearly half (48%) of businesses indicated that access to contacts, customers and the right networks was a barrier to exporting, including seven per cent who thought this was a very strong barrier (a score of ten out of ten). Cost (32%) and lack of knowledge (32%) were also reported as barriers by a third of businesses. Fewer businesses reported the capacity of their business to export and cater for international contacts as a barrier (23%), including 13% who thought this was not a barrier at all (a score of zero out of ten).

Chart 3.9.11 Barriers to exporting - Export Opportunities

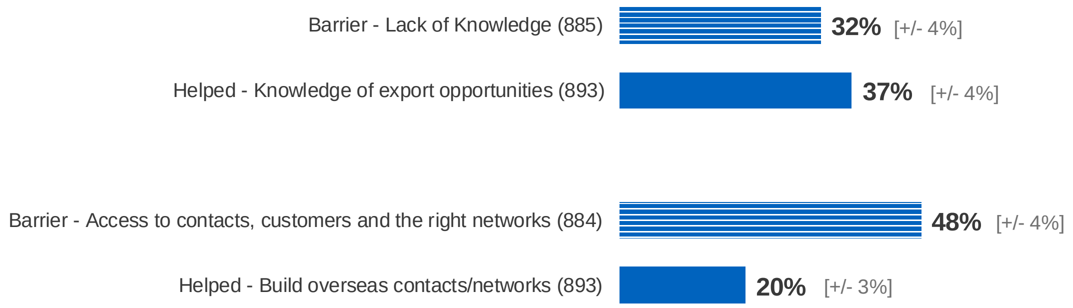


Businesses that had never exported or had been trading for less than a year were more likely to have said that knowledge was a barrier (37% and 46% respectively). Capacity was more a barrier for large businesses (250+ employees) (37%).

Chart 3.9.12 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).

A third of businesses (32%) said that lack of knowledge was a barrier to exporting and 37% 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 (48% and 20% respectively).

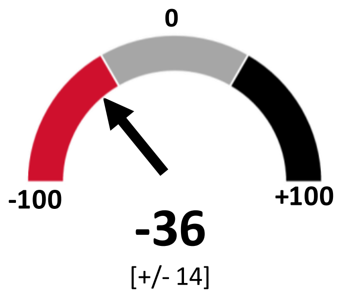
Chart 3.9.12 Barriers to exporting and how DIT helped - Export Opportunities



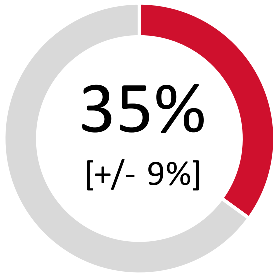
Qbarrier – On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Export Opportunities except those giving a 'not applicable'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

Summary page – Business Profiles

Net Promoter Score

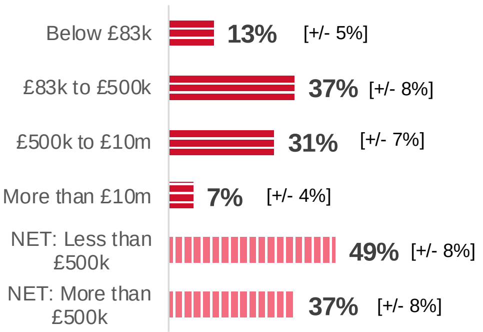


Satisfaction with service

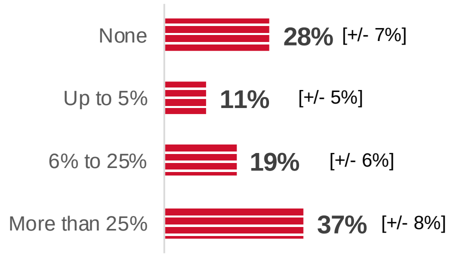


Turnover

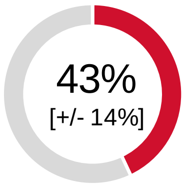
Turnover



% of turnover from exporting

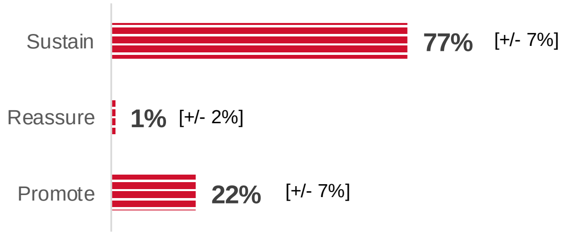


% of businesses who have increased proportion of turnover from exports in last 12 months



Exporter status

Exporter status

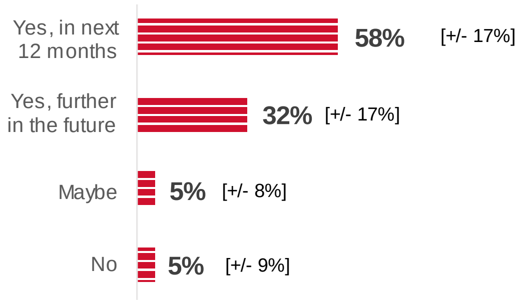


Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

Non-exporter plans to sell overseas



3.10 Business Profiles (Find a Buyer)

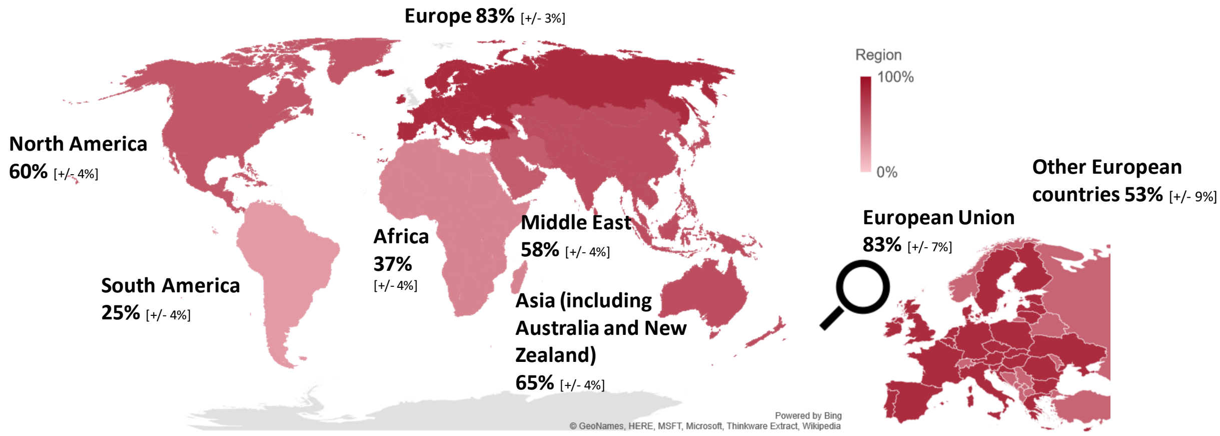
Business Profiles, previously known as Find a buyer/seller is an online service which enables users to promote products and services to international buyers. Businesses set up a business profile on great.gov.uk which allows them to connect directly with international buyers.

These findings are based on interviews with 158 businesses who used the Business Profiles service in April 2018 to March 2019. Three in five (58%) sold goods overseas and the same proportion (59%) sold services (41% only sold goods, 41% only sold services and 18% sold both).

3.10.1 Business Profiles: Business export status

Overall, at the time of the survey 77% of businesses that used Business Profiles were currently exporting by selling goods or services or had done previously. Of these, eight in ten businesses (83%) exported goods or services within the European Union and half (53%) sold within the rest of Europe. Two in three sold goods or services in Asia (65%) and three in five North America (61%) or the Middle East (58%). Smaller proportions sold in Africa (37%) and South America (25%).

Chart 3.10.1 Regions organisations exports to or exported to previously – Business Profiles



Europe	83% [+/- 3%]
Asia (including Australia and New Zealand)	65% [+/- 4%]
North America	60% [+/- 4%]
Middle East	58% [+/- 4%]
Africa	37% [+/- 4%]
South America	25% [+/- 4%]

European Union	83% [+/- 7%]
Other European countries	53% [+/- 9%]

Qcurexp – [Do you currently/Did you] export to any of the following regions? Base: All respondents who used Business Profiles and who have exported (124)

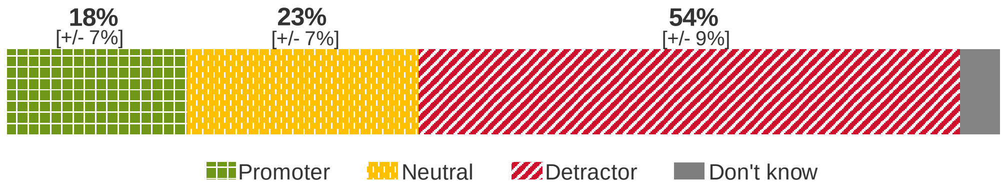
3.10.2 Service performance: Business Profiles

This section examines the performance of the Business Profiles service. It covers 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 Business Profiles, **how likely it was that they would recommend using the service** to a colleague or business associate who had similar needs to their own. The majority of businesses (54%) were 'Detractors' of Business Profiles (score of zero to six), while around one in six (18%) were 'Promoters' (score of nine or ten) and around one in four (23%) were neutral (score of seven or eight); Chart 3.10.2 provides details. Overall, Business Profiles had a negative NPS of -36.

Chart 3.10.2 Likelihood of recommending service (NPS) - Business Profiles



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 Business Profiles (158)

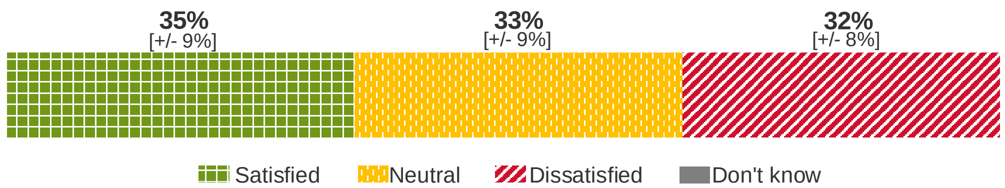
There was generally little variation by business type. Those who only sold goods overseas were more likely to be detractors (67%) than those who only sold services overseas (41%).

