



Department for
Business & Trade

Export client reported impact survey for businesses supported April 2020 to March 2021

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



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1. Executive Summary

1.1. Introduction

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

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

The ECS comprises two linked surveys: a Quality Survey (QS) and a Reported Impact Survey (RIS). This report presents findings from the RIS. The findings are based on 2,184 interviews conducted by Ipsos UK with businesses who used DIT services between April 2020 and March 2021 (2020/21). See Section 2.3, Table 2.3.1, below for descriptions of DIT's export promotion services covered by the ECS.

Businesses were classified as 'Sustain', 'Reassure' or 'Promote' depending on their export status. Changes in status between the QS and the RIS, and differences in the proportion of businesses changing status in RIS 2020/21 compared to RIS 2019/20, are described in subsequent sections.

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

1.2. International Trade Advisers (ITAs)

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was higher compared to the previous year (90%, up from 86% in 2019/20), and higher compared to the QS 2020/21 (90%, up from 84%). Over half (56%) of businesses classified as 'Promote' (i.e. never exported before) in the QS 2020/21 had shifted to 'Sustain' in the RIS 2020/21. This was higher than in the previous year (56%, up from 40% in 2019/20).

One-third (34%) of businesses reported that they had won export contracts with DIT support, in line with the previous year.

The top three changes expected or seen as a result of using the service were safeguarding jobs of existing UK employees (37%), improving job satisfaction of existing UK employees (33%) and increasing export sales per employee (32%).

Compared to these businesses' responses in the QS 2020/21, there were some improvements in terms of barriers. Businesses were less likely to report 'access to contacts' (37%, down from 41% in QS 2020/21) and 'lack of knowledge' (31%, down from 33% in QS 2020/21) as barriers. However, businesses were more likely to report 'cost' (41%, up from 37% in QS 2020/21) and 'capacity to export' (24%, up from 19% in QS 2020/21) as barriers.

Asia replaced Europe as the most common market for increased exposure or business. Compared to the previous year, businesses were more likely to report increased exposure in Asia (53%, up from 38% in RIS 2019/20) and less likely to report increased exposure in Europe (31%, down from 48% in RIS 2019/20).

1.3. Posts

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was similar to the previous year (87% in 2020/21, 91% in 2019/20), but was higher compared to the QS 2020/21 (87%, up from 77%). Around half (48%) of businesses classified as 'Promote' (i.e. never exported before) in the QS 2020/21 had shifted to 'Sustain' in the RIS 2020/21.

One-third (35%) of businesses reported that they had won export contracts with DIT support. This was up from 26% in RIS 2019/20.

The top three changes expected or seen as a result of using the service were safeguarding jobs of existing UK employees (37%), improving job satisfaction of existing UK employees (35%) and increasing export sales per employee (37%).

The top barrier reported in the RIS 2020/21 was 'access to contacts' (39%), followed by 'cost' (31%). 'Lack of knowledge' and 'capacity to export' were both seen as a barrier by around one in four businesses (26% and 24% respectively). These results were in line with the previous year and with responses in the QS 2020/21.

Asia replaced Europe as the most common market for increased exposure or business, with 55% reporting increased exposure in Asia. Compared to the previous year, businesses were less likely to report increased exposure in Europe compared to the previous year (28%, up from 55% in RIS 2019/20), with 20% reporting that their increased exposure or new business was within the European Union (down from 49% in RIS 2019/20).

1.4. Webinars

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was in line with the previous year (85% compared to 81% in RIS 2019/20), and also similar to the QS 2020/21 (86%). There was an increase in the proportion classified as 'Reassure' from two per cent in the QS 2020/21 to seven per cent in the RIS 2020/21. Otherwise, these findings were in line with the previous year.

Almost two in ten (18%) businesses reported that they had won export contracts with DIT support, in line with the previous year.

The top three changes expected or seen as a result of using the service were safeguarding jobs of existing UK employees (28%), improving job satisfaction of existing UK employees (23%) and increasing export sales per employee (21%).

Compared to these businesses' responses in the QS 2020/21, there were some improvements in terms of barriers. Businesses were less likely to report 'access to contacts' (23%, down from 27% in QS 2020/21) and 'lack of knowledge' (24%, down from 32% in QS 2020/21) as barriers. There were no differences when comparing results to the RIS 2019/20.

Compared to the previous year, Asia (43%) replaced Europe (41%) as the most common market for increased exposure or business.

1.5. Export Opportunities

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was in line with the previous year (83% compared to 76% in RIS 2019/20), and also in line with the QS 2020/21 (83% compared to 77%). Over half (54%) of businesses classified as 'Promote' (i.e. never exported before) in the QS 2020/21 had shifted to 'Sustain' in the RIS 2020/21.

Two in ten (19%) businesses reported that they had won export contracts with DIT support, in line with the previous year.

The top three changes expected or seen as a result of using the service were safeguarding jobs of existing UK employees (28%), improving job satisfaction of existing UK employees (22%) and increasing export sales per employee (20%).

The top barrier in RIS 2020/21 was 'access to contacts' (42%), followed by 'cost' (31%). The findings were in line with responses to the QS 2020/21, and the previous RIS (2019/20).

Findings for Overseas Business Network Initiative (OBNI), Missions, Export and Investment Teams (Sector Teams), Business Profiles (previously Find A Buyer), Overseas Market Introduction Service (OMIS) and Selling Online Overseas (SOO) have not been included in this report due to small base sizes.

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



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

2. Introduction

2.1. Background and objectives

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

In 2021, DIT refreshed its Export Strategy¹, based on:

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

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

2.2. The Export Client Survey

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

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

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

This report presents findings from the Reported Impact Survey; this is a telephone survey on the reported impact of using DIT services. The survey covers measures such as reported impact on innovation, research and development (R&D), employment levels, knowledge and confidence of exporting, additional contracts and turnover as a result of using DIT services. The findings in this report are based on 2,184 interviews conducted by Ipsos UK with businesses who used DIT services between April 2020 and March 2021 (2020/21). In this report, when findings from 2020/21 are compared to findings from the 2019/20 survey, these are statistically significantly different at the 95% probability level.

¹ [Export Strategy 2021](#)

2.3. Sample frame and fieldwork

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

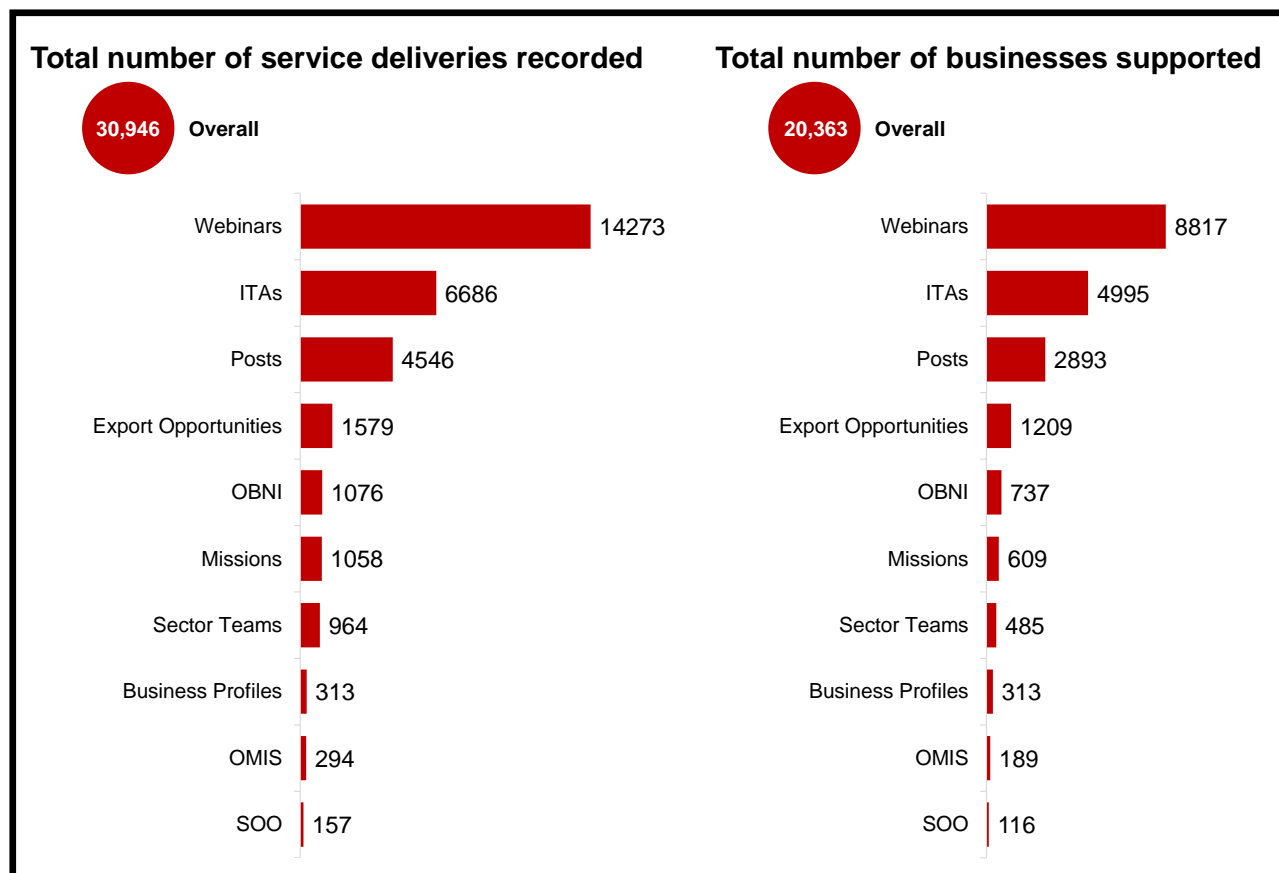
Table 2.3.1 DIT export promotion services

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

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

² Referred to as Sector Teams in 2020/21 sampling and fieldwork (and in this report) but renamed as Export and Investment Teams during 2021.

Chart 2.3.1: Service deliveries recorded and businesses supported, by service type (April 2020 to March 2021)³



The services covered in this report are shown in Table 2.3.2. Some services (those where there were fewer than 100 completed interviews) have not been provided with a product findings chapter in this report due to low sample sizes that would lead to issues around the accuracy, large confidence intervals and confidentiality of results.

Table 2.3.2: Services covered in this report

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

³ All 313 eligible Business Profiles service deliveries corresponded to an individual unique business supported, i.e. all businesses were sampled, and there was no overlap with other services.

3. Methodology

3.1. Sample Design

The Export Client Survey involves two different surveys. First, there is the Quality Survey, which is conducted approximately three months after a business has an interaction with DIT. Then all businesses that completed the Quality Survey (QS) and agreed to recontact for research purposes are included in the Reported Impact Survey (RIS), which is conducted approximately 12 months after the business has an interaction with DIT.

3.1.1. Reported Impact Survey (RIS)

All businesses that completed the Quality Survey and agreed to be recontacted for research purposes were included in the RIS sample.

Fieldwork for the RIS takes place approximately nine months after the business completed the Quality Survey. In effect that means there is a twelve-month break period between when the business interacts with DIT and when the RIS interview is conducted. This ensures sufficient time is lapsed to collect information about reported impact while allowing businesses to be able to recall an event and their business dealings over this period.

Fieldwork for this report began in April 2021 (interviewing businesses who received support from DIT in April 2020 and who participated in the Quality Survey in 2020/21). This report covers DIT services delivered between April 2020 and March 2021. We note that both service delivery and fieldwork took place during the COVID-19 pandemic. The average (mean) interview length was around 16 and a half minutes.

We checked to see whether there was a 'positivity' bias, that is whether those who participated in the RIS were more likely to have reported that they were satisfied with the DIT service delivery (provided a rating of 7 or more out of 10 when asked in the Quality Survey how satisfied they were with the service⁴). Table 3.1.1 compares the proportions of businesses that were satisfied in their dealings with the DIT product or service in the Quality Survey. The column for 'All Quality Survey respondents' presents satisfaction ratings for all who completed the Quality Survey. The column for 'All RIS respondents' presents the Quality Survey satisfaction score for all that completed the RIS. None of the differences in the table are statistically significant (at a 95% confidence level). Therefore, we can conclude that there was not a positivity bias in the sample for the RIS.

⁴ The question asked was: Using the same scale as before, thinking about your overall experience of [SAMPLED SERVICE], how satisfied were you with this service?
[IF NECESSARY]: Please rate the service on a scale of 0 to 10, where 10 is very satisfied and 0 is very dissatisfied.

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

DIT Product or Service	All QS respondents (% satisfied)	All RIS respondents (% satisfied)
International Trade Advisers (ITAs)	80% [+/- 2%]	81% [+/- 3%]
Posts	73% [+/- 4%]	76% [+/- 6%]
Webinars	68% [+/- 2%]	68% [+/- 3%]

3.2. Response rates

Table 3.2.1 below shows response rates achieved between April 2021 and March 2022. Table 3.2.2 breaks this down by DIT product or service. As noted in section 1.3, detailed analysis of several products or services have been excluded from this report as the base size were too low to report on with confidence. We calculated the overall response rate using the American Association for Public Opinion Research standard definitions⁵, an industry standard metric for calculating response rates. As there are no ineligible cases in the RIS fieldwork (as all businesses had completed the QS and agreed to be recontacted) it is easy to calculate response as:

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

We achieved a 67% response rate for interviews conducted between April 2021 and March 2022⁶.

⁵ [Link to the American Association for Public Opinion Research standard definitions](#)

⁶ Based on response rate 3 calculations, which can be found here: [Link to the American Association for Public Opinion Research standard definitions](#). Response rates are calculated by excluding deadwood.

Table 3.2.1 Fieldwork outcomes April 2021 to March 2022

Fieldwork outcomes	Number of cases (N)
Number of cases issued	4,405
Live sample not interviewed	317
Deadwood (uncontactable phone numbers)	1,131
Refusal	773
Ineligible	0
Complete interview	2,184
Response rate	67%

3.2.1. Response rate for each DIT service

Table 3.2.2 Fieldwork outcomes April 2020 to March 2021 (by service)

Outcome	ITAs	Missions	OBNI	OMIS	Posts	Sector Teams	Webinars	Export Opportunities	Business Profiles	Selling Online Overseas
Number of cases issued	1279	117	107	31	511	94	1930	254	55	27
Live sample not interviewed	83	4	7	1	35	8	152	22	3	2
Deadwood	334	33	27	9	155	33	449	70	14	7
Refusal	201	24	18	7	87	20	356	40	14	6
Complete	661	56	55	14	234	33	973	122	24	12
Response rate	70%	67%	69%	64%	66%	54%	66%	66%	59%	60%

3.3. Analysis

Several questions in the survey ask respondents to give a rating using a scale from 0 to 10, where 10 was the most positive response and 0 was the least positive response. Responses have been grouped into positive (a score of seven or higher), neutral (a score of four to six), and negative (a score of three or below). Respondents could also say 'Don't know' or 'Not applicable'. Respondents who said the question did not apply to them were excluded from the analysis. Those who answered 'Don't know' or 'Refused' are included in the charts unless no respondents gave this answer.

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

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

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

In addition, charts and tables represent a statistically significant increase from 2019/20 RIS with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash. Some charts also look at statistically significant changes between the 2020/21 QS and the 2020/21 RIS. These are shown using triangle shaped arrows.

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

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

4. Product Findings

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

Service use took place between April 2020 and March 2021. Therefore, the 'current year' refers to 2020/21, while the 'previous year' refers to 2019/20.

As noted in the Introduction and Methodology sections, the report only covers services or products where base sizes were sufficiently comprehensive (section 1.3). Further detail about how to interpret the data can be found in section 2.3.

4.1. International Trade Advisors (ITAs)

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

This chapter explores the impact of using the ITA service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 661 businesses that used ITAs between April 2020 and March 2021 and participated in both the Quality Survey (QS) and RIS.

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

Actions taken as a result of using ITAs

Following their use of the ITA service, three in five businesses had researched the paperwork and regulations needed to export (61%) and identified new export opportunities or made new contacts (57%). Among non-exporters, three in five (58%) businesses had assessed their readiness to export after using ITAs.

Compared to the previous year, businesses were more likely to have researched the paperwork and regulations needed to export (61%, up from 52% in 2019/20), started or increased exporting (37%, up from 30%), looked for any other export services (35%, up from 23%) and made investments to support exporting (34%, up from 27%).

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was higher compared to the previous year (90% compared to 86% in 2019/20), and higher compared to the QS 2020/21 (90% compared to 84%).

Over half (56%) of businesses classified as 'Promote' (i.e. never exported before) in the QS 2020/21 had shifted to 'Sustain' in the RIS 2020/21. This was higher than in the previous year (56% compared to 40% in 2019/20).

Impact on winning contracts

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

Overall, 65% of businesses won a new overseas contract, including 34% saying this was with ITA or DIT assistance. Among businesses that reported DIT support was important in helping them win these contracts, seven per cent said they would not have been able to do this without DIT, and ten per cent said it would have been unlikely to be able to do this without DIT. These findings were in line with the previous year.

Impact on exposure and growth

Seven in ten (70%) businesses said ITAs assisted with expansion into a new market and three-quarters (74%) said ITAs assisted with expansion within an existing market. One in five (20%) reported being exposed to or starting to do business in at least one new market. These findings were in line with the previous year.

Compared to the previous year, Asia replaced Europe as the most common market for increased exposure or business. Businesses were more likely to report increased exposure in Asia (53% compared to 38% in 2019/20). Businesses were also less likely to report increased exposure in Europe (31% compared to 48% in 2019/20), with 28% reporting that their increased exposure or new business was within the European Union (down from 42% in 2019/20).

Impact on contacts and networks

Almost half of businesses (45%) made at least one new overseas contact after using ITAs (two contacts on average), although 53% reported DIT support did not make any difference to making exporting contacts. The average number of contacts made was down from 3 in 2019/20.

Impact on confidence

A third (35%) reported that using the ITA service boosted their confidence to export in a new market, while 28% said this for increasing exports in an existing market.

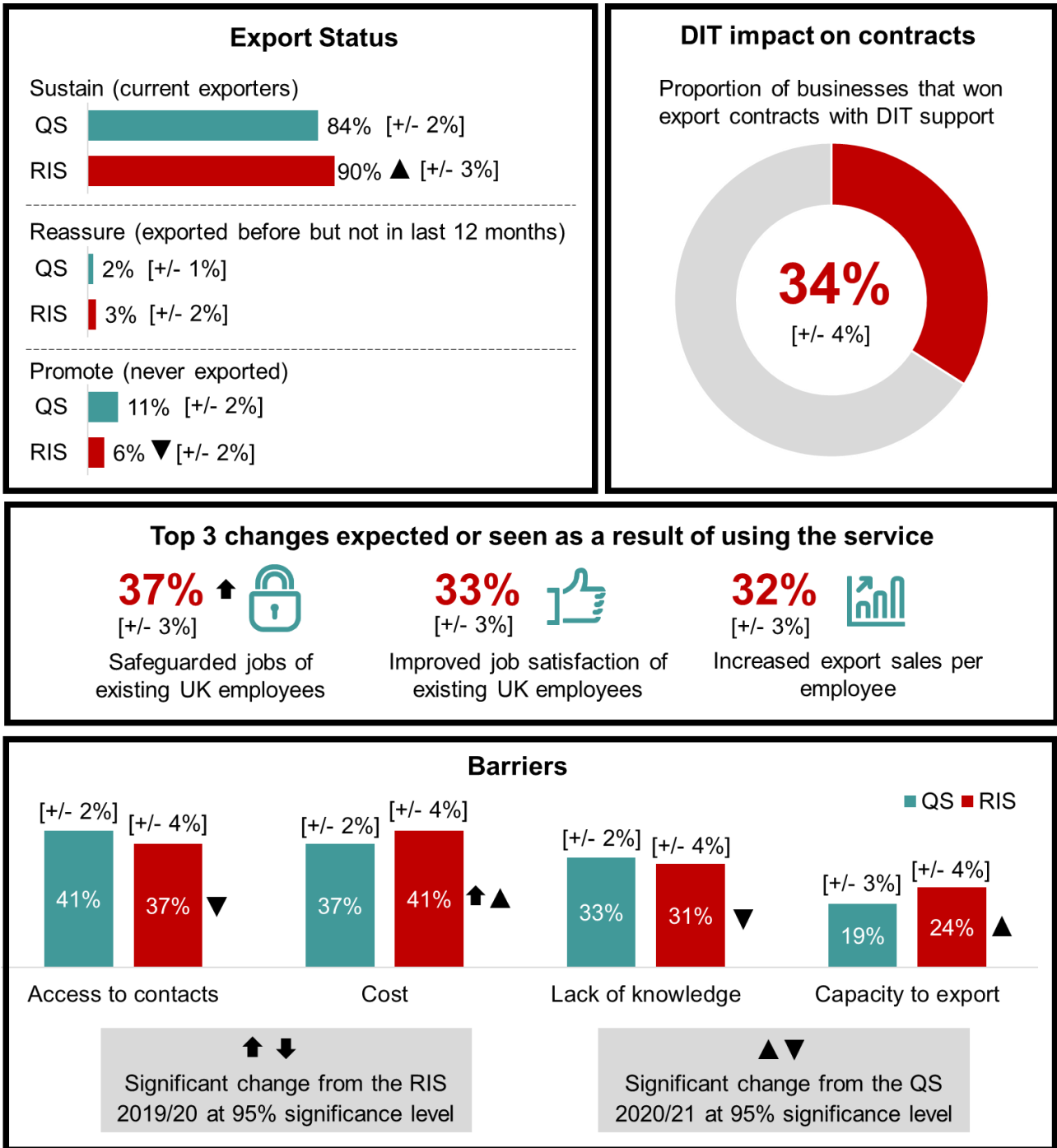
Compared to the previous year, fewer businesses reported that using the ITA service boosted their confidence in to export in a new market (42% in 2019/20).

Other impact

Six in ten (63%) ITA respondents reported that the ITA service helped them to gain access to information that they would otherwise have been unable to come by.

However, businesses felt less positive that using the ITA service had helped them to increase their knowledge of available export opportunities (29% compared to 35% in 2019/20).

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



Base: All businesses that used ITAs and completed both surveys (n=661); Barriers (QS n=661) – Access to contacts (RIS n=657), Cost (RIS n=653), Lack of knowledge (RIS n=657), Capacity to export (RIS n=649).

4.1.2. Satisfaction with ITAs (from Quality Survey)

In the QS 2020/21, six in ten businesses (59%) that used ITAs said they would recommend the service, while one in five (18%) said they would not. This gave ITAs a Net Promoter Score (NPS) of +41. Eight in ten (80%) reported they were satisfied with the ITA service, and three-quarters (73%) said the overall service met their needs.

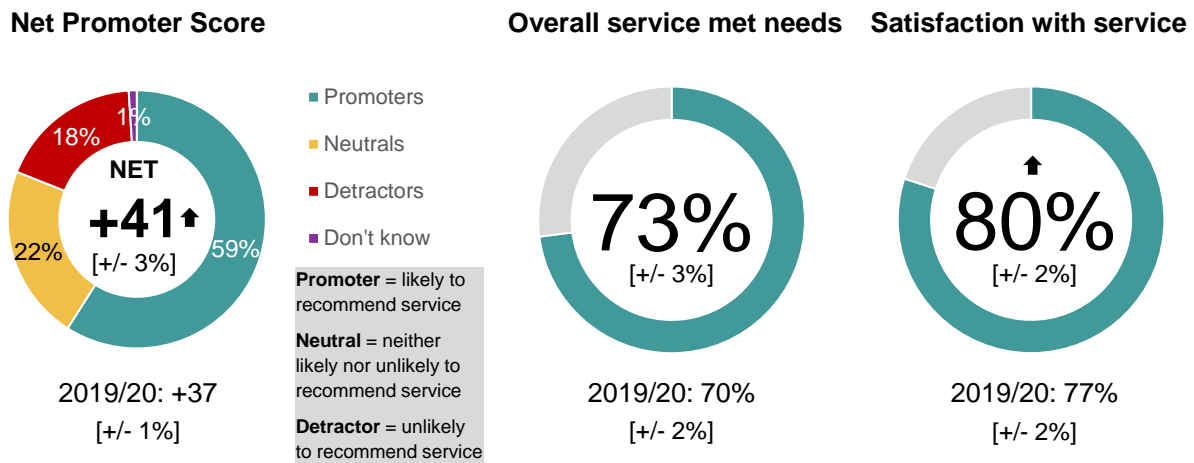
Compared to the previous year, the NPS increased (+41, up from +37 in 2019/20) and satisfaction also rose (80%, up from 77%).

ITA respondents were particularly positive about the comprehensiveness of information (80%) and the quality of contacts they had received through the service (74%). Both of these represent increases compared to the previous year (80% compared to 75% in 2019/20, and 74% compared to 70%, respectively).

As a result of using ITAs, six in ten businesses (59%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all ITA respondents, 56% said they had researched the paperwork and regulations needed to export. More businesses said they had done this than in the previous year (56% compared to 50% in 2019/20).

ITA respondents were most likely to report that 'cost' was a barrier to exporting (39%). This was higher compared to the previous year (32% in 2019/20).

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



From the Quality Survey 2020-21:
 Qlikrec: Based on your experiences of ITAs, how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before? Base: All businesses that used ITAs (n=1,526).
 Qqualinfo – Using that same scale, how would you rate ... the extent to which the overall service received met your needs? Base: All businesses that used ITAs (excluding 'not applicable' responses) (n=1,488).
 Qsatis – Using the same scale as before, thinking about your overall experience of ITAs, how satisfied were you with this service? Base: All businesses that used ITAs (excluding 'not applicable' responses) (n=1,509).

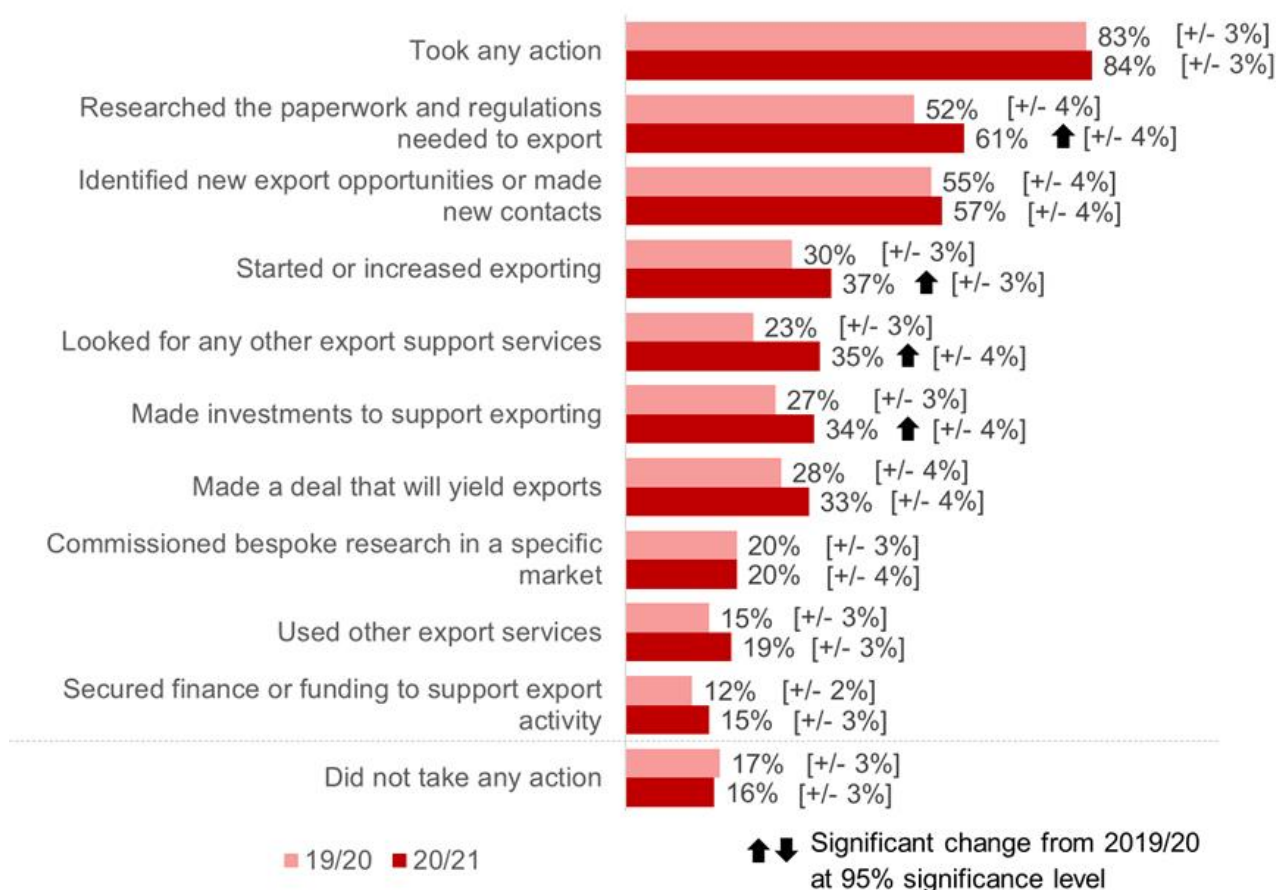
4.1.3. Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the ITA service (Chart 4.1.3). Around three in five reported they had researched the paperwork and regulations needed to export (61%) and identified new export opportunities or made new contacts (57%). Three in five businesses (58%) that were not exporting had assessed the business' readiness to export.

Using other export services was more common among businesses with a high turnover of over £500,000 (23%) than among those with lower turnovers (14%).

Compared to the previous year, more businesses had taken certain actions in 2020/21. Businesses were more likely to have researched the paperwork and regulations needed to export (61%, up from 52% in 2019/20), started or increased exporting (37%, up from 30%), looked for any other export services (35%, up from 23%) and made investments to support exporting (34%, up from 27%).

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



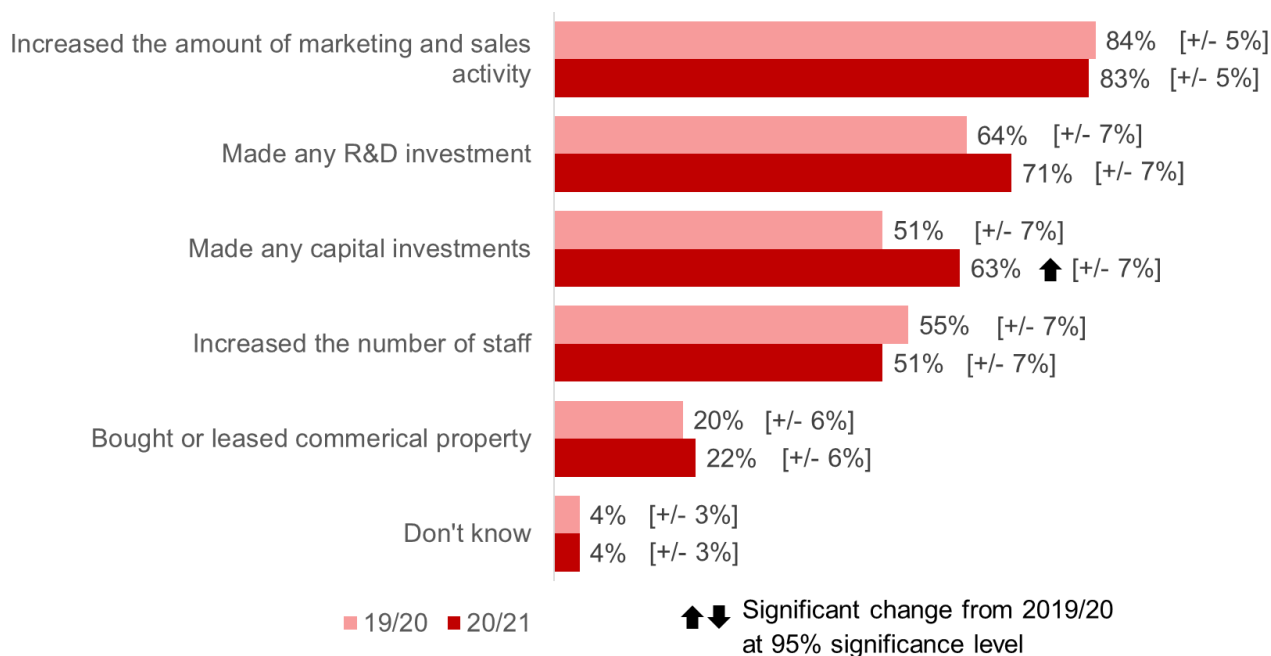
QResultService: What has your business done as a result of ITAs? Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20)). 'Took any action' includes non-exporters who responded 'Assessed company's readiness to export'.

Businesses that had made an investment as a result of using the ITA service were asked what investments they had made (230 respondents). The most common answer was an increase in marketing and sales activity (83%), followed by R&D investment (71%) and capital investments (63%).

Businesses with a high turnover of £500,000 or more were more likely to have increased the number of staff (62%) compared with those with lower turnover (32%).

The only change from the 2019/20 RIS in type of investment was that the proportion of businesses who made any capital investments grew from 51% to 63%.

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



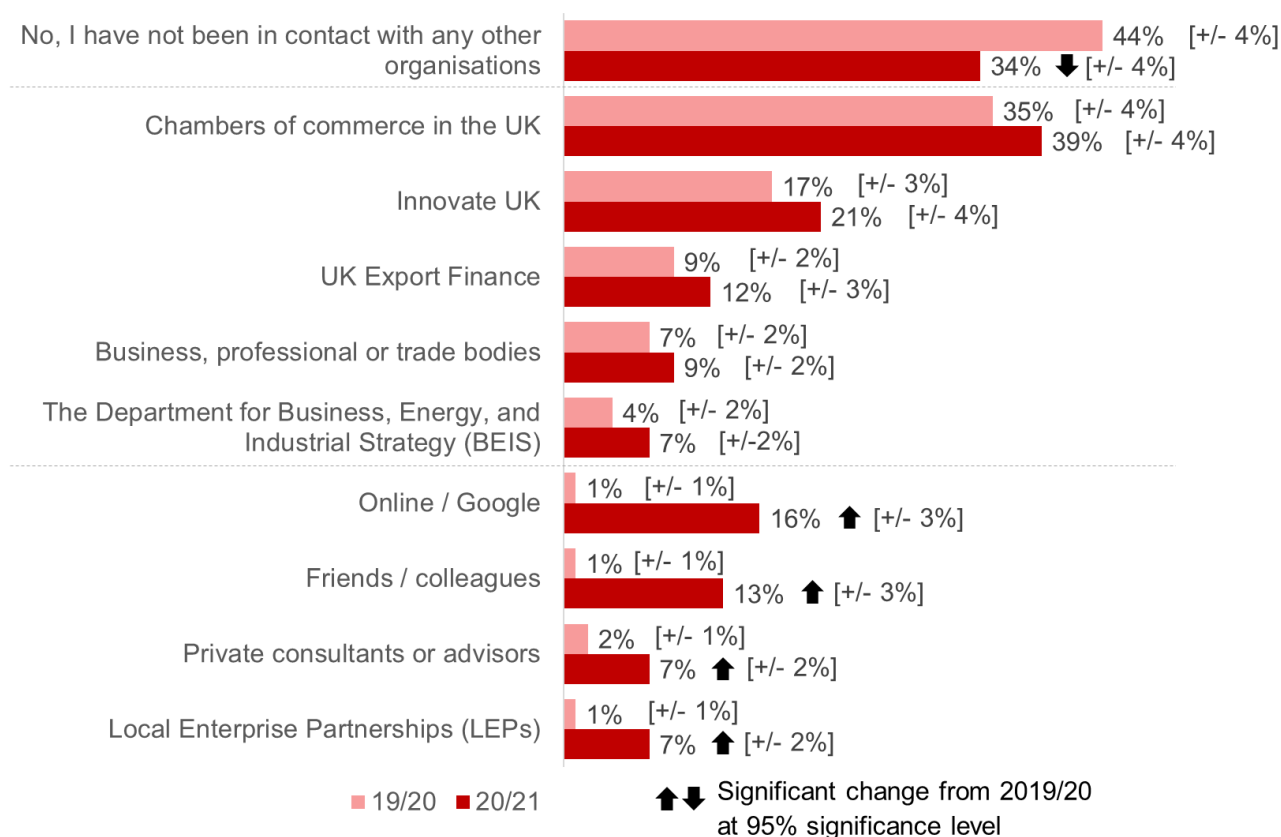
*QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities?
Base: All businesses that used ITAs and made investments to support exporting as a result of using ITAs (n=230 (2020/21), n=236 (2019/20))*

Businesses were asked what organisations they had been in contact with since using ITAs. Four in ten (39%) had been in contact with the British Chambers of Commerce and around one in five (21%) had been in contact with Innovate UK. Around a third (34%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Businesses from the West Midlands were more likely to have been in contact with the British Chambers of Commerce compared to overall (60% and 40% respectively). Businesses with a turnover of over £500,000 were significantly more likely to have contacted friends and colleagues than businesses with a turnover of less than £500,000 (18% and 9% respectively).

In comparison to the 2019/20 RIS, businesses were more likely to have been online or on Google (16%, up from 1% in 2019/20), or in contact with friends/colleagues (13%, up from 1%), private consultant advisors (7%, up from 2%) or Local Enterprise Partnerships (7%, up from 1%).

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



QAnyContact: And again, since your business used [SAMPLED SERVICE] in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities? Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20)). Coded responses with 5% or more are included.

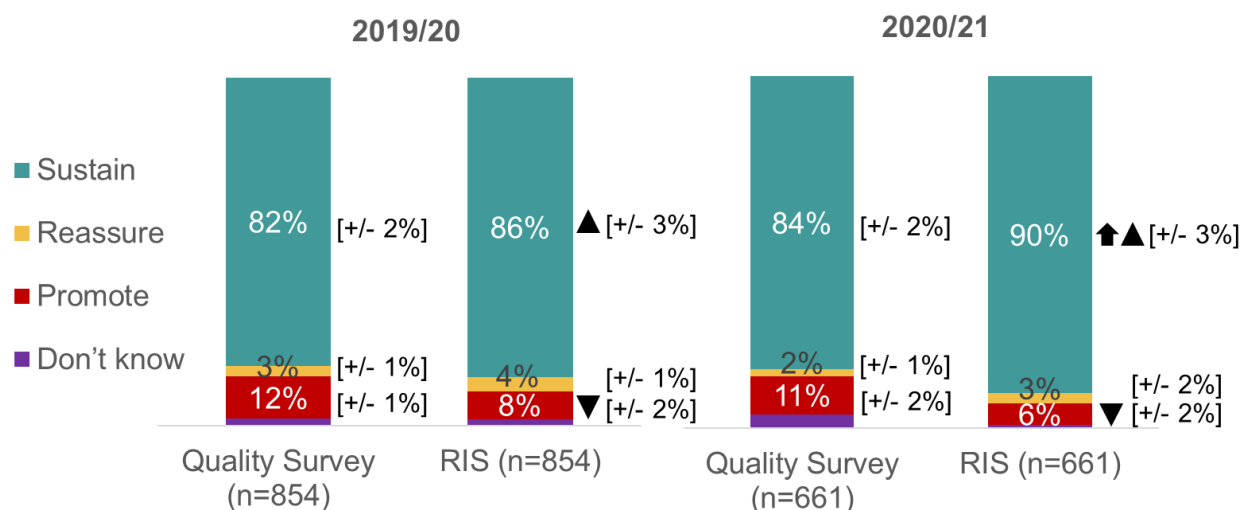
4.1.4. Reported impact on exporting

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

- Sustain:** refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around nine in ten businesses (84%) that used ITAs fell into this segment at the time of the service delivery (QS 2020/21). This increased to 90% in the RIS 12 months later.
- Reassure:** refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Two per cent that used ITAs fell into this segment at the time of the service delivery (QS 2020/21), and this was unchanged 12 months later (three per cent).
- Promote:** refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. One in ten (11%) that used ITAs were in this segment at the time of the service delivery (QS 2020/21). This decreased 12 months later to six per cent.

The proportion of businesses classified as ‘Sustain’ was higher compared to the previous year (90% compared to 86% in 2019/20).

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



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

▲▲ Significant change from the RIS 2019/20 at 95% significance level
 ▲▼ Significant change from the QS 2020/21 at 95% significance level

Source: Composite measure merging data from several variables. Base: All businesses that used ITAs and completed both surveys (Quality Survey: n=661 (2020/21), 854 (2019/20). RIS: n=661 (2020/21), 854 (2019/20))

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

Six in ten (61%) businesses from the Reassure segment moved to Sustain, three per cent of businesses in the Sustain segment moved to Reassure, and one per cent moved from the Sustain segment to Promote. These findings were in line with the previous year (2019/20).

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

Quality Survey Export status	RIS Export status	Percentage	Change since 2019/20
Sustain (n=549)	Sustain	96% [+/- 2%]	-
	Reassure	3% [+/- 1%]	-
	Promote	1% [+/- 1%]	-
Promote (n=72*)	Sustain	56% [+/- 10%]	↑
	Reassure	0%	-
	Promote	42% [+/- 10%]	-

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

4.1.5. Reported export contracts achieved since receiving the service

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

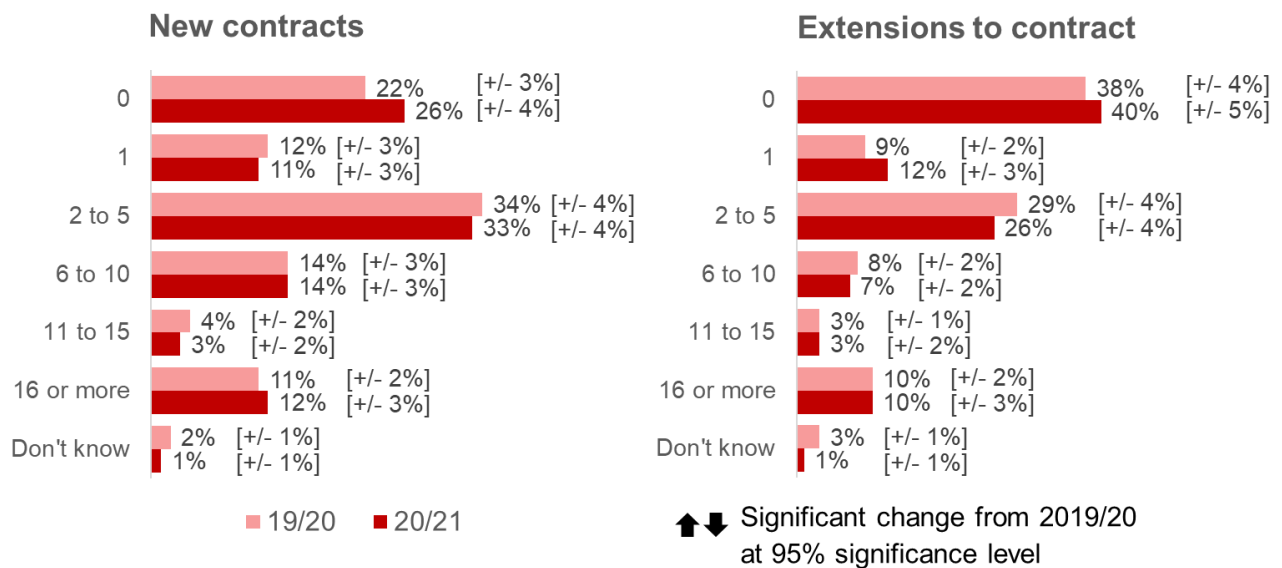
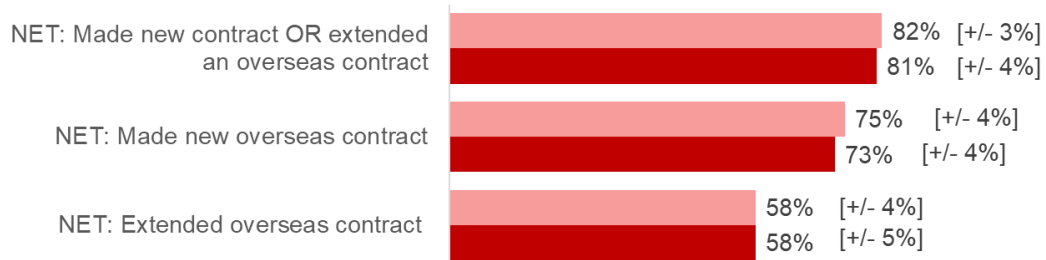
Of the 90% of businesses that had exported, 81% reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service. This is in line with the RIS 2019/20 (82%).

Around three-quarters (73%) of these exporting businesses had won new overseas business contracts in the year since they used the service (Chart 4.1.7). Specifically, 11% had won one overseas contract, and a third (33%) had won between two and five overseas contracts. Around one in eight (12%) businesses had won more than 16 overseas contracts (Chart 4.1.7). The median number of contracts won among exporting businesses that had used ITAs was two⁷.

Almost three in five (58%) exporting businesses that used ITAs reported they had gained extensions to existing overseas business contracts in the year since they used the service. Twelve per cent extended one contract, and a quarter (26%) extended between two and five contracts. One in ten (10%) extended more than 16 existing overseas sales contracts. Around four in ten (42%) businesses had not extended any existing contracts (Chart 4.1.7). The median number of contracts extended (including those that did not extend any) was one, in line with the previous year.

⁷ This is taken from the 90% that exported and could also provide a figure for the number of contracts won. It includes those that export but did not win any new contracts in the 12 months since they used the service.

Chart 4.1.7 Proportion of businesses that exported and reported they had made new overseas contracts and / or extended existing contracts, and number of contracts made in previous 12 months – ITAs⁸



Q_Newcontract: Firstly, how many new overseas business contracts for export sales did you win in the past year?

Q_Extendcontract: And how many extensions to existing overseas business contracts for export sales did you win in the past year?

Base: All businesses that used ITAs and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (n=590 (2020/21), n=742 (2019/20))

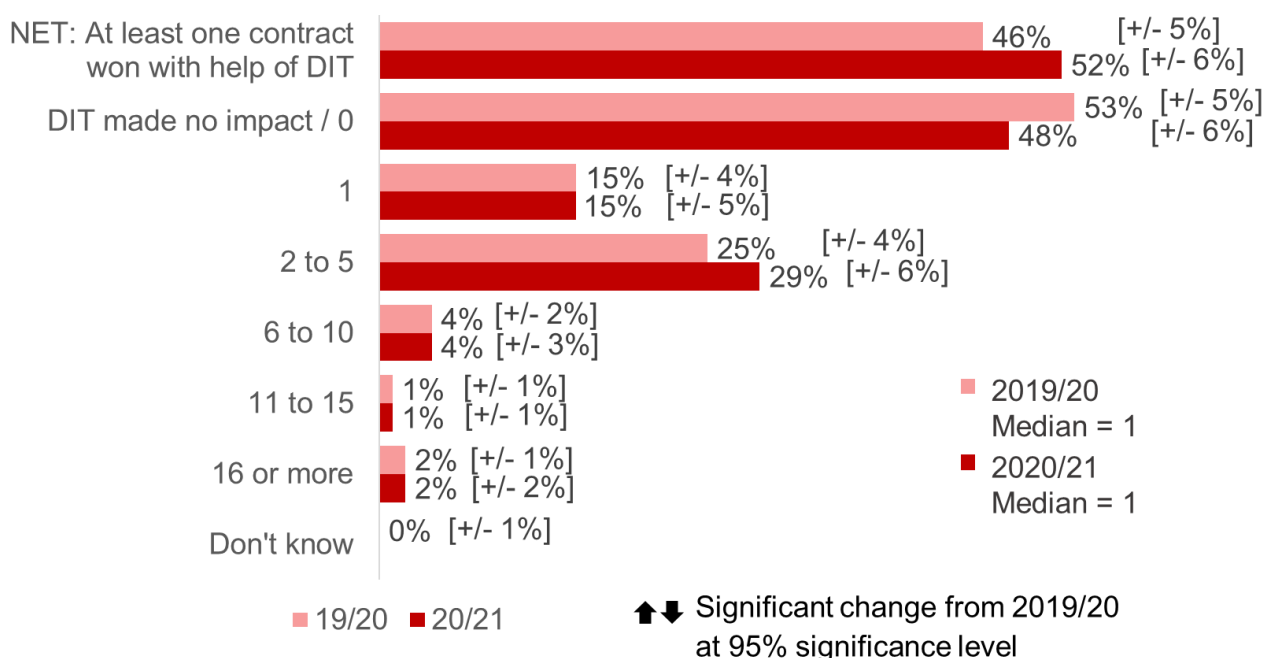
⁸ The total percentage of all responses for this question may not sum to 100 per cent due to rounding.

Reported additional contracts which were gained because of DIT support

Businesses that exported and that had won at least one new contract in the 12 months since the delivery of the ITA service were asked whether they could estimate the number of contracts won with the assistance of ITAs or DIT. In total, 346 businesses (that is 52% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.1.8 below, almost half of these businesses (48%) said they won no new overseas sales contracts with the help of DIT, or using DIT services made no impact. Fifteen per cent had won one new overseas contract, and three in ten (29%) had won between two and five contracts. The median number of contracts that DIT helped win was one⁹, for current exporters that used ITAs. This was in line with the previous year (2019/20 RIS).

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



Q_ContractDIT: Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT

Q_ContractNumber: How many new overseas contracts were won with help from DIT

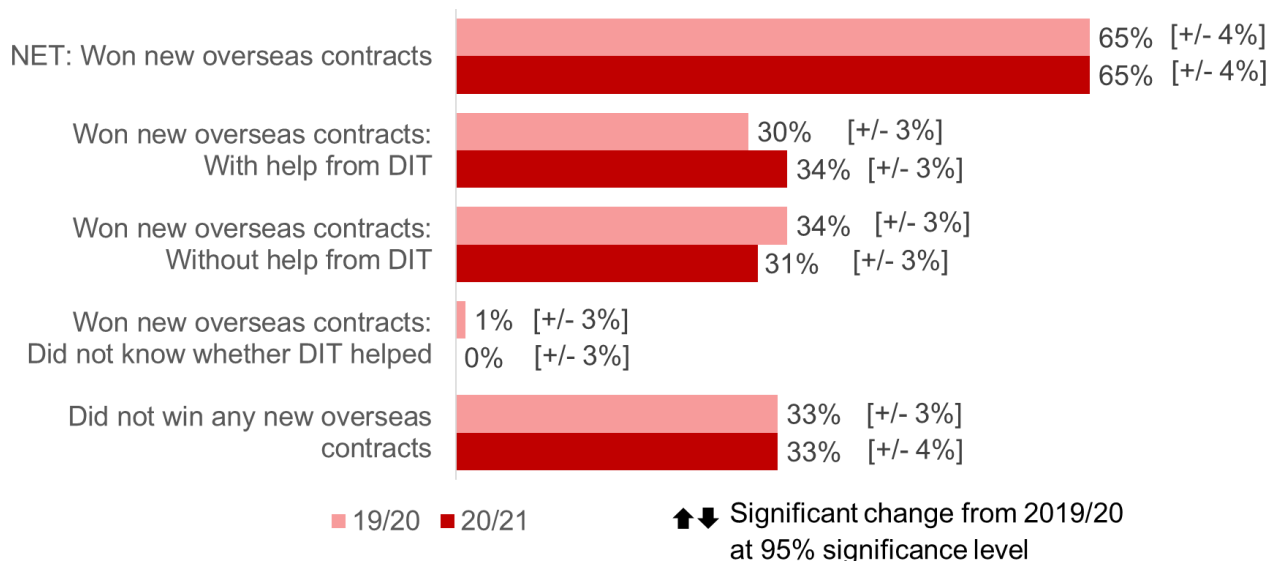
Base: All businesses that used ITAs and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=346 (2020/21), n=429 (2019/20)). Median values include zero.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DIT. Among all businesses that had used ITAs, 65% said they had won new overseas contracts (either with help from DIT, without help from DIT, or were unsure whether DIT helped). More specifically, we estimate that 34% of ITA respondents had won contracts with help from DIT, while 31% of ITA respondents said they had won contracts without help from DIT. This is in line with the previous year¹⁰.

⁹ This includes businesses that reported the ITA service did not help them to win any contracts.

¹⁰ Please refer to the annex and survey technical report for a more detailed explanation of this measure.

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



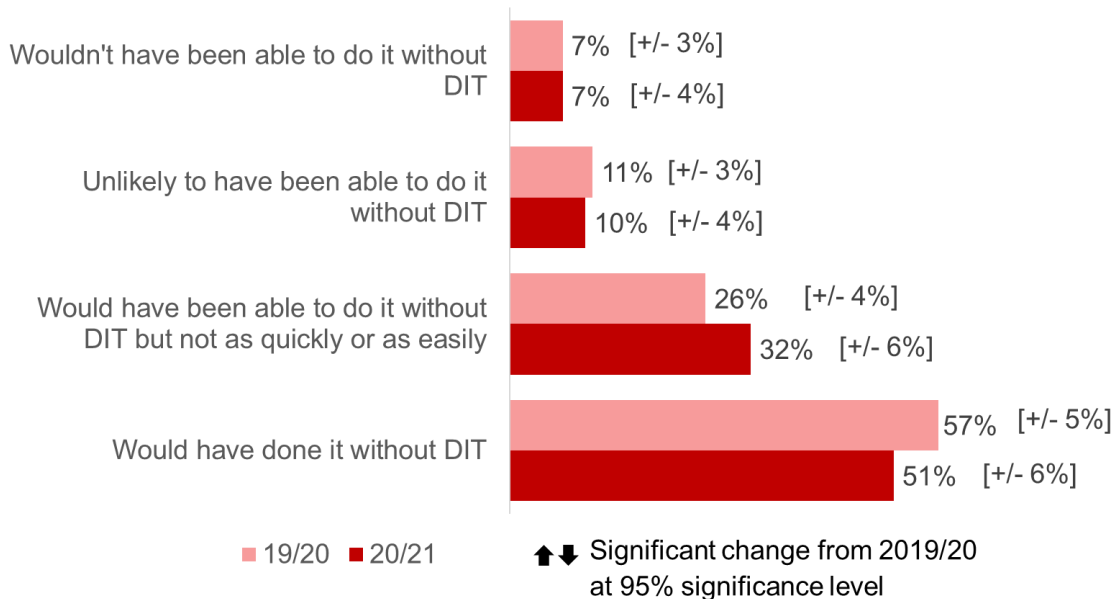
Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

Importance of DIT’s support in winning overseas contracts

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

Around half of these businesses (49%) reported that DIT support was important in helping them win these contracts to some extent. Seven per cent of those who won at least one new overseas contract said they would not have been able to do it without DIT, while ten per cent thought it was unlikely they could have done it without DIT. A third (32%) thought they would not have been able to do it as quickly or easily without DIT support (Chart 4.1.10). The remaining 51% thought they would have been able to achieve the same outcome without DIT support. These results are in line with the previous year.

Chart 4.1.10 How important DIT’s help was in winning overseas contracts – ITAs



QContractHelp: How important was DIT’s help in winning these overseas contracts
 Base: All businesses that used ITAs and won any new overseas contracts in the past year (n=346 (2020/21), n=429 (2019/20))

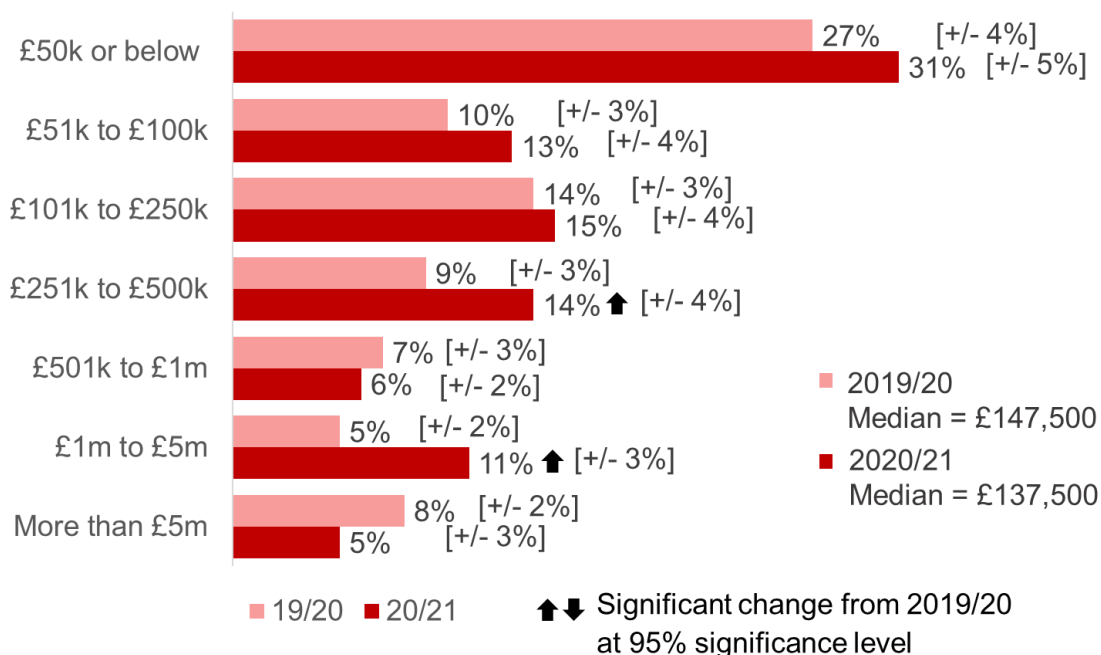
4.1.6. Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 65% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts, in total (Chart 4.1.11). The median value of the export sales of all new overseas contracts for these businesses was £137,500 (compared to £147,500 in RIS 2019/20). Around one in three (31%) had won contracts with an export sales value of £50,000 or below. Almost one in six (16%) said that the export sales value of the new overseas contracts won was more than £1 million.

Compared to RIS 2019/20, a larger proportion of businesses reported winning new contracts of £251,000 to £500,000 (14%, up from 9% in 2019/20) and £1 million to £5 million (11%, up from 5% in 2019/20).

Chart 4.1.11 Value of all new overseas contracts made in previous 12 months – ITAs



QContractValue: What is the value of all these new overseas business contracts for export sales?
 Base: All businesses that used ITAs and won any new overseas business contracts (n=425 (2020/21), n=559 (2019/20))

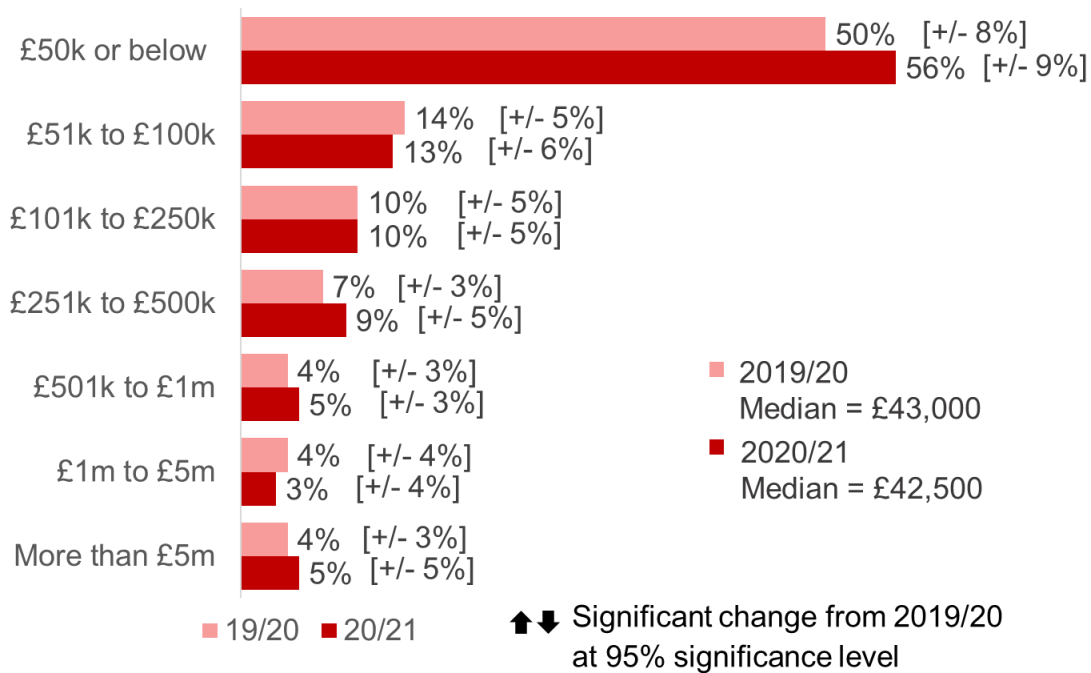
Reported additional value of DIT support

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

Businesses were asked to estimate the value of new overseas business contracts that they had won with DIT support. This data was used to estimate the ‘reported additional export sales’ – that is, the reported additional impact of using DIT services on export sales. The reported additional export sales for ITAs were £42,500, across all the contracts that ITAs helped businesses to win (compared to £43,000 in RIS 2019/20). Note that this does not include businesses that did not win any new export contracts, or businesses that said DIT made no impact on overseas contract wins.

Over half (56%) reported additional export sales of £50,000 or below, and 13% reported additional new export sales of between £51,000 and £100,000. A small proportion of businesses had exceptionally large value added by DIT support; eight per cent won overseas sales contracts with the help of DIT support, worth more than £1million (Chart 4.1.12). These results are in line with the previous year.

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

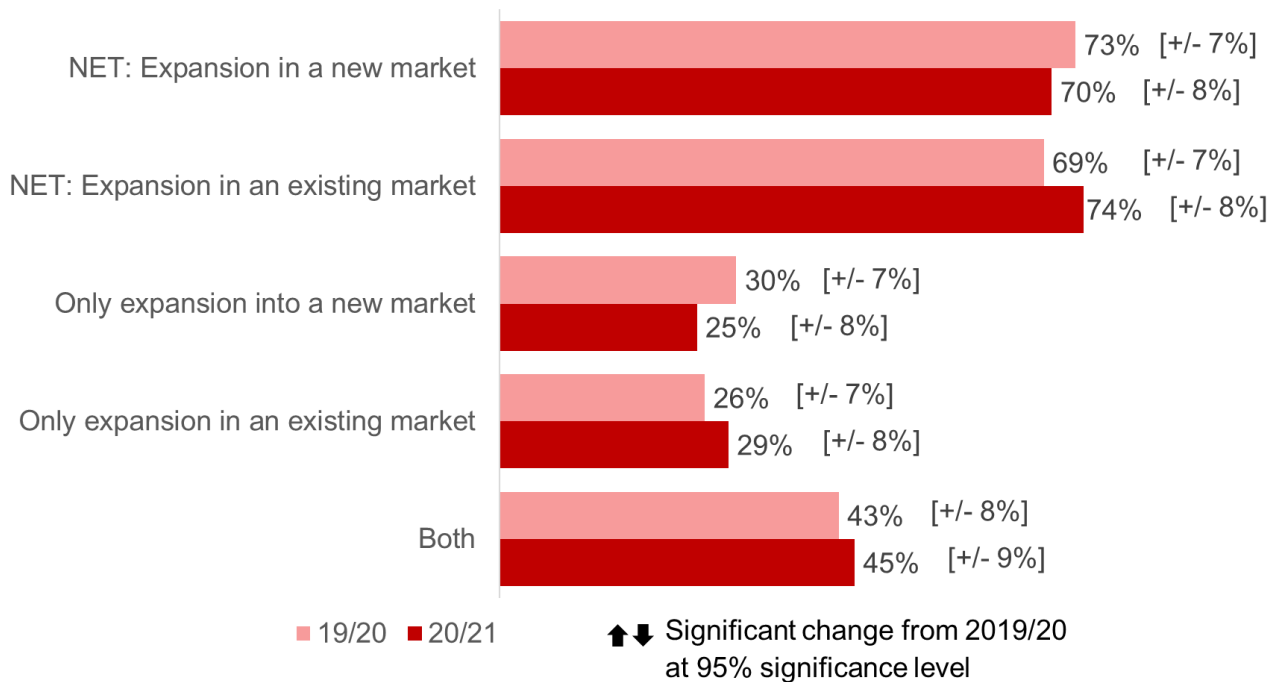


QContractValueDIT: What was the value of these new overseas business contracts that your business won with the help of ITA/DIT support last year?
 Base: All businesses that used ITAs and won any new overseas business contracts with the help of DIT (n=168 (2020/21), n=199 (2019/20))

4.1.7. Recorded exposure and growth within new markets

Businesses were asked whether new contracts they had won represented expansion into a new market, expansion within an existing market, or both. This question was asked to businesses that said DIT support helped them to win new overseas contracts and were able to provide details of the number and value of these contracts. Seven in ten (70%) businesses said they were assisted with expansion into a new market and three-quarters (74%) said they were assisted with expansion within an existing market. This includes 25% who said that DIT helped them expand into new markets (but not existing markets), and 29% expanded within an existing market (but not into new markets). Just under half (45%) reported that DIT helped them expand into both existing and new markets. These results are in line with the previous year.

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



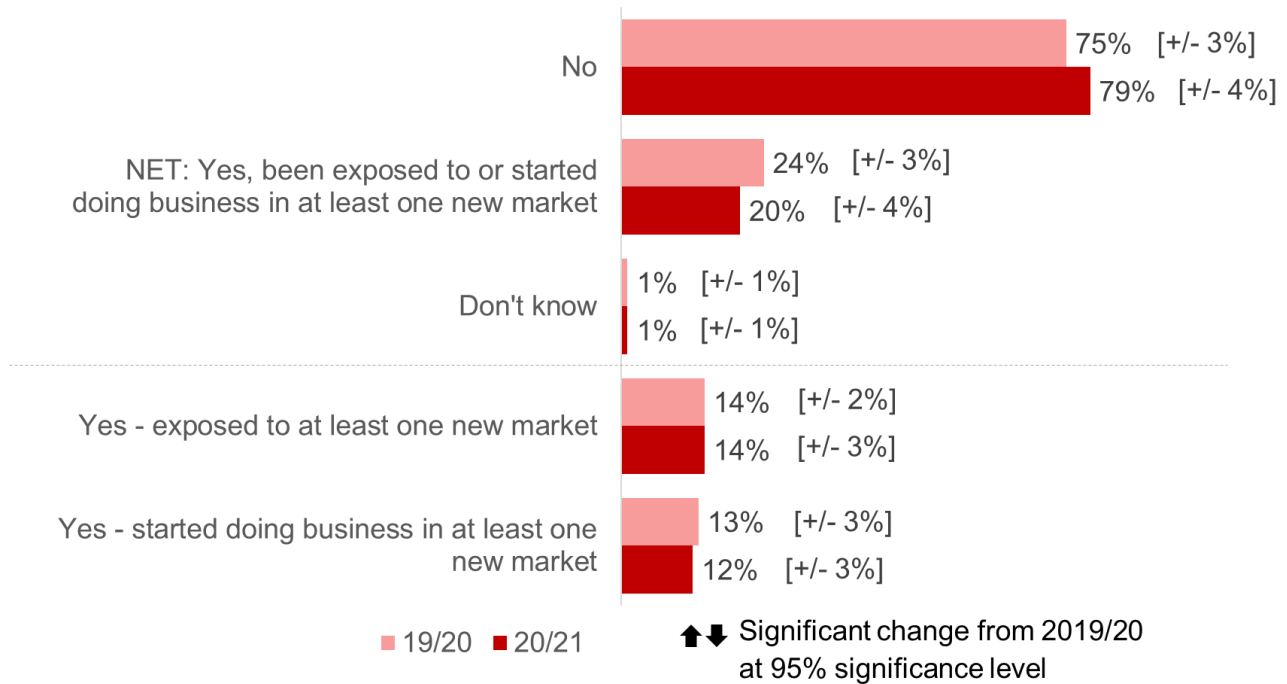
QContractRepresent: And did these new overseas contracts represent...?

Base: All businesses that used ITAs and won any new overseas business contracts with the help of DIT (n=168 (2020/21), n=199 (2019/20))

All businesses that used ITAs were asked whether they had increased their exposure or started doing business in any new markets because of using the ITA service¹¹. Similar proportions of businesses said they had been exposed to at least one new market (14%) and had started doing business in at least one new market (12%) as a result of using the ITA service. These results are in line with the previous year.

¹¹ Respondents could select both if they had been exposed to at least one new market and if they had started doing business in at least one new market.

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

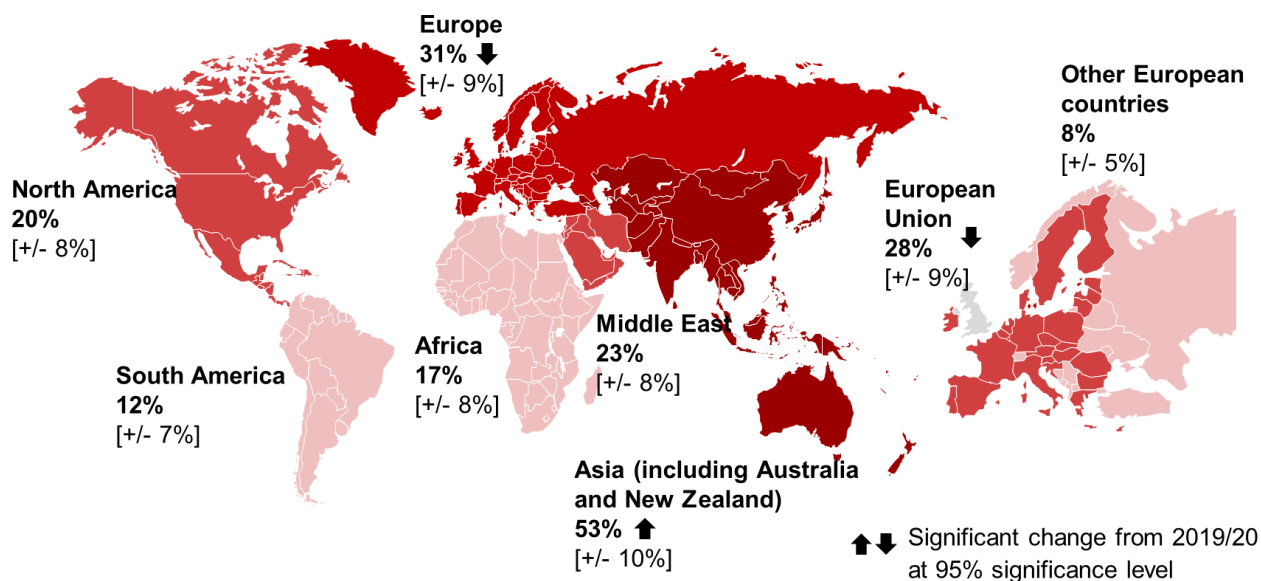


QGrowthDIT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
 Base; All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

The most common market for increased exposure or business was Asia (including Australia and New Zealand) (53%), followed by Europe (31%), the Middle East (23%) and North America (20%). Looking in more detail at Europe, 28% reported that their increased exposure or new business was within the European Union, while eight per cent had new or increased exposure in other European countries.

Compared to the 2019/20 RIS, Asia replaced Europe as the most common market for increased exposure or business. Businesses were more likely to report increased exposure in Asia (53% compared to 38% in 2019/20) as well as less likely to report increased exposure in Europe (31% compared to 48% in 2019/20).

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



QNewRegion – And which of the following new markets has your business started doing business in or been exposed to?
 Base: All businesses that used ITAs and have had increased exposure to, or started doing business in at least one new market (n=123 (2020/21), n=211 (2019/20))

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

Region	2019/20	CI (+/-)	2020/21	CI (+/-)	Change ¹²
Europe	48%	7%	31%	8%	↓
European Union	42%	7%	28%	8%	↓
Other European countries	16%	5%	8%	7%	-
Asia (including Australia and New Zealand)	38%	7%	53%	8%	↑
Middle East	29%	7%	23%	7%	-
North America	29%	7%	20%	7%	-
Africa	17%	6%	17%	7%	-
South America	13%	6%	12%	7%	-
<i>Base</i>	<i>211</i>		<i>123</i>		

¹² Charts and tables represent a statistically significant increase from 2019/20 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

4.1.8. Barriers to exporting

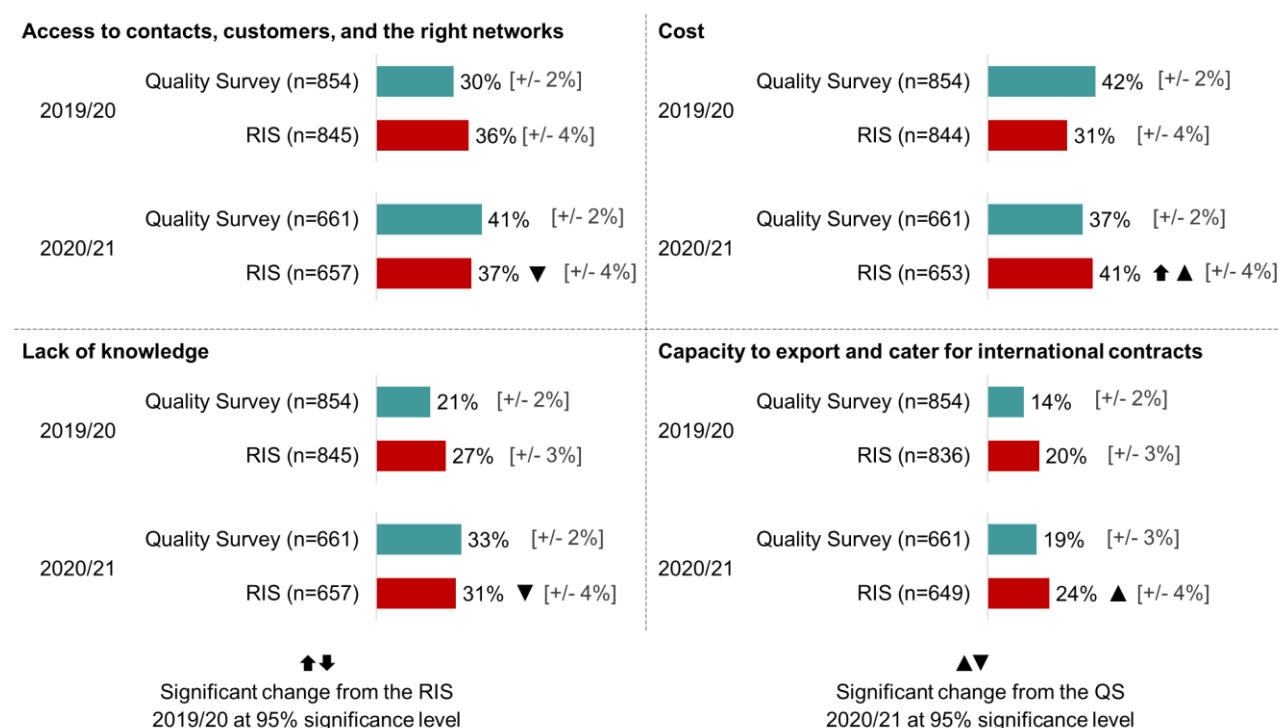
Businesses were asked in both the Quality Survey and Reported Impact Survey about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)¹³.

The top barrier in RIS 2020/21 was ‘cost’ (41%), followed by ‘access to contacts’ (37%).

Compared to these businesses’ responses in the Quality Survey 2020/21, businesses were less likely to report ‘access to contacts’ (37%, down from 41% in QS 2020/21) and ‘lack of knowledge’ (31%, down from 33% in QS 2020/21) as barriers. In contrast, businesses were more likely to report ‘cost’ (41%, up from 37% in QS 2020/21) and ‘capacity to export’ (24%, up from 19% in QS 2020/21) as barriers.

Compared to the previous year, more businesses reported that ‘cost’ (41% compared to 31% in 2019/20) was a barrier to exporting.

Chart 4.1.16 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – ITAs¹⁴



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

¹³ This section compares results for businesses who completed both surveys and provided a response to this question in both surveys. Businesses that said a barrier was not applicable in either survey were excluded.

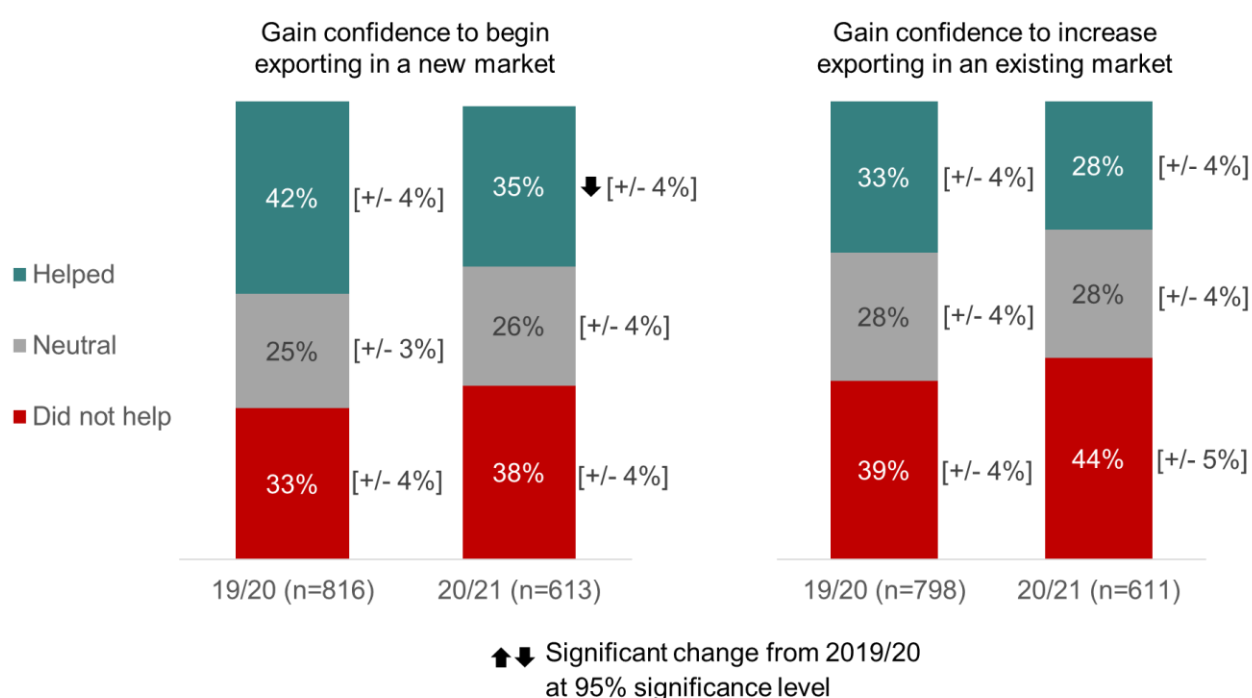
¹⁴ The percentages shown in this chart are for businesses that rated a factor as 7-10 out of 10 when asked how much of a barrier it is.

4.1.9. Wider benefits of the service

Businesses were asked to think about the extent to which using the ITA service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market. More businesses reported that using the ITA service had not given them confidence to begin exporting in a new market (38%) or to increase exporting in an existing market (44%), than did. A third (35%) reported that using the ITA service had given them confidence to begin exporting in a new market and 28% reported that it given them confidence to increase exporting in an existing market.

Compared to the previous year, fewer businesses reported that using the ITA service boosted their confidence in exporting in a new market (35% compared to 42% in 2019/20).

Chart 4.1.17 To what extent using the ITA service helped to build confidence to export – ITAs



QGainConfidence: On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of ITAs help you to...? Helped (7-10), Neutral (4-6), Did not help (0-3). Base: All businesses that used ITAs not including those who gave a 'not applicable' answer.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**¹⁵. Chart 4.1.18 below shows how businesses rated the impact of using the ITA service on their knowledge.

On balance, more businesses reported that using the ITA service was **helpful for increasing their knowledge of support available to them (from DIT and elsewhere)**. Over four in ten (44%) said the service helped to do this, and three in ten (30%) said it did not help them do this. These findings were in line with the previous year (2019/20).

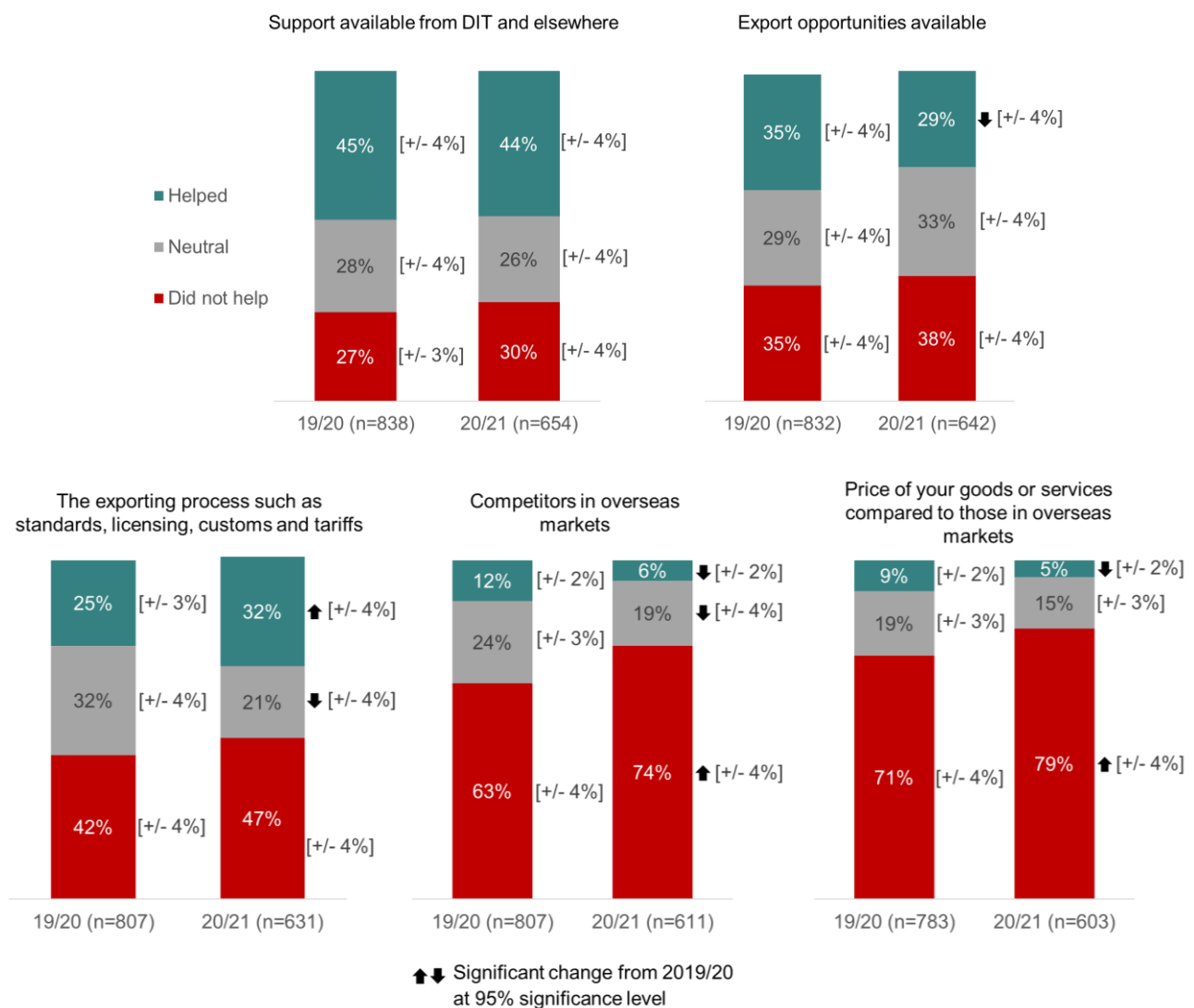
However, more businesses on balance reported that using the ITA service was **not helpful for increasing their knowledge of export opportunities available or improving their knowledge of the exporting process**. Three in ten businesses that had used ITAs (29%) said that the service

¹⁵ Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

had helped them to increase their knowledge of the export opportunities available (down from 35% in 2019/20). Four in ten (38%) said they were not helped in this way. Half (47%) of businesses said that the service did **not help to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs; a third (32%) of businesses that had used ITAs said the service did help them in this way. However, this third represents a significant increase from the previous year, when a quarter (25%) felt that the service helped them in this way.