Businesses were asked to think about the service they received and suggest **ways in which it could be improved**. Communication was the most frequently cited area for improvement (28%), including 17% who said that they would like more feedback or follow-up. Businesses also requested better service (16%); information (13%), including nine per cent who said that they would like better or more information; and contacts (13%), including a wider range of contacts or better quality leads.

Businesses were asked **how satisfied they were** with the overall experience of the service, rating the service on a scale from zero (very dissatisfied) to ten (very satisfied)[38].

Around a third of businesses (35%) were satisfied with their experience of Business Profiles (rating of seven or more out of ten), and this included ten per cent of businesses who gave a ‘very satisfied’ rating (ten out of ten). A third of businesses (32%) were dissatisfied (rating of three or below), including 15% who gave a ‘very dissatisfied’ rating (zero out of ten), while a third (33%) gave a neutral rating (between four and six). There was no noticeable difference by business type.

Chart 3.10.3 Satisfaction with service – Business Profiles



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 Business Profiles, except those giving a ‘not applicable’ answer (152)

Of the 53 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 Business Profiles was that businesses did not feel the service did anything for them or did not help them (32 respondents). Other main reasons for dissatisfaction were that they did not get enough information or advice (18 respondents) and that DIT did not have enough contact with them (11 respondents).

---

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

This was an open question and interviewers then coded responses against a pre-defined list of options. These results should be treated with caution due to low base size.

Perceptions of advice and support

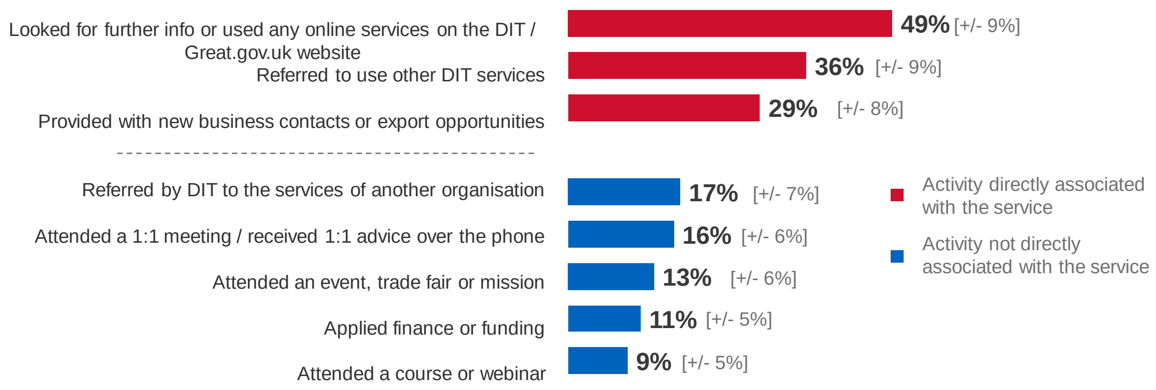
Businesses were asked to rate the advice and support they received from the Business Profiles service.

All respondents were asked **what happened when the organisation used the service** (Chart 3.10.4). The chart shows the activities that are most relevant to Business Profiles (above the dotted line)[39], as well as other activities that businesses may have experienced.

Looking firstly at the activities that are most relevant to Business Profiles, businesses were most likely to say that they looked for further information or used an online service on the DIT or Great.gov.uk website (49%), were referred to use other DIT services (36%) or were provided with new business contacts or export opportunities (29%). Businesses were less likely to say that they were referred to the services of another organisation (17%) or that they attended an event, trade fair or mission (13%).

In addition, one in six businesses said they were referred by DIT to the services of another organisation (17%) or attended a one-to-one meeting or received one-to-one advice over the phone (16%), while smaller proportions applied for finance or funding (11%) or attended a course or webinar (nine per cent). Around a quarter (27%) of businesses said that none of the specified activities took place. There was no noticeable difference by business type.

Chart 3.10.4 Specific activities experienced when using Business Profiles



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 Business Profiles (158)

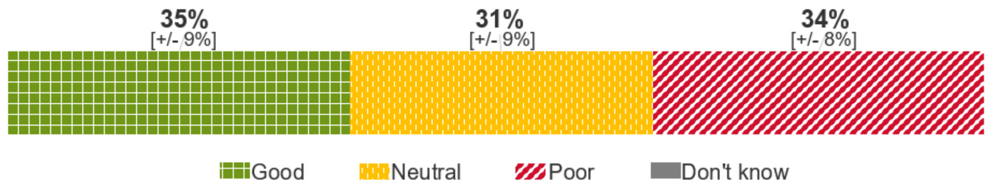
When asked which **specific types of support** they received as part of Business Profiles, 11% said they received an off-the-shelf overview for existing markets and sectors, seven per cent received market information about competition specific to your products or services, and five per cent received tailored 'route to market' information.

[39] 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.

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 3.10.5, around a third (35%) rated the overall service as good in meeting their needs (score of seven or more out of ten), while 31% were neutral (score of four to six) and 34% said it was poor (rating of zero to three). There was no noticeable difference by business type.

Chart 3.10.5 Rating of whether overall service met needs - Business Profiles



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 Business Profiles, except those giving a 'not applicable' answer (146)

Businesses were asked to **rate their experience on a number of criteria**. Findings are shown in Table 3.10.1 and Chart 3.10.6 (please note Chart 3.10.6 has a low base size, so results should be treated with caution). Ratings were on a ten-point scale. Ratings of seven to ten are labelled as positive, four to six as neutral, and zero to three are labelled as negative.

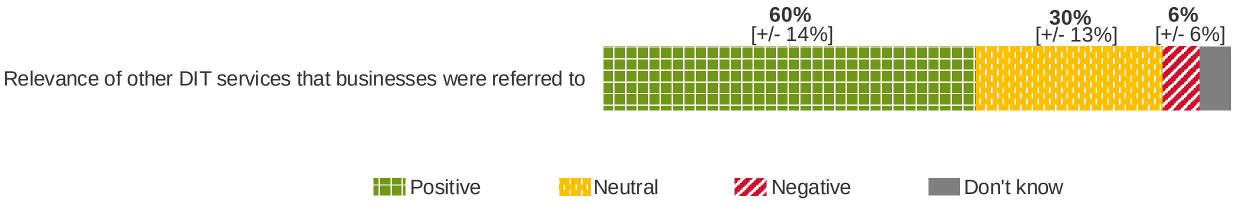
Eight in ten businesses gave a positive rating for the registration process (81% rated the process as 'straightforward'. Two-thirds of businesses gave positive ratings for the clarity of the steps they needed to take when using the service (68%) and for staff knowledge (65%), while more than half of businesses were positive towards the relevance of other DIT services that they were referred to (60%) and the amount of time taken to receive information (54%). Businesses were least likely to give positive ratings for the quality of contacts they were provided with (34%). There was no noticeable difference by business type.

Table 3.10.1 Rating by businesses of the specific advice and support they received - Business Profiles

Rating by businesses of the specific advice and support	Positive	Neutral	Negative
How straight forward was the registration for the service	**81%** [+/- 6%]	**13%** [+/- 5%]	**4%** [+/- 4%]
How clear were the steps they needed to take when using the service	**68%** [+/- 8%]	**22%** [+/- 6%]	**8%** [+/- 4%]
Rating of staff knowledge	**65%** [+/- 10%]	**22%** [+/- 9%]	**10%** [+/- 6%]
Amount of time take to receive information	**54%** [+/- 10%]	**29%** [+/- 9%]	**17%** [+/- 6%]
How clear were the steps they needed to take after using the service	**49%** [+/- 10%]	**27%** [+/- 7%]	**22%** [+/- 6%]
How comprehensive was the information that they received	**48%** [+/- 10%]	**32%** [+/- 8%]	**19%** [+/- 7%]
Quality of contacts they were provided with	**34%** [+/- 10%]	**25%** [+/- 8%]	**40%** [+/- 10%]

Qknowstaff - How would you rate the knowledge of staff at this service using the same scale as before? (97). Qtimetaken - How acceptable was time taken to receive the information or support you required from the service? (134). Qclarity_1 - The service made clear the steps I needed to take when I was using it (152). Qcomp - Using the same scale, how would you rate the comprehensiveness of information received from [SAMPLED SERVICE]? (138). Qclarity_2 - The service made clear what I should do next after using it (150). Qqualinfo_1 – Using that same scale, how would you rate…the quality of contacts you received through [SAMPLED SERVICE]? (121). Qreg - Using the same scale, how straightforward did you find the registration process for the [SAMPLED SERVICE]? (155). Base: All respondents that used Business Profiles, except those giving a 'not applicable' answer

Chart 3.10.6 Rating by businesses of the handover and referrals they received – Business Profiles*



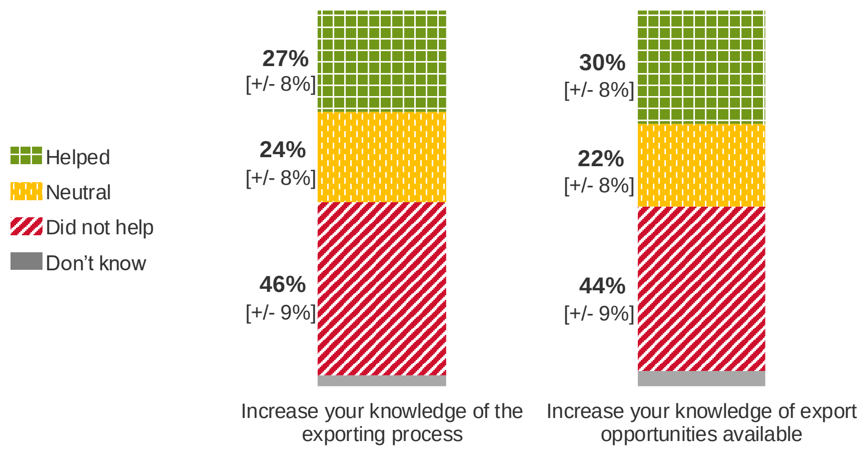
Qrelserv - How relevant were the other DIT services that you were referred to? Please rate this on a scale of 0 to 10 where 10 is very relevant and 0 is not at all relevant (52*). Base: All respondents that used Business Profiles, except those giving a 'not applicable' answer
*Low base size, please treat results with caution

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 3.10.7 shows the items that were asked of businesses that used Business Profiles. This shows that:

- Around a quarter of businesses (27%) said that the service helped them by increasing their knowledge of the exporting process, while just under half (46%) said the service did not help them in this way.
- Three in ten businesses (30%) said the service had increased their knowledge of the export opportunities that were available, while a larger proportion (44%) said they were not helped in this way.

There were no noticeable differences by business type.

Chart 3.10.7 Perceptions of help Business Profiles 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 Business Profiles (158)

Actions taken as a result of service interaction

A series of questions explored what actions businesses reported having taken as a result of their interaction with Business Profiles, examining additional support received, investments made by the business as a result of using the service, any business opportunities they identified and contacts they made.

Businesses reported carrying out a **range of actions as a result of using Business Profiles**. Chart 3.10.8 shows the actions that are most relevant to Business Profiles (above the dotted line)[40], as well as other actions that businesses may have taken.

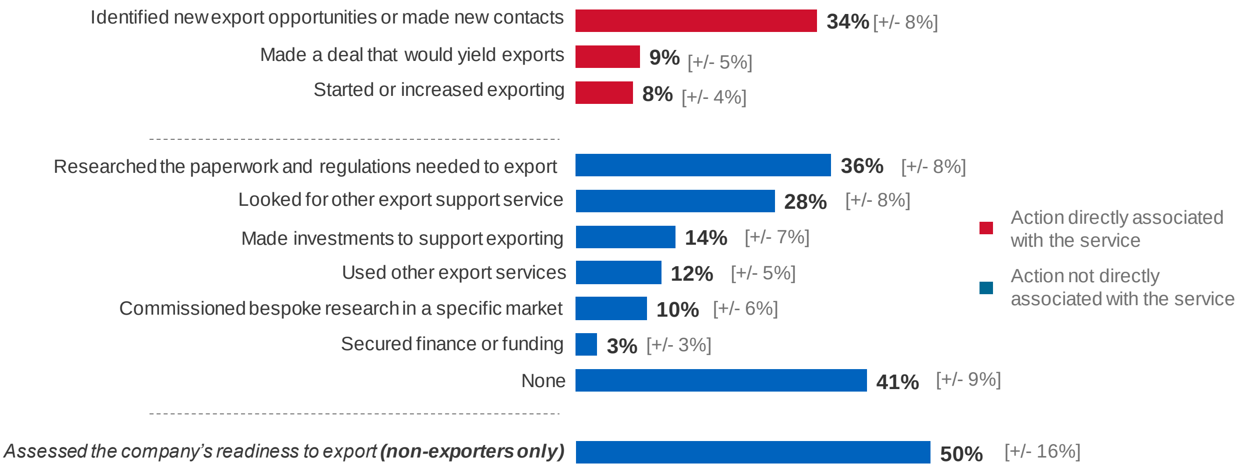
Businesses were most likely to say they identified new export opportunities or made new contacts (34%), while smaller proportions made a deal that would yield exports (nine per cent) or started or increased exporting (eight per cent).

Other actions (less specific to Business Profiles) that were taken by business include non-exporters having assessed the company's readiness to export (50% of non-exporters), having researched the paperwork and regulations needed to export (36%) and looking for other export support services (28%). While 14% of businesses made investments to support exporting as a

[40] 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 associated with each product or service included in this report.

result of using Export Opportunities. Four in ten (41%) businesses said that they had not done any of the specified actions as a result of using the service.

Chart 3.10.8 Actions taken as a result of service interaction – Business Profiles



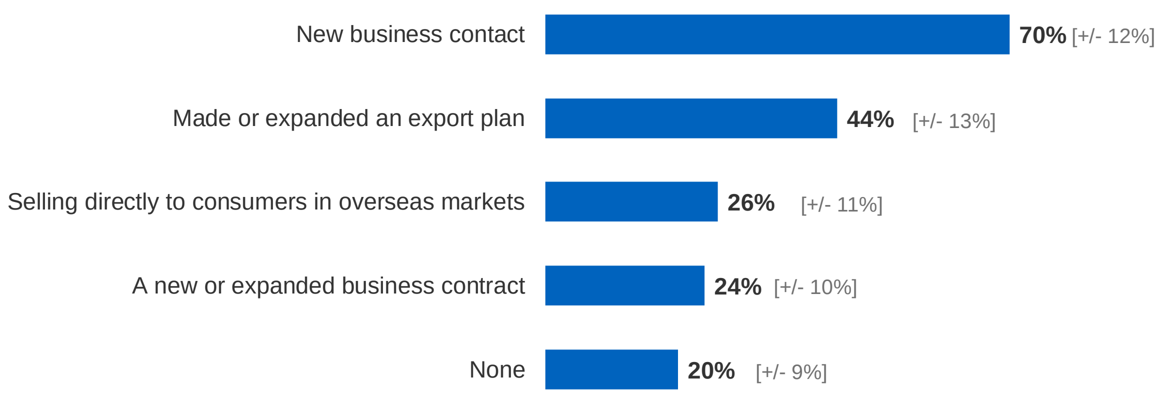
Qresult - What has your business done as a result of [SAMPLED SERVICE]? Table is restricted to answers given by more than 2% of respondents. Base: All respondents who used Business Profiles (158). Non-exporters (38)

Businesses that only sold goods overseas and those who were dissatisfied with the service were more likely to report that they had done none of these actions (60% and 61% respectively).

Businesses that had identified, or been provided with, new business contacts or export opportunities as part of the Business Profiles service (67 respondents) were asked **what types of opportunities had been identified** (see Chart 3.10.9; please note this chart has a low base size so results should be treated with caution).

Seven in ten businesses had identified new business contacts (70%), while two in five had made or expanded an export plan (44%).

Chart 3.10.9 Opportunities identified as a result of service interaction – Business Profiles*



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 Business Profiles who had identified a new business contact as part of the DIT service (67*)
*Low base size, please treat results with caution

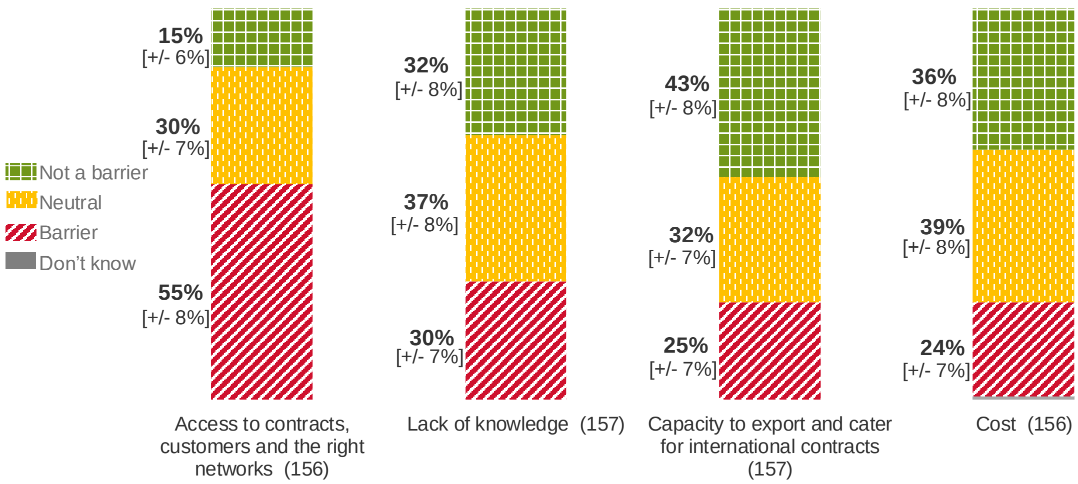
Businesses that had identified a new business contact as part of using Business Profiles (46 respondents) were read a list of **types of contact** and asked which ones they had made. Businesses were most likely to say that they had made contact with a buyer (28 respondents), while some had also made contact with a distributor (12 respondents) or an agent (11 respondents).

Barriers to exporting – Business Profiles

Businesses were asked about four **potential barriers for their business in relation to exporting** and 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).

Over half of businesses (55%) said that access to contracts, customers and the right networks was a barrier for their business, while three in ten (30%) said that lack of knowledge was a barrier. A quarter (25%) said that capacity to export and cater for international contracts was a barrier, while a quarter (24%) said that cost was a barrier; see Chart 3.10.10.

Chart 3.10.10 Barriers to exporting – Business Profiles

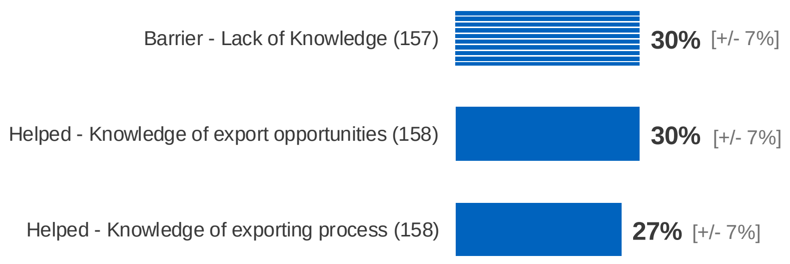


Qbarrier - On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier is each of the following for your business when it comes to exporting? Base: All respondents that used Business Profiles, except those giving a 'not applicable' answer

Businesses that sold goods overseas online were more likely to say that cost was a barrier than those that did not sell goods online (33% and 15% respectively). Businesses that only sold services were more likely to say that a lack of knowledge was a barrier than those that only sold goods (46% compared to 24%).

Chart 3.10.11 shows a comparison of responses to the question on lack of knowledge as a barrier to exporting with business perceptions of how DIT helped them (by increasing their knowledge of export opportunities available and of the exporting process). Three in ten (30%) said that lack of knowledge was a barrier to exporting. Similar proportions said Business Profiles helped them increase their knowledge of export opportunities available (30%) or helped them increase their knowledge of the exporting process (27%).

Chart 3.10.11 Barriers to exporting and how DIT helped – Business Profiles



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 Business Profiles, except those giving a 'not applicable' answer
Qknowchange - Using the same scale as before, thinking about your experience of [SERVICE], to what extent did it help you to…Increase your knowledge of export opportunities available / Increase your knowledge of the process of exporting. Base: All respondents who used Business Profiles

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).