Only small proportions said that using ITAs improved their **knowledge of the price of goods** compared with those in overseas markets (5%) or about their **competitors in overseas markets** (6%). In comparison to the 2019/20 RIS, these were both declines (9% and 12% respectively).

Chart 4.1.18 To what extent the business felt that their knowledge has improved as a result of using the service – ITAs



QImproveKnowledge – Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of [Sampled Service]? Helped (7-10), Neutral (4-6), Did not help (0-3). Base: All businesses that used ITAs not including those who gave a 'not applicable' answer.

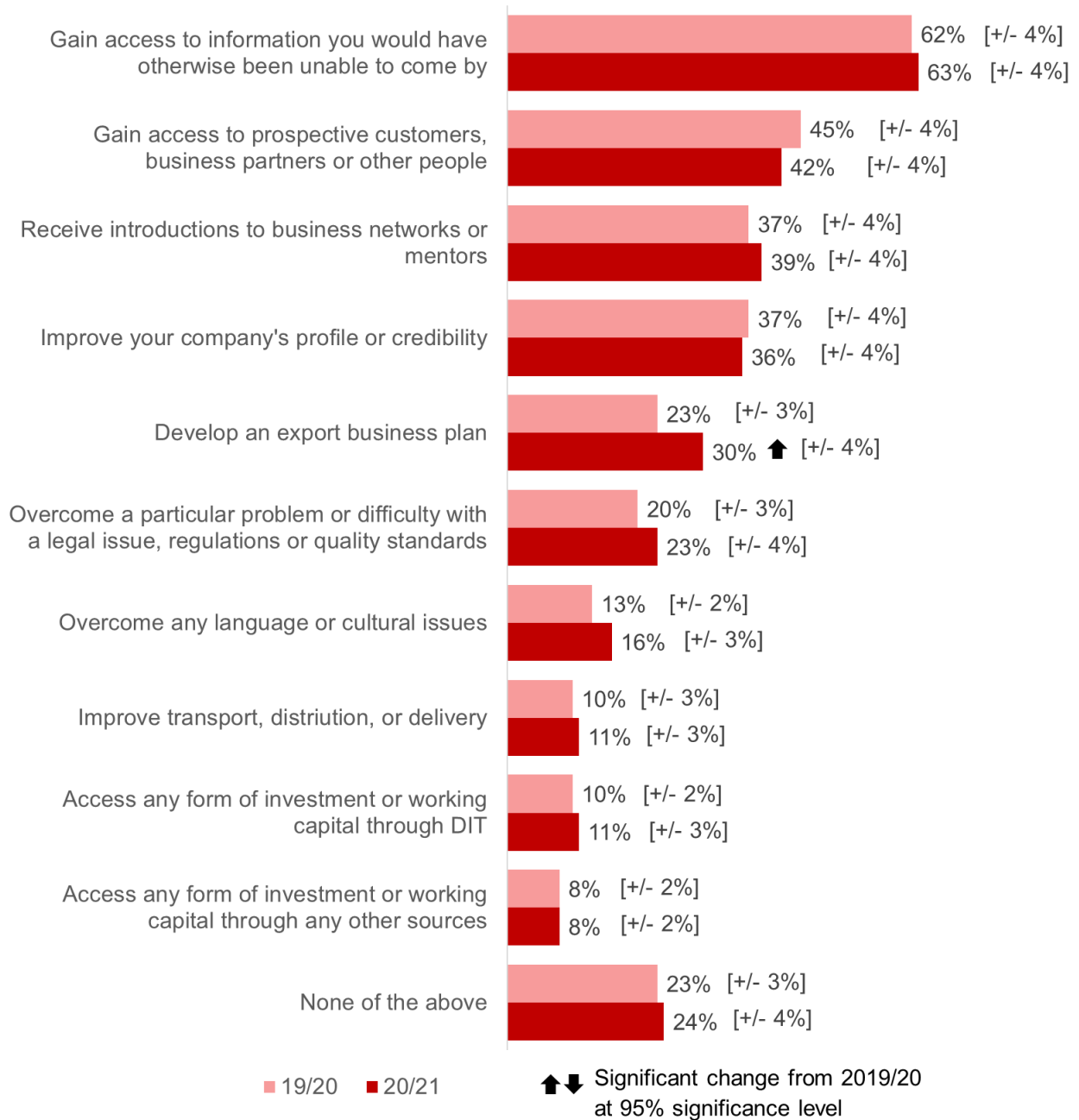
Businesses were asked about other ways they had benefitted from using ITAs in the year between dealing with the ITA and taking part in the RIS.¹⁶ A detailed breakdown of responses is shown in Chart 4.1.19.

The top responses were: helping businesses to gain access to information that they would otherwise have been unable to come by (63%), or gaining access to prospective customers, business partners or other people that they otherwise would have been unable to meet (42%). A quarter (25%) felt that using the ITA service had not helped them in any of the ways listed.

Compared to the 2019/20 RIS, there was an increase in the proportion of business that developed an export business plan, from 23% to 30%. There were no other significant changes compared to the 2019/20 RIS.

¹⁶ Respondents were asked to select from a pre-coded list and had the option to provide an 'other' answer

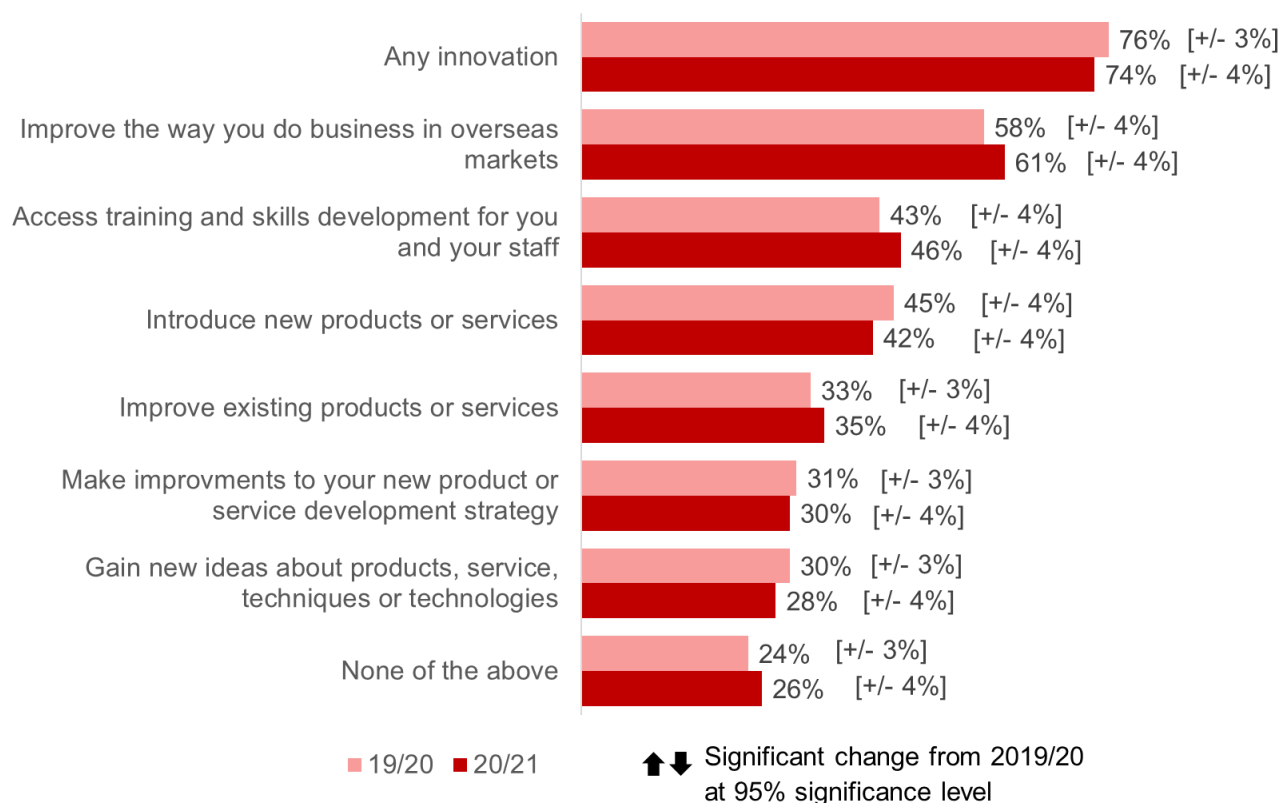
Chart 4.1.19 In what ways has the business felt it had benefited from DIT support – ITAs



QServiceBenefit: in which of the following ways if any, has your business benefited specifically from ITAs over the last year? Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

Businesses were asked whether using the ITA service had helped, or was likely to help, support innovation and/or development in their business. Three quarters (74%) said that using the service helped them with innovation or development in some form. The most frequent responses were: to improve the way they do business overseas (61%), to access training and skills for themselves or their staff (46%), and to introduce new products or services (42%). These findings were in line with the 2019/20 RIS.

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



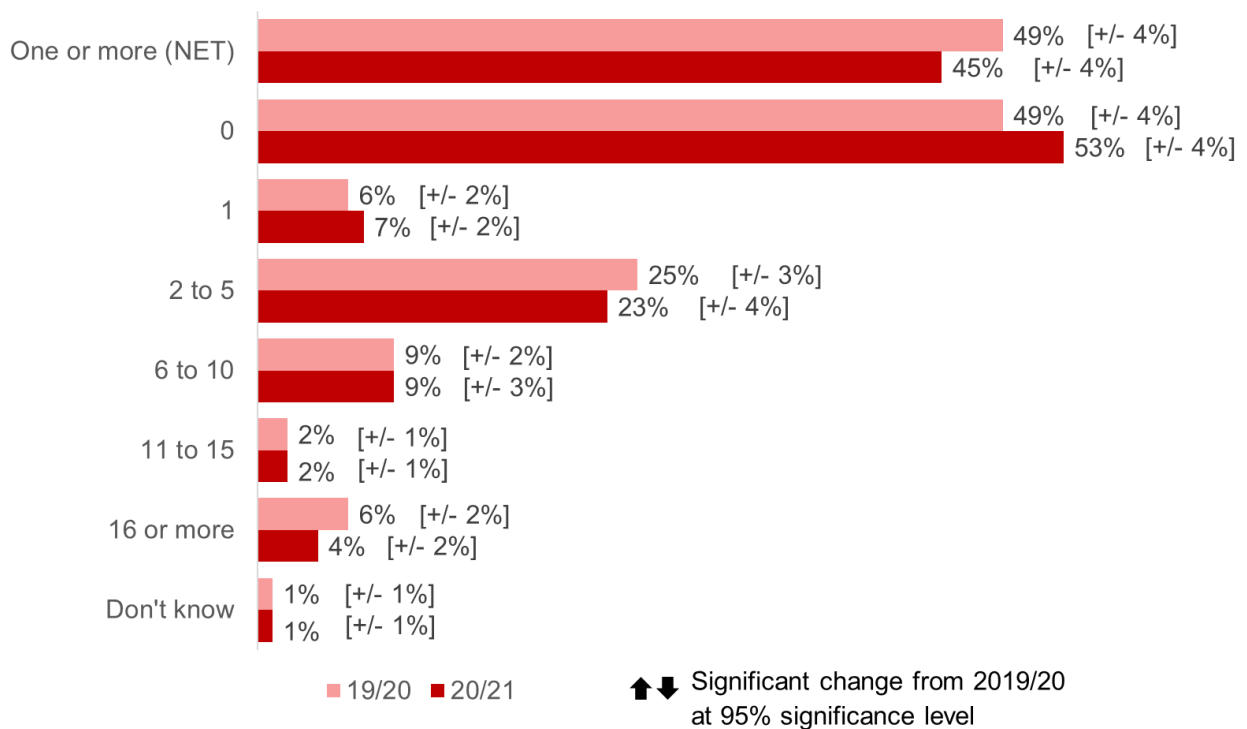
QInnovationSupport: Still thinking of ITAs, has this service helped or do you expect it to help your business with development and/or innovation? Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

International contacts

Businesses were asked how many overseas contacts they had made as a result of using ITAs over the past year (Chart 4.1.21). Almost half (45%) of businesses made at least one new overseas contact in the year since using the ITA service, with a quarter (23%) making between two and five new contacts. Over half (53%) of businesses reported that they had not made any new contacts as a result of using the ITA service. These findings were in line with the 2019/20 RIS.

The average number of contacts made was two, which was a decrease from the 2019/20 RIS average of 3.

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



Q_ContactsMade: How many new overseas contracts, if any, did your business make as a result of [SAMPLED SERVICE] in the past year? Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

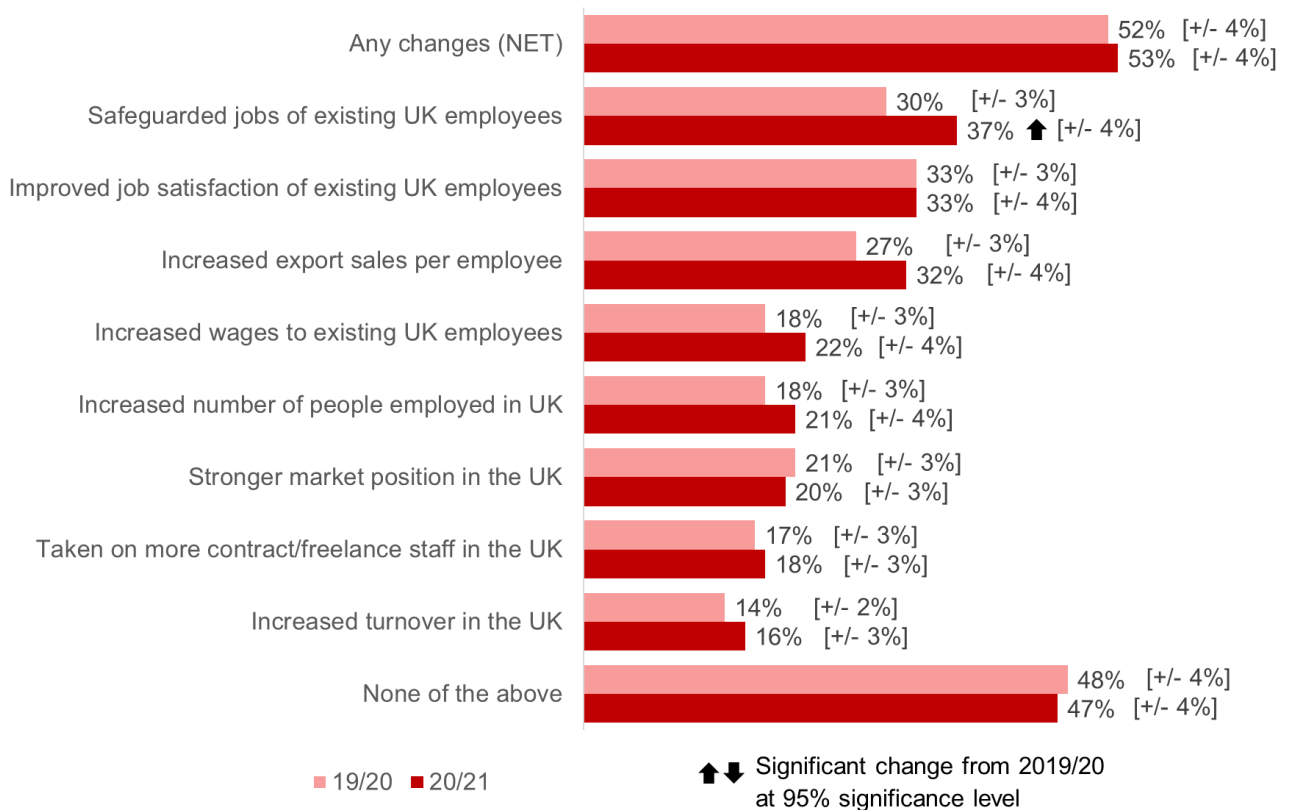
Businesses were asked about the impact they had seen or expected to see as a direct result of using the ITA service. Around a third of businesses said they thought using the ITA service had, or would, safeguard jobs in the UK (37%), improve job satisfaction among existing UK employees (33%) or increase export sales per employee (32%).

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

- safeguarded jobs in the UK (48% versus 32%)
- improved job satisfaction among existing UK employees (42% versus 30%)
- increased export sales per employee (41% versus 30%)
- increased wages to existing UK employees (29% versus 19%)
- an increased number of people employed in the UK (28% versus 14%)

In comparison to the 2019/20 RIS, the proportion of businesses that had seen, or expected to see, safeguarding of existing UK jobs increased (from 30% in 2019/20 to 37%).

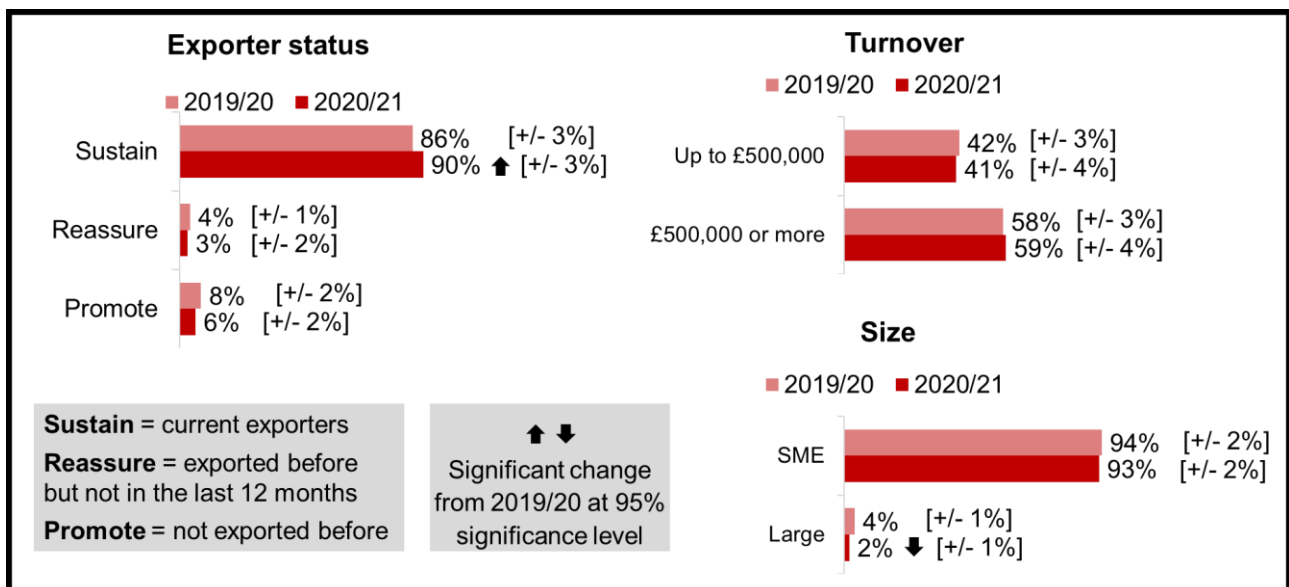
Chart 4.1.22 Changes expected / seen in the UK business as a result of receiving the service – ITAs



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
 Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

4.1.10. Profile of respondents

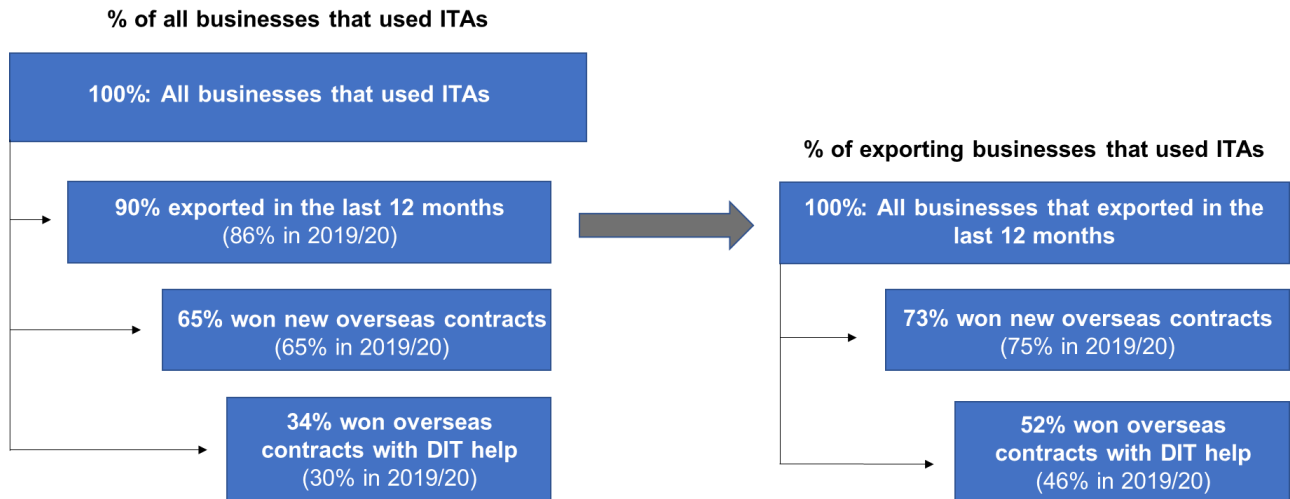
Chart 4.1.23 Profile of RIS Respondents – ITAs



Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

Looking at all businesses supported by ITAs interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), nine in ten (90%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. The turnover and size profiles of the businesses supported by ITAs in the survey remained in line with the previous year.¹⁷

Chart 4.1.24 Summary of businesses supported by ITAs



Median value of export sales won per business with DIT support: **£42,500** (£43,000 in 2019/20)

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

Base: All businesses that used ITAs (n=661 (2020/21), n=854 (2019/20))

¹⁷ There was a higher proportion of 'Don't know' and 'Refused' responses in the Quality Survey 2020/21 for turnover. 'Don't know' and 'Refused' responses have therefore been removed from Turnover to maximise comparability.

4.2. Posts

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

This chapter explores the impact of using the Posts service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 234 businesses that used Posts between April 2020 and March 2021 and participated in both the Quality Survey (QS) and RIS.

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

Actions taken as a result of using Posts

Following their use of the Posts service, seven in ten businesses had identified new export opportunities or made new contacts (70%), while three in five had researched the paperwork and regulations needed to export (57%). Among non-exporters, three in five businesses (61%) had assessed their readiness to export after using Posts.

Compared to the previous year, businesses were more likely to have researched the paperwork and regulations needed to export (57%, up from 46% in 2019/20).

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was similar to the previous year (87% in 2020/21, 91% in 2019/20), but was higher compared to the 2020/21 QS (87% compared to 77%).

Around half (48%) of businesses classified as 'Promote' (i.e. never exported before) in the 2020/21 QS had shifted to 'Sustain' in the RIS 2020/21.

Impact on winning contracts

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

Overall, 66% of businesses won a new overseas contract. This included 35% who said this was with assistance from Posts or DIT, higher than in 2019/20 (26%).

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

Impact on exposure and growth

Nine in ten (89%) businesses said Posts assisted with expansion into a new market and just over half (54%) said Posts assisted with expansion within an existing market. A third (34%) reported being exposed to or starting to do business in at least one new market, higher than in 2019/20 (23%).

Compared to the previous year, Asia replaced Europe as the most common market for increased exposure or business, with 55% reporting increased exposure in Asia. Businesses were less likely to report increased exposure in Europe compared to the previous year (28% compared to 55% in 2019/20), with 20% reporting that their increased exposure or new business was within the European Union (down from 49% in 2019/20).

Impact on contacts and networks

Around two in three businesses (65%) made at least one new overseas contact after using Posts. The average number of contacts made was four, the same as in 2019/20.

Impact on confidence

A third (34%) reported that using the Posts service boosted their confidence to export in a new market, while 24% said this for increasing exports in an existing market. These findings were in line with the previous year.

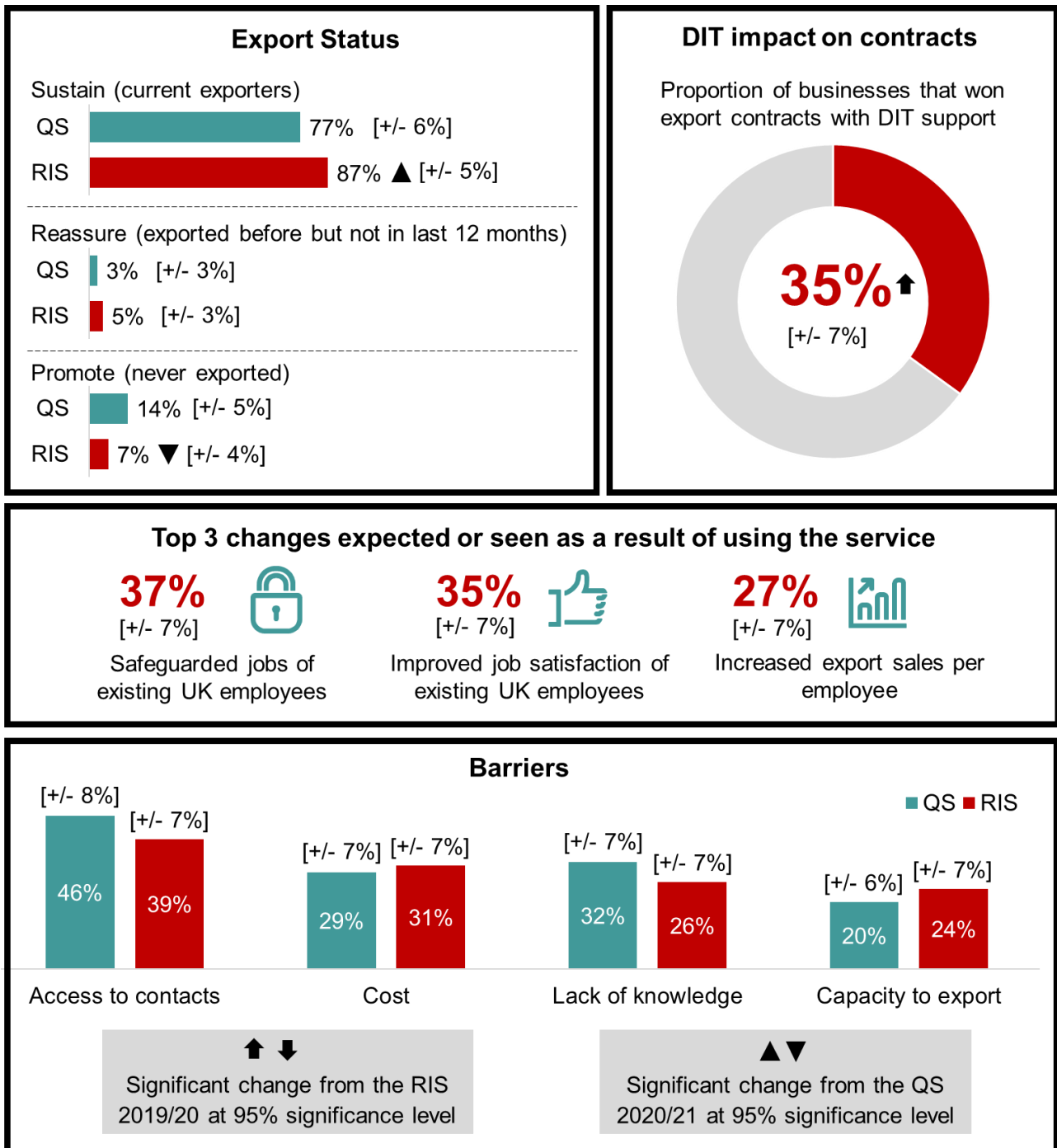
There was a decline in the proportion that said using Posts had improved their knowledge of the price of goods compared with those in overseas markets (5% compared with 12% in 2019/20).

Other impact

More than six in ten (65%) Posts respondents reported that the Posts service helped them gain access to information that they would otherwise have been unable to come by, while more than half (54%) felt it helped them gain access to prospective customers or business partners.

Businesses were more likely to say that using the Posts service had helped them to develop an export business plan (32% compared to 20% in 2019/20).

Chart 4.2.1 Key indicators from the RIS (Posts)



Base: All businesses that used Posts and completed both surveys (n=234); Barriers (QS n=234) – Access to contacts (RIS n=233), Cost (RIS n=231), Lack of knowledge (RIS n=233), Capacity to export (RIS n=229).

4.2.2. Satisfaction with Posts (from Quality Survey)

In the QS 2020/21, over two in five businesses (44%) that used Posts said they would recommend the service, while one in five (21%) said they would not. This gave Posts a NPS of +23. Three-quarters (73%) reported they were satisfied with the Posts service, and two-thirds (65%) said the overall service met their needs.

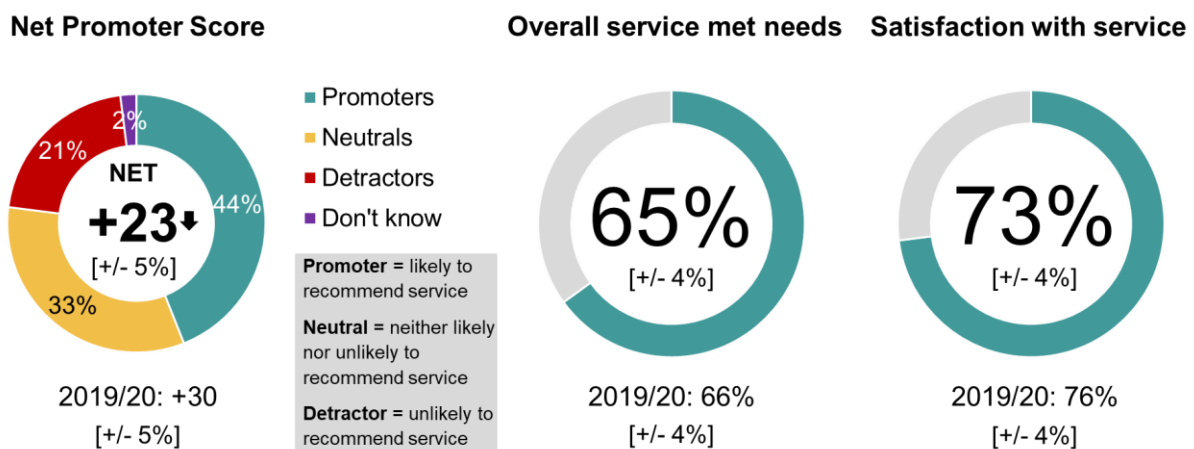
Compared to the previous year, the NPS decreased (+23, down from +30 in 2019/20) while satisfaction remained in line with the previous year.

Posts respondents were particularly positive about staff knowledge (85%), and this represents an increase compared to the previous year (85% compared to 78% in 2019/20). Businesses were also more positive about how clear the steps were, both when using the service (74% compared to 63% in 2019/20) and afterwards (63% compared to 56% in 2019/20).

As a result of using Posts, around half of businesses (55%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all Posts respondents, two-thirds (67%) said they had identified new export opportunities or made new contacts, while half said they had researched the paperwork and regulations needed to export - an increase from the previous year (49% compared to 40% in 2019/20).

Posts respondents were most likely to report that 'access to networks' was a barrier to exporting (44%), followed by 'cost' (36%). The barriers reported by Posts respondents were in line with the previous year.

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



From the Quality Survey 2020-21:

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

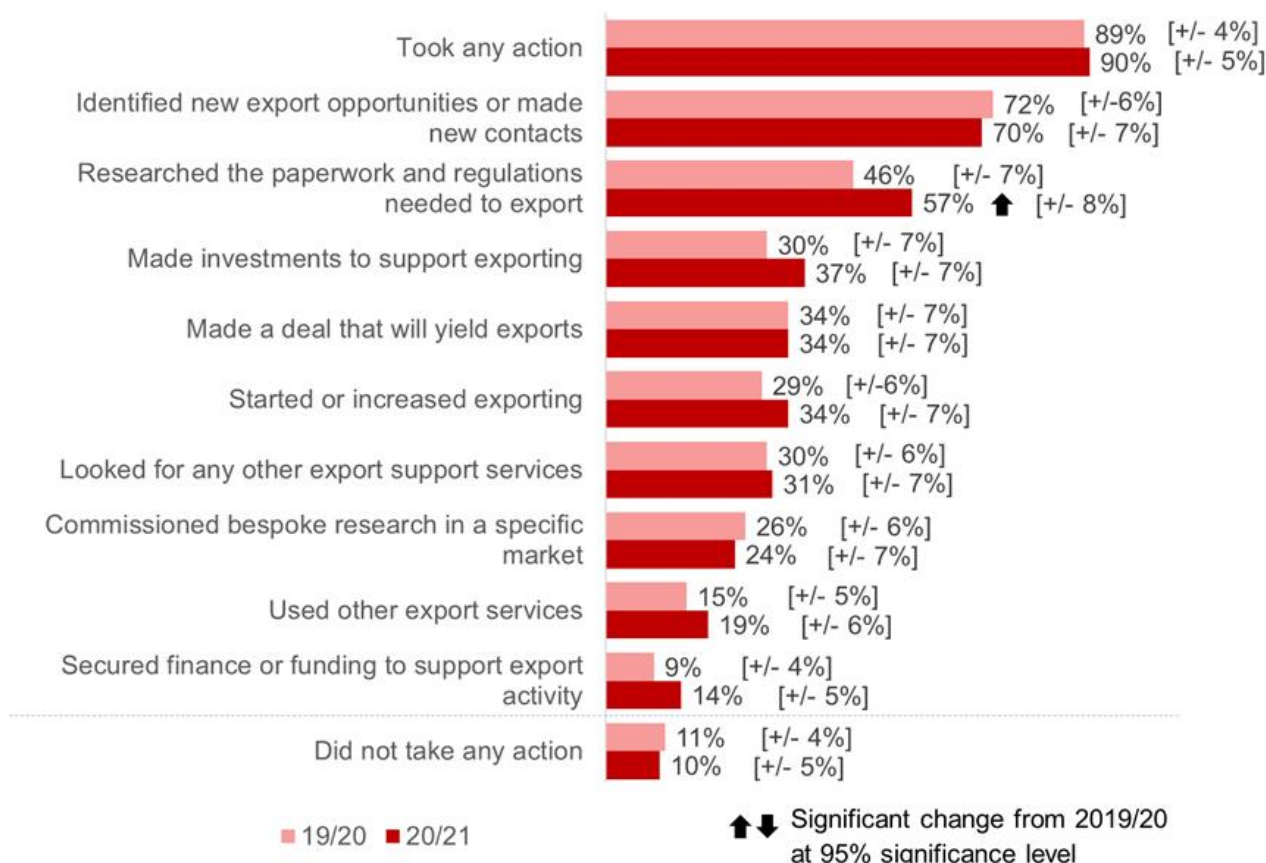
Qqualinfo – Using that same scale, how would you rate ... the extent to which the overall service received met your needs? Base: All businesses that used Posts (excluding 'not applicable' responses) (n=605).

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

4.2.3. Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the Posts service (Chart 4.2.3). Seven in ten businesses reported that they had identified new export opportunities or made new contacts (70%), while nearly three in five had researched the paperwork and regulations needed to export (57%).

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



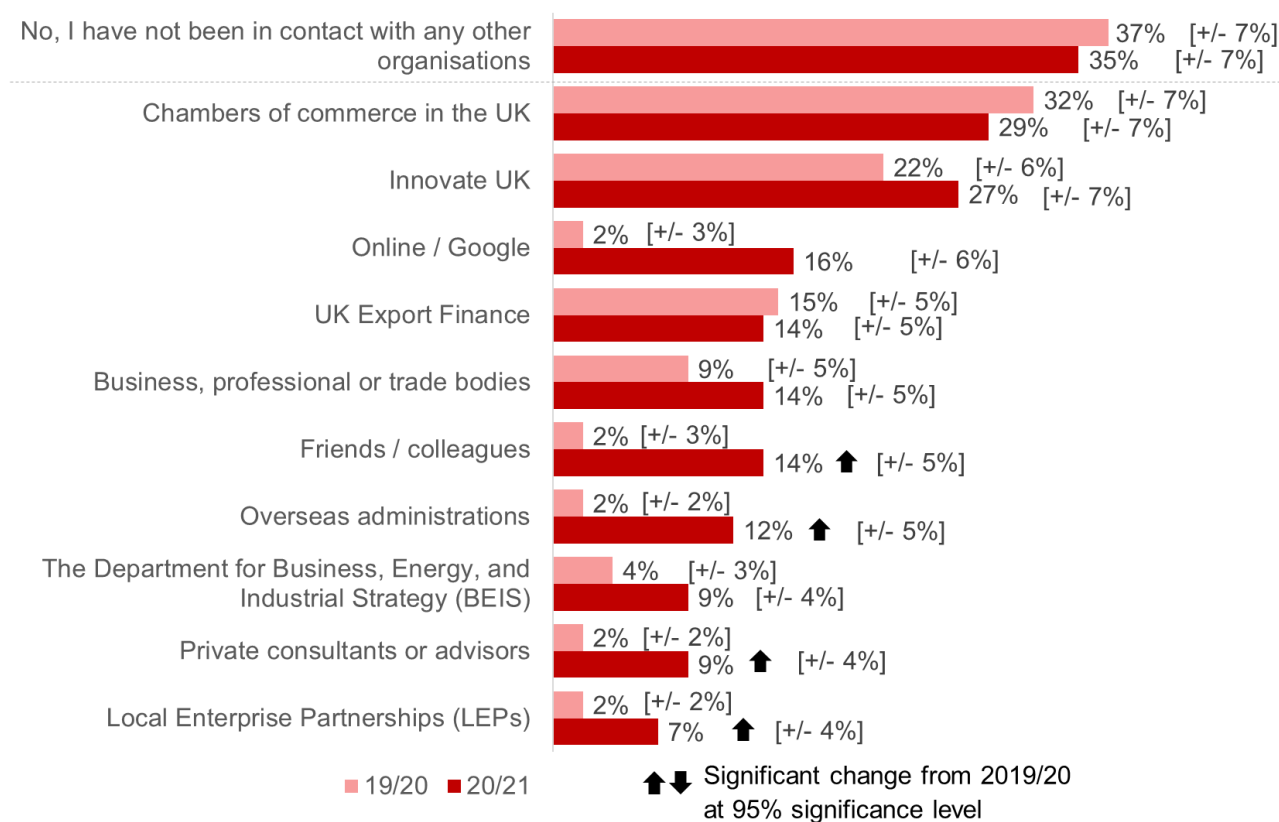
QResultService: What has your business done as a result of Posts? Base: All businesses that used Posts (n=234 (2020/21), n=264 (2019/20)). 'Took any action' includes non-exporters who responded 'Assessed company's readiness to export'.

Businesses were asked what organisations they had been in contact with since using Posts. Around three in ten had been in contact with the British Chambers of Commerce (29%) or with Innovate UK (27%). Around a third (35%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Businesses with a turnover of over £500,000 were more likely to have been in contact with the British Chambers of Commerce than businesses with a turnover of less than £500,000 (35% and 17% respectively).

In comparison to the 2019/20 RIS, businesses were more likely to have been online or on Google (16%, up from 2% in 2019/20), or in contact with friends/colleagues (14%, up from 2%), overseas administrations (12%, up from 2%), private consultants or advisors (9%, up from 2%) or Local Enterprise Partnerships (7%, up from 2%).