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)[41].

Levels of satisfaction varied considerably between the different services and products, as shown in Table 4.1. Users of TAP were most likely to be satisfied (89%), followed by users of OMIS (78%), Sector Teams (78%), Missions (77%), ITAs (76%) and Posts (73%). By contrast, just under half of users of Export Opportunities were satisfied (45%), while satisfaction was lowest for Business Profiles (35%). Users of Business Profiles were as likely to be dissatisfied as satisfied (32% compared with 35%).

Table 4.1: Satisfaction with overall experience, by product or service

	Non-digital						
	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector Teams
Satisfied	89%	76%	77%	58%	78%	73%	78%
Neutral	10%	19%	19%	27%	14%	16%	15%
Dissatisfied	1%	4%	4%	16%	7%	9%	6%
Don't know	0%	1%	0%	0%	1%	1%	*
Unweighted base	366	1,982	165	150	139	725	500

	Digital		
	Webinars	Export Opportunities	Business Profiles
Satisfied	70%	45%	35%
Neutral	22%	31%	33%
Dissatisfied	8%	23%	32%
Don't know	0%	1%	0%
Unweighted base	325	882	152

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

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

Satisfaction was higher for non-digital services than digital products (76% and 50% satisfied respectively), as shown in Table 4.2. Dissatisfied ratings were also more common for digital products (20%) than for non-digital services (six per cent).

Table 4.2: Satisfaction with overall experience, digital products and non-digital services

	Non-digital	Digital
Satisfied	76%	50%
Neutral	18%	30%
Dissatisfied	6%	20%
Don't know	1%	*
Unweighted base	4,027	1,359

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 4.3, seven services had a positive NPS. TAP had the highest (63), followed by ITAs (35). Two services/products had a negative NPS: Export Opportunities (- 22) and Business Profiles (- 36), while the NPS for OBNI was zero.

Table 4.3: Net promoter score (NPS), by product or service

	Non-digital						
	TAP	**ITAs**	**Missions**	**OBNI**	**OMIS**	**Posts**	**Sector Teams**
Promoters	70%	54%	47%	34%	43%	47%	41%
Neutral	21%	27%	30%	30%	32%	31%	37%
Detractors	7%	18%	22%	34%	21%	20%	18%
Don't know	2%	1%	1%	2%	4%	3%	4%
NPS	63	35	25	0	22	27	22
Unweighted base	369	2,001	167	154	141	748	522

	Digital		
	Webinars	**Export Opportunities**	**Business Profiles**
Promoters	42%	22%	18%
Neutral	35%	33%	23%
Detractors	22%	44%	54%
Don't know	1%	1%	5%
NPS	19	-22	-36
Unweighted base	333	893	158

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 (50%), while 19% were ‘Detractors’. Digital products had a much lower NPS (-14). Just over a quarter of businesses (26%) were ‘Promoters’ of digital products, while 40% were ‘Detractors’.

Table 4.4: Net promoter score (NPS), digital products and non-digital services

	Non-digital	Digital
Promoters	50%	26%
Neutral	30%	32%
Detractors	19%	40%
Don't know	2%	1%
NPS	**31**	**-14**
Unweighted base	4,102	1,384

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 4.5, businesses were most likely to rate TAP as ‘good’ in meeting their needs (82% gave a score of seven or more out of ten), while around two-thirds gave ‘good’ ratings for Posts (68%), ITAs (67%), Missions (67%), Sector Teams (67%) and OMIS (65%). Fewer than four in ten gave ‘good’ ratings for Export Opportunities (38%) and Business Profiles (35%).

Table 4.5: Rating of whether overall service met their needs, by product or service

	Non-digital						
	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector Teams
Good	82%	67%	67%	53%	65%	68%	67%
Neutral	15%	24%	26%	27%	28%	22%	22%
Poor	2%	9%	7%	19%	6%	9%	11%
Don't know	1%	1%	0%	1%	1%	1%	*
Unweighted base	362	1,942	164	146	137	721	490

	Digital		
	Webinars	Export Opportunities	Business Profiles
Good	62%	38%	35%
Neutral	25%	33%	31%
Poor	12%	28%	34%
Don't know	1%	1%	0%
Unweighted base	317	860	146

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

The majority of businesses that used non-digital services said they were good at meeting their needs (67% gave a score of seven or more out of ten), while the proportion was much lower for digital products (43% good). A quarter of businesses (24%) 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.

Table 4.6: Rating of whether overall service met their needs, digital products and non-digital services

	Non-digital	Digital
Good	67%	43%
Neutral	23%	31%
Poor	9%	25%
Don't know	1%	1%
Unweighted base	3,962	1,323

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 assesses 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 37% for users of Business Profiles to 14% for users of Posts and Webinars.

At the other extreme, some businesses started using a DIT (or UKTI) service more than five years ago, ranging from 34% for users of Webinars to 15% of users of Business Profiles.

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

	Non-digital						
	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector Teams
This was the first time	23%	24%	24%	29%	22%	14%	16%
Less than 1 year	18%	18%	16%	15%	12%	16%	14%
Between 1 and 5 years	30%	31%	29%	28%	33%	32%	31%
More than 5 years	23%	22%	24%	23%	30%	31%	29%
Don't know	7%	5%	8%	5%	3%	7%	10%
Unweighted base	369	2,001	167	154	141	748	522

	Digital		
	Webinars	Export Opportunities	Business Profiles
This was the first time	15%	22%	37%
Less than 1 year	10%	19%	26%
Between 1 and 5 years	31%	38%	19%
More than 5 years	32%	18%	15%
Don't know	12%	4%	4%
Unweighted base	333	893	158

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 Business Profiles, the most common way of finding out about DIT was through contacts in the private sector, with the highest proportion among users of TAP (30%). The most common way of finding out about DIT among users of Business Profiles was from online searches (17%).

Users of Webinars were the most likely to have had previous knowledge or experience of DIT or UKTI (15%). Users of Webinars and OBNI were the most likely to say they received a direct call or email from someone at DIT (both eight per cent).

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

	Non-digital						
	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector Teams
Contacts in the private sector	30%	19%	18%	20%	16%	18%	18%
Contacts in the public sector	8%	8%	15%	10%	13%	16%	11%
Searched online	2%	9%	7%	16%	9%	6%	4%
Direct call from an international trade advisor	3%	5%	4%	1%	3%	3%	3%
UK trade fair	4%	3%	1%	3%	1%	4%	6%
Previous experience / knowledge / company use	12%	8%	13%	6%	13%	11%	14%
Direct call/email from DIT	1%	6%	7%	8%	4%	3%	4%
Unweighted base	369	2,001	167	154	141	748	522

	Digital		
	Webinars	Export Opportunities	Business Profiles
Contacts in the private sector	12%	18%	12%
Contacts in the public sector	14%	12%	6%
Searched online	10%	16%	17%
Direct call from an international trade advisor	2%	2%	5%
UK trade fair	1%	3%	2%
Previous experience / knowledge / company use	14%	7%	5%
Direct call/email from DIT	8%	5%	6%
Unweighted base	333	893	158

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 (47%). Users of Business Profiles (73%) and OMIS (70%) were the most likely to say they recalled seeing any advertising from the campaign.

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

	Non-digital						
	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector Teams
Yes	47%	61%	66%	60%	70%	62%	67%
No	52%	38%	34%	39%	30%	37%	31%
Don't know	1%	1%	0%	1%	1%	1%	2%
Unweighted base	369	2,001	167	154	141	748	522

	Digital		
	Webinars	Export Opportunities	Business Profiles
Yes	56%	63%	73%
No	42%	36%	26%
Don't know	3%	1%	1%
Unweighted base	333	893	158

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

6 Annex 1 – Firmographic Profile of Businesses

6.1 TAP

Table 6.1.1 Organisation's annual turnover – TAP

	TAP	CI (+/-%)
Below £83,000 (Below VAT registered)	20%	4.1
£83,000 up to £499,999	24%	4.4
£500,000 up to £1,999,999	21%	4.2
£2 million up to £4,999,999	12%	3.4
£5 million up to £9,999,999	7%	2.7
£10 million up to £49,999,999	4%	2.2
Over £50 million	*	0.9
Don't know	9%	3.0
Refused	3%	1.9
Below £500,000	43%	5.1
£500,000 or over	44%	5.1

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of TAP (369)

Table 6.1.2 Proportion of turnover accounted for by exports - TAP

	TAP	CI (+/-%)
None	16%	3.9
Up to 5%	6%	2.5
6 - 10%	9%	3.0
11 - 15%	3%	1.9
16 - 25%	9%	2.9
26 - 50%	17%	3.9
51 - 75%	14%	3.6
76 - 99%	16%	3.8
100%	6%	2.5
Don't know	3%	1.9
Refused	*	1.0

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of TAP, excluding businesses who responded ‘don’t know’ when asked whether the business exports at Qexportstatus (369)

Table 6.1.3 Number of employees on the organisation's pay roll – TAP

	TAP	CI (+/-%)
0-9 (Micro)	58%	5.1
10-49 (Small)	31%	4.7
50-249 (Medium)	10%	3.1
250+ (Large)	*	0.8
Don't know	2%	1.5
0 to 249 (SME)	98%	1.6
250+ (Large)	*	0.8

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of TAP (369)

Table 6.1.4 What sector the organisation is in - TAP

	TAP	CI (+/-%)
Agriculture, forestry or fishing	8%	3.0
Mining and quarrying	*	1.1
Electricity, gas, steam, and air conditioning supply	*	0.9
Water supply, sewerage, waste management and remediation services	1%	1.1
Manufacturing	36%	5.2
Construction	2%	1.5
Wholesale and retail trade	18%	4.1
Hotels and restaurants	2%	1.8
Transport and storage	1%	1.1
Information and communication	1%	1.2
Finance and insurance	*	1.0
Real estate activities	0%	0.0
Professional, scientific and technical activities	1%	1.2
Administrative and support service activities	*	1.0
Education	5%	2.5
Health and social work	3%	1.9
Public administration and defence	*	1.1
Arts, Entertainment and Recreation	18%	4.2
Any other activity	3%	1.9
Don't know	*	1.1

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of TAP, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (335)

Table 6.1.5 Length of time the business has been trading – TAP

	TAP	CI (+/-%)
Less than 1 year	5%	2.4
More than 1, up to 5 years	29%	4.7
More than 5, up to 10 years	21%	4.2
More than 10 years	45%	5.1
Don't know	1%	1.0

Base: All users of TAP (369)

Table 6.1.6 Export status: current exporter, lapsed exported – TAP

	TAP	CI (+/-%)
Sustain	86%	3.7
Reassure	3%	2.1
Promote	11%	3.3
Don't know	0%	0.0

Base: All users of TAP (369)

Table 6.1.7 Plans to sell overseas (if not currently exporting) - TAP

	TAP	CI (+/-%)
In next 12 months	75%	11.3
Further in future	14%	9.0
Maybe	6%	7.1
No plans	0%	0.0
Don't know	6%	7.3

Base: All users of TAP who do not currently export (57)

Table 6.1.8 Net promoter score - TAP

	TAP	CI (+/-%)
Promoters	70%	5.4
Neutral	21%	4.8
Detractors	7%	3.4
Don't know	1%	1.6
NET PROMOTER SCORE (NPS)	+63	7.5

Base: All users of TAP (369)

Table 6.1.9 Satisfaction with the service - TAP

	TAP	CI (+/-%)
Satisfied	89%	3.8
Neutral	10%	3.7
Dissatisfied	1%	1.4
Don't know	0%	0.0

Base: All users of TAP, excluding ‘not applicable’ responses (366)

6.2 ITAs

Table 6.2.1 Organisation's annual turnover – ITAs

	ITAs	CI (+/-%)
Below £83,000 (Below VAT registered)	18%	1.8
£83,000 up to £499,999	23%	2.0
£500,000 up to £1,999,999	20%	1.9
£2 million up to £4,999,999	11%	1.5
£5 million up to £9,999,999	7%	1.4
£10 million up to £49,999,999	7%	1.5
£50 million or over	2%	0.7
Don't know	8%	1.2
Refused	4%	0.9
Below £500,000	41%	2.4
£500,000 or over	47%	2.4

Base: All users of ITAs (2001)

Table 6.2.2 Proportion of turnover accounted for by exports - ITAs

	ITAs	CI (+/-%)
None	22%	2.0
Up to 5%	11%	1.4
6 - 10%	11%	1.5
11 - 15%	5%	1.0
16 - 25%	9%	1.3
26 - 50%	18%	1.9
51 - 75%	10%	1.5
76 - 99%	9%	1.3
100%	3%	0.8
Don't know	3%	0.9
Refused	*	*

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of ITAs, excluding businesses who responded ‘don’t know’ when asked whether the business exports at Qexportstatus (1996)

Table 6.2.3 Number of employees on the organisation's pay roll – ITAs

	ITAs	CI (+/-%)
0-9 (Micro)	59%	2.4
10-49 (Small)	27%	2.2
50-249 (Medium)	10%	1.6
250+ (Large)	3%	0.8
Don't know	1%	0.6
0 to 249 (SME)	96%	0.9
250+ (Large)	3%	0.8

Base: All users of ITAs (2001)

Table 6.2.4 What sector the organisation is in – ITAs

	ITAs	CI (+/-%)
Agriculture, forestry or fishing	2%	0.7
Mining and quarrying	0%	0.0
Electricity, gas, steam, and air conditioning supply	1%	0.6
Water supply, sewerage, waste management and remediation services	*	*
Manufacturing	36%	2.7
Construction	4%	1.1
Wholesale and retail trade	22%	2.2
Hotels and restaurants	2%	0.7
Transport and storage	1%	0.5
Information and communication	1%	0.5
Finance and insurance	1%	0.6
Real estate activities	*	*
Professional, scientific and technical activities	2%	0.9
Administrative and support service activities	1%	*
Education	6%	1.2
Health and social work	5%	1.2
Public administration and defence	2%	0.8
Arts, Entertainment and Recreation	9%	1.4
Any other activity	5%	1.1
Don't know	*	*

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of ITAs, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (1601)

Table 6.2.5 Length of time the business has been trading – ITAs

	ITAs	CI (+/-%)
Less than 1 year	5%	0.9
More than 1, up to 5 years	25%	2.0
More than 5, up to 10 years	18%	1.9
More than 10 years	51%	2.4
Don't know	1%	*

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of ITAs (2001)

Table 6.2.6 Export status: current exporter, lapsed exported - ITAs

	ITAs	CI (+/-%)
Sustain	81%	1.9
Reassure	3%	0.9
Promote	15%	1.7
Don't know	*	*

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of ITAs (2001)

Table 6.2.7 Plans to sell overseas (if not currently exporting) - ITAs

	ITAs	CI (+/-%)
In next 12 months	72%	4.5
Further in future	13%	3.4
Maybe	4%	2.1
No plans	8%	2.8
Don't know	2%	1.4

Base: All users of ITAs who do not currently export (416)

Table 6.2.8 Net promoter score - ITAs

	ITAs	CI (+/-%)
Promoters	54%	2.6
Neutral	27%	2.3
Detractors	18%	2.2
Don't know	1%	*
NET PROMOTER SCORE (NPS)	+35	4.2

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of ITAs (2001)

Table 6.2.9 Satisfaction with the service - ITAs

	ITAs	CI (+/-%)
Satisfied	76%	2.3
Neutral	19%	2.2
Dissatisfied	4%	1.0
Don't know	*	*

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of ITAs, excluding ‘not applicable’ responses (1982)

6.3 Missions

Table 6.3.1 Organisation's annual turnover – Missions

	Missions	CI (+/-%)
Below £83,000 (Below VAT registered)	9%	4.6
£83,000 up to £499,999	16%	5.7
£500,000 up to £1,999,999	20%	6.3
£2 million up to £4,999,999	10%	4.7
£5 million up to £9,999,999	11%	9.6
£10 million up to £49,999,999	11%	5.1
£50 million or over	7%	4.3
Don't know	8%	4.4
Refused	7%	4.1
Below £500,000	26%	7.0
£500,000 or over	60%	8.2

Base: All users of Missions (167)

Table 6.3.2 Proportion of turnover accounted for by exports - Missions

	Missions	CI (+/-%)
None	21%	6.4
Up to 5%	12%	5.1
6 - 10%	10%	5.0
11 - 15%	5%	12.2
16 - 25%	11%	5.3
26 - 50%	15%	5.6
51 - 75%	9%	4.5
76 - 99%	10%	4.8
100%	2%	2.1
Don't know	2%	2.7
Refused	1%	2.7

Base: All users of Missions, excluding businesses who responded ‘don’t know’ when asked whether the business exports at Qexportstatus (167)

Table 6.3.3 Number of employees on the organisation's pay roll – Missions

	Missions	CI (+/-%)
0-9 (Micro)	33%	7.7
10-49 (Small)	28%	7.1
50-249 (Medium)	19%	9.3
250+ (Large)	18%	6.3
Don't know	2%	2.7
0 to 249 (SME)	80%	6.5
250+ (Large)	18%	6.3

Base: All users of Missions (167)

Table 6.3.4 What sector the organisation is in – Missions

	Missions	CI (+/-%)
Agriculture, forestry or fishing	1%	2.6
Mining and quarrying	1%	2.0
Electricity, gas, steam, and air conditioning supply	3%	4.2
Water supply, sewerage, waste management and remediation services	0%	0.0
Manufacturing	26%	8.1
Construction	11%	12.6
Wholesale and retail trade	2%	2.3
Hotels and restaurants	1%	2.4
Transport and storage	2%	2.9
Information and communication	0%	0.0
Finance and insurance	7%	5.1
Real estate activities	0%	0.0
Professional, scientific and technical activities	2%	2.9
Administrative and support service activities	1%	3.4
Education	14%	6.5
Health and social work	13%	6.0
Public administration and defence	6%	4.5
Arts, Entertainment and Recreation	6%	4.6
Any other activity	4%	3.6
Don't know	0%	0.0

Base: All users of All users of Missions, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (126)

Table 6.3.5 Length of time the business has been trading – Missions

	Missions	CI (+/-%)
Less than 1 year	4%	3.0
More than 1, up to 5 years	21%	6.5
More than 5, up to 10 years	16%	5.8
More than 10 years	57%	8.3
Don't know	1%	2.4

Base: All users of Missions (167)

Table 6.3.6 Export status: current exporter, lapsed exported - Missions

	Missions	CI (+/-%)
Sustain	84%	5.8
Reassure	2%	2.8
Promote	15%	5.4
Don't know	0%	0.0

Base: All users of Missions (167)

Table 6.3.7 Plans to sell overseas (if not currently exporting) - Missions

	Missions	CI (+/-%)
In next 12 months	65%	16.2
Further in future	14%	11.7
Maybe	3%	10.0
No plans	18%	14.4
Don't know	0%	0.0

Base: All users of Missions who do not currently export (33)

Table 6.3.8 Net promoter score - Missions

	Missions	CI (+/-%)
Promoters	47%	8.5
Neutral	30%	7.9
Detractors	22%	7.8
Don't know	1%	1.9
NET PROMOTER SCORE (NPS)	+25	14.3

Base: All users of Missions (167)

Table 6.3.9 Satisfaction with the service - Missions

	Missions	CI (+/-%)
Satisfied	77%	7.9
Neutral	19%	7.6
Dissatisfied	4%	3.7
Don't know	0%	0.0

Base: All users of Missions, excluding ‘not applicable’ responses (165)

6.4 OBNI

Table 6.4.1 Organisation's annual turnover – OBNI

	OBNI	CI (+/-%)
Below £83,000 (Below VAT registered)	14%	5.6
£83,000 up to £499,999	19%	6.6
£500,000 up to £1,999,999	19%	6.5
£2 million up to £4,999,999	12%	6.3
£5 million up to £9,999,999	8%	4.3
£10 million up to £49,999,999	9%	4.9
£50 million or over	5%	3.4
Don't know	8%	4.6
Refused	6%	3.9
Below £500,000	34%	7.7
£500,000 or over	53%	8.2