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



QAnyContact: And again, since your business used Posts in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities? Base: All businesses that used Posts (n=234 (2020/21), n=264 (2019/20)). Coded responses with 5% or more are included.

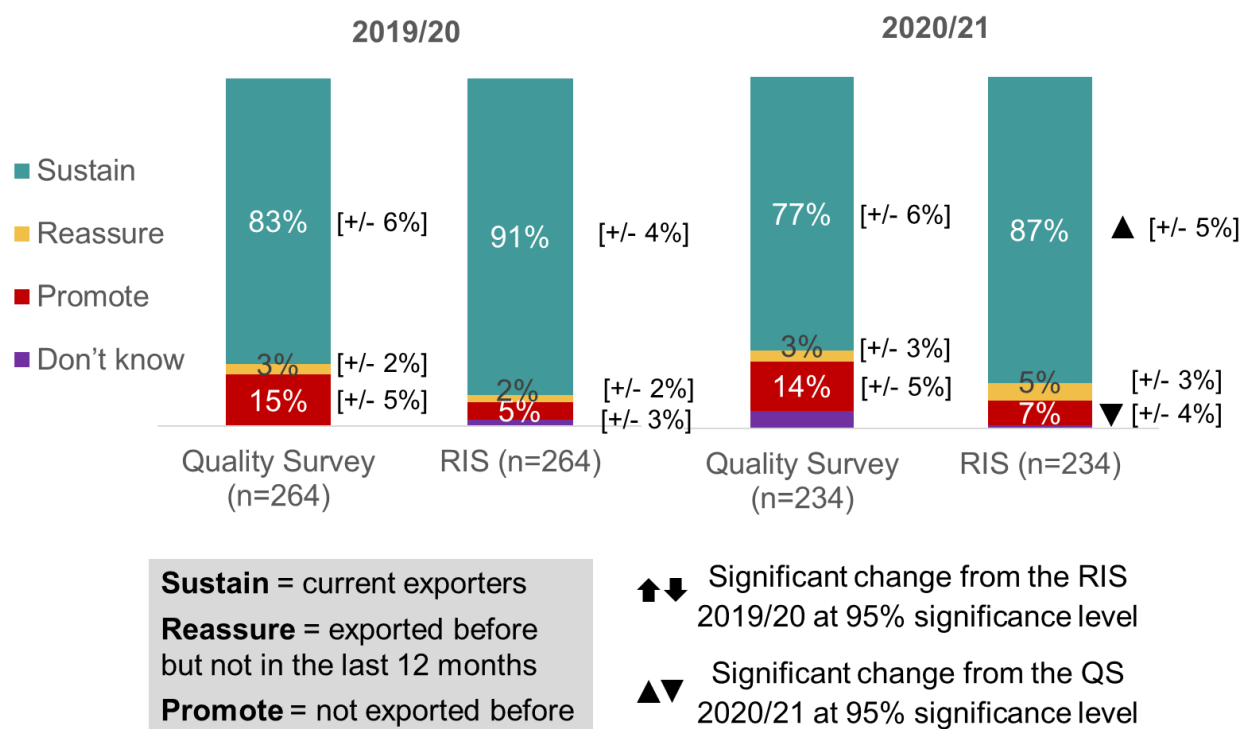
4.2.4. Reported impact on exporting

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

- **Sustain:** refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Three-quarters of businesses (77%) that used Posts fell into this segment at the time of the service delivery (QS 2020/21). This increased to 87% in the RIS 12 months later.
- **Reassure:** refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Three per cent that used Posts fell into this segment at the time of the service delivery (QS 2020/21), and this was unchanged 12 months later (five per cent).
- **Promote:** refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. One in seven (14%) that used Posts were in this segment at the time of the service delivery (QS 2020/21). This decreased 12 months later to seven per cent. These findings are in line with the RIS 2019/20.

These findings were in line with the previous year of the Quality Survey and the Reported Impact Survey (2019/20).

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



Source: Composite measure merging data from several variables. Base: All businesses that used Posts and completed both surveys (Quality Survey: n=234 (2020/21), 264 (2019/20). RIS: n=234 (2020/21), 264 (2019/20))

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

Five businesses from the Reassure segment moved to Sustain¹⁸, two per cent of businesses in the Sustain segment moved to Reassure, and one per cent moved from the Sustain segment to Promote. These findings were in line with the previous year (2019/20).

¹⁸ Note low base size in Reassure segment (n=9 in 2020/21).

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

Quality Survey Export status	RIS Export status	Percentage	Change since 2019/20
Sustain (n=172)	Sustain	97% [+/- 2%]	-
	Reassure	2% [+/- 2%]	-
	Promote	1% [+/- 1%]	-
Promote (n=32*)	Sustain	48% [+/- 17%]	-
	Reassure	10% [+/- 10%]	-
	Promote	37% [+/- 17%]	-

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

4.2.5. Reported export contracts achieved since receiving the service

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

Of the 87% of businesses that had exported, 82% reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service. This is in line with the RIS 2019/20 (83%).

Around three-quarters (76%) of these exporting businesses had won new overseas business contracts in the year since they used the service (Chart 4.2.6). Specifically, six per cent had won one overseas contract, and around a third (35%) had won between two and five overseas contracts. Over one in eight (15%) businesses had won 16 or more overseas contracts. The median number of contracts won among exporting businesses that had used Posts was two¹⁹.

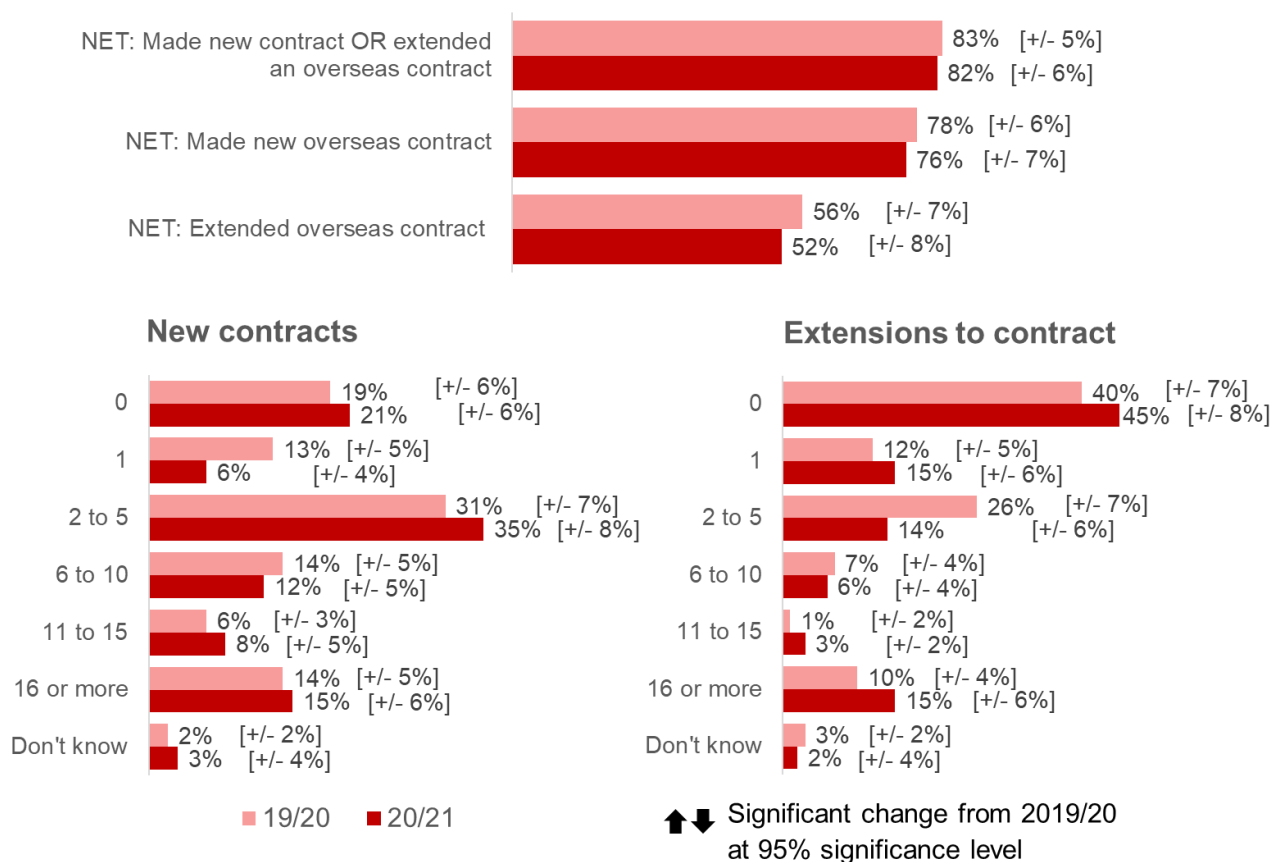
Compared to RIS 2019/20, a smaller proportion of businesses reported winning one new contract (6%, down from 13% in 2019/20). However, this does not correspond to a significant change in the volume of contracts overall so may reflect random variation in the data.

Around half (52%) of exporting businesses that used Posts reported that they had gained extensions to existing overseas business contracts in the year since they used the service. Fifteen per cent extended one contract, and one in seven (14%) extended between two and five contracts. Around one in seven (15%) extended more than 16 existing overseas sales contracts. Almost half (45%) of businesses had not extended any existing contracts (Chart 4.2.6). The median number of contracts extended (including those that did not extend any) was zero.

Compared to RIS 2019/20, a smaller proportion of businesses reported extending between two and five contracts (14%, down from 26% in 2019/20).

¹⁹ This is taken from the 90% that exported and could also provide a figure for the number of contracts won. It includes those that export but did not win any new contracts in the 12 months since they used the service.

Chart 4.2.6 Proportion of businesses that exported and reported they had made new overseas contracts and / or extended existing contracts, and number of contracts made in previous 12 months – Posts²⁰



Q_Newcontract: Firstly, how many new overseas business contracts for export sales did you win in the past year?

Q_Extendcontract: And how many extensions to existing overseas business contracts for export sales did you win in the past year?

Base: All businesses that used Posts and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (n=202 (2020/21), n=243 (2019/20))

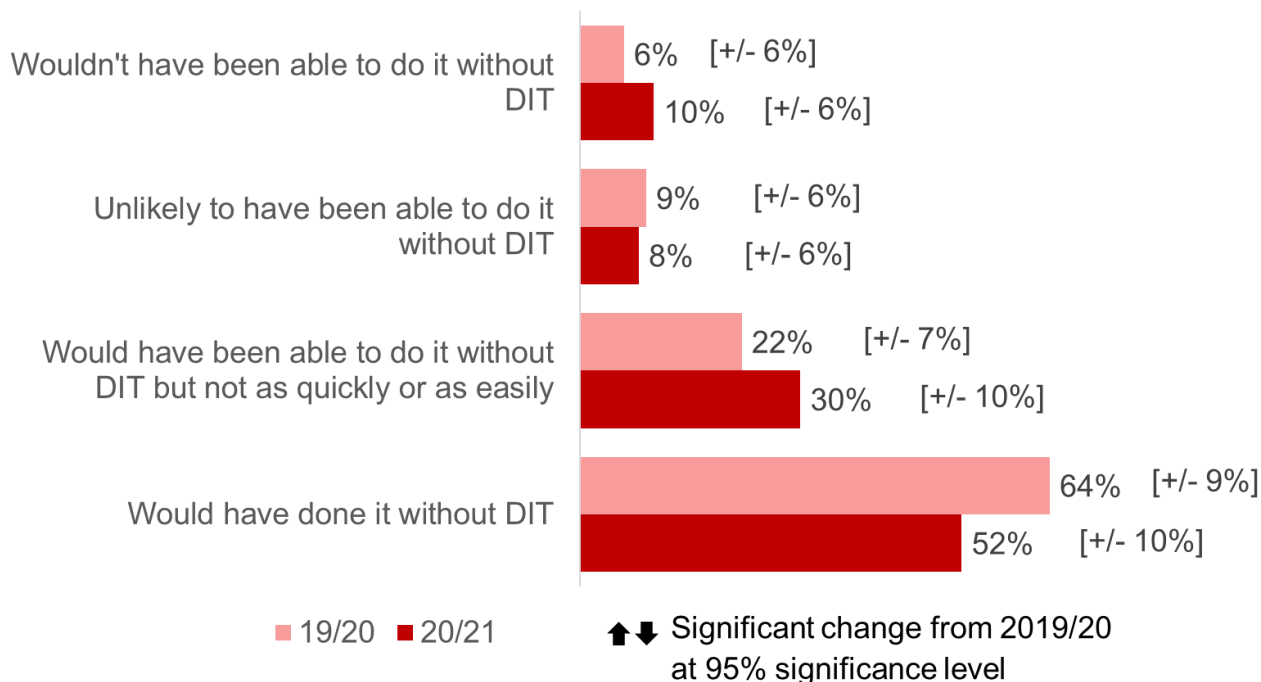
Importance of DIT's support in winning overseas contracts

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

Around half of these businesses (48%) reported that DIT support was important in helping them win these contracts to some extent. One in ten (10%) of those who won at least one new overseas contract said they would not have been able to do it without DIT, while eight per cent thought it was unlikely they could have done it without DIT. Three in ten (30%) thought they would not have been able to do it as quickly or easily without DIT support (Chart 4.2.7). The remaining 53% thought they would have been able to achieve the same outcome without DIT support. These results are in line with the previous year.

²⁰ The total percentage of all responses for this question may not sum to 100 per cent due to rounding.

Chart 4.2.7 How important DIT’s help was in winning overseas contracts – Posts



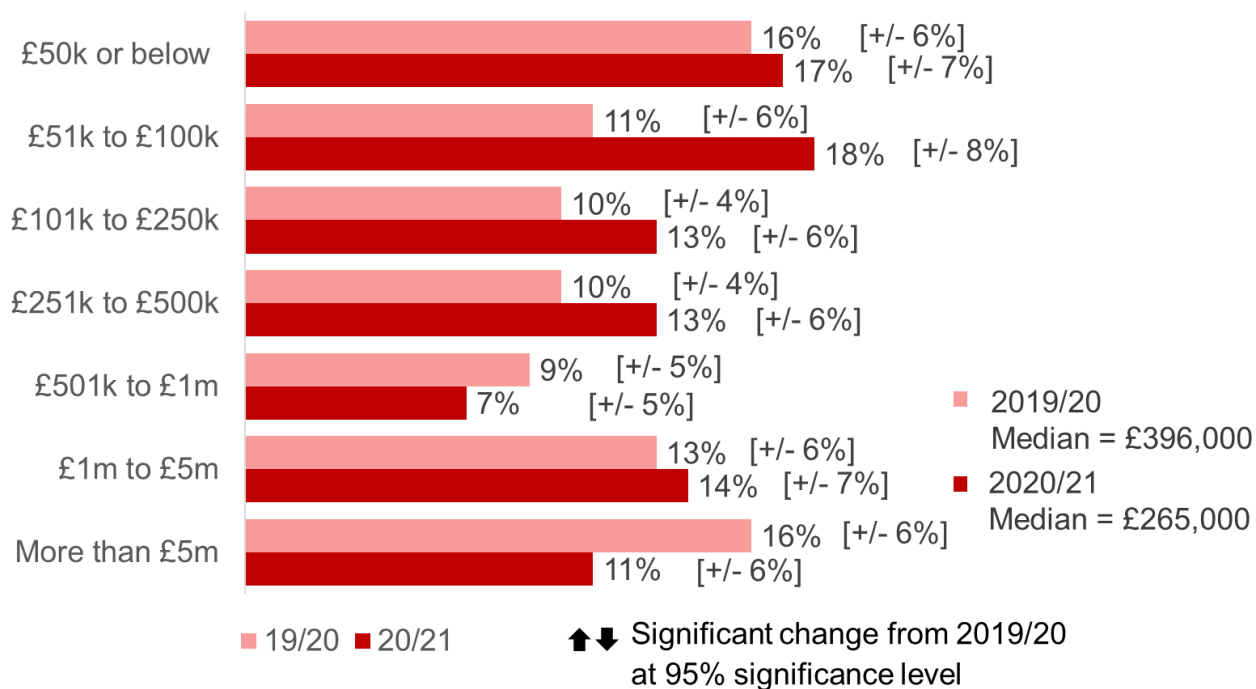
QContractHelp: How important was DIT's help in winning these overseas contracts
 Base: All businesses that used Posts and won any new overseas contracts in the past year (n=120 (2020/21), n=156 (2019/20))

4.2.6. Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 66% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts in total (Chart 4.2.8). The median value of the export sales of all new overseas contracts for these businesses was £265,000 (compared to £396,000 in RIS 2019/20). One in six (17%) had won contracts with an export sales value of £50,000 or below. A quarter (25%) said that the export sales value of the new overseas contracts won was more than £1 million. These results are in line with the previous year.

Chart 4.2.8 Value of all new overseas contracts made in previous 12 months – Posts



QContractValue: What is the value of all these new overseas business contracts for export sales?
 Base: All businesses that used Posts and won any new overseas business contracts (n=151 (2020/21), n=187 (2019/20))

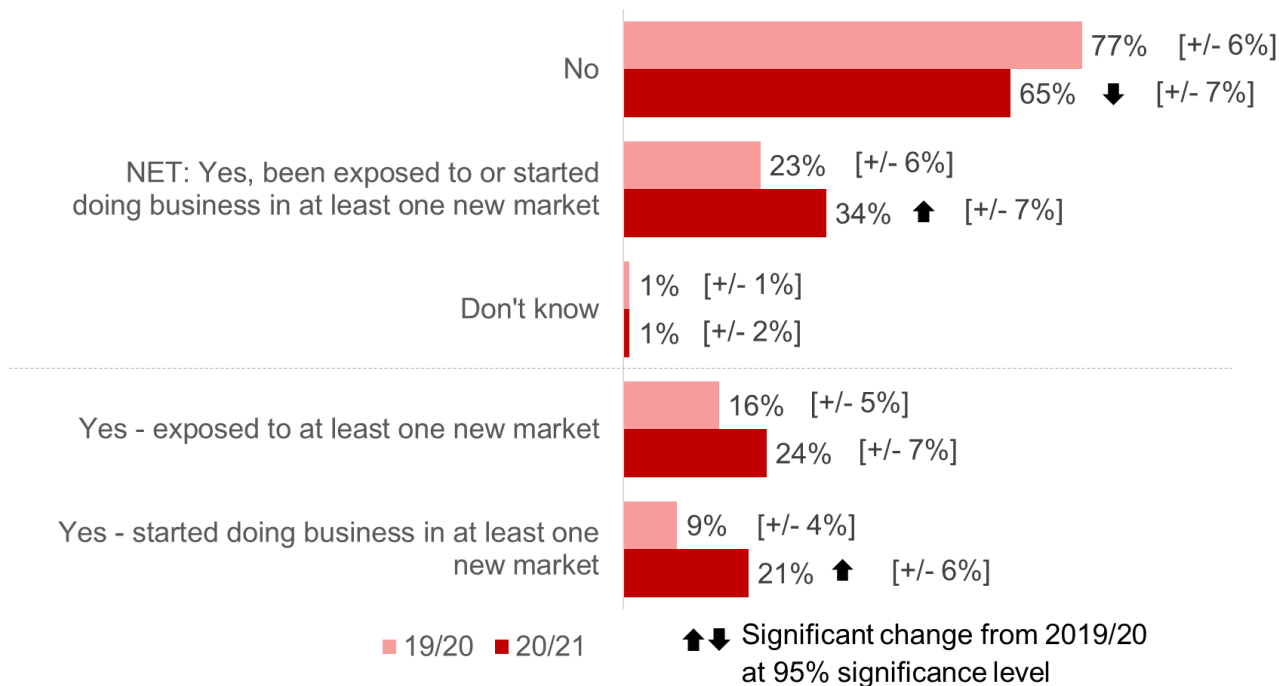
4.2.7. Recorded exposure and growth within new markets

All businesses that used Posts were asked whether they had increased their exposure or started doing business in any new markets because of using the Posts service²¹. Similar proportions of businesses said they had been exposed to at least one new market (24%) and had started doing business in at least one new market (21%) as a result of using the Posts service.

Compared to the previous year, more businesses reported that they had started doing business in at least one new market (21% compared to 9% in 2019/20). There was also an increase in the overall proportion that said they had either been exposed to, or had started doing business in, at least one new market (34% compared to 23% in 2019/20).

²¹ Respondents could select both if they had been exposed to at least one new market and if they had started doing business in at least one new market.

Chart 4.2.9 Whether increased exposure or starting business in a new overseas market – Posts



QGrowthDIT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
 Base; All businesses that used Posts (n=234 (2020/21), n=264 (2019/20))

4.2.8. Barriers to exporting

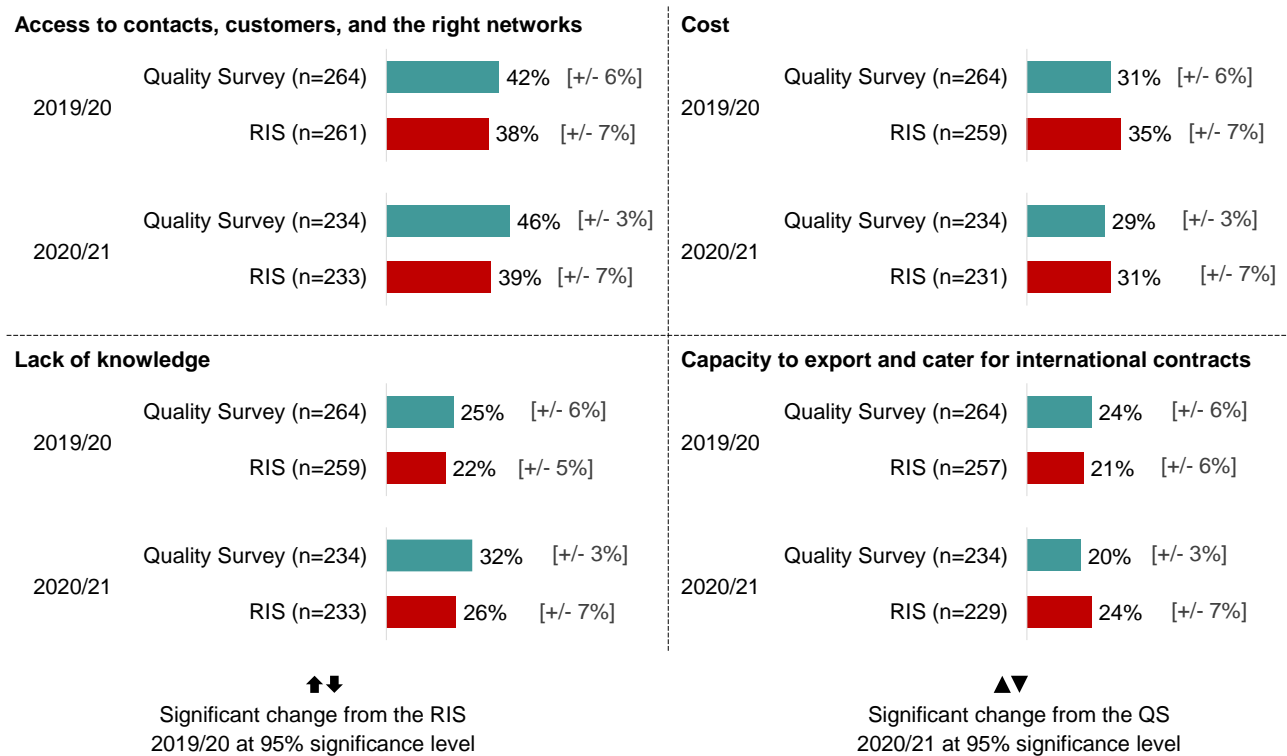
Businesses were asked in both the QS and RIS about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)²².

The top barrier in RIS 2020/21 was 'access to contacts' (39%), followed by 'cost' (31%). 'Lack of knowledge' and 'capacity to export' were both seen as a barrier by around one in four businesses (26% and 24% respectively).

These results were in line with the previous year and with responses in the QS 2020/21.

²² This section compares results for businesses who completed both surveys and provided a response to this question in both surveys. Businesses that said a barrier was not applicable in either survey were excluded.

Chart 4.2.10 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Posts²³



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

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

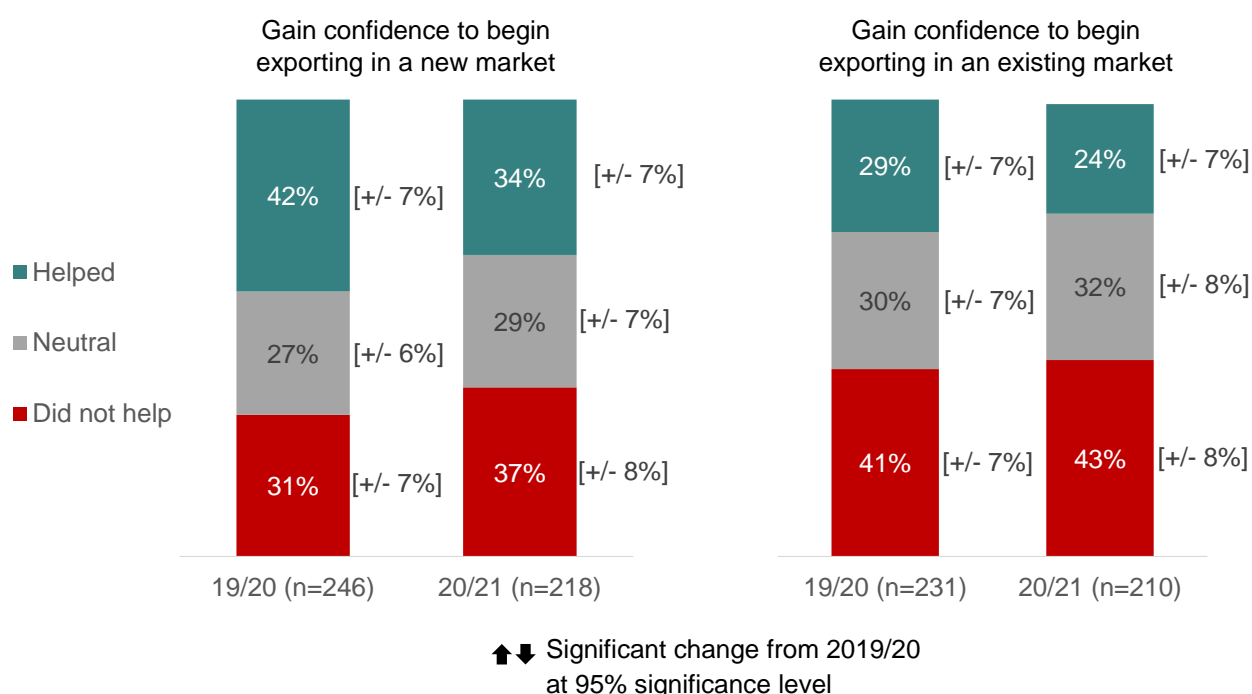
4.2.9. Wider benefits of the service

Businesses were asked to think about the extent to which using the Posts service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market. A third (34%) of businesses reported that using the Posts service had given them confidence to begin exporting in a new market, while a similar proportion (37%) said the service had not helped them in this way. A quarter (24%) reported that using the Posts service had given them confidence to begin exporting in an existing market, but a larger proportion (43%) said the service did not help them to do this.

Businesses with a turnover of less than £500,000 were more likely to say that using the Posts service had given them confidence to begin exporting in an existing market (35%), compared with businesses with a turnover of over £500,000 (19%).

These results are in line with the previous year.

Chart 4.2.11 To what extent using the Posts service helped to build confidence to export



GainConfidence: On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of Posts help you to...? Helped (7-10), Neutral (4-6), Did not help (0-3). Base: All businesses that used Posts not including those who gave a 'not applicable' answer.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**²⁴. Chart 4.2.12 below shows how businesses rated the impact of using the Posts service on their knowledge.

On balance, more businesses reported that using the Posts service was **helpful for increasing their knowledge of support available to them (from DIT and elsewhere)** and for **increasing their knowledge of export opportunities available**. Two in five (41%) said the service helped to increase their knowledge of support available to them, while a quarter (24%) said it did not help them do this. A third (34%) reported that using the Posts service was helpful for increasing their

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

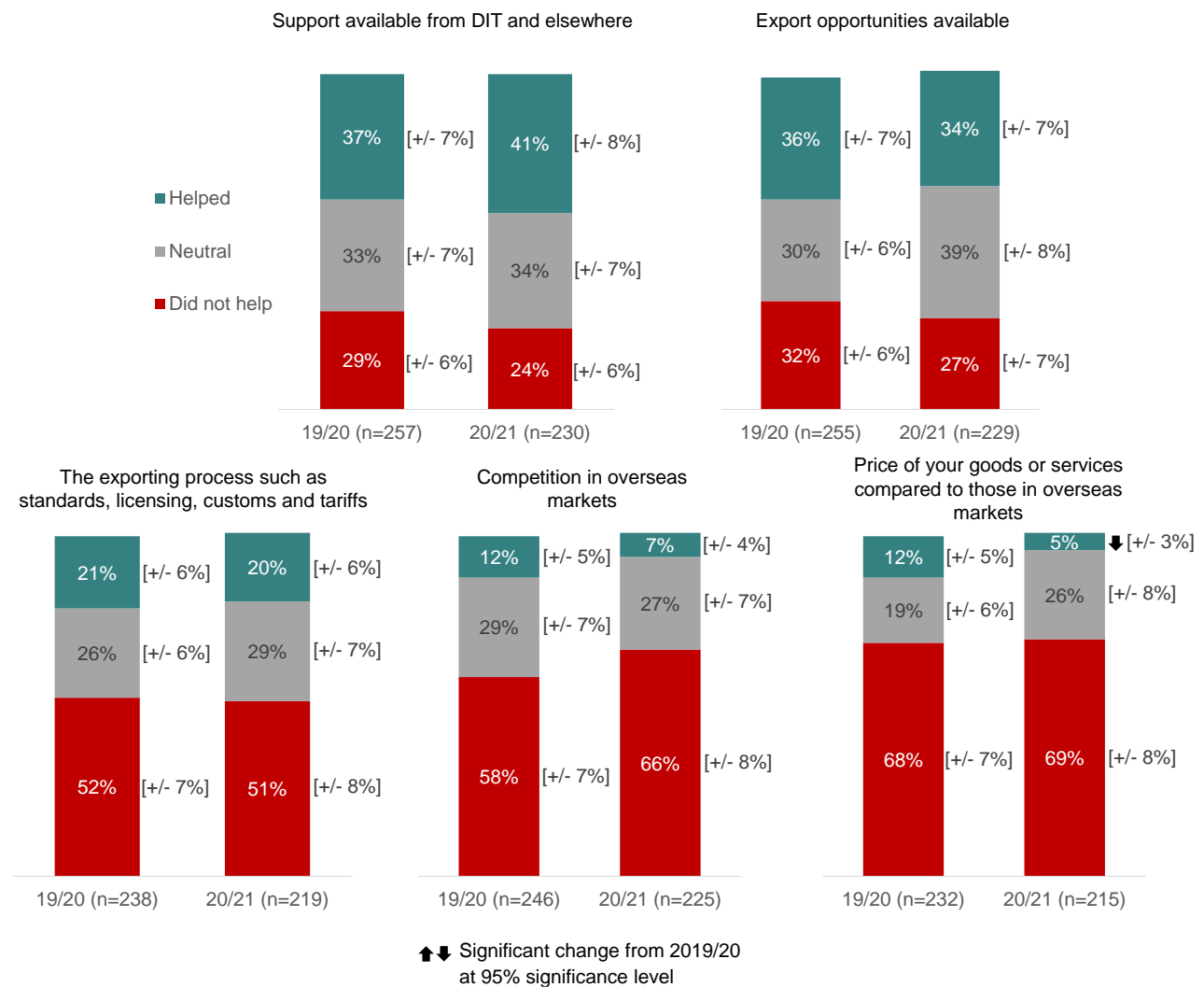
knowledge of export opportunities available, with 27% saying the service did not help them to do this.

However, half (51%) of businesses said that the service did **not help to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs (a fifth (20%) of businesses that had used Posts said the service did help them in this way). Businesses with a turnover of less than £500,000 were more likely to say that the Posts service had helped to improve their knowledge of the exporting process (33%), compared with businesses with a turnover of over £500,000 (15%).

Only small proportions said that using Posts improved their **knowledge of the price of goods** compared with those in overseas markets (5%) or about their **competitors in overseas markets** (7%).

These findings were in line with the previous year (2019/20), apart from a decline in the proportion that said using Posts had improved their knowledge of the price of goods compared with those in overseas markets (5% compared with 12% in 2019/20).

Chart 4.2.12 To what extent the business felt that their knowledge has improved as a result of using the service – Posts



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

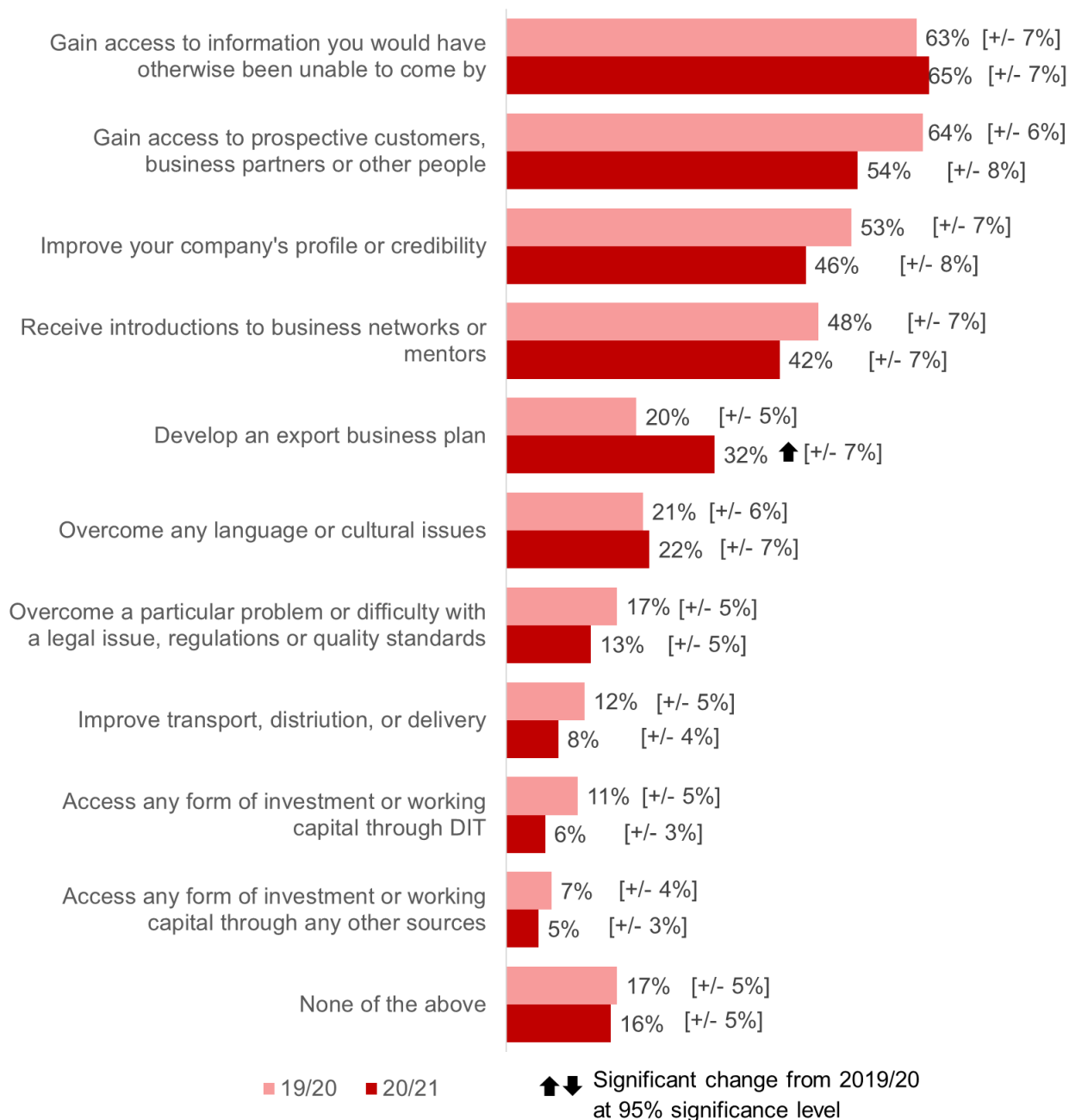
Businesses were asked about other ways they had benefitted from using Posts in the year between dealing with the Posts and taking part in the RIS.²⁵ A detailed breakdown of responses is shown in Chart 4.2.13.

The top responses were: helping businesses to gain access to information that they would otherwise have been unable to come by (65%), or gaining access to prospective customers, business partners or other people that they otherwise would have been unable to meet (54%). One in six (16%) felt that using the Posts service had not helped them in any of the ways listed.

Compared to the 2019/20 RIS, there was an increase in the proportion of businesses that developed an export business plan, from 20% to 32%. There were no other changes compared to the 2019/20 RIS.

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

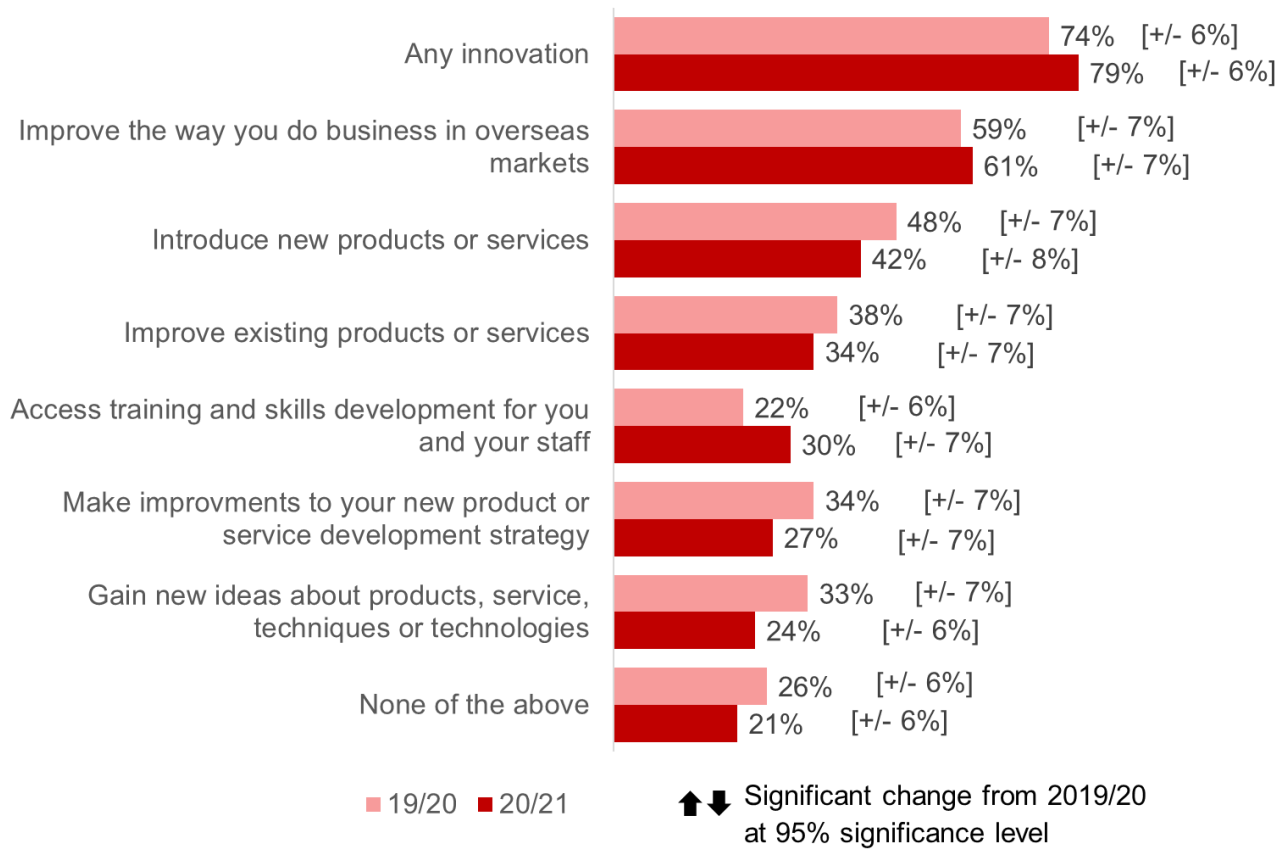
Chart 4.2.13 In what ways has the business felt it benefited from DIT support – Posts



QServiceBenefit: in which of the following ways if any, has your business benefited specifically from Posts over the last year? Base: All businesses that used Posts (n=234 (2020/21), n=264 (2019/20))

Businesses were asked whether using the Posts service had helped, or was likely to help, support innovation and/or development in their business. Four in five (79%) said that using the service helped them with innovation or development in some form. The most frequent responses were: to improve the way they do business overseas (61%), to introduce new products or services (42%) and to improve existing products or services (34%). These findings were in line with the 2019/20 RIS.