Base: All users of OBNI (154)

Table 6.4.2 Proportion of turnover accounted for by exports - OBNI

	OBNI	CI (+/-%)
None	22%	7.3
Up to 5%	8%	4.2
6 - 10%	9%	5.2
11 - 15%	3%	3.2
16 - 25%	10%	5.4
26 - 50%	19%	6.3
51 - 75%	12%	5.3
76 - 99%	12%	5.5
100%	3%	2.9
Don't know	1%	2.5
Refused	1%	2.0

Base: All users of Sector Teams, excluding businesses who responded 'don't know' when asked whether the business exports at Qexportstatus (153)

Table 6.4.3 Number of employees on the organisation's pay roll – OBNI

	OBNI	CI (+/-%)
0-9 (Micro)	54%	8.2
10-49 (Small)	24%	7.4
50-249 (Medium)	13%	5.7
250+ (Large)	5%	3.5
Don't know	3%	2.9
0 to 249 (SME)	92%	4.3
250+ (Large)	5%	3.5

Base: All users of OBNI (154)

Table 6.4.4 What sector the organisation is in – OBNI

	OBNI	CI (+/-%)
Agriculture, forestry or fishing	0%	0.0
Mining and quarrying	0%	0.0
Electricity, gas, steam, and air conditioning supply	4%	6.6
Water supply, sewerage, waste management and remediation services	*	1.7
Manufacturing	25%	7.3
Construction	4%	3.8
Wholesale and retail trade	22%	7.4
Hotels and restaurants	2%	5.1
Transport and storage	1%	2.6
Information and communication	3%	3.4
Finance and insurance	1%	2.6
Real estate activities	0%	0.0
Professional, scientific and technical activities	4%	3.6
Administrative and support service activities	1%	2.2
Education	8%	4.9
Health and social work	10%	5.4
Public administration and defence	1%	2.0
Arts, Entertainment and Recreation	8%	5.0
Any other activity	4%	3.5
Don't know	1%	2.6

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of All users of OBNI, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (134)

Table 6.4.5 Length of time the business has been trading – OBNI

	OBNI	CI (+/-%)
Less than 1 year	7%	4.1
More than 1, up to 5 years	27%	7.7
More than 5, up to 10 years	17%	6.4
More than 10 years	47%	8.2
Don't know	1%	2.3

Base: All users of OBNI (154)

Table 6.4.6 Export status: current exporter, lapsed exported - OBNI

	OBNI	CI (+/-%)
Sustain	80%	7.1
Reassure	3%	3.0
Promote	18%	6.9
Don't know	0%	0.0

Base: All users of OBNI (154)

Table 6.4.7 Plans to sell overseas (if not currently exporting) - OBNI

	OBNI	CI (+/-%)
In next 12 months	75%	15.7
Further in future	22%	15.1
Maybe	0%	0.0
No plans	3%	9.7
Don't know	0%	0.0

Base: All users of OBNI who do not currently export (30)

Table 6.4.8 Net promoter score - OBNI

	OBNI	CI (+/-%)
Promoters	34%	8.5
Neutral	30%	8.9
Detractors	34%	8.3
Don't know	2%	2.3
NET PROMOTER SCORE (NPS)	+0.3	14.3

Base: All users of OBNI (154)

Table 6.4.9 Satisfaction with the service - OBNI

	OBNI	CI (+/-%)
Satisfied	58%	9.0
Neutral	27%	7.6
Dissatisfied	16%	7.1
Don't know	0%	0.0

Base: All users of OBNI, excluding ‘not applicable’ responses (150)

6.5 OMIS

Table 6.5.1 Organisation's annual turnover - OMIS

	OMIS	CI (+/-%)
Below £83,000 (Below VAT registered)	7%	4.2
£83,000 up to £499,999	13%	5.8
£500,000 up to £1,999,999	14%	6.0
£2 million up to £4,999,999	13%	10.6
£5 million up to £9,999,999	6%	4.4
£10 million but not more than £49,999,999	23%	7.8
£50 million or over	6%	4.3
Don't know	12%	5.6
Refused	6%	4.1
Below £500,000	20%	6.8
£500,000 or over	62%	8.8

Base: All users of OMIS (141)

Table 6.5.2 Proportion of turnover accounted for by exports - OMIS

	OMIS	CI (+/-%)
None	20%	7.1
Up to 5%	5%	3.8
6 - 10%	10%	6.4
11 - 15%	3%	2.9
16 - 25%	10%	10.9
26 - 50%	16%	6.1
51 - 75%	12%	5.7
76 - 99%	15%	5.9
100%	4%	3.6
Don't know	4%	3.4
Refused	2%	2.5

Base: All users of OMIS, excluding businesses who responded ‘don’t know’ when asked whether the business exports at Qexportstatus (141)

Table 6.5.3 Number of employees on the organisation's pay roll – OMIS

	OMIS	CI (+/-%)
0-9 (Micro)	24%	7.4
10-49 (Small)	33%	10.1
50-249 (Medium)	20%	6.9
250+ (Large)	18%	7.5
Don't know	4%	3.3
0 to 249 (SME)	78%	7.9
250+ (Large)	18%	7.5

Base: All users of OMIS (141)

Table 6.5.4 What sector the organisation is in – OMIS

	OMIS	CI (+/-%)
Agriculture, forestry or fishing	1%	2.5
Mining and quarrying	4%	4.5
Electricity, gas, steam, and air conditioning supply	5%	4.6
Water supply, sewerage, waste management and remediation services	3%	5.1
Manufacturing	32%	9.5
Construction	4%	4.6
Wholesale and retail trade	9%	5.9
Hotels and restaurants	0%	0.0
Transport and storage	0%	0.0
Information and communication	1%	2.3
Finance and insurance	6%	4.9
Real estate activities	0%	0.0
Professional, scientific and technical activities	3%	3.6
Administrative and support service activities	0%	0.0
Education	5%	4.5
Health and social work	11%	5.9
Public administration and defence	5%	4.1
Arts, Entertainment and Recreation	6%	4.7
Any other activity	4%	4.3
Don't know	1%	2.9

Base: All users of OMIS, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (109)

Table 6.5.5 Length of time the business has been trading – OMIS

	OMIS	CI (+/-%)
Less than 1 year	3%	3.3
More than 1, up to 5 years	17%	6.4
More than 5, up to 10 years	16%	10.5
More than 10 years	62%	10.0
Don't know	1%	2.2

Base: All users of OMIS (141)

Table 6.5.6 Export status: current exporter, lapsed exported - OMIS

	OMIS	CI (+/-%)
Sustain	81%	6.9
Reassure	2%	3.7
Promote	17%	6.4
Don't know	0%	0.0

Base: All users of OMIS (141)

Table 6.5.7 Plans to sell overseas (if not currently exporting) - OMIS

	OMIS*	CI (+/-%)
In next 12 months	52%	18.0
Further in future	23%	15.8
Maybe	4%	10.7
No plans	22%	15.4
Don't know	0%	0.0

Note: Low base size, please treat results with caution*
Base: All users of OMIS who do not currently export (29)

Table 6.5.8 Net promoter score - OMIS

	OMIS	CI (+/-%)
Promoters	43%	9.8
Neutral	32%	9.1
Detractors	21%	9.0
Don't know	4.1%	3.8
NET PROMOTER SCORE (NPS)	+22	16.5

Base: All users of OMIS (141)

Table 6.5.9 Satisfaction with the service - OMIS

	OMIS	CI (+/-%)
Satisfied	78%	9.1
Neutral	14%	8.0
Dissatisfied	7%	6.3
Don't know	1%	1.9

Base: All users of OMIS, excluding ‘not applicable’ responses (139)

6.6 Posts

Table 6.6.1 Organisation's annual turnover – Posts

	Posts	CI (+/-%)
Below £83,000 (Below VAT registered)	9%	2.1
£83,000 up to £499,999	15%	2.7
£500,000 up to £1,999,999	19%	3.0
£2 million up to £4,999,999	11%	2.4
£5 million up to £9,999,999	8%	2.0
£10 million up to £49,999,999	15%	2.7
£50 million or over	7%	1.8
Don't know	11%	2.4
Refused	5%	1.6
Below £500,000	25%	3.2
£500,000 or over	59%	3.7

Base: All users of Posts (748)

Table 6.6.2 Proportion of turnover accounted for by exports - Posts

	Posts	CI (+/-%)
None	22%	3.0
Up to 5%	10%	2.1
6 - 10%	7%	1.9
11 - 15%	3%	1.2
16 - 25%	9%	2.3
26 - 50%	18%	2.9
51 - 75%	12%	2.6
76 - 99%	12%	2.4
100%	4%	1.5
Don't know	3%	1.3
Refused	1%	0.6

Base: All users of Posts, excluding businesses who responded ‘don’t know’ when asked whether the business exports at Qexportstatus (744)

Table 6.6.3 Number of employees on the organisation's pay roll – Posts

	Posts	CI (+/-%)
0-9 (Micro)	37%	3.6
10-49 (Small)	31%	3.5
50-249 (Medium)	19%	2.9
250+ (Large)	10%	2.3
Don't know	3%	1.3
0 to 249 (SME)	87%	2.5
250+ (Large)	10%	2.3

Base: All users of Posts (748)

Table 6.6.4 What sector the organisation is in – Posts

	Posts	CI (+/-%)
Agriculture, forestry or fishing	2%	1.1
Mining and quarrying	1%	1.0
Electricity, gas, steam, and air conditioning supply	4%	1.7
Water supply, sewerage, waste management and remediation services	*	0.6
Manufacturing	34%	4.0
Construction	4%	1.7
Wholesale and retail trade	13%	2.7
Hotels and restaurants	5%	1.8
Transport and storage	1%	0.9
Information and communication	1%	0.9
Finance and insurance	2%	1.3
Real estate activities	*	0.6
Professional, scientific and technical activities	3%	1.3
Administrative and support service activities	1%	0.8
Education	6%	2.0
Health and social work	8%	2.2
Public administration and defence	6%	2.0
Arts, Entertainment and Recreation	7%	2.0
Any other activity	4%	1.5
Don't know	1%	0.8

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of All users of Posts, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (598)