Chart 4.2.14 Whether the service has / is likely to help innovation and development – Posts



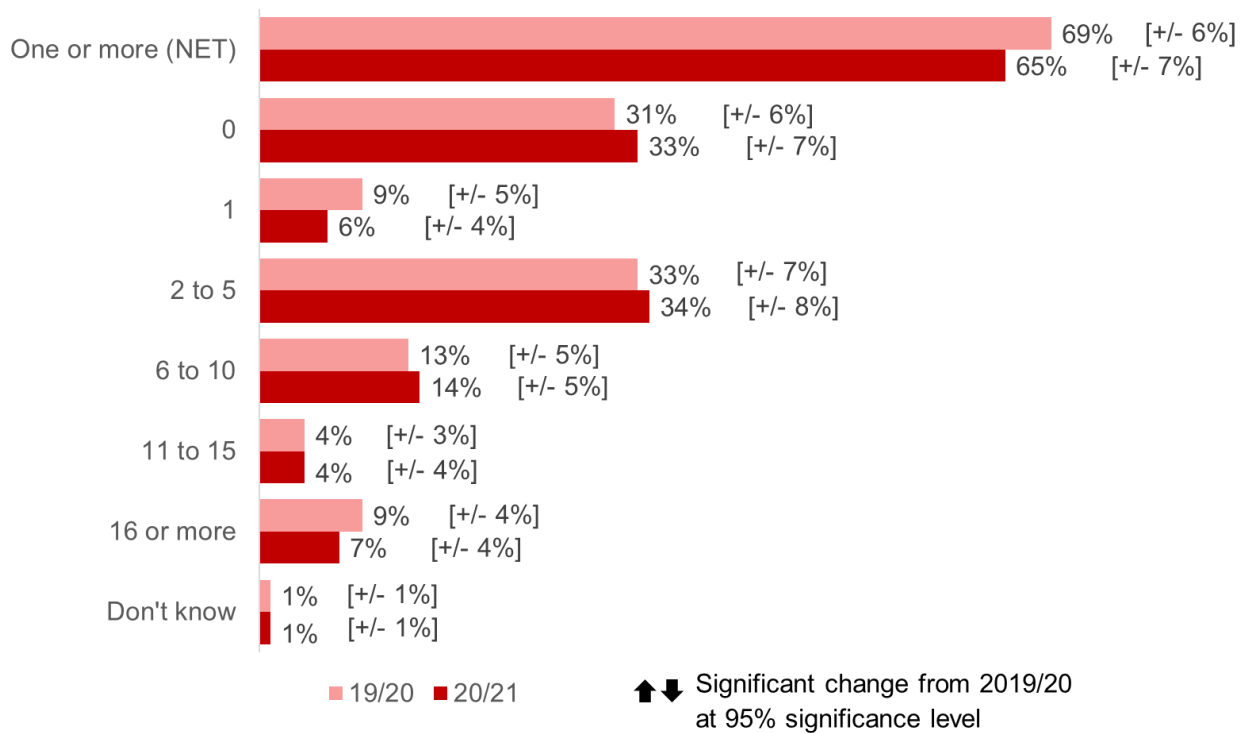
QInnovationSupport: Still thinking of Posts, has this service helped or do you expect it to help your business with development and/or innovation? Base: All businesses that used Posts (n=234 (2020/21), n=264 (2019/20))

International contacts

Businesses were asked how many overseas contacts they had made as a result of using Posts over the past year (Chart 4.2.15). Around two-thirds (65%) of businesses made at least one new overseas contact in the year since using the Posts service, a third (34%) made between two and five new contacts and 11% made more than ten. A third (33%) of businesses reported that they had not made any new contacts as a result of using the Posts service. These findings were in line with the 2019/20 RIS.

The average number of contacts made was four, the same as in the 2019/20 RIS.

Chart 4.2.15 Number of new overseas contacts made in previous 12 months – Posts

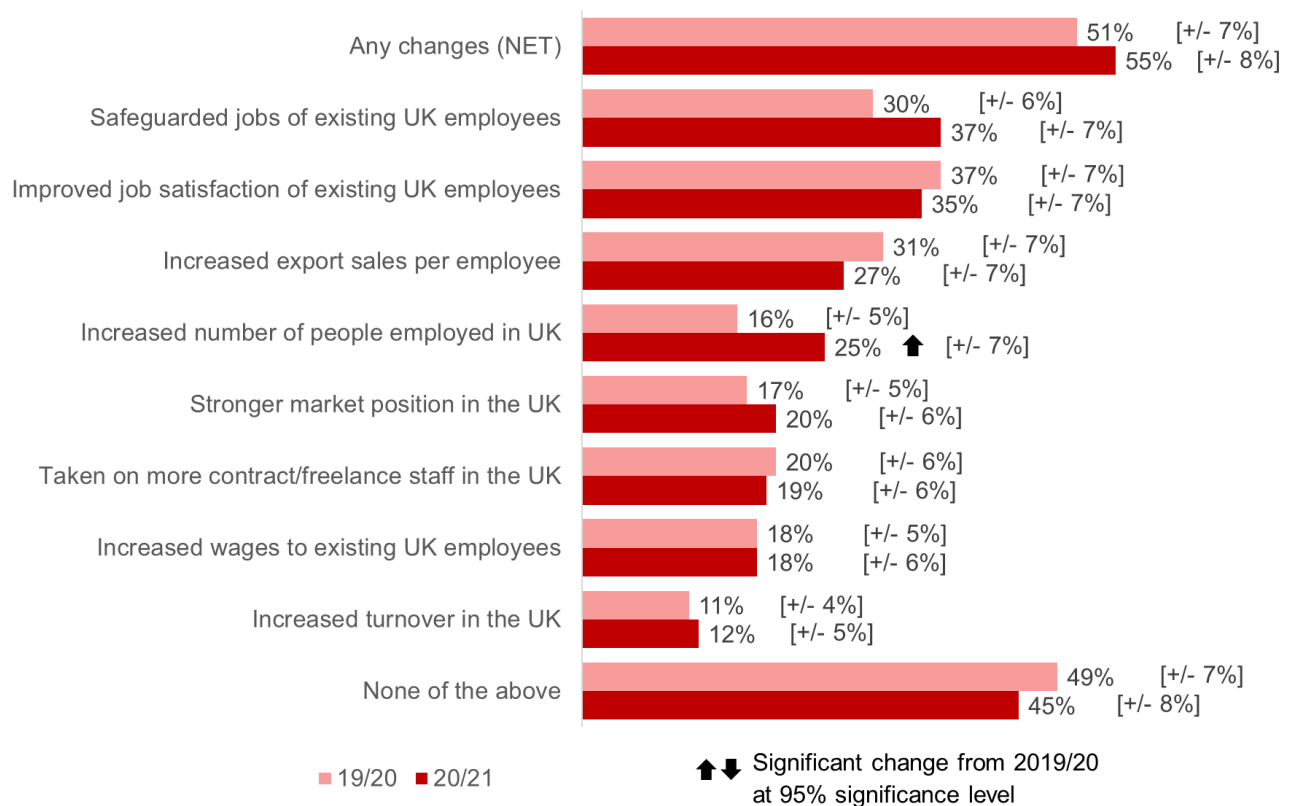


Q_ContactsMade: How many new overseas contracts, if any, did your business make as a result of Posts in the past year? Base: All businesses that used Posts (n=234 (2020/21), n=264 (2019/20))

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Posts service. Over a third of businesses said they thought using the Posts service had, or would, safeguard jobs in the UK (37%) and improve job satisfaction among existing UK employees (35%).

In comparison to the 2019/20 RIS, businesses were more likely to say that they had seen, or expected to see, an increase in the number of people employed in the UK (25% compared with 16% in 2019/20).

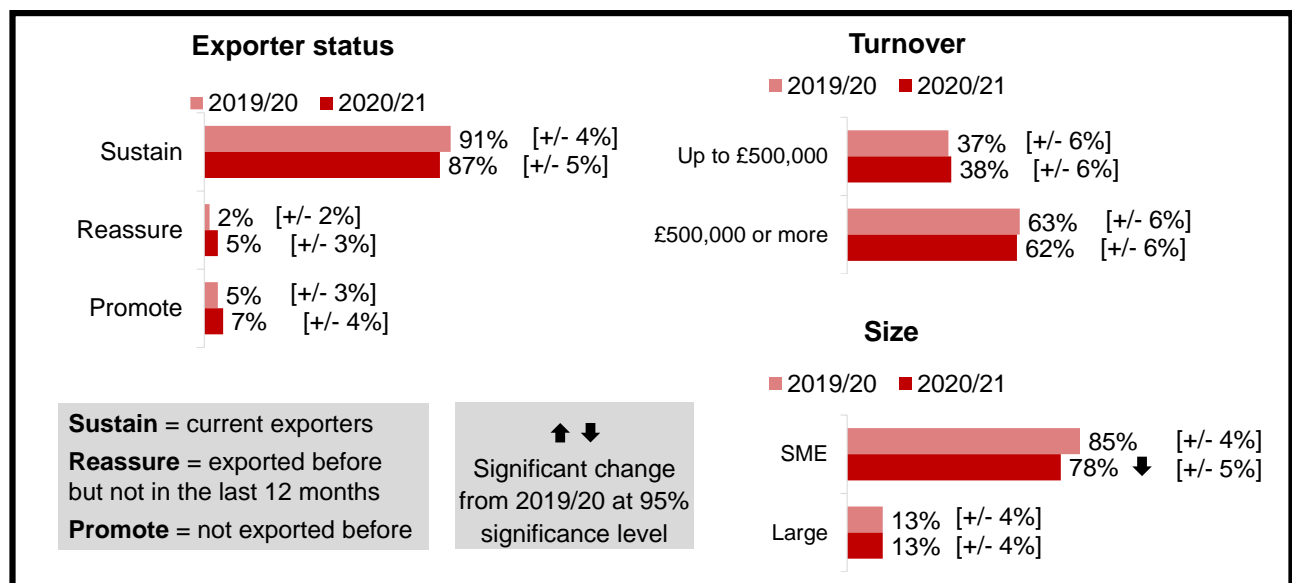
Chart 4.2.16 Changes expected / seen in the UK business as a result of receiving the service – Posts



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of Posts? Base: All businesses that used Posts (n=234 (2020/21), n=264 (2019/20))

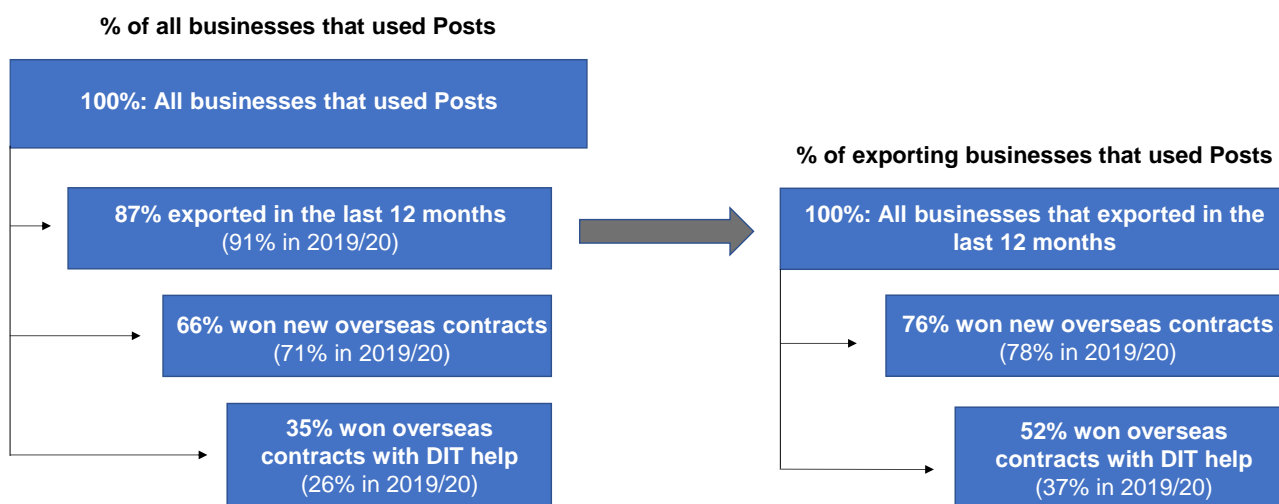
4.2.10. Profile of respondents

Chart 4.2.17 Profile of RIS Respondents – Posts



Looking at all businesses supported by Posts interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the RIS), almost nine in ten (87%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. The turnover profile of the businesses supported by Posts in the survey remained in line with the previous year²⁶, while there was a decrease in the proportion of SMEs from 2019/20 (85%) to 2020/21 (78%).

Chart 4.2.18 Summary of businesses supported by Posts



Median value of export sales won per business with DIT support: **£64,000** (£83,000 in 2019/20)

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

Base: All businesses that used Posts (n=234 (2020/21), n=264 (2019/20))

²⁶ There was a higher proportion of 'Don't know' and 'Refused' responses in the Quality Survey 2020/21 for turnover. 'Don't know' and 'Refused' responses have therefore been removed from Turnover to maximise comparability.

4.3. Webinars

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

This chapter explores the impact of using the Webinars service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 973 businesses that used Webinars between April 2020 and March 2021 and participated in both the Quality Survey (QS) and RIS.

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

Actions taken as a result of using Webinars

Following their use of the Webinars service, two-thirds of businesses reported that they had researched the paperwork and regulations needed to export (68%), while 43% had identified new export opportunities or made new contact. Among non-exporters, around half (53%) had assessed the business' readiness to export after using Webinars.

Compared to the previous year, businesses were more likely to have researched the paperwork and regulations needed to export (68%, up from 50% in 2019/20). Businesses were less likely to have started or increased exporting (20%, down from 33% in 2019/20) and were also less likely to have commissioned bespoke research in a specific market (12%, down from 24% in 2019/20).

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was in line with the previous year (85% compared to 81% in 2019/20), and also similar to the QS 2020/21 (86%). There was an increase in the proportion classified as 'Reassure' from two per cent in the QS 2020/21 to seven per cent in the RIS 2020/21. Otherwise, these findings were in line with the previous year.

Impact on winning contracts

Of the businesses that exported, three-quarters (74%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Webinars service.

Overall, 57% of businesses won a new overseas contract, including 18% saying this was with Webinars or DIT assistance. Among businesses that reported DIT support was important in helping them win these contracts, four per cent said they would have been unlikely, or not able at all, to do this without DIT. These findings were in line with the previous year.

Impact on exposure and growth

Three in five (61%) businesses said Webinars assisted with expansion into a new market and four in five (81%) said Webinars assisted with expansion within an existing market. One in ten (10%) reported being exposed to or starting to do business in at least one new market, lower than in the previous year (17%).

Compared to the previous year, Asia (43%) replaced Europe (41%) as the most common market for increased exposure or business.

Impact on contacts and networks

A quarter of businesses (24%) made at least one new overseas contact after using Webinars (one contact on average, down from three in 2019/20), although 73% reported DIT support did not make any difference to making exporting contacts.

Impact on confidence

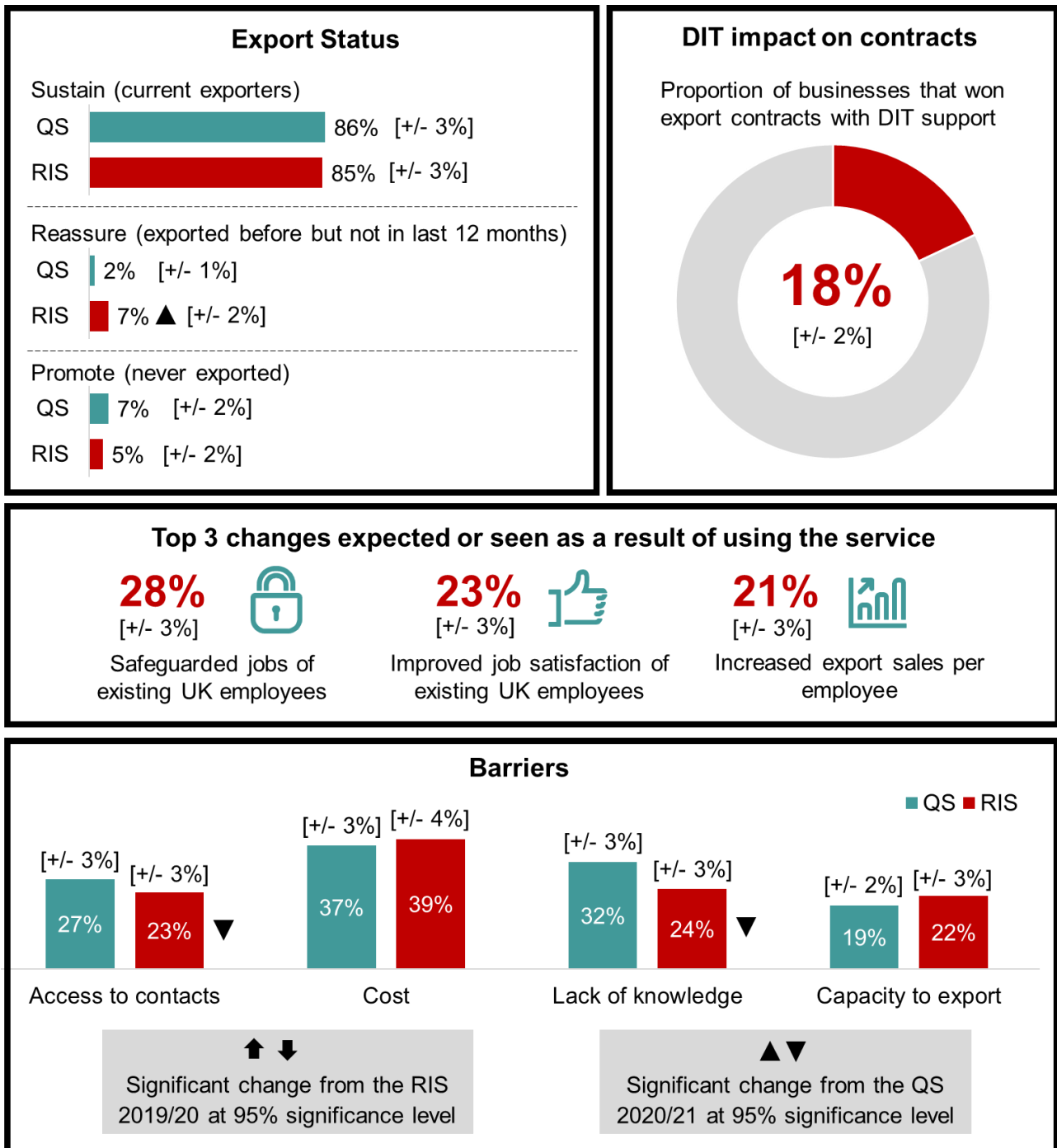
One in five (20%) reported that using the Webinars service boosted their confidence to export in a new market, while a similar proportion (21%) said this for increasing exports in an existing market. Compared to the previous year, fewer businesses reported that using the Webinars service boosted their confidence to export in a new market (31% in 2019/20) or an existing market (35% in 2019/20).

Other impact

Over half (54%) of Webinars respondents reported that the Webinars service helped them to gain access to information that they would otherwise have been unable to come by.

However, businesses felt less positive that using the Webinars service had helped them to increase their knowledge of available export opportunities (20% compared to 35% in 2019/20).

Chart 4.3.1 Key indicators from the RIS (Webinars)



Base: All businesses that used Webinars and completed both surveys (n=973); Barriers (QS n=973) – Access to contacts (RIS n=955), Cost (RIS n=943), Lack of knowledge (RIS n=952), Capacity to export (RIS n=943).

4.3.2. Satisfaction with Webinars (from Quality Survey)

In the QS 2020/21, two in five businesses (40%) that used Webinars said they would recommend the service, while a quarter (27%) said they would not. This gave Webinars a Net Promotion Score (NPS) of +14. Around seven in ten (68%) reported they were satisfied with the Webinars service, and around six in ten (57%) said the overall service met their needs.

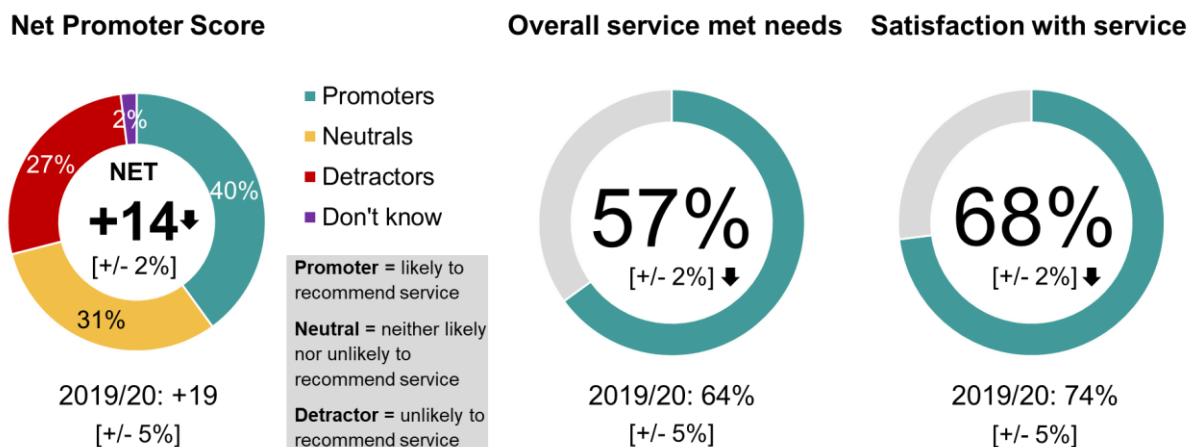
Compared to the previous year, the NPS decreased (+14, down from +19 in 2019/20). Satisfaction with Webinars also decreased (68% compared to 74% in 2019/20), and fewer businesses felt that the service met their needs (57% compared to 64% in 2019/20).

Webinars respondents were most positive about staff knowledge (81%). Compared to the previous year, more businesses gave negative ratings about the clarity of the steps they needed to take, both when using the service (7% compared to 3% in 2019/20) and afterwards (11% compared to 7% in 2019/20).

As a result of using Webinars, 57% of businesses said they had researched the paperwork and regulations needed to export, an increase from the previous year (57% compared to 48% in 2019/20). Two in five businesses (38%) that were not exporting at the time of using the service had assessed the business' readiness to export, and this was a decrease from the previous year (58% in 2019/20).

Webinars respondents were most likely to report that 'cost' was a barrier to exporting (36%), followed by 'lack of knowledge' (31%) and 'access to networks' (29%).

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



From the Quality Survey 2020-21:

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 businesses that used Webinars (n=2,378).

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

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

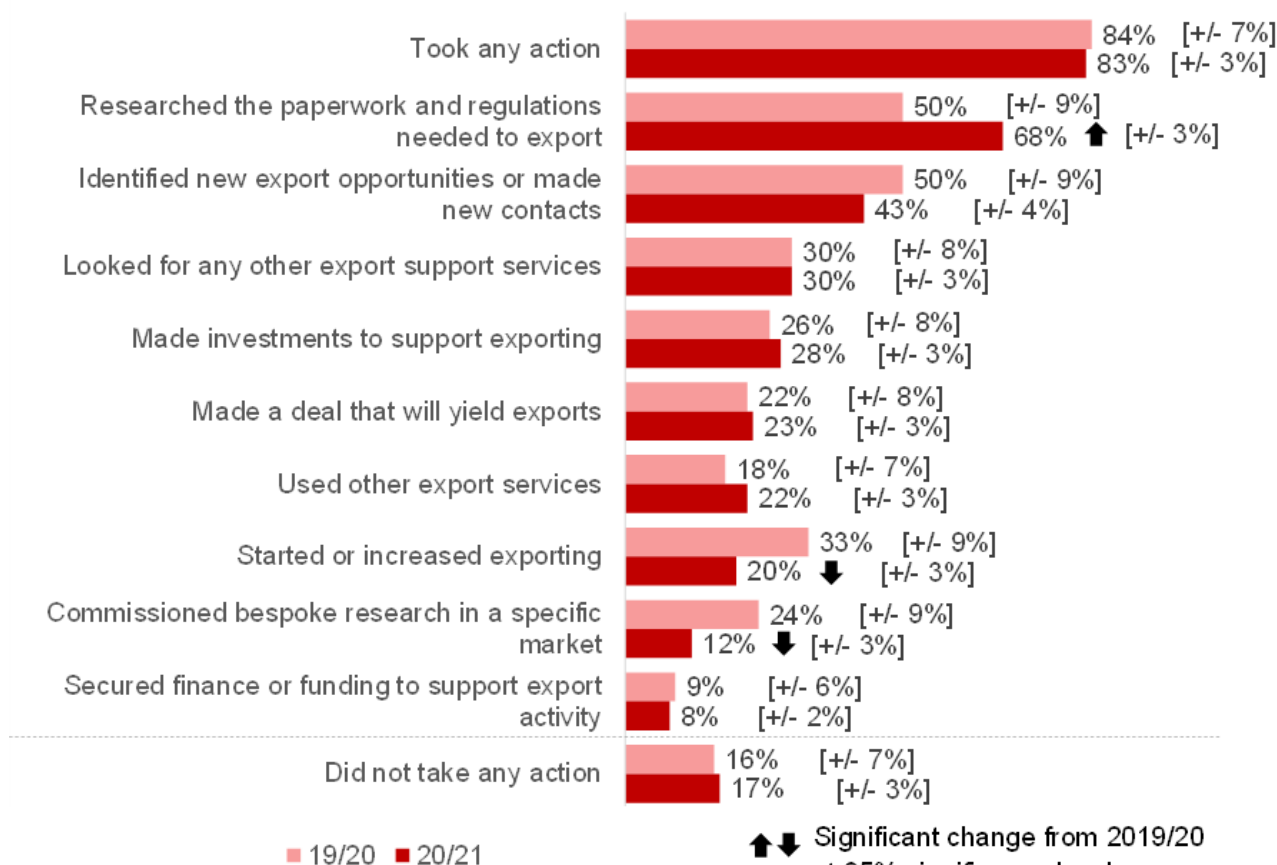
4.3.3. Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the Webinars service (Chart 4.3.3). Around two-thirds reported that they had researched the paperwork and regulations needed to export (68%), while 43% had identified new export opportunities or made new contacts. Around half of businesses (53%) that were not exporting had assessed the business' readiness to export.

Several actions were more common among businesses with a higher turnover of over £500,000, compared with those with a lower turnover: researching the paperwork and regulations needed to export (71% compared with 59%), making a deal that will yield exports (30% compared with 20%) and using other export services (27% compared with 14%). Micro businesses were also less likely than other businesses to have used other export services (17% compared with 25% of small, 27% of medium and 26% of large businesses).

Compared to the previous year, more businesses had researched the paperwork and regulations needed to export in 2020/21 (68%, up from 50% in 2019/20). Businesses were less likely to have started or increased exporting (20%, down from 33% in 2019/20) and were also less likely to have commissioned bespoke research in a specific market (12%, down from 24% in 2019/20).

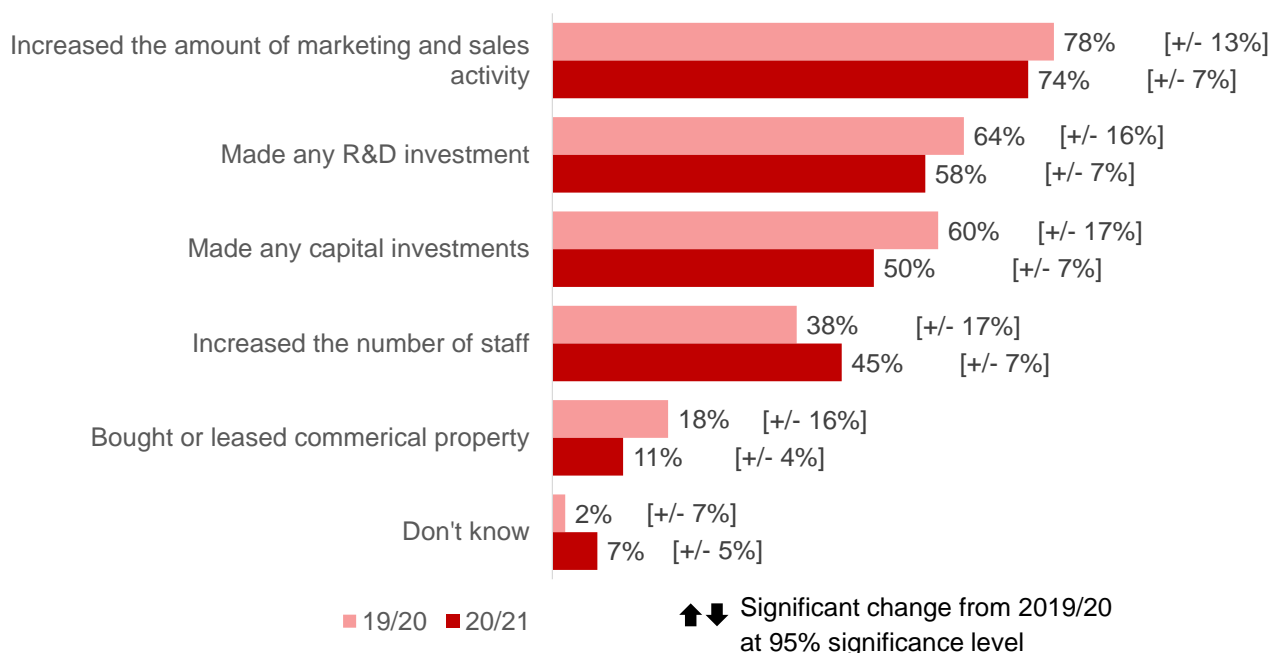
Chart 4.3.3 What the business has done as a result of receiving the service – Webinars



QResultService: What has your business done as a result of Webinars? Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20)). 'Took any action' includes non-exporters who responded 'Assessed company's readiness to export'.

Businesses that had made an investment as a result of using the Webinars service were asked what investments they had made (257 respondents). The most common answer was an increase in marketing and sales activity (74%), followed by R&D investment (58%) and capital investments (50%). These results were in line with the previous year.

Chart 4.3.4 Type of investments made to support new or increased export opportunities following using Webinars



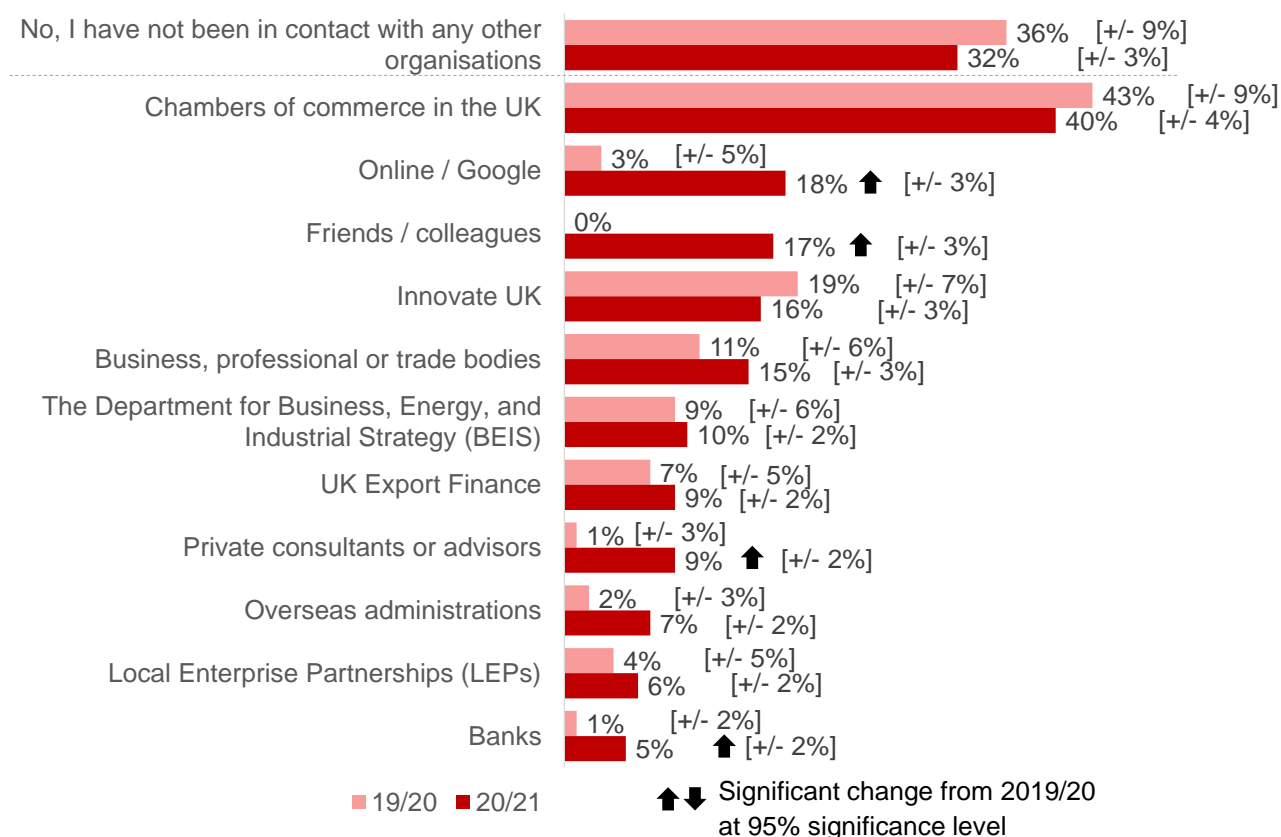
QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities?
 Base: All businesses that used Webinars and made investments to support exporting as a result of using Webinars (n=257 (2020/21), n=37 (2019/20))

Businesses were asked what organisations they had been in contact with since using Webinars. Two in five (40%) had been in contact with the British Chambers of Commerce, while around one in six had been in contact with Innovate UK (16%) or business, professional or trade bodies (15%). Similar proportions had been online (18%) or had been in contact with friends/colleagues (17%). Around a third (32%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Businesses with a turnover of £500,000 or more were more likely to have contacted the British Chambers of Commerce, than businesses with a turnover of less than £500,000 (43% compared with 30%). However, those with a lower turnover were more likely to have contacted Innovate UK (23% of businesses with a turnover of less than £500,000 compared with 15% of those with a turnover of over £500,000). Large and medium businesses were more likely to have contacted BEIS (21% and 16% respectively), compared with micro or small businesses (7% and 8% respectively).

In comparison to the 2019/20 RIS, businesses were more likely to have been online or on Google (18%, up from 3% in 2019/20), or in contact with friends/colleagues (17%, up from 0%), private consultants or advisors (9%, up from 1%) or banks (5%, up from 1%).

Chart 4.3.5 What organisations respondents have been in contact with since receiving the service – Webinars



QAnyContact: And again, since your business used [SAMPLED SERVICE] in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities? Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20)). Coded responses with 5% or more are included.

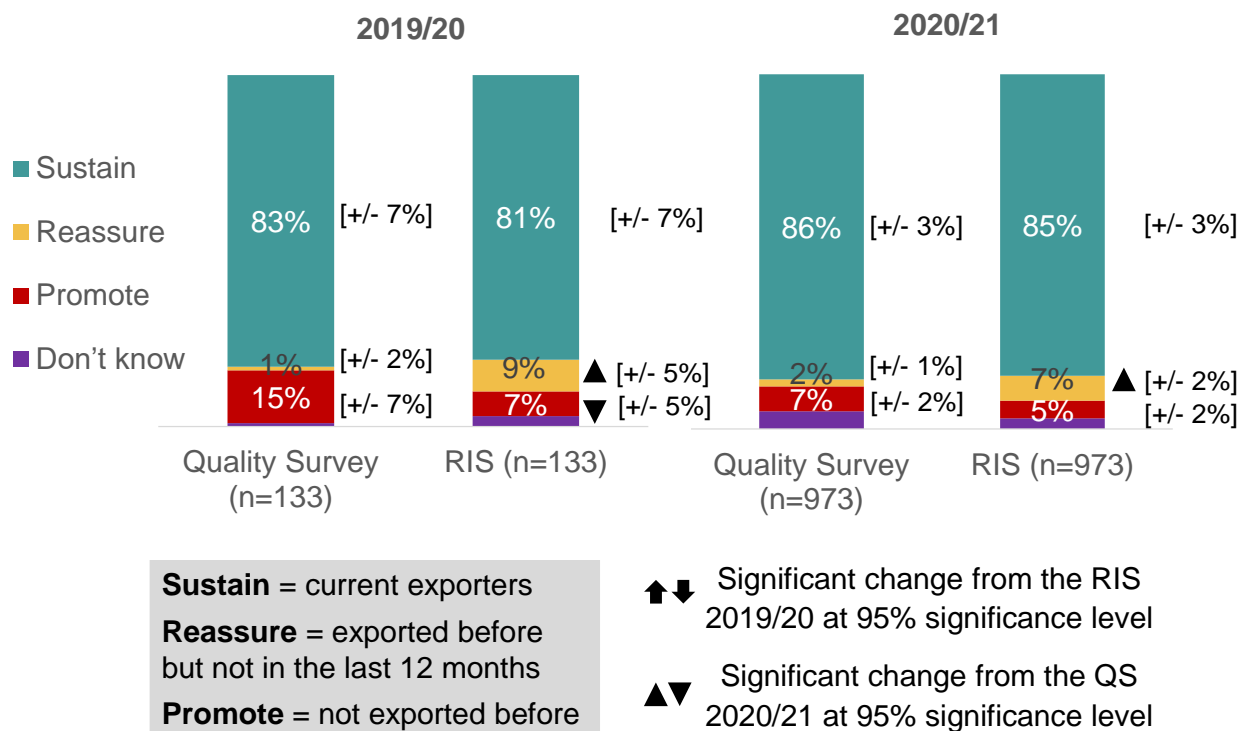
4.3.4. Reported impact on exporting

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

- Sustain:** refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Nearly nine in ten businesses (86%) that used Webinars fell into this segment at the time of the service delivery (QS 2020/21). This remained unchanged (85%) in the RIS 12 months later.
- Reassure:** refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Two per cent that used Webinars fell into this segment at the time of the service delivery (QS 2020/21), and this increased to seven per cent 12 months later.
- Promote:** refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. Seven per cent of those that used Webinars were in this segment at the time of the service delivery (QS 2020/21). This was unchanged 12 months later (five per cent).

There were no changes when comparing the results with those from the previous year (2019/20).

Chart 4.3.6 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Webinars



Source: Composite measure merging data from several variables. Base: All businesses that used Webinars and completed both surveys (Quality Survey: n=973 (2020/21), 133 (2019/20). RIS: n=973 (2020/21), 133 (2019/20))

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

Three in ten (29%) businesses from the Reassure segment moved to Sustain, five per cent of businesses in the Sustain segment moved to Reassure, and less than one per cent moved from the Sustain segment to Promote. These findings were in line with the previous year (2019/20).

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

Quality Survey Export status	RIS Export status	Percentage	Change since 2019/20
Sustain (n=859)	Sustain	93% [+/- 2%]	-
	Reassure	5% [+/- 2%]	-
	Promote	under 1% [+/- 1%]	-
Reassure (n=21*)	Sustain	29% [+/- 19%]	-
	Reassure	62% [+/- 21%]	-
	Promote	0%	-
Promote (n=60*)	Sustain	28% [+/- 11%]	-
	Reassure	10% [+/- 8%]	-
	Promote	61% [+/- 12%]	-

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

4.3.5. Reported export contracts achieved since receiving the service

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

Of the 85% of businesses that had exported, three-quarters (74%) reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service. This is in line with the RIS 2019/20 (72%).