Table 6.6.5 Length of time the business has been trading – Posts

	Posts	CI (+/-%)
Less than 1 year	5%	1.6
More than 1, up to 5 years	20%	3.0
More than 5, up to 10 years	15%	2.7
More than 10 years	59%	3.7
Don't know	1%	0.9

Base: All users of Posts (748)

Table 6.6.6 Export status: current exporter, lapsed exported - Posts

	Posts	CI (+/-%)
Sustain	82%	2.8
Reassure	2%	1.2
Promote	15%	2.6
Don't know	*	0.9

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of Posts (748)

Table 6.6.7 Plans to sell overseas (if not currently exporting) - Posts

	Posts	CI (+/-%)
In next 12 months	73%	7.0
Further in future	11%	5.1
Maybe	5%	3.7
No plans	10%	4.8
Don't know	1%	2.4

Base: All users of Posts who do not currently export (157)

Table 6.6.8 Net promoter score - Posts

	Posts	CI (+/-%)
Promoters	47%	4.3
Neutral	31%	4.0
Detractors	20%	3.3
Don't know	3%	1.5
NET PROMOTER SCORE (NPS)	+27	6.5

Base: All users of Posts (748)

Table 6.6.9 Satisfaction with the service - Posts

	Posts	CI (+/-%)
Satisfied	73%	4.0
Neutral	16%	3.4
Dissatisfied	9%	2.6
Don't know	1%	1.3

Base: All users of Posts, excluding 'not applicable' responses (725)

6.7 Sector Teams

Table 6.7.1 Organisation's annual turnover – Sector Teams

	Sector Teams	CI (+/-%)
Below £83,000 (Below VAT registered)	9%	2.5
£83,000 up to £499,999	17%	3.4
£500,000 up to £1,999,999	14%	3.0
£2 million up to £4,999,999	11%	3.0
£5 million up to £9,999,999	5%	2.1
£10 million up to £49,999,999	12%	3.1
£50 million or over	13%	3.0
Don't know	10%	3.5
Refused	8%	2.4
Below £500,000	27%	4.0
£500,000 or over	55%	4.6

Base: All users of Sector Teams (522)

Table 6.7.2 Proportion of turnover accounted for by exports – Sector Teams

	Sector Teams	CI (+/-%)
None	30%	4.4
Up to 5%	9%	2.5
6 - 10%	8%	2.3
11 - 15%	3%	1.6
16 - 25%	5%	2.0
26 - 50%	15%	3.6
51 - 75%	9%	2.5
76 - 99%	12%	2.8
100%	5%	1.9
Don't know	3%	1.7
Refused	2%	1.1

Base: All users of Sector Teams, excluding businesses who responded ‘don’t know’ when asked whether the business exports at Qexportstatus (519)

Table 6.7.3 Number of employees on the organisation's pay roll – Sector Teams

	Sector Teams	CI (+/-%)
0-9 (Micro)	37%	4.4
10-49 (Small)	28%	4.1
50-249 (Medium)	19%	4.1
250+ (Large)	14%	3.0
Don't know	3%	1.4
0 to 249 (SME)	83%	3.3
250+ (Large)	14%	3.0

Base: All users of Sector Teams (522)

Table 6.7.4 What sector the organisation is in – Sector Teams

	Sector Teams	CI (+/-%)
Agriculture, forestry or fishing	4%	2.2
Mining and quarrying	1%	1.7
Electricity, gas, steam, and air conditioning supply	1%	1.2
Water supply, sewerage, waste management and remediation services	1%	1.2
Manufacturing	30%	5.6
Construction	8%	3.0
Wholesale and retail trade	8%	2.8
Hotels and restaurants	1%	1.1
Transport and storage	3%	1.9
Information and communication	1%	1.4
Finance and insurance	8%	2.8
Real estate activities	1%	1.4
Professional, scientific and technical activities	4%	2.0
Administrative and support service activities	1%	0.9
Education	5%	2.2
Health and social work	6%	2.5
Public administration and defence	6%	2.3
Arts, Entertainment and Recreation	5%	2.4
Any other activity	7%	2.7
Don't know	1%	1.0

Base: All users of All users of Sector Teams, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (367)

Table 6.7.5 Length of time the business has been trading – Sector Teams

	Sector Teams	CI (+/-%)
Less than 1 year	6%	2.1
More than 1, up to 5 years	20%	3.6
More than 5, up to 10 years	14%	3.0
More than 10 years	59%	4.5
Don't know	2%	1.3

Base: All users of Sector Teams (522)

Table 6.7.6 Export status: current exporter, lapsed exported – Sector Teams

	Sector Teams	CI (+/-%)
Sustain	73%	4.3
Reassure	2%	1.4
Promote	24%	4.2
Don't know	*	0.6

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of Sector Teams (522)

Table 6.7.7 Plans to sell overseas (if not currently exporting) – Sector Teams

	Sector Teams	CI (+/-%)
In next 12 months	43%	8.8
Further in future	18%	6.5
Maybe	8%	4.9
No plans	29%	9.5
Don't know	2%	2.5

Base: All users of Sector Teams who do not currently export (144)

Table 6.7.8 Net promoter score – Sector Teams

	Sector Teams	CI (+/-%)
Promoters	41%	5.3
Neutral	37%	5.2
Detractors	18%	3.6
Don't know	4%	2.3
NET PROMOTER SCORE (NPS)	+22	7.3

Base: All users of Sector Teams (543)

Table 6.7.9 Satisfaction with the service – Sector Teams

	Sector Teams	CI (+/-%)
Satisfied	78%	3.9
Neutral	15%	3.3
Dissatisfied	6%	2.2
Don't know	1%	0.8

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of Sector Teams, excluding ‘not applicable’ responses (500)

6.8 Webinars

Table 6.8.1 Organisation's annual turnover - Webinars

	Webinars	CI (+/-%)
Below £83,000 (Below VAT registered)	13%	3.8
£83,000 up to £499,999	15%	4.0
£500,000 up to £1,999,999	15%	6.4
£2 million up to £4,999,999	7%	2.8
£5 million up to £9,999,999	5%	2.5
£10 million but not more than £49,999,999	8%	3.0
£50 million or over	7%	2.7
Don't know	22%	4.6
Refused	9%	3.2
Below £500,000	28%	5.2
£500,000 or over	41%	6.3

Base: All users of Webinars (333)

Table 6.8.2 Proportion of turnover accounted for by exports - Webinars

	Webinars	CI (+/-%)
None	22%	4.7
Up to 5%	16%	6.4
6 - 10%	6%	2.6
11 - 15%	2%	1.7
16 - 25%	3%	2.0
26 - 50%	14%	3.9
51 - 75%	13%	3.7
76 - 99%	11%	3.4
100%	4%	2.4
Don't know	5%	2.6
Refused	2%	1.5

Base: All users of Webinars, excluding businesses who responded 'don't know' when asked whether the business exports at Qexportstatus (333)

Table 6.8.3 Number of employees on the organisation's pay roll – Webinars

	Webinars	CI (+/-%)
0-9 (Micro)	42%	5.9
10-49 (Small)	21%	6.5
50-249 (Medium)	16%	4.0
250+ (Large)	12%	3.6
Don't know	9%	3.2
0 to 249 (SME)	79%	4.6
250+ (Large)	12%	3.6

Base: All users of Webinars (333)

Table 6.8.4 What sector the organisation is in - Webinars

	Webinars	CI (+/-%)
Agriculture, forestry or fishing	1%	1.5
Mining and quarrying	*	1.4
Electricity, gas, steam, and air conditioning supply	1%	1.8
Water supply, sewerage, waste management and remediation services	*	0.8
Manufacturing	37%	6.0
Construction	1%	1.4
Wholesale and retail trade	22%	5.3
Hotels and restaurants	6%	3.0
Transport and storage	2%	1.8
Information and communication	2%	2.0
Finance and insurance	*	1.5
Real estate activities	0%	0.0
Professional, scientific and technical activities	2%	2.0
Administrative and support service activities	*	1.4
Education	6%	3.0
Health and social work	4%	2.7
Public administration and defence	4%	2.5
Arts, Entertainment and Recreation	5%	2.7
Any other activity	4%	2.6
Don't know	2%	1.9

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of Webinars, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (258)

Table 6.8.5 Length of time the business has been trading – Webinars

	Webinars	CI (+/-%)
Less than 1 year	6%	2.5
More than 1, up to 5 years	16%	4.1
More than 5, up to 10 years	12%	3.7
More than 10 years	63%	5.6
Don't know	3%	2.0

Base: All users of Webinars (333)

Table 6.8.6 Export status: current exporter, lapsed exported - Webinars

	Webinars	CI (+/-%)
Sustain	80%	4.6
Reassure	2%	1.8
Promote	16%	4.1
Don't know	2%	1.8

Base: All users of Webinars (333)

Table 6.8.7 Plans to sell overseas (if not currently exporting) - Webinars

	Webinars	CI (+/-%)
In next 12 months	52%	11.8
Further in future	13%	8.2
Maybe	8%	7.9
No plans	23%	10.0
Don't know	4%	5.3

Base: All users of Webinars who do not currently export (70)

Table 6.8.8 Net promoter score - Webinars

	Webinars	CI (+/-%)
Promoters	42%	6.4
Neutral	35%	6.4
Detractors	22%	5.0
Don't know	1%	1.1
NET PROMOTER SCORE (NPS)	+19	9.6

Base: All users of Webinars (333)

Table 6.8.9 Satisfaction with the service - Webinars

	Webinars	CI (+/-%)
Satisfied	70%	6.0
Neutral	22%	5.6
Dissatisfied	8%	3.4
Don't know	0%	0.0

Base: All users of Webinars, excluding ‘not applicable’ responses (333)

6.9 Export Opportunities

Table 6.9.1 Organisation's annual turnover - Export Opportunities

	Export Opportunities	CI (+/-%)
Below £83,000 (Below VAT registered)	18%	3.2
£83,000 up to £499,999	21%	2.9
£500,000 up to £1,999,999	16%	2.7
£2 million up to £4,999,999	14%	2.8
£5 million up to £9,999,999	5%	1.6
£10 million up to £49,999,999	8%	1.9
£50 million or over	4%	1.6
Don't know	7%	1.8
Refused	7%	2.0
Below £500,000	39%	3.7
£500,000 or over	47%	3.8