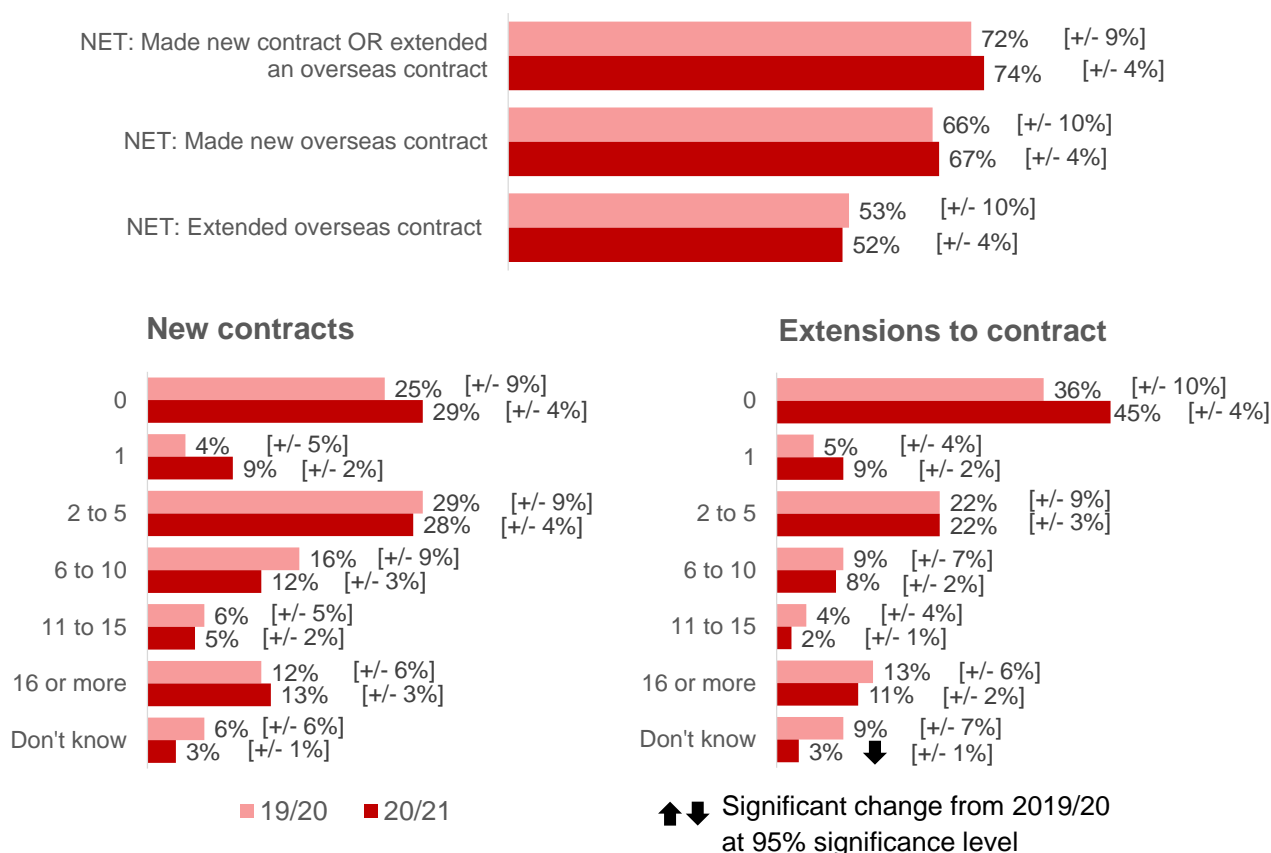
Two-thirds (67%) of these exporting businesses had won new overseas business contracts in the year since they used the service (Chart 4.3.7). Specifically, nine per cent had won one overseas contract, and around a quarter (28%) had won between two and five overseas contracts. Around one in eight (13%) businesses had won 16 or more overseas contracts (Chart 4.3.7). The median number of contracts won among exporting businesses that had used Webinars was three²⁷.

Around half (52%) of exporting businesses that used Webinars reported they had gained extensions to existing overseas business contracts in the year since they used the service. Nine per cent extended one contract, and around one in five (22%) extended between two and five contracts. Around one in ten (11%) extended 16 or more existing overseas sales contracts. Almost half (45%) of businesses had not extended any existing contracts (Chart 4.3.7). The median number of contracts extended (including those that did not extend any) was zero.

Businesses with a turnover of £500,000 or more were more likely to have won new overseas business contracts (72% compared with 61% of those with a turnover of less than £500,000) and to have gained extensions to existing overseas business contracts (56% compared with 46%).

²⁷ This is taken from the 90% that exported and could also provide a figure for the number of contracts won. It includes those that export but did not win any new contracts in the 12 months since they used the service.

Chart 4.3.7 Proportion of businesses that exported and reported they had made new overseas contracts and / or extended existing contracts, and number of contracts made in previous 12 months – Webinars²⁸



Q_Newcontract: Firstly, how many new overseas business contracts for export sales did you win in the past year?

Q_Extendcontract: And how many extensions to existing overseas business contracts for export sales did you win in the past year?

Base: All businesses that used Webinars and were currently selling, or had previously sold, goods or services overseas in the previous 12 months (n=838 (2020/21), n=109 (2019/20))

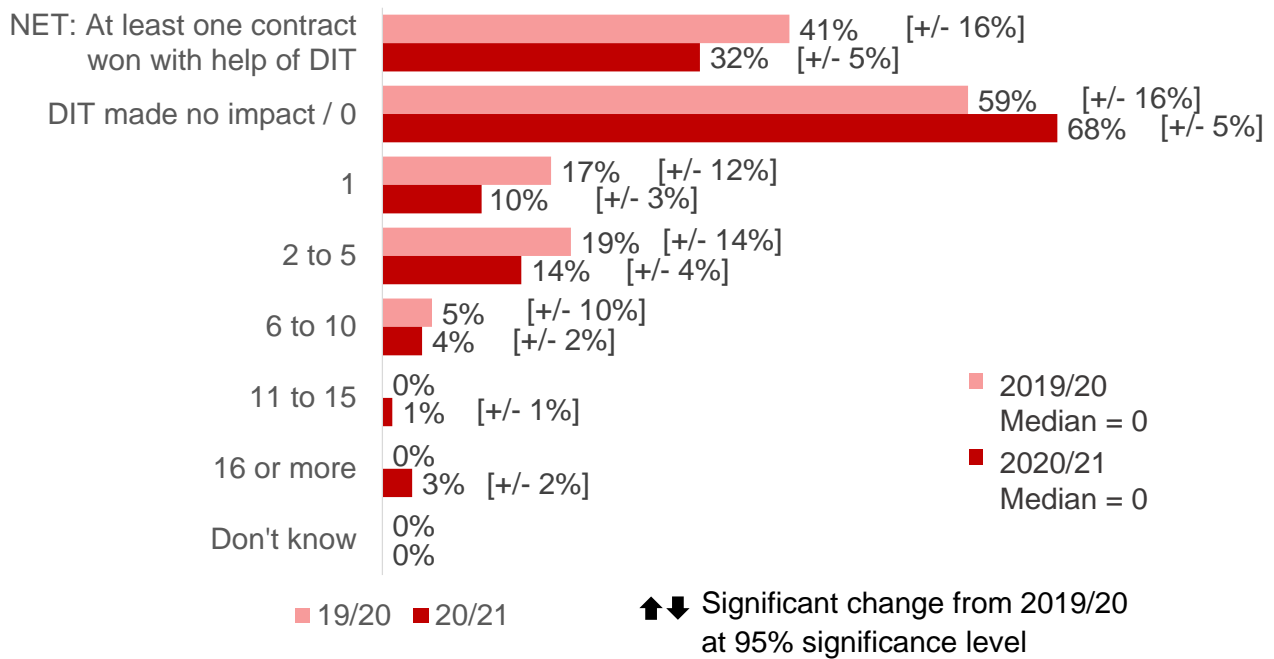
Reported additional contracts which were gained because of DIT support

Businesses that exported and that had won at least one new contract in the 12 months since the delivery of the Webinars service were asked whether they could estimate the number of contracts won with the assistance of Webinars or DIT. In total, 188 businesses (that is 19% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.3.8 below, around two-thirds of these businesses (68%) said they won no new overseas sales contracts with the help of DIT, or using DIT services made no impact. One in ten (10%) had won one new overseas contract, and one in seven (14%) had won between two and five contracts. The median number of contracts that DIT helped win was zero, for current exporters that used Webinars. This was in line with the previous year (2019/20 RIS).

²⁸ The total percentage of all responses for this question may not sum to 100 per cent due to rounding.

Chart 4.3.8 Number of new overseas contracts said to be won with the help of DIT in the last 12 months (including those who said DIT made no impact) – Webinars



Q_ContractDIT: Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT

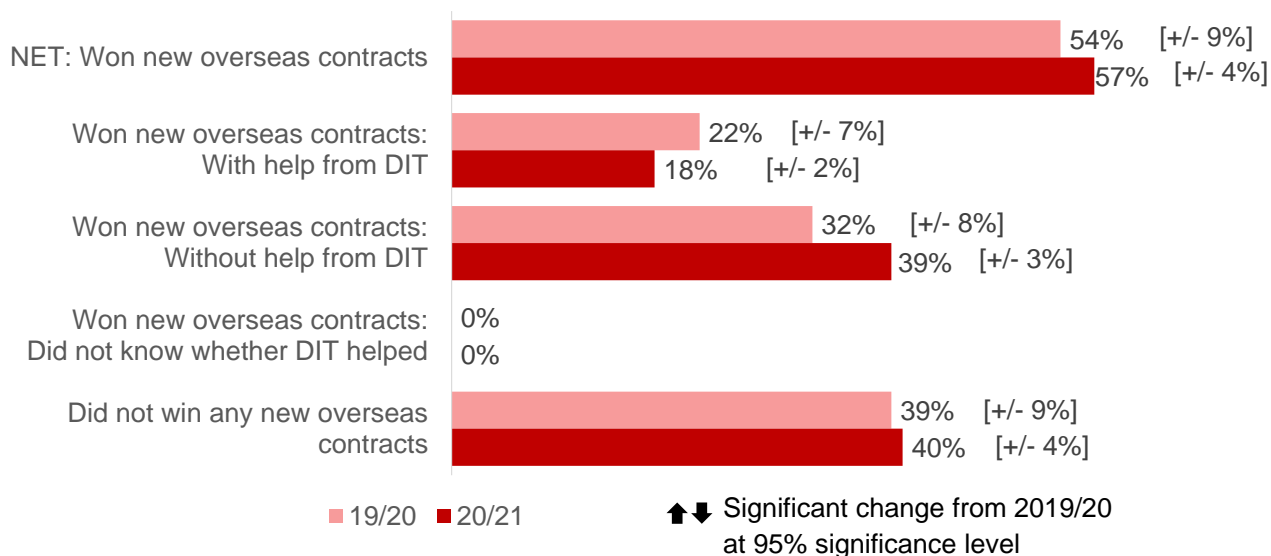
Q_ContractNumber: How many new overseas contracts were won with help from DIT

Base: All businesses that used Webinars and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=418 (2020/21), n=42 (2019/20)). Median values include zero.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DIT. Among all businesses that had used Webinars, 57% said they had won new overseas contracts (either with help from DIT, without help from DIT, or were unsure whether DIT helped). More specifically, we estimate that 18% of Webinars respondents had won contracts with help from DIT, while 39% of Webinars respondents said they had won contracts without help from DIT. This is in line with the previous year²⁹.

²⁹ Please refer to the annex and survey technical report for a more detailed explanation of this measure.

Chart 4.3.9 Proportion of businesses reported to have won or not won new overseas contracts, and the proportion of businesses estimated to have won new overseas contracts with or without DIT support – Webinars



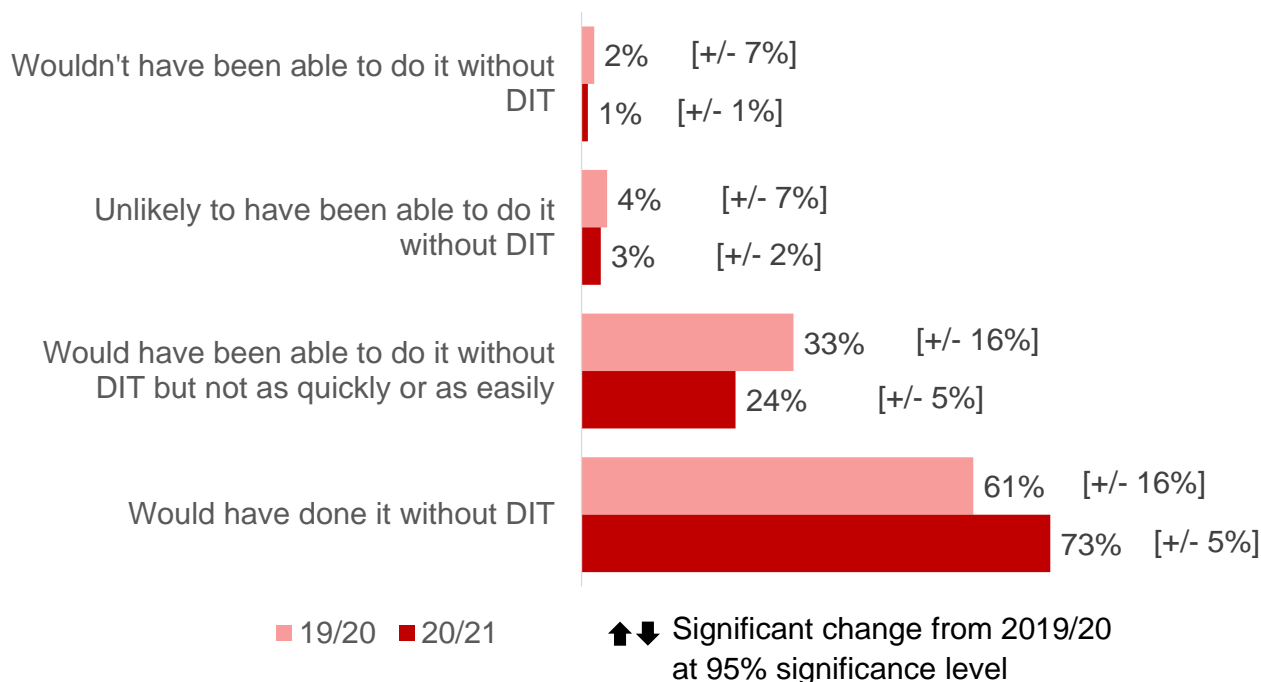
Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

Importance of DIT’s support in winning overseas contracts

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

Around a quarter of these businesses (27%) reported that DIT support was important in helping them win these contracts to some extent. One per cent of those who won at least one new overseas contract said they would not have been able to do it without DIT, while three per cent thought it was unlikely they could have done it without DIT. A quarter (24%) thought they would not have been able to do it as quickly or easily without DIT support (Chart 4.3.10). The remaining 73% thought they would have been able to achieve the same outcome without DIT support. These results are in line with the previous year.

Chart 4.3.10 How important DIT's help was in winning overseas contracts – Webinars



QcontractHelp: How important was DIT's help in winning these overseas contracts

Base: All businesses that used Webinars and won any new overseas contracts in the past year (n=418 (2020/21), n=42 (2019/20) a small base size)

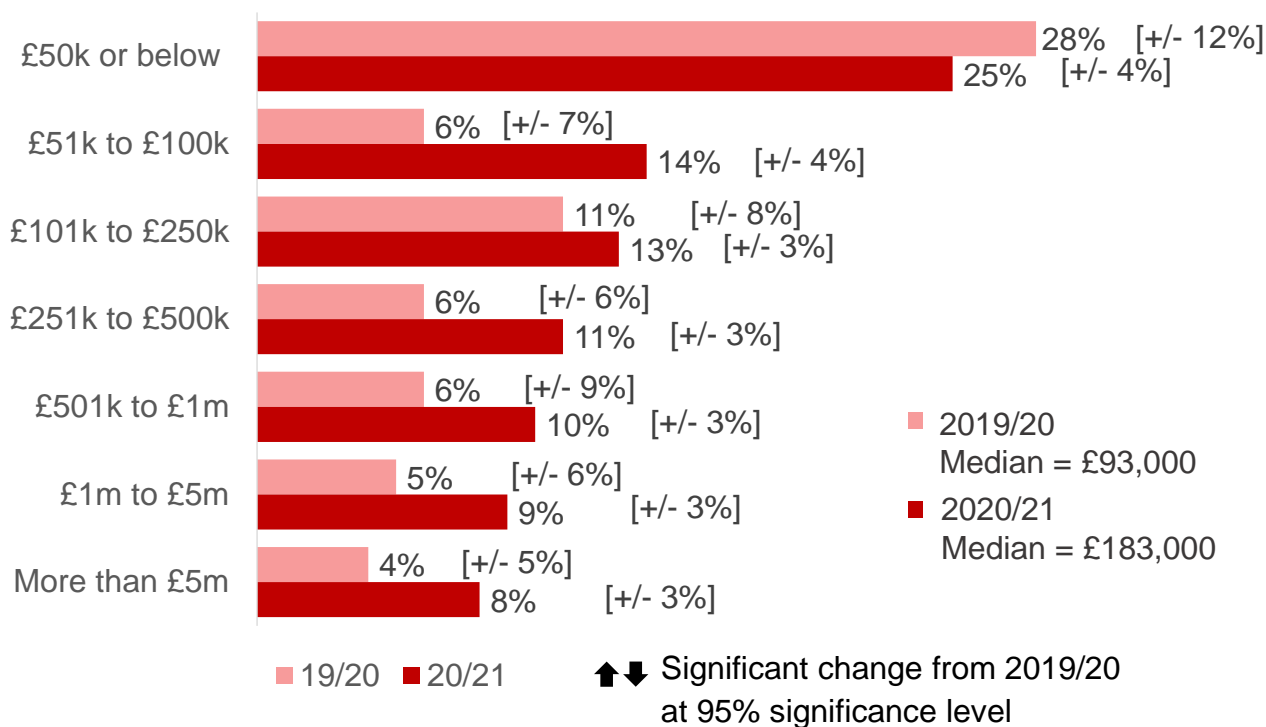
4.3.6. Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 57% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts, in total (Chart 4.3.11). The median value of the export sales of all new overseas contracts for these businesses was £183,000 (compared to £93,000 in RIS 2019/20). One in four (25%) had won contracts with an export sales value of £50,000 or below. One in six (16%) said that the export sales value of the new overseas contracts won was more than £1 million.

These results are in line with the previous year.

Chart 4.3.11 Value of all new overseas contracts made in previous 12 months – Webinars



QcontractValue: What is the value of all these new overseas business contracts for export sales?

Base: All businesses that used Webinars and won any new overseas business contracts (n=556 (2020/21), n=72 (2019/20) a small base size)

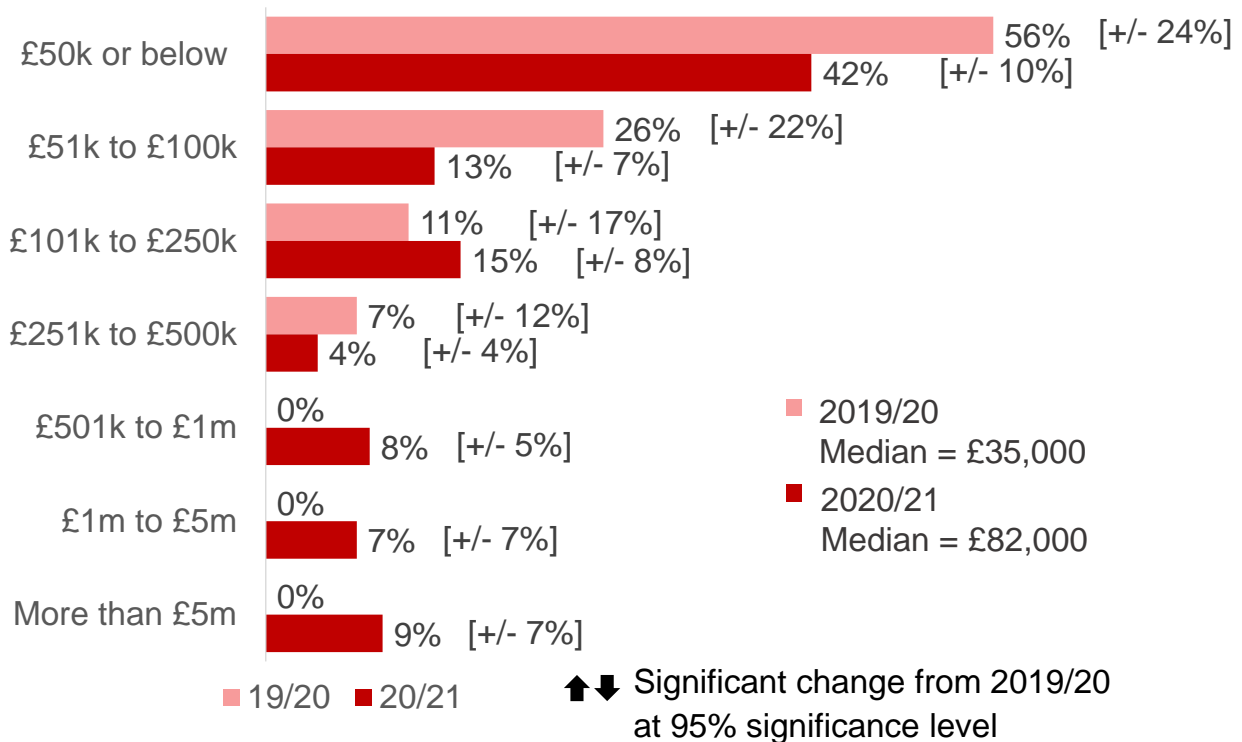
Reported additional value of DIT support

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

Businesses were asked to estimate the value of new overseas business contracts that they had won with DIT support. This data was used to estimate the 'reported additional export sales' – that is, the reported additional impact of using DIT services on export sales. The reported additional export sales for Webinars was £82,000, across all the contracts that Webinars helped businesses to win (compared to £35,000 in RIS 2019/20). Note that this does not include businesses that did not win any new export contracts, or businesses that said DIT made no impact on overseas contract wins.

Around two in five businesses (42%) reported additional export sales of £50,000 or below, and 13% reported additional new export sales of between £51,000 and £100,000. Some businesses had exceptionally large value added by DIT support; one in six (16%) won overseas sales contracts with the help of DIT support worth more than £1 million (Chart 4.3.12). These results are in line with the previous year.

Chart 4.3.12 Value of new overseas contracts helped by DIT support in previous 12 months – Webinars



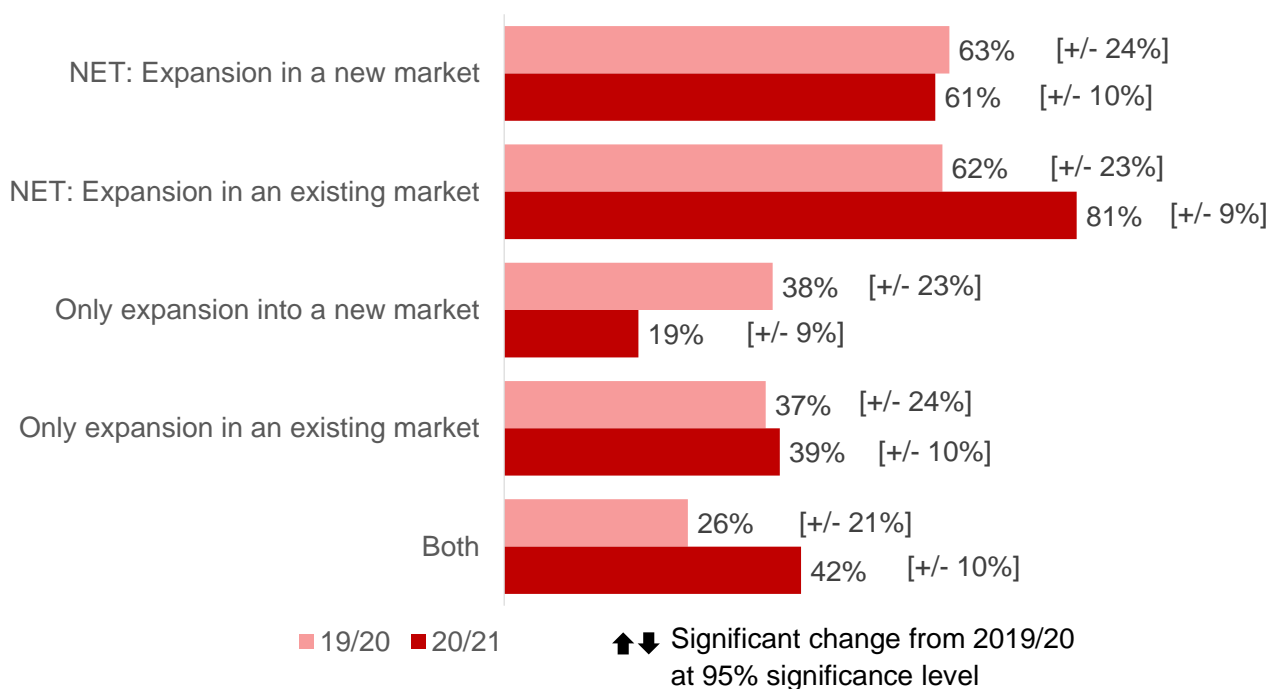
QContractValueDIT: What was the value of these new overseas business contracts that your business won with the help of Webinars/DIT support last year?

Base: All businesses that used Webinars and won any new overseas business contracts with the help of DIT (n=130 (2020/21), n=17 (2019/20) a very small base size)

4.3.7. Recorded exposure and growth within new markets

Businesses were asked whether new contracts they had won represented expansion into a new market, expansion within an existing market, or both. This question was asked to businesses that said DIT support helped them to win new overseas contracts and were able to provide details of the number and value of these contracts. Three in five (61%) businesses said they were assisted with expansion into a new market and four in five (81%) said they were assisted with expansion within an existing market. This includes 19% who said that DIT helped them expand into new markets (but not existing markets), and 39% expanded within an existing market (but not into new markets). Around two in five (42%) reported that DIT helped them expand into both existing and new markets. These results are in line with the previous year.

Chart 4.3.13 Whether new contracts won with DIT's help represented expansion into new markets or existing markets – Webinars



QcontractRepresent: And did these new overseas contracts represent...?

Base: All businesses that used Webinars and won any new overseas business contracts with the help of DIT (n=129 (2020/21), n=17 (2019/20) a very small base size)

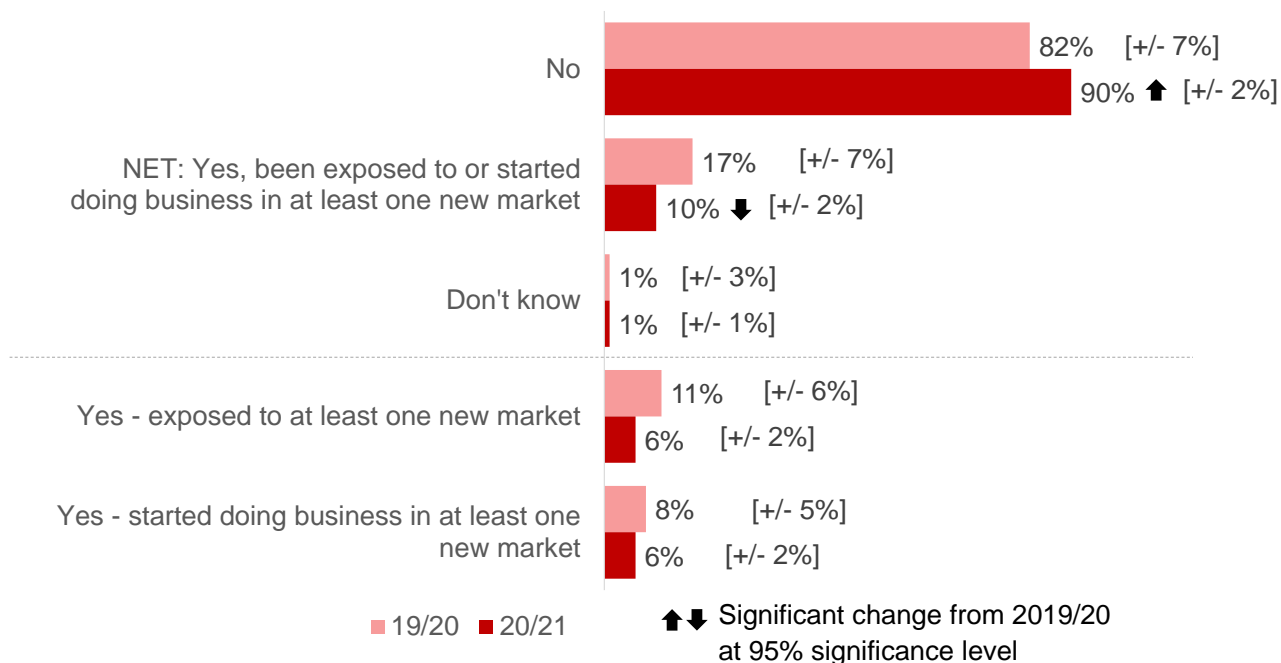
All businesses that used Webinars were asked whether they had increased their exposure or started doing business in any new markets because of using the Webinars service³⁰. The same proportions of businesses said they had been exposed to at least one new market (6%) or had started doing business in at least one new market (6%) as a result of using the Webinars service.

Businesses with a turnover of less than £500,000 were more likely to say they had been exposed to at least one new market, compared with those with a turnover of £500,000 or more (9% compared with 4%).

Compared to the 2019/20 RIS, businesses were less likely to say they had either been exposed to or had started doing business in at least one new market (10% compared to 17% in 2019/20).

³⁰ Respondents could select both if they had been exposed to at least one new market and if they had started doing business in at least one new market.

Chart 4.3.14 Whether increased exposure or starting business in a new overseas market – Webinars



QGrowthDIT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
 Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

4.3.8. Barriers to exporting

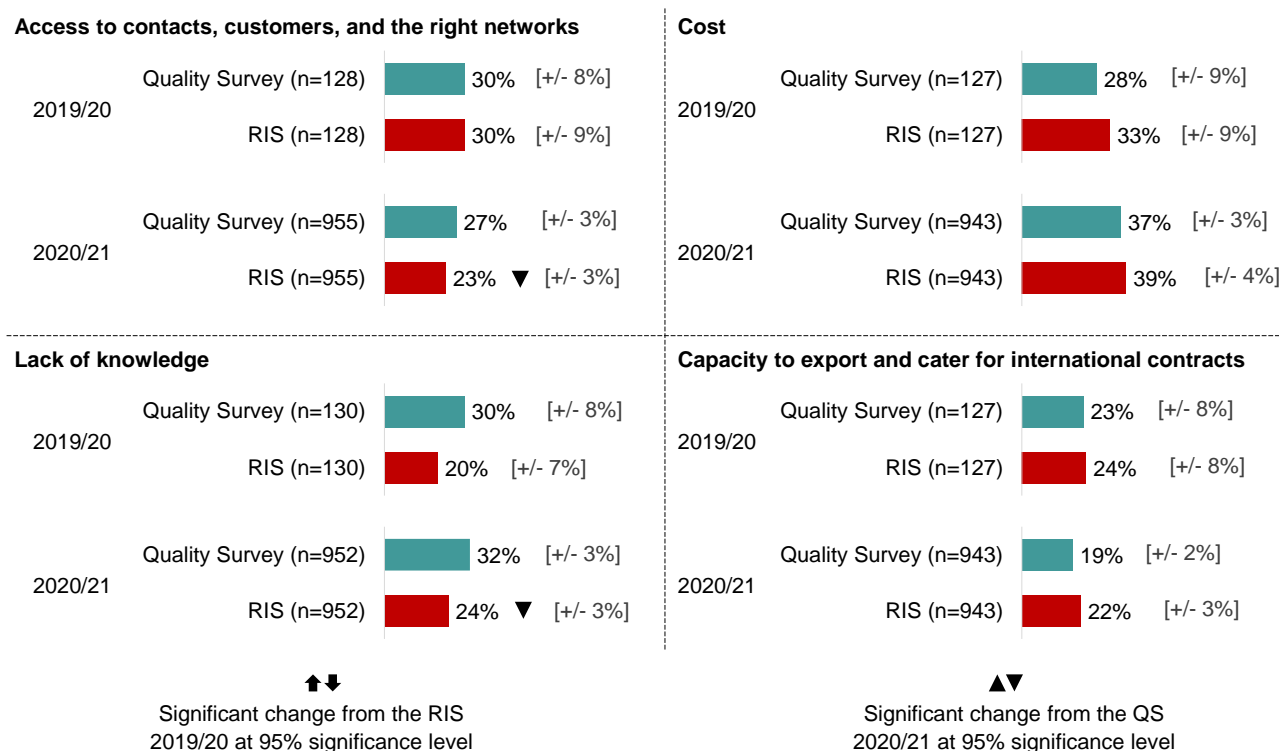
Businesses were asked in both the QS and RIS about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)³¹.

The top barrier in RIS 2020/21 was 'cost' (39%), followed by 'lack of knowledge' (24%) and 'access to contacts' (23%). Micro businesses were more likely to report all four barriers than larger businesses: 'access to contacts' (30% compared with 18% of other businesses), 'capacity' (26% compared with 18%), 'lack of knowledge' (28% compared with 20%) and 'cost' (45% compared with 34%). Linked to this, businesses with a turnover of less than £500,000 were more likely to report two of the barriers, compared with those with a turnover of £500,000 or more: 'capacity' (29% compared with 19%) and 'access to contacts' (32% compared with 21%).

Compared to these businesses' responses in the QS 2020/21, businesses were less likely to report 'access to contacts' (23%, down from 27% in QS 2020/21) and 'lack of knowledge' (24%, down from 32% in QS 2020/21) as barriers. There were no differences when comparing results to the 2019/20 RIS.

³¹ This section compares results for businesses who completed both surveys and provided a response to this question in both surveys. Businesses that said a barrier was not applicable in either survey were excluded.

Chart 4.3.15 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Webinars³²



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

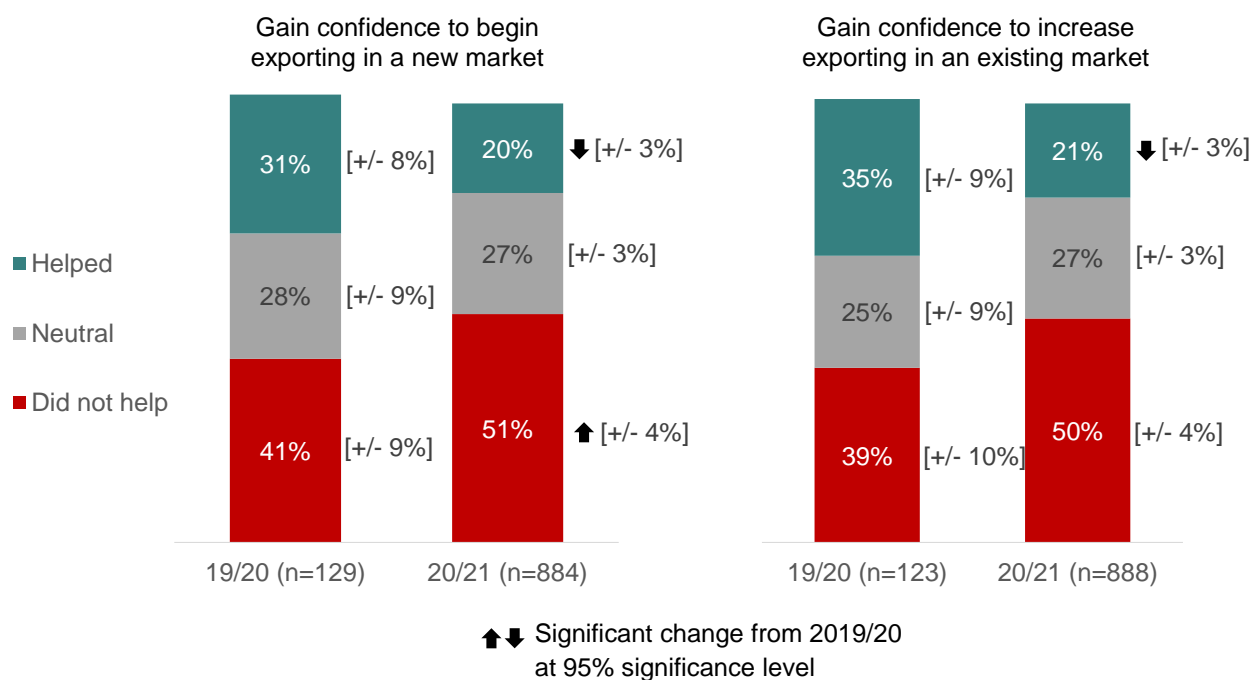
4.3.9. Wider benefits of the service

Businesses were asked to think about the extent to which using the Webinars service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market. More businesses reported that using the Webinars service had not given them confidence to begin exporting in a new market (51%) or to increase exporting in an existing market (50%), than did. One in five (20%) reported that using the Webinars service had given them confidence to begin exporting in a new market, and a similar proportion (21%) reported that it had given them confidence to increase exporting in an existing market.

Compared to the previous year, fewer businesses reported that using the Webinars service boosted their confidence in exporting in a new market (20% compared to 31% in 2019/20) or in increasing exporting in an existing market (21% compared to 35% in 2019/20).

³² The percentages shown in this chart are for businesses that rated a factor as 7-10 out of 10 when asked how much of a barrier it is.

Chart 4.3.16 To what extent using the Webinars service helped to build confidence to export



QgainConfidence: On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of Webinars help you to...? Helped (7-10), Neutral (4-6), Did not help (0-3). Base: All businesses that used Webinars not including those who gave a 'not applicable' answer.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**³³. Chart 4.3.17 below shows how businesses rated the impact of using the Webinars service on their knowledge.

On balance, more businesses reported that using the Webinars service was **helpful for increasing their knowledge of support available to them (from DIT and elsewhere)**. A third (34%) said the service helped to do this, and three in ten (30%) said it did not help them do this. These findings were in line with the previous year (2019/20).

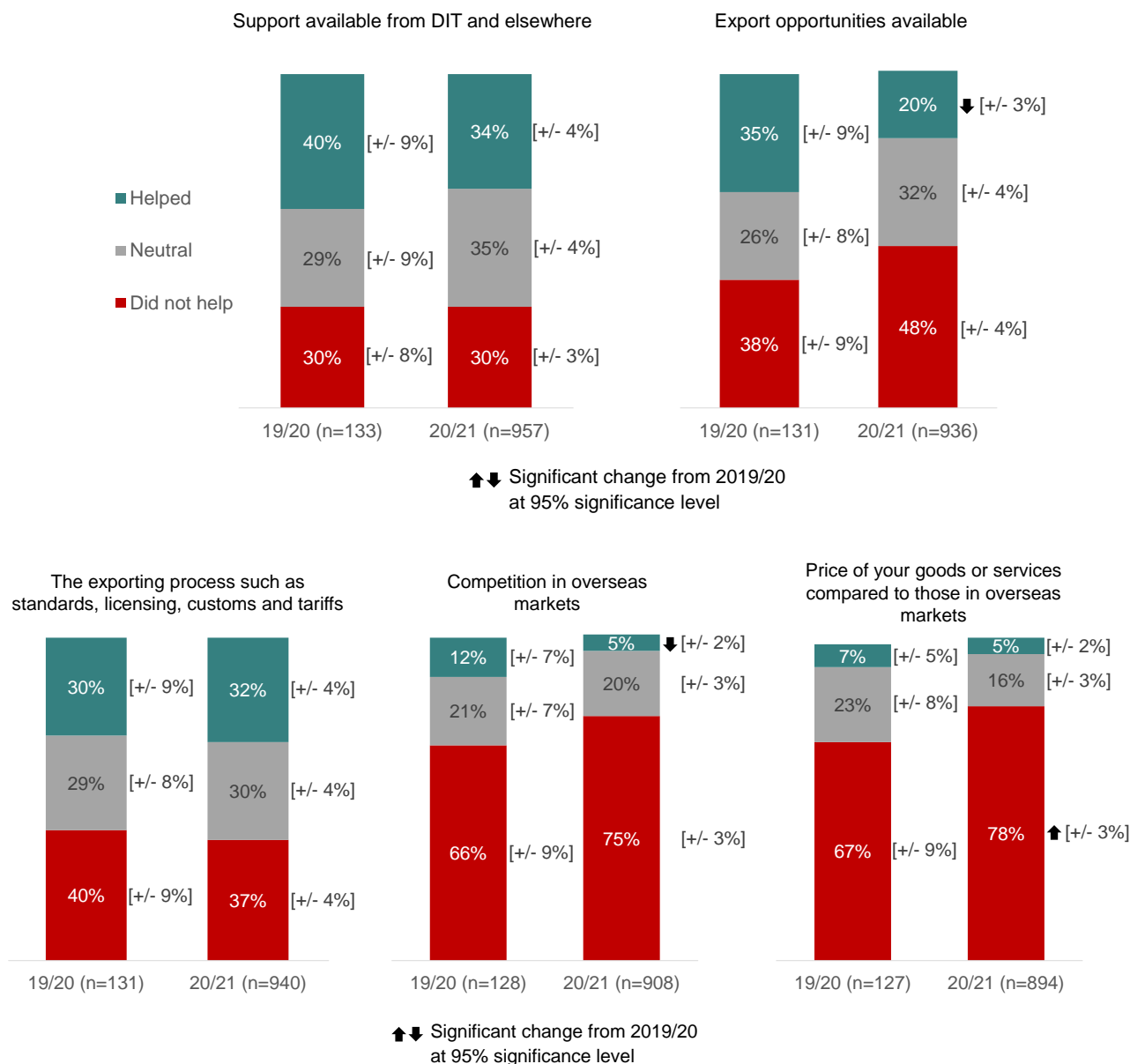
However, more businesses on balance reported that using the Webinars service was **not helpful for increasing their knowledge of export opportunities available or improving their knowledge of the exporting process**. One in five businesses that had used Webinars (20%) said the service had helped them to increase their knowledge of the export opportunities available (down from 35% in 2019/20). Around half (48%) said they were not helped in this way. Over a third (37%) of businesses said that the service did **not help to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs, and a third (32%) of businesses that had used Webinars said the service did help them in this way. These findings were in line with the previous year (2019/20).

Only small proportions said that using Webinars improved their **knowledge of the price of goods** compared with those in overseas markets (5%) or about their **competitors in overseas markets** (5%). In comparison to the 2019/20 RIS, there was a decline in the proportion that said using Webinars improved their knowledge about their competitors in overseas markets (5%, down from 12% in 2019/20).

³³ Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

Businesses with a turnover of less than £500,000 were more likely than those with a turnover of £500,000 or more to say that the Webinars service had helped them to increase their knowledge of support available to them from DIT and elsewhere (39% compared with 30%).

Chart 4.3.17 To what extent the business felt that their knowledge has improved as a result of using the service – Webinars



QimproveKnowledge – Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of [Sampled Service]? Helped (7-10), Neutral (4-6), Did not help (0-3). Base: All businesses that used Webinars not including those who gave a 'not applicable' answer.

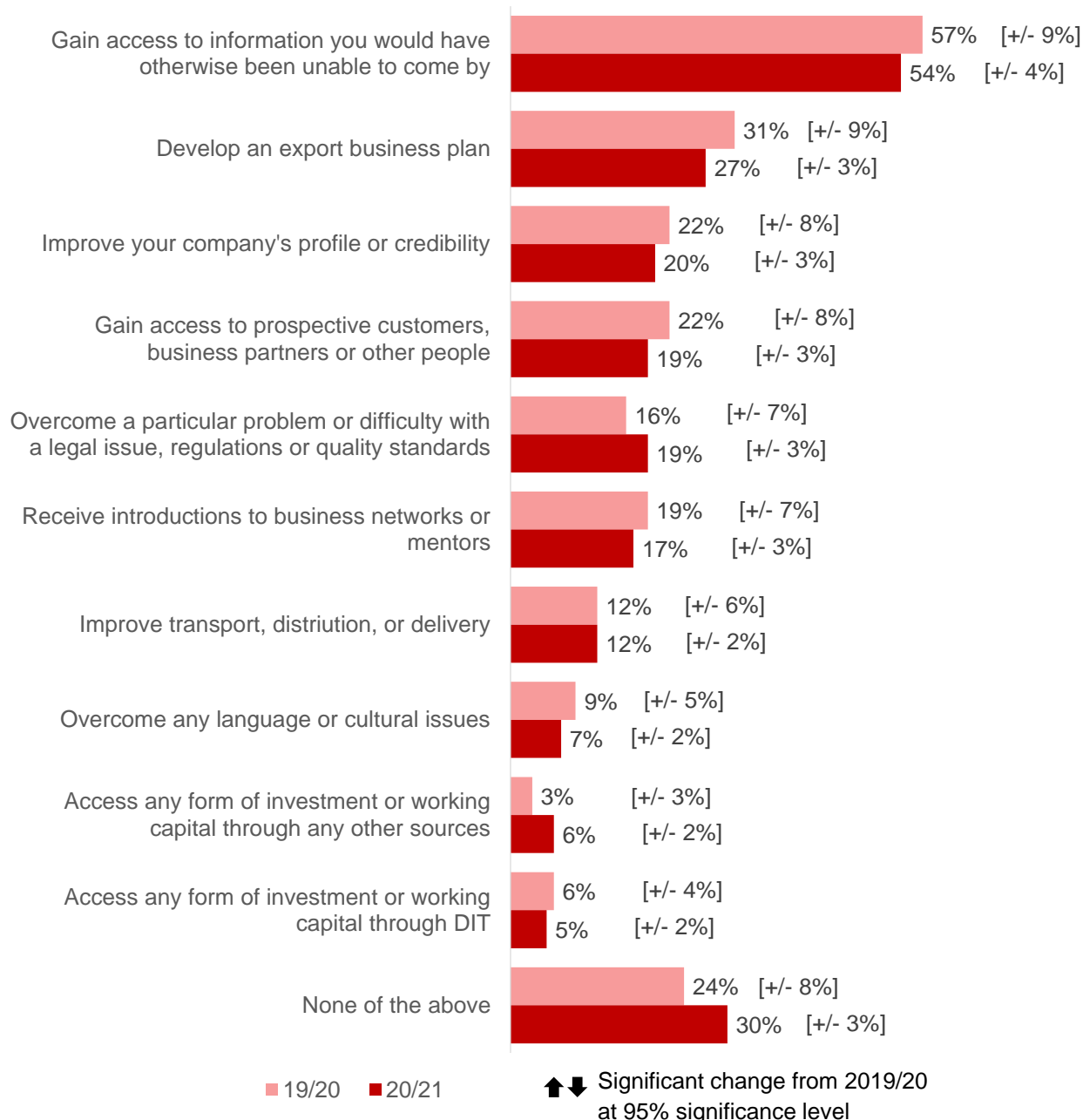
Businesses were asked about other ways they had benefitted from using Webinars in the year between using Webinars and taking part in the RIS.³⁴ A detailed breakdown of responses is shown in Chart 4.3.19.

³⁴ Respondents were asked to select from a pre-coded list and had the option to provide an 'other' answer

The top responses were helping businesses to gain access to information that they would otherwise have been unable to come by (54%) and developing an export business plan (27%). Three in ten (30%) felt that using the Webinars service had not helped them in any of the ways listed.

These results are in line with the previous year.

Chart 4.3.18 In what ways has the business felt it had benefited from DIT support – Webinars



QserviceBenefit: in which of the following ways if any, has your business benefited specifically from Webinars over the last year? Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

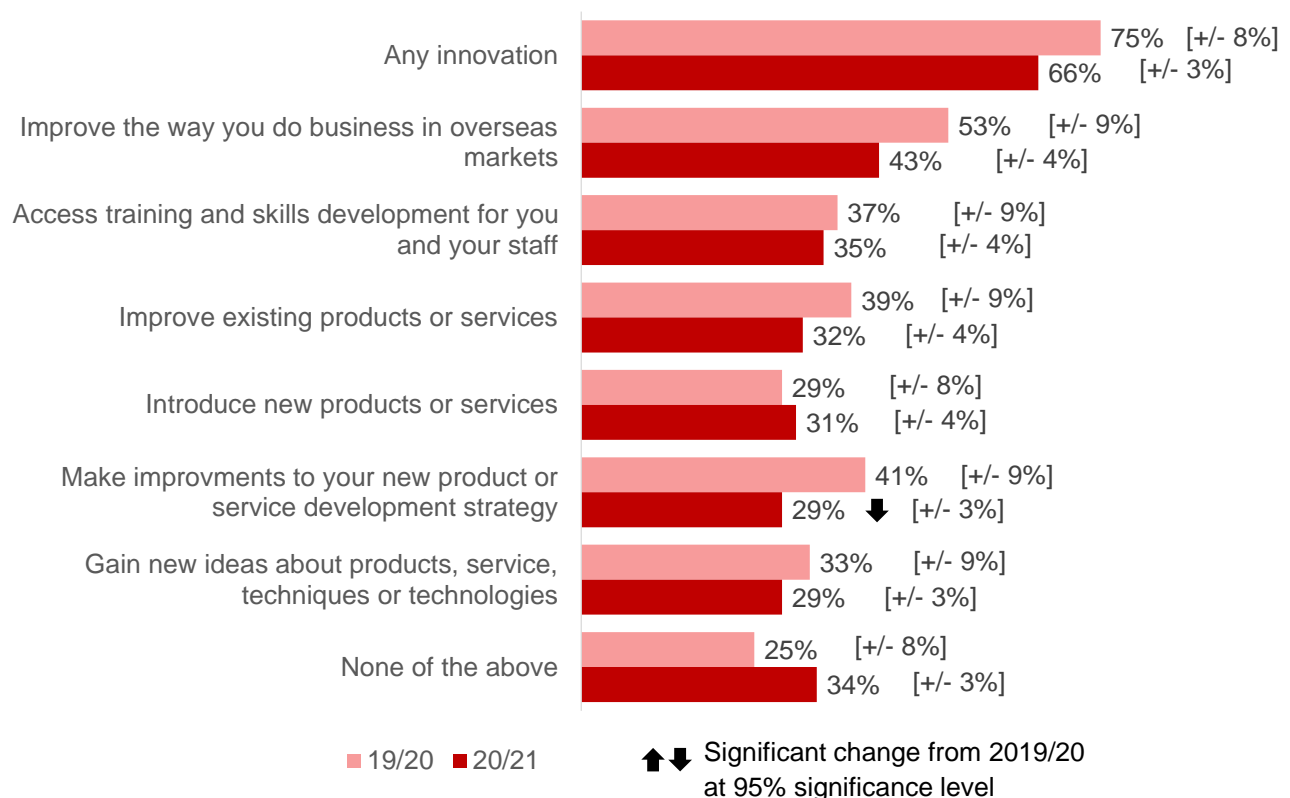
Businesses were asked whether using the Webinars service had helped, or was likely to help, support innovation and/or development in their business. Two-thirds (66%) said that using the service helped them, or would help them, with innovation or development in some form. The most

frequent responses were to improve the way they do business overseas (43%) or to access training and skills for themselves or their staff (35%).

Businesses with a turnover of less than £500,000 were more likely than those with a turnover of £500,000 or more to report several benefits: introducing new products or services (42% compared with 28%), improving existing products or services (37% compared with 28%), gaining new ideas about products, services, techniques or technologies (36% compared with 25%) and making improvements to new product or service development strategy (38% compared with 25%).

Compared to the 2019/20 RIS, businesses were less likely to say that using the service had led to improvements to their new product or service development strategy (29%, down from 41% in 2019/20).

Chart 4.3.19 Whether the service has / is likely to help innovation and development – Webinars



QinnovationSupport: Still thinking of Webinars, has this service helped or do you expect it to help your business with development and/or innovation? Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

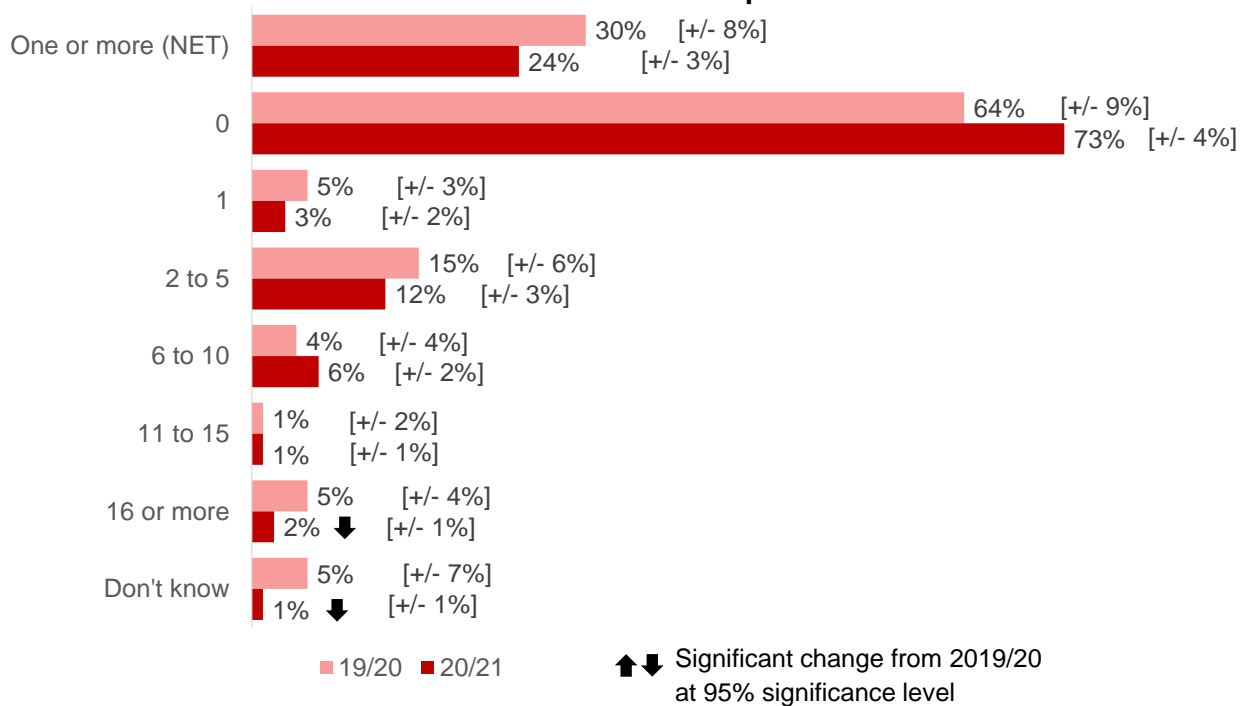
International contacts

Businesses were asked how many overseas contacts they had made as a result of using Webinars over the past year (Chart 4.3.20). A quarter (24%) of businesses made at least one new overseas contact in the year since using the Webinars service, with 12% making between two and five new contacts. Around three-quarters (73%) of businesses reported that they had not made any new contacts as a result of using the Webinars service.

Compared to the 2019/20 RIS, businesses were less likely to have made 16 or more new contacts as a result of using the Webinars service (2%, down from 5% in 2019/20).

The average number of contacts made was one, similar to the average in the 2019/20 RIS (two).

Chart 4.3.20 Number of new overseas contacts made in previous 12 months – Webinars

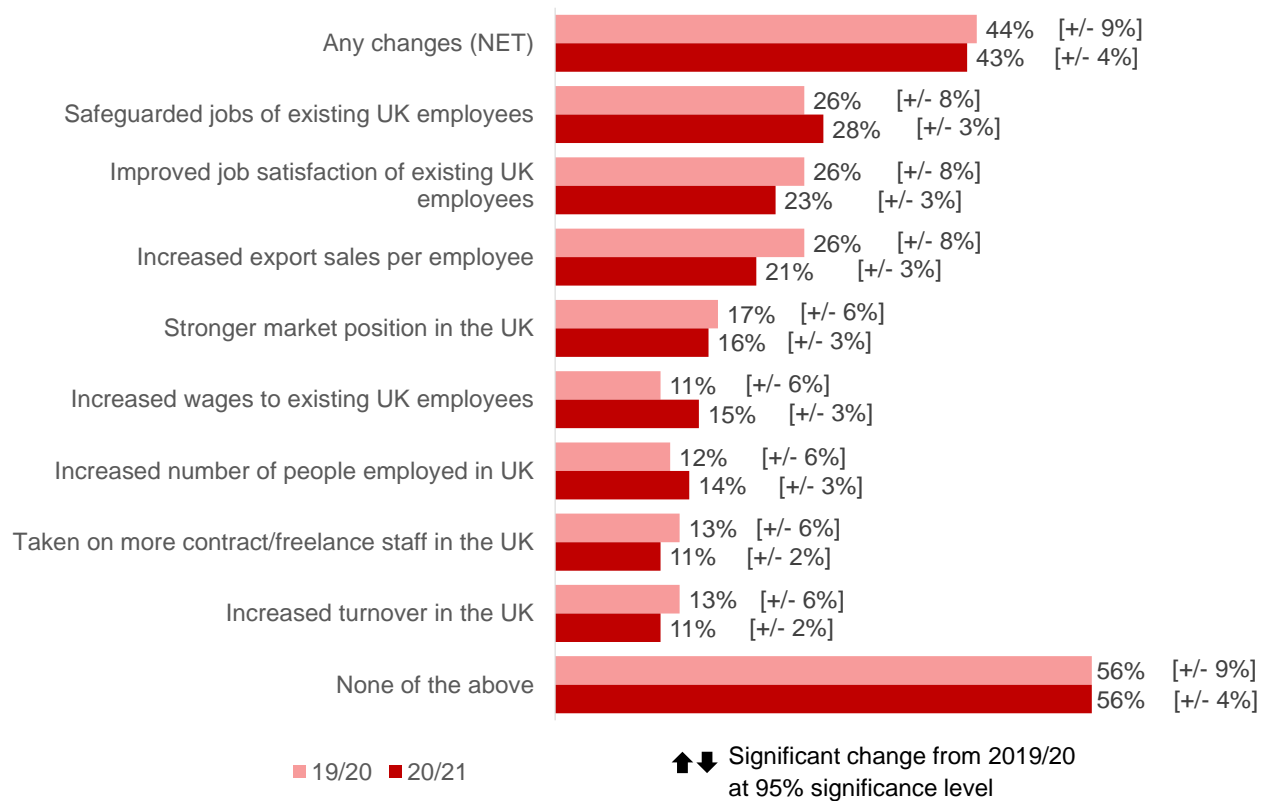


Q_ContactsMade: How many new overseas contracts, if any, did your business make as a result of [SAMPLED SERVICE] in the past year? Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Webinars service. They were most likely to say that using the Webinars service had, or would, safeguard jobs in the UK (28%), improve job satisfaction among existing UK employees (23%) or increase export sales per employee (21%).

These results are in line with the previous year.

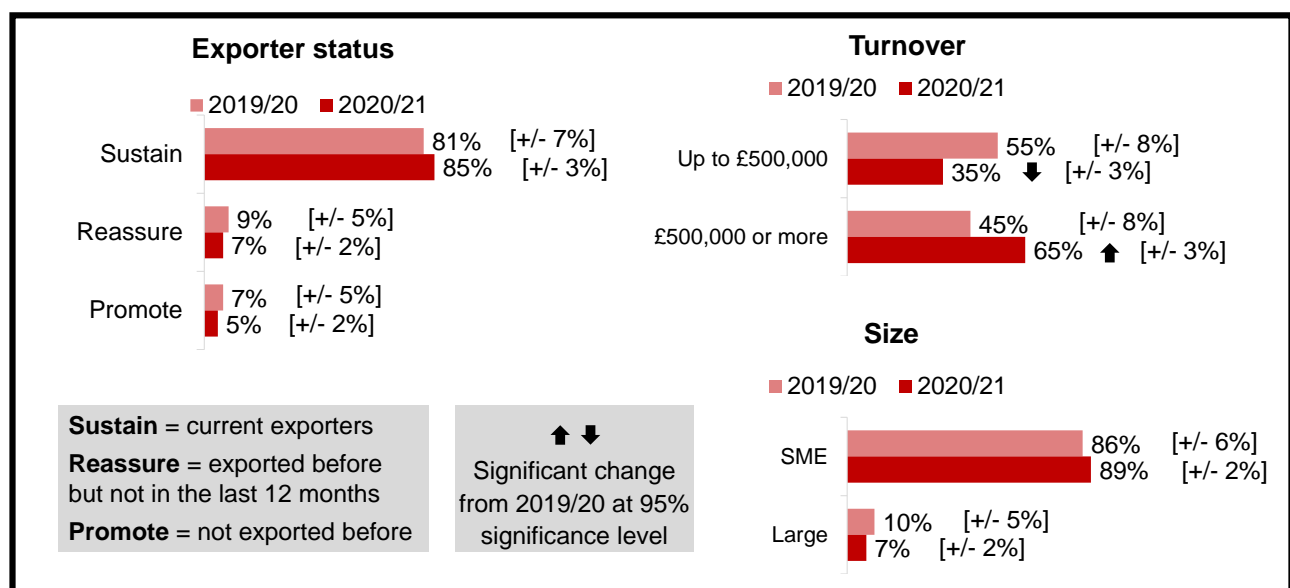
Chart 4.3.21 Changes expected / seen in the UK business as a result of receiving the service – Webinars



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of [SAMPLED SERVICE]?
 Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

4.3.10. Profile of respondents

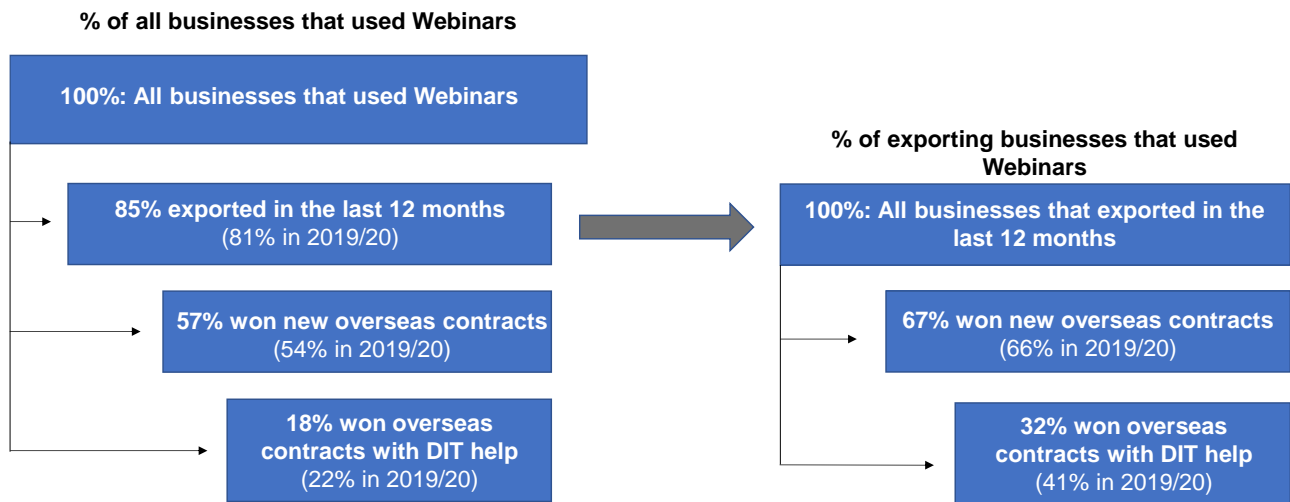
Chart 4.3.22 Profile of RIS Respondents – Webinars



Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

Looking at all businesses that used Webinars interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the impact survey), more than four in five (85%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. The size profile of the businesses supported by Webinars in the survey remained in line with the previous year. However, there was a change in the turnover profile, with an increase in the proportion of businesses with a turnover of £500,000 or more (from 45% in 2019/20 to 65% in 2020/21)³⁵.

Chart 4.3.23 Summary of businesses supported by Webinars



Median value of export sales won per business with DIT support: **£82,000** (£35,000 in 2019/20)

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

Base: All businesses that used Webinars (n=973 (2020/21), n=133 (2019/20))

³⁵ There was a higher proportion of 'Don't know' and 'Refused' responses in the Quality Survey 2020/21 for turnover. 'Don't know' and 'Refused' responses have therefore been removed from Turnover to maximise comparability.

4.4. Export Opportunities

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

This chapter explores the impact of using the Export Opportunities service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 122 businesses that used Export Opportunities between April 2020 and March 2021 and participated in both the QS and RIS.

4.4.1. Summary of reported impact as a result of Export Opportunities support (from RIS)

Actions taken as a result of using Export Opportunities

Following their use of the Export Opportunities service, nearly three in five businesses had identified new export opportunities or made new contacts (57%), while half had researched the paperwork and regulations needed to export (51%). Among non-exporters, seven in ten (70%) businesses had assessed their readiness to export after using Export Opportunities.

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was in line with the previous year (83% compared to 76% in 2019/20), and also in line with the QS 2020/21 (83% compared to 77%). Over half (54%) of businesses classified as 'Promote' (i.e. never exported before) in the QS 2020/21 had shifted to 'Sustain' in the RIS 2020/21.

Impact on winning contracts

Of the businesses that exported, more than eight in ten (85%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Export Opportunities service.

Overall, two-thirds of businesses (66%) won a new overseas contract, including 19% who said this was with Export Opportunities or DIT assistance. Among businesses that reported DIT support was important in helping them win these contracts, eight per cent said they would have been unlikely to be able to do this without DIT. These findings were in line with the previous year.

Impact on exposure and growth

One in six businesses (17%) reported being exposed to or starting to do business in at least one new market. These findings were in line with the previous year.

Impact on contacts and networks

Almost half of businesses (44%) made at least one new overseas contact after using Export Opportunities (three contacts on average), although 55% reported that DIT support did not make any difference to making exporting contacts. The average number of new overseas contacts made in the past year was 2.77, which was an increase from the average of 1.57 from RIS 2019/20.

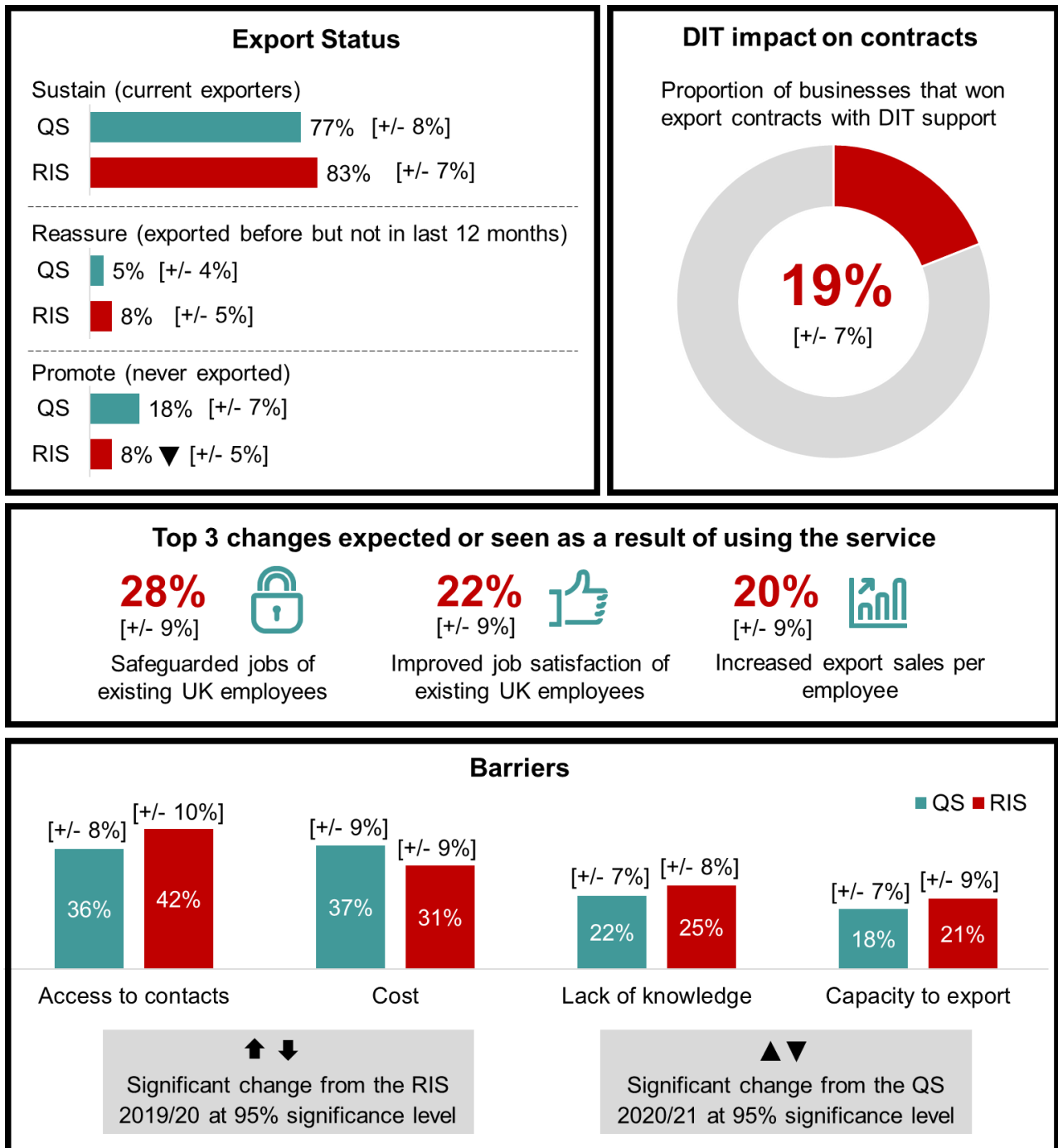
Impact on confidence

One in five (19%) reported that using the Export Opportunities service boosted their confidence to export in a new market, while 11% said this for increasing exports in an existing market. These findings were in line with the previous year.

Other impact

Half (51%) of Export Opportunities respondents reported that the Export Opportunities service helped them to gain access to information that they would otherwise have been unable to come by. Around two in five (43%) said it helped them to gain access to prospective customers, business partners or other people that they otherwise would have been unable to meet.

Chart 4.4.1 Key indicators from the RIS (Export Opportunities)



Base: All businesses that used Export Opportunities and completed both surveys (n=122); Barriers (QS n=122) – Access to contacts (RIS n=122), Cost (RIS n=121), Lack of knowledge (RIS n=121), Capacity to export (RIS n=122).

4.4.2. Satisfaction with Export Opportunities (from Quality Survey)

In the QS 2020/21, around a quarter of businesses (27%) that used Export Opportunities said they would recommend the service, while two in five (42%) said they would not. This gave Export Opportunities a Net Promoter Score (NPS) of -15. Over two in five (43%) reported they were satisfied with the Export Opportunities service, and a similar proportion (45%) said the overall service met their needs.

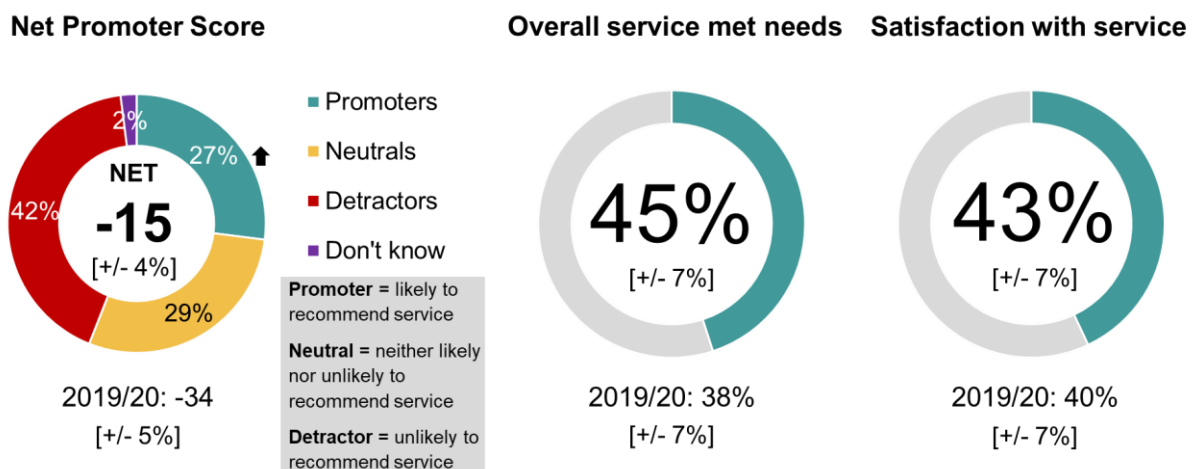
Compared to the previous year, the likelihood of recommending the Export Opportunities service increased (27% compared to 16% in 2019/20). Satisfaction remained in line with the previous year.

Export Opportunities respondents were most positive about staff knowledge (63%) and how clear the steps were that they needed to take when using the service (61%). These findings were in line with the previous year.

As a result of using Export Opportunities, three in five businesses (62%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all Export Opportunities respondents, over half (54%) said they had identified new export opportunities or made new contacts. Around half (48%) had researched the paperwork and regulations needed to export, an increase from the previous year (48% compared to 38% in 2019/20).

Export Opportunities respondents were most likely to report that 'access to networks' was a barrier to exporting (43%), followed by 'cost' (36%). These findings were in line with the previous year.

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



From the Quality Survey 2020-21:

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

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

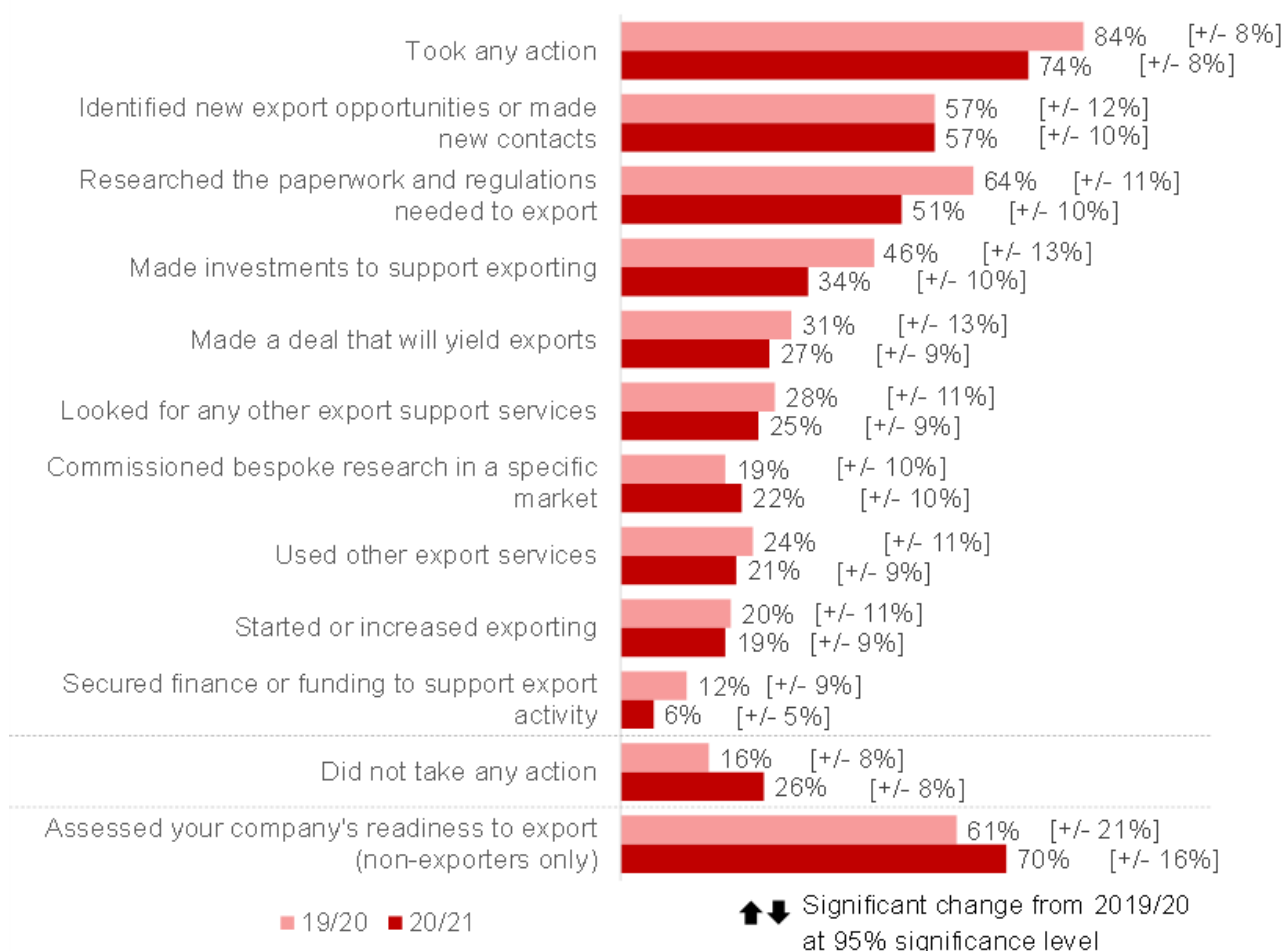
Qsatis – Using the same scale as before, thinking about your overall experience of Export Opportunities, how satisfied were you with this service? Base: All businesses that used Export Opportunities (excluding 'not applicable' responses) (n=300).

4.4.3. Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the Export Opportunities service (Chart 4.4.3). Around three in five reported that they had identified new export opportunities or made new contacts (57%), while half had researched the paperwork and regulations needed to export (51%). Seven in ten businesses (70%) that were not exporting had assessed the business' readiness to export.

These results were in line with the previous year (2019/20 RIS).

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

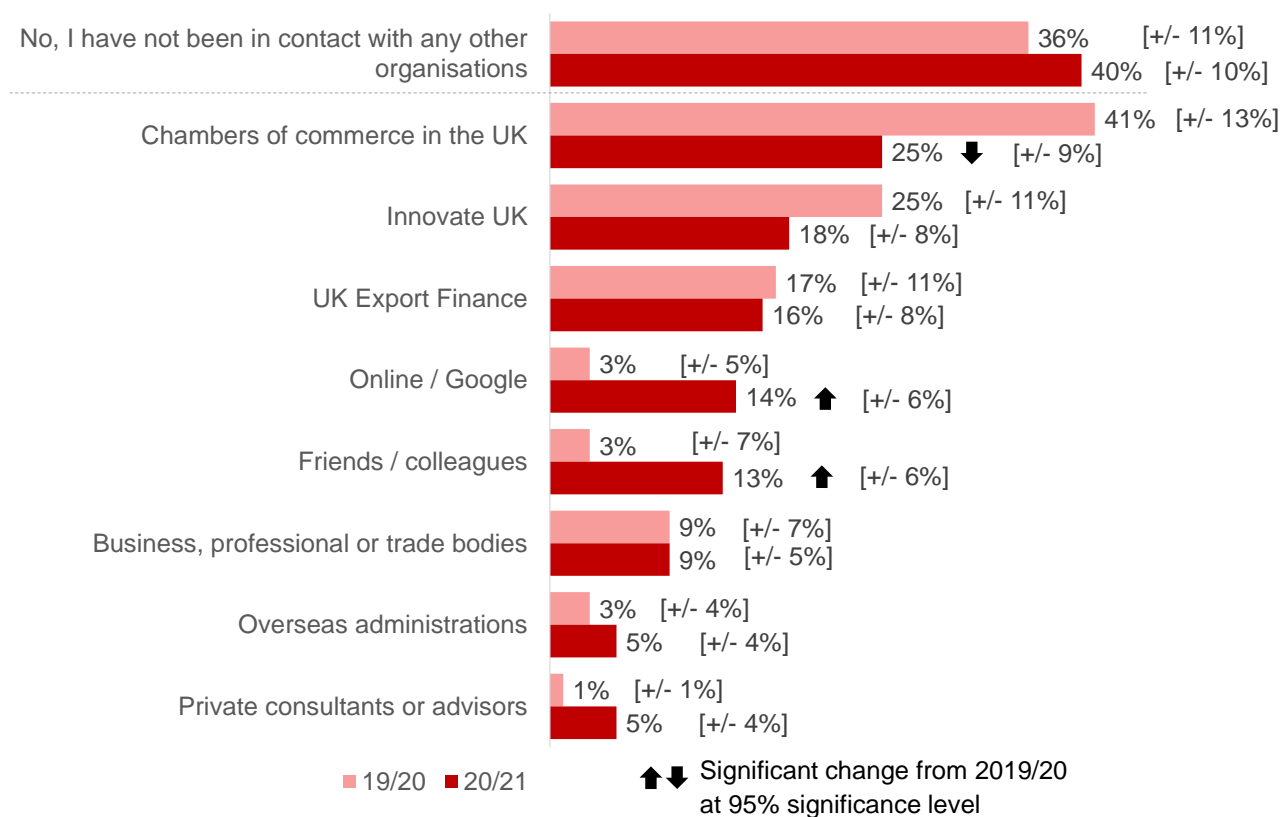


QresultService: What has your business done as a result of Export Opportunities? Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20)). 'Took any action' includes non-exporters who responded 'Assessed company's readiness to export'.

Businesses were asked what organisations they had been in contact with since using the Export Opportunities service. A quarter (25%) had been in contact with the British Chambers of Commerce, around one in five (18%) had been in contact with Innovate UK, and one in six (16%) had been in contact with UK Export Finance. Two in five businesses (40%) had not been in contact with any other organisations regarding assistance with overseas trade.

In comparison to the 2019/20 RIS, businesses were more likely to have been online or on Google (14%, up from 3% in 2019/20), or in contact with friends/colleagues (13%, up from 3%). Businesses were less likely to have been in contact with the British Chambers of Commerce (25%, down from 41%).

Chart 4.4.4 What organisations respondents have been in contact with since receiving the service – Export Opportunities



*QanyContact: And again, since your business used Export Opportunities in [MONTH] [YEAR] have you been in contact with any of the following to find out more about exporting or support any current or future exporting activities? Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20)). Coded responses with 5% or more are included. *Small base sizes*

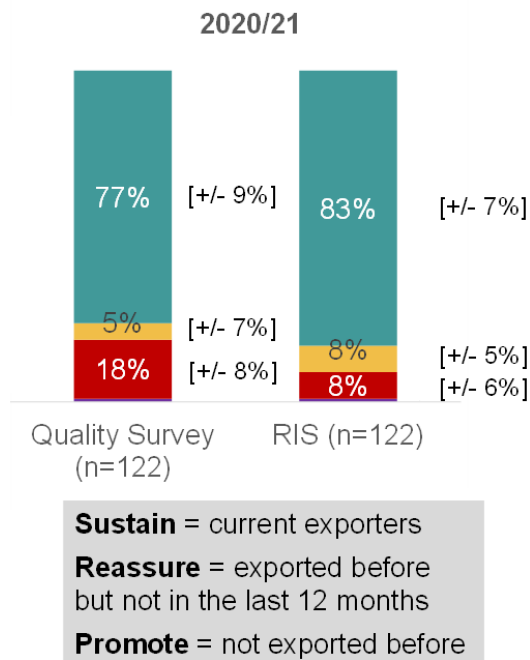
4.4.4. Reported impact on exporting

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

- **Sustain:** refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around three-quarters of businesses (77%) that used Export Opportunities fell into this segment at the time of the service delivery (QS 2020/21). This was similar (83%) in the RIS 12 months later.
- **Reassure:** refers to lapsed or intermittent exporters. These are UK businesses that have previously exported but have not done so in the past 12 months. Five per cent of businesses that used Export Opportunities fell into this segment at the time of the service delivery (QS 2020/21), and this was similar 12 months later (eight per cent).
- **Promote:** refers to self-identified potential exporters. These are UK businesses that have never exported but believe they have goods or services which could potentially be exported or developed for export. Around one in five (18%) that used Export Opportunities were in this segment at the time of the service delivery (QS 2020/21). This decreased 12 months later to eight per cent.