Base: All users of Export Opportunities (893)

Table 6.9.2 Proportion of turnover accounted for by exports - Export Opportunities

	Export Opportunities	CI (+/-%)
None	26%	3.2
Up to 5%	14%	2.6
6 - 10%	8%	1.9
11 - 15%	4%	1.6
16 - 25%	8%	2.0
26 - 50%	15%	2.7
51 - 75%	9%	2.3
76 - 99%	7%	1.8
100%	5%	2.4
Don't know	2%	1.0
Refused	1%	1.1

Base: All users of Export Opportunities, excluding businesses who responded ‘don’t know’ when asked whether the business exports at Qexportstatus (891)

Table 6.9.3 Number of employees on the organisation's pay roll - Export Opportunities

	Export Opportunities	CI (+/-%)
0-9 (Micro)	55%	3.8
10-49 (Small)	25%	3.3
50-249 (Medium)	13%	2.5
250+ (Large)	6%	1.7
Don't know	2%	1.0
0 to 249 (SME)	93%	2.0
250+ (Large)	6%	1.7

Base: All users of Export Opportunities (893)

Table 6.9.4 What sector the organisation is in - Export Opportunities

	Export Opportunities	CI (+/-%)
Agriculture, forestry or fishing	3%	2.7
Mining and quarrying	*	*
Electricity, gas, steam, and air conditioning supply	2%	1.5
Water supply, sewerage, waste management and remediation services	*	0.5
Manufacturing	29%	4.0
Construction	4%	1.7
Wholesale and retail trade	18%	3.1
Hotels and restaurants	3%	1.3
Transport and storage	1%	0.9
Information and communication	2%	1.0
Finance and insurance	1%	0.9
Real estate activities	0%	0.0
Professional, scientific and technical activities	3%	1.2
Administrative and support service activities	1%	1.5
Education	11%	2.5
Health and social work	4%	1.9
Public administration and defence	4%	1.9
Arts, Entertainment and Recreation	6%	2.1
Any other activity	6%	2.2
Don't know	*	0.6

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of Export Opportunities, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (687)

Table 6.9.5 Length of time the business has been trading – Export Opportunities

	Export Opportunities	CI (+/-%)
Less than 1 year	4%	1.3
More than 1, up to 5 years	29%	3.5
More than 5, up to 10 years	16%	2.8
More than 10 years	50%	3.8
Don't know	1%	0.5

Base: All users of Export Opportunities (893)

Table 6.9.6 Export status: current exporter, lapsed exported - Export Opportunities

	Export Opportunities	CI (+/-%)
Sustain	78%	3.0
Reassure	3%	1.3
Promote	18%	2.7
Don't know	1%	1.3

Base: All users of Export Opportunities (893)

Table 6.9.7 Plans to sell overseas (if not currently exporting) - Export Opportunities

	Export Opportunities	CI (+/-%)
In next 12 months	68%	7.0
Further in future	17%	6.4
Maybe	8%	3.6
No plans	5%	3.1
Don't know	1%	1.7

Base: All users of Export Opportunities who do not currently export (219)

Table 6.9.8 Net promoter score - Export Opportunities

	Export Opportunities	CI (+/-%)
Promoters	22%	3.3
Neutral	33%	4.0
Detractors	44%	4.1
Don't know	1%	0.7
NET PROMOTER SCORE (NPS)	-22	6.3

Base: All users of Export Opportunities (893)

Table 6.9.9 Satisfaction with the service - Export Opportunities

	Export Opportunities	CI (+/-%)
Satisfied	45%	4.2
Neutral	31%	3.8
Dissatisfied	23%	3.8
Don't know	*	*

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Base: All users of Export Opportunities, excluding 'not applicable' responses (882)

6.10 Business Profiles

Table 6.10.1 Organisation's annual turnover - Business Profiles

	Business Profiles	CI (+/-%)
Below £83,000 (Below VAT registered)	13%	5.3
£83,000 up to £499,999	37%	7.9
£500,000 up to £1,999,999	16%	5.9
£2 million up to £4,999,999	10%	4.7
£5 million up to £9,999,999	5%	3.6
£10 million up to £49,999,999	6%	3.8
£50 million or over	1%	2.4
Don't know	8%	4.8
Refused	5%	3.8
Below £500,000	49%	8.0
£500,000 or over	37%	7.7

Base: All users of Business Profiles (158)

Table 6.10.2 Proportion of turnover accounted for by exports - Business Profiles

	Business Profiles	CI (+/-%)
None	28%	7.4
Up to 5%	11%	5.2
6 - 10%	8%	4.3
11 - 15%	3%	3.1
16 - 25%	9%	4.6
26 - 50%	15%	5.8
51 - 75%	7%	4.0
76 - 99%	12%	5.3
100%	3%	3.0
Don't know	3%	3.8
Refused	1%	2.4

Base: All users of Business Profiles, excluding businesses who responded 'don't know' when asked whether the business exports at Qexportstatus (158)

Table 6.10.3 Number of employees on the organisation's pay roll - Business Profiles

	Business Profiles	CI (+/-%)
0-9 (Micro)	62%	7.7
10-49 (Small)	22%	6.6
50-249 (Medium)	11%	4.9
250+ (Large)	1%	2.6
Don't know	3%	3.4
0 to 249 (SME)	96%	3.8
250+ (Large)	1%	2.6

Base: All users of Business Profiles (158)

Table 6.10.4 What sector the organisation is in - Business Profiles

	Business Profiles	CI (+/-%)
Agriculture, forestry or fishing	1%	3.3
Mining and quarrying	0%	0.0
Electricity, gas, steam, and air conditioning supply	3%	3.6
Water supply, sewerage, waste management and remediation services	0%	0.0
Manufacturing	34%	8.8
Construction	4%	4.0
Wholesale and retail trade	20%	8.1
Hotels and restaurants	1%	2.4
Transport and storage	0%	0.0
Information and communication	1%	3.0
Finance and insurance	2%	3.3
Real estate activities	0%	0.0
Professional, scientific and technical activities	4%	3.8
Administrative and support service activities	2%	3.3
Education	5%	4.0
Health and social work	6%	4.8
Public administration and defence	3%	3.5
Arts, Entertainment and Recreation	6%	4.8
Any other activity	8%	5.5
Don't know	1%	2.8

Base: All users of Business Profiles, not including businesses whose sector is not in the UK Standard Industrial Classification (SIC) (113)

Table 6.10.5 Length of time the business has been trading – Business Profiles

	Business Profiles	CI (+/-%)
Less than 1 year	8%	4.3
More than 1, up to 5 years	30%	7.8
More than 5, up to 10 years	18%	6.0
More than 10 years	43%	7.9
Don't know	1%	2.5

Base: All users of Business Profiles (158)

Table 6.10.6 Export status: current exporter, lapsed exported - Business Profiles

	Business Profiles	CI (+/-%)
Sustain	77%	7.0
Reassure	1%	2.0
Promote	22%	7.0
Don't know	0%	0.0

Base: All users of Business Profiles (158)

Table 6.10.7 Plans to sell overseas (if not currently exporting) - Business Profiles

	Business Profiles	CI (+/-%)
In next 12 months	58%	16.8
Further in future	32%	16.9
Maybe	5%	8.4
No plans	5%	8.6
Don't know	0%	0.0

Base: All users of Business Profiles who do not currently export (38)

Table 6.10.8 Net promoter score - Business Profiles

	Business Profiles	CI (+/-%)
Promoters	18%	7.4
Neutral	23%	7.4
Detractors	54%	8.8
Don't know	4%	3.0
NET PROMOTER SCORE (NPS)	-36	14.5

Base: All users of Business Profiles (158)

Table 6.10.9 Satisfaction with the service - Business Profiles

	Business Profiles	CI (+/-%)
Satisfied	35%	8.8
Neutral	33%	8.8
Dissatisfied	32%	8.0
Don't know	1%	2.0

Base: All users of Business Profiles, excluding ‘not applicable’ responses (152)

7 Annex 2 – Suggested Improvements to Services

Table 7.1 Suggested improvements to service

	TAP	ITAs	Missions	OBNI	OMIS	Posts	Sector Teams	Webinars	Export Opportunities	Business Profiles
Brexit (all references)	1%	1%	1%	0%	2%	*	1%	2%	*	2%
Communication	10%	14%	21%	18%	21%	12%	12%	8%	28%	28%
Contacts	6%	6%	11%	7%	13%	9%	6%	3%	8%	13%
Cost/funding	24%	11%	7%	12%	10%	7%	4%	1%	2%	1%
Events	9%	5%	4%	6%	2%	2%	6%	10%	*	0%
Information	12%	14%	17%	12%	17%	12%	10%	16%	19%	13%
Opportunities	2%	4%	5%	2%	4%	3%	2%	4%	14%	8%
Service	12%	13%	7%	17%	9%	14%	12%	4%	12%	16%
Staff	5%	13%	10%	9%	11%	15%	12%	7%	6%	3%
Support	7%	14%	10%	19%	12%	12%	9%	5%	10%	9%
Technology	2%	2%	1%	3%	2%	2%	1%	14%	14%	7%
Other	6%	8%	7%	6%	4%	5%	6%	7%	8%	6%
None	30%	22%	21%	18%	24%	31%	25%	23%	15%	14%
Don't know	1%	3%	4%	1%	1%	1%	2%	3%	2%	5%
Unweighted base	312	1653	148	136	118	636	449	333	742	132

Note: An asterisk (*) denotes a value of less than 0.5 per cent.
Source: Qimprove – Thinking about [SAMPLED SERVICE]. In what ways, if any, do you think it could be improved?
Base: All businesses

[inside of the back cover – for printed publications, leave this page blank]

The UK's Department for International Trade (DIT) helps businesses export, drives inward and outward investment, negotiates market access and trade deals, and champions free trade.

Legal disclaimer

Copyright

This document is also available on our website at gov.uk/dit

Any enquiries regarding this publication should be sent to us at

exportclientsurvey@trade.gov.uk

enquiries@trade.gov.uk

Published July 2020 by Department for International Trade