There were no changes when comparing results from this survey with the RIS 2019/20.

Chart 4.4.5 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Export Opportunities



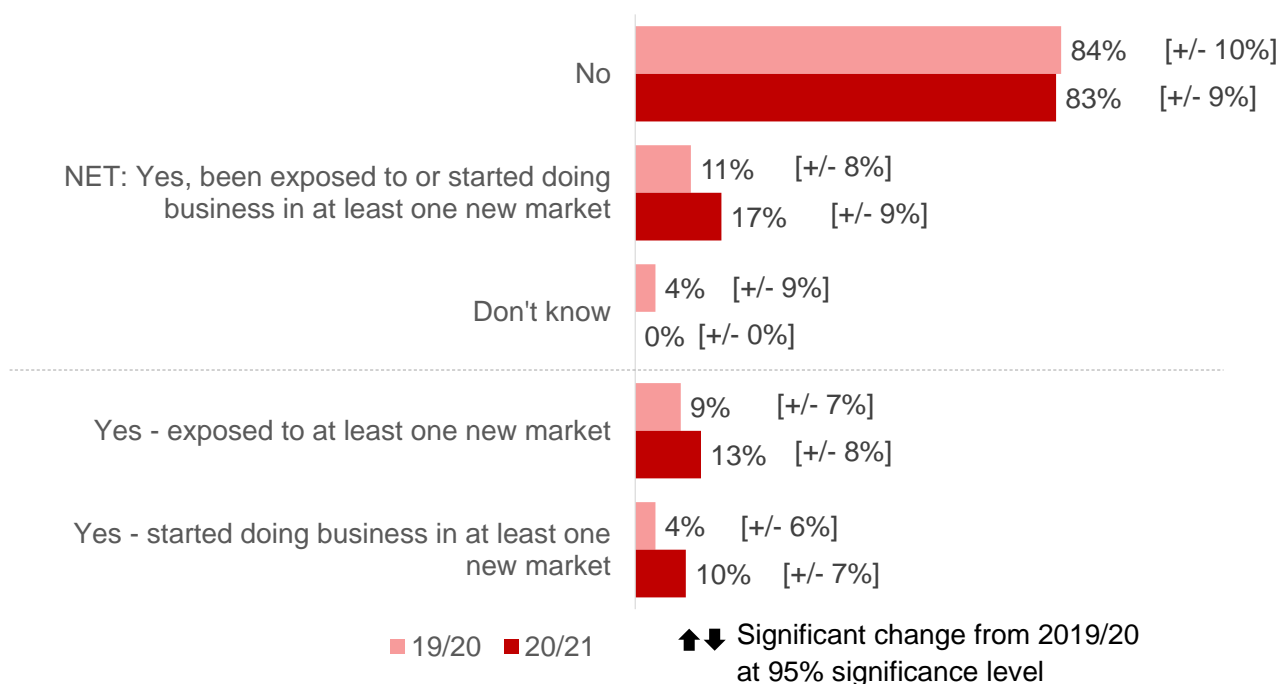
Source: Composite measure merging data from several variables. Base: All businesses that used Export Opportunities and completed both surveys (n=122)

4.4.5. Recorded exposure and growth within new markets

All businesses that used Export Opportunities were asked whether they had increased their exposure or started doing business in any new markets because of using the Export Opportunities service³⁶. Similar proportions of businesses said they had been exposed to at least one new market (13%) and had started doing business in at least one new market (10%) as a result of using the Export Opportunities service. These results are in line with the previous year.

³⁶ Respondents could select both if they had been exposed to at least one new market and if they had started doing business in at least one new market.

Chart 4.4.6 Whether increased exposure or starting business in a new overseas market – Export Opportunities



QGrowthDIT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
 Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20) *Small base sizes

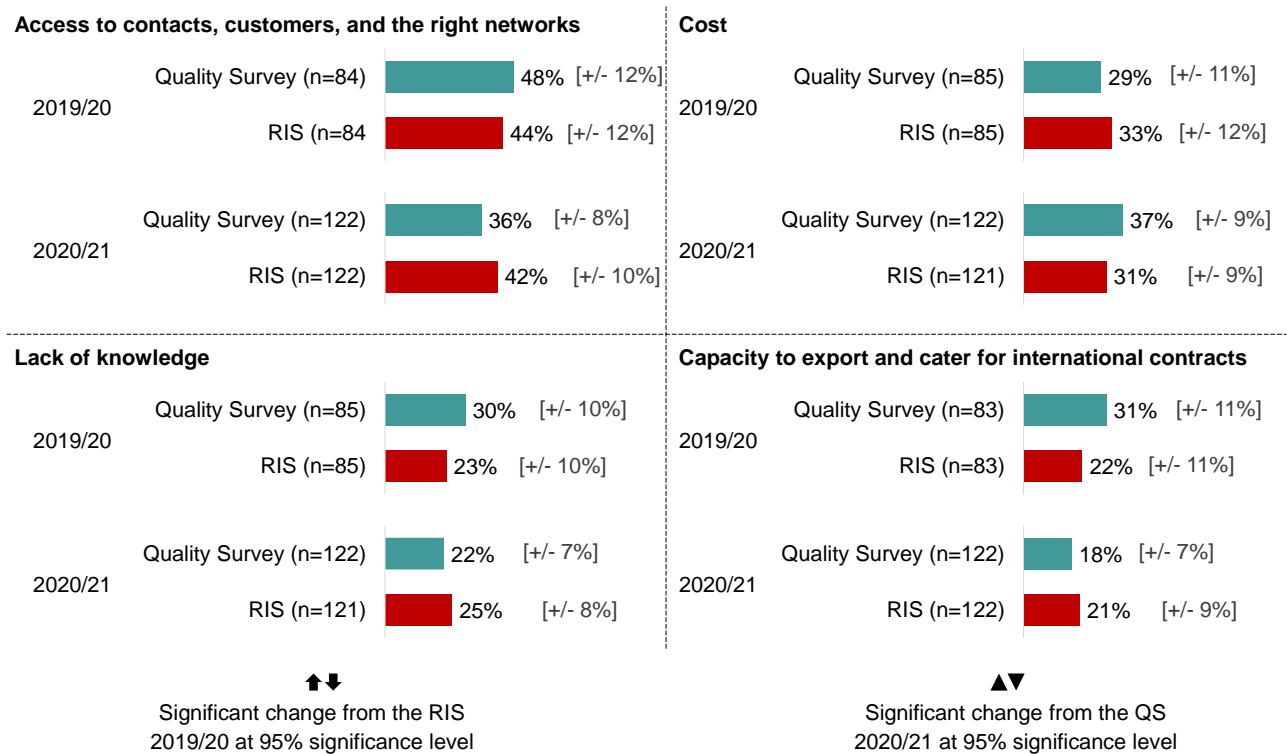
4.4.6. Barriers to exporting

Businesses were asked in both the QS and RIS about four **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)³⁷.

The top barrier in RIS 2020/21 was 'access to contacts' (42%), followed by 'cost' (31%). The findings were in line with responses to the QS 2020/21, and the previous RIS (2019/20).

³⁷ This section compares results for businesses who completed both surveys and provided a response to this question in both surveys. Businesses that said a barrier was not applicable in either survey were excluded.

Chart 4.4.7 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Export Opportunities³⁸



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

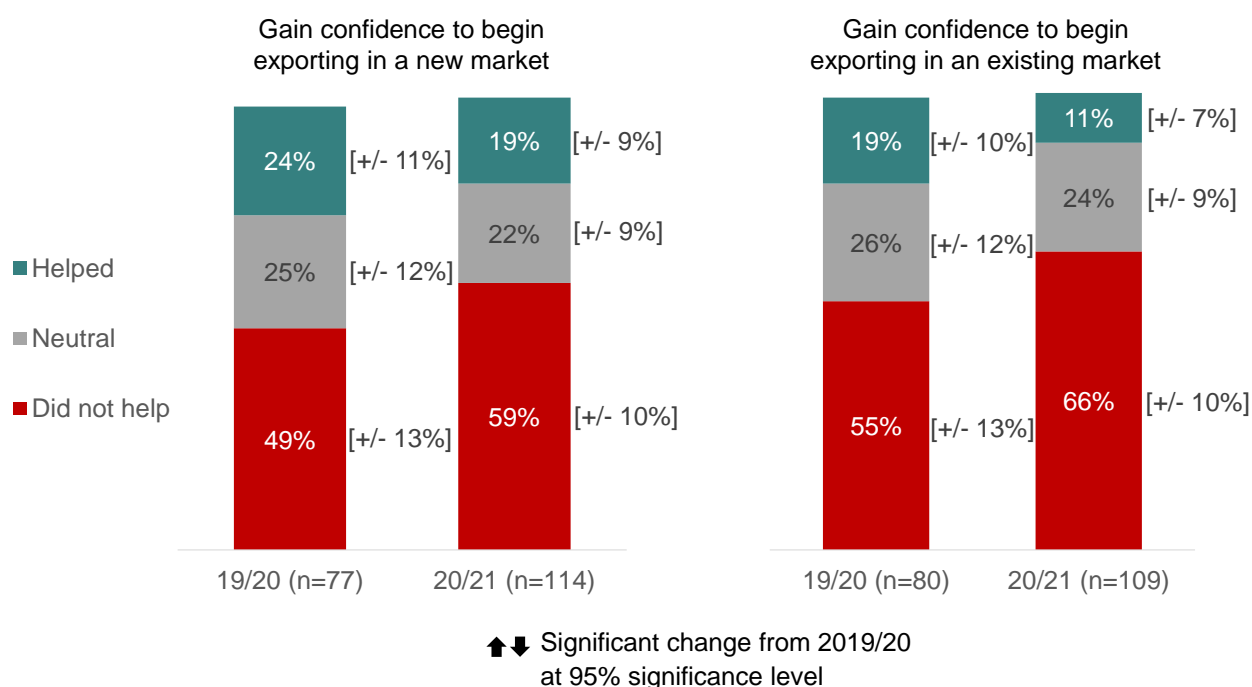
³⁸ The percentages shown in this chart are for businesses that rated a factor as 7-10 out of 10 when asked how much of a barrier it is.

4.4.7. Wider benefits of the service

Businesses were asked to think about the extent to which using the Export Opportunities service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market. More businesses reported that using the Export Opportunities service had not given them confidence to begin exporting in a new market (59%) or to increase exporting in an existing market (66%), than did. One in five (19%) reported that using the Export Opportunities service had given them confidence to begin exporting in a new market and one in ten (11%) reported that it given them confidence to increase exporting in an existing market.

These results are in line with the previous year.

Chart 4.4.8 To what extent using the Export Opportunities service helped to build confidence to export



QGainConfidence: On a scale of 0 to 10, where 0 means not at all and 10 means a lot, to what extent did your experience of Export Opportunities help you to...? Helped (7-10), Neutral (4-6), Did not help (0-3). Base: All businesses that used Export Opportunities not including those who gave a 'not applicable' answer.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**³⁹. Chart 4.4.9 below shows how businesses rated the impact of using the Export Opportunities service on their knowledge.

On balance, more businesses reported that using the Export Opportunities service was **not helpful for increasing their knowledge of support available to them (from DIT and elsewhere)**. One in five businesses (20%) reported that using the Export Opportunities service was **helpful for increasing their knowledge of support available to them (from DIT and elsewhere)**, while around half (47%) said it did not help them do this.

Similarly, more businesses on balance reported that the service was **not helpful for increasing their knowledge of export opportunities available or improving their knowledge of the**

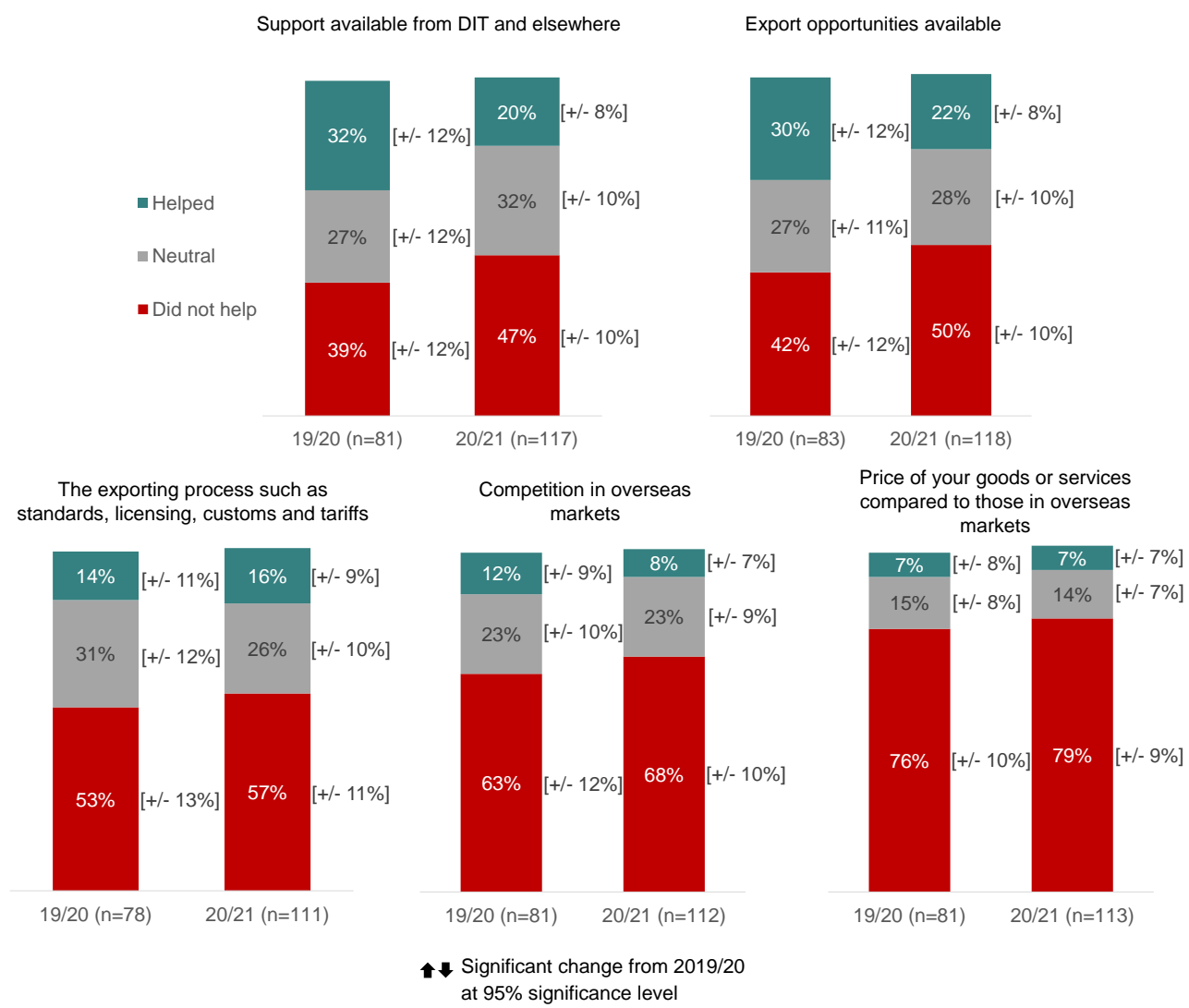
³⁹ Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

exporting process. One in five (22%) businesses reported that using the Export Opportunities service was **helpful for increasing their knowledge of export opportunities available**, but half (50%) said it did not help them in this way. One in six businesses (16%) reported that using Export Opportunities improved **their knowledge of the exporting process**, compared with nearly three in five (57%) who said they were not helped in this way.

Only small proportions said that using Export Opportunities improved their **knowledge of the price of goods** compared with those in overseas markets (7%) or about their **competitors in overseas markets** (8%).

These findings were in line with the previous year (2019/20).

Chart 4.4.9 To what extent the business felt that their knowledge has improved as a result of using the service – Export Opportunities



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

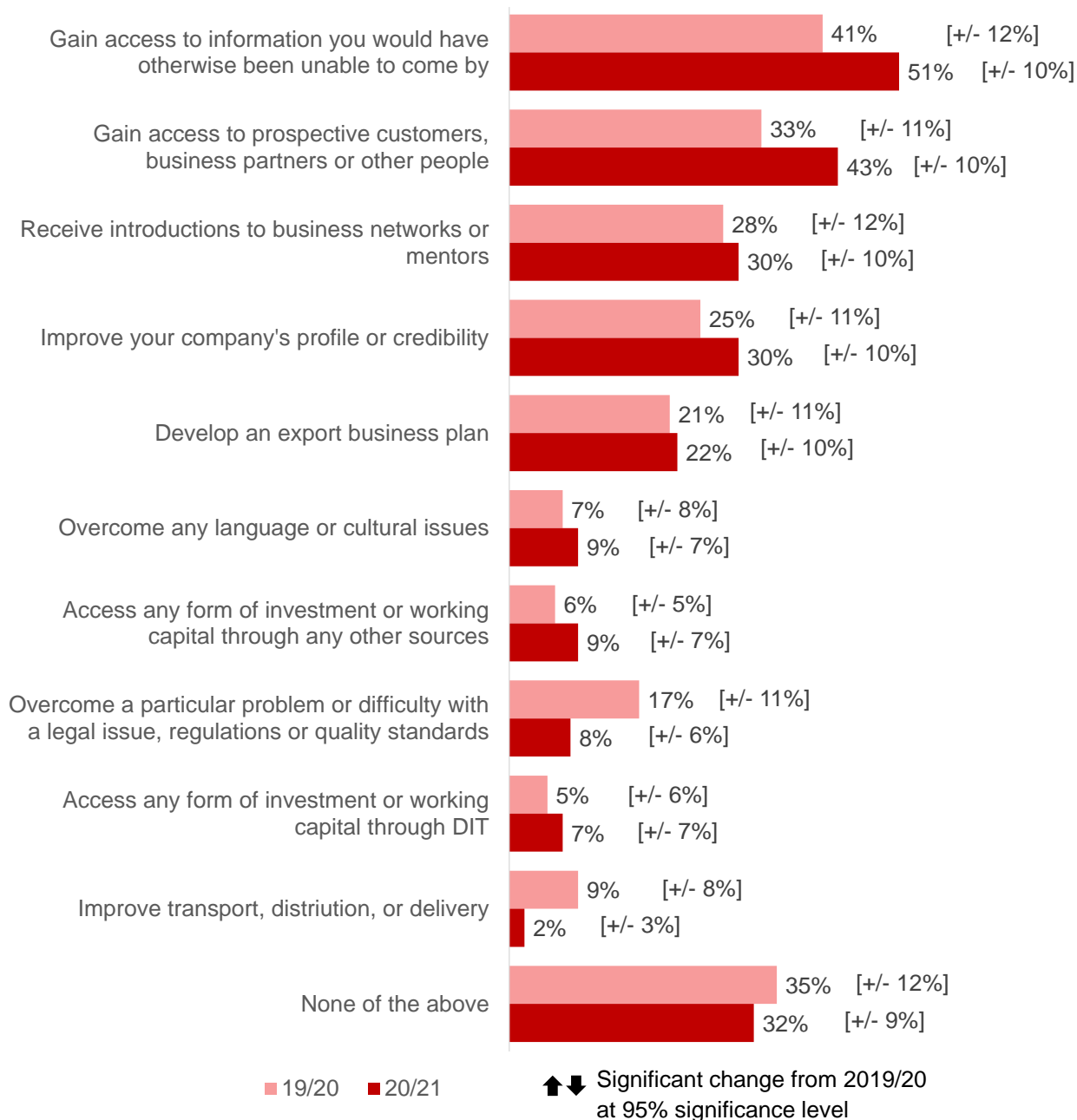
Businesses were asked about other ways they had benefitted from using Export Opportunities in the year between dealing with the Export Opportunities and taking part in the RIS.⁴⁰ A detailed breakdown of responses is shown in Chart 4.4.10.

The top responses were: helping businesses to gain access to information that they would otherwise have been unable to come by (51%), and gaining access to prospective customers, business partners or other people that they otherwise would have been unable to meet (43%). A third (32%) felt that using the Export Opportunities service had not helped them in any of the ways listed.

There were no significant changes compared to the 2019/20 RIS.

⁴⁰ Respondents were asked to select from a pre-coded list and had the option to provide an 'other' answer

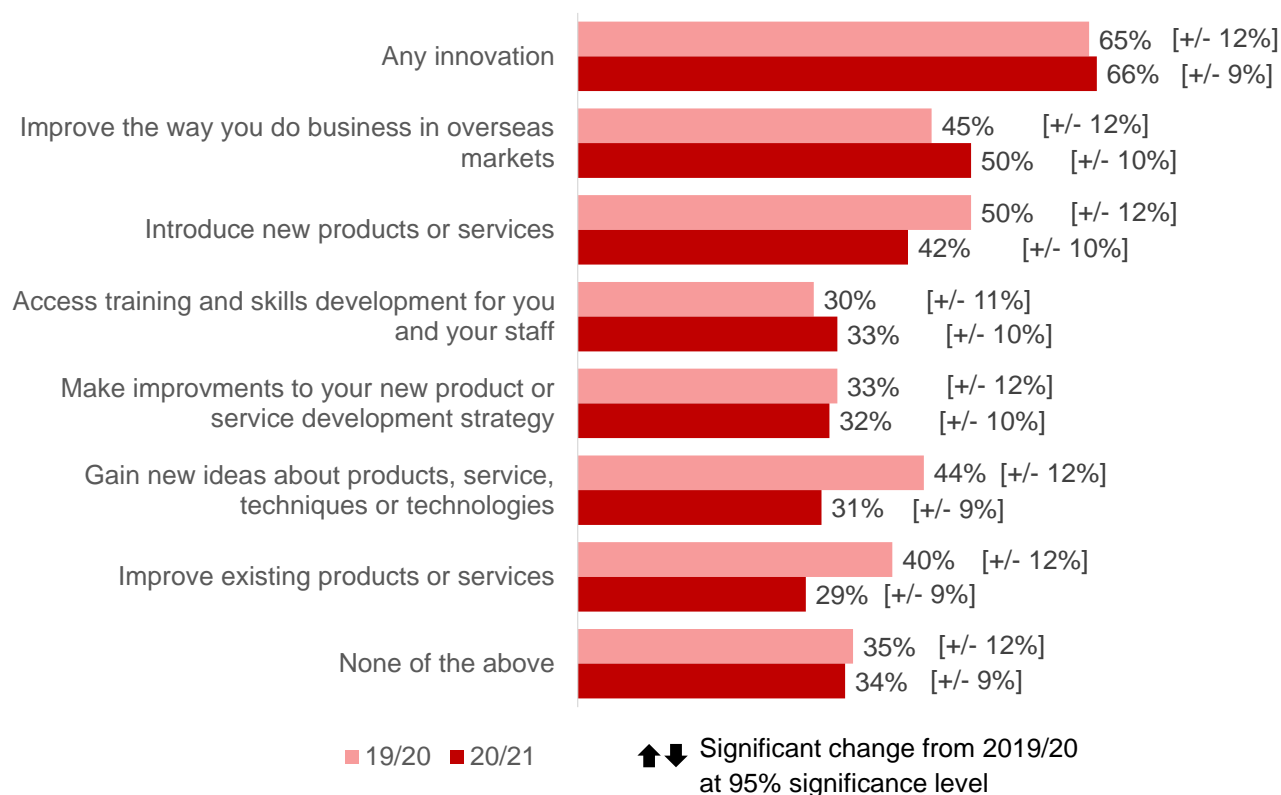
Chart 4.4.10 In what ways has the business felt it had benefited from DIT support – Export Opportunities



*QServiceBenefit: in which of the following ways if any, has your business benefited specifically from Export Opportunities over the last year? Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20)) *Small base sizes*

Businesses were asked whether using the Export Opportunities service had helped, or was likely to help, support innovation and/or development in their business. Two-thirds (66%) said that using the service helped them with innovation or development in some form. The most frequent responses were to improve the way they do business overseas (50%) and to introduce new products or services (42%). These findings were in line with the 2019/20 RIS.

Chart 4.4.11 Whether the service has / is likely to help innovation and development – Export Opportunities



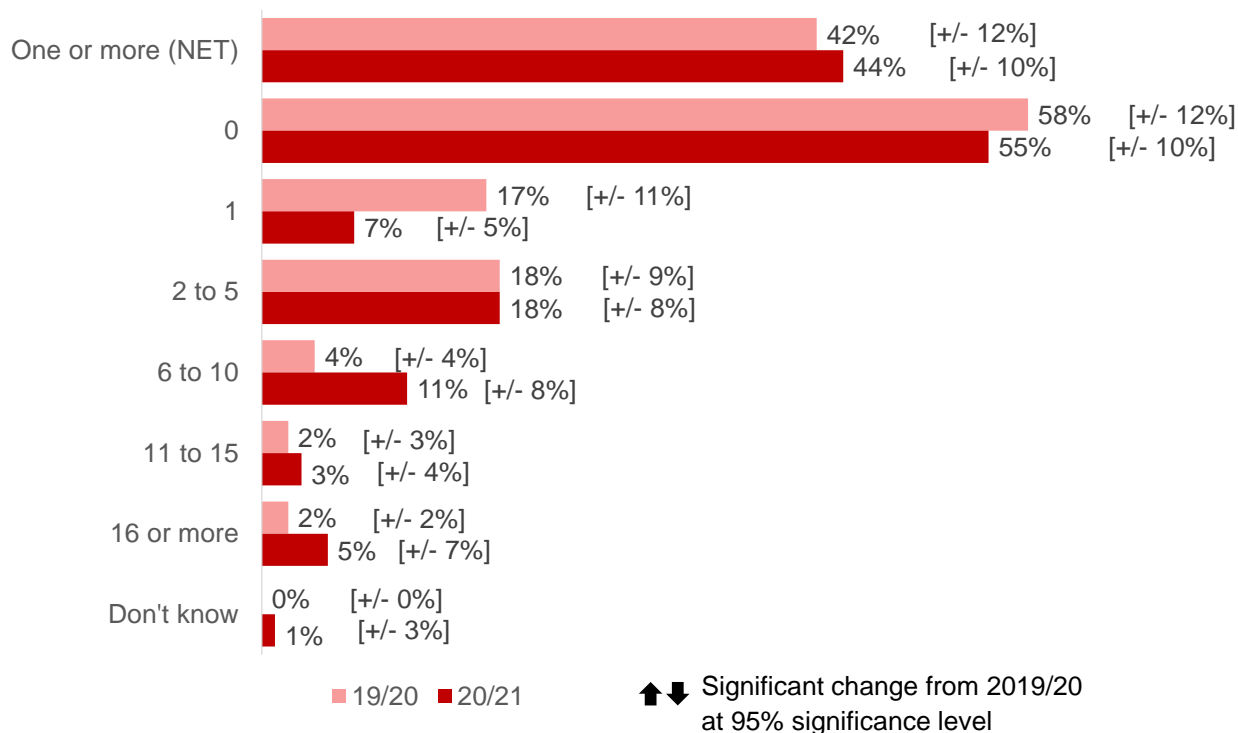
*QInnovationSupport: Still thinking of Export Opportunities, has this service helped or do you expect it to help your business with development and/or innovation? Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20)) *Small base sizes*

International contacts

Businesses were asked how many overseas contacts they had made as a result of using Export Opportunities over the past year (Chart 4.4.12). Over two in five (44%) businesses made at least one new overseas contact in the year since using the Export Opportunities service, with around one in five (18%) making between two and five new contacts and five per cent making more than 15 new contacts. Over half (55%) of businesses reported that they had not made any new contacts as a result of using the Export Opportunities service. These findings were in line with the 2019/20 RIS.

The average number of contacts made was three, similar to the average number in the 2019/20 RIS (two).

Chart 4.4.12 Number of new overseas contacts made in previous 12 months – Export Opportunities

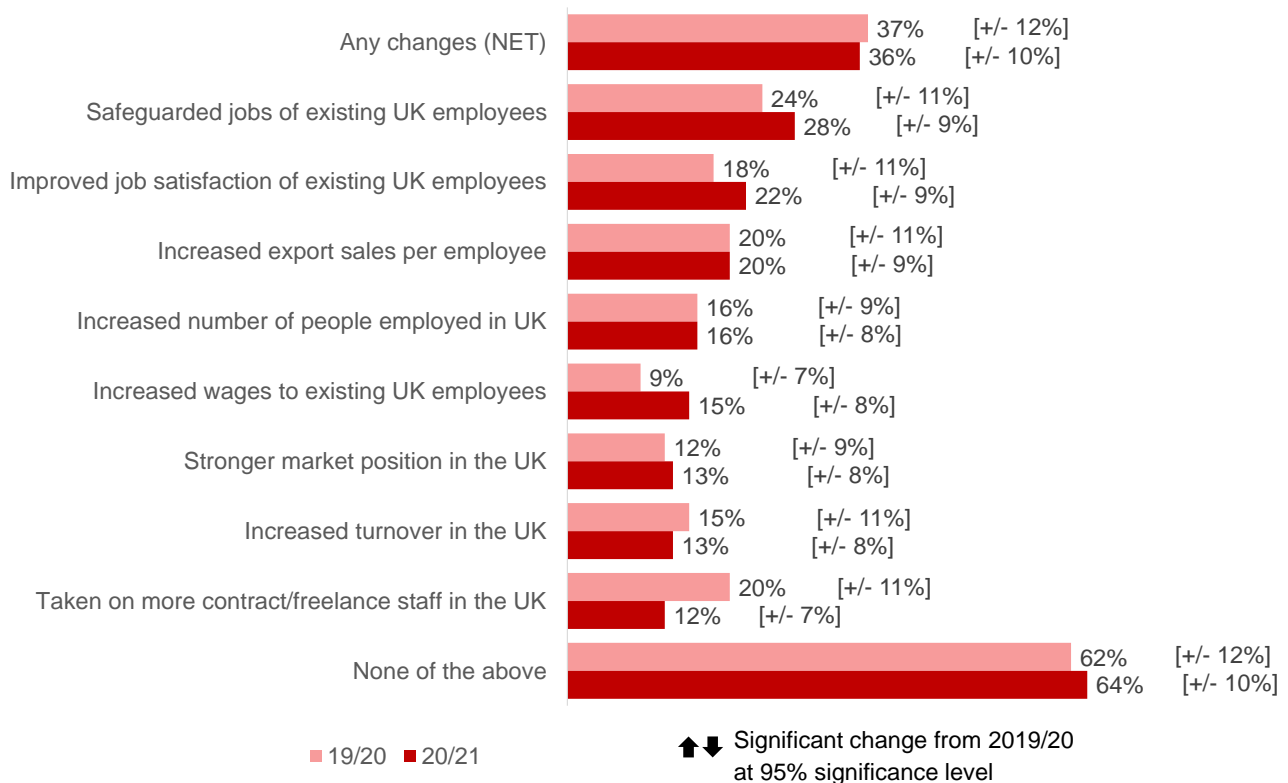


Q_ContactsMade: How many new overseas contracts, if any, did your business make as a result of Export Opportunities in the past year? Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20)) *Small base sizes

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Export Opportunities service. Around three in ten businesses said they thought using the Export Opportunities service had, or would, safeguard jobs in the UK (28%), while around one in five had seen or expected to see an impact on improved job satisfaction among existing UK employees (22%) or increased export sales per employee (20%).

These findings were in line with the 2019/20 RIS.

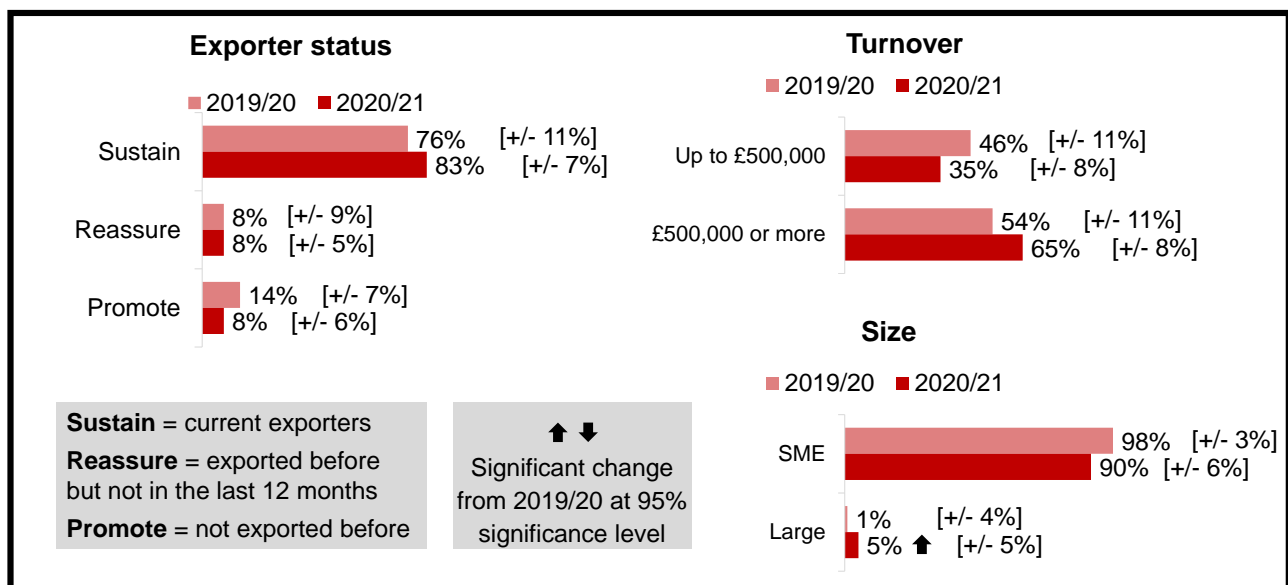
Chart 4.4.13 Changes expected / seen in the UK business as a result of receiving the service – Export Opportunities



QUKChanges – Which of the following changes have you seen within your UK business as a direct result of Export Opportunities?
 Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20)) *Small base sizes

4.4.8 Profile of respondents

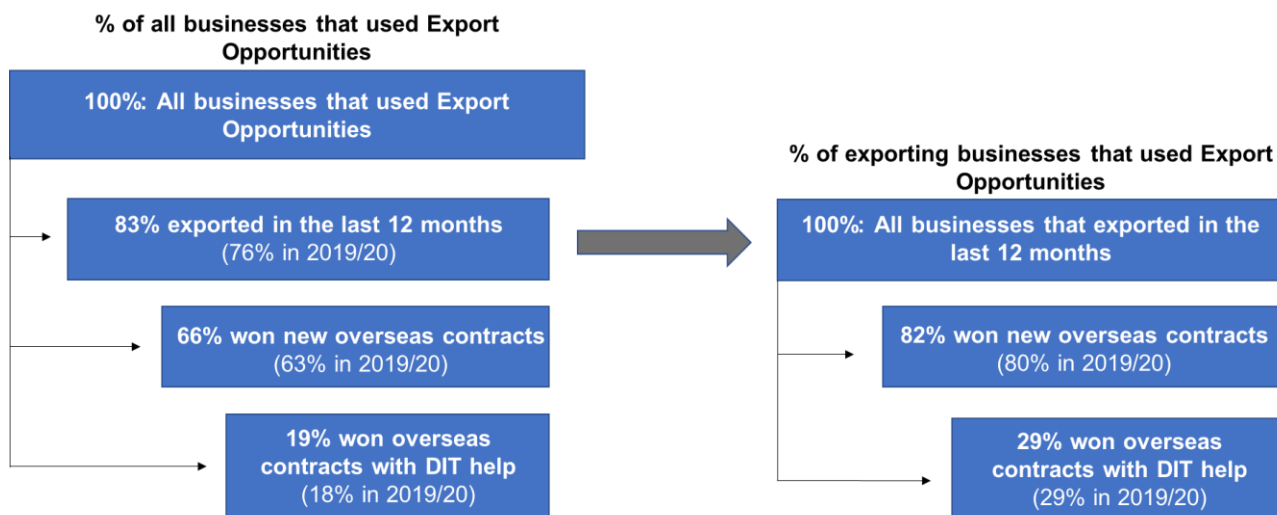
Chart 4.4.14 Profile of RIS Respondents – Export Opportunities



Looking at all businesses supported by Export Opportunities interviewed in the survey (including those that did not export or did not win any new or extend any overseas contracts at the time of the RIS), around four in five (83%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. The turnover profile of the businesses supported by Export

Opportunities in the survey remained in line with the previous year⁴¹, while the proportion of large businesses increased (from 1% in 2019/20 to 5% in 2020/21).

Chart 4.4.15 Summary of businesses supported by Export Opportunities



Median value of export sales **won per business** with DIT support: **£94,000** (£15,000 in 2019/20)

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

Base: All businesses that used Export Opportunities (n=122 (2020/21), n=85 (2019/20))

⁴¹ There was a higher proportion of 'Don't know' and 'Refused' responses in the Quality Survey 2020/21 for turnover. 'Don't know' and 'Refused' responses have therefore been removed from Turnover to maximise comparability.

Appendix: Reporting exporting outcomes based on ‘all respondents’

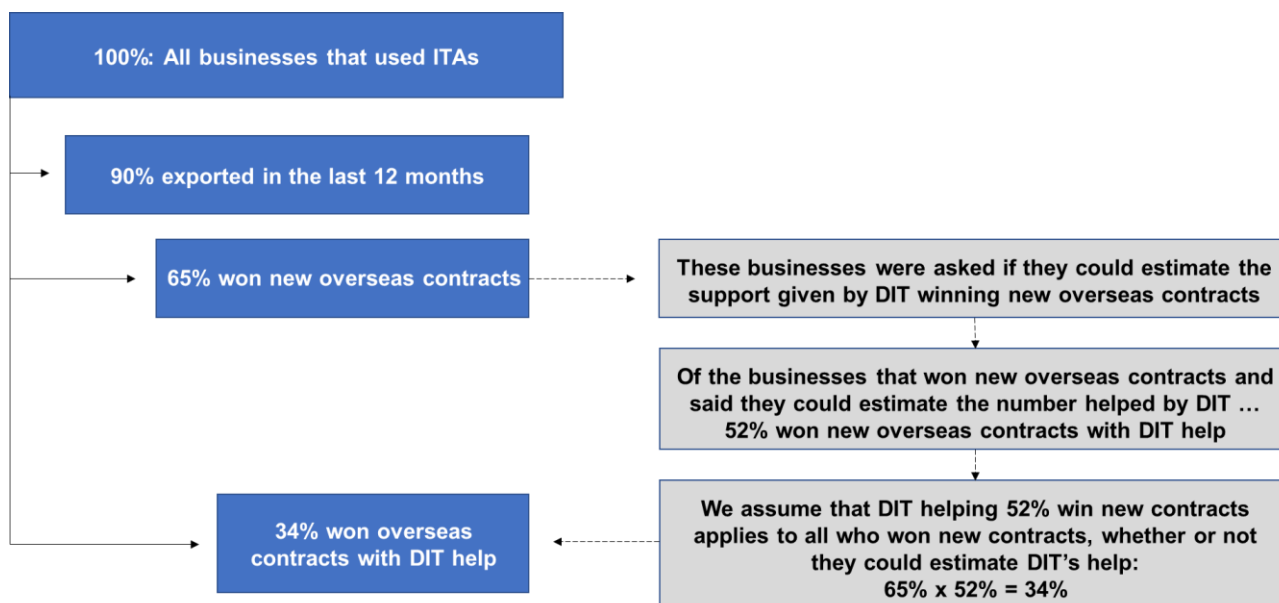
There are several charts within the RIS report (such as chart 4.1.10) which report on the proportion of all businesses that DIT helped win new overseas business contracts. It is important to note that not all exporting businesses were asked about the amount of help given by DIT for these new overseas sales contracts.

In line with previous waves, businesses that answered yes to questions QContractService⁴² or QContractDIT⁴³ were asked a series of questions about the impact of DIT services on their new overseas business contracts. Businesses that answered *no* were not asked about the levels of assistance given by DIT in helping them win new overseas contracts. Therefore, a proportion of those that had won any new overseas business contracts were not asked questions about DIT help on their ‘export sales’.

In order to calculate data based on the proportion of all businesses that DIT helped win any new overseas business contracts an additional calculation was necessary. The assumption was made that the proportion of businesses ‘helped’ by DIT was the same for those that could provide an estimate as it was for those that could not provide an estimate.

The proportion of businesses that won new overseas contracts was multiplied by the proportion of businesses that won new overseas contracts that could both estimate the number helped by DIT and had won any as a result of DIT help. If the respondent said “No - DIT made no impact” then they were given a response of 0 contracts helped by DIT.

The chart below shows the process.



⁴² QContractService: *Do you think you are able to estimate the number and value of new overseas business contracts that your business won in the last 12 months that were helped by using the [SAMPLED SERVICE] service?*

⁴³ If the answer to QContractService above was not “Yes” the respondent was asked QContractDIT: *Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DIT?*

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